

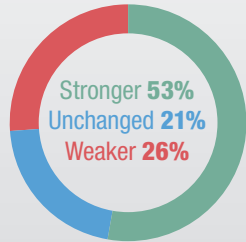
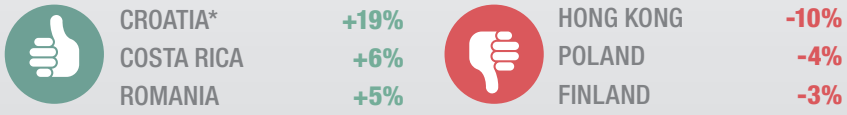
Q2 2020 MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

Where are hiring plans strongest? Where are hiring plans weakest?

HOW ARE EMPLOYER HIRING PLANS CHANGING?

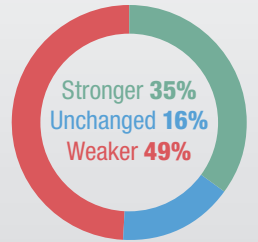
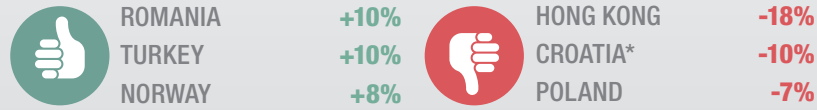
NOTABLE QUARTER-OVER-QUARTER SHIFTS

Compared to 43 countries & territories surveyed for Q1 2020*



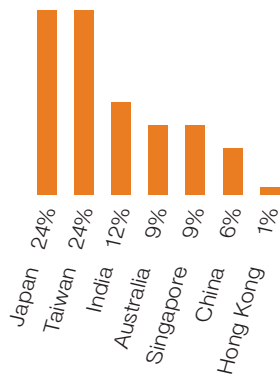
NOTABLE YEAR-OVER-YEAR SHIFTS

Compared to 43 countries & territories surveyed for Q2 2019*



NET EMPLOYMENT OUTLOOKS

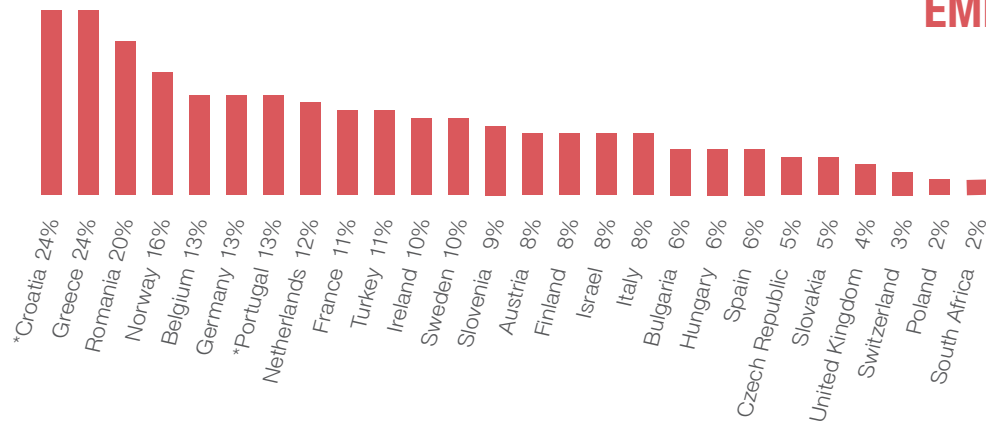
ASIA PACIFIC



- More than 14,000 employers across all 7 countries and territories anticipate payroll gains.
- Compared to Q1 2020, hiring prospects are reported stronger in 2 countries and territories, weaker in 3 and unchanged in 2.
- Japan among the strongest hiring intentions in the region for the 8th consecutive quarter.
- Hong Kong employers report the most cautious outlook.

ManpowerGroup asked over 58,000 employers from 43 countries and territories, "How do you anticipate total employment at your location will change in the next three months to the end of June 2020 as compared to the current quarter?"

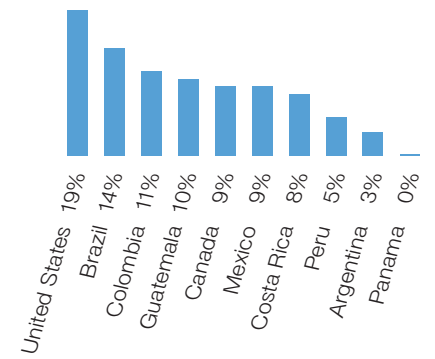
EMEA



- Staffing levels are forecast to grow in all 26 countries.
- Compared to Q1 2020, hiring prospects strengthen in 15 countries, weaken in 7 and remain unchanged in 4.
- Year-over-year, outlooks increase in 9 countries, decline in 12 and remain unchanged in 5.
- The strongest hiring prospects are reported in Croatia and Greece, while the weakest hiring pace is expected in Poland and South Africa.

*Survey results for both Croatia and Portugal are not seasonally adjusted.

AMERICAS



- Employers in 9 out of 10 countries anticipate an increase in staffing levels.
- Compared to Q1 2020, forecasts improve in 6 countries, weaken in 1 and remain unchanged in 3.
- Year-over-year, hiring intentions strengthen in 5 countries, weaken in 4 and remain unchanged in 1.
- Employers in the U.S. and Brazil have the strongest hiring intentions, while the weakest labor market is anticipated in Panama.