

**ManpowerGroup  
Employment  
Outlook Survey  
UK**

**Q1  
2020**



ManpowerGroup®

# United Kingdom Employment Outlook

The ManpowerGroup Employment Outlook Survey for the first quarter 2020 was conducted by interviewing a representative sample of 2,101 employers in the UK.

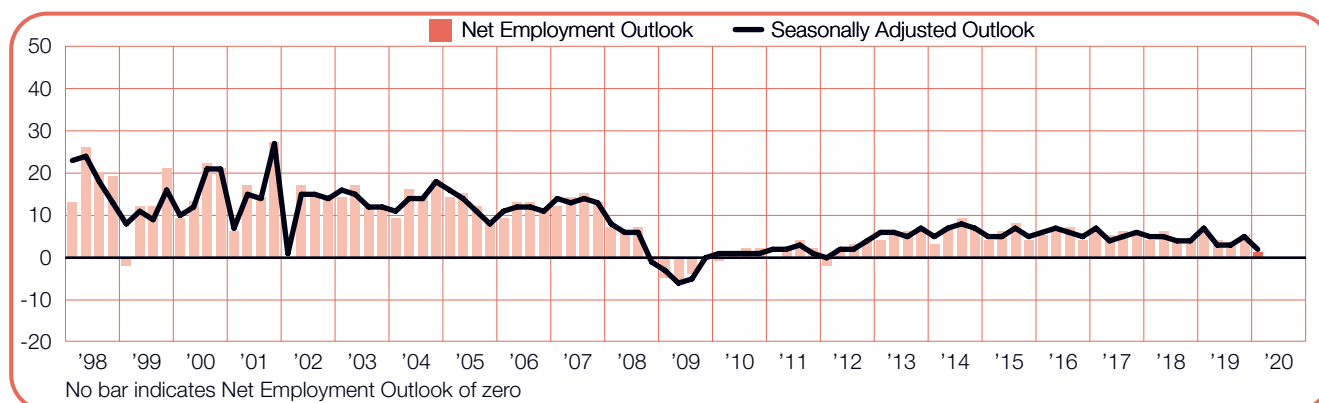
All survey participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of March 2020 as compared to the current quarter?”

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# UK Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Jan-Mar 2020</b>	<b>5</b>	<b>4</b>	<b>90</b>	<b>1</b>	<b>1</b>	<b>2</b>
Oct-Dec 2019	8	3	87	2	5	5
July-Sep 2019	6	3	91	0	3	3
Apr-June 2019	7	3	89	1	4	3
Jan-Mar 2019	8	2	87	3	6	7



Employers in the UK report cautious hiring plans for the January to March time frame. With 5% of employers expecting to increase payrolls, 4% forecasting a decrease and 90% anticipating no change, the resulting Net Employment Outlook is +1%.

Once the data is adjusted to allow for seasonal variation, the Outlook stands at +2%. Hiring sentiment is the weakest reported in seven years, declining by three percentage points in comparison with the previous quarter and by five percentage points when compared 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

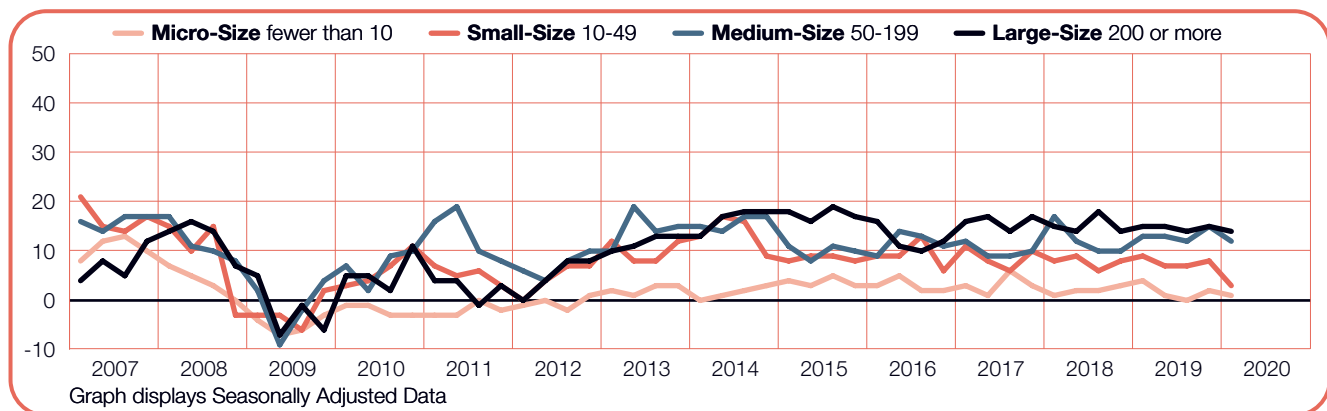
Participating employers are categorised into one of four organisation sizes: Micro-size employers have fewer than 10 employees; Small-size employers have 10-49 employees; Medium-size employers have 50-199 employees; and Large-size employers have 200 or more employees.

Employers anticipate payroll gains in all four organisation size categories during the next three months. Steady workforce growth is forecast by Large- and Medium-size employers, reporting Net Employment Outlooks of +14% and +12%, respectively. Elsewhere, Small-size employers report a cautious Outlook of +3% and the Outlook for Micro-size firms stands at +1%.

When compared with the previous quarter, Small-size employers report a decline of five percentage points, and the Outlook for Medium-size firms is three percentage points weaker. Meanwhile, hiring plans remain relatively stable for Micro- and Large-size employers.

Hiring prospects weaken for Small- and Micro-size employers when compared with this time one year ago, declining by six and three percentage points, respectively. Hiring plans for Medium- and Large-size firms remain relatively stable.

Organisation-Size	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Micro-Size</b> fewer than 10	4	3	93	0	1	1
<b>Small-Size</b> 10-49	6	5	86	3	1	3
<b>Medium-Size</b> 50-199	14	6	78	2	8	12
<b>Large-Size</b> 200 or more	19	6	72	3	13	14



# Regional Summary

Employers in five of the 12 regions expect to increase payrolls during the next three months. The strongest hiring prospects are reported in the West Midlands, where the Net Employment Outlook of +13% reflects hopeful hiring plans. Elsewhere, modest workforce gains are forecast for Scotland and the North West, where Outlooks stand at +6% and +5%, respectively. However, employers in five regions expect to trim payrolls, most notably in the North East where the Outlook is -4%.

Hiring prospects weaken in nine of the 12 regions when compared with the previous quarter. Employers in the East Midlands report the most notable decrease of 15 percentage points, while Outlooks decline by

nine and eight percentage points in Yorkshire & the Humber and the South West, respectively. Meanwhile, hiring plans strengthen in three regions, including Wales, where employers report an increase of six percentage points.

When compared with this time one year ago, hiring intentions weaken in eight of the 12 regions. Considerable decreases of 12 and 11 percentage points are reported in the East Midlands and the East, respectively. However, employers in three regions report stronger Outlooks, most notably with improvements of four percentage points in both Scotland and the West Midlands.

	Increase Q1 2020	Decrease Q1 2020	Q1 2020	Q4 2019	Q1 2019	Qtr on Qtr Change Q4 2019 to Q1 2020	Yr on Yr Change Q1 2019 to Q1 2020
	%	%	%	%	%	%	%
East	2	3	-1 (0) <sup>1</sup>	7 (5) <sup>1</sup>	10 (11) <sup>1</sup>	-8 (-5) <sup>1</sup>	-11 (-11) <sup>1</sup>
East Midlands	4	6	-2 (-2) <sup>1</sup>	15 (13) <sup>1</sup>	10 (10) <sup>1</sup>	-17 (-15) <sup>1</sup>	-12 (-12) <sup>1</sup>
London	3	5	-2 (-1) <sup>1</sup>	5 (4) <sup>1</sup>	3 (4) <sup>1</sup>	-7 (-5) <sup>1</sup>	-5 (-5) <sup>1</sup>
North East	4	8	-4 (-4) <sup>1</sup>	0 (0) <sup>1</sup>	5 (5) <sup>1</sup>	-4 (-4) <sup>1</sup>	-9 (-9) <sup>1</sup>
North West	4	0	4 (5) <sup>1</sup>	1 (0) <sup>1</sup>	3 (5) <sup>1</sup>	3 (5) <sup>1</sup>	1 (0) <sup>1</sup>
Northern Ireland	2	3	-1 (0) <sup>1</sup>	3 (4) <sup>1</sup>	6 (8) <sup>1</sup>	-4 (-4) <sup>1</sup>	-7 (-8) <sup>1</sup>
Scotland	8	5	3 (6) <sup>1</sup>	5 (7) <sup>1</sup>	-1 (2) <sup>1</sup>	-2 (-1) <sup>1</sup>	4 (4) <sup>1</sup>
South East	4	5	-1 (2) <sup>1</sup>	7 (5) <sup>1</sup>	-3 (0) <sup>1</sup>	-8 (-3) <sup>1</sup>	2 (2) <sup>1</sup>
South West	5	1	4 (4) <sup>1</sup>	11 (12) <sup>1</sup>	8 (8) <sup>1</sup>	-7 (-8) <sup>1</sup>	-4 (-4) <sup>1</sup>
Wales	5	5	0 (-1) <sup>1</sup>	-9 (-7) <sup>1</sup>	8 (8) <sup>1</sup>	9 (6) <sup>1</sup>	-8 (-9) <sup>1</sup>
West Midlands	14	0	14 (13) <sup>1</sup>	8 (11) <sup>1</sup>	9 (9) <sup>1</sup>	6 (2) <sup>1</sup>	5 (4) <sup>1</sup>
Yorkshire & the Humber	4	4	0 (-1) <sup>1</sup>	10 (8) <sup>1</sup>	9 (8) <sup>1</sup>	-10 (-9) <sup>1</sup>	-9 (-9) <sup>1</sup>

