

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 (%)
<b>Global</b>	<b>31</b>	<b>41</b>	<b>-10</b>	<b>40</b>	<b>1</b>	<b>69</b>	<b>59</b>	<b>10</b>	<b>60</b>	<b>-1</b>
<b>Americas</b>	<b>28</b>	<b>62</b>	<b>-34</b>	<b>70</b>	<b>-8</b>	<b>72</b>	<b>38</b>	<b>34</b>	<b>30</b>	<b>8</b>
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
<b>Asia Pacific</b>	<b>31</b>	<b>33</b>	<b>-2</b>	<b>28</b>	<b>5</b>	<b>69</b>	<b>67</b>	<b>2</b>	<b>72</b>	<b>-5</b>
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
<b>EMEA</b>	<b>32</b>	<b>31</b>	<b>1</b>	<b>39</b>	<b>-8</b>	<b>68</b>	<b>69</b>	<b>-1</b>	<b>61</b>	<b>8</b>
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/jointers, 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%