

About the 2013 Research

The 2013 Allied Workforce Mobility Survey, conducted in April 2013, captures the voice of HR professionals on critical topics relating to “workforce mobility,” which is defined as the willingness and ability of employees to relocate for a job with either a current or new employer.

The survey approaches workforce mobility from two angles. One set of questions assesses the “mobility environment,” the context in which relocation occurs, including economic, cultural, demographic and organizational variables.

The second set of questions examines HR topic areas related to or affected by workforce mobility: recruitment, relocation, onboarding and retention. These topics encompass a broad range of activities and responsibilities for HR professionals, not limited to moving or relocating. The survey was intended to identify tools and practices, as well as measures for success in these areas.

Study overall results are scheduled to be released in stages:

- Overview and Telecommuting: May 15
- Recruiting: Mid-Summer
- Retention and Onboarding: Early Fall

Sponsored by Allied Van Lines, the survey is intended as a service to human resource professionals and is part of a larger ongoing initiative, Allied HR IQ, which will conduct additional research projects, host events and facilitate discussions in the HR community via the Allied HR IQ website.

The topic areas and questions for the survey were determined through collaborative discussions involving Allied Van Lines, Allied’s independent research partners, and distinguished HR professionals.

For more info, please visit us online at:

- Website: <http://www.alliedHRIQ.com>
Facebook: <http://www.facebook.com/AlliedHRIQ>
LinkedIn: <http://www.linkedin.com/groups/AlliedHR-IQ-4900645>
Pinterest: <http://pinterest.com/alliedvl/allied-hr-iq/>

Survey Methodology

The 2013 Allied Workforce Mobility Survey was conducted online with 200* human resource professionals from 39 states and the District of Columbia. The vast majority of respondents are employed by companies (92 percent vs. 8 percent external contractors), across a broad spectrum of HR titles, companies and industries.

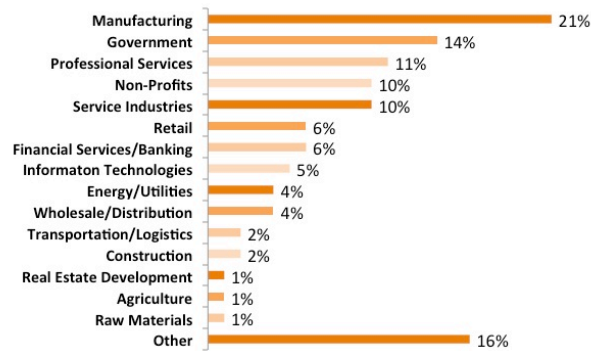
Respondent Responsibilities Within HR:

HR managers/supervisors.....	34%
HR generalists.....	26%
HR specialists.....	26%
Recruiters.....	15%
Director/VP.....	14%
HR assistants.....	7%
C-level/Directors/VPs.....	5%
HR analyst.....	1%
Consultant.....	1%
Other Position.....	3%

*A sample of 200 yields a confidence interval of 95 percent ± 4 percent.



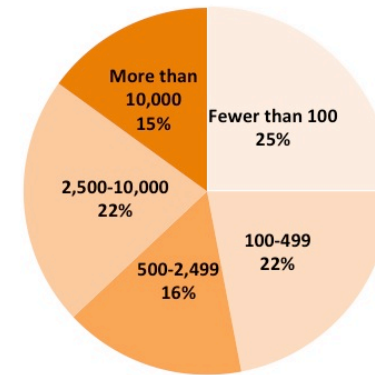
Figure 1: Industries Represented



Q: Which of the following best describes your company's business (Check all that apply)
 Source: 2013 Workforce Mobility Survey
 AlliedHRIQ.com

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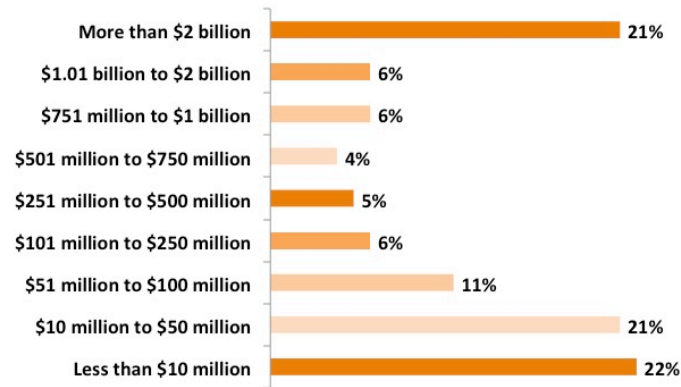
Figure 3: Company Size (Number of Employees)



