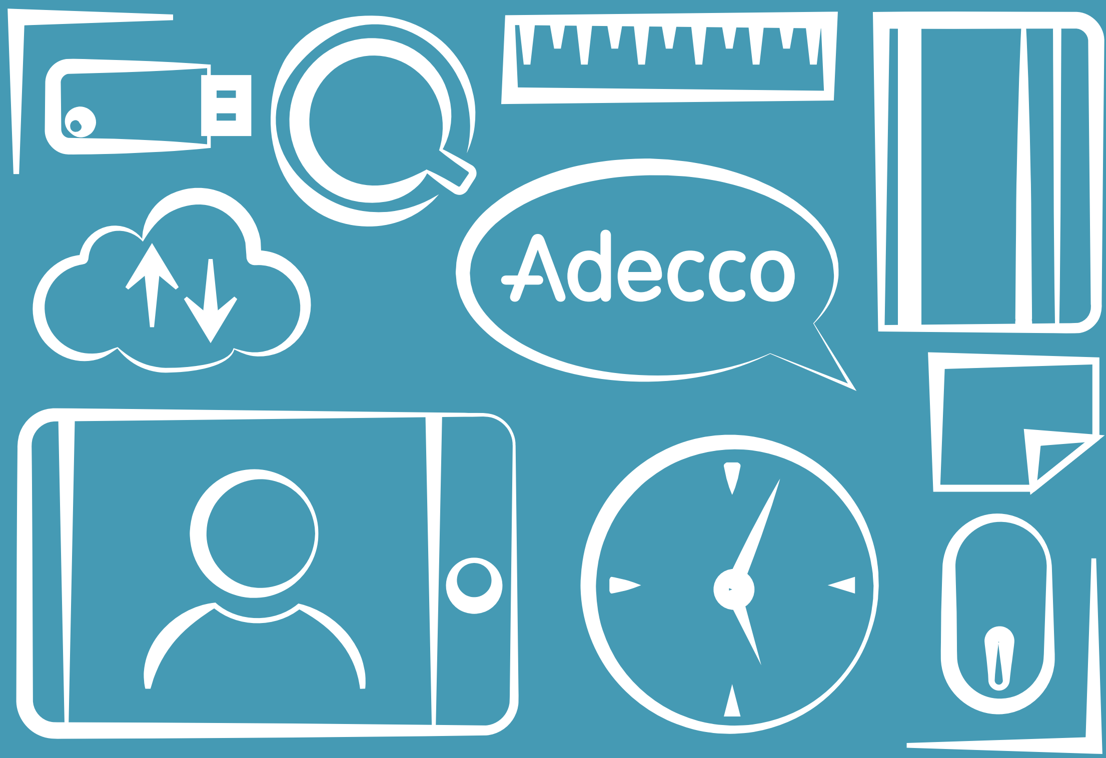


Discover the future of social recruiting
and smartworking

Work Trends Study

#wtsadecco

A GLOBAL STUDY BY Adecco

ABOUT THE WORK TRENDS STUDY

The Adecco Group is the world's leading provider of HR solutions, with more than 32,000 FTE employees and around 5,100 branches, in over 60 countries and territories around the world.

Following the success of our 2014 Global Study on Social Recruiting, in 2015 we have conducted research into how job seekers and recruiters use social media to search for jobs or candidates, and what they think about smartworking.

The research brought together a sample of 31,793 job seekers from 26 countries (see appendix for full list), of whom 23,085 filled out the questionnaire completely (73%), and 4,168 recruiters of which 1,825 (44%) provided full responses.

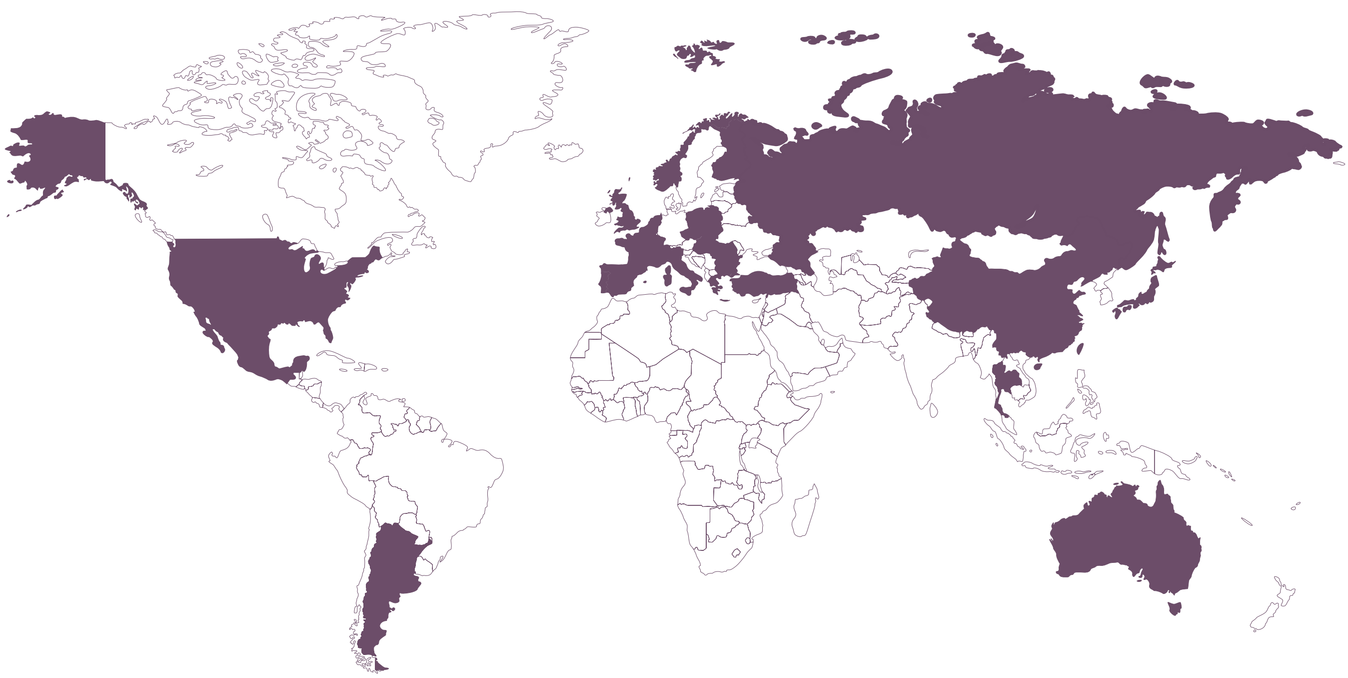
We have aggregated our findings under four broad geographical regions:

Central Europe, which includes Belgium, Finland, France, Italy, the Netherlands, Norway, Portugal, Spain, Switzerland and the UK for a total of 17,670 job seekers (66%) and 1,130 recruiters (53%).

Asia, which includes Australia, China, India, Japan and Thailand, for a total of 994 job seekers (4%) and 615 recruiters (29%).

The Americas, which include Argentina, Mexico and the USA, for a total of 6,169 job seekers (23%) and 178 recruiters.

The Eastern European Countries, which include Bulgaria, the Czech Republic, Greece, Hungary, Poland, Romania, the Russian Federation, Slovenia and Turkey, for a total of 1,961 job seekers (7%) and 221 recruiters (10%).



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EXECUTIVE SUMMARY

The world of work is changing. New trends are emerging that will affect the work environments of large corporations and small businesses alike. To find out how job seekers and recruiters use social media to search for jobs or candidates, and what they think about smartworking, Adecco, the world's leading provider of HR solutions, has conducted this Work Trends Study.

Extending the scope of the 2014 Social Recruiting Study, the 2015 Work Trends Study also looks at emerging practices and beliefs around smartworking and draws some interesting conclusions on how both job seekers and recruiters see the way we will work in the future. Technology is changing not only the way people search for jobs and recruit candidates – the social media sphere is increasingly becoming the new job marketplace - but also the very concept of the 'workplace'. The impact of smartworking and flexible working environments will require new thinking on the traditional relationship between employer and employee.

The study was conducted in 26 countries (see appendix for full list), making it the most comprehensive global study on the future of search and select as well as the workplace environment. Over 31,793 job seekers and more than 4,168 recruiters responded to a survey developed in partnership with the Università Cattolica in Milan, Italy.

Main findings

1. LinkedIn is for job searches but Facebook defines reputations. Among job seekers, there is a clear division between the use of LinkedIn and Facebook. LinkedIn has proved to be the most popular platform for all online job search activities, whereas Facebook is the go-to network for all social activities including personal branding and checking out what other people say about employers. Recruiters do not make such a clear division between Facebook and LinkedIn. They prefer both networks, though LinkedIn is more popular for recruiting activities. They use both networks for employer branding and checking a candidates' online reputation. They also use both LinkedIn and Facebook at an equal rate to evaluate a candidate's personality.

2. The most commonly used channels: corporate websites are falling, social media is growing and job seekers are more 'mobile' than recruiters. Out of the total job search or recruitment activity spent online, both job seekers and recruiters spend most of their time with job boards and corporate websites. In this comparison, social media ranks third and has thus a much lower priority.

For the coming year, recruiters foresee that the use of career sections on corporate websites will remain stable, however job boards are losing grounds in favour of social media. Job seekers are more 'mobile' than recruiters: two thirds of job seekers frequently or sometimes use a mobile device for online job searches, whereas among recruiters, this figure drops to 41% when searching for a candidate or highlighting open positions.

3. Job seekers and companies both need to watch their reputations. A third of recruiters say they ask candidates about their presence on social media and almost the same number say they have rejected at least one candidate because of the content they posted online. The most frequent reasons for rejection are contradictory information between an online and offline CV, an assessment of personality traits and posting of improper or unsuitable images. However, the presence of political opinions expressed by candidates proved to be irrelevant to recruiters and discriminatory content was deemed marginally relevant. An interesting point is the fact that job seekers use the web to evaluate the reputations of companies: over two-thirds of those asked said that search on Google or reputation websites, despite the fact that specific websites exist, such as Glassdoor or Kununu. However, very few people stated that they have written reviews of a company through one of these platforms .

4. Which candidates are contacted through social media? Just over a fifth of job seekers interviewed during the survey were contacted by a recruiter through social media. Also in this case, the most popular social network for this activity was LinkedIn, with middle and senior manager positions more frequent sought after than non-managerial positions, and permanent positions more frequently than temporary roles.

5. Seek and find. A strong correlation has emerged between the intensity of a candidate's online search for work and the results achieved. The probability of being contacted by a recruiter increases with the number of social networks used by a candidate. If a candidate only uses one network, the probability for being contacted is 16% but increases to 46% when the candidate uses all five of them. In addition, job seekers with a professional or personal blog have a higher percentage of being contacted online, as are those who link their social profiles on their printed CV.

6. Recruiters also find candidates who are not actively looking for a new job (or those who are discreetly looking). Social media networks are used by recruiters to contact passive candidates. People who say they are "not looking for work but are open to job offers" obtained interviews more often than those "actively looking for a job". So, regardless of their job search strategies, social recruiting is more effective for job seekers who are more active online professionally.

7. Smartworking - something of a mystery. Smartworking is a concept that not many respondents are aware of: two thirds of job seekers and almost half the recruiters say they have never heard of it. Among those who know something about smartworking, most of them define it as flexibility of working time and flexibility of workplace, with a large gap between those that define it as flexibility in work methods (focus on deliverables) and work tools (bring your own device policies). The percentage of people interviewed who had never heard of co-working is lower but still significant (half of job seekers and over two-thirds of recruiters). Furthermore, a third of respondents have heard of co-working but do not know what it involves.

8. I'd like to. Can I? Despite being unaware of the smartworking concept, respondents showed strong interest in such solutions: over half of job seekers would like to work from home, a similar number would prefer an office nearer to their home, a third would opt for a co-working space and the same number would work on the move. The data shows that female respondents would prefer to work from home, whilst men prefer workplace mobility. Moreover, co-working and mobile work are preferred more by younger people as an alternative to working from home.

