ManpowerGroup Employment Outlook Survey

UK

Q1 2019

ManpowerGroup®

United Kingdom Employment Outlook

The ManpowerGroup Employment Outlook Survey for the first quarter 2019 was conducted by interviewing a representative sample of 2,102 employers in the UK.

All survey participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of March 2019 as compared to the current quarter?”

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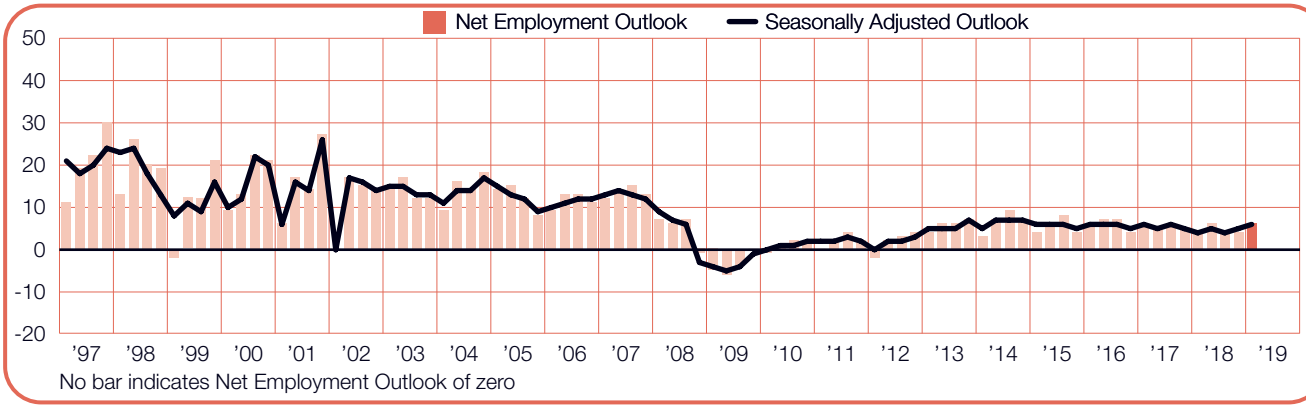
UK Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
Jan-Mar 2019	**8**	**2**	**87**	**3**	**6**	**6**
Oct-Dec 2018	7	3	89	1	4	5
July-Sep 2018	7	3	90	0	4	4
Apr-June 2018	8	2	89	1	6	5
Jan-Mar 2018	7	3	88	2	4	4



UK employers report fair hiring prospects for the January-March period. With 8% of employers anticipating an increase in payrolls, 2% expecting a decrease and 87% forecasting no change, the resulting Net Employment Outlook is +6%.

Once the data is adjusted to allow for seasonal variation, the Outlook also stands at +6%. Hiring prospects remain relatively stable when compared with the previous quarter and improve by two percentage points in comparison with this time one year ago.

Throughout this report, we use the term "Net Employment Outlook." This figure is derived by taking the percentage of employers anticipating total employment to increase and subtracting from this the percentage expecting to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook.

From this point forward, all data discussed in the commentary is seasonally adjusted, unless stated otherwise.

Organisation-Size Comparisons

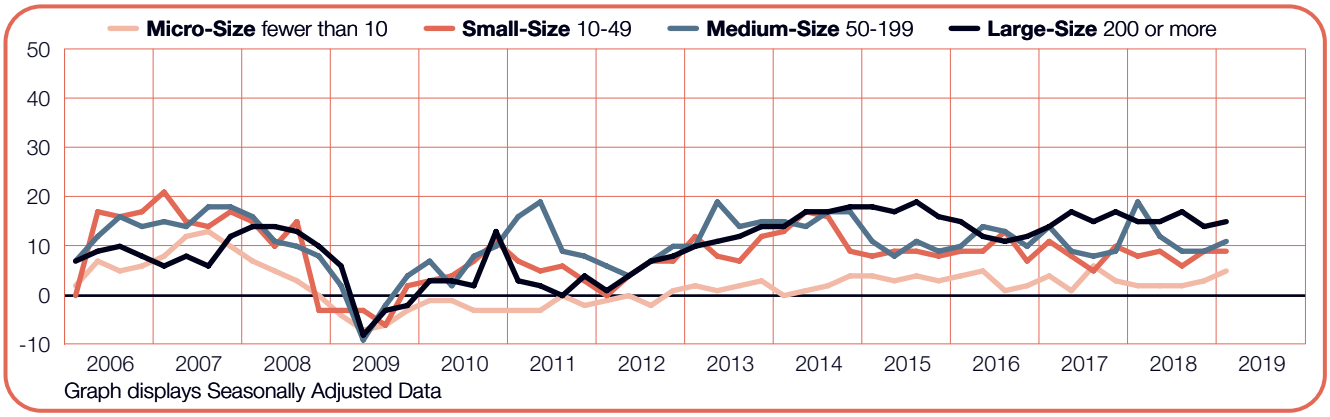
Participating employers are categorised into one of four organisation sizes: Micro businesses have fewer than 10 employees; Small businesses have 10-49 employees; Medium businesses have 50-199 employees; and Large businesses have 200 or more employees.

Payrolls are forecast to grow in all four organisation size categories during the forthcoming quarter, with Large employers reporting the strongest Net Employment Outlook of +15%. Medium employers report respectable hiring plans with an Outlook of +11%, and Outlooks of +9% and +5% are reported by Small- and Micro-size employers, respectively.

In comparison with the previous quarter, hiring prospects are two percentage points and three percentage points stronger for Micro- and Medium-size employers respectively. Meanwhile, Large employers report relatively stable hiring intentions and Small employers report no change.

Medium employers report a moderate decline of four percentage points when compared with this time one year ago. However, the Outlook for Micro employers improves by three percentage points. Elsewhere, the Outlook for Small firms remains relatively stable and Large employers report no change.

Organisation-Size	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
Micro-Size fewer than 10	7	3	88	2	4	5
Small-Size 10-49	9	1	86	4	8	9
Medium-Size 50-199	12	3	79	6	9	11
Large-Size 200 or more	22	8	66	4	14	15



Regional Summary

Workforce gains are forecast in 11 of the 12 UK regions during the first quarter of 2019. The strongest hiring prospects are reported in the East, where the Net Employment Outlook is +12%. East Midlands employers also report hopeful hiring plans with an Outlook of +11%, and cautiously optimistic Outlooks of +10% are reported in both the West Midlands and Wales. Elsewhere, employers in both the South West and Yorkshire & the Humber anticipate moderate hiring activity with Outlooks of +8%. However, South East employers expect to trim payrolls, reporting an Outlook of -2%.

In comparison with the fourth quarter of 2018, hiring plans weaken in six of the 12 regions, most notably by eight percentage points in the South East and by four percentage points in Yorkshire & the Humber. However, Outlooks strengthen in five regions. Employers in Wales report a considerable increase of 18 percentage points, and Outlooks are 10 and eight percentage points stronger for Northern Ireland and the East, respectively.

Employers in eight of the 12 regions report stronger hiring intentions when compared with this time one year ago. In six of these regions, employers report increases of three percentage points – the East, London, the North West, the South West, Northern Ireland and Wales. Meanwhile, hiring intentions weaken in two regions, most notably by six percentage points in the South East.

	Increase Q1 2019	Decrease Q1 2019	Q1 2019	Q4 2018	Q1 2018	Qtr on Qtr Change Q4 2018 to Q1 2019	Yr on Yr Change Q1 2018 to Q1 2019
	%	%	%	%	%	%	%
East	12	2	10 (12)[1]	5 (4)[1]	6 (9)[1]	5 (8)[1]	4 (3)[1]
East Midlands	11	1	10 (11)[1]	13 (11)[1]	9 (10)[1]	-3 (0)[1]	1 (1)[1]
London	7	4	3 (3)[1]	4 (4)[1]	0 (0)[1]	-1 (-1)[1]	3 (3)[1]
North East	6	1	5 (5)[1]	4 (4)[1]	3 (3)[1]	1 (1)[1]	2 (2)[1]
North West	5	2	3 (7)[1]	11 (8)[1]	1 (4)[1]	-8 (-1)[1]	2 (3)[1]
Northern Ireland	6	0	6 (7)[1]	-4 (-3)[1]	2 (4)[1]	10 (10)[1]	4 (3)[1]
Scotland	3	4	-1 (2)[1]	-1 (3)[1]	2 (6)[1]	0 (-1)[1]	-3 (-4)[1]
South East	2	5	-3 (-2)[1]	7 (6)[1]	3 (4)[1]	-10 (-8)[1]	-6 (-6)[1]
South West	10	2	8 (8)[1]	7 (9)[1]	5 (5)[1]	1 (-1)[1]	3 (3)[1]
Wales	12	4	8 (10)[1]	-9 (-8)[1]	5 (7)[1]	17 (18)[1]	3 (3)[1]
West Midlands	10	1	9 (10)[1]	4 (7)[1]	9 (10)[1]	5 (3)[1]	0 (0)[1]
Yorkshire & the Humber	10	1	9 (8)[1]	13 (12)[1]	9 (8)[1]	-4 (-4)[1]	0 (0)[1]

1. Number in parentheses is the Net Employment Outlook when adjusted to remove seasonal variations.

Sector Summary

Employers in eight of the nine industry sectors expect to increase payrolls during the upcoming quarter. Construction sector employers report the strongest hiring plans with a Net Employment Outlook of +9%, while moderate job gains are expected in three sectors with Outlooks of +7% – the Utilities sector, the Community & Social sector and the Hotels & Retail sector. However, Transport & Communications sector employers expect payrolls to decline, reporting an Outlook of -2%.

Hiring plans weaken in five of the nine industry sectors when compared with the previous quarter. Agriculture employers report the most notable decrease of eight percentage points, while the Outlook for the Manufacturing sector declines by six percentage points. Meanwhile, hiring intentions strengthen in three sectors, including two with increases of two percentage points – the Construction sector and the Community & Social sector.

Outlooks also decline in five of the nine industry sectors when compared with this time one year ago. Transport & Communications sector employers report a considerable decrease of 15 percentage points, while the Manufacturing sector Outlook is six percentage points weaker. Elsewhere, hiring prospects improve in three sectors, most notably by four percentage points in the Community & Social sector.

	Increase Q1 2019	Decrease Q1 2019	Q1 2019	Q4 2018	Q1 2018	Qtr on Qtr Change Q4 2018 to Q1 2019	Yr on Yr Change Q1 2018 to Q1 2019
	%	%	%	%	%	%	%
Agriculture	9	6	3 (6)[1]	11 (14)[1]	4 (7)[1]	-8 (-8)[1]	-1 (-1)[1]
Community & Social	10	2	8 (7)[1]	3 (5)[1]	4 (3)[1]	5 (2)[1]	4 (4)[1]
Construction	8	0	8 (9)[1]	6 (7)[1]	5 (6)[1]	2 (2)[1]	3 (3)[1]
Finance & Business Services	5	1	4 (5)[1]	6 (5)[1]	5 (6)[1]	-2 (0)[1]	-1 (-1)[1]
Hotels & Retail	10	4	6 (7)[1]	4 (6)[1]	2 (4)[1]	2 (1)[1]	4 (3)[1]
Manufacturing	4	3	1 (2)[1]	7 (8)[1]	7 (8)[1]	-6 (-6)[1]	-6 (-6)[1]
Mining	3	1	2 (2)[1]	2 (3)[1]	1 (2)[1]	0 (-1)[1]	1 (0)[1]
Transport & Communications	2	5	-3 (-2)[1]	-4 (-1)[1]	12 (13)[1]	1 (-1)[1]	-15 (-15)[1]
Utilities	8	1	7 (7)[1]	12 (12)[1]	8 (8)[1]	-5 (-5)[1]	-1 (-1)[1]

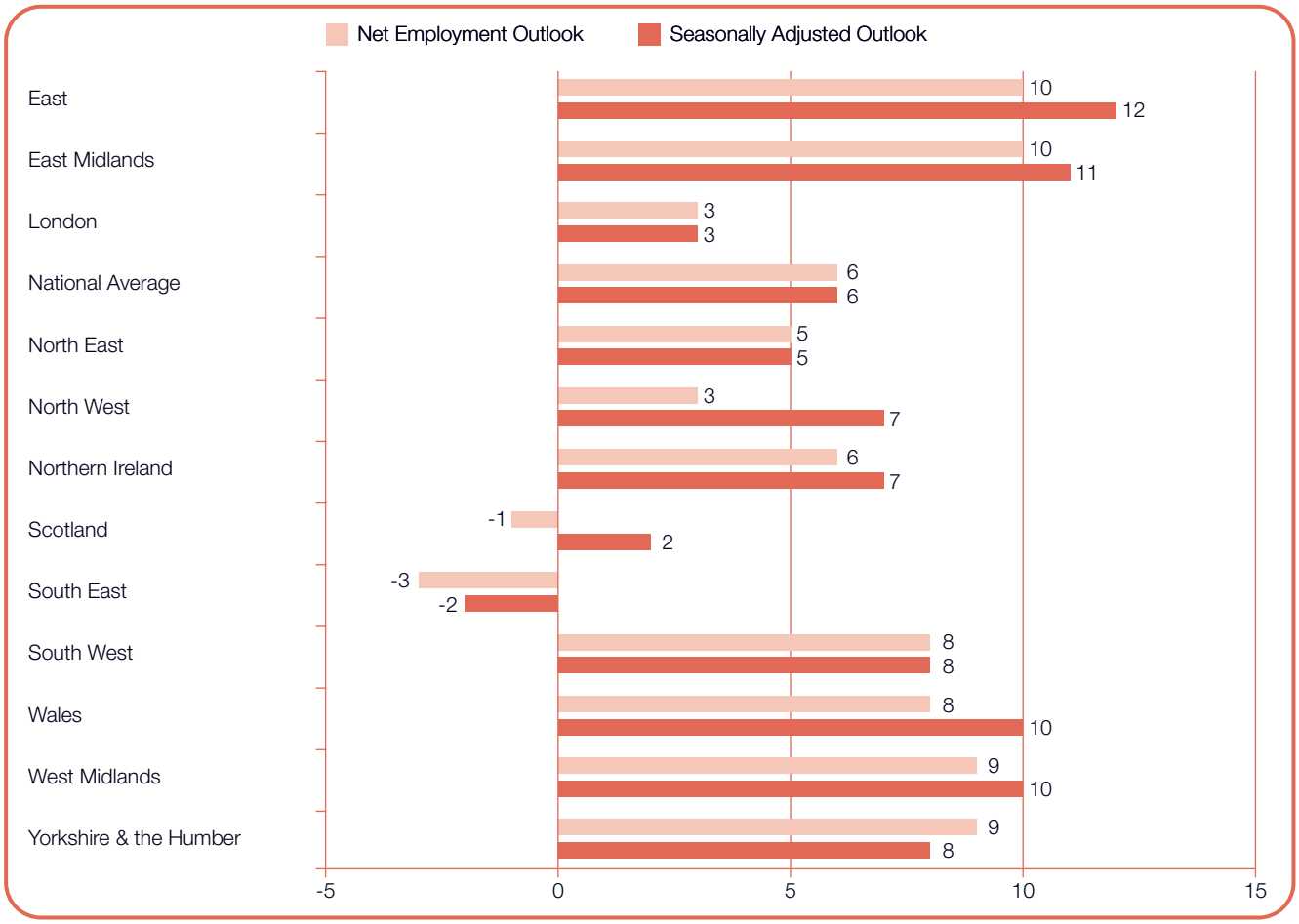
1. Number in parentheses is the Net Employment Outlook when adjusted to remove seasonal variations.

Regional Comparisons

Employers in 11 of the 12 regions forecast an increase in payrolls by the end of the first quarter of 2019. The strongest labour markets are anticipated in the East with a Net Employment Outlook of +12%, and in the East Midlands where employers report a respectable Outlook of +11%. In both the West Midlands and Wales, employers anticipate moderate hiring activity with Outlooks of +10%, and some hiring opportunities are also expected in the South West and Yorkshire & the Humber where Outlooks stand at +8%. Fair hiring prospects are also reflected in two regions with Outlooks of +7% – the North West and Northern Ireland. However, employers in the South East anticipate an uncertain hiring climate, reporting an Outlook of -2%.

Hiring intentions weaken in six of the 12 regions when compared with the previous quarter. South East employers report a noteworthy decline of eight percentage points, while the Outlook for Yorkshire & the Humber is four percentage points weaker. Meanwhile, Outlooks strengthen in five regions, most notably by a considerable margin of 18 percentage points in Wales. Northern Ireland employers report an improvement of 10 percentage points, and Outlooks increase by eight and three percentage points in the East and the West Midlands, respectively.

When compared with this time one year ago, hiring plans strengthen in eight of the 12 regions. Employers report slight increases of three percentage points in the East, London, the North West, the South West, Northern Ireland and Wales. However, Outlooks decline by six percentage points in the South East and by four percentage points in Scotland.



+10 (+12)%

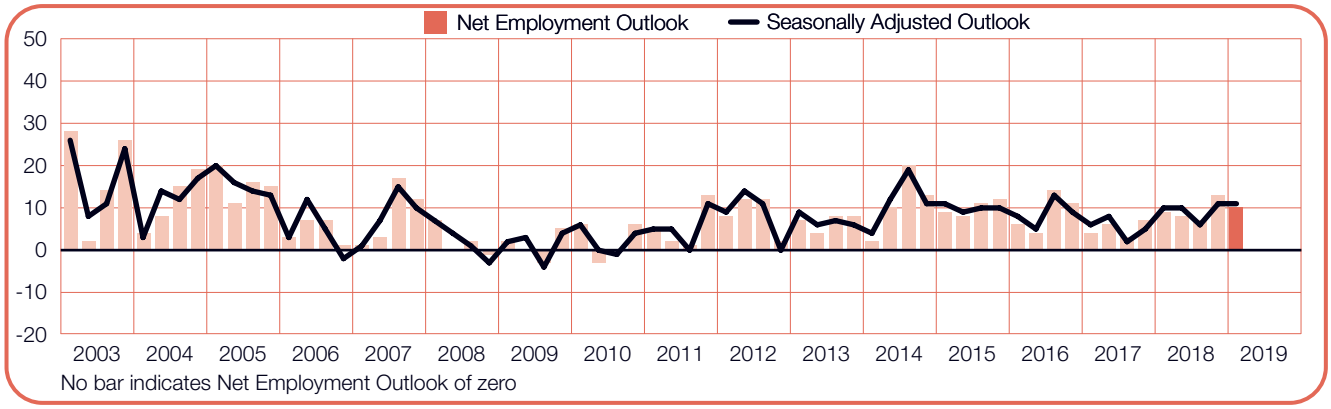
East

The strongest labour market in two years is forecast for the upcoming quarter. Employers report a Net Employment Outlook of +12%, improving by eight and three percentage points quarter-over-quarter and year-over-year, respectively.

+10 (+11)%

East Midlands

The steady hiring pace is expected to continue in the January to March time frame, with employers reporting a Net Employment Outlook of +11% for the second consecutive quarter. Hiring prospects remain relatively stable when compared with this time one year ago.



