

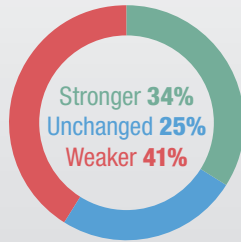
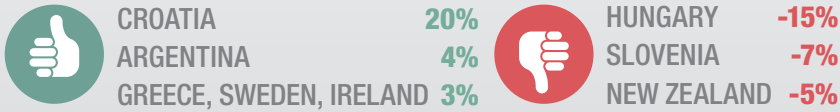
Q2 2019 MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

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

HOW ARE EMPLOYER HIRING PLANS CHANGING?

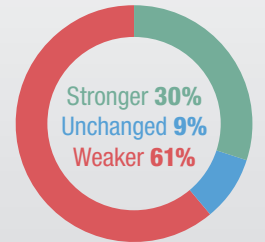
NOTABLE QUARTER-OVER-QUARTER SHIFTS

Compared to 44 countries & territories surveyed for Q1 2019*



NOTABLE YEAR-OVER-YEAR SHIFTS

Compared to 44 countries & territories surveyed for Q2 2018



NET EMPLOYMENT OUTLOOKS

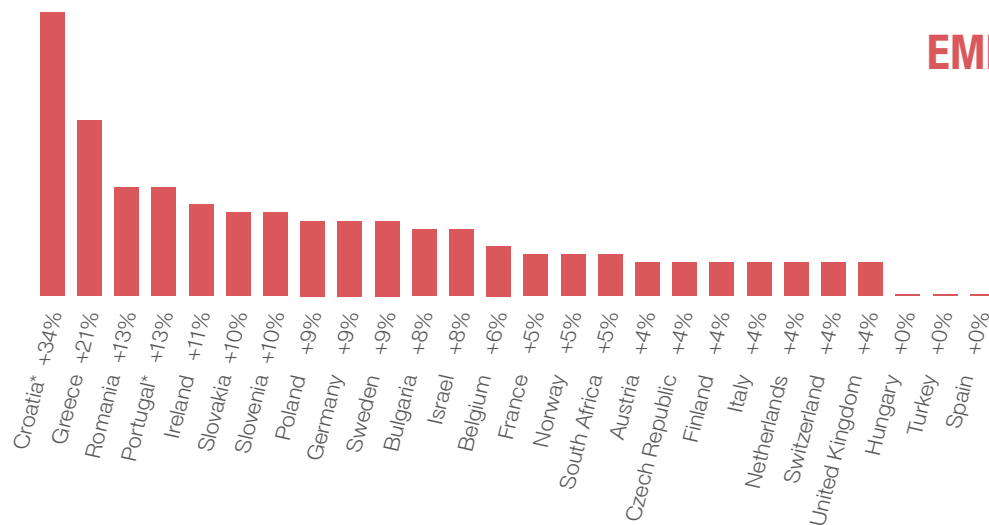
ASIA PACIFIC



- Employers expect payrolls to grow by varying levels in all 8 countries/territories.
- Compared to Q1, hiring prospects are stronger in 2 countries/territories, weaker in 4 and unchanged in 2.
- Year-over-year, hiring intentions improve in 2 countries/territories, decline in 4 and remain unchanged in 2.
- Japan reported the strongest hiring plans for the 4th consecutive quarter.
- Hong Kong reported strongest hiring intention in 7 years.
- Taiwan reported weakest hiring pace in the last 9 years.

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 June 2019 as compared to the current quarter?"

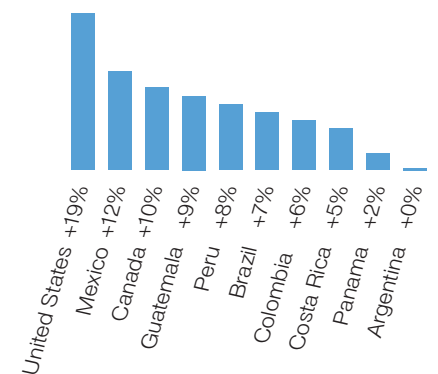
EMEA



- Staffing levels are forecast to grow by varying levels in 23 out of 26 countries.
- Compared to Q1, hiring plans improve in 8 countries and weaken in 8.
- Year-over-year, outlooks improve in 9 countries but decline in 14.
- Employers in Europe's largest economies (Germany, France, UK, Italy) expect to add workers in Q2.

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

AMERICAS



- Staffing levels are forecast to grow by varying levels in 9 countries but show no change only in Argentina.
- Compared to Q1, forecasts improve in 3 countries and decline in 6.
- Year-over-year, hiring plans strengthen in 1 country, weaken in 8 and are unchanged in 1.
- For the 6th consecutive quarter, U.S. employers report the region's strongest hiring plans.