Recruiters are more cautious than job seekers in appreciating smartworking solutions. Working from home was deemed to be the most suitable alternative, followed by co-working offices, company offices near employees' homes and working on the move. Furthermore, job seekers said they wanted to work outside the office for half of their total work time, while recruiters felt that the optimal percentage of work time outside the office was just over a third.

9. Smartworking: changing space to save time. Among those job seekers who declared their interest in flexible working solutions, over half would appreciate the chance to organise their work time independently, an aspect that recruiters do not consider very much. On the other hand, recruiters agree with the other main benefits of smartworking: improving work-life balance as well as reducing the time and costs of commuting. Relational aspects such as growing relationships with colleagues, reducing conflicts with colleagues and supervisors, and sharing knowledge with non-colleagues are considered less important.

10. Working from home to solve problems and at a co-working office to create opportunities. It is interesting to see that people choose to work from home mainly for organisational reasons (reduce commute time and costs, work-life balance, independent organisation of work time), while they choose co-working and mobile work mainly for professional reasons (higher accountability since results are more important than time spent in the office, sharing knowledge with non-colleagues, more creative and innovative approaches, increases in productivity).

11. Smartworking is for many people, but not for everyone. Recruiters feel that smartworking is more suited to middle and senior managers rather than for non-managerial roles, and for permanent positions as opposed to temporary or part-time roles. Departments felt most likely to benefit from smartworking are marketing, sales, IT, HR, and Corporate communication & PR. Those believed to be the least suitable are production and logistics. It is interesting to see that the positions recruiters would try to fill through social recruiting are the same ones they see as most suitable for smartworking. The three main categories for which smartworking is considered to be particularly suitable are qualified workers who live very far from their workplace, disabled workers and workers with childcare responsibility.

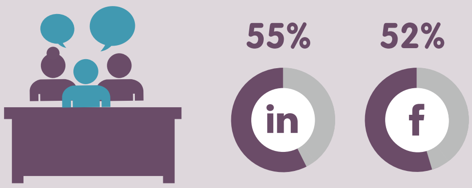
PART 1
SOCIAL RECRUITING

WHAT ARE THE MOST POPULAR SOCIAL NETWORKS?

The social network most commonly used for personal purposes is Facebook (80% of job seekers and 75% of recruiters).

The most popular for professional purposes is LinkedIn, both with recruiters (61% vs 32% Facebook) and job seekers (34% vs 24% Facebook).

Having a company profile on social networks is an established practice for companies: 31% of respondents stated they have had a company profile for more than 2 years. Companies are more likely have a company profile on LinkedIn than on Facebook.



Do you have an account on these social networks? If yes, is this for personal or professional use? (Job seekers vs Recruiters)

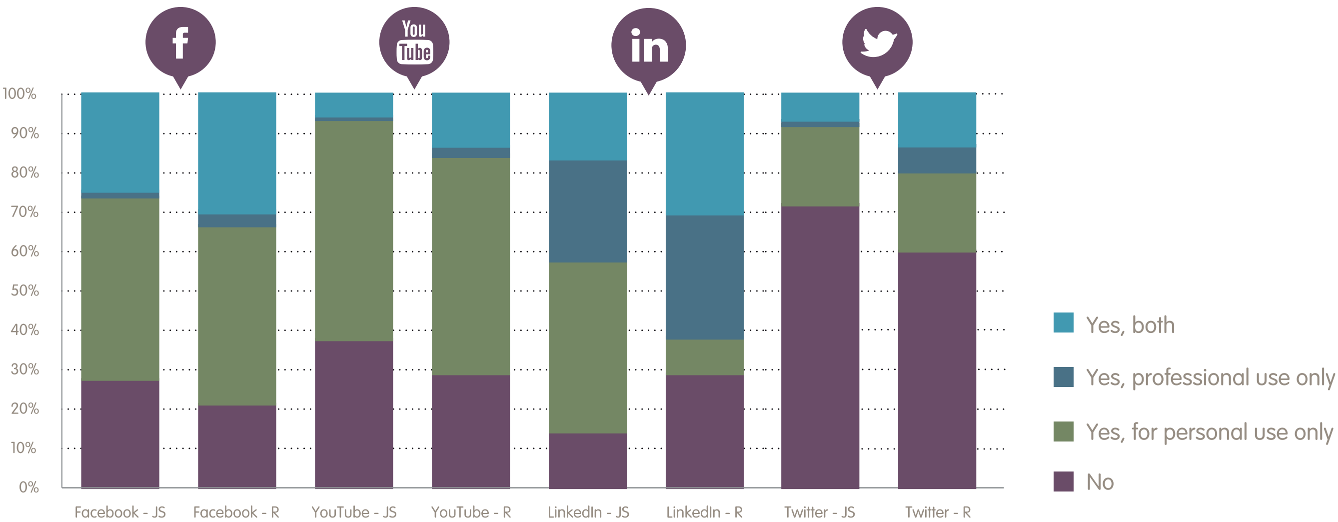


Figure 1

ARE THERE GEOGRAPHICAL DIFFERENCES IN SOCIAL NETWORK USAGE?

A significant number of job seekers (37%) and recruiters (25%) are still active online, but are using social media for their recruiting activities.

The most interesting differences are related to geographic location:

Central European job seekers are the most active social media users for professional purposes (44% vs 38% Asia, 27% Eastern European Countries and 23% the Americas).

Among recruiters, the most active users are based in Asia (39%), whereas Central European recruiters (29%) are more active than in the American (10%).

Do you have a social media account for professional use?

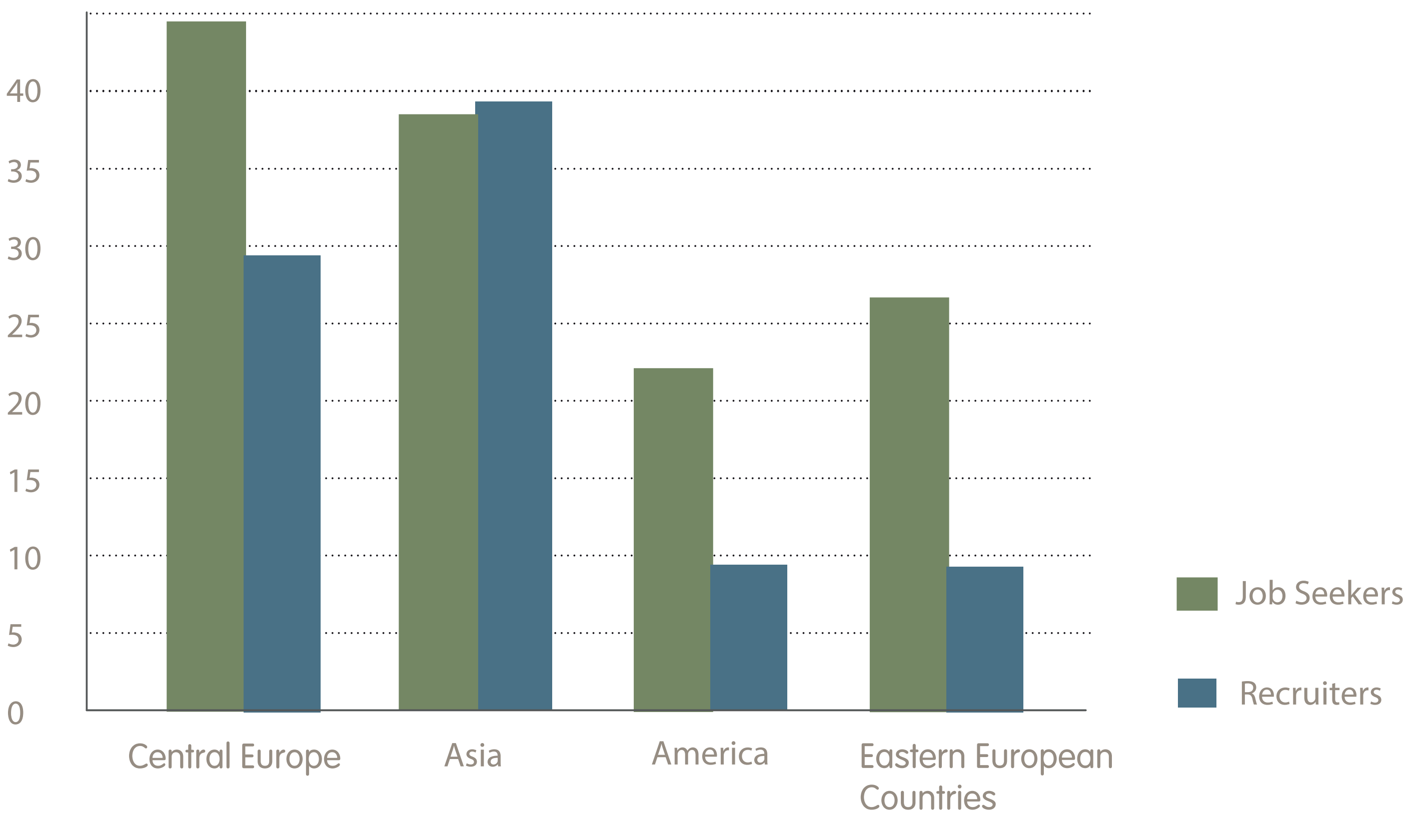


Figure 2

WHAT DO JOB SEEKERS USE SOCIAL NETWORKS FOR?

Most job seekers use social networks to keep in touch with colleagues (59%) or ex-colleagues (56%).

35% of candidates say they use social networks to contact potential employers.

24% of candidates say they use social networks to look for recruiters or head-hunters.

Only a relative minority (16%) use social networks to keep in contact with contractors or service providers.

> **“35% of candidates say they use social networks to contact potential employers”**

With regard to more frequent social networking activities for professional purposes, LinkedIn remains the most popular platform and turns out to be the most used platform for all activities except two - personal branding and verifying what other people are saying about their employers - which are mostly done through Facebook.

In general, the data reveals how LinkedIn is more widely used for ‘practical’ purposes (distributing one’s CV, professional networking and searching for job advertisements), while Facebook is preferred for ‘social’ purposes (such as checking the reputation of employers, personal branding and researching possible contacts).

Do you use these platforms for the following activities?
(Job seekers)

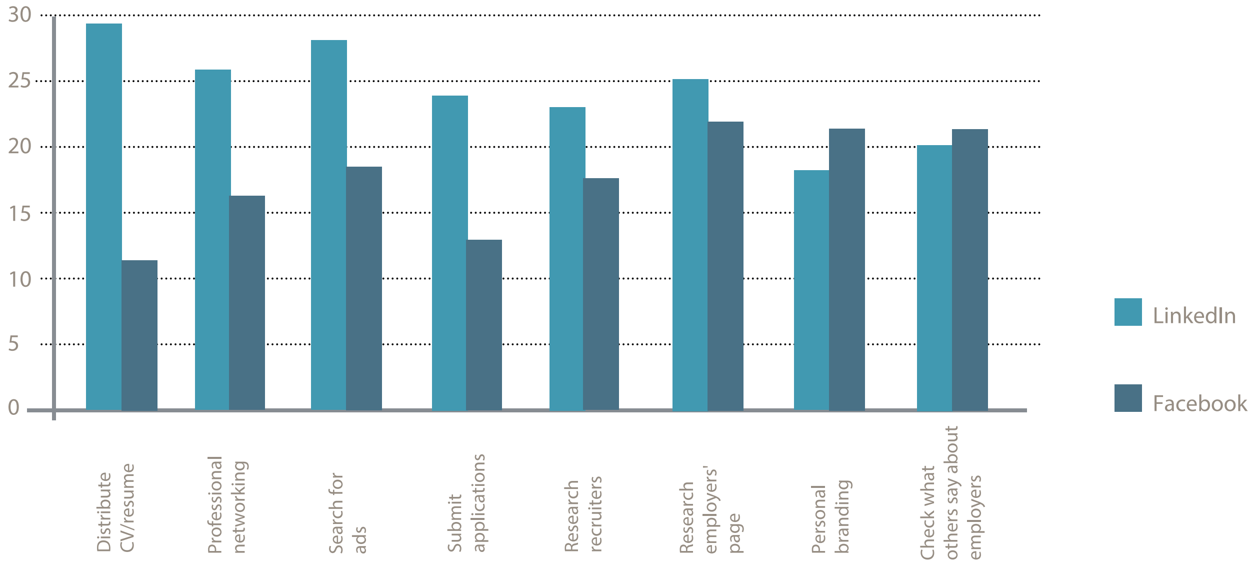
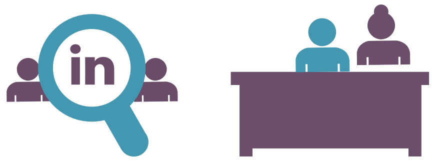


Figure 3

WHAT DO RECRUITERS USE SOCIAL NETWORKS FOR?

