

supply / demand

Talent Shortage Survey 2008 Global Results



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2008 Talent Shortage Survey Results

Manpower Inc. (NYSE: MAN) surveyed nearly 43,000 employers across 32 countries and territories in late January 2008 to determine the extent to which talent shortages are impacting today's labor markets. The results of the third annual Talent Shortage Survey revealed that 31 percent of employers worldwide are having difficulty filling positions due to the lack of suitable talent available in their markets, which is 10 percentage point weaker compared to last year's survey.

Employers having the most difficulty finding the right people to fill jobs are those in Romania (73%), Japan (63%), Hong Kong (61%), Singapore (57%), Australia (52%) and Taiwan (51%). The talent shortage appears to be least problematic in India (12%), United Kingdom (12%), Ireland (14%), China (15%) and the Netherlands (15%).

Compared to 2007, employers are reporting that talent shortages are less pervasive in Costa Rica (down 59 percentage points), Mexico (down 54 percentage points), Peru (down 24 percentage points) and United Kingdom (down 22 percentage points).

Global Results

The top 10 jobs that employers are having difficulty filling across the 32 countries and territories surveyed are (ranked in order):

1. Skilled Manual Trades
2. Sales Representatives
3. Technicians (primarily production/operations, engineering or maintenance)
4. Engineers
5. Management/Executives
6. Laborers
7. Secretaries, PAs, Administrative Assistants & Office Support Staff
8. Drivers
9. Accounting & Finance Staff
10. IT Staff (primarily programmers/developers)

Total Number of Respondents: 42,585

Employers indicating difficulty filling positions: 31%

Employers indicating no difficulty filling positions: 69%

Margin of error: +/- 3.9%

* In this survey, Skilled Manual Trades refers to a broad range of job titles that require workers to possess specialized skills, traditionally learned over a period of time as an apprentice. Examples of skilled trades jobs are: electricians, bricklayers, carpenters, cabinetmakers, masons, plumbers, welders, etc. Where possible, these jobs are listed in order of highest demand for each country.