Q: Approximately how many full-time employees are currently in your company?
 Source: 2013 Workforce Mobility Survey
 AlliedHRIQ.com

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Figure 2: Company Size (Annual Sales)



Q: What are your company's approximate annual sales?
 Source: 2013 Workforce Mobility Survey
 AlliedHRIQ.com

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Results

Recruiting and Relocation Environment is Changing

According to the 2013 Allied Workforce Mobility Survey, human resource professionals believe the hiring environment is improving compared to 2012 results.

In addition, in light of the recent decision by Yahoo CEO Melissa Mayer to end its telecommuting policy, the 2013 Allied Workforce Mobility Survey revealed that telecommuting, while not universally implemented, is utilized in various ways:

- Overall, telecommuting policies are weak regardless of company size, however, most feel their organizations provide “flexible working arrangements” that are stronger than their telecommuting policies alone.
- Telecommuting is allowed in less than half the organizations surveyed, but many still allow employees to work remotely even though they don’t have a formal telecommuting policy.
- Large companies have stronger telecommuting policies, but it doesn’t play a significant role for those that have highly successful recruiting programs.
- The amount of employees who misuse the telecommuting policy is minimal, but the main reason cited for misuse is a perceived lack of rapid communication.
- Companies who offered telecommuting in 2012 plan to continue the policy moving forward.

The 2013 Allied Workforce Mobility Survey, sponsored by Allied Van Lines, asked HR professionals about strategies, practices and performances relating to workforce mobility. The results address recruiting and relocation.

Two hundred HR professionals in the U.S. took part in the survey, sharing their perspectives on how they manage recruitment and relocation in the current economic context. They noted what they were and were not doing well. In addition, they reported on a wide range of strategies, approaches and practices, which varied not only by the size of their companies, but also by the success of their recruiting and relocation programs (see Segments for more). These differences may illuminate a path toward improved recruitment and relocation practices for all firms, even those that currently lag well behind industry leaders.

The Mobility Picture Is Improving

In the 2013 Allied Mobile Workforce Mobility Survey, 20% of HR professionals characterized unemployment in their region as “high or “excessive,” but it was lower than the 30% reported in the 2012 survey.

Overall, HR professionals were pretty bullish on how they perceive today’s workforce mobility attitude:

- Moderately Mobile.....47%
- Somewhat Mobile.....44%
- Highly Mobile.....7%
- Not Mobile.....3%

This mentality was seen for most available positions, not just specific opportunities, which shows promise for the hiring outlook.

Relocation Continues to Favor the Young

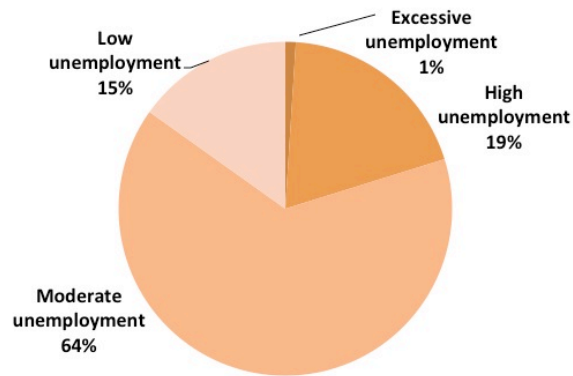
Younger candidates are the most willing to relocate given the right incentives, according to the survey; 61% see candidates 30 years old or younger the most willing to relocate.

What drives people to move for a new opportunity? Seventy-seven percent (77%) surveyed indicated career advancement and a bigger salary. Other factors included better benefits and a new environment.

Of those who didn’t want to relocate, 77% felt that a candidate’s home and family obligations were the biggest factors. In addition, selling their home, issues related to their family network (i.e. aging parents, friends/family), and allegiance to a current employer were also factors.