A shift in behaviour can be seen among recruiters as they consider Facebook to be more and more an equal platform to LinkedIn with regards to personal branding, checking a candidate's online reputation and understanding their personality. Overall, LinkedIn remains the recruiters' favourite platform for any activity. Since these activities are focused on reputation and, more in general, on relationships, Facebook becomes very relevant also for professional aspects.



Do you use these platforms for the following activities?
(Recruiters)

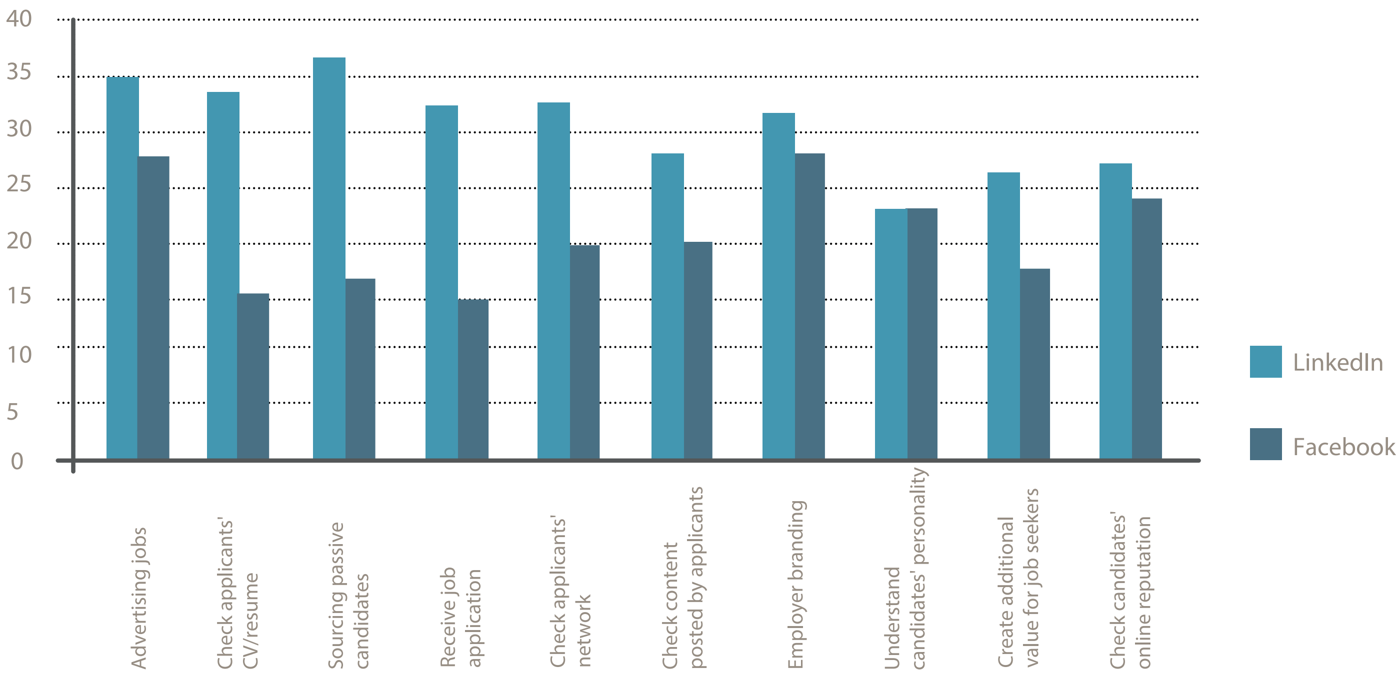


Figure 4

WHAT DO RECRUITERS AND JOB SEEKERS USE SOCIAL NETWORKS FOR?

> **"41% of recruiters actively produce digital content"**

29% post content directly on their own LinkedIn profile, 19% post regularly on their company's blog or website, 6% have personal blogs and 5% post content on their personal website.

> 18% of job seekers have blogs

12% for exclusively personal reasons. Keeping a professional blog (3%), or a combined personal/professional blog (3%) is less common, even though, as we highlight below, this becomes a determining factor in the effectiveness of the search for work.

> 22% of job seekers refer to a personal digital profile in their CVs

Of these, 63% link to their LinkedIn profiles, 31% to their Facebook profiles, 20% to their blogs and 11% to their Twitter profiles.

Most of these are men (27% vs 19% women), with a certificate of higher education (31% have a bachelor's degree and 44% have a master's / doctorate degree).

Thus, the higher the level of education, the more likely it is that the job seeker is an active online user and that online networks are a means to find a job.

It is less common in Central European countries to include a link to a personal social profile in the CV (16%) than in other regions (31% Eastern European Countries, 32% Americas and 34% Asia).

WHAT PERCENTAGE OF JOB SEEKING AND RECRUITING HAPPENS ONLINE?

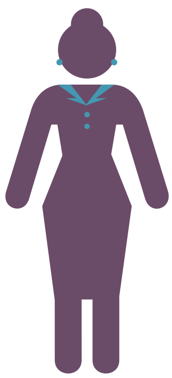
> 73% of job seeking happens online

> 55% of recruitment happens online

On average, candidates do 73% of job seeking activities online, while recruiters only carry out 55% of their overall recruitment activities online. For 2016, recruiters expect that 56% of their overall recruitment activities will take place online.

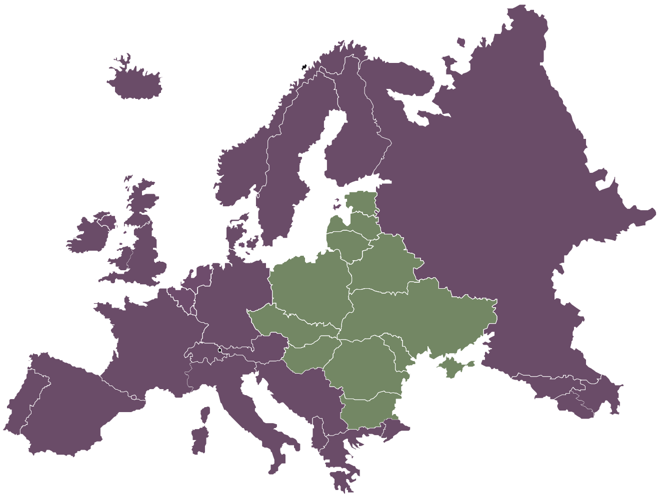
Educated females are the most active online job seekers

Among job seekers, the amount of activity dedicated to seeking work online rises among women (+4%) and grows progressively as the level of education rises (+22%) among those with at least a university degree, among people with LinkedIn profiles (+13% compared to those who do not use LinkedIn) or a professional blog (+5%).



Online job seeking is highest in Eastern European Countries

In general, Eastern European countries are more active online in job search compared to other regions (+8% compared to Central Europe and +9% for Asia and the Americas).



Percentage of total job search on the internet
geographic area (Job Seekers)

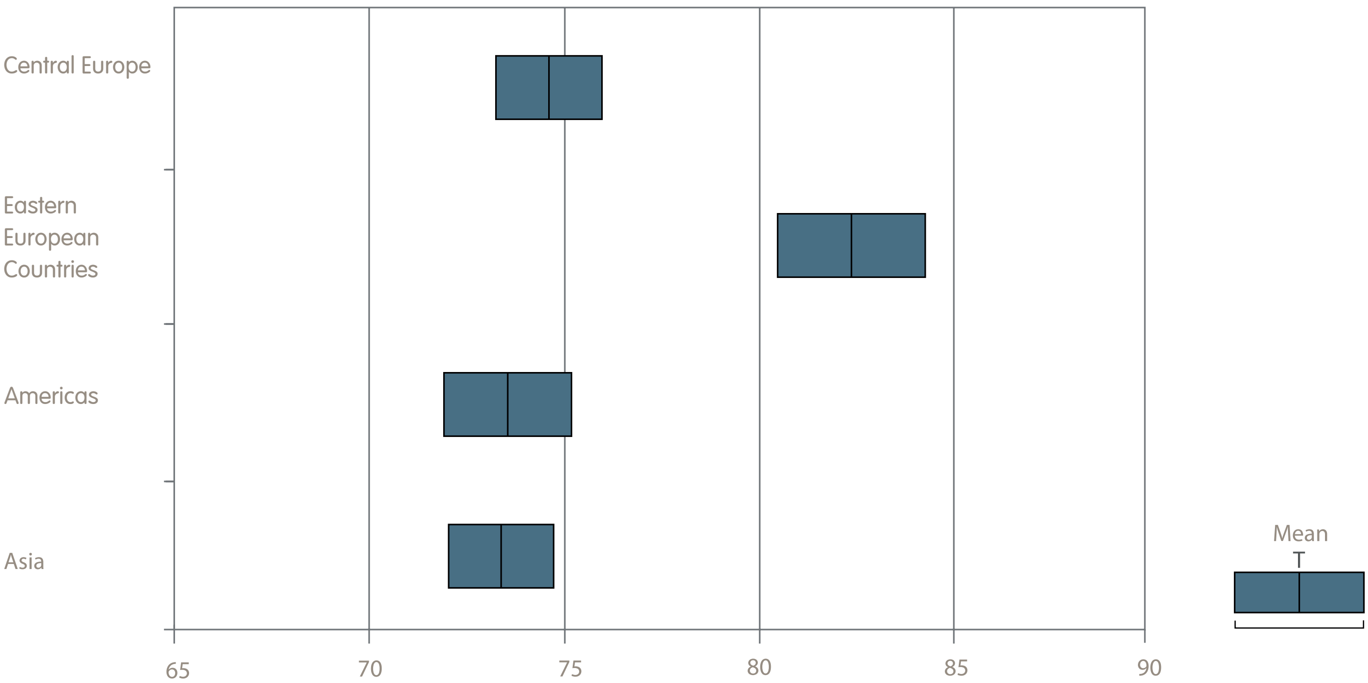


Figure 5

Online recruiting is highest in the Americas

When recruiters were asked about their recruitment activity in 2015, the Americas spent the most time online, 19% more than recruiters in Central Europe and 16% more than in Asia. In the outlook for 2016 all recruiters see an equally increasing trend towards more activities performed online, in accordance with the time spent online in 2015.