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2008 - 2006 Comparisons

| | 2008 - Difficulty Filling Positions (%) | 2007 - Difficulty Filling Positions (%) | 2008-Over-2007 Change (%) | 2006 Difficulty Filling Positions (%) | 2007-Over-2006 Change (%) | 2008 - No Difficulty Filling Positions (%) | 2007- No Difficulty Filling Positions (%) | 2008-Over-2007 Change (%) | 2006 No Difficulty Filling Positions (%) | 2007-Over-2006 Change (%) |
|---------------------|---|---|---------------------------|---------------------------------------|---------------------------|--|---|---------------------------|--|---------------------------|
| Global | 31 | 41 | -10 | 40 | 1 | 69 | 59 | 10 | 60 | -1 |
| Americas | 28 | 62 | -34 | 70 | -8 | 72 | 38 | 34 | 30 | 8 |
| Argentina | 36 | 41 | -5 | * | * | 64 | 59 | 5 | * | * |
| Canada | 31 | 36 | -5 | 66 | -30 | 69 | 64 | 5 | 34 | 30 |
| Costa Rica | 34 | 93 | -59 | * | * | 66 | 7 | 59 | * | * |
| Guatemala | 23 | * | * | * | * | 77 | * | * | * | * |
| Mexico | 28 | 82 | -54 | 78 | 4 | 72 | 18 | 54 | 22 | -4 |
| Peru | 28 | 52 | -24 | * | * | 72 | 48 | 24 | * | * |
| United States | 22 | 41 | -19 | 44 | -3 | 78 | 59 | 19 | 56 | 3 |
| Asia Pacific | 31 | 33 | -2 | 28 | 5 | 69 | 67 | 2 | 72 | -5 |
| Australia | 52 | 61 | -9 | 32 | 29 | 48 | 39 | 9 | 68 | -29 |
| China | 15 | 19 | -4 | 24 | -5 | 85 | 81 | 4 | 76 | 5 |
| Hong Kong | 61 | 49 | 12 | 31 | 18 | 39 | 51 | -12 | 69 | -18 |
| India | 12 | 9 | 3 | 13 | -4 | 88 | 91 | -3 | 87 | 4 |
| Japan | 63 | 61 | 2 | 58 | 3 | 37 | 39 | -2 | 42 | -3 |
| New Zealand | 47 | 62 | -15 | 25 | 37 | 53 | 38 | 15 | 75 | -37 |
| Singapore | 57 | 57 | 0 | 47 | 10 | 43 | 43 | 0 | 53 | -10 |
| Taiwan | 51 | 52 | -1 | 53 | -1 | 49 | 48 | 1 | 47 | 1 |
| EMEA | 32 | 31 | 1 | 39 | -8 | 68 | 69 | -1 | 61 | 8 |
| Austria | 44 | 33 | 11 | 31 | 2 | 56 | 67 | -11 | 69 | -2 |
| Belgium | 26 | 36 | -10 | 42 | -6 | 74 | 64 | 10 | 58 | 6 |
| Czech Republic | 37 | * | * | * | * | 63 | * | * | * | * |
| France | 31 | 40 | -9 | 30 | 10 | 69 | 60 | 9 | 70 | -10 |
| Germany | 34 | 27 | 7 | 53 | -26 | 66 | 73 | -7 | 47 | 26 |
| Greece | 47 | * | * | * | * | 53 | * | * | * | * |
| Ireland | 14 | 17 | -3 | 32 | -15 | 86 | 83 | 3 | 68 | 15 |
| Italy | 18 | 23 | -5 | 32 | -9 | 82 | 77 | 5 | 68 | 9 |
| Netherlands | 15 | 17 | -2 | 30 | -13 | 85 | 83 | 2 | 70 | 13 |
| Norway | 40 | 35 | 5 | 26 | 9 | 60 | 65 | -5 | 74 | -9 |
| Poland | 49 | * | * | * | * | 51 | * | * | * | * |
| Romania | 73 | * | * | * | * | 27 | * | * | * | * |
| South Africa | 38 | 39 | -1 | * | * | 62 | 61 | 1 | * | * |
| Spain | 27 | 33 | -6 | 57 | -24 | 73 | 67 | 6 | 43 | 24 |
| Sweden | 39 | 32 | 7 | 29 | 3 | 61 | 68 | -7 | 71 | -3 |
| Switzerland | 36 | 37 | -1 | 48 | -11 | 64 | 63 | 1 | 52 | 11 |
| UK | 12 | 34 | -22 | 42 | -8 | 88 | 66 | 22 | 58 | 8 |

Note: The margin of error varies from country to country. Please refer to the country results below for detailed information.



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2008 Results by Country

AMERICAS

Argentina

1. Technicians
2. Engineers
3. Skilled Manual Trades (primarily electricians, welders or carpenters/joiners)
4. Secretaries, PAs, Administrative Assistants & Office Support Staff
5. IT Staff
6. Laborers
7. Production Operators
8. Machinists/Machine Operators
9. Management/Executives
10. Mechanics

Total Number of Respondents: 801
Employers indicating difficulty filling positions: 36%
Employers indicating no difficulty filling positions: 64%
Margin of error: +/- 3.5%

Canada

1. Skilled Manual Trades (primarily carpenters/joiners, welders or electricians)
2. Sales Representatives
3. Engineers
4. Accounting & Finance Staff
5. Laborers
6. Nurses
7. Teachers
8. Drivers
9. Machinists/Machine Operators
10. Secretaries, PAs, Administrative Assistants & Office Support Staff

Total Number of Respondents: 1,742
Employers indicating difficulty filling positions: 31%
Employers indicating no difficulty filling positions: 69%
Margin of error: +/- 2.3%