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

# Sector Summary

Payroll gains are forecast for seven of the nine industry sectors during the first quarter of 2020. The strongest hiring prospects are reported in the Mining sector where the Net Employment Outlook is +5%, and in the Manufacturing sector with an Outlook of +4%. However, employers expect staffing levels to decline in two sectors, including the Transport & Communications sector where the Outlook is -4%.

In a comparison with the previous quarter, hiring intentions weaken in seven of the nine industry sectors, most notably by five percentage points in the Utilities sector and by four percentage points

in both the Finance & Business Services sector and the Hotels & Retail sector. Elsewhere, Outlooks improve in two sectors, including an increase of six percentage points for the Mining sector.

Hiring sentiment also weakens in seven of the nine industry sectors when compared with this time one year ago. Hiring prospects are seven percentage points weaker in four sectors - the Agriculture sector, the Construction sector, the Utilities sector and the Hotels & Retail sector. Meanwhile, slight improvements of two percentage points are reported for the Manufacturing sector and the Mining sector.

	Increase Q1 2020	Decrease Q1 2020	Q1 2020	Q4 2019	Q1 2019	Qtr on Qtr Change Q4 2019 to Q1 2020	Yr on Yr Change Q1 2019 to Q1 2020
	%	%	%	%	%	%	%
Agriculture	1	6	-5 (-1) <sup>1</sup>	-1 (0) <sup>1</sup>	3 (6) <sup>1</sup>	-4 (-1) <sup>1</sup>	-8 (-7) <sup>1</sup>
Community & Social	7	4	3 (1) <sup>1</sup>	2 (3) <sup>1</sup>	8 (6) <sup>1</sup>	1 (-2) <sup>1</sup>	-5 (-5) <sup>1</sup>
Construction	1	0	1 (3) <sup>1</sup>	6 (6) <sup>1</sup>	8 (10) <sup>1</sup>	-5 (-3) <sup>1</sup>	-7 (-7) <sup>1</sup>
Finance & Business Services	6	4	2 (2) <sup>1</sup>	8 (6) <sup>1</sup>	4 (4) <sup>1</sup>	-6 (-4) <sup>1</sup>	-2 (-2) <sup>1</sup>
Hotels & Retail	4	5	-1 (2) <sup>1</sup>	6 (6) <sup>1</sup>	6 (9) <sup>1</sup>	-7 (-4) <sup>1</sup>	-7 (-7) <sup>1</sup>
Manufacturing	5	2	3 (4) <sup>1</sup>	3 (3) <sup>1</sup>	1 (2) <sup>1</sup>	0 (1) <sup>1</sup>	2 (2) <sup>1</sup>
Mining	5	1	4 (5) <sup>1</sup>	-3 (-1) <sup>1</sup>	2 (3) <sup>1</sup>	7 (6) <sup>1</sup>	2 (2) <sup>1</sup>
Transport & Communications	2	6	-4 (-4) <sup>1</sup>	-3 (-2) <sup>1</sup>	-3 (-3) <sup>1</sup>	-1 (-2) <sup>1</sup>	-1 (-1) <sup>1</sup>
Utilities	3	3	0 (2) <sup>1</sup>	8 (7) <sup>1</sup>	7 (9) <sup>1</sup>	-8 (-5) <sup>1</sup>	-7 (-7) <sup>1</sup>

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

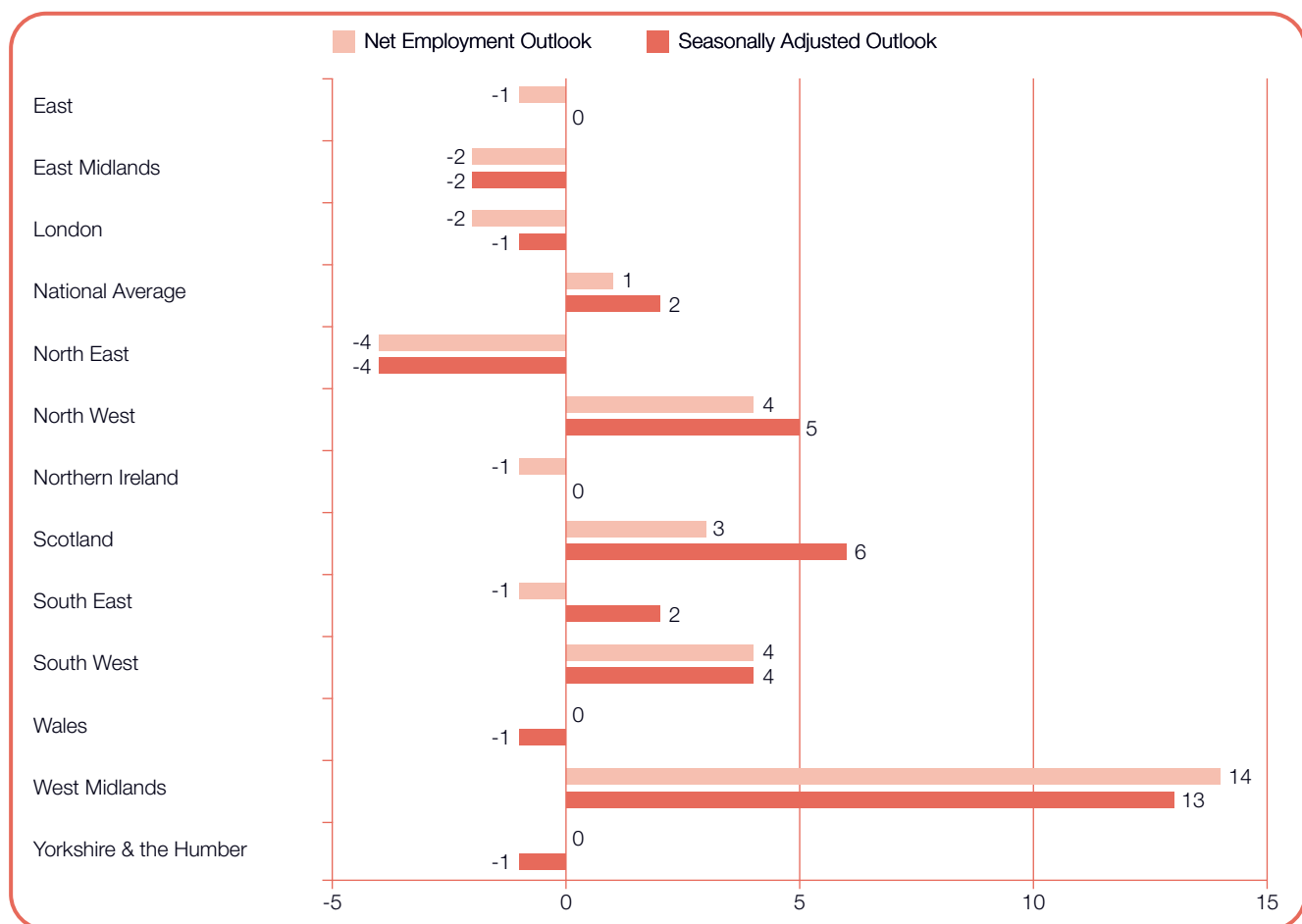
# Regional Comparisons

Workforce gains are expected in five of the 12 regions during the January to March time frame. Employers in the West Midlands forecast the strongest hiring pace, reporting a Net Employment Outlook of +13%. Some hiring opportunities are expected in Scotland, where the Outlook is +6%, while Outlooks of +5% and +4% are reported in the North West and the South West, respectively. Meanwhile, employers in five regions report negative hiring prospects, with the weakest labour markets anticipated in the North East, where the Outlook is -4%, and the East Midlands with an Outlook of -2%.