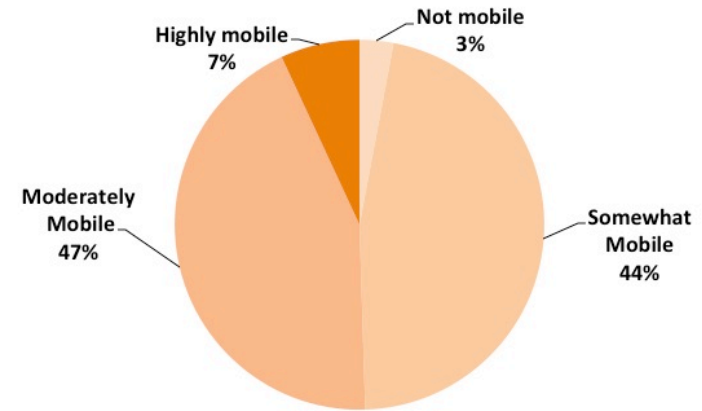


Figure 8: HR Professionals report fairly high unemployment in their area



Q: Describe the unemployment in your region.
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

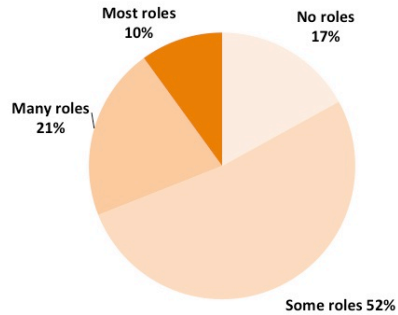
Figure 9: HR Professionals are pretty bullish on today's workforce mobility



Q: In your opinion, how mobile (willing to relocate) is today's U.S. workforce?
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com



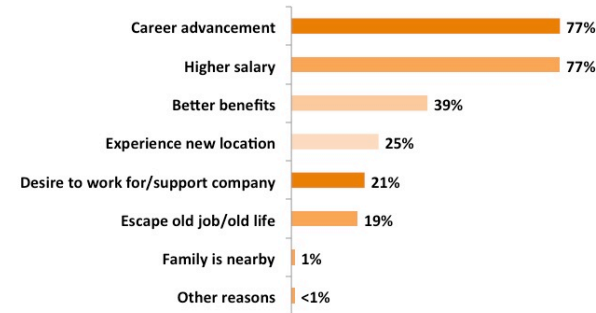
Figure 10: A variety of roles require executives willing to relocate



Q: Does your company look for executives who are willing to relocate throughout their careers for...
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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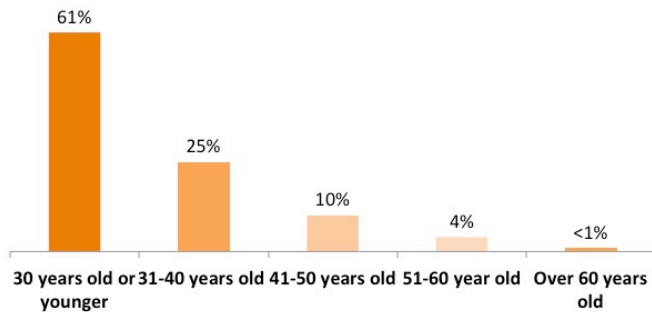
Figure 12: Key motivations for relocating are chiefly career advancement and a higher salary



Q: What is most likely to drive employees' or new hires' willingness to relocate? (Check all that apply)
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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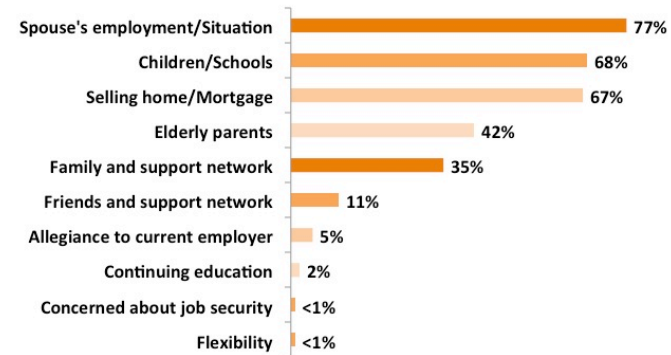
Figure 11: The younger the candidate, the more willing he or she is willing to relocate



Q: In your opinion, what age group of employees or new hires is most willing to relocate?
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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Figure 13: Home and family obligations put a damper on a person's desire to relocate



Q: What is most likely to restrict employees' or new hires' willingness to relocate (Check all that apply)
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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Telecommuting Policies – Naughty or Nice?