+3 (+3)%

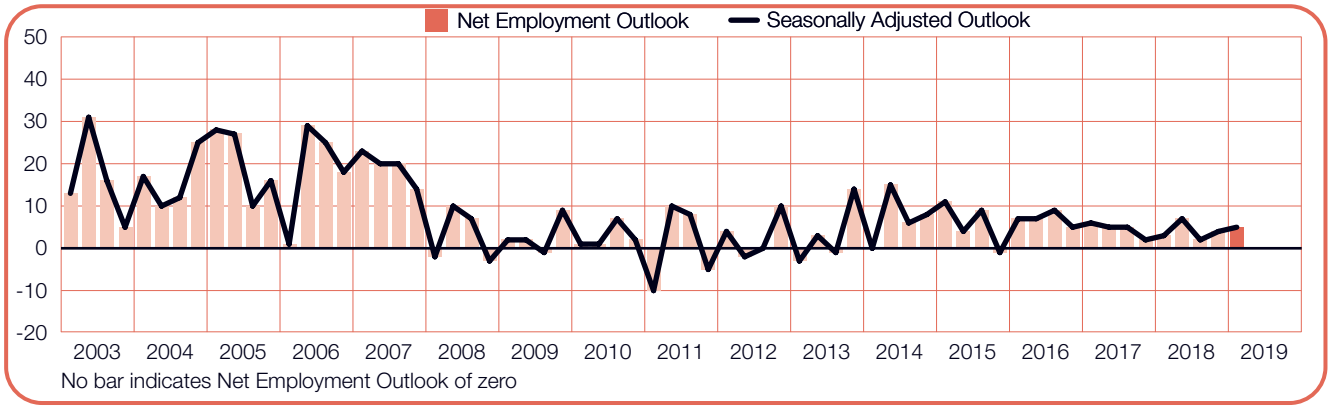
London

Limited payroll gains are anticipated in the first quarter of 2019, with employers reporting a Net Employment Outlook of +3%. Hiring intentions remain relatively stable when compared with the previous quarter and are three percentage points stronger in comparison with Quarter 1 2018.

+5 (+5)%

North East

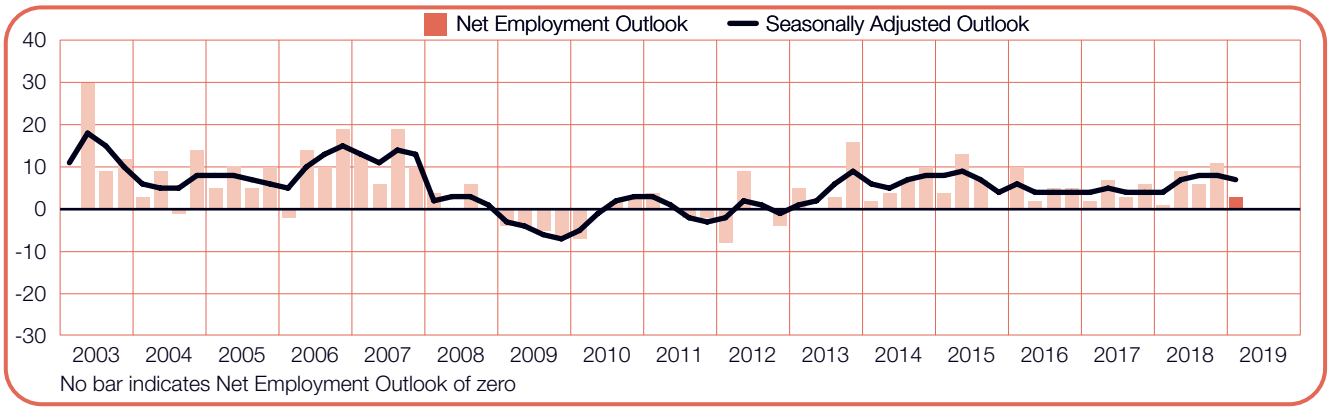
Reporting a Net Employment Outlook of +5%, employers anticipate modest hiring activity in the next three months. Hiring plans remain relatively stable in comparison with Quarter 4 2018 and improve by two percentage points when compared with this time one year ago.



+3 (+7)%

North West

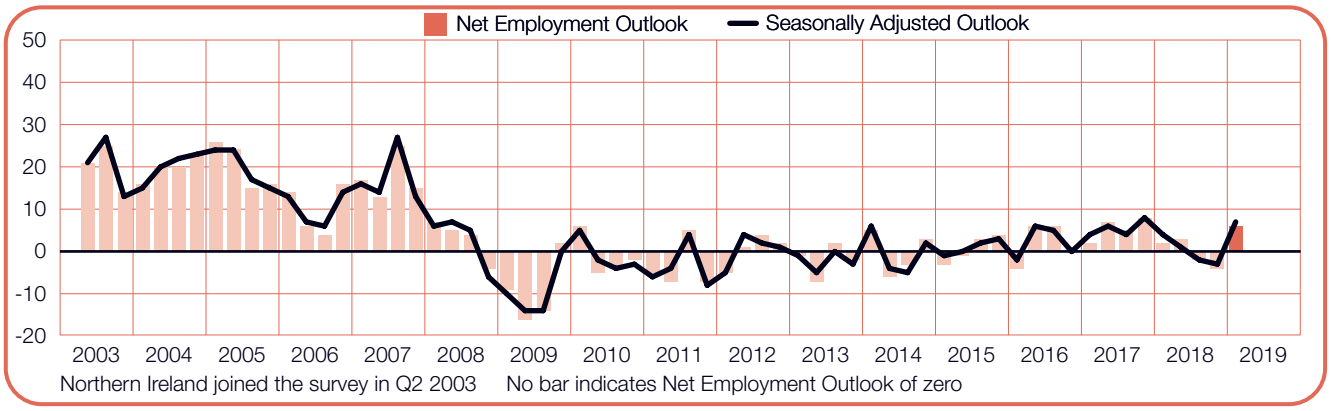
Job seekers can expect the conservative hiring pace to continue in the forthcoming quarter, according to employers who report a Net Employment Outlook of +7%. The Outlook remains relatively stable when compared with the previous quarter and is three percentage points stronger in comparison with the first quarter of 2018.



+6 (+7)%

Northern Ireland

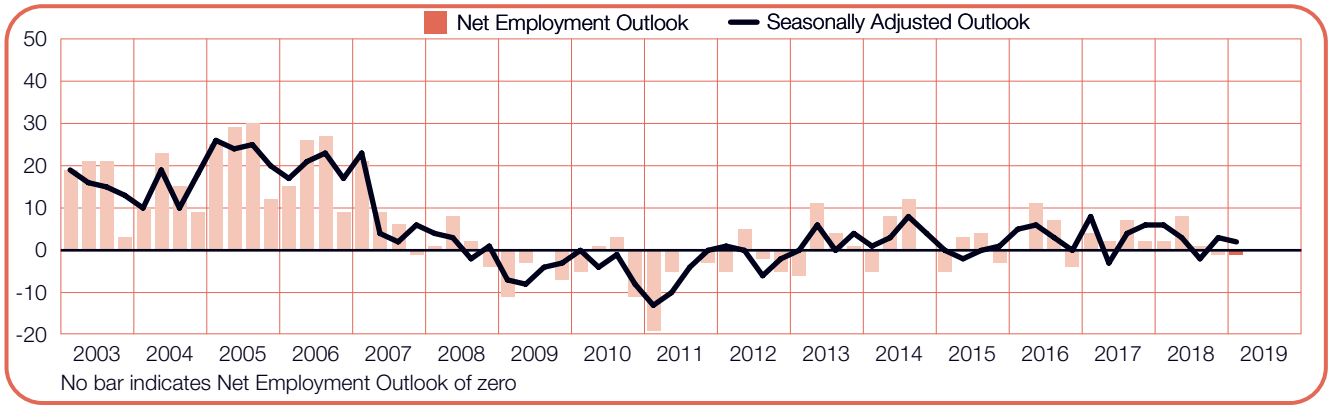
Job seekers can expect a moderate hiring pace in the coming quarter, according to employers who report a Net Employment Outlook of +7%. Hiring intentions improve by a considerable margin of 10 percentage points quarter-over-quarter and are three percentage points stronger when compared with this time one year ago.



-1 (+2)%

Scotland

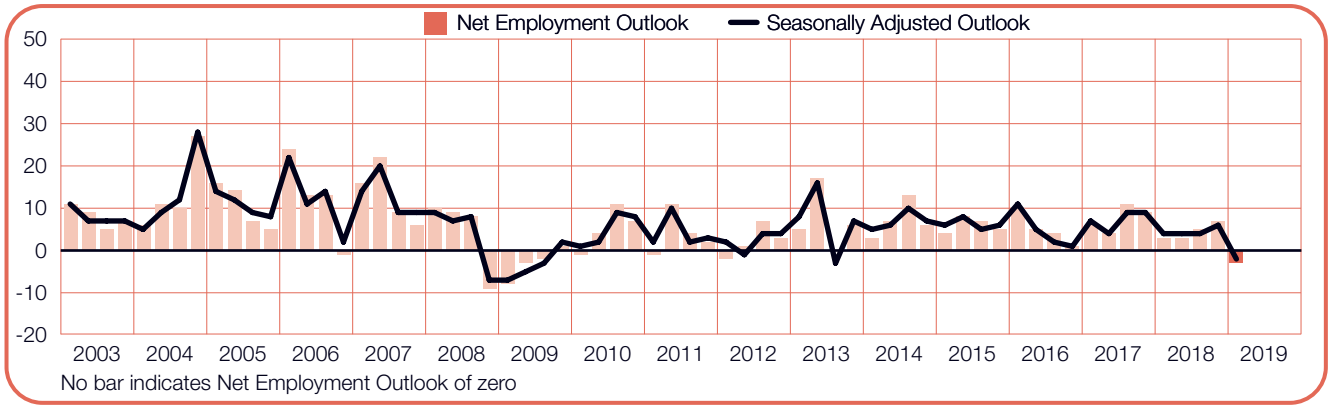
Employers anticipate limited hiring opportunities in the next three months, reporting a Net Employment Outlook of +2%. Hiring plans remain relatively stable when compared with the previous quarter, but are four percentage points weaker in comparison with Quarter 1 2018.



-3 (-2)%

South East

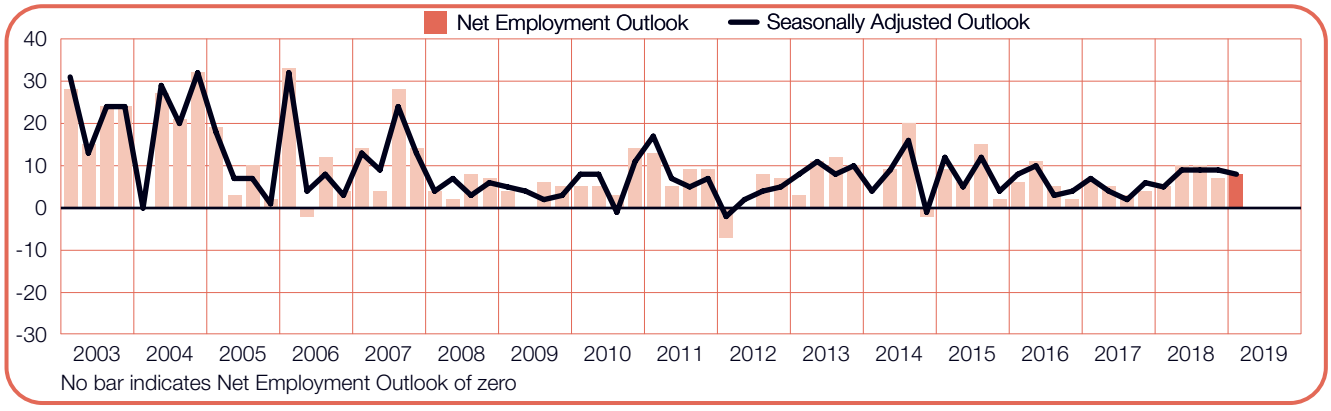
The weakest – and first negative – labour market in more than five years is forecast for the January to March period. Employers report a muted Net Employment Outlook of -2%, declining by eight and six percentage points quarter-over-quarter and year-over-year, respectively.



+8 (+8)%

South West

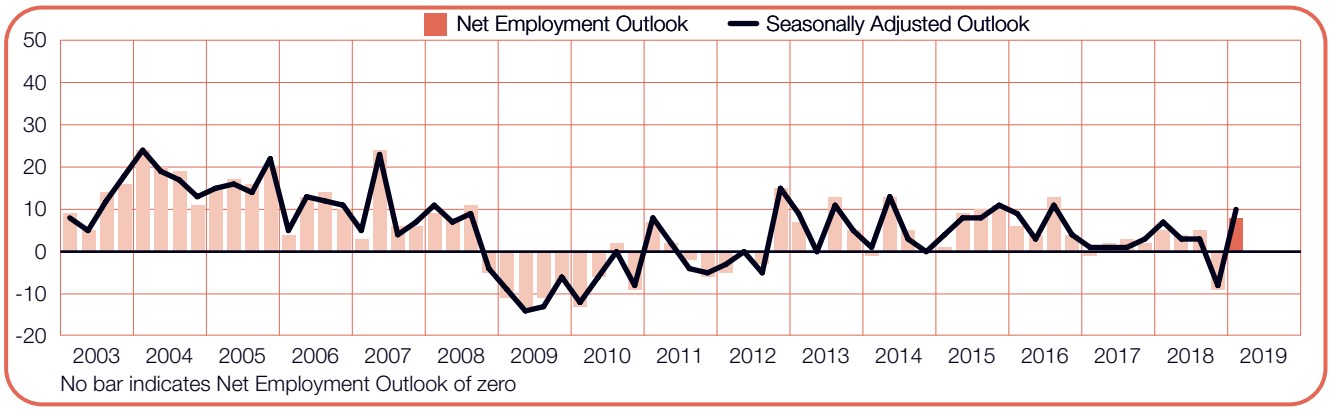
Employers forecast a slight increase in payrolls by the end of the first quarter of 2019, reporting a Net Employment Outlook of +8%. Hiring plans remain relatively stable when compared with the previous quarter and improve by three percentage points in comparison with Quarter 1 2018.



+8 (+10)%

Wales

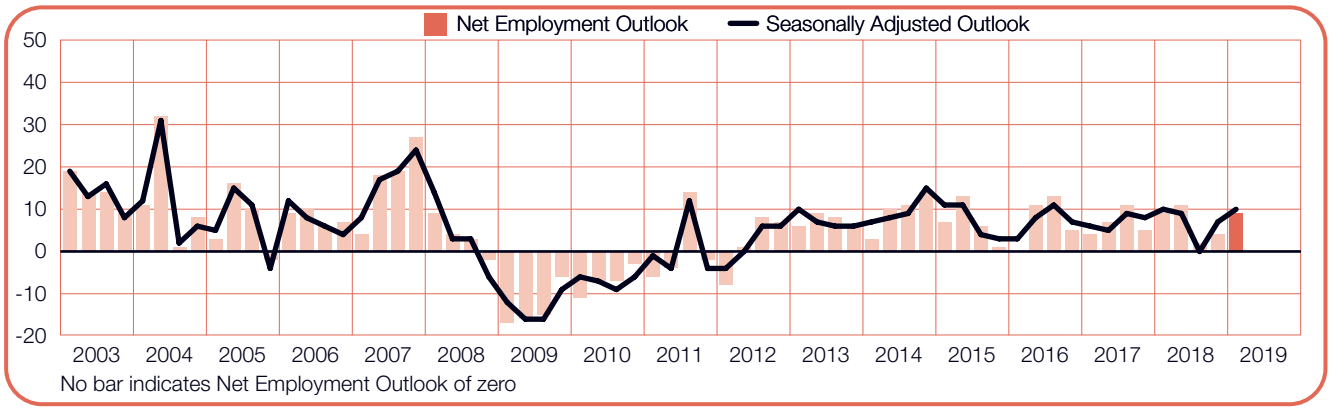
The strongest labour market in more than two years is forecast for the January to March time frame, with employers reporting a Net Employment Outlook of +10%. Hiring prospects improve by a considerable margin of 18 percentage points quarter-over-quarter, and are three percentage points stronger in a comparison with this time one year ago.



+9 (+10)%

West Midlands

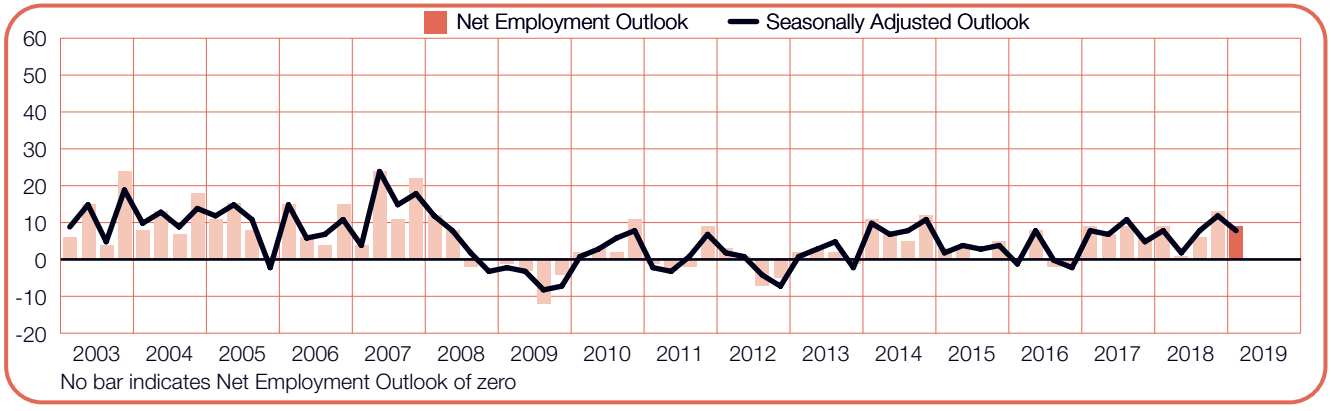
With a Net Employment Outlook of +10%, employers report cautiously optimistic hiring intentions for the next three months. The Outlook is three percentage points stronger in comparison with the final quarter of 2018 and is unchanged when compared with this time one year ago.



+9 (+8)%

Yorkshire & the Humber

A fair hiring climate is forecast for the first quarter of 2019. Employers report a Net Employment Outlook of +8%, declining by four percentage points when compared with the previous quarter, but remaining unchanged in comparison with the first quarter of 2018.