Employers report weaker hiring sentiment in nine of the 12 regions when compared with the final quarter of 2019. A considerable decrease of 15 percentage points is reported in the East Midlands, and the Outlook for Yorkshire & the Humber declines by nine percentage points. Elsewhere, the South West

Outlook is eight percentage points weaker, and decreases of five percentage points are reported in two regions - the East and London. However, hiring plans strengthen in three regions, most notably by six percentage points in Wales and by five percentage points in the North West.

Hiring prospects weaken in eight of the 12 regions when compared with the same period last year. Employers in the East Midlands report the most notable decrease of 12 percentage points, while the Outlook for the East is 11 percentage points weaker. Hiring intentions decline by nine percentage points in three regions - the North East, Yorkshire & the Humber and Wales - while employers in Northern Ireland report a decline of eight percentage points. Meanwhile, Outlooks strengthen in three regions, including increases of four percentage points reported in both the West Midlands and Scotland.



**-1 (0)%**

## East

Employers anticipate the weakest labour market in more than seven years during the forthcoming quarter. The Net Employment Outlook stands at 0, declining by five percentage points when compared with the previous quarter and by 11 percentage points in comparison with the same period last year.



**-2 (-2)%**

## East Midlands

The weakest hiring pace in 10 years is forecast for the first quarter of 2020, with employers reporting a Net Employment Outlook of -2%. Hiring plans are considerably weaker both quarter-over-quarter and year-over-year, declining by 15 and 12 percentage points, respectively.



**-2 (-1)%**

## London

With a Net Employment Outlook of -1%, employers report uncertain hiring prospects for the next three months. The Outlook is the weakest - and first negative - forecast in nine years, declining by five percentage points in comparison with both the prior quarter and this time one year ago.

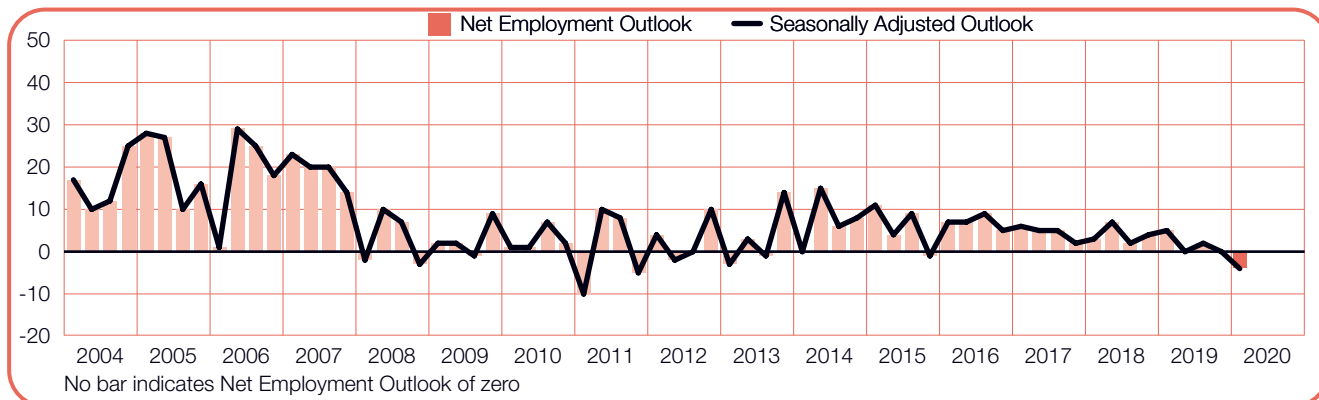




**-4 (-4)%**

## North East

Job seekers can expect the weakest hiring pace in eight years during the January to March period, according to employers who report a Net Employment Outlook of -4%. The Outlook is four percentage points weaker when compared with the previous quarter and declines by nine percentage points in comparison with Quarter 1 2019.



**+4 (+5)%**

## North West

Modest payroll gains are forecast for the first quarter of 2020, with employers reporting a Net Employment Outlook of +5%. Hiring intentions improve by five percentage points quarter-over-quarter and are unchanged in a comparison with last year at this time.



**-1 (0)%**

## Northern Ireland

Reporting a Net Employment Outlook of 0, employers forecast flat hiring activity in the forthcoming quarter. The Outlook declines by four percentage points when compared with the previous quarter and is eight percentage points weaker in comparison with the same period last year.



**+3 (+6)%**

## Scotland

The moderate hiring pace is expected to continue in the next three months, with employers reporting a Net Employment Outlook of +6%. Hiring prospects remain relatively stable quarter-over-quarter, and improve by four percentage points when compared with this time one year ago.



**-1 (+2)%**

## South East

Employers anticipate a soft labour market in the upcoming quarter, reporting a Net Employment Outlook of +2%. Hiring prospects are three percentage points weaker when compared with the previous quarter, but improve by two percentage points year-over-year.



**+4 (+4)%**

## South West

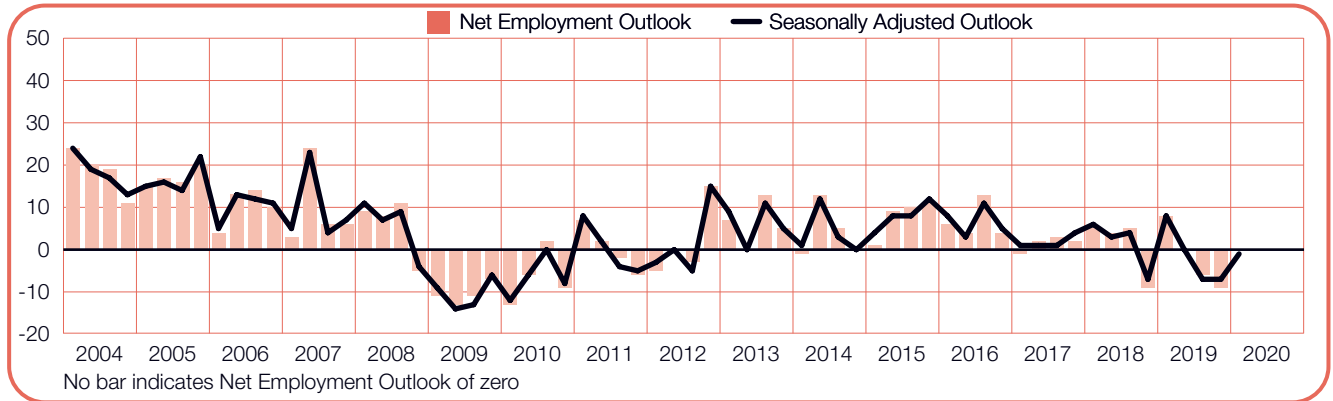
Job seekers can expect limited hiring opportunities in the next three months, according to employers who report a Net Employment Outlook of +4%. Hiring plans decline by eight percentage points in comparison with Quarter 4 2019 and are four percentage points weaker when compared with this time one year ago.