Percentage of total job search on the internet
geographic area (Job Seekers)

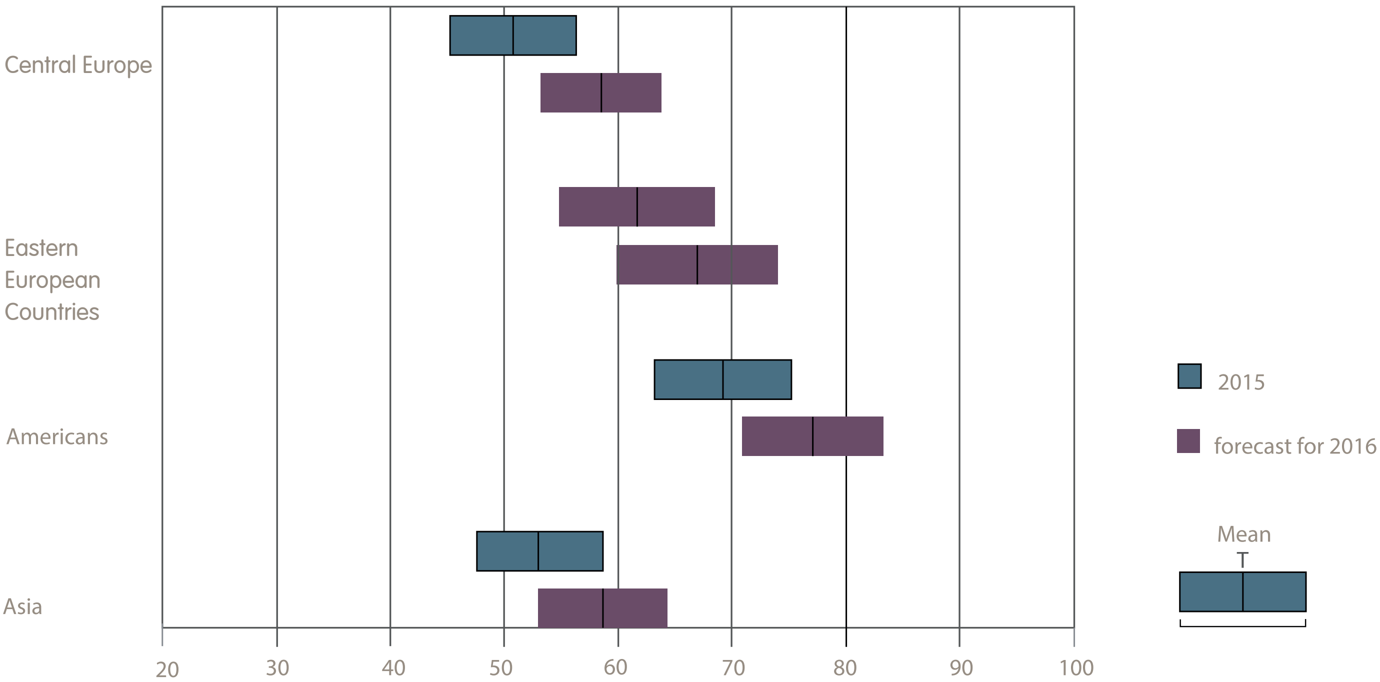


Figure 6

WHAT ARE THE MOST POPULAR RECRUITMENT CHANNELS?

> **“61% of job seekers and 49% of recruiters prefer online job boards and recruiting sites over social media pages.”**

31% of recruiters and 25% of job seekers will use a/their corporate website. Social media pages are least favoured: only 20% of job seekers and 15% of recruiters will use them.

For the coming year, recruiters foresee that career sections will remain stable, but job boards will lose five percentage points in favour of social media.

> **In 2016 recruiters expect job boards to lose 5% of importance in favour of social media.**

Asian job seekers and Central European recruiters prefer corporate websites.

Central European job seekers and American recruiters prefer job boards and online recruiting pages.

Social media is preferred by American job seekers and recruiters from Eastern European Countries.

What percentage of your total job search/recruitment activity involves the Internet? (Job seekers vs Recruiters)

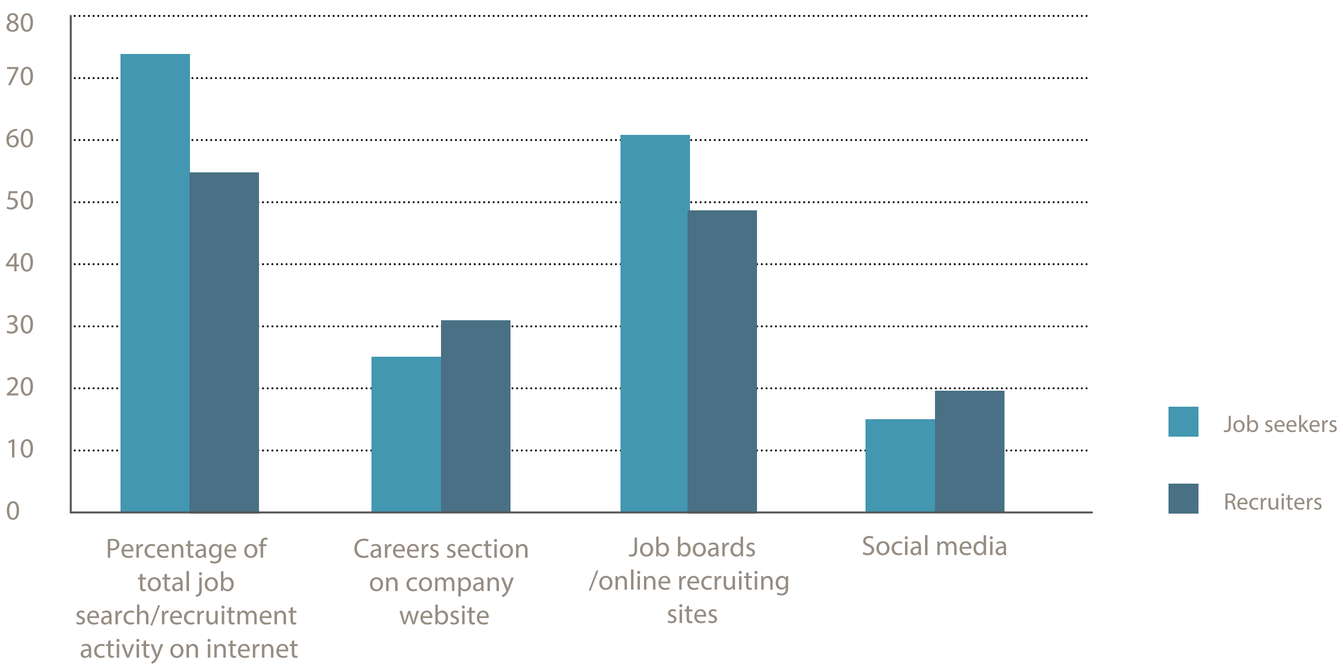


Figure 7

> **65% of job seekers use a mobile device for online job seeking**

Job seekers are more 'mobile' than recruiters

65% of job seekers frequently (32%) or sometimes (33%) use a mobile device for online job seeking, while for recruiters in the search and match process, this figure drops to 41% (often 13%, sometimes 28%). 18% of recruiters use LinkedIn licences, and 9% have a LinkedIn premium membership. Recruiters with licences are performing social recruiting activities much more often.

Online recruiting focuses on more senior and permanent roles

> **47% of recruiters use combined online and offline searching**

For recruiters, a combination of online and offline activities works best in most cases (47%). The positions they are trying to fill through online recruitment are mostly middle and senior management positions which are most likely permanent positions rather than temporary roles. The sectors most looked for through online recruitment activities are IT, research and development, controlling, accounting & finance, corporate communication & PR. Roles in manufacturing and logistics are less likely to be filled through online activities.

What kind of candidate profiles do you search for and using which channels?
(Recruiters)

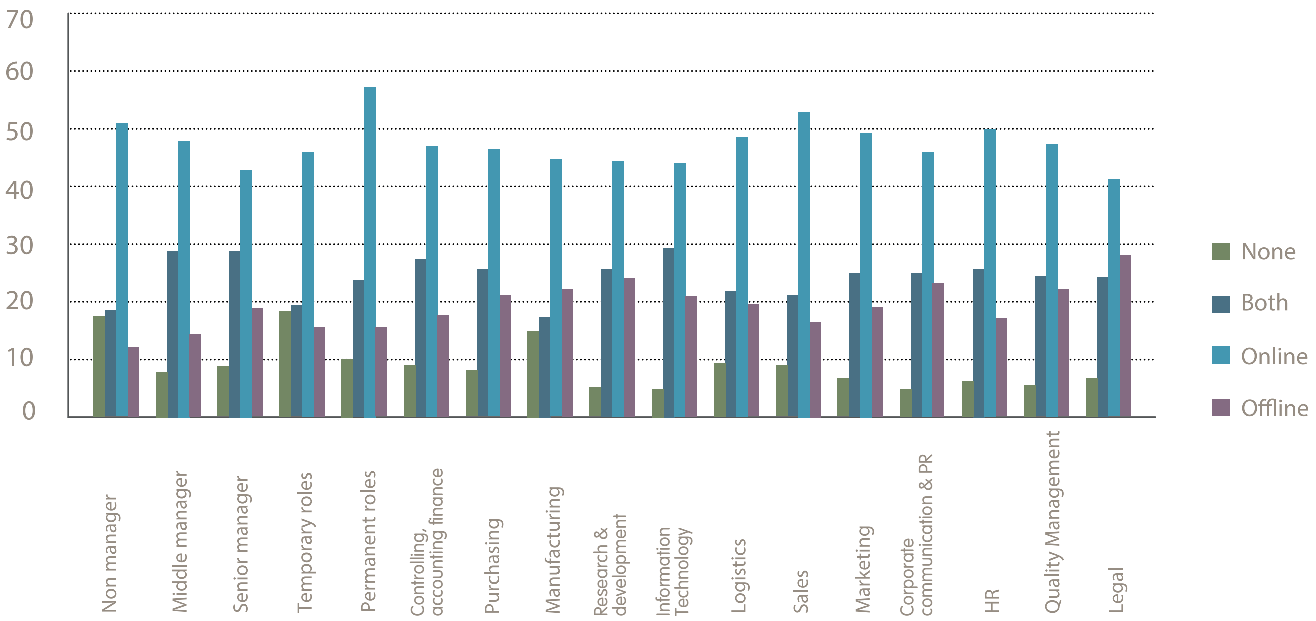


Figure 8

PART 2 – ONLINE REPUTATION

HOW ARE RECRUITERS AND JOB SEEKERS USING ONLINE DATA?

> **32% of recruiters say they ask candidates about their presence on social media.**
>
> **28% of recruiters say they have rejected at least one candidate because of content available online pertaining to the candidate.**

The request for information about online behaviour is more common in large companies: 35% of recruiters working for corporations vs 28% among those working for small companies request information about a candidate's online behaviour.

Among recruiters who are more active on social media: the number of social networks used, activities performed on social networks and time invested in online searching has increased.

Social recruiting is more frequent in Asian countries (42%) and in Eastern European Countries (36%) than in the Americas (28%) and Central Europe (24%).

A similar geographical distribution can be seen also with respect to excluding candidates due to online content about them: 34% Eastern European countries, 33% Asia, 31% Americas and only 19% Central Europe.

The most frequent reasons for rejection are the presence of information that contradicts the CV (54% of those who had excluded a candidate for digital content), an assessment of personality traits (49%) and posting of improper or inadequate images (46%). On the other hand, the presence of political opinions expressed by candidates (11%) proved to be irrelevant to recruiters and discriminatory content was deemed marginally relevant (27%).

Have you ever asked a candidate about his/her social media presence / Have you ever excluded a candidate from the recruitment process because of online information Geographical area (Recruiters)

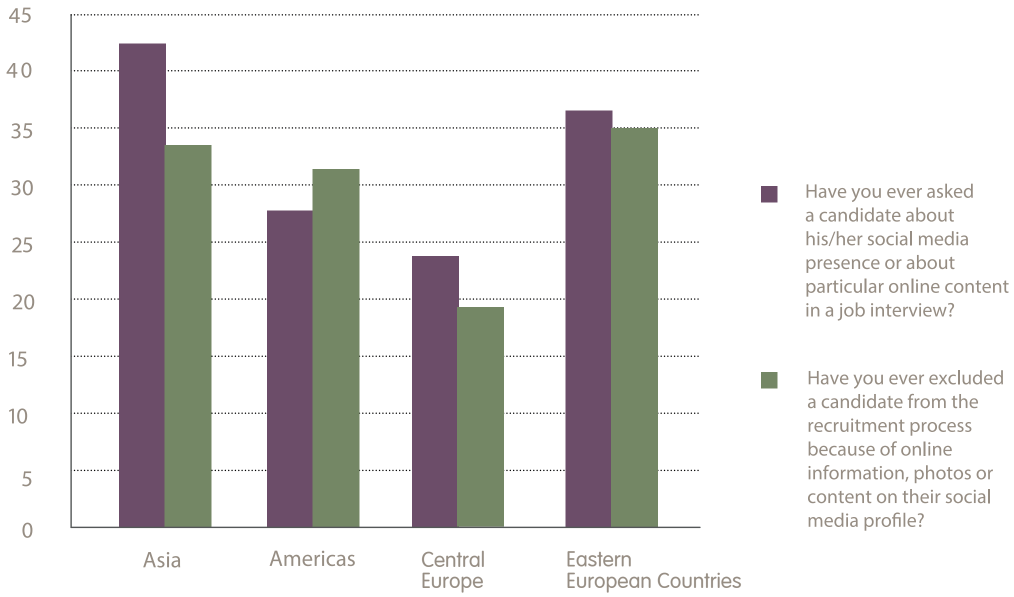


Figure 9

REASONS FOR REJECTING CANDIDATES

1. Information that contradicts the candidate's CV (54%)
2. An assessment of personality traits (49%)
3. Improper or inadequate images (46%)
4. Discriminatory content (27%)
5. Political opinions expressed by candidates (11%)

JOB SEEKERS USING THE WEB TO EVALUATE COMPANIES

An interesting point is the fact that job seekers also use the web to evaluate the reputations of companies: 72% of those asked said that they search on Google or similar sites, about 10% use specific platforms for this type of research, such as Glassdoor or Kununu. More limited, was the percentage of people claiming to have written reviews of a company through one of these platforms (1.7%).