Costa Rica

1. Technicians
2. Engineers
3. Receptionists
4. Laborers
5. Sales Managers
6. Drivers
7. Skilled Manual Trades (primarily welders, electricians or carpenters/joiners)
8. Mechanics
9. Management/Executives
10. Accounting & Finance Staff

Total Number of Respondents: 620
Employers indicating difficulty filling positions: 34%
Employers indicating no difficulty filling positions: 66%
Margin of error: +/- 3.9%

Guatemala

1. Sales Managers
2. Technicians
3. Management/Executives
4. Receptionists
5. Secretaries, PAs, Administrative Assistants and Office Support Staff
6. Skilled Manual Trades (primarily carpenters/joiners, masons, welders, electricians or bricklayers)
7. Legal Staff (primarily solicitors, lawyers or legal secretaries)
8. Mechanics
9. Teachers
10. Customer Service Representatives & Customer Support

Total Number of Respondents: 622
Employers indicating difficulty filling positions: 23%
Employers indicating no difficulty filling positions: 77%
Margin of error: +/- 3.9%

Mexico

1. Technicians
2. Production Operators
3. Management/Executives
4. Engineers
5. Secretaries, PAs, Administrative Assistants & Office Support Staff
6. Sales Representatives
7. Sales Managers
8. Laborers
9. Machinists/Machine Operators
10. Drivers

Total Number of Respondents: 4,799
Employers indicating difficulty filling positions: 28%
Employers indicating no difficulty filling positions: 72%
Margin of error: +/- 1.4%



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AMERICAS - Continued

Peru

1. Sales Managers
2. Laborers
3. Technicians
4. Management/Executives
5. Customer Service Representatives & Customer Support
6. Drivers
7. Receptionists
8. Secretaries, PAs, Administrative Assistants & Office Support Staff
9. Accounting & Finance Staff
10. Chefs/Cooks

Total Number of Respondents: 696

Employers indicating difficulty filling positions: 28%

Employers indicating no difficulty filling positions: 72%

Margin of error: +/- 3.7%

United States

1. Engineers
2. Machinists/Machine Operators
3. Skilled Manual Trades (primarily welders or carpenters/joiners)
4. Technicians
5. Sales Representatives
6. Accounting & Finance Staff
7. Mechanics
8. Laborers
9. IT Staff
10. Production Operators

Total Number of Respondents: 2,000

Employers indicating difficulty filling positions: 22%

Employers indicating no difficulty filling positions: 78%

Margin of error: +/- 2.2%



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ASIA PACIFIC

Australia

1. Skilled Manual Trades (primarily electricians, carpenters/joiners, or welders)
2. Engineers
3. Sales Representatives
4. Accounting & Finance Staff
5. Drivers
6. Technicians
7. Laborers
8. Secretaries, PAs, Administrative Assistants & Office Support Staff
9. Mechanics
10. Management/Executives

Total Number of Respondents: 2,216
Employers indicating difficulty filling positions: 52%
Employers indicating no difficulty filling positions: 48%
Margin of error: +/- 2.1%

China

1. Technicians
2. Sales Representatives
3. Management/Executives
4. Sales Managers
5. Machinists/Machine Operators
6. Engineers
7. Production Operators
8. Skilled Manual Trades (primarily electricians, carpenters/joiners or welders)
9. Laborers
10. Restaurants & Hotel Staff

Total Number of Respondents: 3,900
Employers indicating difficulty filling positions: 15%
Employers indicating no difficulty filling positions: 85%
Margin of error: +/- 1.6%

Hong Kong

1. Sales Representatives
2. Management/Executives
3. Accounting & Finance Staff
4. Engineers
5. Secretaries, PAs, Administrative Assistants & Office Support Staff
6. Technicians
7. IT Staff
8. Customer Service Representatives & Customer Support
9. Marketing & Public Relations Staff
10. Drivers

