

THE WORKFORCE OF AUSTRALIA INSIGHTS 2015/16

INTRODUCTION

An in-depth understanding of today's labour market can take the hit-and-miss out of sourcing quality workers. With the relevant information at hand, it becomes clear why some positions are harder to fill than others, and why certain companies find recruitment more straightforward. One of the most valuable roles of a recruitment professional is to provide an insight into today's labour market – both for employers and job seekers. The recruiter has a unique understanding of the candidate pool and what they want specific to their industry and occupation, as well as common career goals and elements of job satisfaction.

This document provides an insight into the national workforce at present - where the talent is and how best to nurture it. Planning ahead is essential to manage potential shortages, whether this means developing entry-level personnel or looking at transferable skills in the marketplace.

Great talent attracts industry competition, and a business's capacity to recognise and deliver on what workers want is essential to being an Employer of Choice in that sector. This can be a lengthy process, but the rewards lie in a thriving, engaged workforce.

Developing a diverse workforce can relieve staffing difficulties, improve team morale, boost organisational creativity and enhance company branding.

We look forward to discussing this document with you in further detail and offer our services to work together to develop a plan that draws on the best of the Australian workforce - today and beyond.

The ESH Group, through its companies, IPA and ESG, has a mission to positively impact people.



IPA has over thirty years' experience providing workforce and career solutions that help organisations and individuals succeed at work.

Our service offering is designed to assist you in achieving your business goals through the attraction, selection and retention of an engaged and productive workforce.

Our core services include Recruitment, Flexible Workforce Solutions, Diversity Consulting, Training Solutions and Outplacement.



Employment Services Group (ESG) helps people develop their capacity to achieve lasting employment and provides expert workforce solutions to employers.

We deliver a range of services to organisations of all sizes, many of which are funded by the Australian Government through jobactive

Our services include Professional Recruitment Services, Post Placement Support, Diversity Consulting and Coordinated and Customised Assessment, Training & Induction programmes.



jobactive is the Australian Government's way to get more Australians into work. It connects job seekers with employers and is delivered by a network of jobactive providers in over 1700 locations across Australia.

Employers can access a range of services. Through jobactive providers such as ESG, employers can access to no-cost recruitment and wage subsidies to connect them with unemployed job seekers.

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15,759,200 WORKING POPULATION (aged 15-64)

6.3%
Unemployment

46%
Female
Workforce

15%
Aged 15-24

32%
Regional
Employment

30%
Cert III or Higher
VET Qualification

13.6%
Youth
Unemployment

31%
Part-time
Workforce

39%
Aged 45+

29%
Bachelor Degree
or Higher

34%
No Qualification
after Year 12

TOP 12 EMPLOYING INDUSTRIES

Industry	Number of people employed
Healthcare & Social Assistance	1,435,700
Retail Trade	1,238,000
Construction	1,037,500
Professional, Scientific & Technical Services	972,300
Education & Training	924,700
Manufacturing	917,200
Accommodation & Food Services	818,500
Public Administration & Safety	732,200
Transport, Postal & Warehousing	606,600
Other Services	481,000
Financial & Insurance Services	410,800
Administrative & Support Services	392,800

NATIONAL WORKFORCE

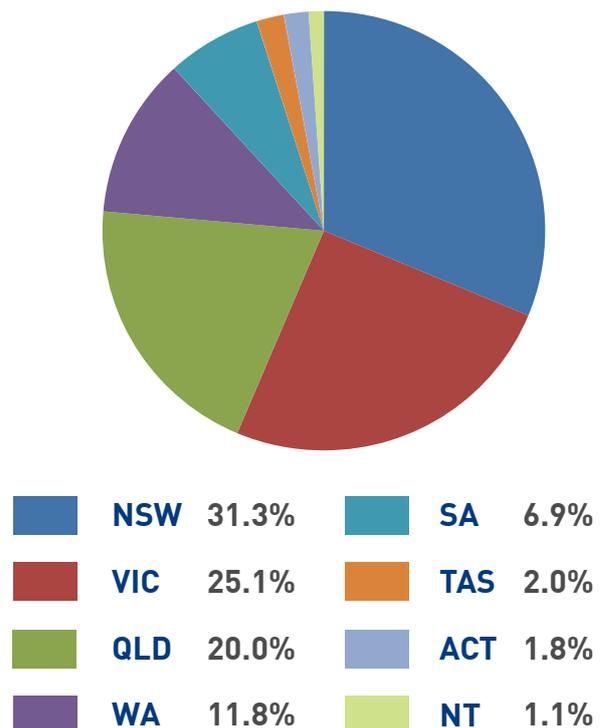
Australia's labour market is showing signs of strengthening, despite pervasive media commentary that business should approach growth and opportunity cautiously. 17 of the country's 19 industry sectors are predicted to continue robust growth. More than 750,000 new jobs were created in the last five years, and a total of 1.1 million new jobs will be created Australia-wide over the next 5 years. Service and consumer-driven sectors will remain particularly strong until at least the end of the decade, fuelled by an aging population, increased impetus on workforce participation, larger capital city populations and a weaker Australian dollar.