In light of the recent decision by Yahoo CEO Marissa Mayer to require telecommuting employees to return to the office, the 2013 Allied Workforce Mobility Survey dedicated a section to determine what HR professionals are currently doing in terms of their own telecommuting policies

Telecommuting Policies Are Generally Weak

Across the entire spectrum of HR professionals surveyed (those with and without telecommuting) most do not think their companies' telecommuting policy is particularly strong – probably since many do not offer it in the first place as will be discussed later. In fact, telecommuting is one of the weakest recruiting factors measured. Worse yet, 19 percent of companies in the survey sample do not offer any of the 10 relocation package components listed in the survey.

For Example:

- A mere 9% classified their organization's telecommuting policy as being very strong (in this case, a rating of 5 on a 5-point scale, where 5 is "strength").
- About one in four (24%) consider their telecommuting policy to be quite weak (a 1 on the 5-point scale where 1 is "weakness").
- HR professionals who consider themselves "experts" at recruiting take about as dim a view of their company's telecommuting policies as HR professionals with less recruiting expertise. In other words, the feeling among HR professionals, irrespective of recruiting expertise, is universal.

In Telecommuting, Size Does Matter...A Little.

The survey tried to determine if the reported size of a company impacted the strength of their telecommuting policy. Incredibly, it only mattered slightly:

- "Mega" companies – those organizations with more than 10,000 employees – are only somewhat more likely than companies with fewer than 10,000 employees to report having strong telecommuting policies. However, mega firms' telecommuting policies still take a distant backseat to other recruiting factors that an HR professional at these huge companies can use to entice a job candidate.

- Small, medium and large companies were comparable in the strength (or lack thereof) of their telecommuting efforts. In each type of company, only about 1 in 5 HR professionals deem their companies telecommuting policies as strong.

Telecommuting Is Not A Big Recruiting Tool

We asked HR professionals how they ranked their telecommuting policy compared to other recruiting factors.

Overall, mega companies were stronger than others on having a telecommuting policy in place, but it wasn't a strong recruiting tool. Other factors such as healthcare benefits, company culture and retirement benefits were more important to them.

Workplace Flexibility Is More Accepted Than Telecommuting

Although HR professionals report that their companies' telecommuting policies were weak, this does not mean that their companies had highly rigid work environments.

HR professionals believe their organizations were relatively strong in providing "flexible working arrangements" (presumably including things like flex hours, personal time off, liberal vacation policies, etc.). And these flexible working arrangements were much stronger at companies than are their telecommuting policies alone.

Further, the results show that companies which are "highly successful" in recruiting new employees have much greater workplace flexibility than do less successful ones. And within these highly successful companies, workplace flexibility policies were superior to telecommuting policies.

Finally, while some companies do not even have formal telecommunicating policies, they still allow their employees to work remotely as needed.



Table 1: “Experts” in recruiting are not particularly enthusiastic about their firms’ telecommuting policy, nor are less expert HR professionals for that matter

	Total	HR Professionals' Self-Perceived Expertise in Recruiting	
		Expert	Very Familiar/Familiar
% = 5 or 4 on a 5-point scale. Higher percents mean greater strength in that area.			
Healthcare benefits	68%	71%	66%
Company culture/Atmosphere	59%	65%	55%
Quality of executives/Workforce	56%	65%	51%
Location of job/Company	54%	65%	49%
Retirement benefits	51%	58%	46%
Development learning opportunities	50%	61%	43%
Compensation	48%	61%	41%
Career advancement opportunities	45%	47%	44%
Flexible working arrangements	39%	41%	37%
Closing skills	34%	43%	29%
Negotiating skills	33%	43%	27%
Relocation package	33%	36%	32%
Telecommuting policy	24%	28%	22%
Lifestyle benefits	14%	15%	14%