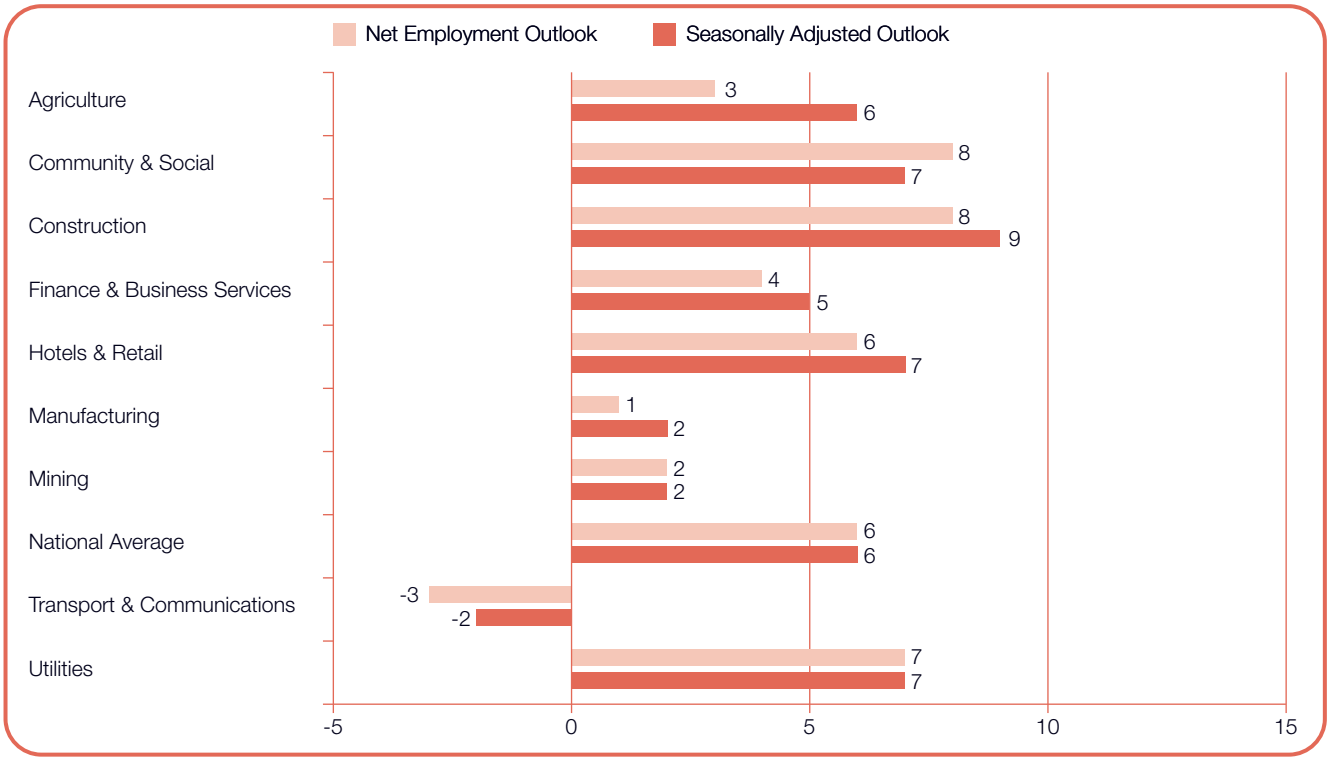


Sector Comparisons

Payrolls are forecast to grow in eight of the nine industry sectors during the first quarter of 2019. The strongest labour market is anticipated by Construction sector employers who report a Net Employment Outlook of +9%. Elsewhere, employers in three sectors report fair hiring prospects with Outlooks of +7% – the Utilities sector, the Community & Social sector and the Hotels & Retail sector. Modest workforce gains are also anticipated by employers in the Agriculture sector and the Finance & Business Services sector, with Outlooks standing at +6% and +5%, respectively. However, Transport & Communications sector employers expect to trim payrolls, reporting an Outlook of -2%.

In comparison with the fourth quarter of 2018, Outlooks weaken in five of the nine industry sectors. Agriculture sector employers report a decrease of eight percentage points, while declines of six and five percentage points are reported for the Manufacturing sector and the Utilities sector, respectively. Elsewhere, hiring plans improve in three sectors, including the Construction sector and the Community & Social sector where employers report increases of two percentage points.

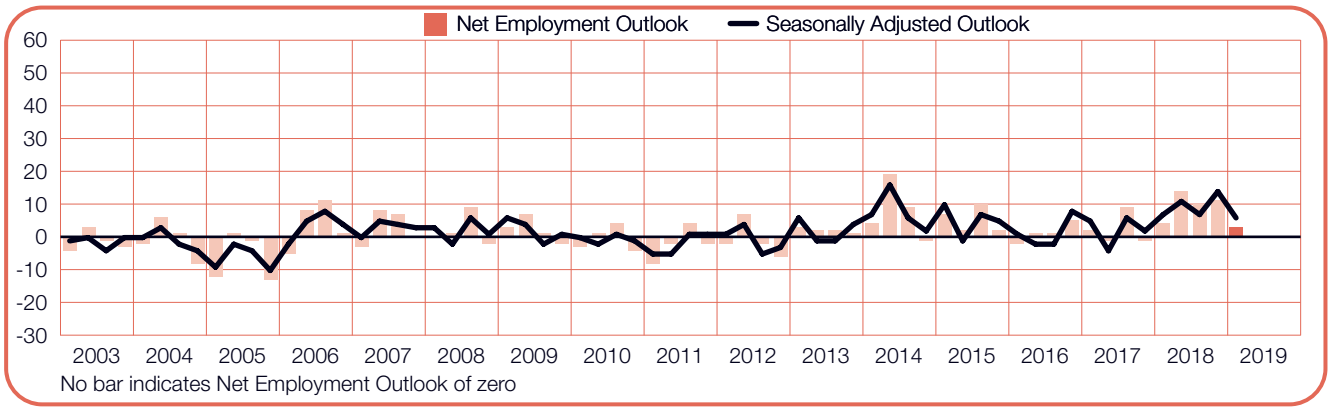
Hiring intentions also weaken in five of the nine industry sectors in comparison with Quarter 1 2018. A considerable decline of 15 percentage points is reported in the Transport & Communications sector, and the Manufacturing sector Outlook decreases by six percentage points. Meanwhile, hiring plans strengthen in three sectors, with an improvement of four percentage points for the Community & Social sector and increases of three percentage points in both the Construction sector and the Hotels & Retail sector.



+3 (+6)%

Agriculture

Job seekers can expect a moderate hiring pace in the first quarter of 2019, according to employers who report a Net Employment Outlook of +6%. Hiring prospects decline by eight percentage points when compared with the previous quarter, but remain relatively stable year-over-year.



+8 (+7)%

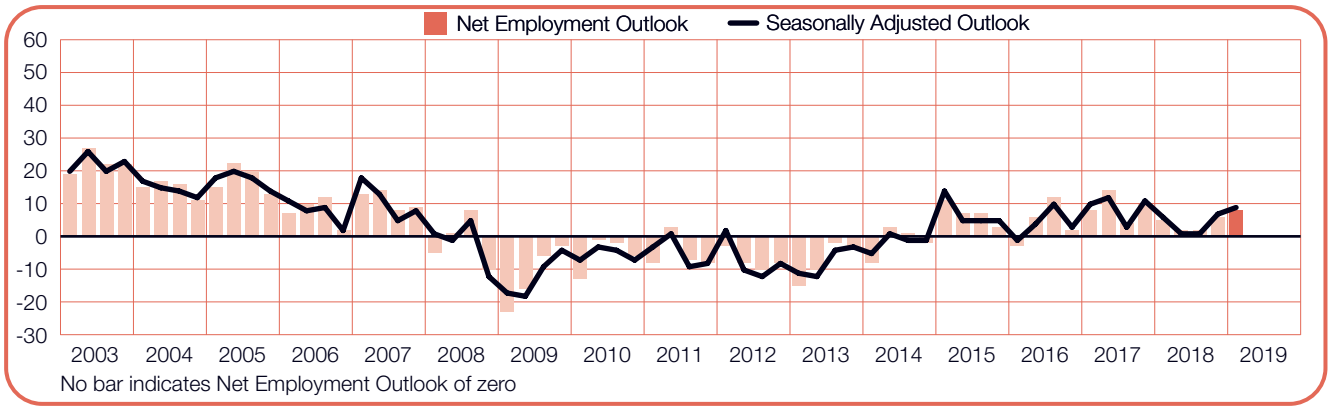
Community & Social

Employers anticipate the strongest hiring pace in more than two years during the first quarter of 2019, reporting a Net Employment Outlook of +7%. Hiring intentions are two percentage points stronger quarter-over-quarter and improve by four percentage points when compared with this time one year ago.

+8 (+9)%

Construction

With a Net Employment Outlook of +9%, employers report cautiously optimistic hiring plans for the upcoming quarter. Hiring intentions are two percentage points stronger quarter-over-quarter and improve by three percentage points when compared with this time one year ago.



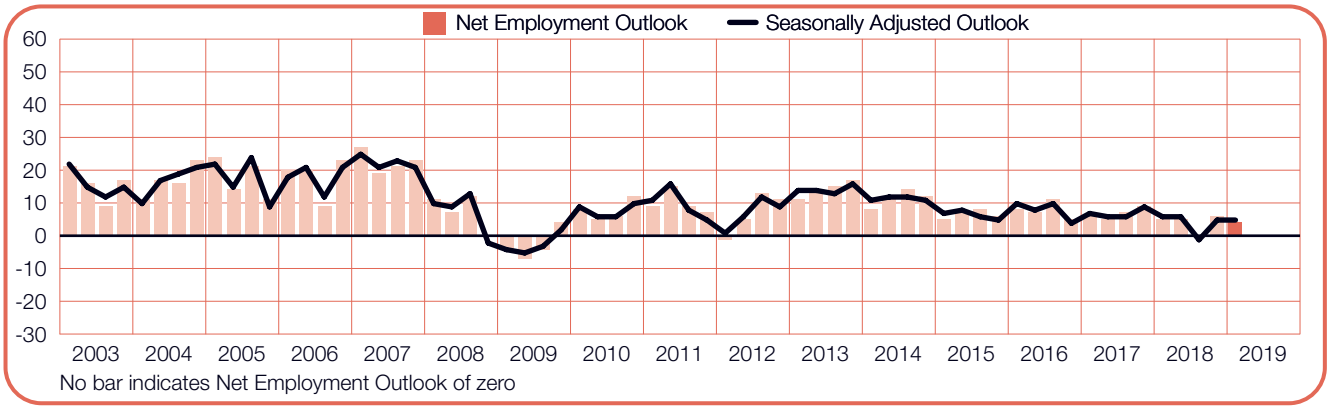
+4 (+5)%

Finance & Business Services

The conservative hiring pace is forecast to continue in the January to March period, with employers reporting a Net Employment Outlook of +5% for the second consecutive quarter. In comparison with this time one year ago, hiring prospects remain relatively stable.

Finance sub-sector employers expect the fair hiring climate to continue in the upcoming quarter, reporting a Net Employment Outlook of +8% for the second consecutive quarter. When compared with this time one year ago, the Outlook remains relatively stable.

Job seekers in the Business Services sub-sector can expect some hiring opportunities in the next three months, according to employers who report a Net Employment Outlook of +5%. Hiring plans are unchanged quarter-over-quarter, and remain relatively stable in comparison with the first quarter of 2018.



No bar indicates Net Employment Outlook of zero

+6 (+7)%

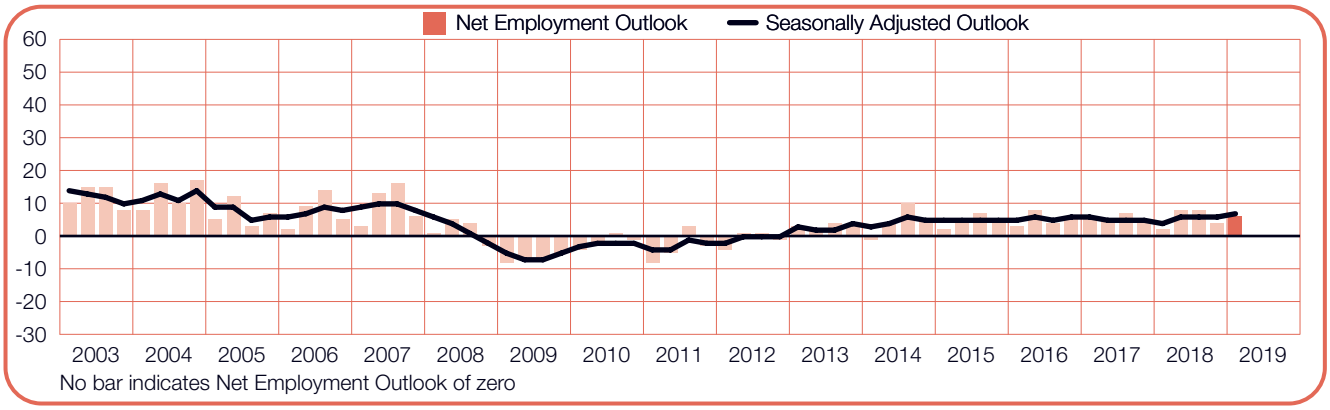
Hotels & Retail

The strongest labour market in 11 years is expected in the next three months. Employers report a Net Employment Outlook of +7%, remaining relatively stable quarter-over-quarter and improving by three percentage points when compared with this time one year ago.

With a Net Employment Outlook of 0, employers in the B2B sub-sector anticipate flat hiring activity during the coming quarter. Hiring prospects decline by two percentage points both quarter-over-quarter and year-over-year.

Job seekers in the B2C sub-sector during the first quarter of 2019 can expect the strongest hiring pace since the sub-sector analysis was first carried out in 2005. The Net Employment Outlook stands at +12%, improving by nine percentage points quarter-over-quarter, and by eight percentage points in comparison with the first quarter of 2018.

Hotels & Restaurants sub-sector employers anticipate steady job gains in the January to March time frame, reporting a Net Employment Outlook of +15%. Hiring intentions are four percentage points stronger when compared with the previous quarter, and improve by seven percentage points in comparison with this time one year ago.



No bar indicates Net Employment Outlook of zero

+1 (+2)%

Manufacturing

The weakest labour market in more than four years is expected in the coming quarter. Employers report a Net Employment Outlook of +2%, declining by six percentage points both quarter-over-quarter and year-over-year.

+2 (+2)%

Mining

Job seekers can expect limited hiring activity in the next three months, according to employers who report a Net Employment Outlook of +2%. Hiring prospects remain relatively stable when compared with the previous quarter, and are unchanged in comparison with the first quarter of 2018.

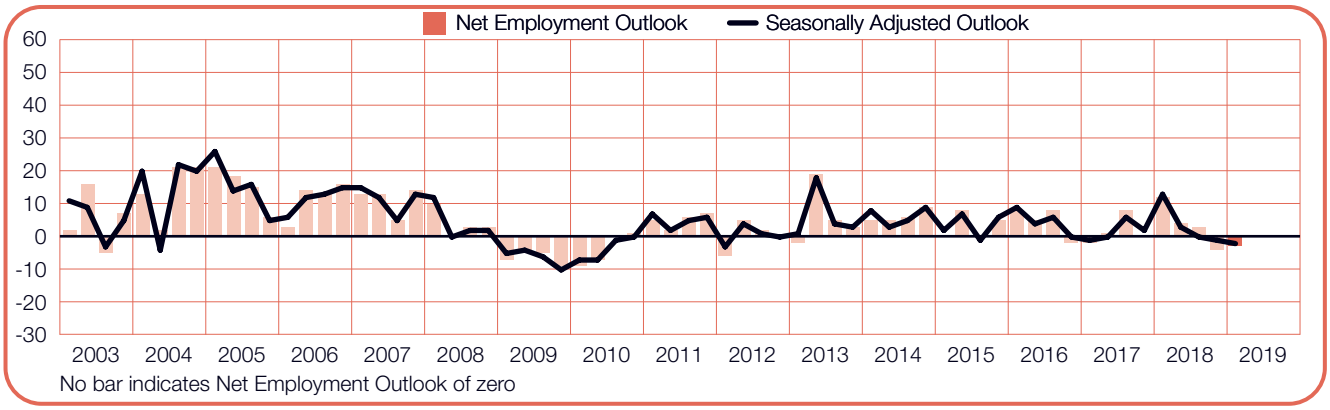
-3 (-2)%

Transport & Communications

Reporting a disappointing Net Employment Outlook of -2% for the coming quarter, employers forecast the weakest hiring climate in seven years. Hiring plans remain relatively stable when compared with the previous quarter, but decline by a considerable margin of 15 percentage points in comparison with Quarter 1 2018.

In the Transport sub-sector, employers expect the muted hiring pace to continue during the first quarter of 2019, reporting a Net Employment Outlook of -3% for the second consecutive quarter. Hiring prospects decline by 15 percentage points when compared with this time one year ago.

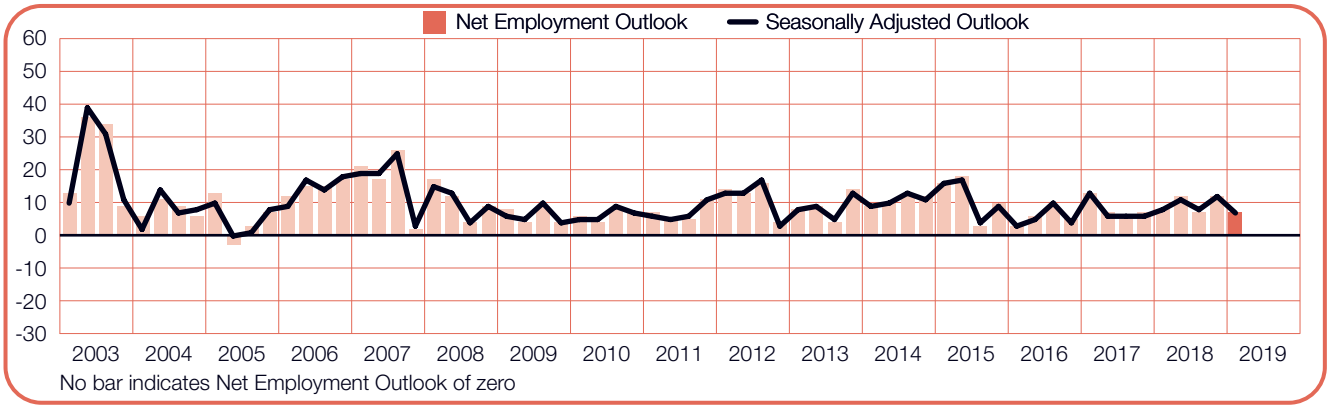
The weakest labour market in more than two years is anticipated in the Telecomms sub-sector, with employers reporting a Net Employment Outlook of -5% for the next three months. Hiring prospects decline by six and 11 percentage points quarter-over-quarter and year-over-year, respectively.



+7 (+7)%

Utilities

Employers expect some hiring opportunities in the next three months, reporting a Net Employment Outlook of +7%. Hiring plans are five percentage points weaker when compared with the previous quarter, but remain relatively stable in comparison with Quarter 1 2018.



Global Employment Outlook

ManpowerGroup interviewed over 60,000 employers across 44 countries and territories to forecast labour market activity* in January-March 2019. All participants were asked, "How do you anticipate total employment at your location to change in the three months to the end of March 2019 as compared to the current quarter?"

The ManpowerGroup research for the first quarter of 2019 reveals that payroll gains are expected in 43 of 44 countries and territories in the period up to the end of March.

Hiring intentions for the coming quarter are stronger in 16 of 44 countries and territories when compared with the prior quarter, weaken in 23 and are unchanged in five. In a comparison with this time one year ago, Outlooks improve in 21 countries and territories, decline in 20, and are unchanged in two**. First-quarter hiring confidence is strongest in Japan, Taiwan, the U.S., Slovenia, Greece and Hong Kong, while employers report the weakest hiring intentions in Argentina, Switzerland, Italy, Panama and Spain.

Job gains are expected for all 26 Europe, Middle East & Africa (EMEA) region countries in the survey during the first quarter of 2019. In comparison to last quarter, employers in eight countries report stronger hiring prospects, but hiring plans weaken in 15. When compared with the same period last year, forecasts strengthen in 12 countries but decline in 13. The strongest EMEA labour markets in the coming quarter are anticipated in Slovenia and Greece, while employers in Switzerland report the weakest hiring plans.

