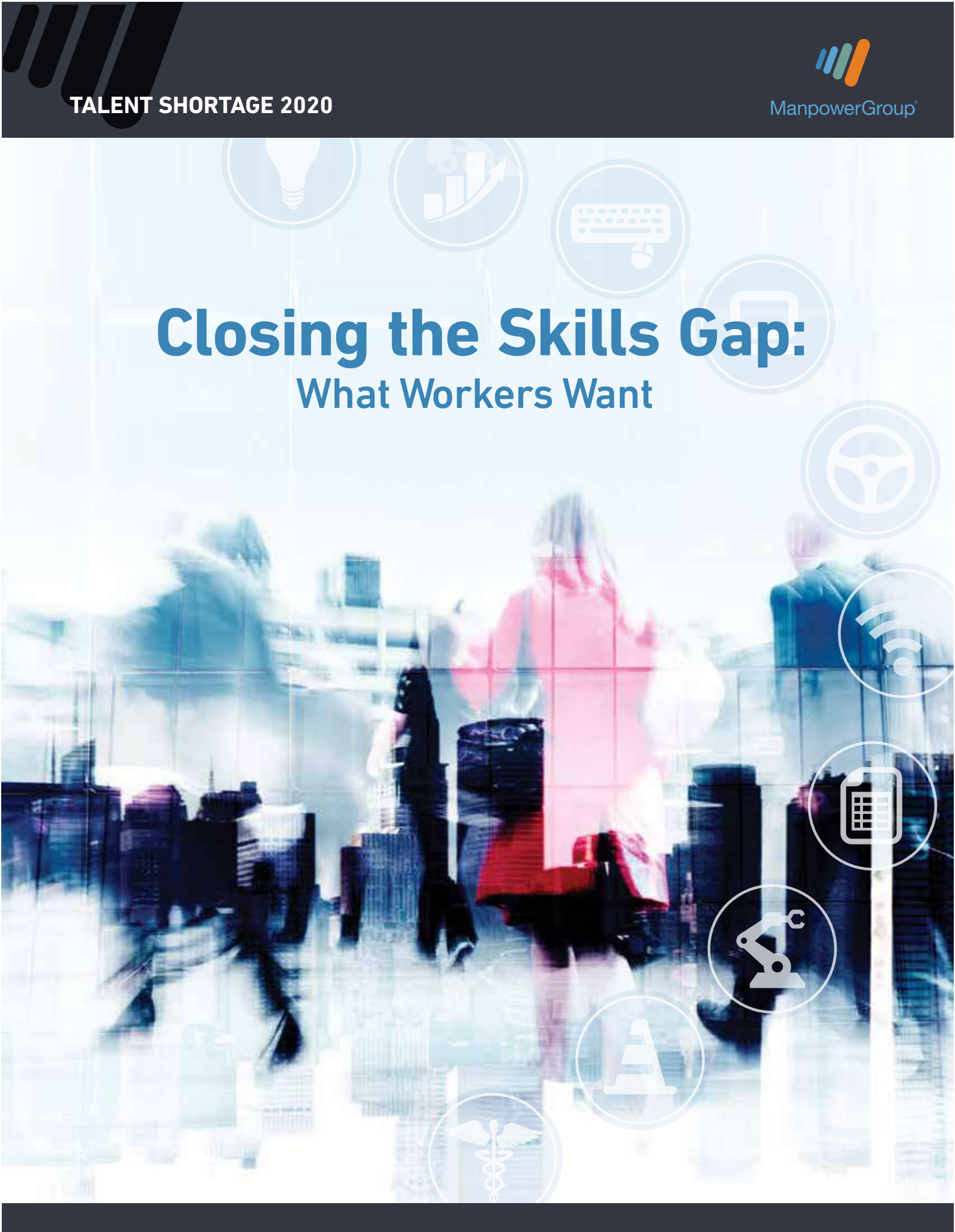


Closing the Skills Gap:

What Workers Want





Chairman & CEO,
ManpowerGroup

Unprecedented times are the new normal. Globally, the labor market is tight. Talent shortages are at record highs, unemployment at multi-decade lows. The voice of the consumer – employee and candidate – is ever stronger and the role of organizations under increasing scrutiny. We need new solutions for the future of work and the future for workers.