Q: Rate your company's strength on each of the following recruitment factors.
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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Table 2: Telecommuting policies are a little stronger at “mega” companies than at smaller ones, but still quite weak in comparison to other recruiting enticements

	Total	Size of company: Number of Employees			
		Mega (Over 10,000)	Large (2,500 – 10,000)	Mid-Size (200-2,499)	Small (Fewer than 200)
% = 5 or 4 on a 5-point scale. Higher percents mean greater strength in that area.					
Healthcare benefits	68%	81%	67%	78%	53%
Company culture/Atmosphere	59%	71%	51%	56%	60%
Quality of executives/Workforce	56%	74%	47%	55%	54%
Location of job/Company	54%	65%	56%	58%	46%
Retirement benefits	51%	65%	53%	58%	35%
Development learning opportunities	50%	71%	47%	48%	43%
Compensation	48%	58%	36%	53%	47%
Career advancement opportunities	45%	74%	47%	45%	31%
Flexible working arrangements	39%	45%	40%	34%	38%
Closing skills	34%	42%	42%	36%	24%
Negotiating skills	33%	39%	36%	33%	28%
Relocation package	33%	55%	38%	34%	19%
Telecommuting policy	24%	36%	24%	20%	22%
Lifestyle benefits	14%	29%	16%	14%	7%

Q: Rate your company's strength on each of the following recruitment factors.
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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Table 3: Telecommuting does not play much of a role even at companies which report having highly successful recruiting programs

	Total	Company Success at Recruiting		
		Highly Successful	Somewhat Successful	Unsuccessful/No Recruiting Program
% = 5 or 4 on a 5-point scale. Higher percents mean greater strength in that area.				
Healthcare benefits	68%	73%	66%	57%
Company culture/Atmosphere	59%	83%	42%	48%
Quality of executives/Workforce	56%	73%	45%	38%
Location of job/Company	54%	71%	41%	52%
Retirement benefits	51%	64%	45%	24%
Development learning opportunities	50%	57%	46%	38%
Compensation	48%	64%	38%	33%
Career advancement opportunities	45%	53%	42%	29%
Flexible working arrangements	39%	54%	29%	19%
Closing skills	34%	48%	28%	5%
Negotiating skills	33%	45%	27%	14%
Relocation package	33%	39%	33%	10%
Telecommuting policy	24%	38%	16%	10%
Lifestyle benefits	14%	15%	16%	5%

Q: Rate your company's strength on each of the following recruitment factors.
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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A look at companies offering Telecommuting

Telecommuting Landscape

Fewer than half (46%) of the companies surveyed in the *2013 Workplace Mobility Study* allow telecommuting in their organization. However, those who normally do are “mega-sized” (61%) and large (53%) organizations.

Interestingly enough, for those who do allow telecommuting, almost half of them do not have a formal telecommuting policy in place, but still allow their employees to work remotely

In addition, in those companies that do have telecommuting, nearly 1 in 4 employees, on average, take advantage of it.

Finally, although very large companies offer telecommuting more so than smaller ones, the employees at these larger companies do not take advantage of the opportunity as often as employees at smaller companies.

Telecommuting Impact

We also investigated why a company would allow telecommuting, regardless if they had a formal policy or not. Clearly, the primary reason companies allow their employees to telecommute (whether they have a formal policy or not) is to help employees maintain balance between work life and personal life. A secondary reason is that they believe it increases employee productivity.

As it relates to results, HR professionals whose companies allow telecommuting are not necessarily wildly enthusiastic about how well it’s working. Sixty percent (60%) reported that telecommuting has been “somewhat successful,” while only 34% say it has been “highly successful.”

One positive piece of news is that HR professionals feel that very few employees (9%) abuse their telecommuting privileges. However, when there are issues with employees and telecommuting, the most frequently mentioned problem is the perception that an employee’s communication is tardy. The next major issues were related to the inability

to log into the company network and perceived high activity of non-work related projects by an employee.