Employers in all eight Asia Pacific countries and territories expect to add to payrolls during the next three months. When compared with the previous quarter, forecasts strengthen in four countries and territories but weaken in two. In comparison with last year at this time, employers in five countries and territories report stronger hiring prospects, while weaker Outlooks are reported in two. Employers in Japan and Taiwan report the strongest hiring intentions across the region, and the weakest Outlooks are reported in China and Singapore.

Payrolls are forecast to increase across nine of the 10 Americas countries included in the survey during the January-March period, although employers in one – Argentina – expect their workforce to decrease in size. Hiring prospects strengthen in four Americas countries when compared with the final quarter of 2018, but weaken in six. In a comparison with the same period last year, Outlooks improve in four countries but decline in five. The most optimistic first quarter hiring plans are reported in the U.S. and Mexico, while employers in Argentina and Panama report the weakest country forecasts in the region.

Full survey results for each of the 44 countries and territories included in this quarter's survey, plus regional and global comparisons, can be found at

www.manpowergroup.com/meos

The next ManpowerGroup Employment Outlook Survey will be released on 12 March 2019 and will detail expected labour market activity for the second quarter of 2019.

* Commentary is based on seasonally adjusted data where available. Data is not seasonally adjusted for Croatia or Portugal.

** Only 43 countries and territories eligible for year-over-year comparison; Croatia has no year-over-year data at this point.

	Quarter 1 2019	Qtr on Qtr Change Q4 2018 to Q1 2019	Yr on Yr Change Q1 2018 to Q1 2019
	%		
Americas			
Argentina	-3 (-4)[1]	-4 (-6)[1]	-12 (-12)[1]
Brazil	7 (8)[1]	2 (1)[1]	2 (2)[1]
Canada	8 (12)[1]	-2 (-2)[1]	0 (0)[1]
Colombia	7 (10)[1]	-6 (-2)[1]	2 (2)[1]
Costa Rica	6 (4)[1]	0 (-3)[1]	-14 (-14)[1]
Guatemala	10 (10)[1]	-3 (-2)[1]	-1 (-1)[1]
Mexico	12 (14)[1]	-1 (1)[1]	2 (2)[1]
Panama	4 (3)[1]	0 (-1)[1]	-2 (-3)[1]
Peru	7 (7)[1]	1 (1)[1]	-4 (-5)[1]
United States	18 (20)[1]	1 (1)[1]	2 (1)[1]
Asia Pacific			
Australia	14 (14)[1]	-1 (0)[1]	1 (1)[1]
China	10 (10)[1]	3 (3)[1]	2 (2)[1]
Hong Kong	18 (18)[1]	1 (1)[1]	2 (2)[1]
India	12 (12)[1]	-2 (-1)[1]	-9 (-10)[1]
Japan	26 (27)[1]	4 (1)[1]	3 (3)[1]
New Zealand	17 (16)[1]	1 (1)[1]	1 (1)[1]
Singapore	9 (10)[1]	-4 (-3)[1]	0 (0)[1]
Taiwan	18 (21)[1]	-2 (0)[1]	-4 (-4)[1]
EMEA†			
Austria	2 (5)[1]	-2 (0)[1]	5 (5)[1]
Belgium	5 (6)[1]	-1 (0)[1]	3 (3)[1]
Bulgaria	4 (8)[1]	-3 (-2)[1]	-5 (-5)[1]
Croatia	14	5	–
Czech Republic	2 (4)[1]	-4 (-2)[1]	-1 (-1)[1]
Finland	-1 (7)[1]	-6 (-1)[1]	-5 (-2)[1]
France	3 (4)[1]	1 (2)[1]	2 (2)[1]
Germany	5 (8)[1]	-6 (-1)[1]	2 (2)[1]
Greece	12 (18)[1]	0 (1)[1]	5 (5)[1]
Hungary	12 (15)[1]	-3 (-2)[1]	1 (1)[1]
Ireland	5 (8)[1]	-4 (-1)[1]	2 (3)[1]
Israel	5 (7)[1]	-2 (-1)[1]	-4 (-6)[1]
Italy	2 (3)[1]	1 (1)[1]	3 (3)[1]
Netherlands	3 (4)[1]	-2 (-1)[1]	-1 (-1)[1]
Norway	4 (5)[1]	1 (0)[1]	-4 (-4)[1]
Poland	8 (12)[1]	-4 (-1)[1]	1 (1)[1]
Portugal	9	1	-4
Romania	10 (15)[1]	-5 (-2)[1]	0 (-1)[1]
Slovakia	8 (10)[1]	-1 (-1)[1]	-1 (-1)[1]
Slovenia	19 (19)[1]	3 (1)[1]	6 (6)[1]
South Africa	5 (4)[1]	-1 (-2)[1]	-2 (-2)[1]
Spain	2 (3)[1]	-2 (-2)[1]	-1 (-1)[1]
Sweden	5 (5)[1]	-2 (-3)[1]	1 (1)[1]
Switzerland	0 (2)[1]	3 (4)[1]	-1 (-1)[1]
Turkey	-4 (4)[1]	-12 (-8)[1]	-10 (-10)[1]
UK	**6 (6)[1]**	**2 (1)[1]**	**2 (2)[1]**

Quarter 1 2019 Net Employment Outlook

†EMEA – Europe, Middle East and Africa.

* Indicates unadjusted data.

1. Number in parentheses is the Net Employment Outlook when adjusted to remove the impact of seasonal variations in hiring activity. Please note that this data is not available for all countries as a minimum of 17 quarters worth of data is required.

International Comparisons – EMEA

More than 21,000 employers took part in the survey for the first quarter of 2019 across 26 countries in the Europe, Middle East and Africa (EMEA) region. Employers in all 26 countries expect to increase payrolls during the next three months, with the most optimistic hiring intentions reported in Slovenia and Greece. The most cautious hiring plans in the region are reported by employers in Switzerland, Spain and Italy.

Employers in Europe's four largest economies expect first-quarter job gains. For the fifth consecutive quarter, employers in Germany report that region's strongest hiring plans, fuelled by stronger hiring sentiment in the Manufacturing sector. UK employers report slightly improved hiring plans when compared with the same period last year, with Construction sector employers reporting the most optimistic first-quarter forecast. Employers in France and Italy report more modest hiring prospects, although Outlooks strengthen in both countries when compared with the final quarter of 2018. In France, hiring sentiment is slightly stronger both quarter-over-quarter and year-over-year, aided by upbeat hiring plans for the Transport, Storage & Communication sector. Employers in Italy report the most confident hiring plans in eight years, driven by the strongest Manufacturing sector forecast since the survey started in 2003.

Elsewhere in Western Europe employers also report cautious optimism for the next three months. Hiring intentions recover in Switzerland, with employers now expecting limited job gains following the uncertain forecast reported for the final quarter of 2018. Employers in Austria report no change on the previous quarter, despite the strongest Finance, Insurance, Real Estate & Business Services sector results reported in more than four years. In Belgium, employers report unchanged hiring prospects when compared with the previous quarter, expecting modest payroll growth to continue. Meanwhile, Netherlands' Outlook declines for the third consecutive quarter due, in part, to a recruitment slump in the Manufacturing sector.

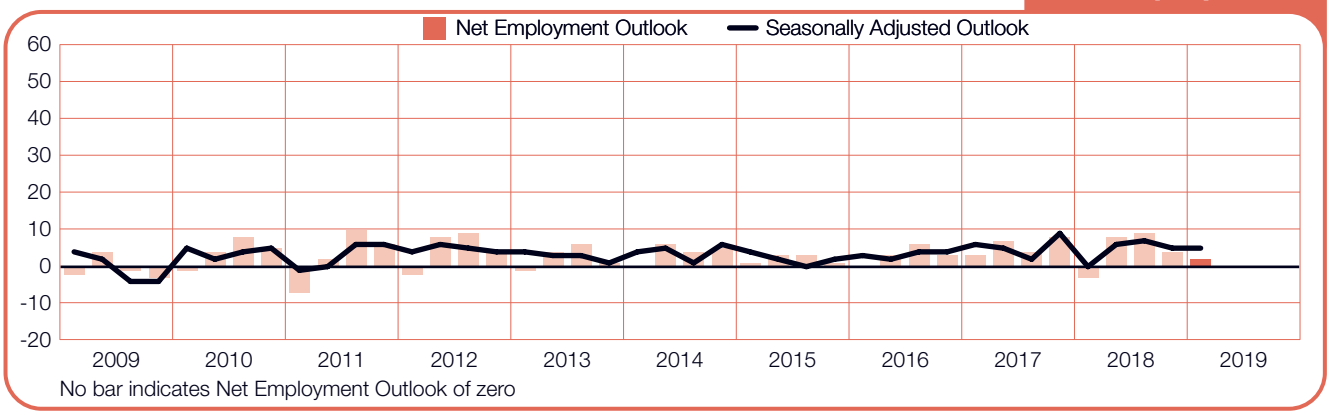
Hiring prospects are more positive in most of Eastern Europe. Employer confidence is moderately stronger in Slovenia when compared to this time one year ago, with healthy gains expected in both the Construction and Manufacturing sectors. Respectable job gains are also anticipated in Romania, despite a slight quarter-over-quarter decline in hiring sentiment. Romania's Manufacturing sector Outlook weakens in comparison with both the previous quarter and the first quarter of 2018, but remains one of the strongest in EMEA. Employers in Poland continue to forecast positive workforce gains, fuelled by the strongest Transportation, Storage & Communications sector forecast in five years.

In all three Nordic nations employers expect modest first-quarter payroll gains. Hiring plans are most optimistic in Finland, due in part to the strongest Outlook in four years for the Transport, Storage & Communications sector. Employers in Sweden report slightly weaker hiring sentiment in comparison with the prior quarter, in part reflecting the weakest Outlook in more than four years in the Wholesale & Retail Trade sector. The Norwegian Outlook is unchanged quarter-over-quarter, despite the Greater Oslo Outlook slipping to its weakest level in over three years.

Contrasting fortunes are forecast in Eastern Mediterranean countries. Employers in Greece have recovered the confidence lost during the economic crisis, reporting the strongest hiring intentions in more than 10 years. Meanwhile, the Turkish currency crisis has triggered the weakest hiring climate since the country was first included in the survey eight years ago. Employers in seven of 11 Turkish industry sectors predict the weakest labour markets since the survey began.

Austria

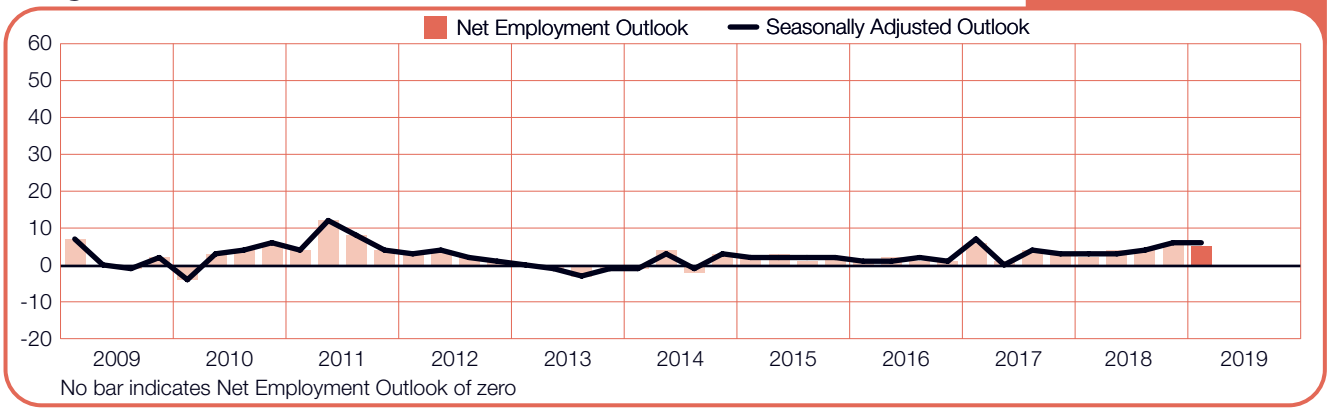
+2 (+5)%



No bar indicates Net Employment Outlook of zero

Belgium

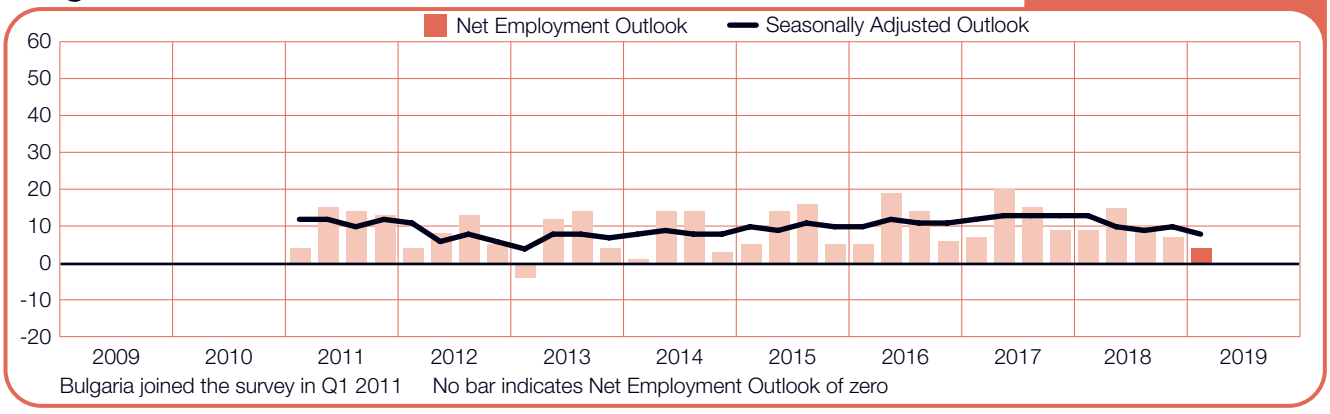
+5 (+6)%



No bar indicates Net Employment Outlook of zero

Bulgaria

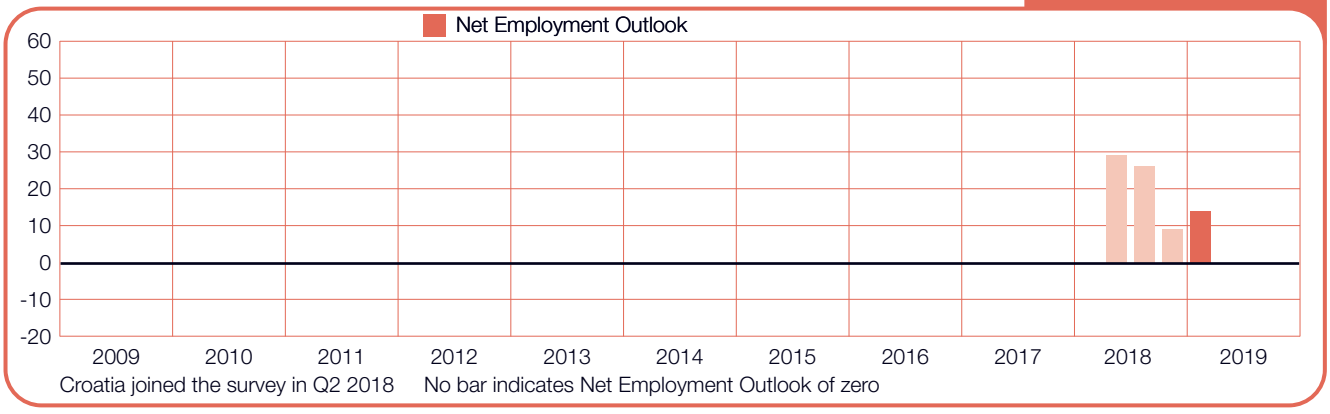
+4 (+8)%



Bulgaria joined the survey in Q1 2011 No bar indicates Net Employment Outlook of zero

Croatia

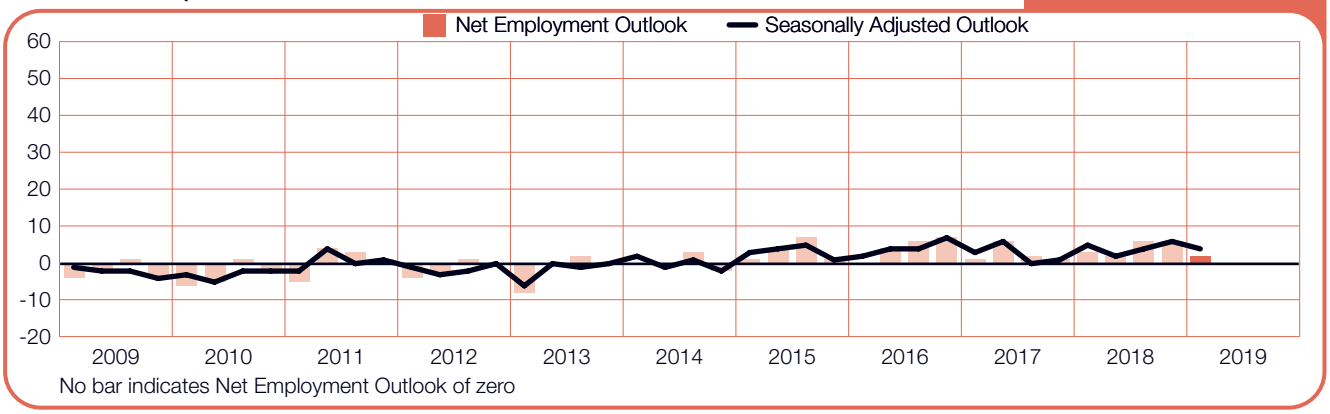
+14%



Croatia joined the survey in Q2 2018 No bar indicates Net Employment Outlook of zero