There has been a reduction in full-time employment, and fewer entry-level opportunities in market sectors such as retail, which traditionally employ young people.

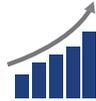
In this climate, recruitment professionals are central to matching select candidates with jobs across all industries, promoting high-profile opportunities as well as those less familiar to job seekers. They can integrate training components into their induction processes, coordinate secure hours where possible and work in partnership with businesses to mentor new arrivals. There is also support available to help employers take on unemployed workers.

Through the federal government's new jobactive initiative employers can access, with a range of services, wage subsidies and training allowances for eligible placements.

DISTRIBUTION OF NATIONAL WORKFORCE



2019 Industry Projections



Industry projections between now and 2019 are representative of a growing ageing population, increased spending confidence, a boost in residential and public infrastructure investment and a transition by several of the states towards a service-driven economy, away from traditional resources and production.



The mining sector is expected to continue workforce reduction as the sector moves away from construction to less labour intensive production.

2019 Occupation Projections

At just over 22% of the national workforce, Professionals are currently the largest occupational group in Australia. This group is employed across most knowledge, research and service sectors, and generally hold a Bachelor's Degree or VET Diploma qualification as a minimum.



Projections towards 2019 indicate that community and personal service workers will increase their occupational share the fastest as a result of growth in the health care and social assistance industry. Manual and general administrative occupational numbers will grow the least, reflecting a transition to a services-based economy.

A current or expected abundance of workers in any category is not an indication that sourcing candidates will be easier, as levels of experience vary, and growth in demand from other businesses would be similarly expected. Recruiters can assist employers to plan ahead for growth and shortfalls by identifying candidate career drivers and the qualities employers will need to foster to increase their attractiveness.

Skills Shortages and Difficulties

Australia's Skills Shortage List is dominated by shortages in trade, technician and health professional roles. Recent increases in construction activity, together with steady population growth across all states and territories, have exacerbated these shortfalls. Challenges exist where there is limited interest or availability of training, a need for advanced expertise, and when the labour market restructures.



Skills Shortages

A Skills Shortage occurs when there are not enough workers statewide with essential skills or qualifications required for that occupation.

- Child Care Centre Manager
- Surveyor
- Quantity Surveyor
- Sonographer
- Optometrist
- Audiologist
- Midwife
- Automotive Electrician
- Motor Mechanic
- Sheetmetal Trades Worker
- Metal Machinist (First Class)
- Panelbeater
- Bricklayer
- Stonemason
- Solid Plasterer
- Roof Tiler
- Wall and Floor Tiler
- Baker
- Arborist
- Hairdresser
- Cabinetmaker



Recruitment Difficulties

A Recruitment Difficulty indicates that there are generally sufficient supplies of skilled workers statewide but employers face sourcing challenges due to local industry conditions and worker preferences.

- Medical Diagnostic Radiographer
- Physiotherapist
- Construction Estimator
- Glazier
- Plumber
- Pastrycook
- Butcher/Smallgoods Maker