More than half of companies around the world cannot find the skills they are looking for – almost double what it was a decade ago. As the pace of technological disruption, digitization and automation continues to accelerate, most employers globally are increasing or maintaining, not reducing their headcount¹. And as skills needs and job roles are changing faster than ever, the need for a Skills Revolution – which we predicted four years ago – continues to be the defining challenge of our time. In an increasingly technology-enabled world, people are in demand.

To find, build and sustain the best talent while others are trying to do the same, companies need to know What Workers Want. They need to shift their workforce demands closer to match the needs and desires of in-demand talent and expand the pool from which they source that talent.

Organizations must act differently. Creating shareholder value can only be done in conjunction with taking care of employees, customers and communities. And that includes the responsibility to help people learn new skills, adapt for future jobs and become creators of talent.

India Talent Shortages...



... up by 7 percentage points

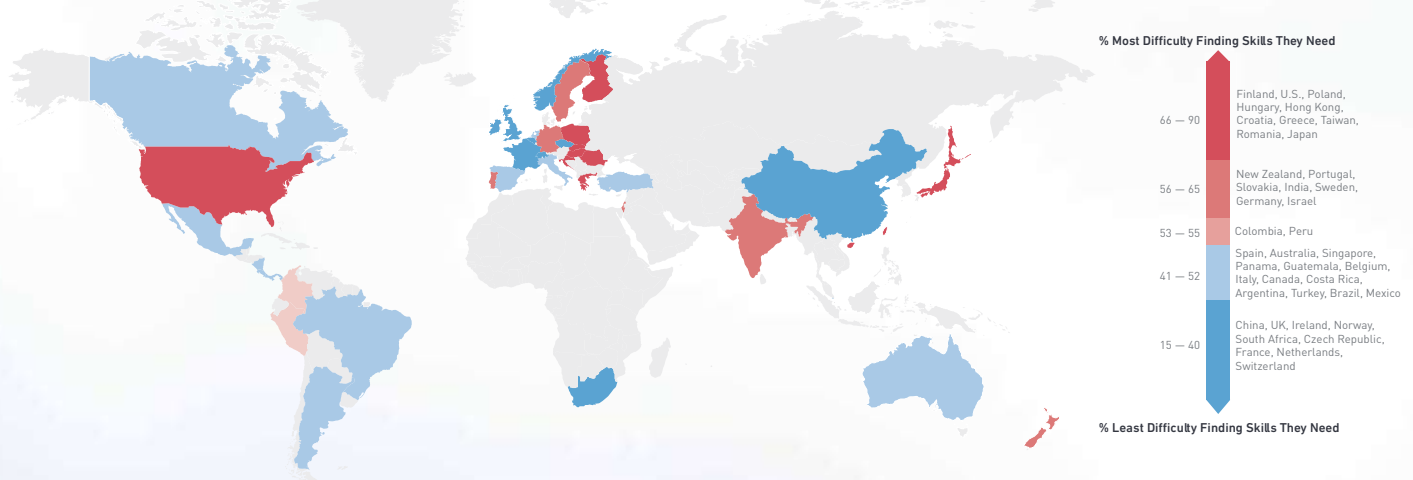
About This Report

As the leading workforce solutions company, ManpowerGroup finds sustainable employment for nearly 3 million people across the world every year. With the largest global footprint in the industry, we work with almost half a million companies in over 80 countries and territories. To find out What Workers Want, we surveyed 14,000 individuals across 15 countries to understand what attracts them to an organization, what keeps them there and how that varies by geography, gender and at different stages of their career. This report combines our unique insight with 13 years of data from our global Talent Shortage Survey, the largest human capital study of its kind.

¹ Humans Wanted: Robots Need You, ManpowerGroup, 2019

Talent Shortages Growing Around the World

Talent shortages are increasing around the world, with greatest year-over-year increases in the U.S., Sweden, Finland, Hungary and Slovenia. Only 18% of countries are not reporting talent shortages.



The Skills They Are A-Changin'

The top ten most in-demand roles in 2019 are trending year over year: 80% of them were also in short supply in 2018 in India. Healthcare professionals in the top ten reflecting an aging population. Meanwhile quality controllers, technical staff, and production and machine operators fall out of the top ten reflecting the rise in automation of routine tasks.² And as technology disrupts work, the most in-demand roles may look similar yet the skills required continue to evolve rapidly.