Czech Republic

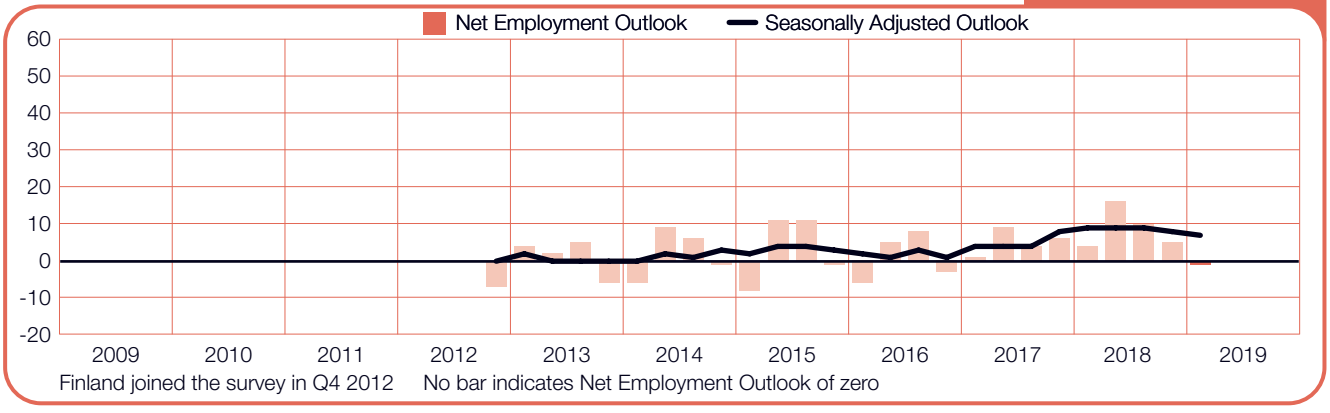
+2 (+4)%



No bar indicates Net Employment Outlook of zero

Finland

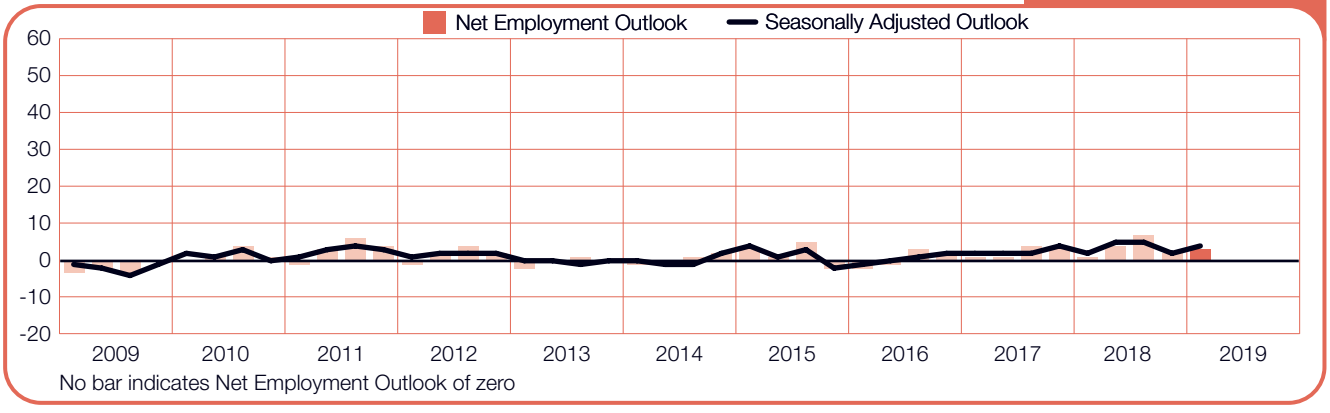
-1 (+7)%



Finland joined the survey in Q4 2012 No bar indicates Net Employment Outlook of zero

France

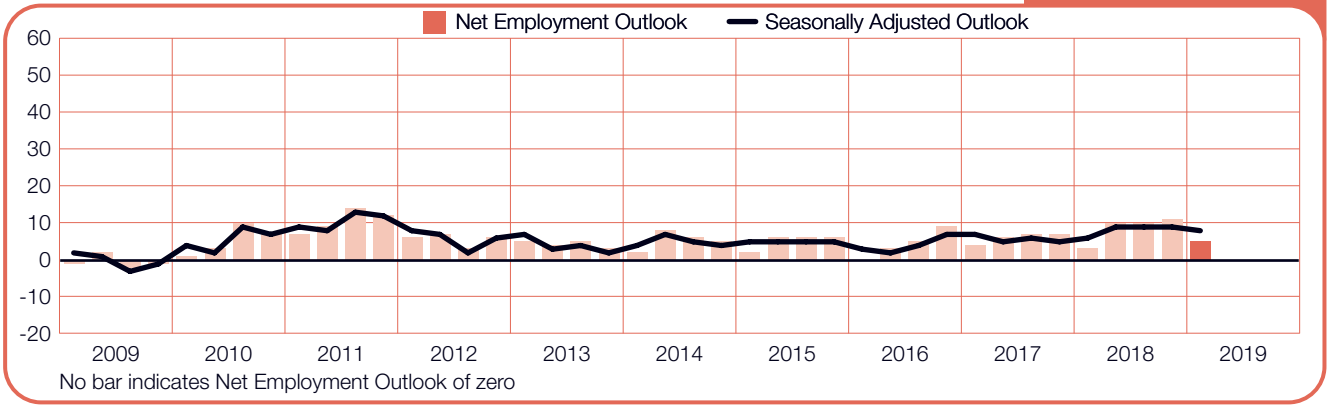
+3 (+4)%



No bar indicates Net Employment Outlook of zero

Germany

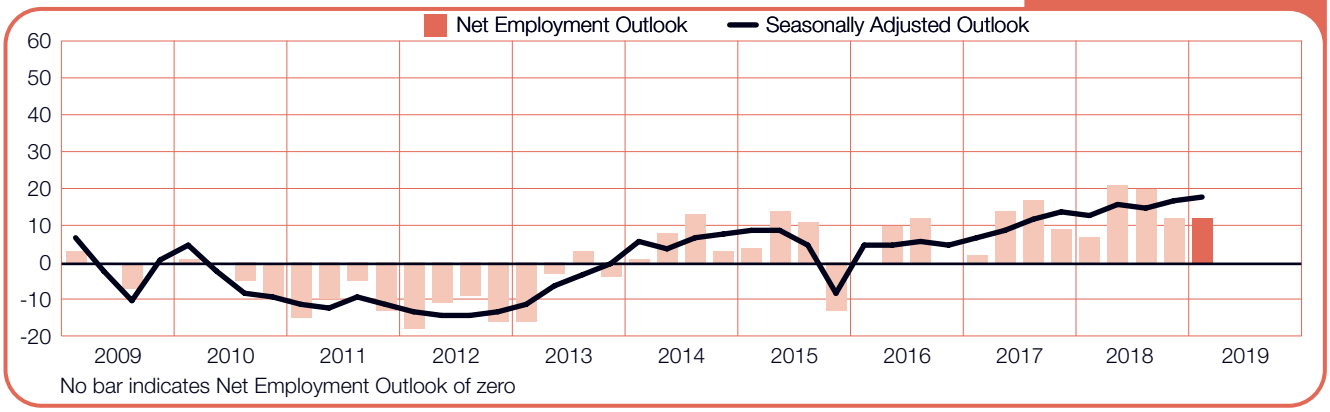
+5 (+8)%



No bar indicates Net Employment Outlook of zero

Greece

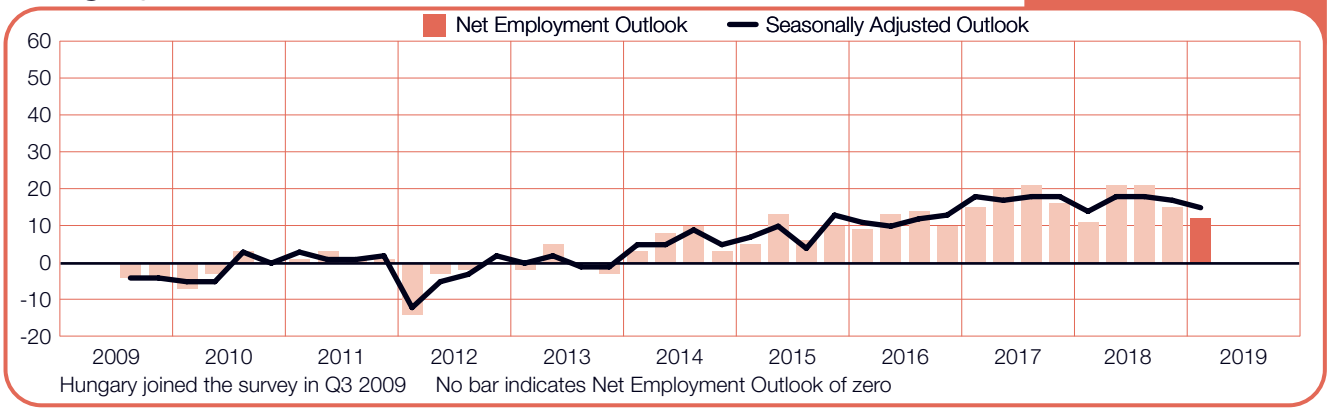
+12 (+18)%



No bar indicates Net Employment Outlook of zero

Hungary

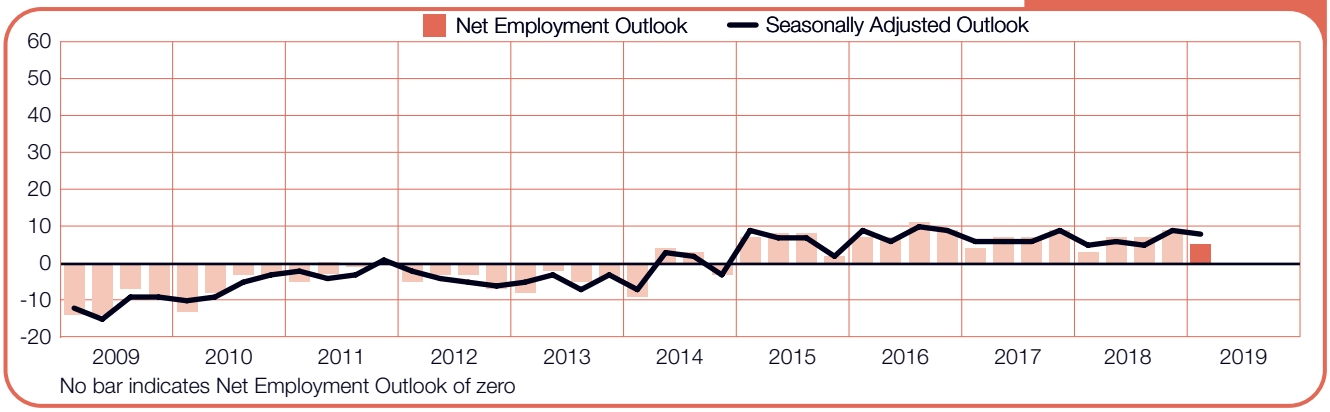
+12 (+15)%



Hungary joined the survey in Q3 2009 No bar indicates Net Employment Outlook of zero

Ireland

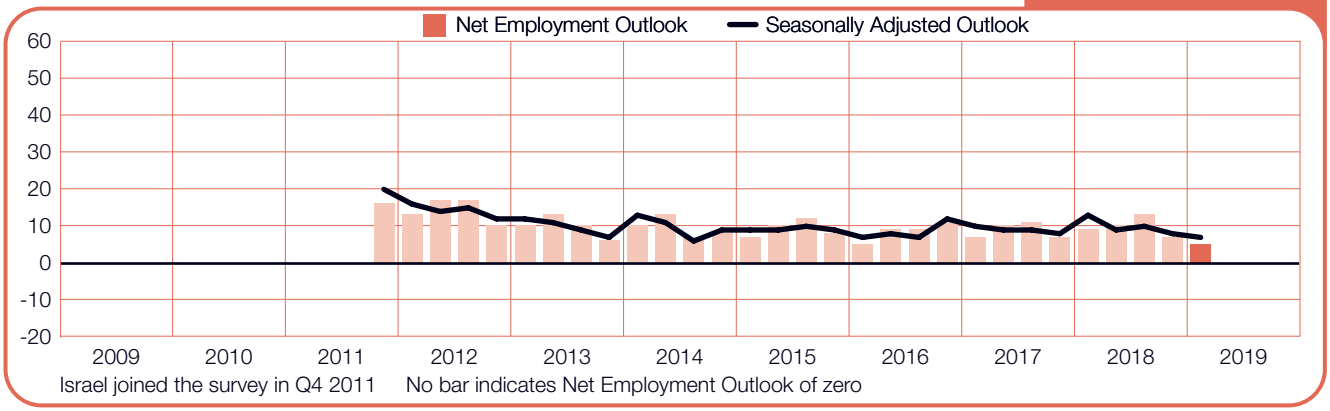
+5 (+8)%



No bar indicates Net Employment Outlook of zero

Israel

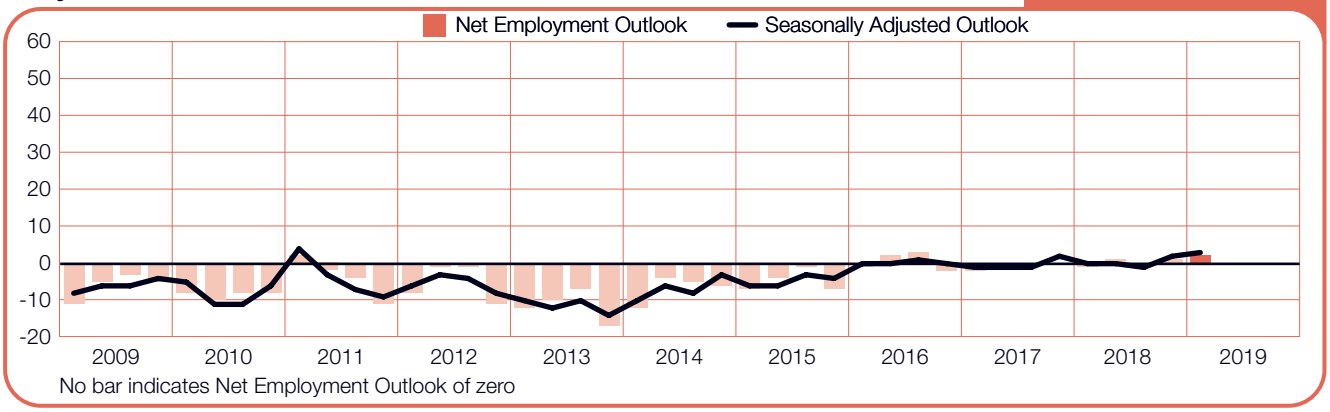
+5 (+7)%



Israel joined the survey in Q4 2011 No bar indicates Net Employment Outlook of zero

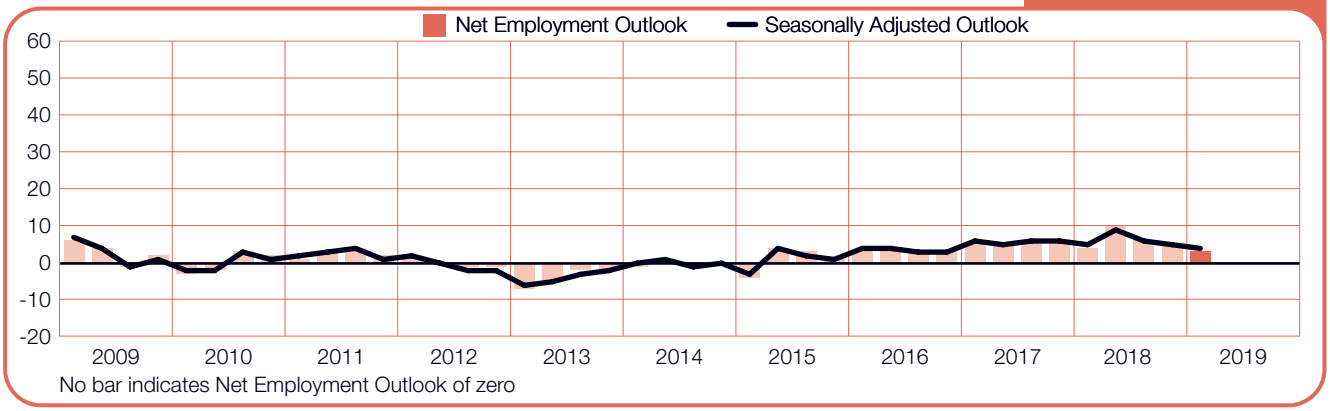
Italy

+2 (+3)%



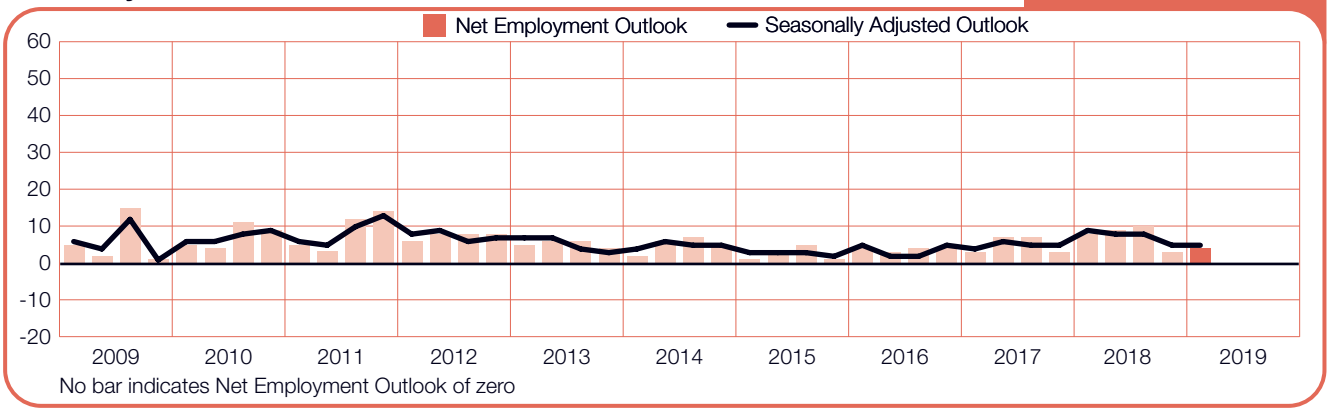
Netherlands

+3 (+4)%



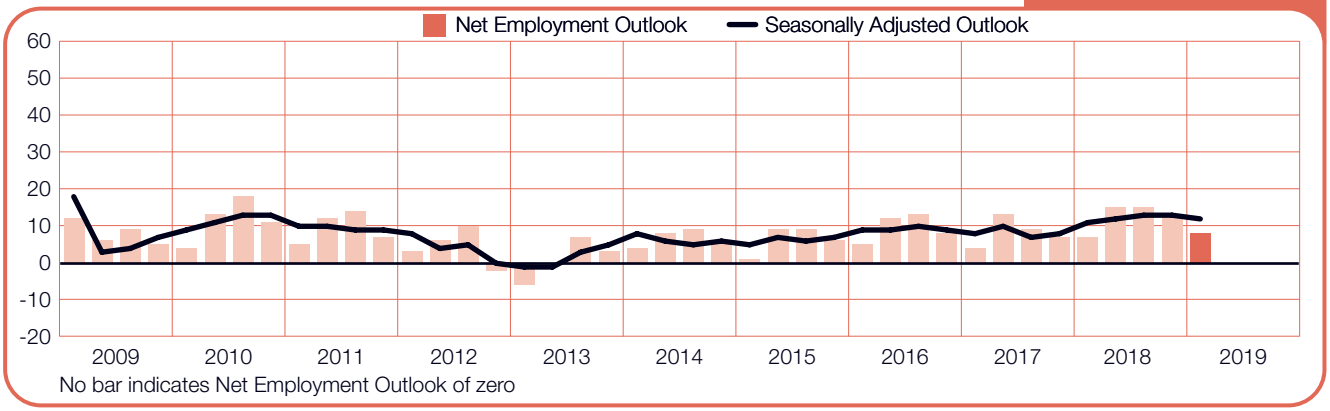
Norway

+4 (+5)%



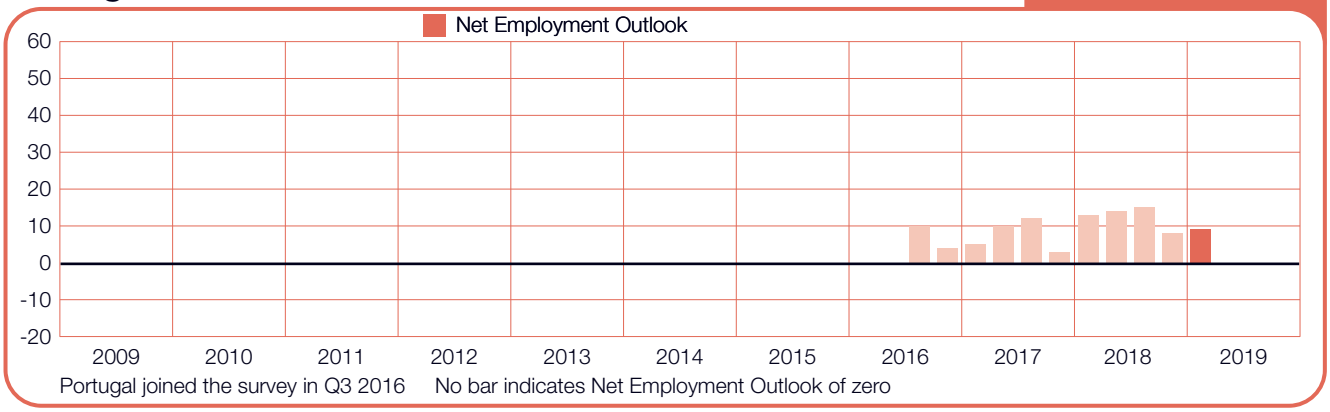
Poland

+8 (+12)%



Portugal

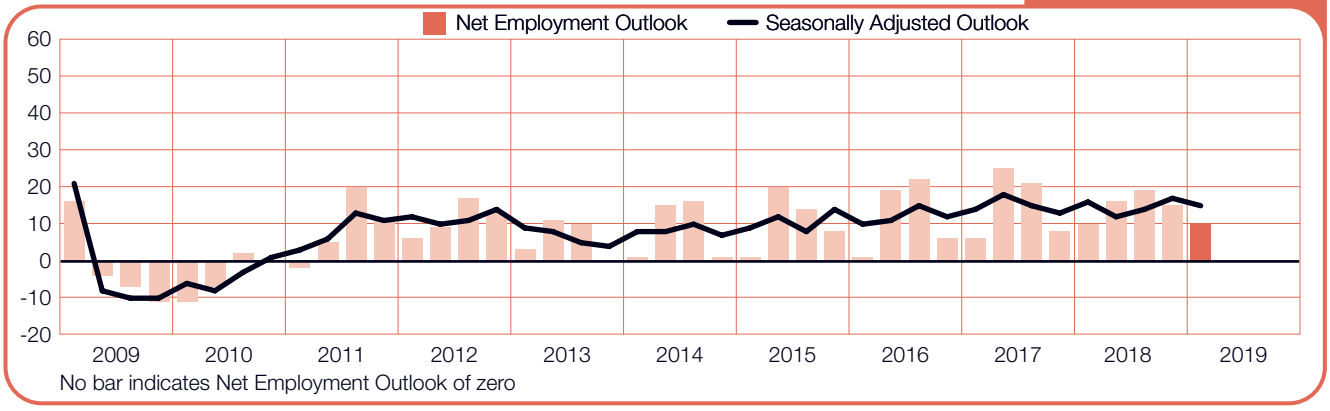
+9%



Portugal joined the survey in Q3 2016 No bar indicates Net Employment Outlook of zero