0 (-1)%

## Wales

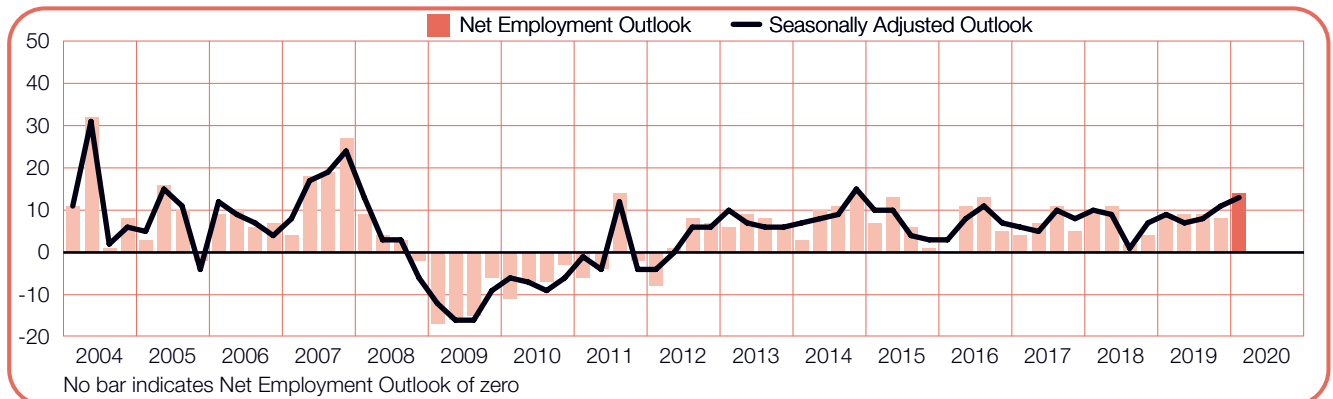
Employers expect the labour market slump to continue in Quarter 1 2020, reporting a third consecutive negative Net Employment Outlook, standing at -1%. While the Outlook is six percentage points stronger in comparison with the previous quarter, employers report a year-over-year decline of nine percentage points.



+14 (+13)%

## West Midlands

The strongest hiring pace in five years is anticipated during the first quarter of 2020. Employers report a favourable Net Employment Outlook of +13%, improving by two and four percentage points quarter-over-quarter and year-over-year, respectively.



0 (-1)%

## Yorkshire & the Humber

A subdued hiring climate is forecast for the January to March time frame, with employers reporting the weakest Net Employment Outlook in three years, standing at -1%. Hiring plans are nine percentage points weaker in comparison with both the prior quarter and last year at this time.



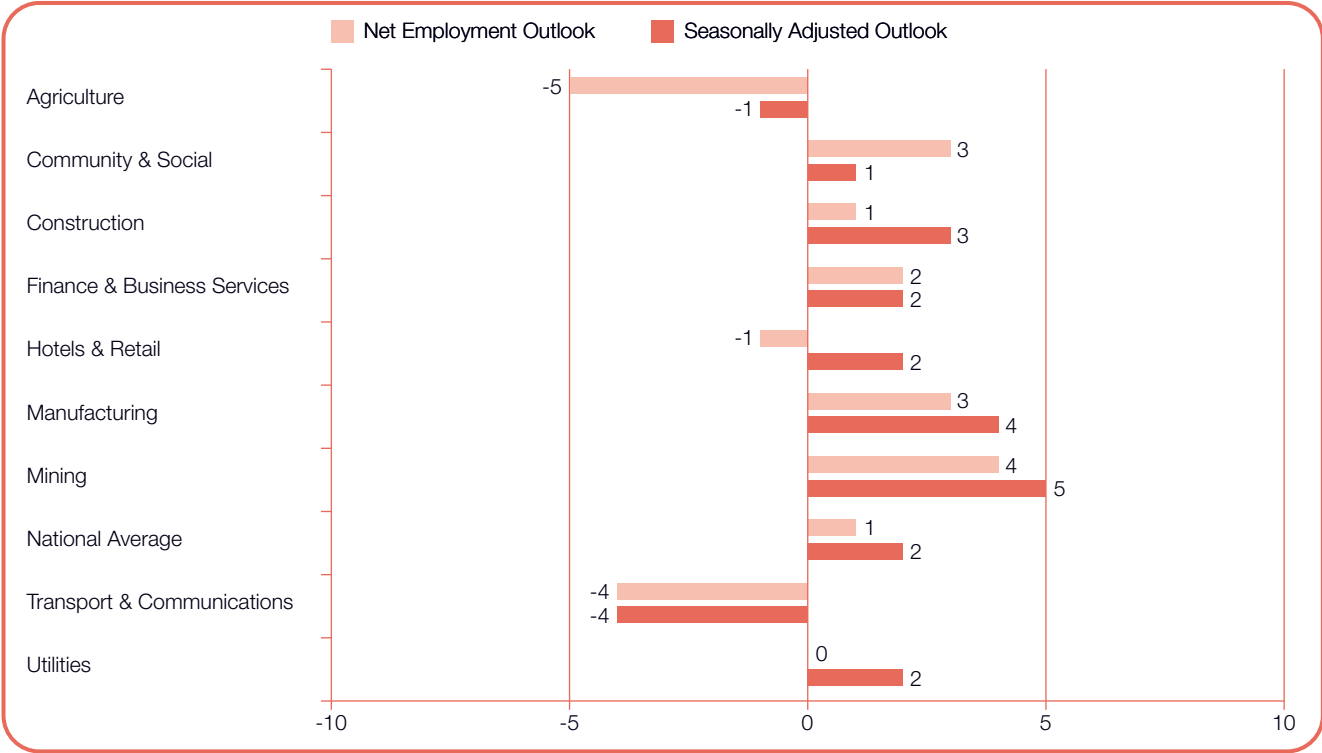
# Sector Comparisons

Employers in seven of the nine industry sectors expect to add to payrolls during the next three months. Hiring sentiment is strongest in the Mining sector, where employers report a Net Employment Outlook of +5%. Elsewhere, Outlooks stand at +4% in the Manufacturing sector and +3% in the Construction sector, while slow-paced hiring plans are reflected in Outlooks of +2% for the Utilities sector, the Finance & Business Services sector and the Hotels & Retail sector. Meanwhile, Transport & Communications sector employers report muted hiring prospects with an Outlook of -4%, while the Outlook for the Agriculture sector is -1%.

Hiring intentions weaken in seven of the nine industry sectors when compared with the previous quarter. Utilities sector employers report the most noteworthy decrease of five percentage points. Elsewhere,

Outlooks are four percentage points weaker in both the Finance & Business Services sector and the Hotels & Retail sector, while Construction sector employers report a decline of three percentage points. However, the Mining sector Outlook improves by six percentage points and Manufacturing sector employers report relatively stable hiring plans.

When compared with the same period last year, employers also report weaker hiring prospects in seven of the nine industry sectors. Noteworthy declines of seven percentage points are reported in the Agriculture sector, the Construction sector, the Utilities sector and the Hotels & Retail sector, while Community & Social sector employers report a decrease of five percentage points. However, Outlooks are two percentage points stronger in both the Manufacturing sector and the Mining sector.



**-5 (-1)%**

## Agriculture

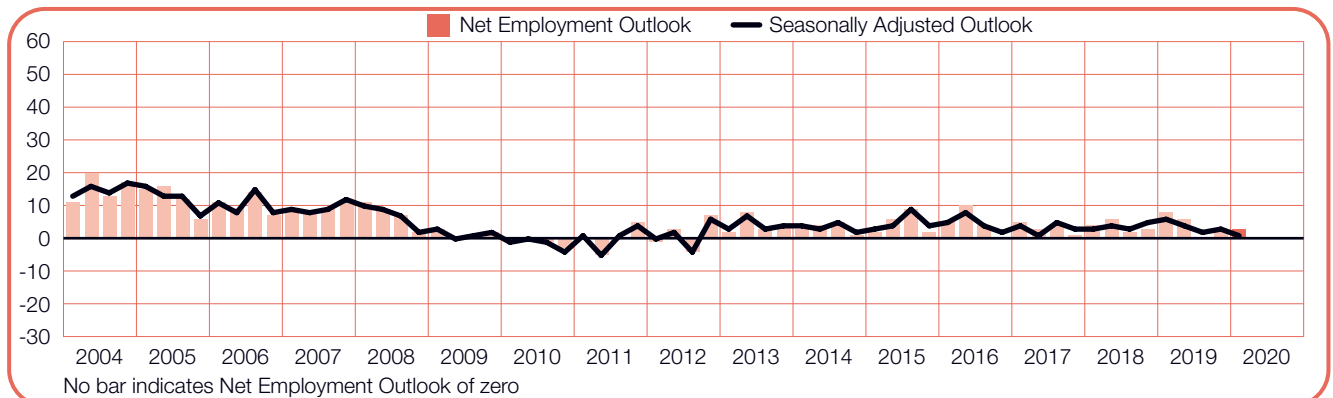
Job seekers can expect a subdued hiring climate in the next three months, according to employers who report a Net Employment Outlook of -1%. The Outlook is the weakest reported in more than two years, remaining relatively stable quarter-over-quarter, but declining by seven percentage points in comparison with this time one year ago.



**+3 (+1)%**

## Community & Social

The weakest hiring pace in more than two years is anticipated in the January to March time frame. Employers report a cautious Net Employment Outlook of +1%, declining by two percentage points when compared with the previous quarter and by five percentage points in comparison with Quarter 1 2019.