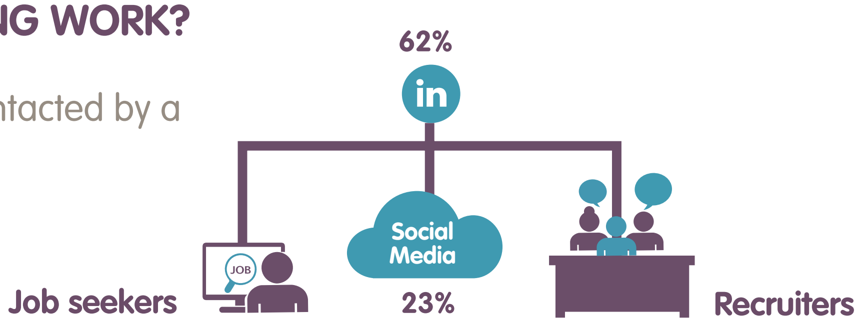
> "72% of job seekers use the web to evaluate company reputations"

PART 3 – EFFICIENCY OF SOCIAL RECRUITING

DOES SOCIAL RECRUITING WORK?

23% of job seekers have been contacted by a recruiter through social media.

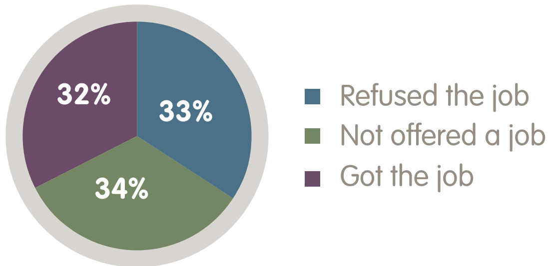
62% of these were contacted via LinkedIn.



23% of job seekers interviewed were contacted by a recruiter through social media. Of these, always as a percentage of the total, 16% set up an interview, and 6% turned down the offer of an interview, while 6% got the job.

The most popular social network for this activity was LinkedIn: 62% of those who received an invitation for an interview were contacted through this social network, while 36% were contacted through Facebook.

In relation to an actual job offer after the interview, the data provided shows an almost perfect 3-way split: 32% of those who went to an interview got the job, 33% were offered a job but refused, and 34% were not offered a job.



The candidates getting interviews through social media are mainly people with a university or high school diploma (11% high school, 26% college degree and 37% masters or doctoral degree) and who work in areas that use digital technology (25% human resources, 24% ICT, 20% business and administration).

Men tend to receive more interviews through social media, as well as candidates between the age of 30-40 years, but with fewer significant differences. Even geographical differences are less important: contact through social media is more common in Eastern European Countries (+2%), Asia (+2%) and the Americas (+1%) than in Central Europe.

The data shows a strong connection between the candidate's active online search for work and the results achieved. The probability of being contacted by a recruiter increases with the number of social networks used (from 16% for those using one network to 46% for those using all offive main platforms).

Candidates who attended an interview have carried out an average of 12% more job search activities online than those who did not receive contacts and +4.5% compared to those who had turned down an interview.

BLOGGING

> Blogging matters: of the job seekers who accepted interviews, 34% had personal and professional blogs, 30% had a professional blog, 21% had a personal blog

Candidates who included their online profiles on their CV are also more likely to be contacted (35% of those indicating their LinkedIn profile on their CV were contacted as opposed to only 9% of those who did not).

Social media is also used by recruiters to contact candidates who say they are not looking for work but are open to job offers. These candidates are more likely to obtain interviews than those actively job seeking (20% vs 16%). Social recruiting is more effective for job seekers who are more active online professionally.

Are you currently looking for a job?
Have you ever been contacted by a recruiter through social media? (Job Seekers)

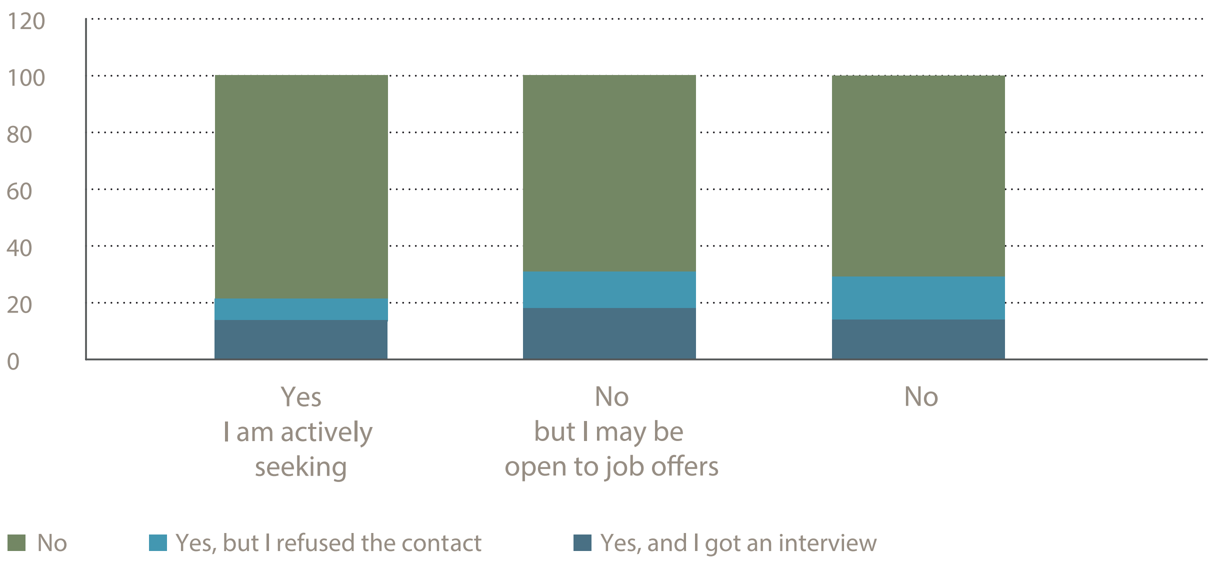


Figure 10

MEASURING THE EFFECTIVENESS OF SOCIAL RECRUITING

For recruiters, the career section on their company's website (31%) and job boards (49%) were more important than social media (20%) for recruiting activities. This is also reflected in their perceived efficiency of digital channels. When recruiters do make use of social recruiting, they rarely measure and monitor their activities:

46% do not monitor their social networking activities in any way. At the moment, the most significant KPIs are the number of candidates per social network (31%), the number of new connections (25%), the number of clicks per job (23%) and the return on investment per placement (23%).

> **“ 46% of recruiters do not monitor their social media activities in any way ”**

PART 4 – KNOWLEDGE ABOUT SMARTWORKING

DO PEOPLE UNDERSTAND WHAT SMARTWORKING IS?

Smartworking is a concept that not many workers know about presently: 69% of job seekers and 45% of recruiters say they have never heard of it.

> **“69% of job seekers and 45% of recruiters say they have never heard of smartworking”**

Differences are not pronounced among the different age groups, but as far as geographical areas are concerned, the countries that present a greater percentage of people who are not familiar with the idea of smartworking are Central European (76% of job seekers and 52% of recruiters) and Eastern European Countries (64% of job seekers and 54% of recruiters).

The highest level of awareness is found in Asian countries, where the number of people interviewed who state they are not be familiar with smartworking falls to 32% among recruiters and 40% among job seekers.

> **“The highest level of awareness about smartworking is found in Asian countries”**

In general, among those who know about smartworking, most of them define it as flexibility of working time (37% recruiters, 20% job seekers), in particular in Asian countries (45% recruiters, 44% job seekers) and the Americas (42% recruiters, 27% job seekers) and flexibility of workplace (33% recruiters, 18% job seekers), with a large gap between those that define it as flexibility in work methods (focus on deliverables: 28% recruiters; 16% job seekers) and work tools (bring own device policy: 14% recruiters; 12% job seekers).

Have you ever heard about smartworking?
(Job seekers vs Recruiters)

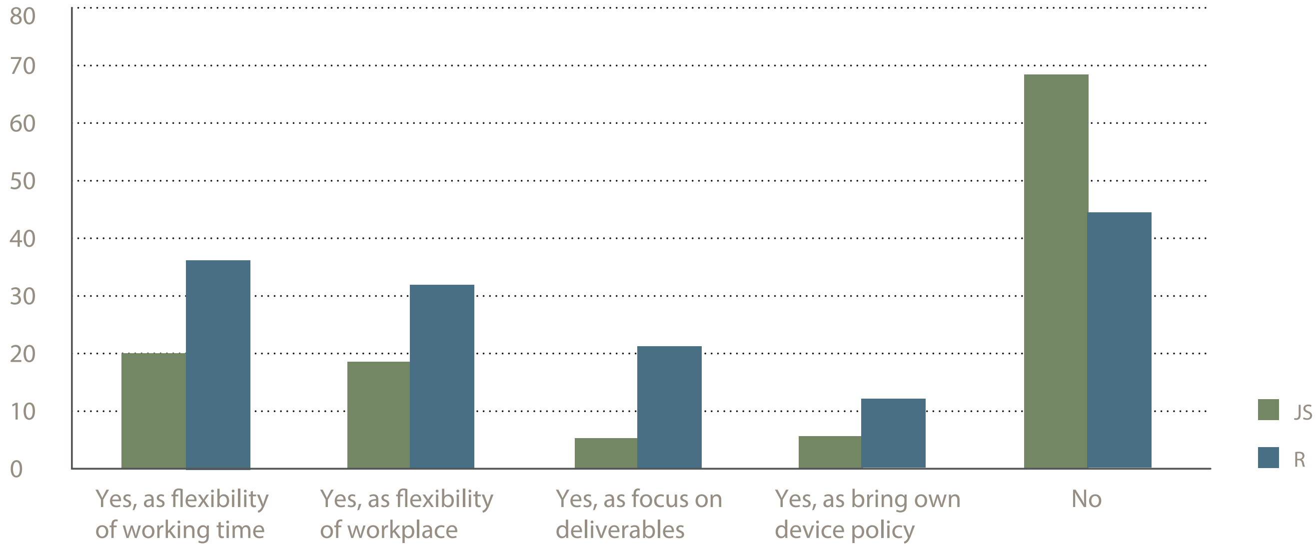


Figure 11

DO PEOPLE UNDERSTAND WHAT 'COWORKING' IS?

The percentage of people interviewed who had never heard of coworking is lower but still significant (49% of job seekers and 38% of recruiters), to which is added the number of those who have heard of it but do not know what it involves (34% of job seekers and 33% of recruiters). Among job seekers, 9% have visited a space and 7% have worked in a space, while 15% of recruiters have visited coworking offices, 4% have worked inside one of these spaces and 5% have opened a coworking office.

49% of job seekers and 38% of recruiters have never heard of coworking.