SALES & MARKETING

(sales representatives/managers, graphic designers)

IT

(cybersecurity experts, network administrators, technical support)

ENGINEERING

(chemical, electrical, civil, mechanical)

ACCOUNTING & FINANCE

(certified accountants, auditors, financial analysts)

HEALTHCARE

(doctors, nurses & other non-nursing health professionals)

TEACHERS

SKILLED TRADES

(electricians, welders, mechanics)

MANAGEMENT / EXECUTIVE

(department leaders, function heads)

PROFESSIONALS

(non-IT project managers, researchers, lawyers, procurement)

HOSPITALITY

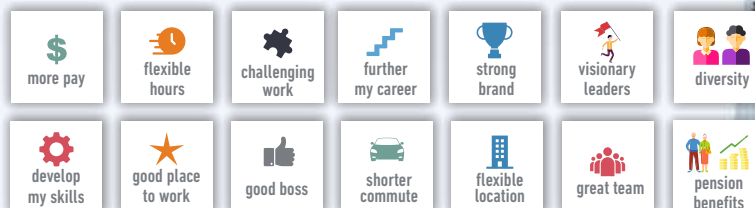
(restaurant and hotel workers)

² Tech Experts Predict 14 Jobs that Will be Automated by 2030, Forbes, 2019

TELL ME WHAT YOU WANT, WHAT YOU REALLY REALLY WANT

What Workers Want: Throughout Their Career

One size really does fit one. What Workers Want varies by age, gender and geo, and where they are in their career lifecycle. More pay, flexibility and challenging work are non-negotiables to all. But there are additional levers employers pull to attract and retain in-demand and diverse talent.



Millennials (age 25-34)

Flexibility Is Critical for Her and Still a Nice to Have for Him

Millennials want the *same, same but different*. Both women and men want flexibility, career enhancement, more pay, and skill development. They understand they have a career ultra-marathon ahead of them and want to achieve a One Life balance for the long run.⁴ For women though, to pursue challenging work, it must come with flexibility. They continue to do most of the emotional labor and unpaid work at home – balancing work around commitments.⁵ Flexibility is critical for her and still a nice to have for him.

Attract:

WOMEN	MEN
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Retain:

WOMEN	MEN
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.



Gen Zs (age 18-24)

Money Matters Most, Especially to Women

Gen Zs are ambitious, hungry for cash and career development, yet already, women and men have differing desires. Women rank pay higher than their next priority — work environment — while men say skills and career matter more than pay. As more college-educated women than men enter the workforce for the first time after decades of unequal pay, women know their rights and money matters.³

Attract:

WOMEN	MEN
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Retain:

WOMEN	MEN
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

I want more time to learn on the job, and coaching around what to learn and which skills to develop



Gen Xers (age 35-54)

*For Anyone Who Cares:
Flexibility = Well-being*

This is when the quest for balance starts to kick in. Men prioritize flexibility more than women. They want a flexible start and finish to their day, the ability to work remotely some, not all of the time and they want their share of parental leave.⁶ With 52 million U.S. working parents,⁷ 65.4 million EU households with children⁸ and with elder care on the rise,⁹ flexibility is more than a hygiene factor for both genders.

At 55, I want to learn for personal development to stay stimulated, relevant and motivated, less so for professional development

Boomers (age 55-64)

Loving Leaders and Teams, Learning Less So

Female Boomers are more attracted to challenging work over pay. Male boomers continue to look for career growth and more pay as well. They are more likely to be engaged if their jobs involve flexible hours for men vis-a-vis a good boss for women. Employers cannot rely on promotion or remuneration as workers age, they need to diversify and segment their learning strategies to engage boomers intent on working longer and later.

Younger Boomers (55-64)

Attract:

Retain:

WOMEN	MEN	WOMEN	MEN
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.
4.	4.	4.	4.
5.	5.	5.	5.

I want to learn new skills to earn more in the future

I want to improve current performance and earn more today. Instant gratification? I guess!

Younger Xers (35-44)

Attract:

Retain:

WOMEN	MEN	WOMEN	MEN
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.
4.	4.	4.	4.
5.	5.	5.	5.

Older Xers (45-54)

Attract:

Retain:

WOMEN	MEN	WOMEN	MEN
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.
4.	4.	4.	4.
5.	5.	5.	5.