Total Number of Respondents: 625
Employers indicating difficulty filling positions: 61%
Employers indicating no difficulty filling positions: 39%
Margin of error: +/- 3.9%

India

1. IT Staff
2. Engineers
3. Management/Executives
4. Accounting & Finance Staff
5. Marketing & Public Relations Staff
6. Technicians
7. Laborers
8. Sales Representatives
9. Teachers
10. Designers

Total Number of Respondents: 5,279
Employers indicating difficulty filling positions: 12%
Employers indicating no difficulty filling positions: 88%
Margin of error: +/- 1.3%

Japan

1. Sales Representatives
2. Secretaries, PAs, Administrative Assistants & Office Support Staff
3. Technicians
4. IT Staff
5. Production Operators
6. Engineers
7. Skilled Manual Trades
8. Marketing & Public Relations Staff
9. Machinists/Machine Operators
10. Researchers (R&D)

Total Number of Respondents: 894
Employers indicating difficulty filling positions: 63%
Employers indicating no difficulty filling positions: 37%
Margin of error: +/- 3.3%

New Zealand

1. Sales Representatives
2. Skilled Manual Trades (primarily carpenters/joiners or electricians)
3. Engineers
4. Accounting & Finance Staff
5. IT Staff
6. Laborers
7. Technicians
8. Secretaries, PAs, Administrative Assistants & Office Support Staff
9. Management/Executives
10. Production Operators

Total Number of Respondents: 954
Employers indicating difficulty filling positions: 47%
Employers indicating no difficulty filling positions: 53%
Margin of error: +/- 3.2%

ASIA PACIFIC - continued

Singapore

1. Sales Representatives
2. Engineers
3. Management/Executives
4. Accounting & Finance Staff
5. Technicians
6. Secretaries, PAs, Administrative Assistants & Office Support Staff
7. IT Staff
8. Skilled Manual Trades
9. Customer Service Representatives & Customer Support
10. Drivers

Total Number of Respondents: 650
Employers indicating difficulty filling positions: 57%
Employers indicating no difficulty filling positions: 43%
Margin of error: +/- 3.8%

Taiwan

1. Other Professional Functions (e.g. Procurement, Legal, Planning, etc.)
2. Sales
3. Research & Development
4. Engineering/Technical
5. Management/Corporate/HR/Training Staff
6. Laborers
7. Production/Operations (e.g. Manufacturing, Logistics, Service Delivery, etc.)
8. Finance & Accounting Staff
9. Marketing & Public Relations Staff
10. IT Staff

Total Number of Respondents: 1,345
Employers indicating difficulty filling positions: 51%
Employers indicating no difficulty filling positions: 49%
Margin of error: +/- 2.7%

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Austria

1. Skilled Manual Trades (primarily carpenters/joiners or electricians)
2. Restaurants & Hotel Staff
3. Laborers
4. Technicians
5. Sales Representatives
6. Drivers
7. Management/Executives
8. Machinists/Machine Operators
9. Sales Managers
10. Mechanics

Total Number of Respondents: 752
 Employers indicating difficulty filling positions: 44%
 Employers indicating no difficulty filling positions: 56%
 Margin of error: +/- 3.6%

Belgium

1. Skilled Manual Trades (primarily welders, electricians, or carpenters)
2. Drivers
3. Laborers
4. Mechanics
5. Technicians
6. Doctors & Other Non-Nursing Health Professionals
7. Machinists/Machine Operators
8. Restaurants & Hotel Staff
9. Secretaries, PAs, Administrative Assistants & Office Support Staff
10. Accounting & Finance Staff

Total Number of Respondents: 776
 Employers indicating difficulty filling positions: 26%
 Employers indicating no difficulty filling positions: 74%
 Margin of error: +/- 3.5%