Romania

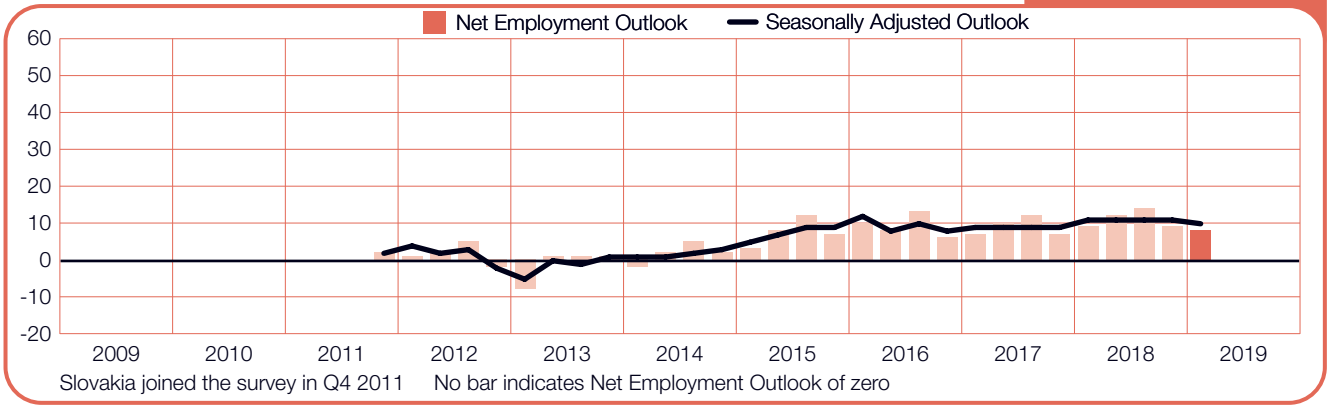
+10 (+15)%



No bar indicates Net Employment Outlook of zero

Slovakia

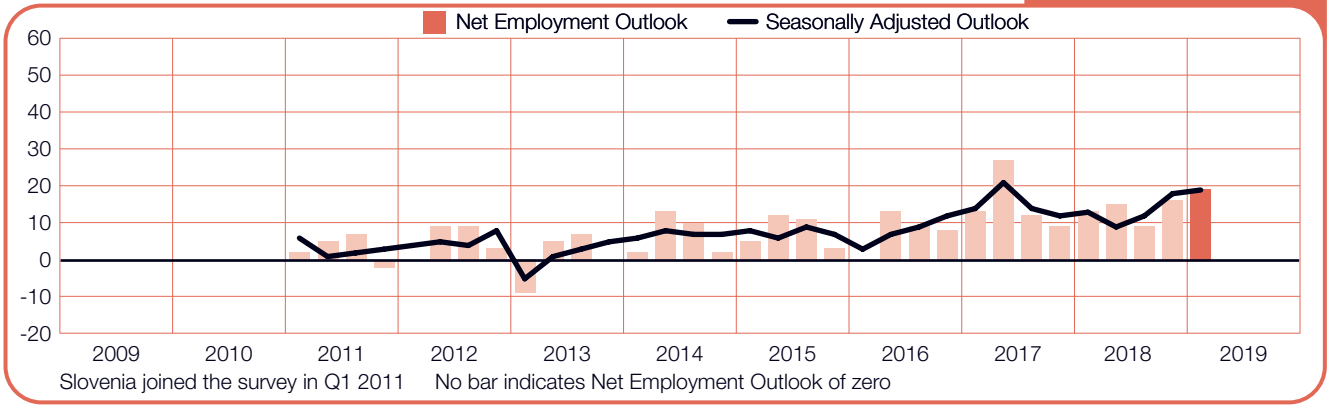
+8 (+10)%



Slovakia joined the survey in Q4 2011 No bar indicates Net Employment Outlook of zero

Slovenia

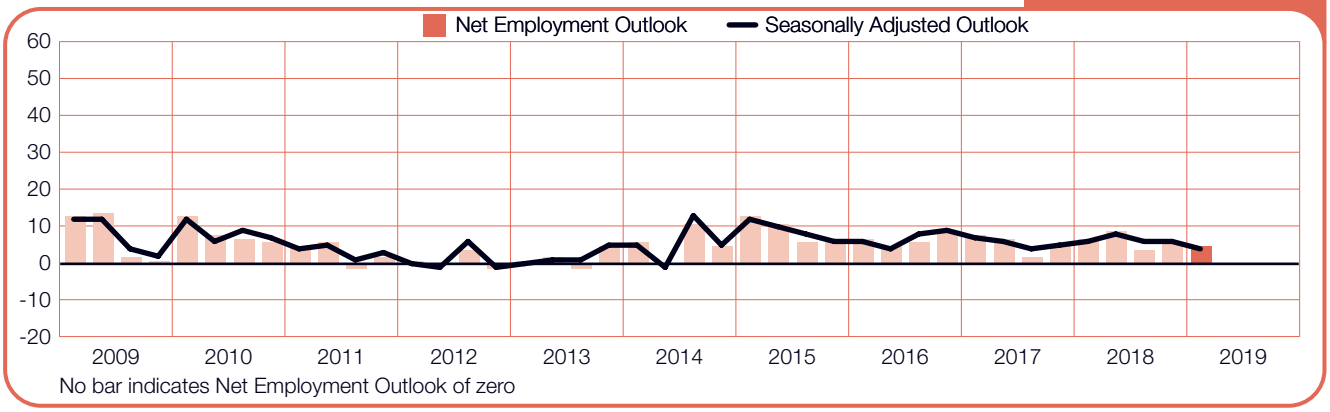
+19 (+19)%



Slovenia joined the survey in Q1 2011 No bar indicates Net Employment Outlook of zero

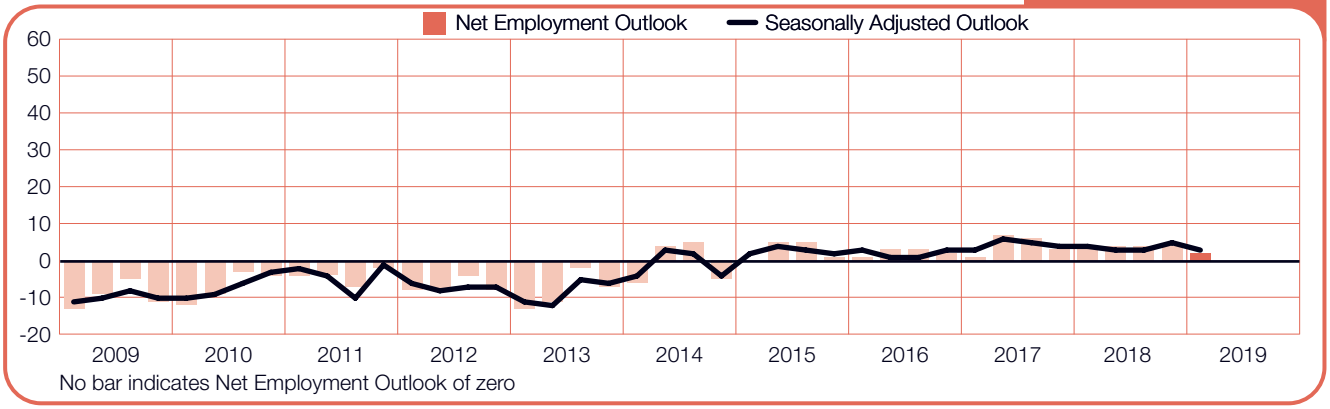
South Africa

+5 (+4)%



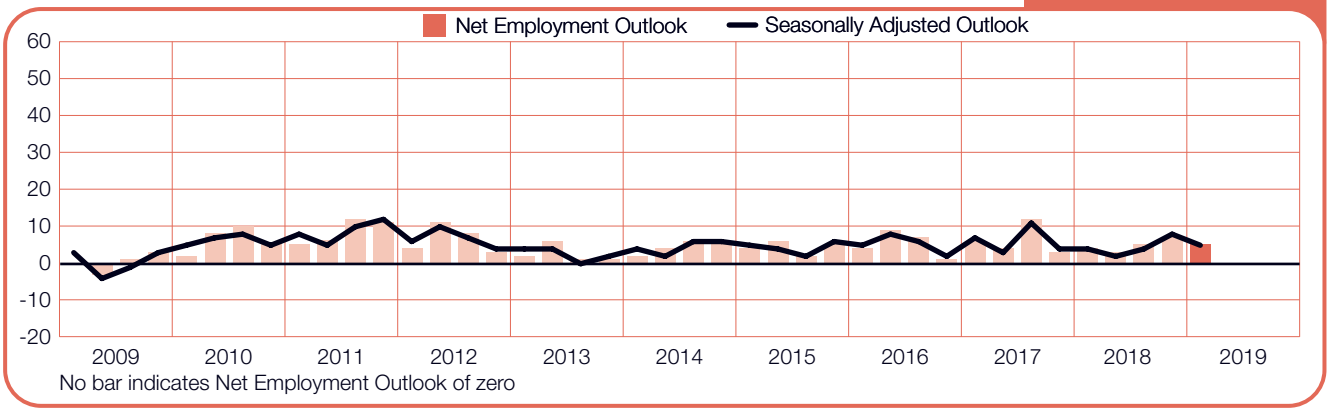
Spain

+2 (+3)%



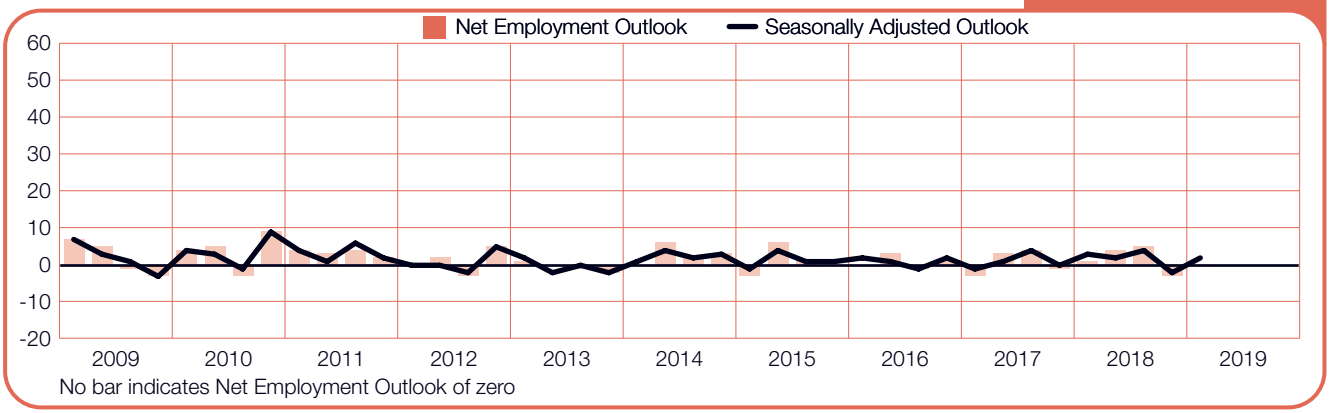
Sweden

+5 (+5)%



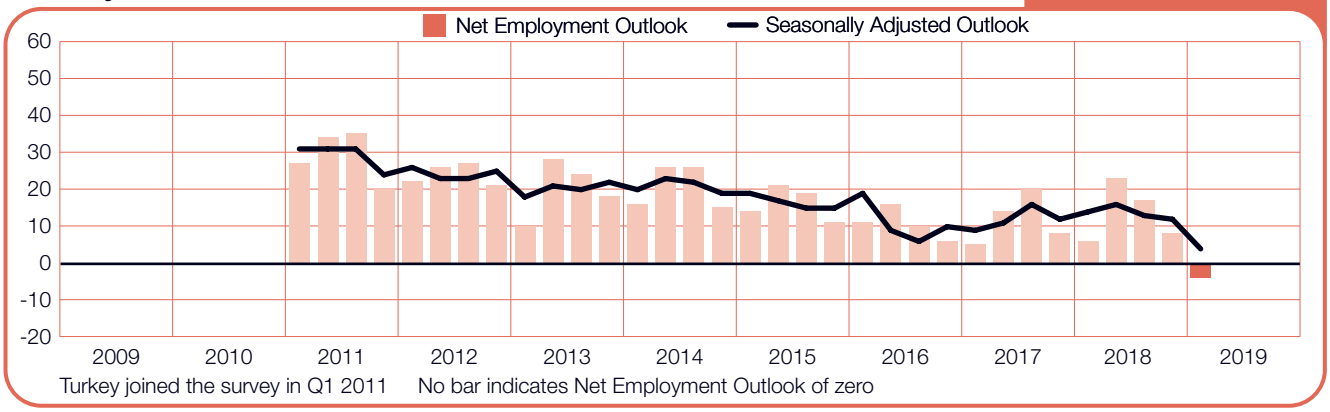
Switzerland

0 (+2)%



Turkey

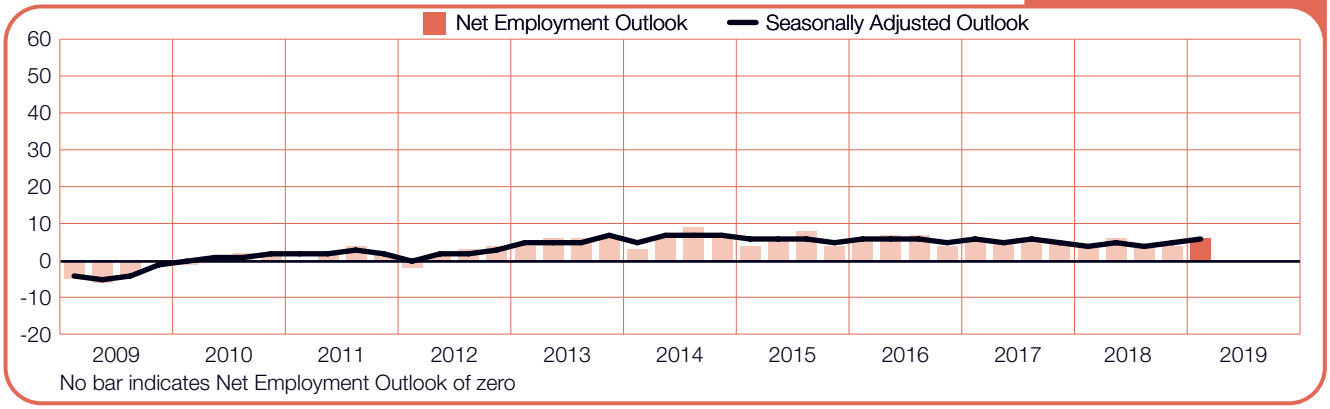
-4 (+4)%



Turkey joined the survey in Q1 2011 No bar indicates Net Employment Outlook of zero

United Kingdom

+6 (+6)%



No bar indicates Net Employment Outlook of zero

International Comparisons – Americas

The survey for the first quarter of 2019 is based on over 24,000 interviews with employers across North, Central and South America. Employers in nine of the 10 countries expect job gains in the coming quarter, with only employers in Argentina anticipating overall payroll declines.

The most optimistic hiring sentiment is reported in the United States, where the Outlook is the strongest since 2006, remaining relatively stable in comparison with three months ago and with last year at this time. Transportation & Utilities sector employers anticipate the most active labour market, with employers in the Leisure & Hospitality and Professional & Business Services sectors forecasting similarly strong workforce growth.

Employers in Canada continue to expect steady payroll gains despite a slight Outlook decline in comparison with the previous quarter. The healthiest first-quarter job gains are expected in the Transportation & Public Utilities and the Manufacturing – Durables sectors.

Employers in Mexico forecast slightly stronger payroll gains compared to last year at this time. The Outlook is buoyed by the strongest Transport & Communication sector forecast in more than five years with nearly a quarter of the employers surveyed expecting to add to payrolls in the first quarter.

Across Central America job prospects are mixed. Employers in Costa Rica expect the weakest hiring pace in over nine years, with Outlooks declining considerably across all six industry sectors and all six regions when compared with the same period last year.

Employers in Guatemala expect moderate job gains overall, but hiring sentiment softens in most sectors when compared to last quarter. The Commerce sector forecast is the weakest in more than seven years, and hiring plans dip considerably in the Agriculture, Fishing, Mining & Extraction sector.

Panama's labour market is expected to remain subdued in the next three months, and the Outlook matches the weakest since the survey began nine years ago.

In South America, the economic crisis in Argentina is driving down hiring opportunities, with employers now expecting to trim payrolls during the first quarter of 2019. The most severe cutbacks are expected in the Construction and Transportation & Utilities sectors, while hiring plans in the Mining, the Finance, Insurance & Real Estate and the Agriculture & Fishing sectors are holding steady.

