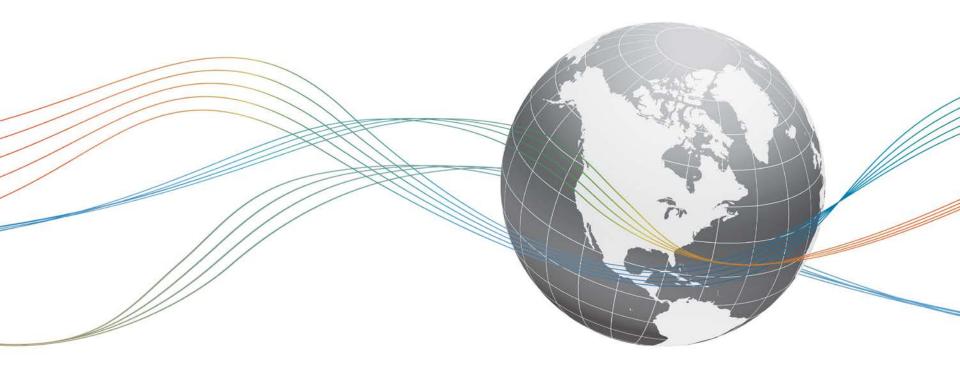
Melanie Holmes, Vice President February 20, 2017





February 20, 2017

The world of work is changing...

Technology Large-scale workforce consolidations "Reinventing" Managing multi-generational workforces Work Global talent scarcity Need to adapt to **Increasing work migration** diverse and flexible work arrangements Drive for "Green" job creation Social ne Aging workforces

ManpowerGroup

ManpowerGroup^{**}

ManpowerGroup[™] is the world leader in innovative workforce solutions. We leverage our global reach and local expertise of tens of thousands of people across more than 80 countries, making it possible for businesses to access the talent they need when they need it.

ManpowerGroup[™] Solutions provides clients with human resources outsourcing services primarily in the areas of large-scale recruiting and outcome-based workforce-intensive initiatives, thereby sharing in the risk and reward with our clients.

Manpower

Experis ManpowerGroup

ManpowerGroup

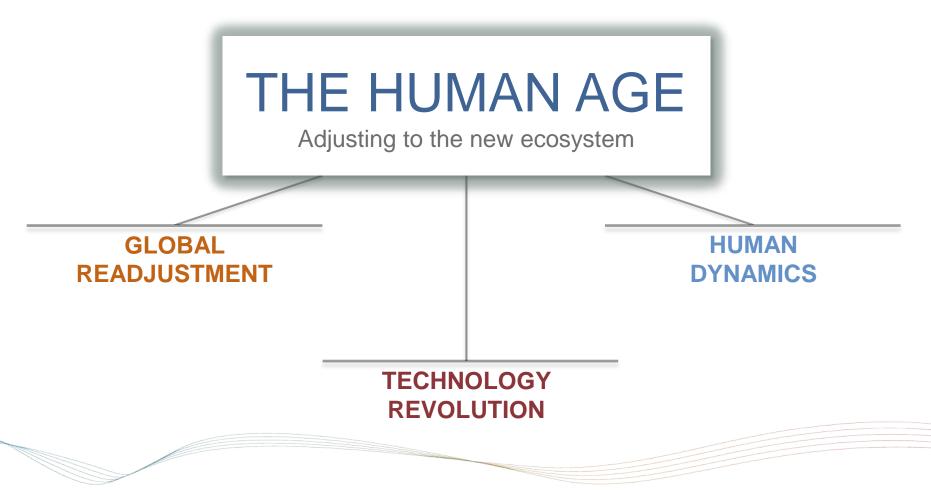
Solutions

Manpower[®] is the global leader in contingent and permanent recruitment workforce solutions. We provide the personal flexibility and agility businesses need with a continuum of staffing solutions. **Experis**[™] is the global leader in professional resourcing and project-based workforce solutions. With operations in more than 50 countries, we deliver 53 million hours of professional talent specializing in IT, Finance and Engineering to accelerate clients' businesses each year.