Czech Republic

1. Skilled Manual Trades (primarily electricians, carpenters/joiners or bricklayers)
2. Laborers
3. Drivers
4. Machinists/Machine Operators
5. Technicians
6. Doctors & Other Non-Nursing Health Professionals
7. Chefs/Cooks
8. Engineers
9. Sales Representatives
10. Accounting & Finance Staff

Total Number of Respondents: 784
 Employers indicating difficulty filling positions: 37%
 Employers indicating no difficulty filling positions: 63%
 Margin of error: +/- 3.5%

France

1. Skilled Manual Trades (primarily carpenters/joiners, electricians or masons)
2. Drivers
3. Mechanics
4. Customer Service Representatives & Customer Support Staff
5. Laborers
6. Chefs/Cooks
7. Technicians
8. Sales Representatives
9. Machinists/Machine Operators
10. IT Staff

Total Number of Respondents: 1,005
 Employers indicating difficulty filling positions: 31%
 Employers indicating no difficulty filling positions: 69%
 Margin of error: +/- 3.1%

Germany

1. Skilled Manual Trades (primarily electricians, masons or tilers)
2. Drivers
3. IT Staff
4. Engineers
5. Technicians
6. Mechanics
7. Sales Managers
8. Chefs/Cooks
9. Sales Representatives
10. Laborers

Total Number of Respondents: 1,006
 Employers indicating difficulty filling positions: 34%
 Employers indicating no difficulty filling positions: 66%
 Margin of error: +/- 3.1%

Greece

1. Secretaries, PAs, Administrative Assistants & Office Support Staff
2. Skilled Manual Trades (primarily electricians, plumbers or carpenters/joiners)
3. Technicians
4. Sales Representatives
5. Laborers
6. Customer Service Representatives & Customer Support Staff
7. Mechanics
8. Accounting & Finance Staff
9. Management/Executives
10. Restaurants & Hotels Staff

Total Number of Respondents: 762
 Employers indicating difficulty filling positions: 47%
 Employers indicating no difficulty filling positions: 53%
 Margin of error: +/- 3.6%

EUROPE, MIDDLE EAST & AFRICA (EMEA) – continued

Ireland

1. Skilled Manual Trades
2. Sales Representatives
3. Drivers
4. Accounting & Finance Staff
5. Engineers
6. Chefs/Cooks
7. Nurses
8. Restaurants & Hotel Staff
9. Mechanics
10. Customer Service Representatives & Customer Support Staff

Total Number of Respondents: 660
 Employers indicating difficulty filling positions: 14%
 Employers indicating no difficulty filling positions: 86%
 Margin of error: +/- 3.8%

Italy

1. Skilled Manual Trades (primarily carpenters/joiners, electricians or plumbers)
2. Laborers
3. Technicians
4. Customer Service Representatives & Customer Support Staff
5. Secretaries, PAs, Administrative Assistants & Office Support Staff
6. Engineers
7. Drivers
8. IT Staff
9. Mechanics
10. Chefs/Cooks

Total Number of Respondents: 1,002
 Employers indicating difficulty filling positions: 18%
 Employers indicating no difficulty filling positions: 82%
 Margin of error: +/- 3.1%

Netherlands

1. Technicians
2. Mechanics
3. Drivers
4. Production Operators
5. IT Staff
6. Customer Service Representatives & Customer Support Staff
7. Marketing & Public Relations Staff
8. Cleaners & Domestic Staff
9. Skilled Manual Trades (primarily electricians, welders or masons)
10. Engineers

Total Number of Respondents: 759
 Employers indicating difficulty filling positions: 15%
 Employers indicating no difficulty filling positions: 85%
 Margin of error: +/- 3.6%

Norway

1. Skilled Manual Trades (primarily carpenters/joiners, electricians or welders)
2. Engineers
3. Laborers
4. Sales Representatives
5. Mechanics
6. Drivers
7. IT Staff
8. Chefs/Cooks
9. Technicians
10. Accounting & Finance Staff