Workforce Underutilisation



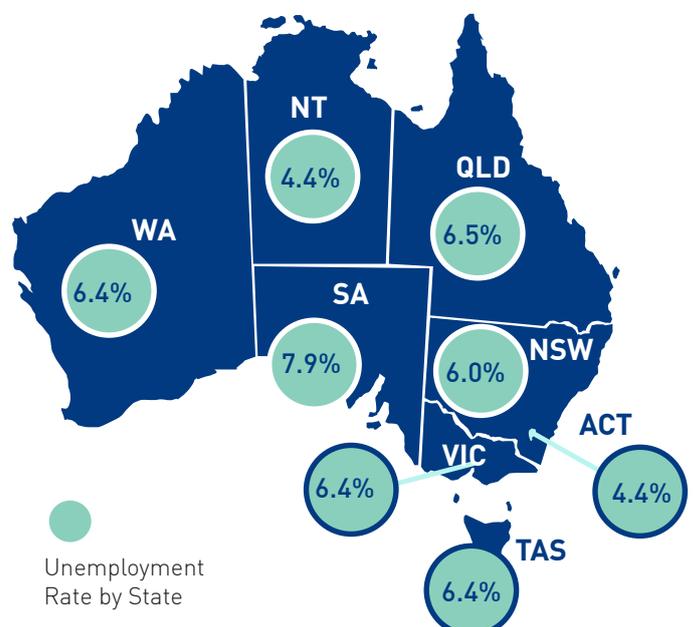
Talent availability in Australia ranges from known shortages to oversupply. The unemployment rate in Australia is the highest it has been since 2002. The underutilisation rate has been increasing gradually since 2008. Workforce underutilisation represents the share of the labour force which is unemployed and underemployed. Underemployed people are part-time workers who would prefer more hours, and are available to work more hours.

Part-time employment has been steadily increasing since the 1970s, when only 10% of jobs were part-time. In the three years to February 2015,

- 69% of all new jobs created were part-time, and
- 30.8% of all employment in that month was reported as part-time.

Flexible and shortened hours are accessible ways to provide more workers with valuable experience and can be an ideal approach to managing seasonal demand. However, there is also a risk of not utilising individuals to their full potential. Recruiters can work with employers to identify candidates' needs and preferences related to their working schedules, in order to find the best balance between quantity and quality of talent.

Each state and territory faces a challenge to optimally engage skilled and aspiring workers, where enough full-time opportunities are available in the fields in which people are qualified to work.



Workforce Diversity Practices

Diversity is emerging as one of the key priorities for employers in Australia, not only to enhance company branding but also to build a harmonious, progressive working environment. Diverse teams are a true reflection of the local and national communities in which businesses operate.

Diversity can include gender representation, career flexibility for working parents, sexual identity, socioeconomic status, age, ability and cultural origin.

Research indicates that companies who find workforce diversity and inclusion challenging are not lacking interest or motivation to implement changes, they just need support to establish a strategy and placement targets.

One consideration to be aware of when building a diversity strategy is the difference between “feeling included” and “being inclusive.” Both are essential. The former describes employees’ ability to participate fully as their real selves, as opposed to the latter which is more a reflection of company policy. Feeling included has a real impact on a business’ financial performance: employee engagement and productivity is shown to increase when individuals work in an open, accepting environment.

It is not difficult to see how these considerations can make diversity recruitment a challenge. Increasing headcount is just the start – new employees thrive best in a team which is trained to accept and embrace differences.

Working with a recruiter can assist with identifying those aspects which are a priority for the employer, and forming a plan to make their diversity goals a reality.

Steps Towards Workforce Diversity

- Build strategies to address unconscious bias in the recruitment process
- Practise openness, recognising a group’s typical thinking style, as well as how they deal with differences
- Reward inclusive behaviour by providing incentives and working towards key performance indicators that support diversity
- Build trust and psychological safety within teams
- Review existing recruitment policies to identify potential barriers to employment for target cohorts
- Consider alternative candidate engagement options in partnership with the recruiter, such as open days, community presentations or radio interviews?
- Create apprenticeships, cadetships or scholarships as opportunities to attract and develop new talent

People with a Disability

The disability unemployment rate is typically double that of the general unemployment rate. This can be largely attributed to a gap in workers’ needs, aspirations and the opportunities made available to people with a disability.

A proactive recruitment strategy can change perceptions that accommodating people with a disability is too difficult. Government initiatives such as DES and JobAccess can assist with advice and funding for workplace adjustments.

The Australian Capital Territory and Northern Territory have the highest workforce participation rates for people with a disability, followed by Western Australia and Queensland.

People with a disability are represented across all industry sectors in Australia. The largest occupational group, Professionals, work predominantly as teachers and nurses. The National Disability Scheme estimates that, by 2022, disability employment can fill about 15% of the projected shortfall in the labour force caused by the expected reduction in full-time hours and increased retirement.