**+1 (+3)%**

## Construction

With a Net Employment Outlook of +3%, employers anticipate slow-paced workforce gains during the first quarter of 2020. However, hiring prospects are three percentage points weaker when compared with the previous quarter and decline by seven percentage points year-over-year.



**+2 (+2)%**

## Finance & Business Services

Employers forecast a soft hiring pace in the next three months, reporting a Net Employment Outlook of +2%. Hiring prospects decline by four percentage points when compared with the previous quarter and are two percentage points weaker in comparison with Quarter 1 2019.

Finance sub-sector employers report modest hiring intentions for the coming quarter with a Net Employment Outlook of +5%. Hiring plans improve by three percentage points quarter-over-quarter, but are two percentage points weaker when compared with this time one year ago.

Employers in the Business Services sub-sector report limited hiring opportunities with a Net Employment Outlook of +2% for the January to March period. Hiring intentions decrease by four percentage points in comparison with the prior quarter and are two percentage points weaker when compared with last year at this time.



**-1 (+2)%**

## Hotels & Retail

Job seekers can expect the weakest hiring climate in three years during the first quarter of 2020, according to employers who report a Net Employment Outlook of +2%. Hiring plans are four percentage points weaker quarter-over-quarter and decline by seven percentage points when compared with this time one year ago.

B2B sub-sector employers report subdued hiring sentiment with a Net Employment Outlook of 0 for the January to March time frame. The Outlook declines by two percentage points when compared with the previous quarter, while remaining relatively stable in comparison with the same period last year.

In the B2C sub-sector, employers report soft hiring prospects for the next three months with a Net Employment Outlook of +2%. Hiring intentions decline both quarter-over-quarter and year-over-year, decreasing by four and 10 percentage points, respectively.

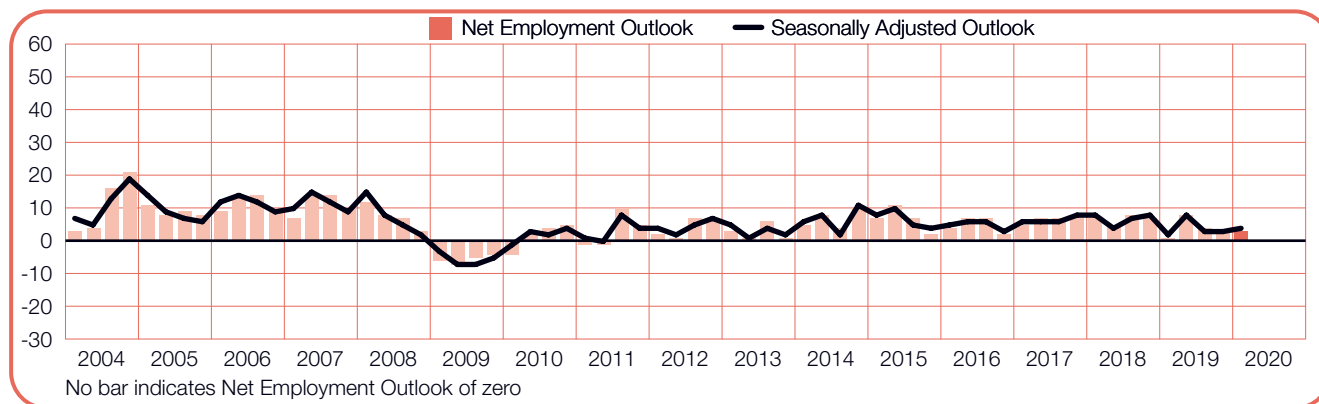
With a Net Employment Outlook of +1%, employers in the Hotels & Restaurants sub-sector forecast the weakest hiring pace in more than two years. Hiring plans are nine percentage points weaker when compared with the previous quarter, and decline by 15 percentage points in comparison with last year at this time.



**+3 (+4)%**

## Manufacturing

Limited payroll gains are forecast for the first quarter of 2020, with employers reporting a Net Employment Outlook of +4%. The Outlook remains relatively stable in comparison with the prior quarter and improves by two percentage points year-over-year.



**+4 (+5)%**

## Mining

Job seekers can expect some hiring opportunities in the forthcoming quarter, according to employers who report a Net Employment Outlook of +5%. Hiring plans improve by six percentage points quarter-over-quarter and are two percentage points stronger in comparison with last year at this time.



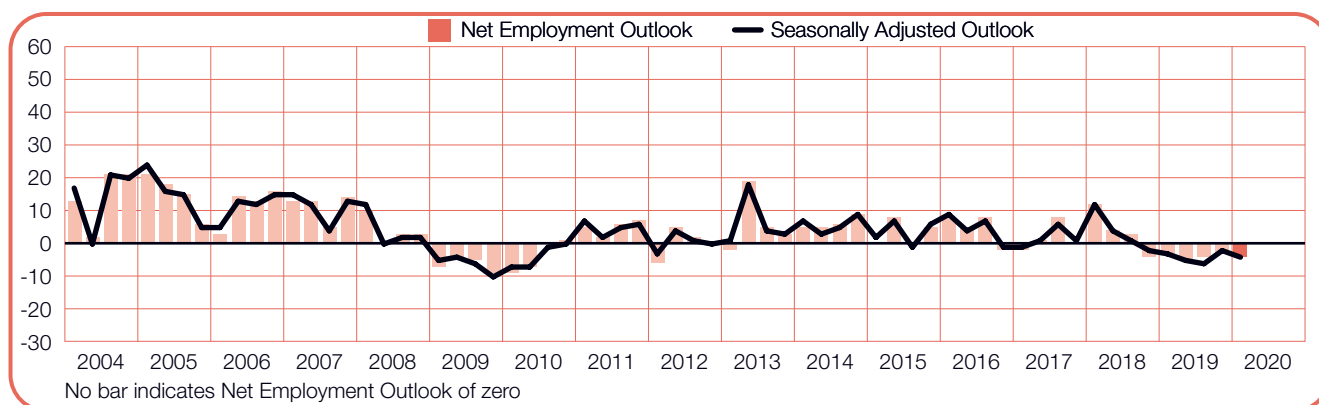
**-4 (-4)%**

## Transport & Communications

Employers expect the labour market slump to continue in the upcoming quarter, reporting a sixth consecutive negative Net Employment Outlook, standing at -4%. Hiring intentions decline by two percentage points when compared with the previous quarter, while remaining relatively stable in comparison with Quarter 1 2019.

Transport sub-sector employers forecast a sluggish hiring pace in Quarter 1 2020, reporting a Net Employment Outlook of -6%. The Outlook declines by five and two percentage points quarter-over-quarter and year-over-year, respectively.

With a Net Employment Outlook of 0, Telecomms sub-sector employers anticipate flat hiring activity in the next three months. Hiring prospects remain relatively stable when compared with the previous quarter and are three percentage points stronger in comparison with the same period last year.



**0 (+2)%**

## Utilities

The weakest labour market in 14 years is expected in the January to March time frame. Employers report a Net Employment Outlook of +2%, declining by five percentage points quarter-over-quarter and by seven percentage points in comparison with the same period last year.





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# Global Employment Outlook

ManpowerGroup interviewed over 58,000 employers in 43 countries and territories to forecast labour market activity\* in the first quarter of 2020. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of March 2020 as compared to the current quarter?”

In the ManpowerGroup research for the first quarter of 2020, employers in 42 of 43 countries and territories surveyed expect to grow payrolls in the period up to the end of March 2020.

When compared with the previous quarter, hiring plans strengthen in 15 of the 43 countries and territories, while employers in 23 report weaker hiring prospects, with no change reported in five. In a comparison with last year at this time, employers in 12 countries and territories report stronger hiring sentiments, while hiring intentions weaken in 26 and are unchanged in five. The strongest labour markets are anticipated in Greece, Japan, Taiwan, the U.S. and Romania, while the weakest hiring activity is expected in Panama, Argentina, Costa Rica, Italy and Spain.

Payroll gains are anticipated in all 26 Europe, Middle East & Africa (EMEA) region countries surveyed during the first quarter of 2020. In a comparison with the final quarter of 2019, hiring plans strengthen in 10 countries, but weaken in 12. When compared with this time one year ago, Outlooks improve in eight countries, but decline in 13. Employers in Greece and Romania anticipate the strongest hiring pace during the next three months, while the weakest labour markets are forecast in Italy and Spain.