It is interesting to see that the experience with co-working has no relation to age and gender. From a geographical standpoint, however, the results are aligned with those for smartworking: Central Europe presents a higher percentage of participants in the study who do not know the meaning of the word coworking (56% job seekers, 41% recruiters), compared to Eastern Countries (42% job seekers, 38% recruiters), Asia (38% job seekers, 39% recruiters) and the Americas (37% job seekers, 39% recruiters).

HOW PREVALENT IS FLEXIBLE WORKING?

As indicated earlier, many participants are not familiar with the terminology of smartworking. This is also reflected when looking at where participants are working and how flexible they are at choosing their location of work: most people who were interviewed had never worked from home (62% job seekers, 46% recruiters), from a co-working space (70% job seekers, 90% recruiters) or while on the move (68% job seekers, 77% recruiters).

Europe is the area where there is the lowest number of job seekers who have tried forms of smartworking, in particular working at a coworking office (6% vs an average of 30%) and working on the move (6% vs an average of 32%).

It is also interesting to note that the level of experimentation for work location flexibility increases with the candidate's level of education and decreases with age. In particular, regarding working from home and using coworking spaces, respectively 34% and 16% of participants over 50 years of age declare to have never tried these forms of remote working, compared to 43% and 39% of participants between 25 and 39 years of age. 24% of participants with a high school diploma say they have experienced workplace mobility (compared to 46% of college graduates), while 29% with a high school diploma say they have worked from home (vs 38% of college graduates).

16% of workers aged over 50 say they have never tried coworking, compared to 39% of those aged between 25 and 39.

Generally speaking, these results show that workplace flexibility is still not a consolidated practice, even though a percentage of younger employees with a higher level of education have started experimenting with it.

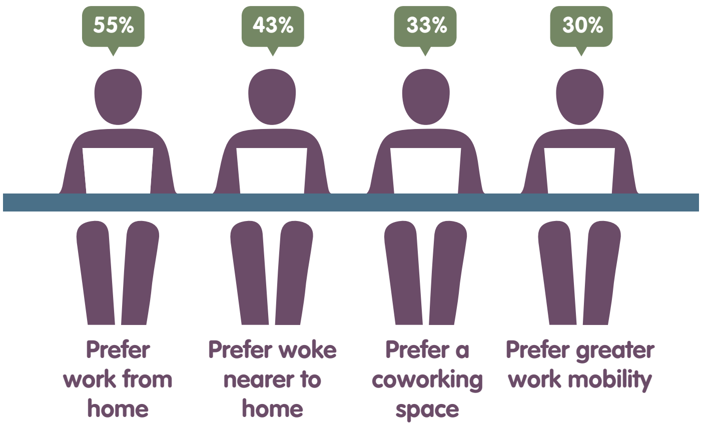
Part 5 - SMARTWORKING PREFERENCES AND OPINIONS

Over half, 55% of job seekers would like to work from home.

43% would prefer an office nearer to their homes.

33% would like to work in a coworking space.

30% would like to work while on the move.



Would you like to work outside your office?
Gender (Job seekers)

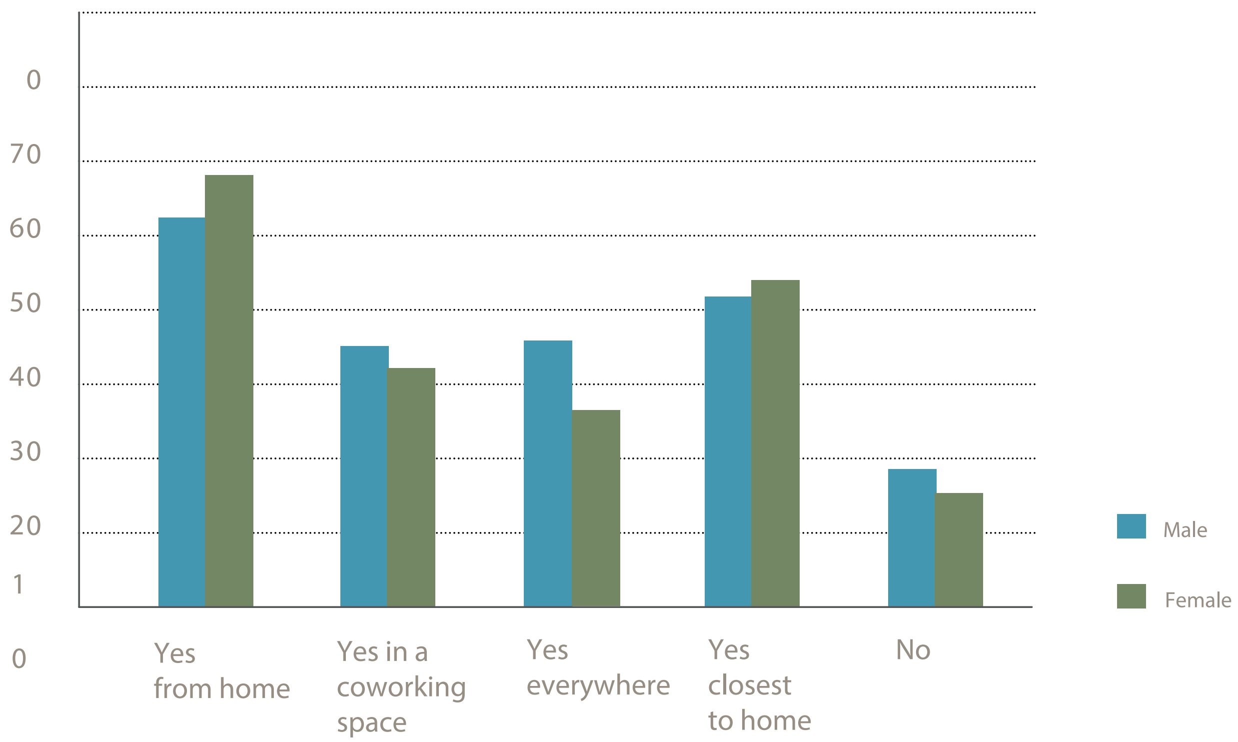


Figure 12

WHAT ARE THE DEMOGRAPHICS OF SMARTWORKING?

The study revealed a preference among women for working from home (58% vs 53% men) and among men for working while on the move (36% vs 26% women).

The tendency to work outside the office is higher up to the age of 39 (with a peak between 30 and 34), and then decreases progressively as age increases.

Among the options offered, coworking and working in mobility are chosen by the younger workers as an alternative to working from home.

> **“ 92% of people who have experienced smartworking are interested in experimenting with work flexibility ”**

Those who have already had experience with smartworking say they are more interested than others in experimenting with these forms of work flexibility (92% vs 80%). In particular, in more innovative spaces. There is a 14% increase in the willingness to work from a coworking office, an 11% increase in willingness to work while on the move, a 7% increase in the desire to work from home and a 2% in the willingness to have company offices nearer to their homes.

Would you like to work outside your office?
Age (Job Seekers)

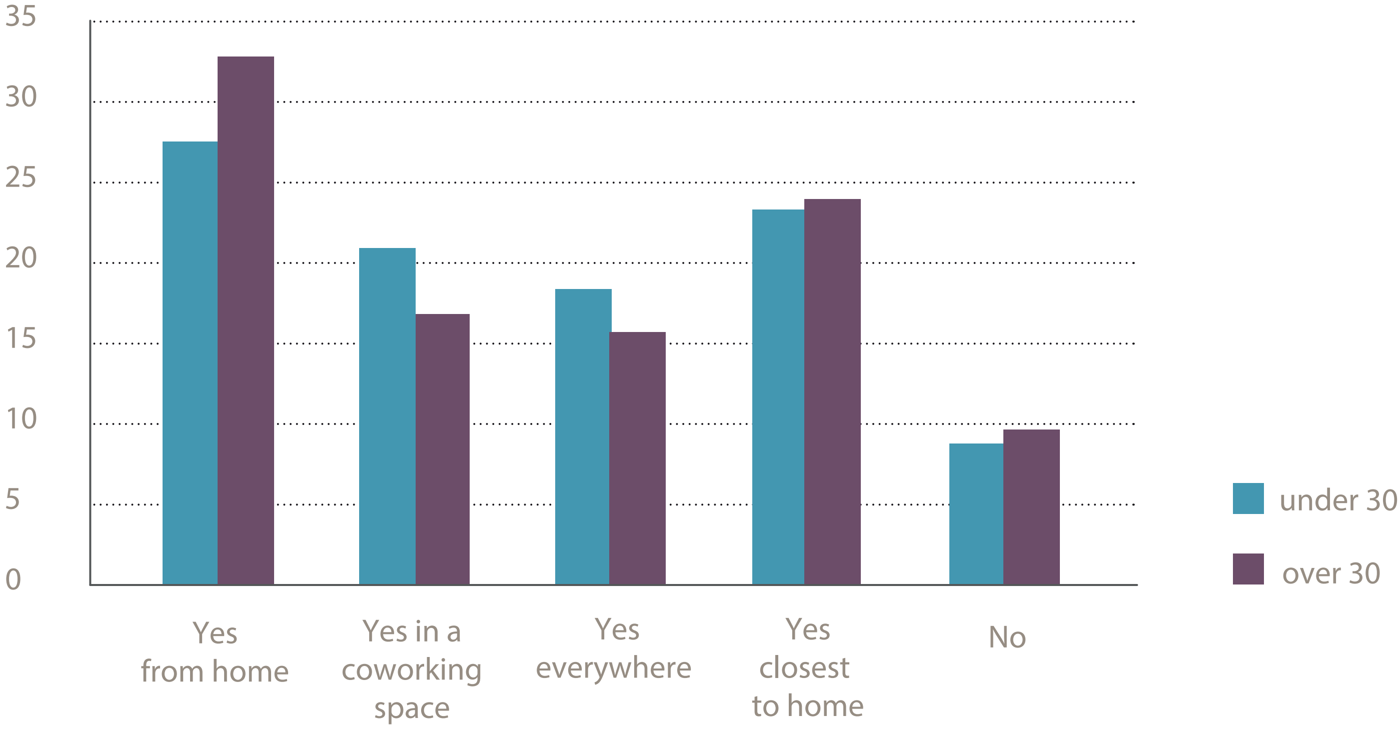


Figure 13

THE GEOGRAPHICAL PREFERENCES OF SMARTWORKING

If we analyse the answers to this question on the basis of geographic areas, job seekers from the Americas are the most willing to work from outside the office (93%), followed by Asian countries (92%) and Eastern European Countries (89%), while Central Europe is at the bottom of the list with a significant difference (77%).

> 93% of people in the Americas are willing to work from outside the office, compared to just 77% in Central Europe.

Working from home or on the move was preferred mainly in Asian and Eastern Countries. Co-working and corporate offices closer to home were most popular in the Americas.

Would you like to work outside your office?
Geographical area (job seekers)

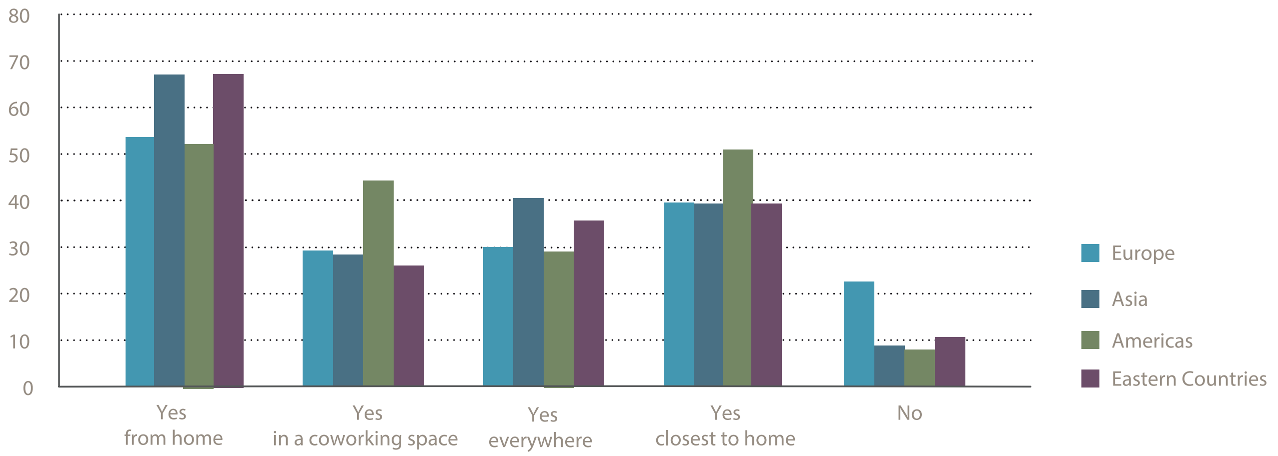


Figure 14

WHAT ARE THE MOST SUITABLE PLACES FOR SMARTWORKING?