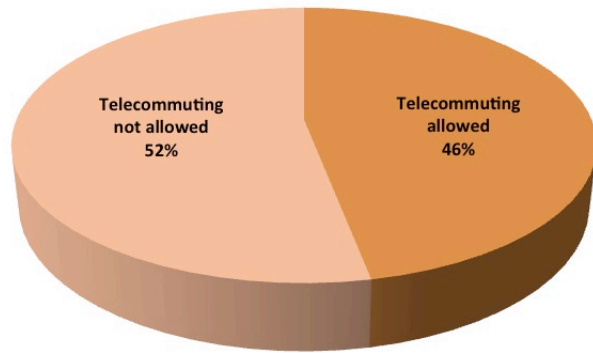
Telecommuting in 2013 and Beyond

Although it doesn’t always work perfectly, and while there are scattered incidents of misuse, all the companies that currently offer telecommuting – irrespective of size – plan to continue to offer employees the opportunity to work remotely in 2013.

Conversely, most of the companies that did not offer telecommuting in 2012 don’t plan to offer it in 2013 either; only a tiny handful (6%) of companies that currently do not offer telecommuting plan to make it available in 2013.



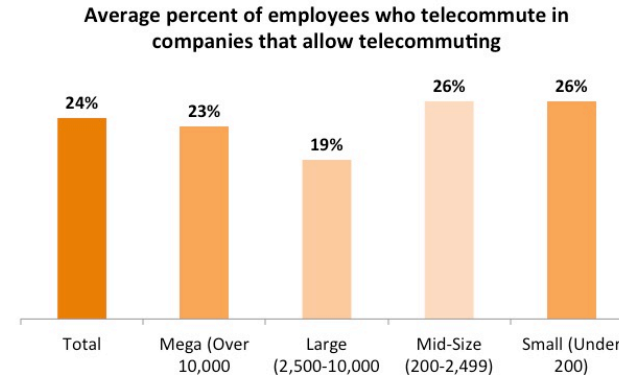
Figure 15: Telecommuting is allowed in under half the organizations surveyed



Q: Is telecommuting allowed in your organization?
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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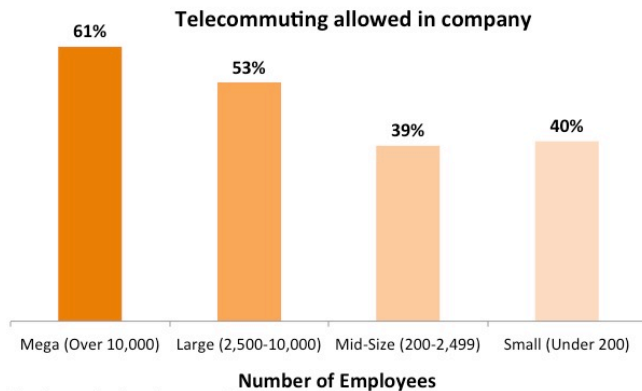
Figure 17: On average, nearly one-quarter of employees at companies that allow telecommuting take advantage of it, especially those working at small and mid-size companies.



Q: Approximately what percent of your employees telecommute?
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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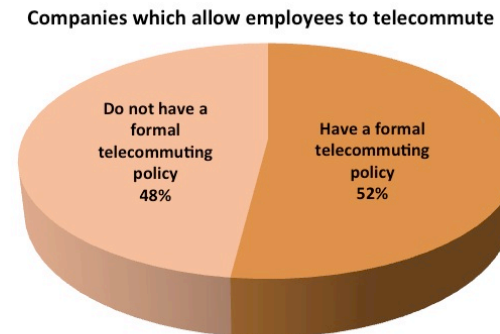
Figure 16: Larger companies – those with at least 2500 employees – are more apt to offer telecommuting



Q: Is telecommuting allowed in your organization?
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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Figure 18: Almost half the companies which allow employees to telecommute do not have a formal telecommuting policy in place.