³ Graduation Rate, OECD, 2018

⁴ The Integration of work and home and the flexibility to manage that. #GigResponsibly, The Rise of NextGen Work, ManpowerGroup, 2018

⁵ Gender Equality, OECD, 2018

⁶ Well-being at Work, ManpowerGroup Research by Reputation Leaders, 2019

⁷ Your Company Needs a Better Retention Plan for Working Parents, Harvard Business Review, 2019

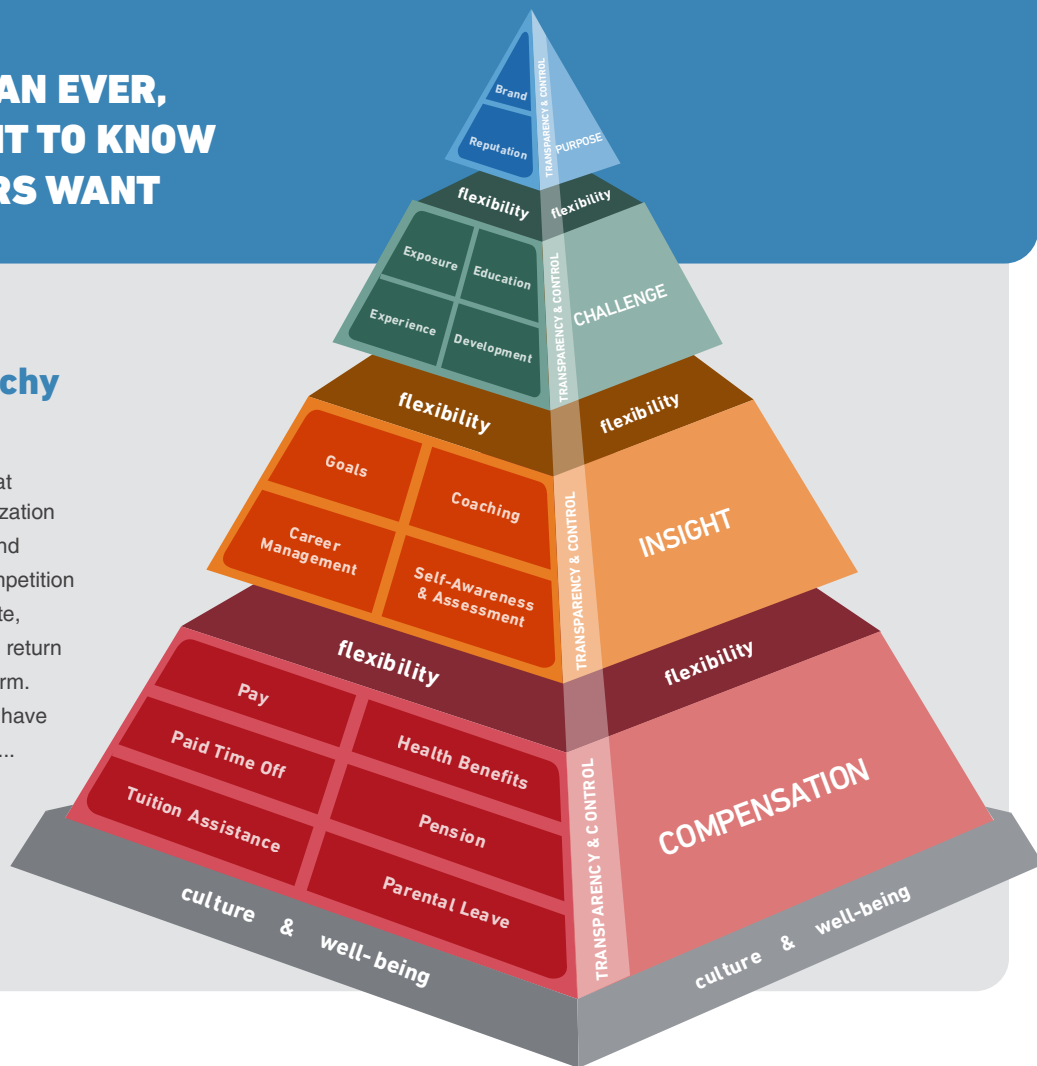
⁸ Households with Children in the EU, Eurostat, 2018

⁹ What Does the Future Hold for Senior Care, National Council for Aging Care, 2019

NOW MORE THAN EVER, IT'S IMPORTANT TO KNOW WHAT WORKERS WANT

~~My Own~~ Maslow's Hierarchy of Needs

Get it right the first time. What attracts workers to an organization can also be what engages and makes them stay. When competition for talent and skills is so acute, getting it right up front brings return on investment for the long term. Move over Maslow, workers have their own hierarchy of needs...