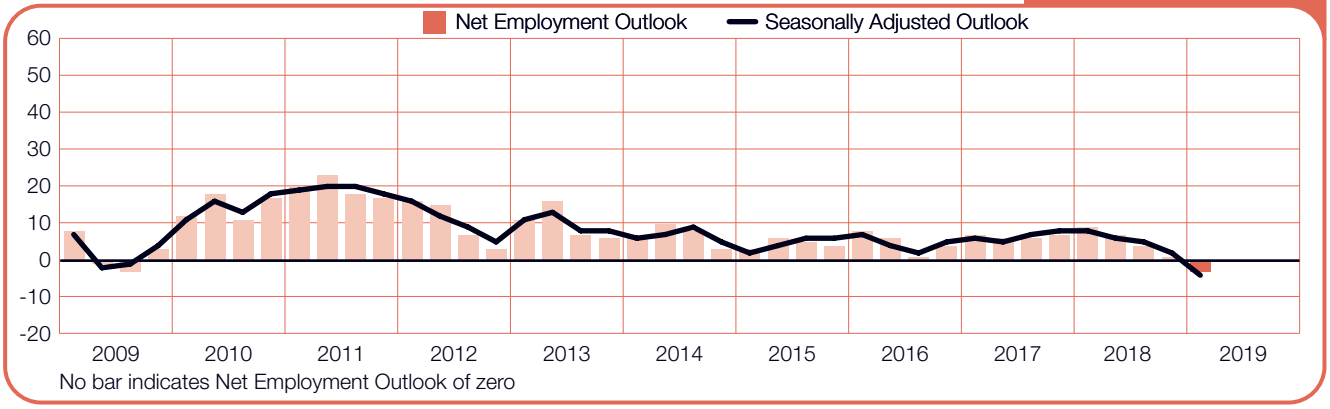
Meanwhile, employers in Brazil continue to report a more favourable hiring climate, expecting to add to payrolls across seven of eight industry sectors and four of five regions. Outlooks are notably stronger in the Wholesale & Retail Trade and the Agriculture, Fishing & Mining sectors when compared with last year at this time.

Employers in Colombia remain cautiously optimistic despite a slight quarter-over-quarter decline. The Mining sector Outlook is the strongest in five years, while Transportation & Utilities sector employers also report notably stronger hiring plans than this time one year ago.

The moderate hiring pace is expected to continue in Peru, remaining relatively stable in comparison with the last quarter of 2018. Mining sector employers report the most optimistic Outlook across Peru's nine industry sectors, moderately strengthening both quarter-over-quarter and year-over-year.

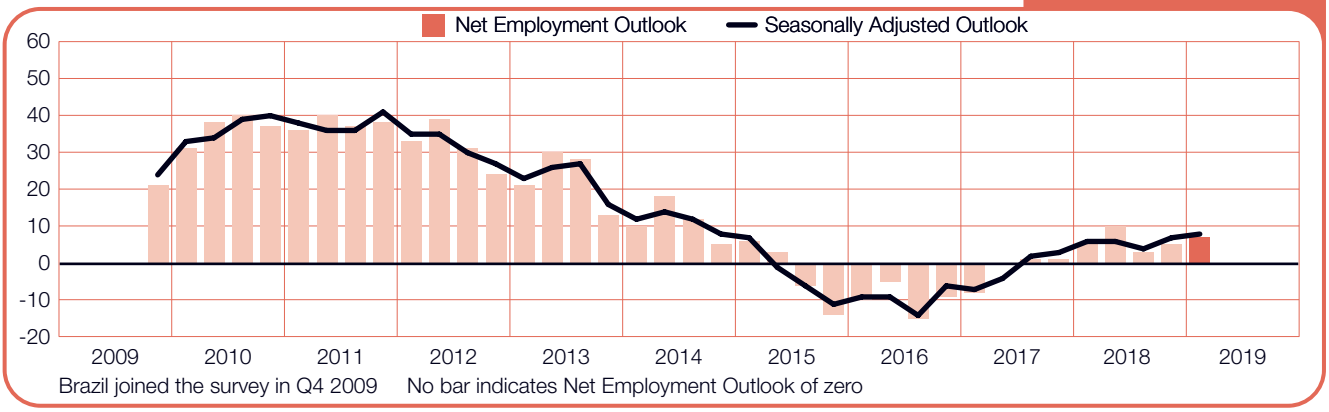
Argentina

-3 (-4)%



Brazil

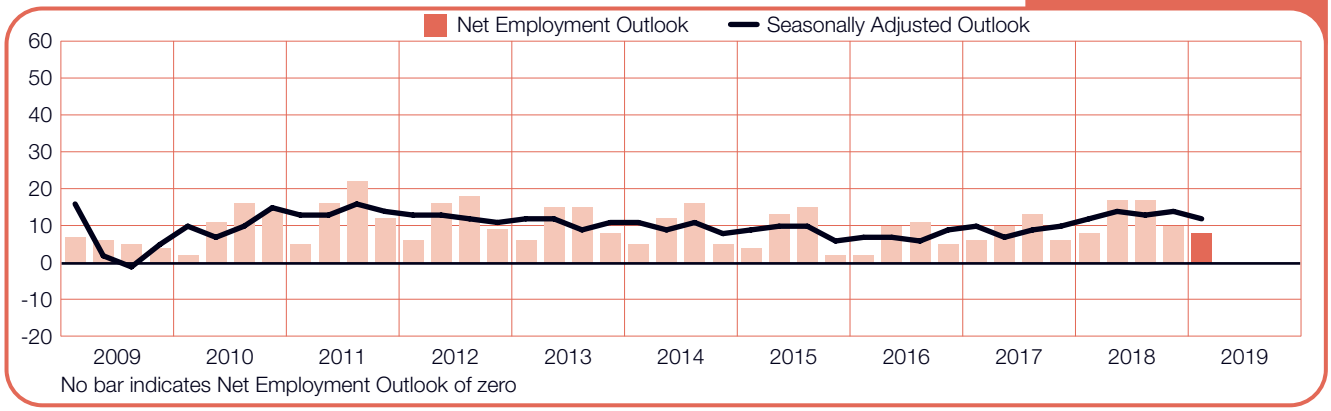
+7 (+8)%



Brazil joined the survey in Q4 2009 No bar indicates Net Employment Outlook of zero

Canada

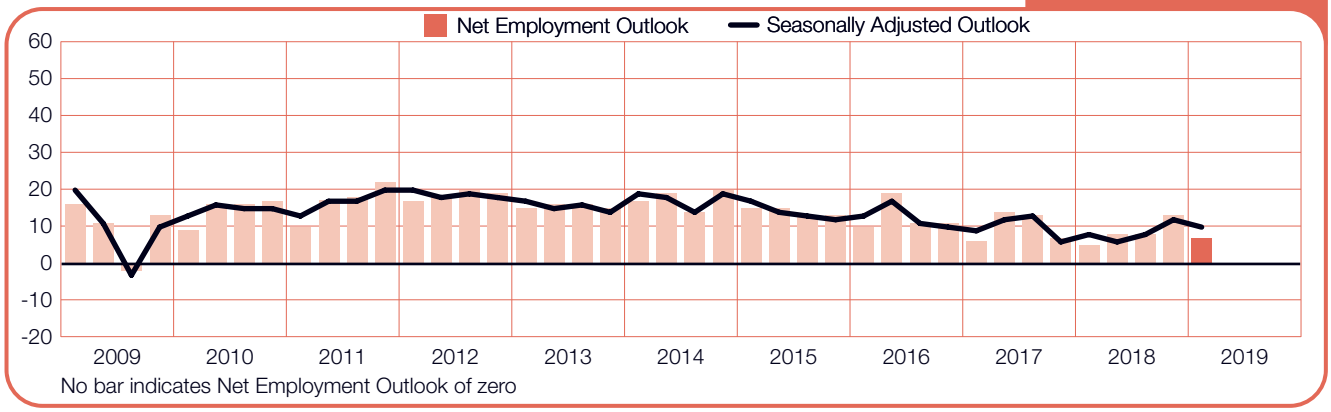
+8 (+12)%



No bar indicates Net Employment Outlook of zero

Colombia

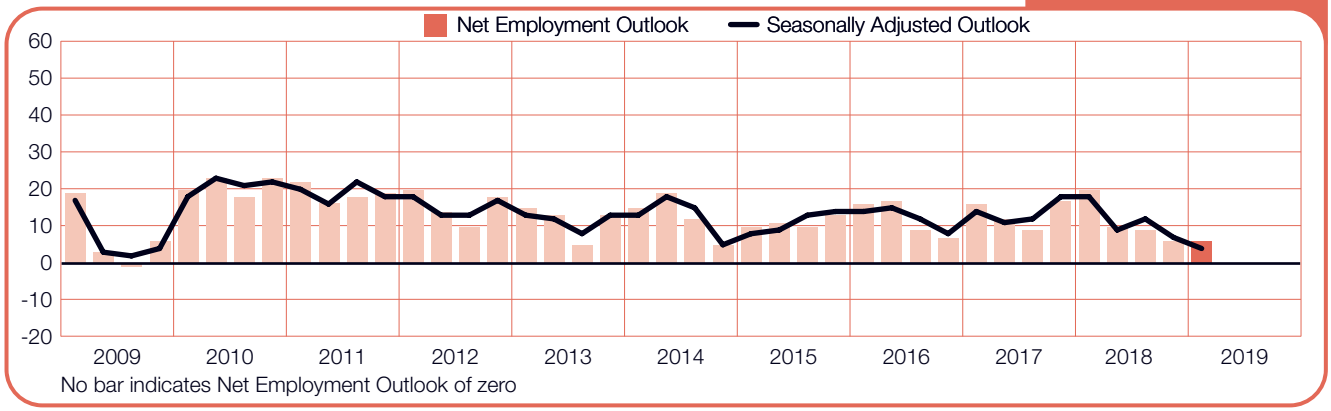
+7 (+10)%



No bar indicates Net Employment Outlook of zero

Costa Rica

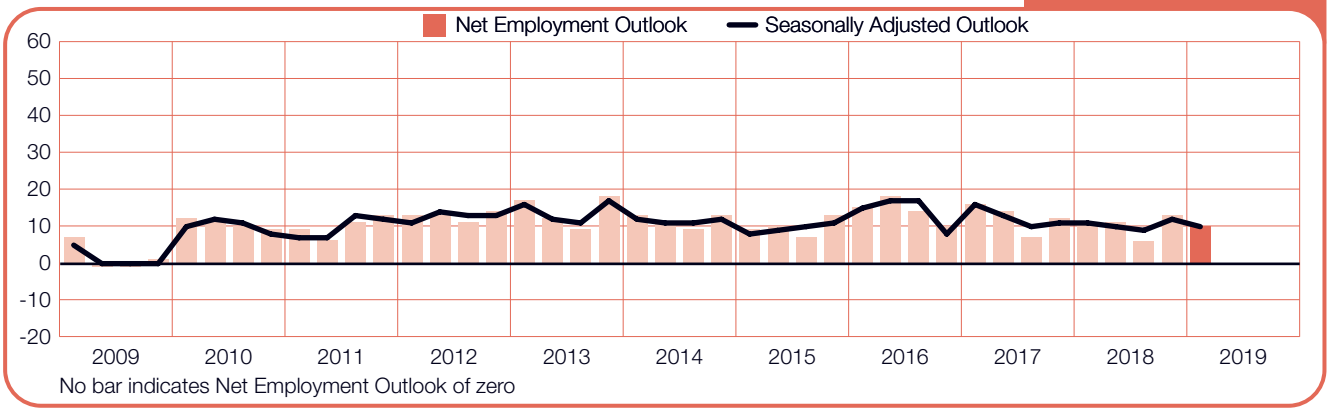
+6 (+4)%



No bar indicates Net Employment Outlook of zero

Guatemala

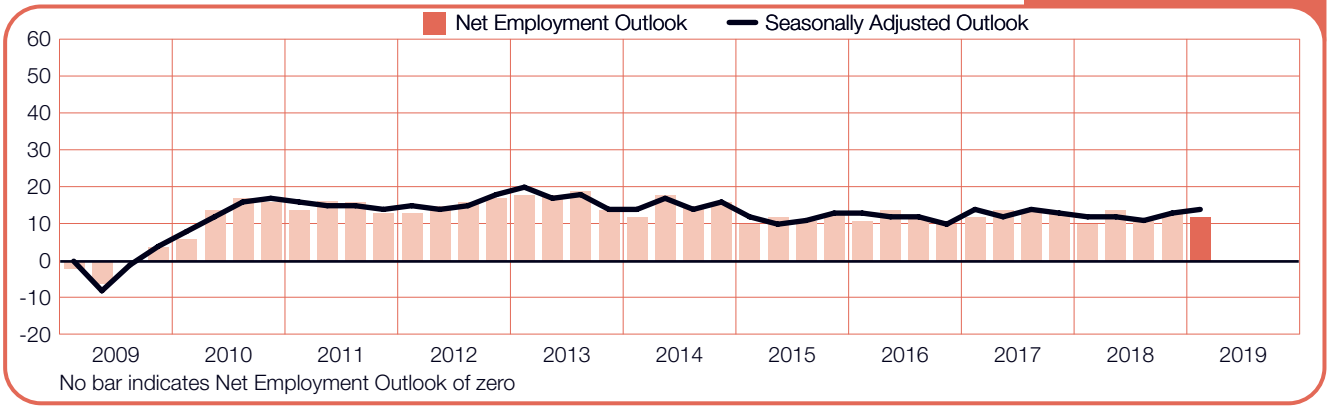
+10 (+10)%



No bar indicates Net Employment Outlook of zero

Mexico

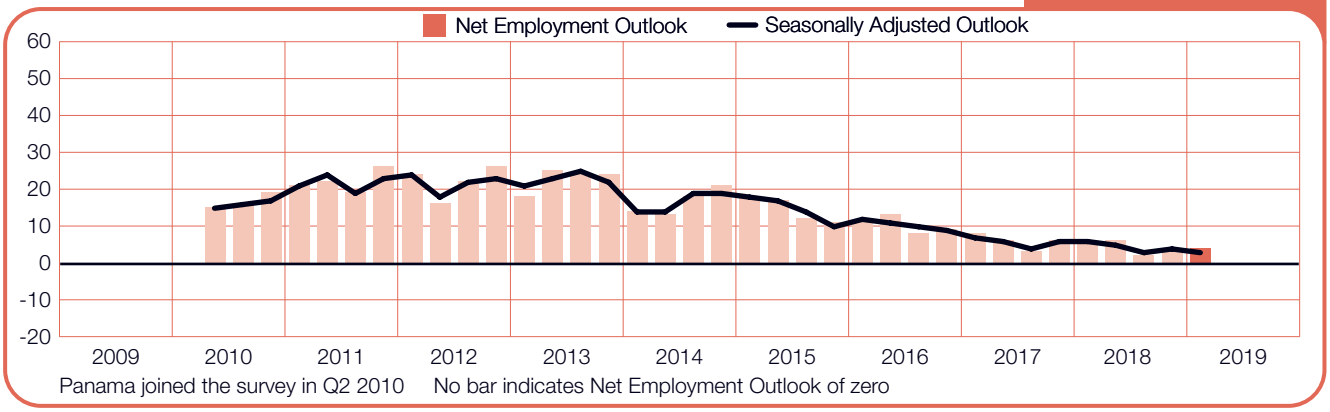
+12 (+14)%



No bar indicates Net Employment Outlook of zero

Panama

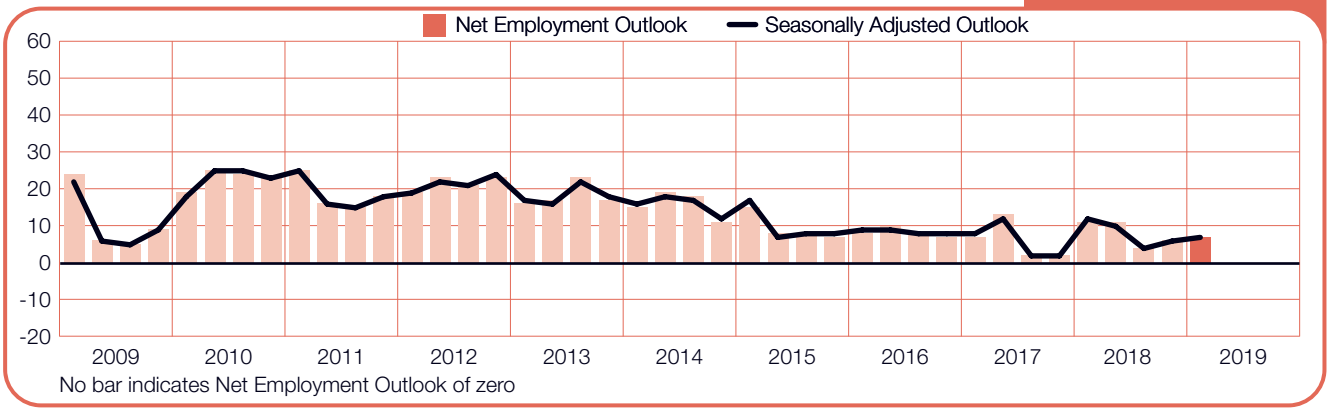
+4 (+3)%



Panama joined the survey in Q2 2010 No bar indicates Net Employment Outlook of zero

Peru

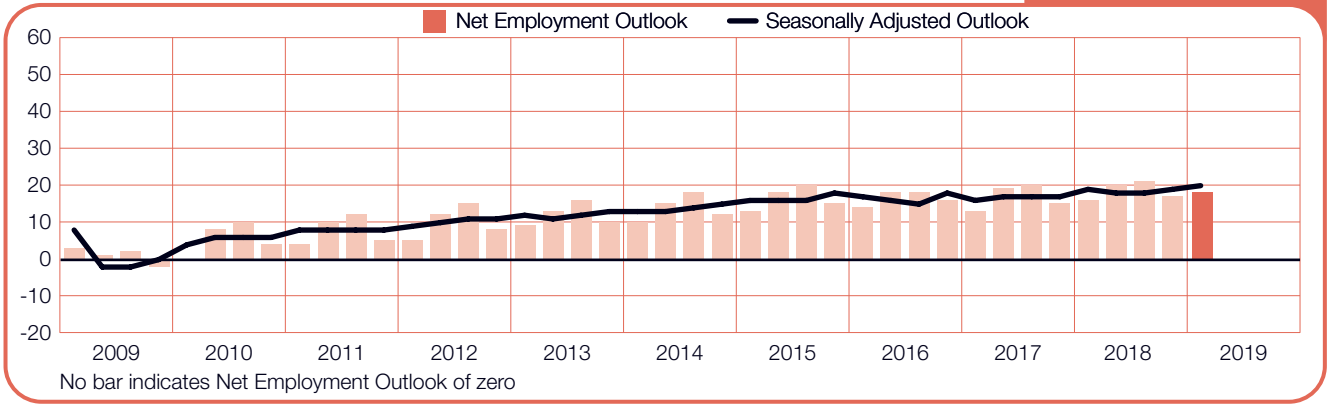
+7 (+7)%



No bar indicates Net Employment Outlook of zero

United States of America

+18 (+20)%



No bar indicates Net Employment Outlook of zero

International Comparisons – Asia Pacific

ManpowerGroup interviewed almost 15,000 employers in the Asia Pacific region about hiring plans for the January-March 2019 period. Payrolls are expected to grow to a varying extent in all eight countries and territories during the coming quarter.