Q: Does your organization have a formal telecommuting policy?
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

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Figure 19: Larger organizations are more likely to have a formal telecommuting policy

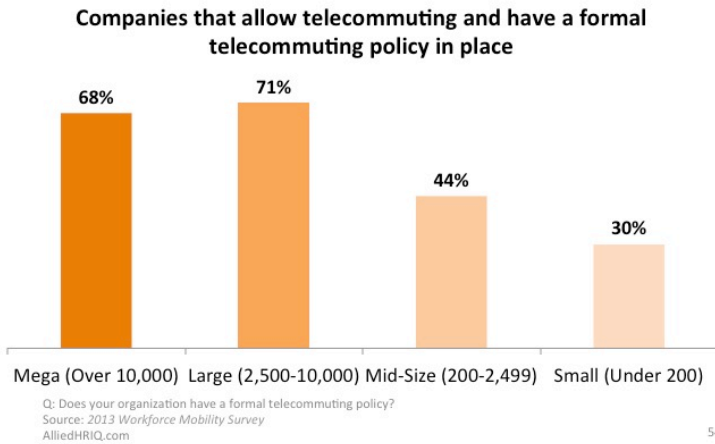


Figure 21: Telecommuting has not been an unqualified success in many organizations

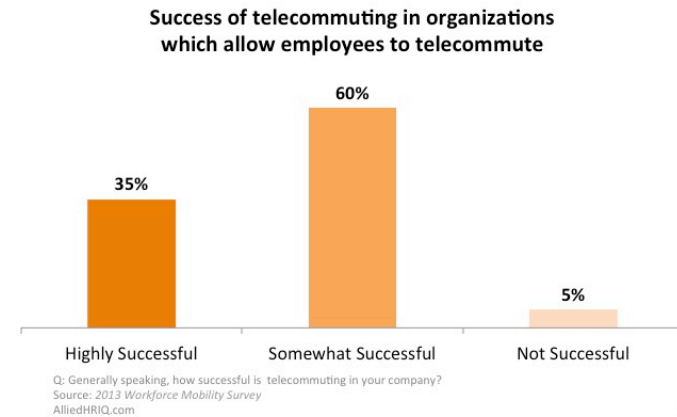


Figure 20: The driving force behind a company's decision to let their employees telecommute is to help them maintain work-life balance. Increased productivity is next.

Importance Rank	Reasons for allowing telecommuting			
	Work-Life Balance	Increase Productivity	Cost Containment	Accommodate Maternity Needs
1 (Most Important)	65%	21%	11%	3%
2	17%	46%	22%	15%
3	18%	26%	41%	15%
4 (Least Important)	--	6%	26%	67%

Q: Please rank the following reasons on how important they were in your organization's decision to allow telecommuting.
Source: 2013 Workforce Mobility Survey
AlliedHRIQ.com

Figure 22: Only 1 in 11 employees misuse their company's telecommuting policy

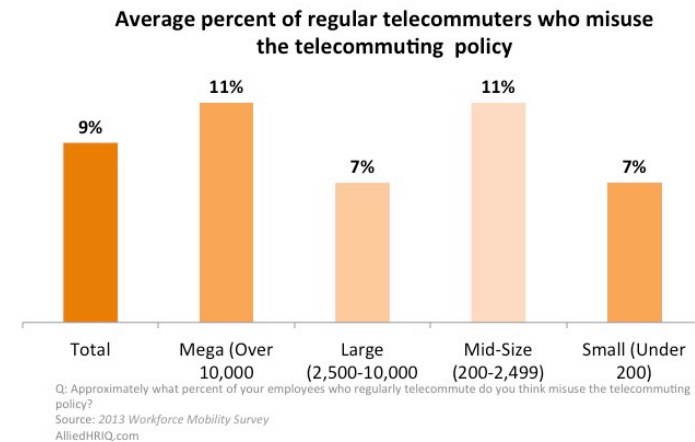


Figure 23: Lack of rapidly communicating with the office is the biggest reported problem with telecommuting