1 No Spoiler Alert Necessary: Pay Always Matters – But How It's Delivered Matters More

Pay is the top attraction and retention factor for all workers under 65-years-old, regardless of gender. Fact. Yet wages are growing half as quickly as they were 10 years ago especially for lower earners.¹⁰ Averages can of course be deceiving. Skills matter: workers with in-demand skills – cybersecurity, cloud computing, front end developers, solutions architects, healthcare and more – have seen salary increases of over 10% in the same time period¹¹. Companies have to get creative to enhance compensation beyond cash to differentiate and attract talent. When 89% of people in the U.S. would consider additional benefits over more pay, popcorn and ping pong are not the answer¹². Think personalization: autonomous working and flexibility, parental leave and unlimited time-off/unplug policies to cultivate sought after well-being and improved lifestyle. Add attractive financial incentives and goodwill gestures that reward loyalty, learning and development like tuition reimbursement and student loan repayments – companies will be more likely to attract and retain the best talent¹³.

89% of people in the U.S. value additional benefits as much as pay¹²

¹⁰ Rising Employment Overshadowed by Unprecedented Wage Stagnation, OECD, 2018

¹¹ Friday's Jobs Report: Which Jobs are Seeing Wage Growth?, Glassdoor, 2016

¹² The Most Desirable Employee Benefits, Harvard Business Review, 2019

¹³ Student Loan Repayment is the Hottest Benefit of 2018, Forbes, 2018



2

Workers Want Personalization: People Strategy Must Be Both a Science and an Art

In an increasingly data driven world where algorithms in fridges know this and AI is suggesting you buy that, people expect the same from work. They want assignments that test their abilities, projects that demand the best from them and recommendations on the next role. They want insight and advice on fit today and potential tomorrow.

This is where assessment comes in – critical for understanding human potential. It allows employers to better match and motivate people while helping individuals to get to know even more about themselves. Assessment can remove bias and over-reliance on Applicant Tracking Systems (ATS) that automatically sift suitable candidates out. And it helps employers fish from a more diverse talent pool, selecting people not on past experience but on the basis of future potential.

Like all consumers, workers also want a great user experience. They want personalized insight to understand their strengths and potential – as personalized as their Amazon Prime. For this they need assessment short, gamified and scientifically validated and they expect something in exchange for their data. They want career conversations and coaching to set goals, manage their development and control their career.

Yet when only 76% of workers in India have been assessed, it really is time to let the data do the talking – 94% of those who have been assessed report higher job satisfaction versus 81% of those who have not.

Only 76% of workers in India have been assessed, yet 86% say their manager understands their skills. Go figure (or just guess...)

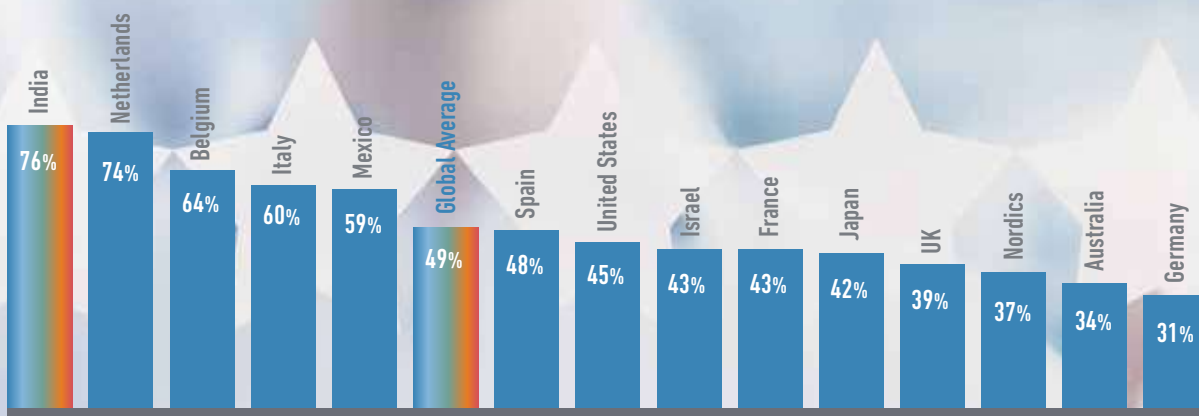


“Science-based assessments are the most accurate and reliable tool for placing the right person in the right job. Adding a well-designed interview will increase predictive accuracy by around 15%, but most of the qualities interviewers try to infer can be more effectively evaluated with assessments.¹⁴ As well as testing technical skills, assessments measure human strengths that are critical predictors of success such as how rewarding someone is to deal with, their ability to do the job and their willingness to work hard. That’s the science part.”