Benefits of Employing People with a Disability

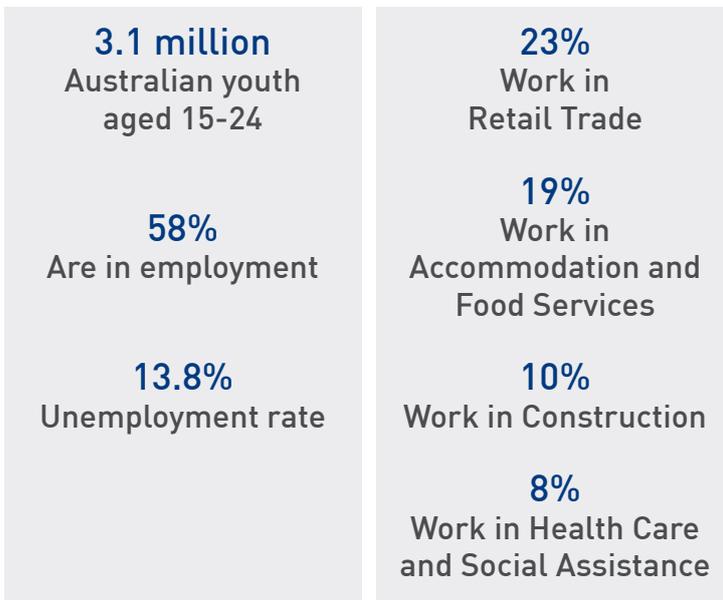
- ✓ Recruitment practice leadership
- ✓ Fewer WHS incidents
- ✓ Improved workplace morale and satisfaction
- ✓ New ideas and perspectives
- ✓ Reduced turnover
- ✓ Increased attendance and productivity
- ✓ Access to wage subsidies and incentives through DES providers

Young Workforce

The youth unemployment rate in Australia has remained steady in recent times at 13.4%. Research from 2014 shows that an Australian who is unemployed in their youth is three times more likely to be unemployed later in life. A survey conducted in 2014 with young Australians (aged 15-19) revealed that their greatest objective is a successful career but that less than 60% believed that this outcome was very achievable in the current climate.

Analysis in 2015 shows that this 15-19 age group also experiences the most difficulty finding sustainable employment. Trends towards self-service checkouts and online shopping are a detrimental influence on entry level roles in the retail sector, the age group's largest employer.

The largest employing occupations for young people do not require tertiary qualifications.



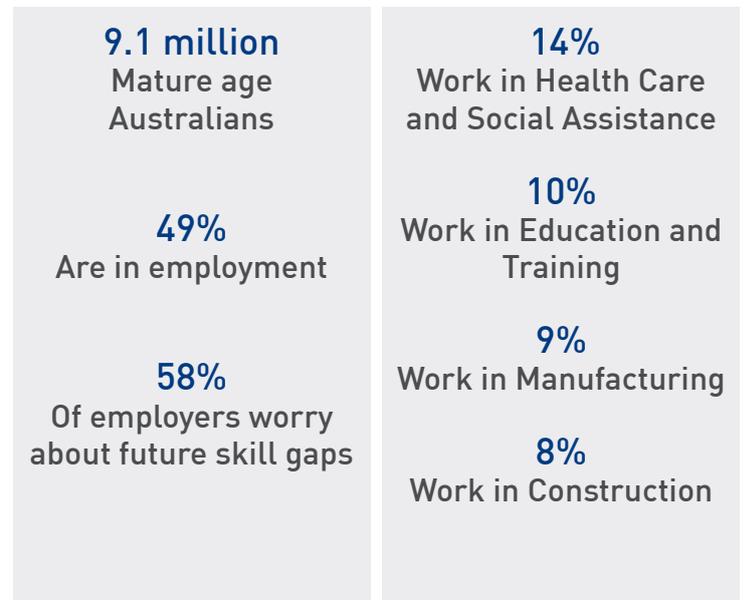
Mature Age Workforce

Approximately 49% of Australia's 9.1 million mature aged population (45 and over) are in employment. This group of 4.5 million represents 38% of the overall workforce.

Workers wishing to delay full-time retirement are completing new formal qualifications in significant numbers to gain new skills and enhance transferable ones.

All sectors have significant mature age representation. Accommodation and Food Services, an industry dominated by young workers, still has a 20% mature age workforce. Transport, Postal and Warehousing has one of the oldest age profiles: 48% of workers in this sector are mature age.

The four industries below employ the majority of mature age workers.