Recruiters attribute greater significance to co-working spaces compared to the branch/ office that is closest to the worker's home - and, generally, are more cautious than job seekers in appreciating these solutions: Among workplaces thought most suitable for prospective candidates, the most popular option was mainly the home (23% recruiters vs 55% job seekers), followed by co-working offices (22% recruiters vs 33% job seekers), company offices near employees' homes (21% recruiters vs 43% job seekers) and working on the move (18% recruiters vs 31% job seekers).

Most suitable place for smartworking
(Job seekers vs recruiters)

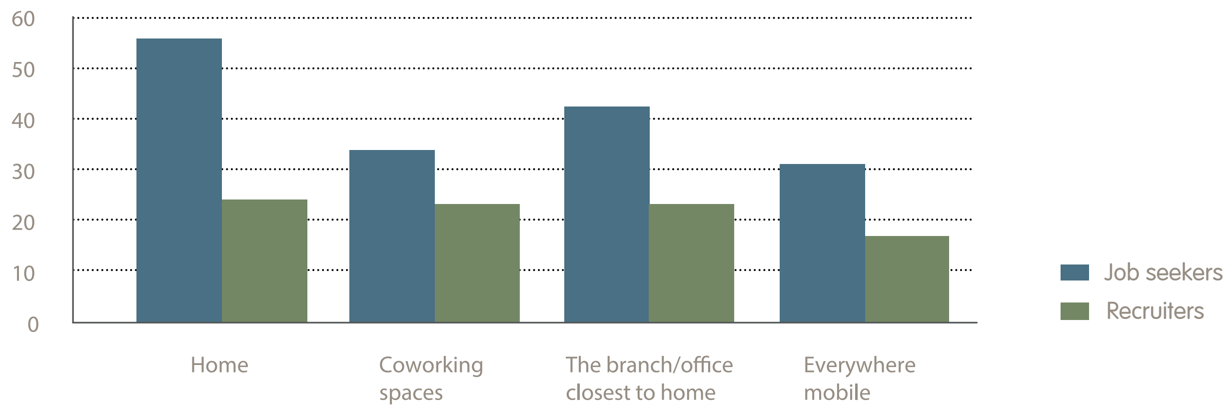


Figure 15

WHAT ARE THE MAIN ADVANTAGES OF SMARTWORKING?

Candidates interviewed said they wanted to work outside the office for 54% of their total work time, while recruiters felt that the optimal percentage of work time outside the office was 35%.

> **"Candidates want to work outside the office for 54% of their time. For recruiters this percentage falls to just 35%"**

Job seekers who have already tried working from home would like to spend 5% more of their work time out of the office, compared to those who have never had this experience.

Recruiters felt that the advantages of smartworking outweigh the disadvantages for workers (87% vs 13%) and employers (69% vs 31%), with greater advantages for workers. 74% also felt that smartworking could increase the effectiveness of the matching demand and supply in the job market.

> **"87% of recruiters feel the advantages of smartworking outweigh the disadvantages for workers"**

Among job seekers who declared their interest in flexible solutions, the main motivation mentioned by over half of participants is the possibility of organising work time independently, a factor that recruiters do not consider to be significant. On the other hand, they agree on the other advantages: improving work-life balance and reducing time and costs of commuting. Relational aspects are considered less important: developing relationships with neighbours, reducing conflicts with colleagues and supervisors, and sharing knowledge with non-colleagues.

Main advantages of smartworking
Ranking (job seekers vs recruiters)

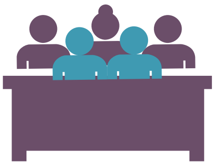
	Job Seekers	Recruiters
Less commuting time	3	2
Lower commuting costs	4	5
Work-life balance	2	1
Increased productivity	5	3
Increased relationship with neighbours	9	9
Fewer conflicts with colleagues and supervisor	8	8
Organize my working time independently	1	4
Sharing skills with non-colleagues	7	7
More creativity and innovative approaches	6	6

Figure 16

WHAT ARE THE MAIN REASONS FOR SMARTWORKING?

It is interesting to see that people choose to work from home mainly for organisational reasons while they choose coworking and working on the move mainly for professional reasons.

Reasons for smartworking:
Reduce commute time and costs, work-life balance, independent organisation of work time.



Reasons for coworking:
Higher accountability since results are more important than time spent in the office, sharing knowledge with non-colleagues, more creative and innovative approaches, increases in productivity.

Only 17% of job seekers refuse these options of flexibility: the main reasons they use to justify this resistance are the lack of an opportunity to interact with colleagues, difficulty in managing work-life balance and the risk of more distractions.

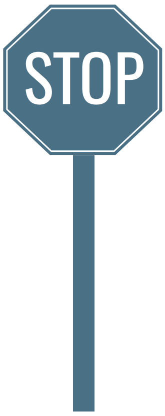
Recruiters see different disadvantages in smartworking solutions than job seekers. The ones most mentioned by recruiters were strongly related to social aspects of the work environment: perception of isolation, reduction of interaction with colleagues and difficulty in sharing the corporate culture. In particular, recruiters seem to under-estimate the difficulties in reconciling professional and personal life through smartworking solutions, maybe because they consider smartworking solutions to be better integrated in a corporate office than in the home environment.

Main advantages of smartworking
Ranking (job seekers vs recruiters)

	Job Seekers	Recruiters
Difficulty in using technology	6	6
Possible isolation	4	1
More distractions	3	4
Worse work life balance	2	10
Increased workload	8	8
Missing career opportunities	7	9
Difficulties in sharing the company culture	10	3
Difficulties in sharing objectives and strategies	11	7
Fewer chances to interact with colleagues	1	2
Fewer chances to interact with supervisors	5	5
Lower level of creativity and innovative approaches	9	11

Figure 17

WHAT ARE THE BARRIERS TO SMARTWORKING?



The greatest barriers identified by recruiters in the adoption of smartworking are:

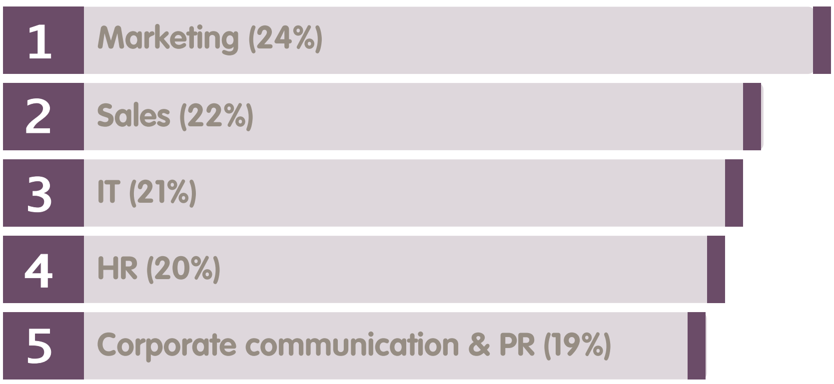
- Corporate structure and organisation (25%)
- The lack of training in virtual management (21%)
- Lack of knowledge of new technologies (17%)
- Lack of knowledge of performance assessment management alignment (16%)
- Lack of availability of adequate workspaces (9%)

There was no significant difference noted for job seekers actively searching for a job in relation to gender or age. Women tend to be more concerned about potential isolation and having fewer chances to interact with colleagues and men tend to be more concerned about losing creativity and innovation.

With regard to age, it is interesting to see a higher level of concern among very young workers (under 24), probably caused by limited knowledge about the job market and awareness of their own abilities, which reduces in the middle age range and starts to climb again at the age of 40. The main differences are seen on a geographical level: Central European job seekers show a higher level of worry across the board.

Recruiters feel that smartworking is more suited to middle (49%) and senior managers (46%) compared to non-managerial roles (27%) and for permanent positions (35%) as opposed to temporary (25%) or part-time (23%) roles.

Departments that feel they would benefit most from smartworking are:



Those believed to be the least suitable are production (6%) and logistics (7%). It is interesting to see that these are the same positions that they feel are most suitable for social recruiting.

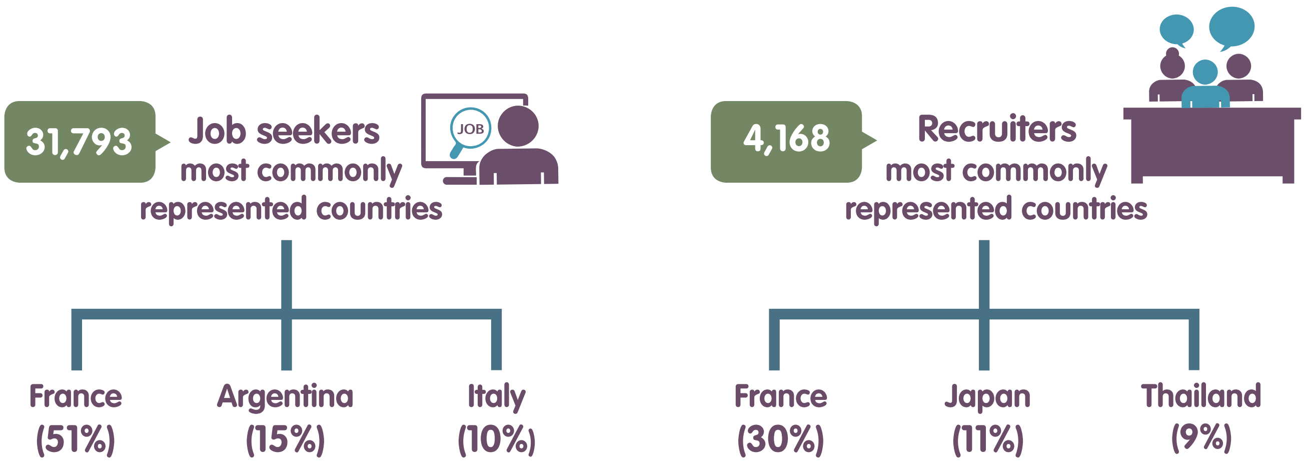
The three main categories for which smartworking is considered to be particularly suitable are qualified workers who live very far from their workplace (53%, while disabled workers is at 40%), workers with childcare responsibilities (50%, while workers with elderly care responsibility falls to 41%) and women (48%, while men figure at 37%).

Lastly, concerning work tools, the job seekers interviewed are divided into two equal categories: those who accept working with tools provided by their employer and those who want to choose their own tools. Those that want to choose their own tools are mostly men, between the age of 25 and 35. They have a higher level of education and are mostly resident in Eastern European countries.

PART 6 – PROFILE OF INTERVIEWED PARTICIPANTS

The sample involved 31,793 job seekers, of whom 23,085 filled out the questionnaire completely (73%) and 4,168 recruiters (1,825, equal 44%, full compilers).

Among job seekers, the most represented countries are France (51%), Argentina (15%) and Italy (10%); among recruiters, France (30%), Japan (11%) and Thailand (9%).



Comparative analyses of geographical areas were adjusted using two auxiliary variables to improve how representative the samples of job seekers and recruiters are compared to the real population of the four macro-areas considered (Central Europe, Americas, Asia, Eastern European Countries). We started from the assumption that individuals

residing in different countries of the same geographical macro-area all had the same opportunities to participate in the study. Then we created two distinct auxiliary variables with different weights for the groups of job seekers and recruiters (Tab 1 and 2). The value of each weight derives from the real size of the population of macro-area X and the quota of interviewed participants out of the total of the group that resides in the same macro-area (X).