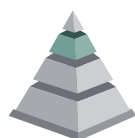
Dr. Tomas Chamorro-Premuzic
Chief Talent Scientist
ManpowerGroup

Hindsight Is Not Insight:

Almost half of employers are using assessment data versus gut instinct to predict performance and potential



¹⁴ What if We Killed the Job Interview, Fast Company, 2018



3

Variety is the Spice of Work Life: Workers Want Education, Experience, Exposure

Challenge is a top five priority for workers of all ages and means a multitude of things. Education and training, yes, but more than that: stretch opportunities; rotational assignments; on-the-job learning and apprenticeships; stimulating projects and agile work across various teams and functions; applying fresh skills in new roles; thinking harder; feeling more tested; being on a clear career pathway from this job to next.¹⁵

People want portfolio work that offers variety, broadens their experience and builds knowledge and skills. They want the opportunity to develop and to earn more. They are realizing they need a long shelf life in this fast-changing, career-marathon world of work.

To deliver challenge and opportunities so people succeed and stick around, managers need to understand skills, potential and desires. With assessment, insight and a culture of learnability they can coach individuals so they thrive in a supportive environment. A sink-or-swim approach, without support, can result in procrastination paralysis or even burnout. The eager entry-level graduate seeking stretch will need different support compared to the mid-career emerging leader. Managers need coaching skills to guide people to choreograph career conversations that pace their own career mobility, embrace new experiences and welcome the exposure that drives personal and business success.

*Employees whose manager listens to their work-related problems are **62% less likely to burnout**¹⁶*



Our ability to continuously learn is the most important skill we'll need to succeed in the jobs of today and tomorrow. As leaders, it is our responsibility to foster a culture of learnability, which requires leaders to be coaches, increasing and accelerating career mobility and creating relevant and curated learning pathways, not one-size-fits-all. Dedicate time for learning, so they can fulfill their potential in their current roles and equip them to be relevant for future roles.

Michelle Nettle, Chief People & Officer, ManpowerGroup

¹⁵ Your Workforce is More Adaptable Than You Think, Harvard Business Review, 2019

¹⁶ How Managers Can Help Employees Avoid Burnout, Fast Company, 2018

¹⁷ Talk the Talk: How Ongoing Career Conversations Drive Business Success, Right Management, ManpowerGroup, 2016

Creating a Culture of Learnability

More employers than ever know they need to upskill and reskill their workforce and many are taking it on themselves.¹⁸ But awareness, intent and even online learning portals are not enough. Almost four-fifth of organizations offer free training, but workers say they also need the time, support and guidance to capitalize on it. Companies need to boast a *Culture of Learnability* to attract and retain top talent, and to encourage all of their workforce to engage in continuous learning, not just those who would have upskilled anyway. Managers also need to understand how their people's motivations for learning vary depending on where they are in their career life cycle and the wider responsibilities they have to balance. When time, money and lack of support are the biggest obstacles to learning, workers want dedicated time on the clock to learn, swift results and a return on their investment of that time.

1. TAKE IT FROM THE TOP:

The CEO needs to be the Chief Learning Officer and leadership need to quench their thirst for learning too.

2. BE EXPLICIT AND RAISE AWARENESS:

Help people understand their Learnability QuotientTM and know what kind of learner they are!⁹

3. ALLOCATE TIME FOR LEARNING:

It's a worker's biggest barrier to skilling up.

4. DEDICATE RESOURCES:

Invest in learning platforms and offer on-demand, snackable options, and combine online and digital with face-to-face and peer-led learning.

5. DESIGN RELEVANT LEARNING PATHWAYS:

Link learning at all levels to people's existing and potential roles in-line with what the company needs today and tomorrow.