Employers in all seven Asia Pacific countries and territories expect to increase headcounts during the upcoming quarter. When compared with the prior quarter, hiring plans strengthen in three countries and territories, but weaken in three. In a comparison with the same period last year, hiring prospects weaken in six countries and territories, while improving in one. The strongest hiring sentiment in the region is reported by employers in Japan and Taiwan, while the most cautious Outlook is reported in China.

In the Americas, employers in nine of the 10 countries surveyed expect to increase payrolls during the next three months, while employers in Panama report uncertain hiring plans and the only negative forecast globally. In a comparison with the final quarter of 2019, hiring intentions improve in two Americas countries, but decline in eight. When compared with this time one year ago, employers in three countries report stronger hiring prospects, while Outlooks weaken in seven. The region's strongest labour markets are anticipated in the U.S. and Colombia, while the weakest hiring sentiment is reported in Panama.

Full survey results for each of the 43 countries and territories included in this quarter's survey, plus regional and global comparisons, can be found at

[www.manpowergroup.com/meos](http://www.manpowergroup.com/meos)

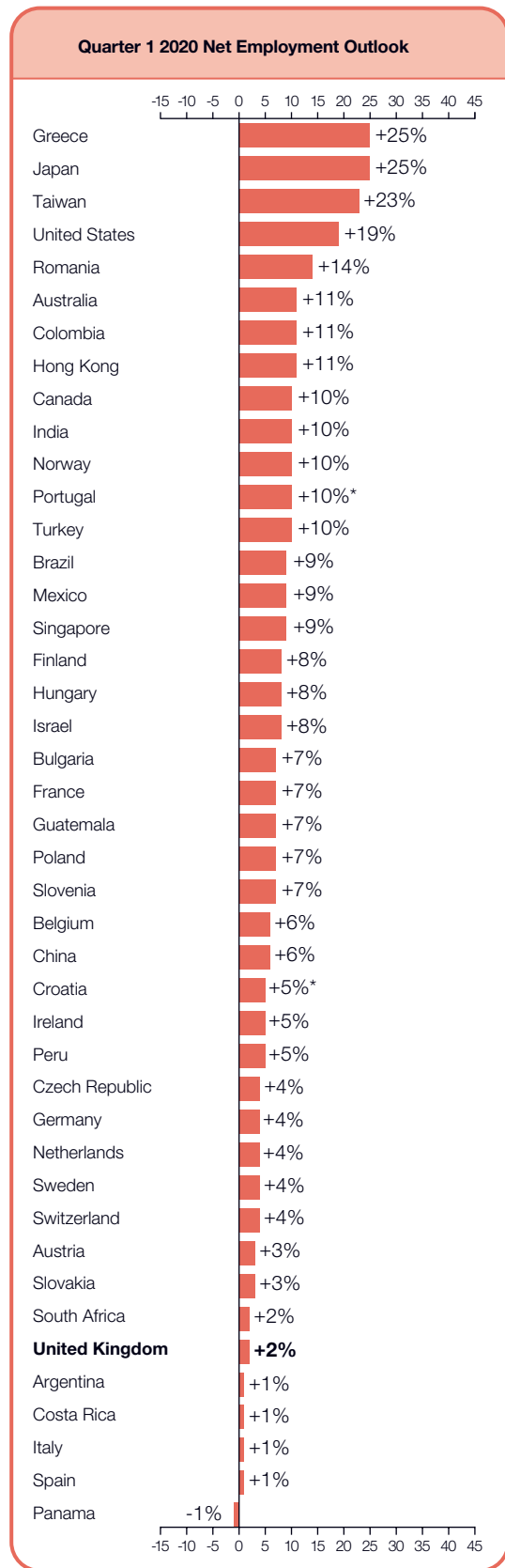
The next ManpowerGroup Employment Outlook Survey will be released on 10 March 2020 and will detail expected labour market activity for the second quarter of 2020.

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

	Quarter 1 2020	Qtr on Qtr Change Q4 2019 to Q1 2020	Yr on Yr Change Q1 2019 to Q1 2020
	%		
<b>Americas</b>			
Argentina	1 (1) <sup>1</sup>	-1 (-1) <sup>1</sup>	4 (5) <sup>1</sup>
Brazil	9 (9) <sup>1</sup>	1 (-1) <sup>1</sup>	2 (2) <sup>1</sup>
Canada	6 (10) <sup>1</sup>	-3 (-2) <sup>1</sup>	-2 (-2) <sup>1</sup>
Colombia	10 (11) <sup>1</sup>	1 (2) <sup>1</sup>	3 (2) <sup>1</sup>
Costa Rica	3 (1) <sup>1</sup>	1 (-1) <sup>1</sup>	-3 (-3) <sup>1</sup>
Guatemala	7 (7) <sup>1</sup>	-3 (-1) <sup>1</sup>	-3 (-3) <sup>1</sup>
Mexico	8 (9) <sup>1</sup>	0 (1) <sup>1</sup>	-4 (-4) <sup>1</sup>
Panama	0 (-1) <sup>1</sup>	-5 (-5) <sup>1</sup>	-4 (-4) <sup>1</sup>
Peru	5 (5) <sup>1</sup>	-2 (-4) <sup>1</sup>	-2 (-2) <sup>1</sup>
United States	17 (19) <sup>1</sup>	0 (-1) <sup>1</sup>	-1 (-1) <sup>1</sup>

<b>Asia Pacific</b>			
Australia	12 (11) <sup>1</sup>	0 (0) <sup>1</sup>	-2 (-2) <sup>1</sup>
China	7 (6) <sup>1</sup>	3 (2) <sup>1</sup>	-3 (-3) <sup>1</sup>
Hong Kong	11 (11) <sup>1</sup>	-3 (-3) <sup>1</sup>	-7 (-7) <sup>1</sup>
India	10 (10) <sup>1</sup>	-10 (-10) <sup>1</sup>	-2 (-2) <sup>1</sup>
Japan	24 (25) <sup>1</sup>	1 (-1) <sup>1</sup>	-2 (-2) <sup>1</sup>
Singapore	8 (9) <sup>1</sup>	3 (5) <sup>1</sup>	-1 (-1) <sup>1</sup>
Taiwan	21 (23) <sup>1</sup>	1 (1) <sup>1</sup>	3 (2) <sup>1</sup>

<b>EMEA<sup>†</sup></b>			
Austria	-1 (3) <sup>1</sup>	-5 (-2) <sup>1</sup>	-3 (-2) <sup>1</sup>
Belgium	5 (6) <sup>1</sup>	-1 (0) <sup>1</sup>	0 (0) <sup>1</sup>
Bulgaria	4 (7) <sup>1</sup>	-2 (0) <sup>1</sup>	0 (0) <sup>1</sup>
Croatia	5	-2	-9
Czech Republic	2 (4) <sup>1</sup>	0 (2) <sup>1</sup>	0 (0) <sup>1</sup>
Finland	3 (8) <sup>1</sup>	2 (4) <sup>1</sup>	4 (4) <sup>1</sup>
France	6 (7) <sup>1</sup>	0 (1) <sup>1</sup>	3 (3) <sup>1</sup>
Germany	0 (4) <sup>1</sup>	-8 (-2) <sup>1</sup>	-5 (-5) <sup>1</sup>
Greece	19 (25) <sup>1</sup>	7 (7) <sup>1</sup>	7 (7) <sup>1</sup>
Hungary	4 (8) <sup>1</sup>	-2 (1) <sup>1</sup>	-8 (-7) <sup>1</sup>
Ireland	2 (5) <sup>1</sup>	-4 (-1) <sup>1</sup>	-3 (-3) <sup>1</sup>
Israel	6 (8) <sup>1</sup>	1 (2) <sup>1</sup>	1 (1) <sup>1</sup>
Italy	0 (1) <sup>1</sup>	-3 (-3) <sup>1</sup>	-2 (-2) <sup>1</sup>
Netherlands	3 (4) <sup>1</sup>	-2 (-1) <sup>1</sup>	0 (0) <sup>1</sup>
Norway	9 (10) <sup>1</sup>	0 (0) <sup>1</sup>	5 (5) <sup>1</sup>
Poland	3 (7) <sup>1</sup>	-5 (-2) <sup>1</sup>	-5 (-5) <sup>1</sup>
Portugal	10	0	1
Romania	11 (14) <sup>1</sup>	8 (4) <sup>1</sup>	1 (0) <sup>1</sup>
Slovakia	0 (3) <sup>1</sup>	-3 (-2) <sup>1</sup>	-8 (-7) <sup>1</sup>
Slovenia	6 (7) <sup>1</sup>	-10 (-8) <sup>1</sup>	-13 (-13) <sup>1</sup>
South Africa	2 (2) <sup>1</sup>	-2 (-1) <sup>1</sup>	-3 (-3) <sup>1</sup>
Spain	1 (1) <sup>1</sup>	2 (1) <sup>1</sup>	-1 (-2) <sup>1</sup>
Sweden	2 (4) <sup>1</sup>	-7 (-5) <sup>1</sup>	-3 (-3) <sup>1</sup>
Switzerland	2 (4) <sup>1</sup>	0 (1) <sup>1</sup>	2 (2) <sup>1</sup>
Turkey	5 (10) <sup>1</sup>	3 (4) <sup>1</sup>	9 (9) <sup>1</sup>
<b>UK</b>	<b>1 (2)<sup>1</sup></b>	<b>-4 (-3)<sup>1</sup></b>	<b>-5 (-5)<sup>1</sup></b>



<sup>†</sup>EMEA – Europe, Middle East and Africa.