For example, the auxiliary variable for job seekers residing in Central Europe acquires a value equal to:

$$\left(\frac{296{,}340{,}241}{3{,}929{,}978\times 161}\times 100\right) / \left(\frac{17{,}670\times 100}{26{,}794\times 100}\right) = \frac{7.54}{65.95} = 0.114$$

Geographical weights for the job seekers' sample

Country		N	%	Sampling weight
Central Europe	Sample	17,670	65.95	0.114
	Population	296,340,241	7.54	
Asia	Sample	994	3.71	19.417
	Population	2,830,997,606	72.04	
Americas	Sample	6,169	23.02	0.536
	Population	484,491,800	12.33	
Eastern European Countries	Sample	1961	7.32	1.106
	Population	318,148,514	8.095	
Total	Sample	26,794	100	1
	Population	3,929,978,161	100	

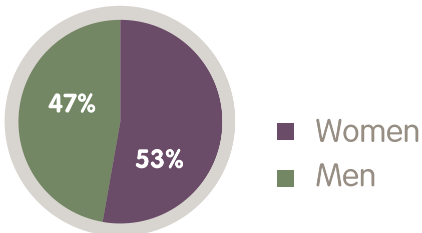
Figure 18

Geographical weights for the recruiters' sample

Country		N	%	Sampling weight
Central Europe	Sample	1,130	52.71	0.165
	Population	205,279,102	8.72	
Asia	Sample	615	28.69	2.141
	Population	1,446,734,016	61.42	
Americas	Sample	178	8.3	2.478
	Population	484,491,800	20.57	
Eastern European Countries	Sample	221	10.3	0.902
	Population	218,860,783	9.29	
Total	Sample	26,794	100	1
	Population	3,929,978,161	100	

Figure 19

Out of the total interviewed candidates, 53% were women and 47% men.



In terms of age, the group most represented was candidates born between 1980 and 1989 (33% of the total) followed by the groups that immediately follow (between 1990 and 1997) and those that immediately precede (between 1970 and 1979), which are around 22%. 40% of the interviewed participants have children. In terms of level of education, almost half the sample have at least two or three years of university level education (47%), while 20% have a specialist degree and 7% have a masters degree or research doctorate. 24% have never been to university and 3% do not have a high school diploma. The field best
represented is Business Administration and Law (19%) followed by Engineering (12%) and ICT (7%).

61% of interviewees have less than 10 years work experience. Among these, 14% have less than one year of experience, 13% have between one and two years experience, 17% have between 3 and 5 years experience and another 17% have between 6 and 10 years of experience.

The remaining 39% is divided equally between participants with 11 to 20 years of experience (46%) and those that have over 20 years of experience (54%).

The unemployed account for 40% of participants, to which another 7% who say they are looking for their first job are added. 27% of interviewees have a full time job, 9% work part time and 4% are full time students. The number of independent/autonomous/freelance workers out of the total is 4%. Therefore, we have a young sample with homogeneous skills – which tend towards a high level – and with similar seniority, with a few years of professional experience.

73% of the sample say they have looked for work during the past year, while 10% say they have during the last two years. 5% of the sample has never looked for work before.

71% of the sample are actively seeking a job, and 21%, even though not actively seeking, are open to receiving offers. Only 6% of the sample group says that they are not looking for a job.

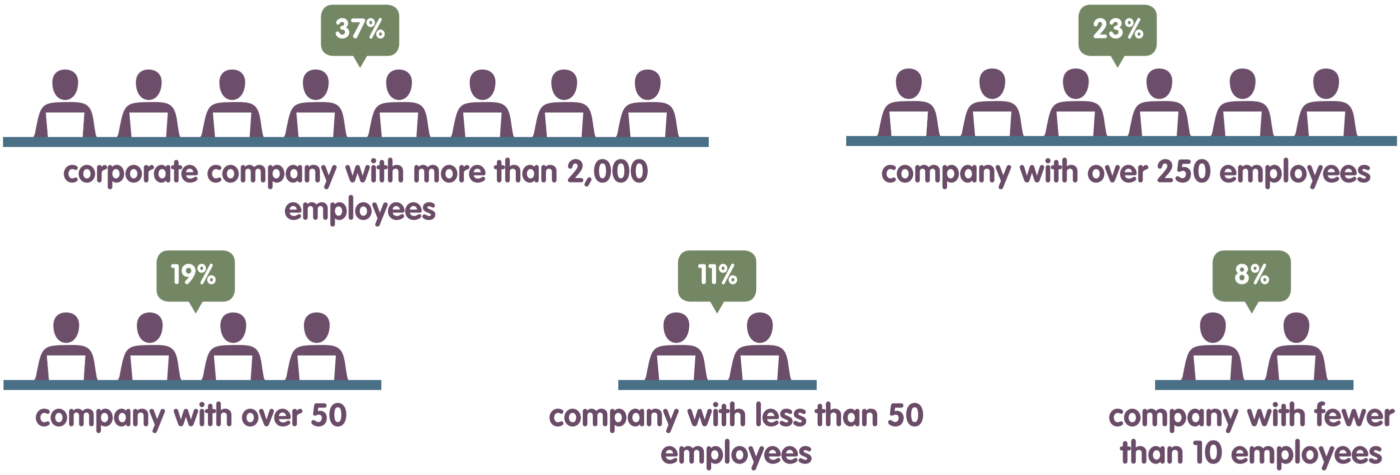
Among recruiters, 63% are men and 37% are women. With regard to age, the largest group (39%) were born between 1980 and 1989, while 34% were born between 1970 and 1979, 18% between 1960 and 1969, 9% after 1990 and 6% before 1960. 55% have at least one child. The countries best represented were France (28%), Japan (11%), Thailand (9%) and India (8%).

The level of education is high on average: 41% of interviewees have a university degree and 27% have a master's or doctorate; 25% have had a few years' university education; only 7% have a high school diploma and 0.92% do not have a high school diploma. The largest group of interviewees have a degree in a human resources area (34%) and Business, Administration and Law (18%). When considering professional experience as a recruiter, 24% have 3-5 years' experience and another 24% 5-10 year's, 21% have more than 10 years' experience and 8% have over 20 years' experience. Therefore we have a sample of experts of only 15% who say they have 1-2 years' experience and 7% with less than one year.

36% of interviewees work in companies that specifically handle human resources, with the rest of the sample distributed between other departments and sectors. 46% of interviewees hold a non-managerial position, 34% have a job in middle management and 19% hold a senior management position.

More than one third of the sample works in a corporate company with more than 2,000 employees (37%), while 23% work in a company with over 250 employees, 19% in a company with over 50 but less than 250 employees, 11% in a company with less than 50 employees and 8% in a company with fewer than 10 employees.

Therefore, the sample is comprehensively expert, highly qualified, and generally employed as recruiters in non-managerial or middle management positions in large sized companies.



THE RESEARCH TEAM

This study was designed by Silvia Zanella,Global Social Media & Online Marketing Director at Adecco Group, the world's leading provider of HR solutions. Her focus is on HR 2.0, with a strong interest in the future of work.

Julia Jachmann,Global Social Media Manager at Adecco Group, has coordinated the study. Her focus is on social media marketing, communication and recruiting.

This study was conducted by Ivana Pais, Assistant Professor of Economic Sociology at the Università Cattolica, Milan (Italy). Her research interest focuses on new ways of working through social media. Ivana Pais also coordinated the Adecco Global Social Recruiting Study in 2014.

The following people also collaborated on this study:
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APPENDIX

Participating Countries:

Central Europe:
Belgium, Finland, France, Italy, the Netherlands, Norway, Portugal, Spain, Switzerland, and the UK.

Asia:
Australia, China, India, Japan, and Thailand.

The Americas:
Argentina, Mexico, and the USA.

Eastern European Countries:
Bulgaria, the Czech Republic, Greece, Hungary, Poland, Romania, the Russian Federation, Slovenia, and Turkey.

Figure 1

	Facebook JS	Facebook R	YouTube JS	YouTube R	LinkedIn JS	LinkedIn R	Twitter JS	Twitter R
No	28.79	21.45	38.25	29.28	60.45	29.44	73.67	61.64
Yes for personal use only	46.97	46.97	46.81	57.52	56.73	5.16	9.43	20.23
Yes, professional use only	1.09	3.63	0.66	2.61	20.12	32.5	0.94	6.66
Yes, both	23.15	28.11	3.56	11.37	14.27	28.63	5.17	10.91

Figure 2

	Job Seekers	Recruiters
Central Europe	44.37	29.2
Asia	38.33	39.02
America	22.79	9.66
Eastern European Countries	26.52	9.59

Figure 3

	LinkedIn	Facebook
Distribute CV/resume	29.05	11.29
Professional networking	25.97	16.3
Search for ads	28.1	18.56
Submit applications	24.13	13.1
Research recruiters	23.25	17.09
Research employers' page	25.06	23.06
Personal branding	17.6	21.57
Check what others say about employers	20.32	21.72

Figure 4

	LinkedIn	Facebook
Advertising jobs	34.24	26.73
Check applicants' CV/resume	33.06	14.66
Sourcing passive candidates	35.94	16.07
Receive job application	31.69	13.92
Check applicant's network	32.2	18.79
Check content posted by applicants	27.5	19.07
Employer branding	31.17	27.18
Understand candidate's personality	22.38	22.12
Create additional value for job seekers	25.98	16.89
Check candidate's online reputation	26.49	22.96

Figure 7

	Job seekers	Recruiters
Percentage of total job search/recruitment activity on internet	73.9	54.7
Careers section on company website	24.8	31.5
Job boards/online recruiting sites	60.6	48.9
Social media	14.8	19.8

Figure 8

	Non manager	Middle manager	Senior manager	Temporary roles	Permanent roles	Controlling, accounting finance	Purchasing	Manufacturing	Research & development	Information Technology	Logistics	Sales	Marketing	Corporate communica- tion & PR	HR	Quality Management	Legal
Offline	17.61	8.3	9	18.51	10.25	7.19	6.06	15.08	5.15	4.99	9.51	9.1	5.96	5.05	6.4	5.59	6.68
Online	18.77	29.01	28.93	19.47	23.96	27.62	25.75	17.59	25.89	29.48	21.98	21.29	25.25	25.26	25.94	24.5	23.54
Both	51.31	48.1	43.01	46.33	57.52	47.26	46.82	44.89	44.67	44.23	48.75	52.98	49.57	46.24	50.48	47.53	41.57
None	12.3	14.59	19.05	15.69	8.27	17.94	21.36	22.44	24.29	21.3	19.76	16.63	19.22	23.44	17.18	22.38	28.21

Figure 10

	Yes, I am actively seeking	No, but I may be open to job offers	No
Yes, and I got an interview	15.54	19.72	15.26
Yes, but I refused the contract	4.5	10.63	11.79
No	79.96	69.66	72.95

Figure 11

	JS	R
Yes, as flexibility of working time	19.9	36.23
Yes, as flexibility of workplace	18.28	32.71
Yes, as focus on deliverables	5.87	21.03
Yes, as bring own device policy	5.61	11.53
No	69.39	44.77

Figure 12

	Yes, from home	Yes, in a coworking space	Yes, everywhere	Yes, closest to home	No
Male	52.56	34.68	35.86	41.97	18.29
Female	57.8	32.05	25.93	43.51	15.75

Figure 13

	Yes, from home	Yes, in a coworking space	Yes, everywhere	Yes, closest to home	No
under 30	27.77	21.10	18.52	23.52	9.09
over 30	33.10	16.93	16.10	24.20	9.67

Figure 14

	Yes, from home	Yes, in a coworking space	Yes, everywhere	Yes, closest to home	No
Central Europe	53.49	29.43	29.65	39.78	23.41
Asia	67.27	27.9	40.99	39.58	8.16
Americas	52.43	44.38	29.03	50.34	7.02
Eastern European Countries	67.49	26.22	35.54	39.48	10.65

Figure 15

	JS	R
Home	54.89	22.74
Coworking spaces	33.13	22.1
The branch/office closest to home	42.54	21.9
Everywhere, mobile	30.51	18.28

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