

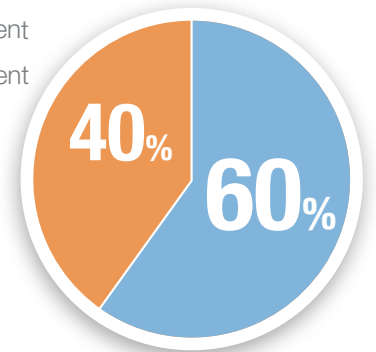
Informal Workforce: Real Gig Economy

Introduction

The Gig Economy as it's currently defined by most is composed of both informal and non-informal contingent workers. ManpowerGroup Solutions recognized that there are two unique subsets under the umbrella of contingent work, those with and those without formal contracts for employment. The true 'Gig Worker' is a contingent worker with no formal contract who earns compensation on a per job, or per gig, basis. In the 2017 Total Workforce Index™ we separate these two subsets of the workforce and take a closer look at the growing informal workforce and related trends.

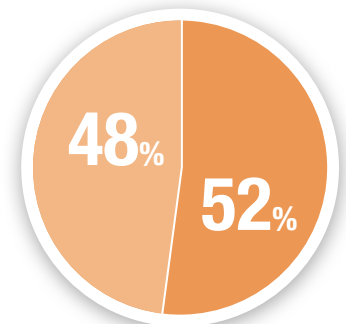
Total Workforce

- Permanent
- Contingent



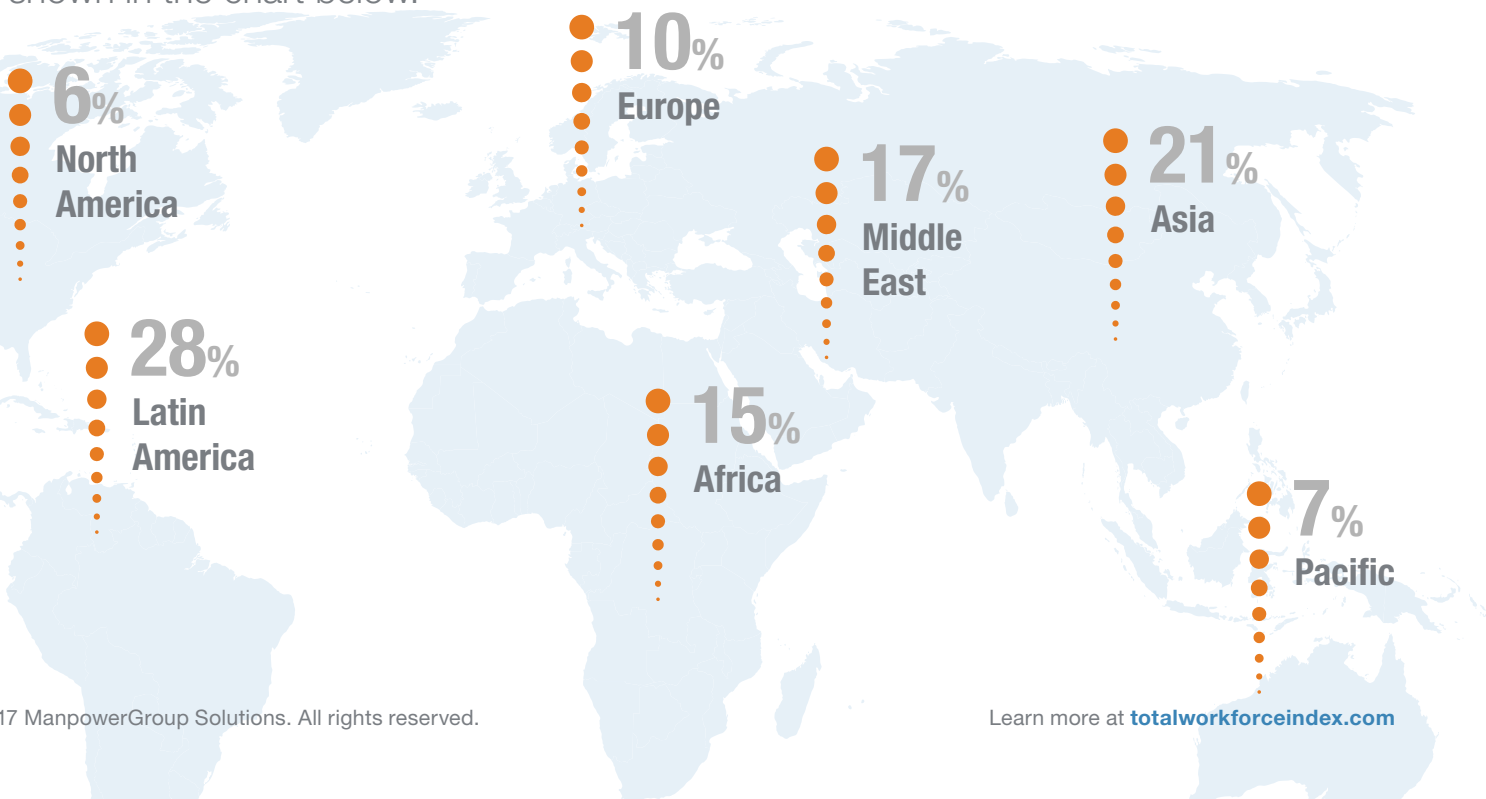
Contingent Workforce

- Informal
- Other



2017 Total Workforce Index™ Regional Data

The average percentage of the informal workforce, relative to the total workforce at a regional level is shown in the chart below.



Emerging Markets Embrace Informal Work Opportunities

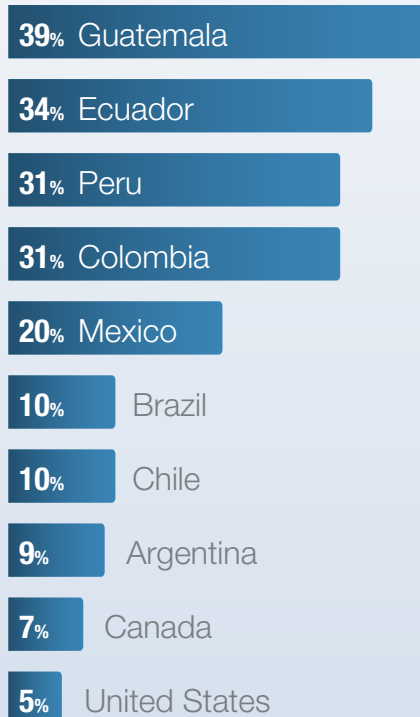
While the mature markets have embraced the informal worker, it is the emerging markets where the informal worker is dominating the contingent workforce landscape. Countries like Bolivia, Honduras and Nicaragua have informal workforce populations of 44% or more; and in the case of Bolivia just fewer than 50% of the total workforce. Thailand and Vietnam feature the highest percentages in the APAC region at 42% and 43% respectively. The markets in the Americas and APAC regions dominate the top 15 markets relative to informal workforce populations.

Gender Participation Gap

In countries like India, increased female participation in the informal workforce is already promising increased female participation in the total workforce. Closing the gender participation gap by 25% by 2025 has the potential to add US\$ 5.8 trillion to the global economy. Furthermore, by 2020 it's predicted that up to 50% of the U.S. workforce could be informal. However, in the UK roughly two out of every three informal workers are male. These numbers are anticipated to shift as more women take advantage of opportunities in the informal job market.

Estimated Percentage of Informal Workforce as a percentage of Total Workforce

Americas



EMEA



APAC