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.

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# International Comparisons – EMEA

In the Europe, Middle East and Africa (EMEA) region more than 21,000 employers were surveyed by ManpowerGroup for the first quarter of 2020. Employers in all 26 countries across the region expect to grow payrolls during the next three months.

Employers in Europe's four largest economies report variable hiring expectations for the forthcoming quarter. In France, employers report the strongest hiring sentiment in 12 years, expecting to grow payrolls in nine of 10 sectors, most particularly the Restaurants & Hotels sector, where hiring plans are the strongest since the survey began 16 years ago. By contrast, the weakest labour market in three years is forecast for Germany in the upcoming quarter. Manufacturing sector employers in Germany report their weakest hiring plans in more than three years, while Outlooks are the weakest in 10 and 6 years for the Finance, Insurance, Real Estate & Business Services and Transport, Storage & Communications sectors, respectively.

Overshadowed by Brexit uncertainty, the weakest labour market in seven years is anticipated by employers in the UK, with hiring sentiment softening in seven of nine industry sectors both quarter-over-quarter and year-over-year, although hiring plans remain stronger than the national Outlook in both the Mining and Manufacturing sectors. In Italy, employers report subdued hiring plans for the coming quarter, declining slightly in comparison with both the previous quarter and last year at this time. The weak Outlook is in part driven by regional differences - South/Islands employers report their weakest forecast in more than five years, while hiring plans are the strongest in nine years for the North West.

Elsewhere in Western Europe, employers in the Netherlands continue to anticipate slow-paced workforce gains, with expectations remaining relatively stable quarter-over-quarter and unchanged in comparison

with this time last year. In Belgium, employers continue to report a conservative hiring pace, with an unchanged Outlook in comparison with the previous quarter and this time one year ago. Construction sector employers in Belgium anticipate the strongest labour market, strengthening considerably in comparison with the prior quarter.

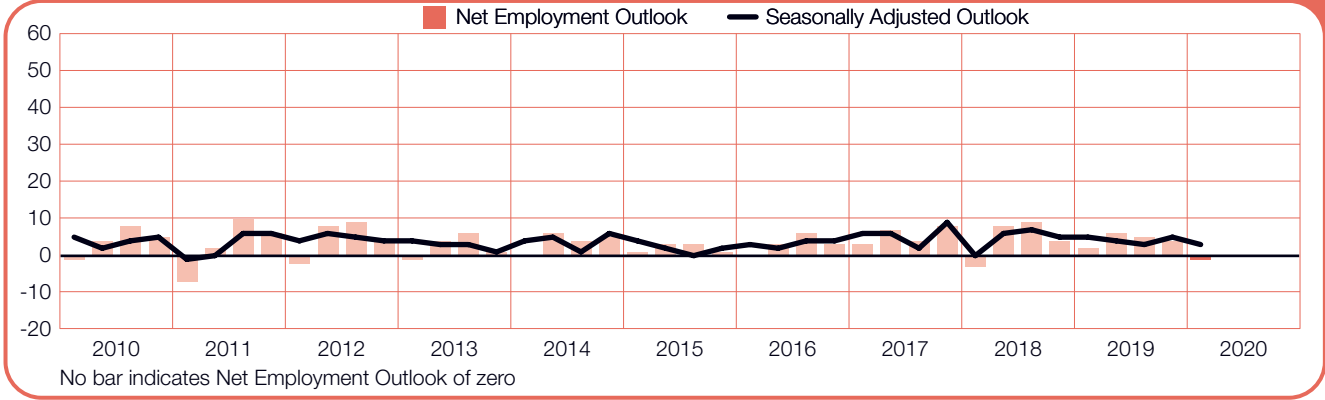
Nordic region employers report mixed hiring prospects for the upcoming quarter. In Norway, employers continue to report cautiously optimistic hiring plans, unchanged in comparison with Quarter 4 2019 and moderately stronger year-over-year. Positive hiring sentiment is fuelled by the strongest Manufacturing sector Outlook in eight years and upbeat hiring intentions in the Mining & Quarrying sector. Meanwhile, employers in Sweden report soft hiring prospects for the next three months, weakening in comparison with the previous quarter and last year at this time. Finance, Insurance, Real Estate & Business Services sector report the strongest of Sweden's sector Outlooks.

In Eastern Europe, employers in Poland expect the moderate hiring pace to continue in the next three months, although the Outlook is the weakest in two years. Hiring prospects weaken in seven of 10 industry sectors when compared with the previous quarter and decline in eight when compared with this time one year ago, while Construction sector employers report an uptick in the hiring pace. After cooling off slightly in the final quarter of 2019, hiring prospects for Romania strengthen for the coming quarter, most notably with healthy hiring plans for the Finance, Insurance, Real Estate & Business Services and Construction sectors.

In Greece, employers report their strongest hiring intentions since the survey began in 2008. The Greek Outlook for Quarter 1 2020 is the strongest in the EMEA region, fuelled in part by robust hiring intentions in the Wholesale & Retail Trade sector.

