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ManpowerGroup Employment Outlook Survey Q4 2020: Polish employers want to increase employment again

- *Modest workforce gains are anticipated in Poland during the coming quarter - while 9% of employers expect to increase payrolls, 4% forecast a decrease.*
- *Payroll growth is forecast for all seven Polish industry sectors, with the strongest Outlooks of +19% in the Construction sector and +15% for the Wholesale & Retail Trade sector. The most cautious forecasts are reported in two sectors with Outlooks of +1% in the Other Production and Other Services sector.*
- *Job gains are expected in all six Polish regions during the October to December period. With an Outlook of +7%, employers in the South-West expect the strongest regional hiring pace. The weakest Outlooks of +3% are reported in two regions – the East and the North-West.*
- *10% of employers expect to return to pre-COVID-19 hiring levels within 12 months.*

Warsaw, Poland, 9 June 2020 – Polish employers report modest hiring intentions for the October to December time frame. While 9% of employers expect to increase payrolls, 4% forecast a decrease, and 83% anticipate no change, resulting in a Net Employment Outlook of +5%. Once the data is adjusted to allow for seasonal variation, the Outlook stands at +5%. Hiring intentions are 12 percentage points stronger in comparison with the previous quarter and declined by 3 percentage points when compared with this time one year ago.

Companies were also asked about how they assess the chances of returning to pre-pandemic employment. 10% of companies believe that this will happen during the next year, while 4% say that it will take more than a year. 82% of the companies forecast that they will never be able to return to the number of employees from before Covid-19.

Increases in the regions

Employers in all of the six regions forecast an increase in payrolls during the fourth quarter of 2020. The strongest Net Employment Outlook of +7% is reported in the South-West, while employers in three regions - in the South, in the North, and the Central - report Outlooks of +6%. In the East and the North-West, employers report more pessimistic hiring prospects with Outlooks of +3%. Hiring prospects weaken in five of the six regions when compared with the previous quarter.

Hiring intentions strengthen in five of the six regions when compared with the previous quarter. The most noteworthy decrease of 19 percentage points is reported in the Central. In two regions – the North and South - employers report considerable decreases of 16 percentage points. An Outlook declines by 3 percentage points in the East.

When compared with this time one year ago, employers in four of all six regions report weaker hiring prospects. A moderate decrease of 8 percentage points is reported in the South-West and Outlooks to decline by 6 percentage points in both Eastern Poland and in the South. In the North and the Central employers report a slight increase by 4 and 2 percentage points respectively.

Construction and trade with the best prospects for job seekers

Employers in all seven Polish industry sectors forecast a decrease in payrolls during the coming quarter, most notably in the Construction sector with an Outlook of +19%. Elsewhere, the Wholesale & Retail Trade sector

employers forecast optimistic hiring activities, reporting an Outlook of +15%, while Outlooks of +6% are reported in two sectors – the Finance & Business Services sector and the Manufacturing sector. The weakest hiring intentions are reported in the Other production and the Other services sector.

Hiring prospects strengthen in all seven industry sectors when compared with the previous quarter. The steep increase of 31 percentage points is reported in the Restaurants & Hotels sector. Construction sector employers report an increase of 24 percentage points and the Wholesale & Retail Trade sector Outlook increases by 21 percentage points.

In a comparison with the fourth quarter of 2019, hiring plans to increase in three of all seven industry sectors, most notably for the Construction and Wholesale & Retail Trade sector (by 6 percentage points). Elsewhere, the Outlook decline by 8 percentage points in the Manufacturing and by 7 percentage points in the Other Services.

Large organizations with the highest employment growth

Employers in three of four organization size categories expect payrolls to increase during the coming quarter. Large employers report respectable hiring plans with an Outlook of +14%, while micro size organizations declare modest hiring activities (+6%). Small and medium-sized companies anticipate limited job gains, reporting an Outlooks of 0 and +1% respectively.

Poland is one of the strongest labor markets in its region

More than 12,500 employers in Europe, the Middle East, and Africa (EMEA) region were surveyed by ManpowerGroup on their hiring plans for the fourth quarter of 2020. Employers in 13 of 24 countries expect to grow payrolls, while payrolls are expected to decline in eight (with flat labor markets forecast in five). EMEA's strongest labor markets are forecast for Turkey (+10%), Greece (8+), and Poland (+5%), while the weakest are expected in South Africa (-13%), the UK (-8%) and Croatia (-6%). Hiring plans strengthen in 24 of the 26 EMEA countries when compared with the previous quarter, but weaken in 25 in a comparison with this time one year ago.

The ManpowerGroup report is available free of charge to the public and can be downloaded from www.manpowergroup.pl. Results for all 43 countries can be viewed in the new interactive Manpower Employment Outlook Survey Explorer tool at <http://manpowergroup.com/meos>.

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About the Survey

The global leader in innovative workforce solutions, ManpowerGroup releases the ManpowerGroup Employment Outlook Survey quarterly to measure employers' intentions to increase or decrease the number of employees in their workforce during the next quarter. It is the world's most extensive, forward-looking employment survey, commencing in 1962. For 4Q 2020, sample sizes are smaller than in previous quarters, reflecting the impact of the global health emergency. The survey is based on interviews with over 34,000 public and private employers across 43 countries and territories to measure anticipated employment trends each quarter. The survey with Poland referring results can be found at www.manpowergroup.pl in the "Labour Market Reports" section.

ABOUT MANPOWERGROUP

ManpowerGroup® (NYSE: MAN), the leading global workforce solutions company, helps organizations transform in a fast-changing world of work by sourcing, assessing, developing and managing the talent that enables them to win. We develop innovative solutions for hundreds of thousands of organizations every year, providing them with skilled talent while finding meaningful, sustainable employment for millions of people across a wide range of industries and skills. Our expert family of brands – Manpower, Experis and Talent Solutions – creates substantial value for candidates and clients across more than 75 countries and territories and has done so for over 70 years. We are recognized consistently for our diversity - as a best place to work for Women, Inclusion, Equality and Disability and in 2020 ManpowerGroup was named one of the World's Most Ethical Companies for the eleventh year - all confirming our position as the brand of choice for in-demand talent.

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