Right Management[®] is the global leader in talent and career management workforce solutions. Through our innovative and proprietary process, we leverage our expertise to successfully increase productivity and optimize business performance.

Global forces



Global readjustment

Economic reversal and social / economic bifurcation

Demographics

Minority majority

Human dynamics



Riding the technology wave

How, when and where we work – and who works

Productivity/ efficiency Velocity of change

The world is entering a new reality



Eras defined by the **raw materials** people bent to their will:

- Stone Age
- Bronze Age
- Iron age



Eras defined by the **domains** that people conquered with ever-increasing technology:

- Industrial Age
- Space Age
- Information age



Era defined by the **ingenuity** of individuals and of the community:

Human Age

Photo Credits; Johann Helgason, monroega.us, Google

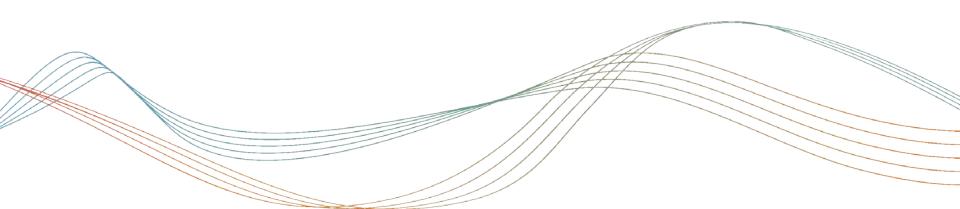
Shifts to the Human Age

Yesterday

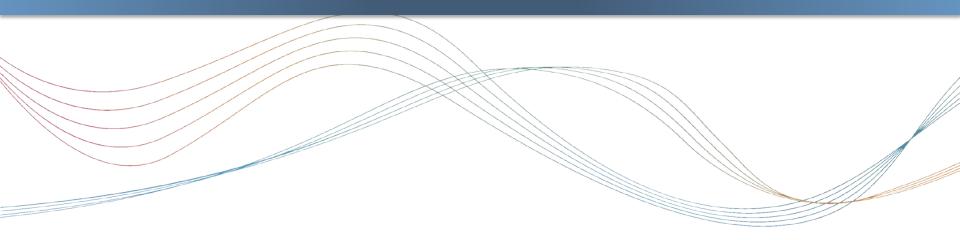
- Industrial / information ages
- Capitalism
- Workers chasing companies
- Companies dictate terms
- Workers living near work
- Unemployment over-supply
- Technology the enslaver
- Closed borders
- Job for life
- Size matters
- Command and control

Tomorrow

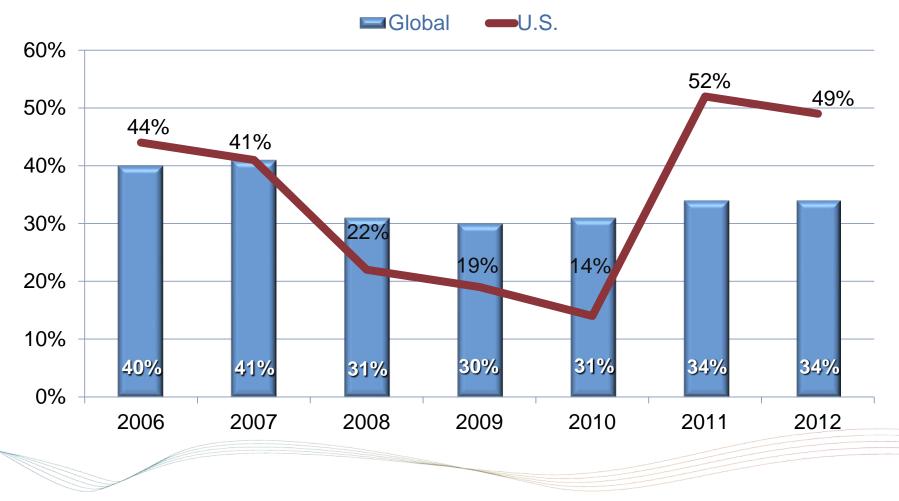
- The Human Age
- Talentism
- Companies chasing workers
- Employees dictate terms
- Workers living anywhere
- Unemployment specific demand
- Technology the liberator
- Open borders
- 10 to 14 jobs by age 38
- Agility matters
- Flexible frameworks