Employers in Japan continue to report the strongest hiring intentions across the Asia Pacific region. Three in ten of those surveyed expect to add to payrolls in the first quarter of 2019, marking the most optimistic forecast since hiring sentiment was first measured in Japan more than 15 years ago. Job prospects are in part driven by bullish hiring confidence in the Transportation & Utilities sector, and employers also report the most optimistic hiring intentions on record in the Mining & Construction and Services sectors.

Taiwan's healthy hiring pace is expected to continue in the next three months. Employers in Taiwan in the Transportation & Utilities and Mining & Construction sectors report the strongest hiring prospects, with Outlooks in both sectors trending stronger in comparison with the same period in 2018.

In Hong Kong, employers report upbeat hiring intentions for the next three months. Hiring prospects are the strongest in seven years, fuelled by growing employer confidence in the Services and Mining & Construction sectors.

Employers in China also report an improvement on the previous quarter – more than one in ten employers expect to increase payrolls by the end of the coming quarter. Hiring sentiment is strongest in the Finance, Insurance & Real Estate and Transportation & Utilities sectors, and Mining & Construction sector employers report their strongest hiring plans in more than three years.

The hiring climate in India during the first quarter of 2019 is expected to be broadly in line with the final quarter of 2018, with a majority of sectors and half of the regions either relatively stable or unchanged from the prior quarter. Zero percent of the Indian employers surveyed expect to reduce payrolls in the upcoming quarter.

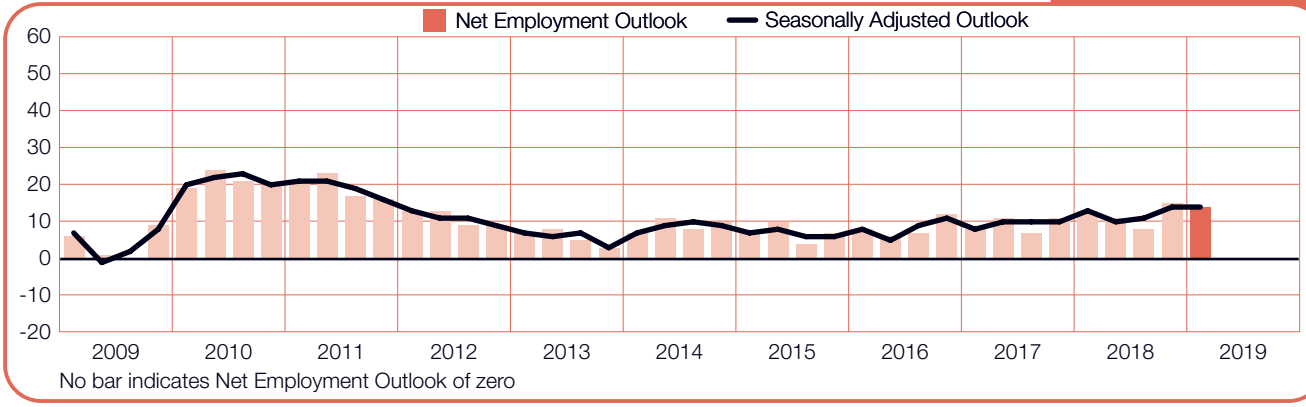
Modest payroll gains are forecast for Singapore in the next three months, but the Outlook is slightly weaker in comparison with the previous quarter. Manufacturing sector employers expect an above average hiring pace reporting their strongest Outlook in more than four years.

Employers in Australia continue to expect steady payroll gains with an unchanged forecast for the first quarter of 2019. Hiring confidence is trending weaker for the Finance, Insurance & Real Estate and Transportation & Utilities sectors when compared with the final quarter of 2018, but the Wholesale & Retail Trade sector Outlook is strengthening.

The most optimistic hiring climate in more than three years is forecast for the coming quarter in New Zealand. Employers in the Public Administration & Education sector report the healthiest hiring prospects in over five years, and Mining & Construction sector employers report a strong recovery in comparison with the previous quarter.

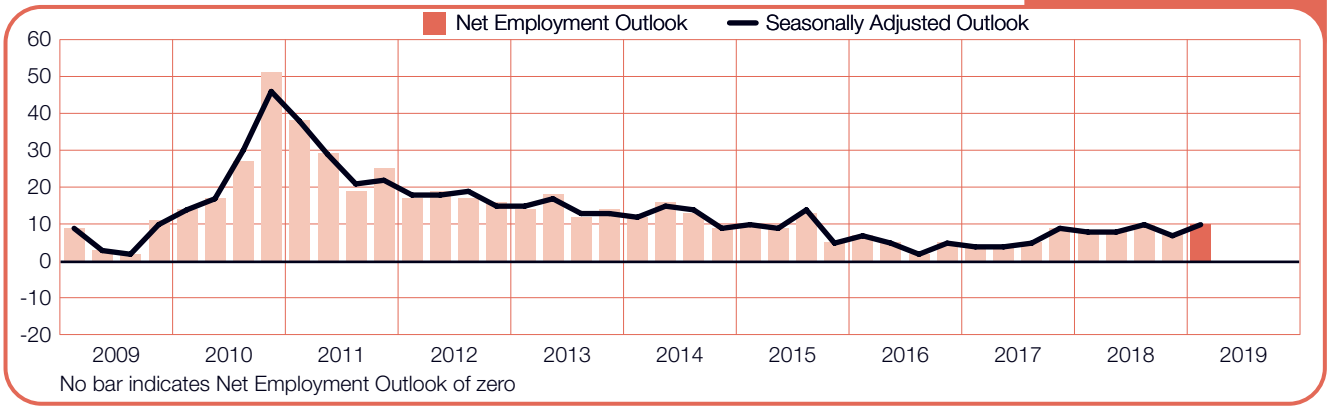
Australia

+14 (+14)%



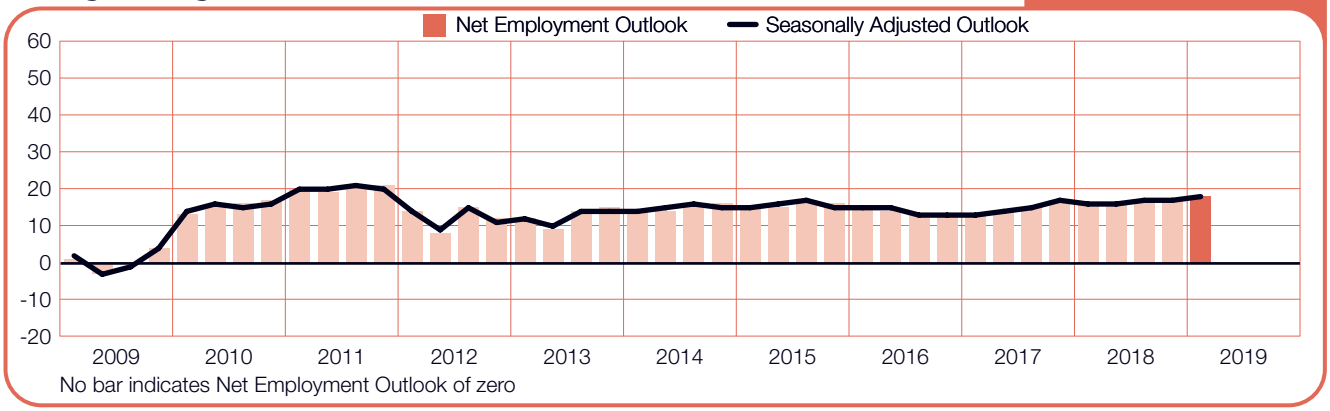
China

+10 (+10)%



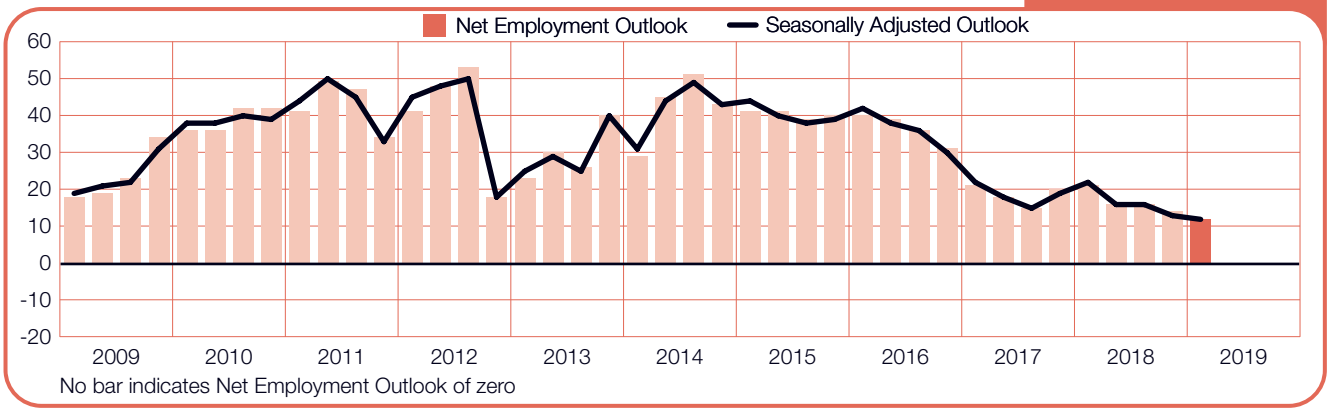
Hong Kong

+18 (+18)%



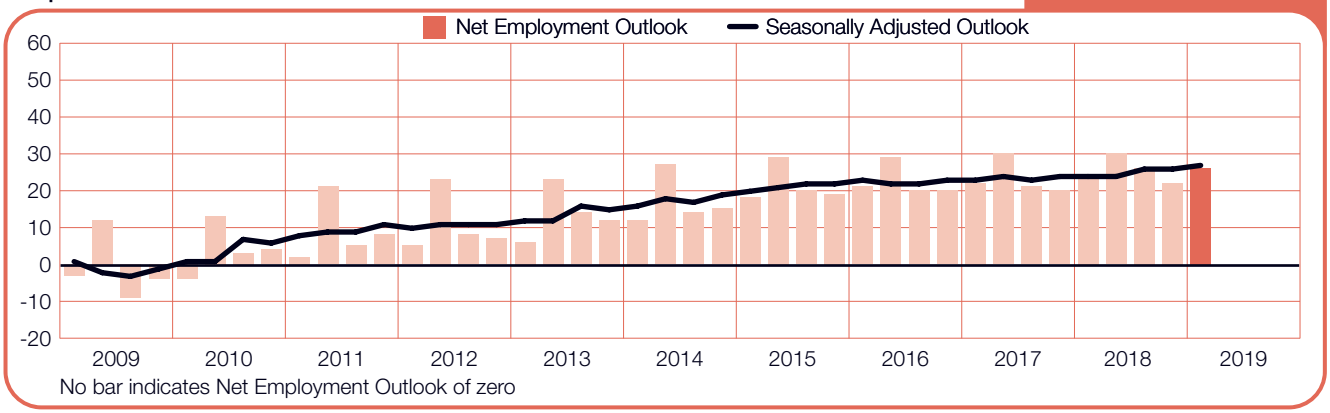
India

+12 (+12)%



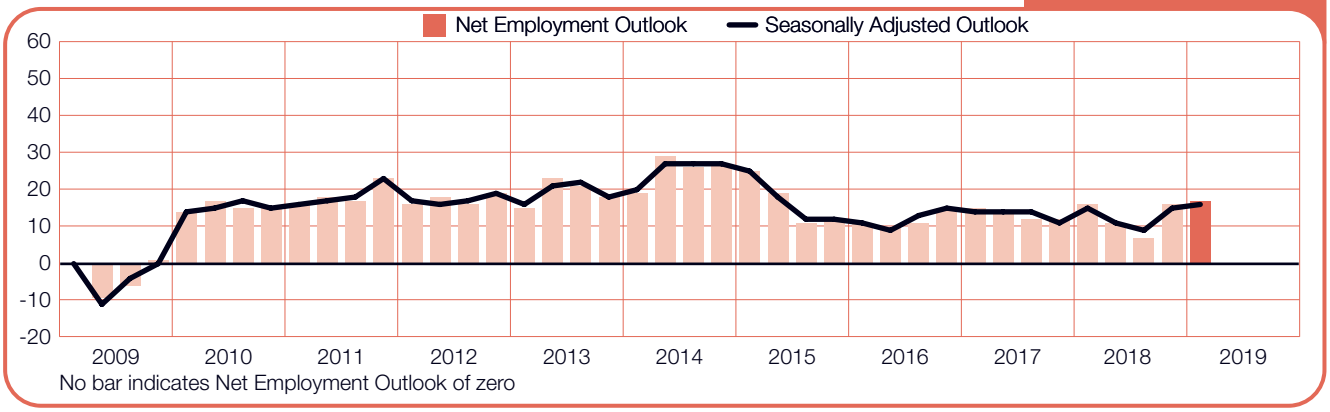
Japan

+26 (+27)%



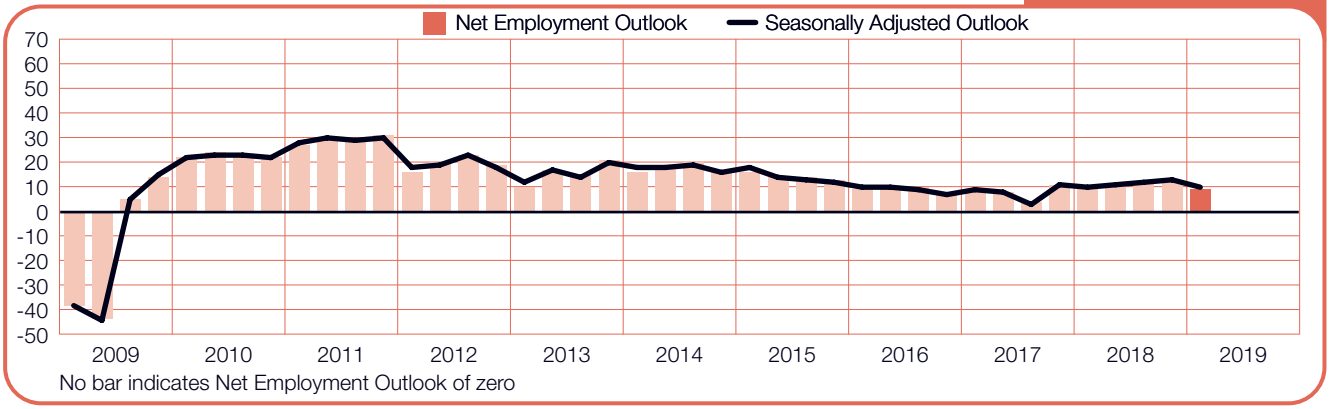
New Zealand

+17 (+16)%



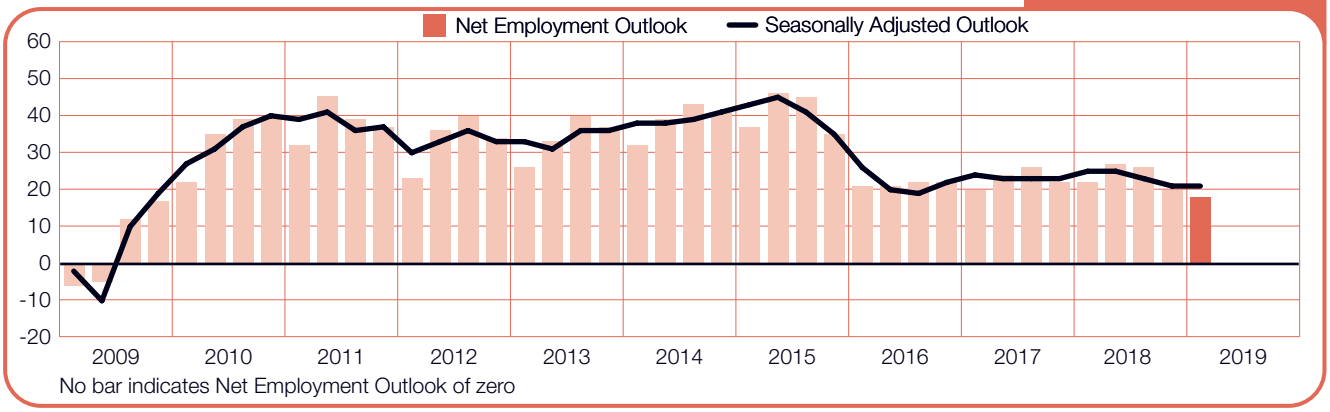
Singapore

+9 (+10)%



Taiwan

+18 (+21)%



About the Survey

The ManpowerGroup Employment Outlook Survey is conducted quarterly to measure employers' intentions to increase or decrease the number of employees in their workforces during the next quarter. ManpowerGroup's comprehensive forecast of employer hiring plans has been running for more than 55 years and is one of the most trusted surveys of employment activity in the world. Various factors underpin the success of the ManpowerGroup Employment Outlook Survey:

Unique: It is unparalleled in its size, scope, longevity and area of focus.

Projective: The ManpowerGroup Employment Outlook Survey is the most extensive, forward-looking employment survey in the world, asking employers to forecast employment over the next quarter. In contrast, other surveys and studies focus on retrospective data to report on what occurred in the past.

Independent: The survey is conducted with a representative sample of employers from throughout the countries and territories in which it is conducted. The survey participants are not derived from ManpowerGroup's customer base.

Robust: The survey is based on interviews with over 60,000 public and private employers across 44 countries and territories to measure anticipated employment trends each quarter. This sample allows for analysis to be performed across specific sectors and regions to provide more detailed information.

Focused: For more than five decades the survey has derived all of its information from a single question:

For the Quarter 1 2019 research, all employers participating in the survey worldwide are asked the same question, "How do you anticipate total employment at your location to change in the three months to the end of March 2019 as compared to the current quarter?"

Methodology

The ManpowerGroup Employment Outlook Survey is conducted using a validated methodology, in accordance with the highest standards in market research. The survey has been structured to be representative of each national economy. The margin of error for all national, regional and global data is not greater than +/- 3.9%.

In the UK, the national survey includes 2,102 employers. With this number of interviews, the margin of error for the UK survey is +/- 2.1%.

Net Employment Outlook

Throughout this report, we use the term "Net Employment Outlook." This figure is derived by taking the percentage of employers anticipating an increase in hiring activity and subtracting from this the percentage of employers expecting to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook. Net Employment Outlooks for countries and territories that have accumulated at least 17 quarters of data are reported in a seasonally adjusted format unless otherwise stated.

Seasonal adjustments have been applied to the data for all participating countries except Croatia and Portugal. ManpowerGroup intends to add seasonal adjustments to the data for other countries in the future, as more historical data is compiled. Note that in Quarter 2 2008, ManpowerGroup adopted the TRAMO-SEATS method of seasonal adjustment for data.

About ManpowerGroup™

ManpowerGroup® (NYSE: MAN), the leading global workforce solutions company, helps organisations 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 organisations 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®, Right Management® and ManpowerGroup® Solutions — creates substantially more value for candidates and clients across 80 countries and territories and has done so for 70 years. In 2018, ManpowerGroup was named one of the World's Most Ethical Companies for the ninth year and one of Fortune's Most Admired Companies for the sixteenth year, confirming our position as the most trusted and admired brand in the industry. See how ManpowerGroup is powering the future of work: www.manpowergroup.com.

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