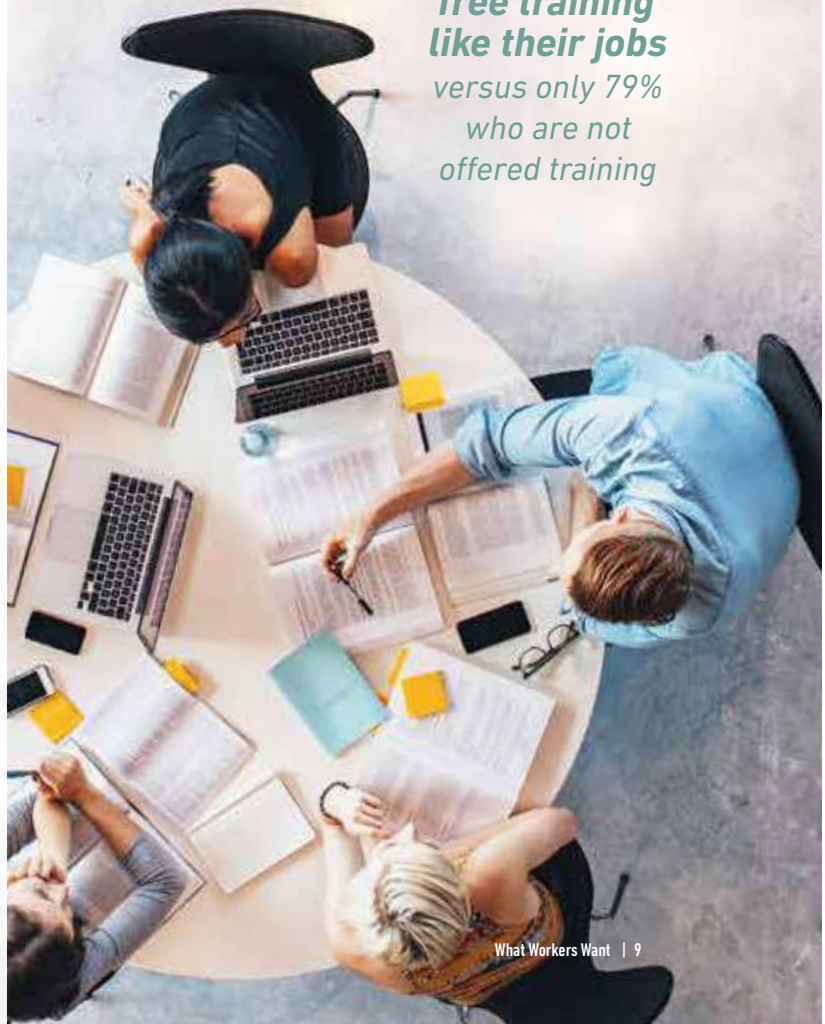
6. INSIST ON CAREER CONVERSATIONS:

Continuous learning needs regular coaching and nurturing beyond the annual performance review.

¹⁸ Humans Wanted: Robots Need You, ManpowerGroup, 2019

¹⁹ The desire and ability to quickly grow and adapt one's skill set to remain employable throughout their working life. Check your LQ at: <https://www.learnabilityquotient.com/>

93% of employees
who are offered free training like their jobs
versus only 79%
who are not offered training





Workers with control over their schedules report greater job satisfaction and lower levels of burnout and stress²⁴

4 Flexibility and Well-being Combined Are Priceless: Productivity Beats Presenteeism

Workers are prioritizing balance and choice and it's non-negotiable. People want to choose where, when and how they work, and that doesn't mean millennials logging on in coffee shops. They want the social aspect of work with the flexibility to accommodate the demands of One Life, the sharing of caring and the desire to boost their well-being.²⁰

People want flexibility — and that means all things to all women and men so employers need to loosen up. Non-traditional work hours with flexible start and end times that counter the rush hour and control the commute.²¹ Work from Home (WFH) and Work from Wherever (WFW). Time to hustle and enjoy side gigs to nurture entrepreneurialism and boost pensions. Condensed four-day work weeks or five-hour workdays that peak productivity and preserve the weekend, and parental leave that balance family and care and can be worth more than pay.²²

To tap the whole talent pool and retain a well workforce, employers must strike the balance of flexibility and reward productivity over presenteeism. Culture must promote it and leaders must model it and the consequence of workplace equality may well kick in too as a result. Happiness off the job can be key to happiness on the job.

In the UK only 6% of the workforce still does a 9-5 working day²³



India, Australia, Mexico, UK and the U.S. have the most purpose-oriented workforce driven by brand and reputation



5

Tell Me About It.
This Is a Purpose Economy and Bragging Rights Matter

Workers want to be proud of who they work for and take pride in what they do. Strong brands, solid reputation, great place to work and an opportunity to make an impact are in the top ten reasons to work for an organization. How life looks on LinkedIn is just as important as how it looks on Insta.

