

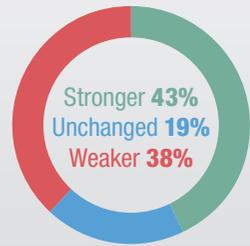
Q3 2019 MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

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

HOW ARE EMPLOYER HIRING PLANS CHANGING?

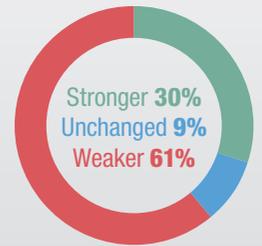
NOTABLE QUARTER-OVER-QUARTER SHIFTS

Compared to 44 countries & territories surveyed for Q2 2019*



NOTABLE YEAR-OVER-YEAR SHIFTS

Compared to 44 countries & territories surveyed for Q3 2018*



NET EMPLOYMENT OUTLOOKS

ASIA PACIFIC

Country/Territory	Outlook
Japan	25%
Taiwan	22%
Hong Kong	16%
Australia	14%
India	13%
New Zealand	12%
Singapore	12%
China	8%

- Employers expect payrolls to grow by double-digit levels in 7 of 8 countries/territories.
- Compared to Q2, hiring prospects strengthen in 5 countries/territories, weaken in 2 and remain unchanged in 1.
- Year-over-year, hiring intentions improve in 2 countries/territories, decline in 5 and remain unchanged in 1.
- For the 5th consecutive quarter, Japan reported the strongest hiring of the region.
- Australia reported its strongest hiring intentions in 7 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 September 2019 as compared to the current quarter?"

EMEA

Country/Territory	Outlook
Croatia*	23%
Greece	20%
Slovenia	20%
Romania	14%
Portugal*	12%
Ireland	9%
Poland	9%
Slovakia	9%
Bulgaria	8%
Israel	7%
Norway	7%
Sweden	7%
Turkey	6%
France	5%
Germany	5%
Netherlands	5%
Finland	4%
UK	4%
South Africa	4%
Austria	3%
Belgium	3%
Czech Republic	3%
Switzerland	2%
Italy	1%
Spain	1%
Hungary	-2%

- Staffing levels are forecast to grow by varying levels in 25 out of 26 countries, with Hungary reporting the only negative hiring intentions for Q3 in the region.
- Compared to Q2, hiring plans improve in 5 countries, weaken in 14 and are unchanged in 7.
- Year-over-year, Outlooks improve in 5 countries, decline in 17 and are unchanged in 4.
- Employers in Europe's largest economies (Germany, France, UK and Italy) expect to add workers in Q3.

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

AMERICAS

Country/Territory	Outlook
United States	21%
Canada	12%
Brazil	11%
Guatemala	11%
Colombia	10%
Mexico	10%
Peru	10%
Costa Rica	4%
Panama	3%
Argentina	1%

- Staffing levels are forecast to grow by varying levels in all 10 countries.
- Compared to Q2, forecasts improve in 8 countries and decline in 2.
- Year-over-year, hiring plans strengthen in 5 countries, weaken in 4 and are unchanged in 1.
- For the 7th consecutive quarter, U.S. employers report the region's strongest hiring plans and the country's strongest intentions in 13 years.
- Brazil reported its strongest hiring plans in 5 years.