Benefits of Employing Young People

- ✓ Technology savvy
- ✓ Intergenerational training and knowledge transfer
- ✓ Blank slate training and moulding
- ✓ New ideas and enthusiasm
- ✓ Affordability
- ✓ Role and schedule flexibility
- ✓ Access to youth wage subsidy and vocational training incentives

Benefits of Employing Mature Age People

- ✓ Strong work ethic
- ✓ Wisdom and life experience
- ✓ Accumulated professional and personal contacts
- ✓ Customer relatability
- ✓ Role modelling and leadership
- ✓ Access to wage subsidies through the Restart Programme

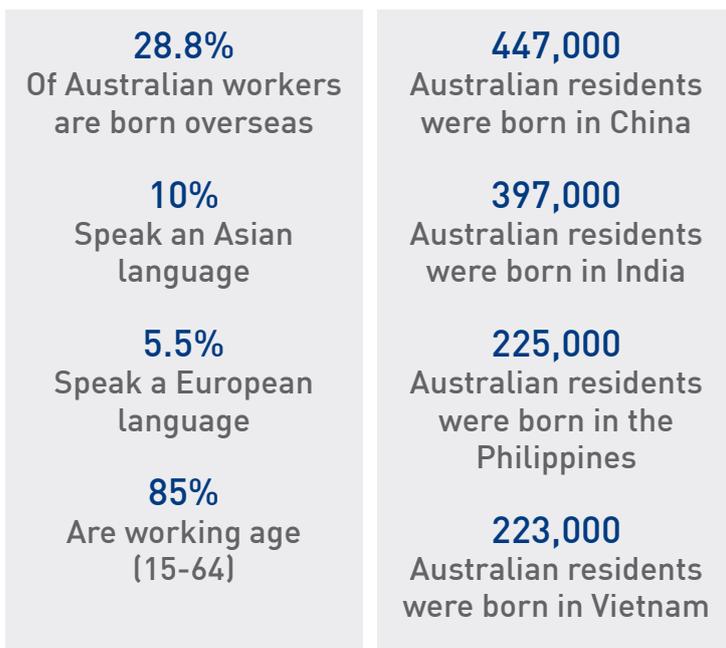
Multicultural Diversity

Australia is one of the world's most multicultural nations. 28.8% of people living in Australia were born overseas and 20% speak another language. On average, a new migrant arrives in Australia every 2 minutes and 12 seconds.

Having a culturally and linguistically diverse (CALD) workplace reflects both the local and national community in which Australian businesses operate.

Businesses with a CALD workforce can encounter intermittent challenges with communication and behavioural norms. Training teams to appreciate these differences can be highly beneficial, not only to maintain a robust working culture but also to foster positive relationships with external clients and stakeholders who are similarly diverse.

Promoting values of harmony and acceptance also aids in breaking down a workforce's general resistance to change, building a culture which is more patient, observant and open to new ideas.



Benefits of Employing Multicultural People

- ✓ Domestic and international client communication
- ✓ Improved workplace morale and satisfaction
- ✓ New ideas and perspectives
- ✓ Eased skill shortages
- ✓ International cultural competency
- ✓ Future capacity building

Indigenous Representation

Across Australia, NSW has the largest Indigenous population, recording 208,000 residents in 2011, followed by Queensland with 189,000 and WA with 88,000.

The age profile for Indigenous people is much younger than that of non-Indigenous people. Across the working-age population bracket, Indigenous people have a higher percentage of people between the ages of 15-25.

The five sectors listed below account for more than half of the Indigenous workforce in Australia. Indigenous employment rates have historically been 26% lower than that of other Australians, due primarily to lower levels of education and health, and living in areas with fewer employment opportunities.

In recent years, the private sector has increased its employment of Indigenous staff using a combination of pre-employment programs, non-standard selection processes, wage subsidies and diversity initiatives with explicit Indigenous recruitment target goals.



Benefits of Employing Indigenous People

- ✓ Recruitment practice leadership
- ✓ Local worker expertise
- ✓ Improved workplace morale and satisfaction
- ✓ New ideas and perspectives
- ✓ Regional cultural competency
- ✓ Access to government wage subsidies and apprenticeship incentives

Worker Sentiment by Industry

The table below reflects employee sentiment around Australia across 18 industry sectors*. Survey respondents were asked at the start of 2015 what their employment intentions were for the next 12 month period. Percentages reflect how confident workers feel in each industry and how positive they feel about their career options, both with their current employer and in the sector more generally.

Employees in Professional, Scientific and Technical Services, and Public Administration and Safety, are the most likely to see themselves working for the same employer in a different role, which shows confidence about role diversity or promotion. More than 10% of Mining sector employees intend to move employer in the next twelve months. Given the climate in this sector at present, this suggests some anxiety about job security and availability.

Intention to move industries is highest for Accommodation and Food Services, Retail Trade, Administrative and Support Services and Arts and Recreation Services, suggesting that employees are less likely to see themselves working in these sectors long term, and incentives to remain are not as strong as other industries.