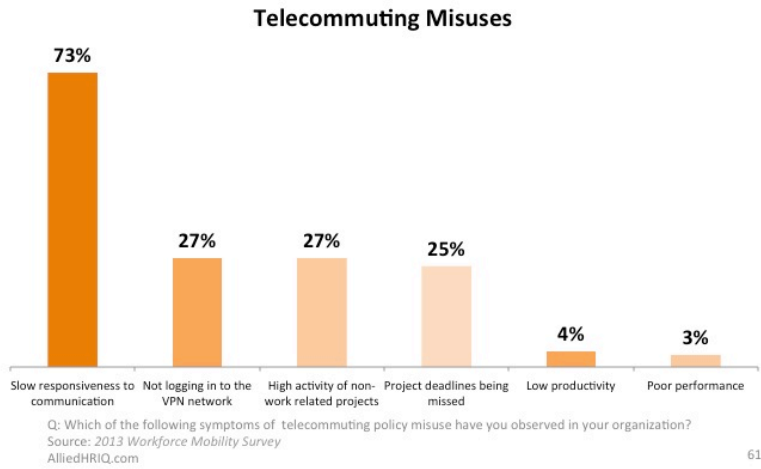
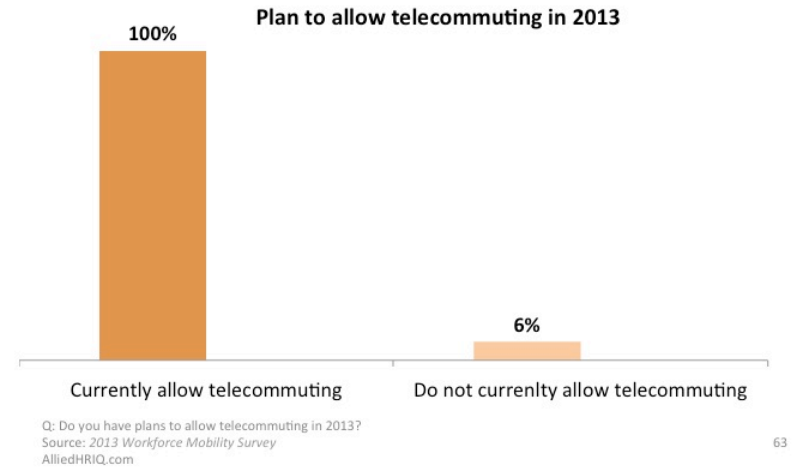


Figure 24: Telecommuting “inertia” is in effect. Those companies which currently offer it plan to continue to do so in 2013. Most that don’t offer it now won’t in 2013.



Implications

Three Lessons for Mobility and Telecommuting Success

Based on the 2013 Allied Workforce Mobility Survey, here are a few lessons to be learned based on the first set of research findings, which focus on recruiting and relocation.

Lesson 1: The Right Approach Will Reap Rewards

While we aren't out of the woods just yet, optimism toward the economy is clearly seen by the drop in perceived unemployment by HR professionals from 2012 to 2013 (30% to 20%).

In addition, job seekers seem more apt to relocate at this time. This should allow HR professionals to feel more confident about filling positions from a wider geographic pool.

So what do the survey results show us?

- Higher salary and career development are the biggest drivers to those who are open to relocating.
- Telecommuting in itself isn't a strong stand-alone factor or benefit for a job seeker. Focusing on other more important factors (i.e., healthcare benefits, company culture, etc.) is a better way to position yourself with a candidate who is considering your opportunity against others.

Lesson 2: Telecommuting is still a viable option

In light of the research, telecommuting can be a desirable benefit, but works most efficiently with a predictable policy in place.

Some key take away points include:

- Have clear expectations in your telecommuting policy so that employees know how and when to use it.
- Express the key negative perceptions of telecommuting so that employees can be aware of the concern and show productivity to team members.

- Be mindful that most employees who utilize telecommuting desire a good "work-life balance."
- Most HR professionals have confidence in their employees who telecommute.

Lesson 3: Make Telecommuting part of an overall "Work Flexibility" benefit in recruiting efforts.

If telecommuting isn't being offered or you don't even have a formal policy, it appears you are not alone. Employees are just as interested in the larger concept of "work flexibility" that can include telecommuting as a part.

Some key take away points include:

- In your recruiting efforts, focus more on the totality of your flexible working benefits rather than solely on your telecommuting policy. If you don't have much flexibility, consider expanding your offerings.
- Showcase how "work flexibility" is being successfully implemented at your company and ask candidates what is important to their growth.
- If it is important to your company, leverage "work flexibility" in recruiting efforts as part of helping employees achieve "work-life balance."