Total Number of Respondents: 760
 Employers indicating difficulty filling positions: 40%
 Employers indicating no difficulty filling positions: 60%
 Margin of error: +/- 3.6%

Poland

1. Skilled Manual Trades (primarily electricians welders or bricklayers)
2. Drivers
3. Technicians
4. Engineers
5. Customer Service Representatives & Customer Support Staff
6. Restaurants & Hotel Staff
7. Production Operators
8. Sales Representatives
9. Laborers
10. Secretaries, PAs, Administrative Assistants & Office Support Staff

Total Number of Respondents: 924
 Employers indicating difficulty filling positions: 49%
 Employers indicating no difficulty filling positions: 51%
 Margin of error: +/- 3.2%

Romania

1. Engineers
2. Skilled Manual Trades (primarily electricians, welders or bricklayers)
3. Management/Executives
4. Accounting & Finance Staff
5. Sales Representatives
6. Drivers
7. Mechanics
8. Restaurants & Hotel Staff
9. Laborers
10. Technicians

Total Number of Respondents: 841
 Employers indicating difficulty filling positions: 73%
 Employers indicating no difficulty filling positions: 27%
 Margin of error: +/- 3.4%

EUROPE, MIDDLE EAST & AFRICA (EMEA) – continued

South Africa

1. Skilled Manual Trades (primarily electricians, carpenters/joiners or welders)
2. Engineers
3. Accounting & Finance Staff
4. Technicians
5. Management/Executives
6. Teachers
7. Drivers
8. Sales Representatives
9. IT Staff
10. Secretaries, PAs, Administrative Assistants & Office Support Staff

Total Number of Respondents: 764
 Employers indicating difficulty filling positions: 38%
 Employers indicating no difficulty filling positions: 62%
 Margin of error: +/- 3.5%

Spain

1. Technicians
2. Skilled Manual Trades (primarily electricians, masons, welders or bricklayers)
3. Management/Executives
4. Accounting & Finance Staff
5. Production Operators
6. Laborers
7. Drivers
8. Secretaries, PAs, Administrative Assistants & Office Support Staff
9. Mechanics
10. Engineers

Total Number of Respondents: 1,000
 Employers indicating difficulty filling positions: 27%
 Employers indicating no difficulty filling positions: 73%
 Margin of error: +/- 3.1%

Sweden

1. Skilled Manual Trades (primarily electricians, plumbers or welders)
2. Sales Representatives
3. Drivers
4. Mechanics
5. Technicians
6. Engineers
7. Management/Executives
8. Secretaries, PAs, Administrative Assistants & Office Support Staff
9. Doctors & Other Non-Nursing Health Professionals
10. Chefs/Cooks

Total Number of Respondents: 755
 Employers indicating difficulty filling positions: 39%
 Employers indicating no difficulty filling positions: 61%
 Margin of error: +/- 3.6%

Switzerland

1. Skilled Manual Trades (primarily electricians or carpenters/joiners)
2. Technicians
3. Laborers
4. Mechanics
5. Management/Executives
6. Secretaries, PAs, Administrative Assistants & Office Support Staff
7. IT Staff
8. Sales Representatives
9. Nurses
10. Restaurants & Hotel Staff

Total Number of Respondents: 786
 Employers indicating difficulty filling positions: 36%
 Employers indicating no difficulty filling positions: 64%
 Margin of error: +/- 3.5%

United Kingdom

1. Skilled Manual Trades (primarily welders or carpenters/joiners)
2. Laborers
3. Chefs/Cooks
4. Engineers
5. Secretaries, PAs, Administrative Assistants & Office Support Staff
6. Nurses
7. Management/Executives
8. Sales Representatives
9. IT Staff
10. Drivers

Total Number of Respondents: 2,106
 Employers indicating difficulty filling positions: 12%
 Employers indicating no difficulty filling positions: 88%
 Margin of error: +/- 2.1%