*Note: Data for Agriculture, Forestry and Fishing was not available.

3/4 of all workers expect to be with the same employer in 12 months, but 1/4 of this group expect a different role.

Worker intention to join a new employer within the same industry reflects strong confidence about job prospects in that sector. Intention to change industry completely shows low confidence.

Workers who report being unsure are looking for reasons or assurance to stay with their current employer.

Industry	Work for same employer in same role	Work for same employer in different role	Work for different employer in same industry	Work in different industry	No longer working	Other	Unsure
Health Care and Social Assistance	57.7%	16.8%	6.4%	6.4%	2.1%	2.7%	7.9%
Retail Trade	54.4%	18.7%	4.3%	9.6%	2.2%	1.4%	9.5%
Construction	62.5%	19.2%	7.2%	6.2%	1.4%	1.4%	5.1%
Professional, Scientific and Technical Services	53.4%	27.4%	6.3%	2.7%	1.3%	2.7%	6.3%
Education and Training	64.0%	14.3%	7.2%	4.4%	1.8%	0.9%	7.4%
Manufacturing	61.4%	15.0%	4.1%	6.7%	3.2%	2.9%	10.9%
Accommodation and Food Services	45.7%	17.1%	5.4%	14.9%	3.1%	2.9%	10.9%
Public Administration and Safety	51.8%	26.6%	7.3%	3.7%	2.3%	1.4%	6.9%
Transport, Postal and Warehousing	59.4%	17.1%	4.3%	6.9%	1.6%	1.9%	8.8%
Other Services	56.3%	15.1%	7.4%	8.1%	1.8%	2.6%	7.8%
Financial and Insurance Services	58.1%	21.2%	4.7%	6.2%	1.2%	0.6%	8.0%
Administrative and Support Services	50.8%	21.1%	3.9%	12.2%	2.3%	0.7%	9.0%
Wholesale Trade	58.1%	18.6%	3.7%	6.5%	3.1%	0.8%	9.2%
Mining	56.1%	22.9%	10.7%	2.8%	1.9%	0.9%	4.7%
Arts and Recreation Services	53.6%	17.9%	7.9%	10.1%	1.7%	0.9%	8.0%
Rental, Hiring and Real Estate Services	59.6%	19.7%	7.9%	10.1%	1.7%	0.9%	8.0%
Information Media and Telecommunications	52.6%	20.9%	6.1%	3.9%	2.2%	2.6%	11.7%
Electricity, Gas, Water and Waste	66.2%	17.6%	2.2%	8.1%	2.2%	0.0%	3.7%
All Industries	56.9%	18.6%	5.7%	7.0%	2.1%	1.6%	8.1%



568,100

Seeking Full Time Work

232,600

Seeking Part Time Work



70%

Want work-life balance



67%

Want a higher salary



64%

Want cultural fit within the company and the team



58%

Want career advancement and training



46%

Want better benefits



36%

Want to join a company whose values match theirs



30%

Want to work for a strong leader



14%

Want to work for a better brand



13%

Want a better job title

Seeking Employment

More than 800,000 people across Australia are currently unemployed and seeking work. 45% of people who are not working find employment within 13 weeks, and almost half of those people (47%) are working after 4 weeks. The longer that a person stays unemployed, the harder it is to get work: numbers of people who have been unemployed for over a year have grown by 40% over the last five years, compared to a general growth in unemployment numbers below 20%.

People seeking employment in Australia have nine key requirements of their next employer (left). These requirements reflect workers' needs to fit in and feel appreciated, as well as having options to progress within the organisation. These elements should be key considerations for any employer wanting to present competitive job opportunities.



44%

Use online job sites

38%

Use company websites



26%

Use personal networks

23%

Use professional networks



23%

Use mobile job search apps

At the same time as working with a recruiter, candidates are exploring their employment options online - evaluating competitive offers and companies, as well as accepting network recommendations. Job seekers are much more confident that they are making the right career choices when they have researched their options themselves. With this in mind, it is important to maintain an online presence that reflects the same company values and benefits that the recruiter is presenting to the candidate.

80% of jobs are not advertised - including many of those managed by recruiters. These vacancies are typically filled by an existing talent pool, word-of-mouth referrals and internal succession. Similarly, recruiters have access to candidates who may not be actively seeking a new job. Recruiters offer attractive employers access to these high quality candidates before they become available on the market.

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THE BEST IN PEOPLE.