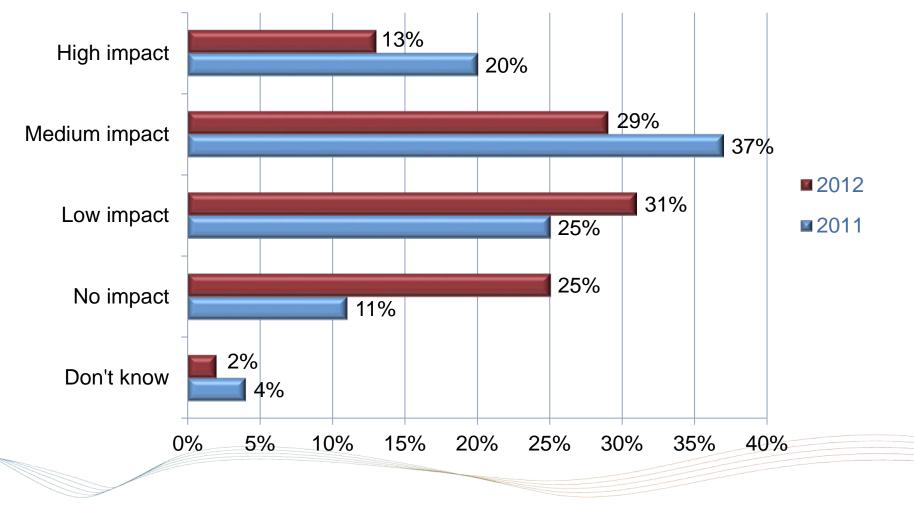
ManpowerGroup Talent Shortage Survey



Percentage of employers having difficulty



Perceived impact



Top 10 hardest jobs to fill in the U.S.

- 1. Skilled Trades
- 2. Engineers
- 3. IT Staff
- 4. Sales Representatives
- 5. Accounting & Finance

- 6. Drivers
- 7. Mechanics
- 8. Nurses
- 9. Machinists/Machine Operators

10. Teachers

Why are employers having difficulty?

Lack of available applicants/no applicants

Lack of industry-specific qualifications

Lack of "hard" job skills or technical competencies

Attention to detail

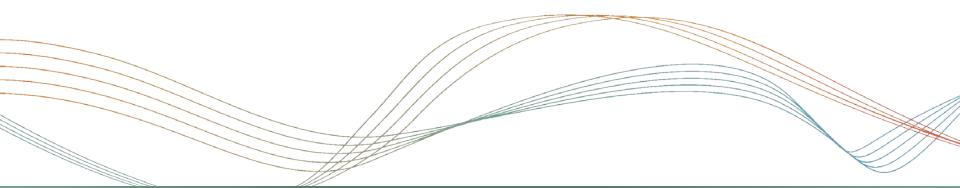
Workplace competencies (soft skills)

Lack of The Talent Shortage

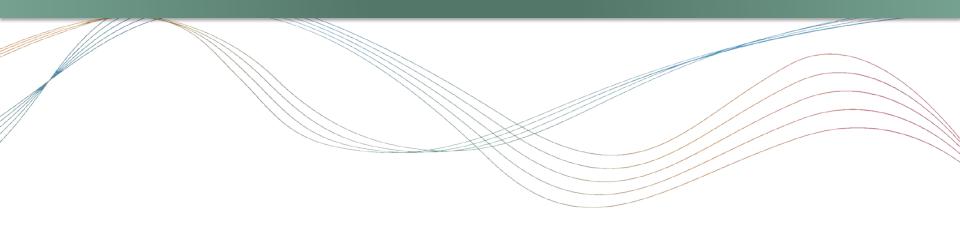
Looking for more pay than is offered

What strategies are employers pursuing?

