

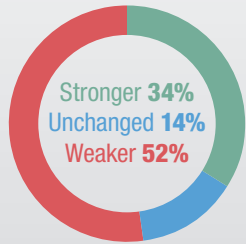
Q4 2019 MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

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

HOW ARE EMPLOYER HIRING PLANS CHANGING?

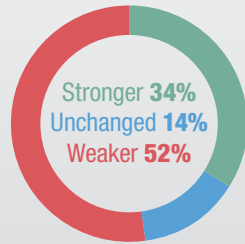
NOTABLE QUARTER-OVER-QUARTER SHIFTS

Compared to 44 countries & territories surveyed for Q3 2019*



NOTABLE YEAR-OVER-YEAR SHIFTS

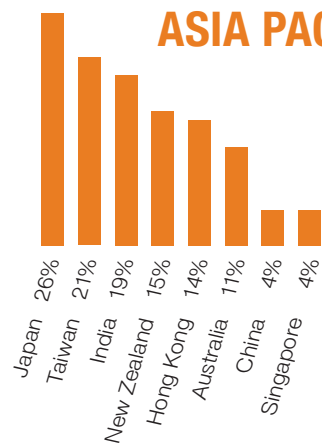
Compared to 44 countries & territories surveyed for Q4 2018*



NET EMPLOYMENT OUTLOOKS

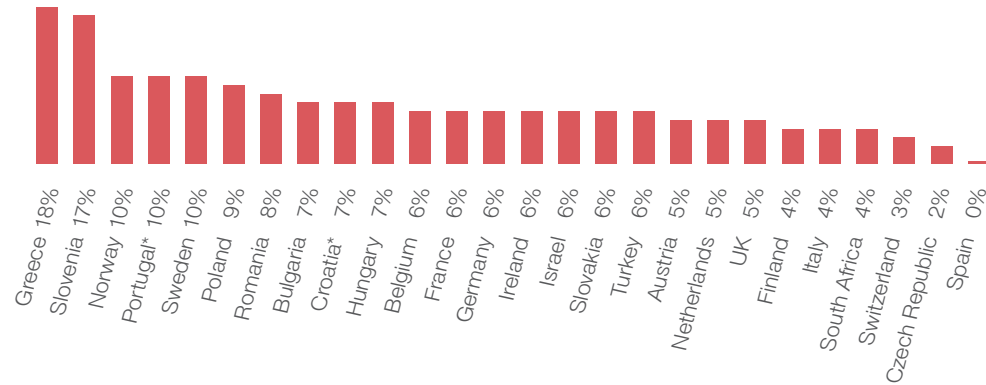
ManpowerGroup asked over 59,000 employers from 44 countries and territories, “How do you anticipate total employment at your location will change in the next three months to the end of December 2019 as compared to the current quarter?”

ASIA PACIFIC



- Employers expect payrolls to grow in all 8 countries and territories, but at varying levels.
- Compared to Q3 2019, stronger hiring prospects are reported in 3 countries/territories, weaker in 4 and unchanged in 1.
- Year-over-year, hiring intentions improve in 2 countries/territories, decline in 4 and remain unchanged in 2.
- Japan anticipates the strongest hiring in the region for the 6th consecutive quarter.
- The weakest outlooks – their lowest in 2 years – are reported in China and Singapore.

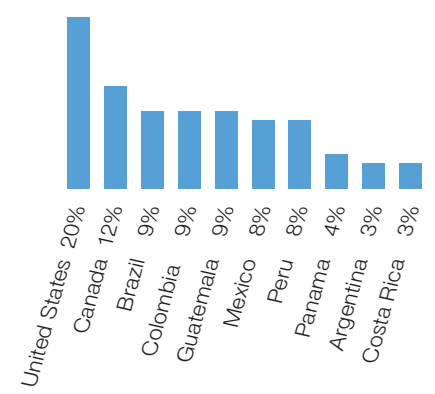
EMEA



- Staffing levels are forecast to grow in 25 out of 26 countries.
- Compared to Q3, hiring plans improve in 10 countries, weaken in 12 and are unchanged in 4.
- Year-over-year, outlooks increase in 8 countries, decline in 14 and remain unchanged in 4.
- The strongest hiring prospects are reported in Greece and Slovenia, while the weakest hiring pace is expected in Spain, the Czech Republic and Switzerland.

*Data for Croatia and Portugal is not seasonally adjusted.

AMERICAS



- Employers in all 10 countries anticipate an increase in staffing levels.
- Compared to Q3, forecasts improve in 2 countries, weaken in 7 and remain unchanged in 1.
- Year-over-year, hiring intentions strengthen in 5 countries and weaken in 5.
- The U.S. reports the region’s strongest hiring plans for the 8th consecutive quarter.
- Argentinian and Costa Rican employers report the weakest hiring prospects.