²⁰ #Gig Responsibly – The Rise of NextGen Work, ManpowerGroup, 2017

²¹ Finland is Taking a Radical New Approach to Flexible Working, World Economic Forum, 2019

²² It's Time to Switch to a Four-Day Working Week - Say These Two Davos Experts, World Economic Forum, 2019

²³ Over Nine in Ten Not Working the Usual 9-5 Week, YouGov, 2018

²⁴ Workplace Flexibility Benefits Employees, American Sociological Association, 2016

In this hyper-transparent age people want to buy from brands with a wider social purpose that align with their values – think Ben & Jerry's, Chobani and Dove, Bombas, Patagonia and TOMS. And they want to work for them too.²⁵ Companies with purpose and a commitment to people, the communities in which they operate, and the planet are in-demand. And aspiring to meaningful work and purpose is by no means just a young person's game — it's of greatest importance to the over 65s and of least importance to Gen Z.²⁶ But when the purpose is not so well-known and the brand not so strong, companies need to work harder to tell their "Why."²⁷ With 45% of the global population on social media, people have more visibility than ever into the careers of friends and strangers.²⁸ Companies need authentic employee endorsement. Even the strongest brands can be nudged to take a stance if their people speak up: Google employees on harassment, Amazon's Prime Day on working conditions, and Twitter, Microsoft and many more on Action for Climate. Online reviews, peer ratings and rankings are replacing IRL (In Real Life) word of mouth recommendations. Companies need to meet current and future employees where they are at and work hard to achieve the Glassdoor recommendations, Net Promoter praise and authentic endorsements across channels that can brand build and rally their reputation.

²⁵ Nine Reasons Why That High Paying Job is Making You Miserable, Fast Company, 2019

²⁶ Gen Z @ Work: How the Next Generation is Transforming the Workplace, David Stillman, 2017

²⁷ Start with Why, TED Talks, 2014

²⁸ Number of Social Network Users Worldwide from 2010-2021, Statista, 2019

HOW TO GIVE WORKERS WHAT THEY WANT:

Talent can call the shots and employers need to shift their demand closer to match the supply. They need to understand people's needs and desires to attract, engage and retain the best talent while others are trying to do the same in a tight labor market. Getting it right up front brings return on investment and retains and develops talent for the long term.

- 1 **Get creative about compensation** – pay matters but so does quality of life. Reward people well to help meet their needs wherever they are in their career journey.
- 2 **Assess for fit and potential** – provide people with the insight they need to thrive and you'll end up with more motivated and satisfied workers.
- 3 **Build a Culture of Learnability** – give workers the challenge they crave and the support they need to grow and succeed.
- 4 **Create Flexibility for One Life** – wherever people are in their career life cycle — it drives well-being and productivity too.
- 5 **Be more than transparent about your Why** – be explicit and authentic about the purpose and meaning in your company's mission and ensure leaders live it.



ABOUT MANPOWERGROUP

ManpowerGroup, the world leader in innovative workforce solutions, has been helping clients and candidates win in India since 1997. ManpowerGroup India provides unique value to clients and candidates through a comprehensive suite of innovative solutions, which cover an entire range of talent-driven needs from recruitment and assessment, training and development, and career management, to outsourcing and workforce consulting. This is the Human Age, where access to talent has replaced access to capital as the key competitive differentiator. ManpowerGroup India creates powerful connections between organizations and the talent they need to enhance their competitiveness and unleash their workforce potential.

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ABOUT THE RESEARCH

ManpowerGroup commissioned two-part research to understand attitudes towards work from individuals, and talent shortage challenges across organizations.

Reputation Leaders conducted a quantitative global study of 14,091 workers balanced 50/50 across genders in 15 countries across all industry sectors. Respondents were aged 18-79 and included full-time workers (78%), part-time workers (13%) and gig workers (12%) from organizations of all sizes and at all levels of the company from entry level and individual contributors to senior management and C-suite. Fieldwork took place in December 2018 in Australia, Belgium, France, Germany, India, Israel, Italy, Japan, Mexico, Netherlands, Norway, Spain, Sweden, UK and US.

Infocorp carried out quantitative research with 24,419 employers across six industry sectors in 44 countries and territories: Argentina, Australia, Austria, Belgium, Brazil, Bulgaria, Canada, China, Colombia, Costa Rica, Czech Republic, Finland, France, Germany, Greece, Guatemala, Hong Kong, Hungary, India, Ireland, Israel, Italy, Japan, Mexico, Netherlands, New Zealand, Norway, Panama, Peru, Poland, Portugal, Romania, Singapore, Slovakia, Slovenia, South Africa, Spain, Sweden, Switzerland, Taiwan, Turkey, UK and USA.