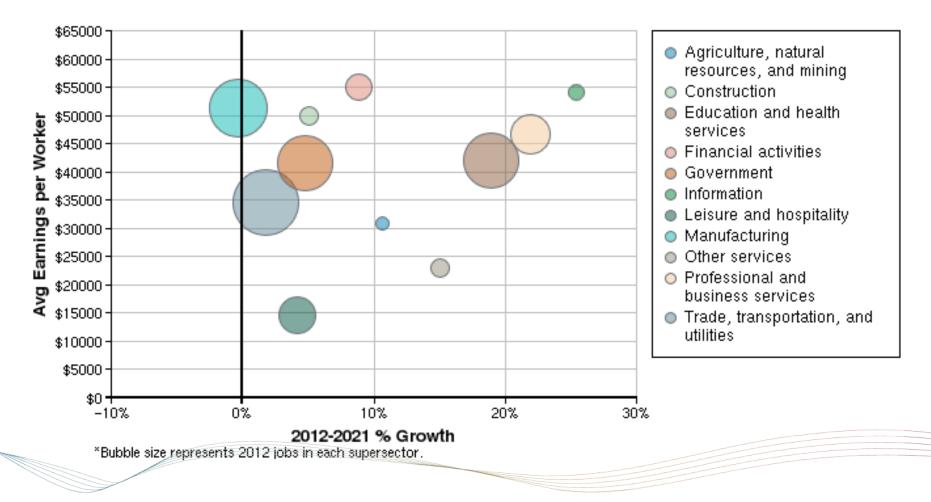
- Focusing more on staff retention.
- Hiring people who don't have the job skills currently, but have potential to learn and grow.
- Providing additional training and development to existing staff.
- Broadening the search outside of local region.
- Increasing the focus on improving the business pipeline.
- Increasing starting salaries.
- Partnering with educational institutions.



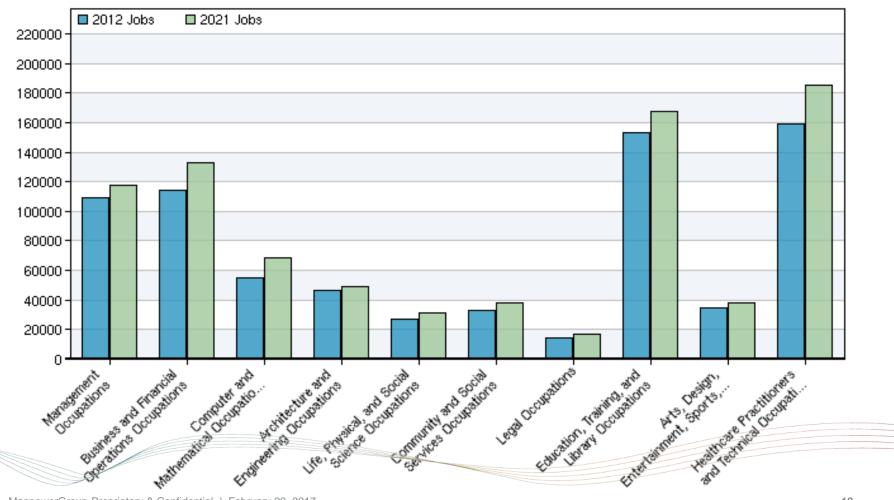
Wisconsin data



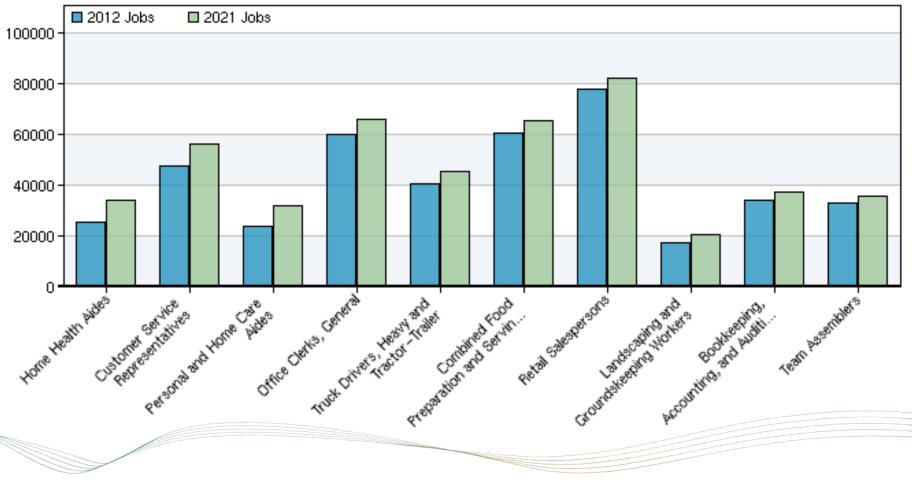
Industry size and growth



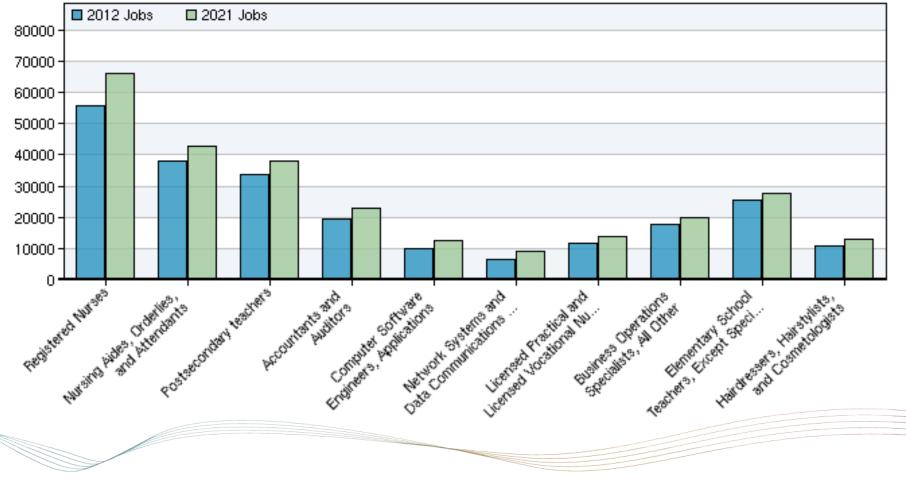
Occupation size and growth



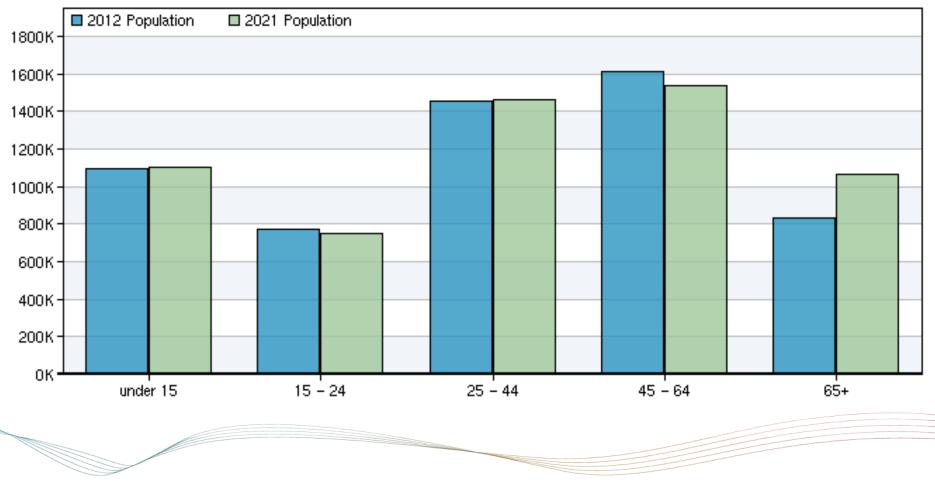
Fastest growing non-professional occupations



Fastest growing professional occupations



Age size and growth



Talent Mismatch: the Gap Widens

By 2020 there will be 123 million

high-skill, high-pay jobs available in the U.S., but only

50 million

Americans with the right education to fill them.

Source: Economist Intelligence Unit



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www.manpowergroup.com