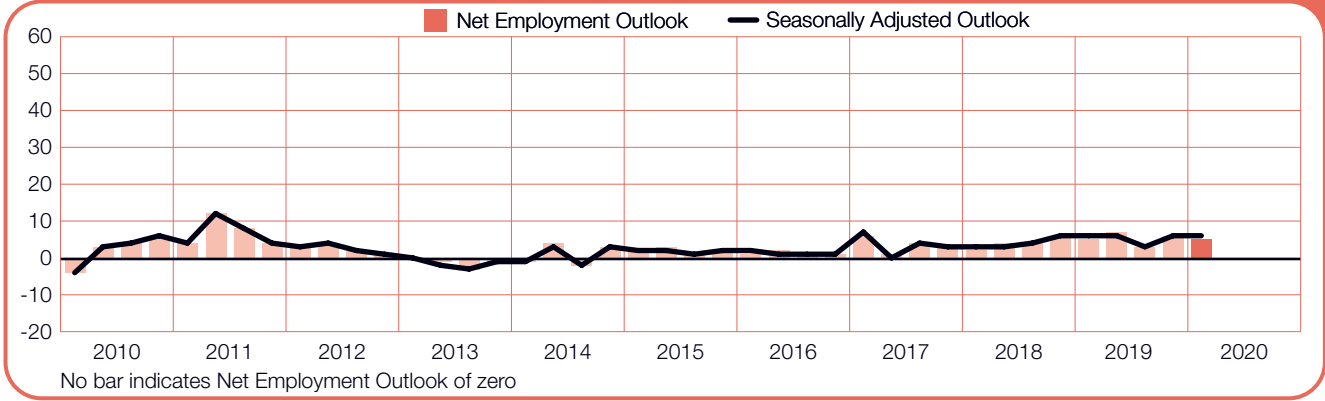
Austria

-1 (+3)%



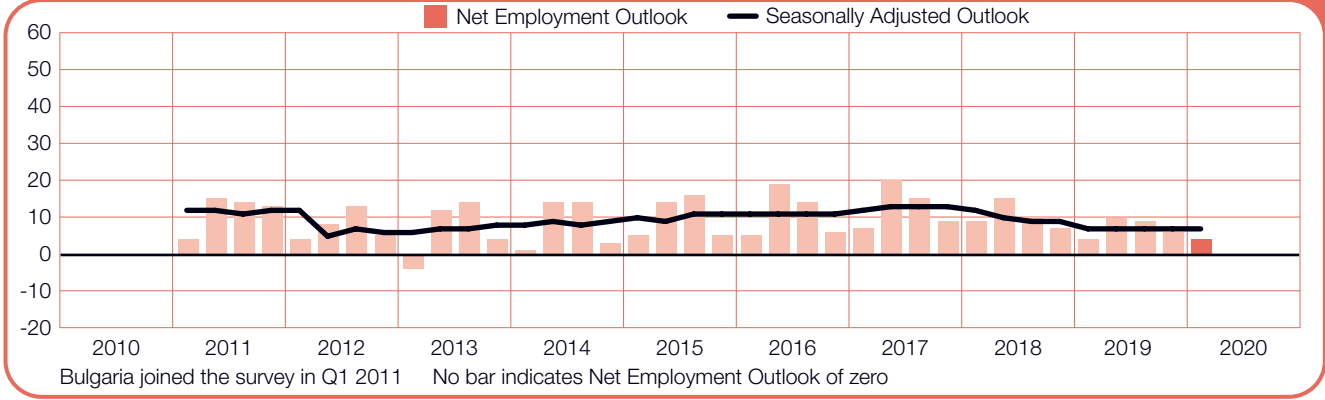
Belgium

+5 (+6)%



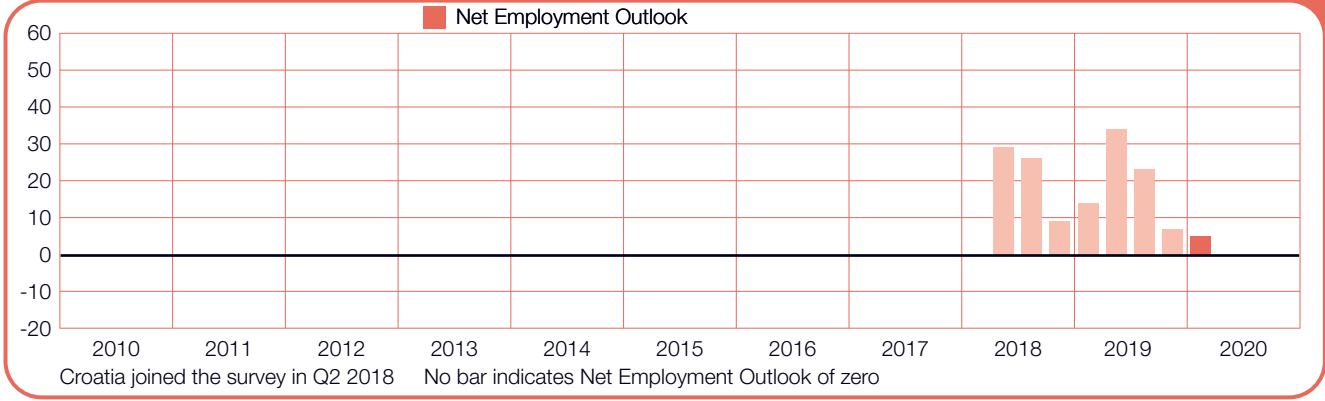
Bulgaria

+4 (+7)%



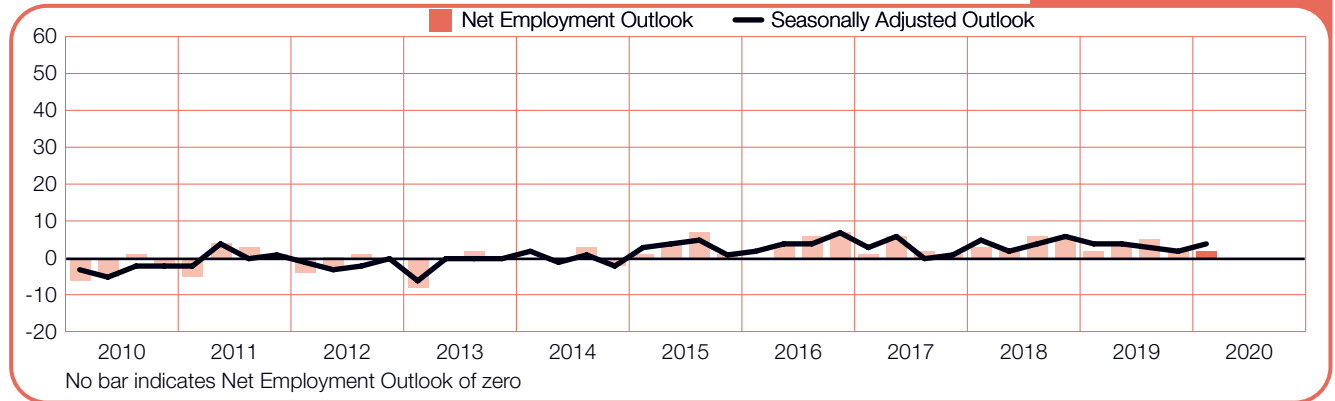
Croatia

+5%



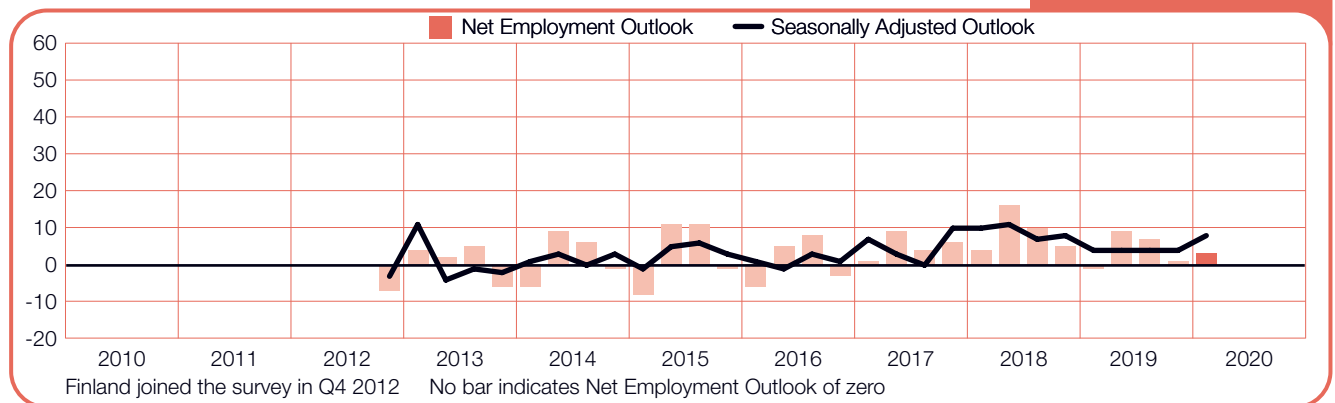
## Czech Republic

**+2 (+4)%**



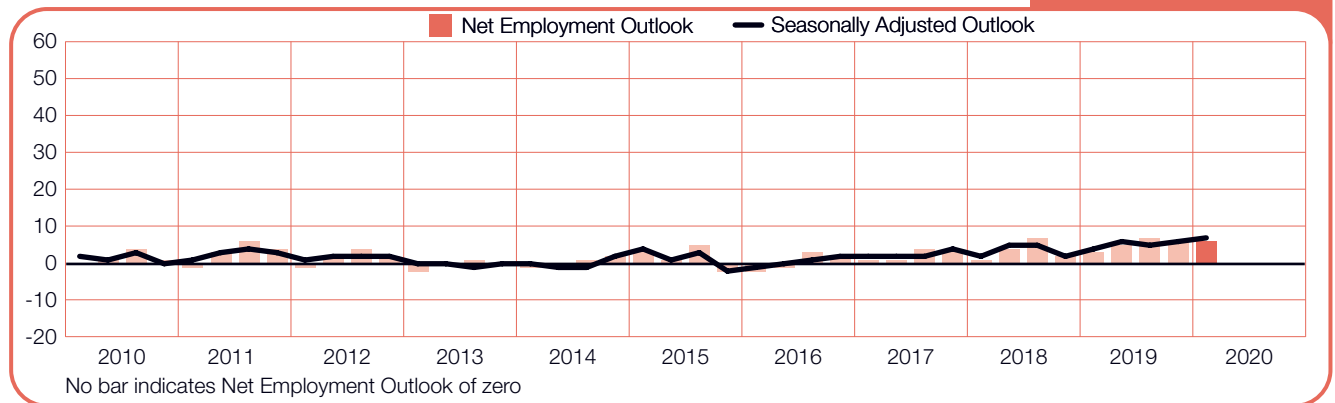
## Finland

**+3 (+8)%**



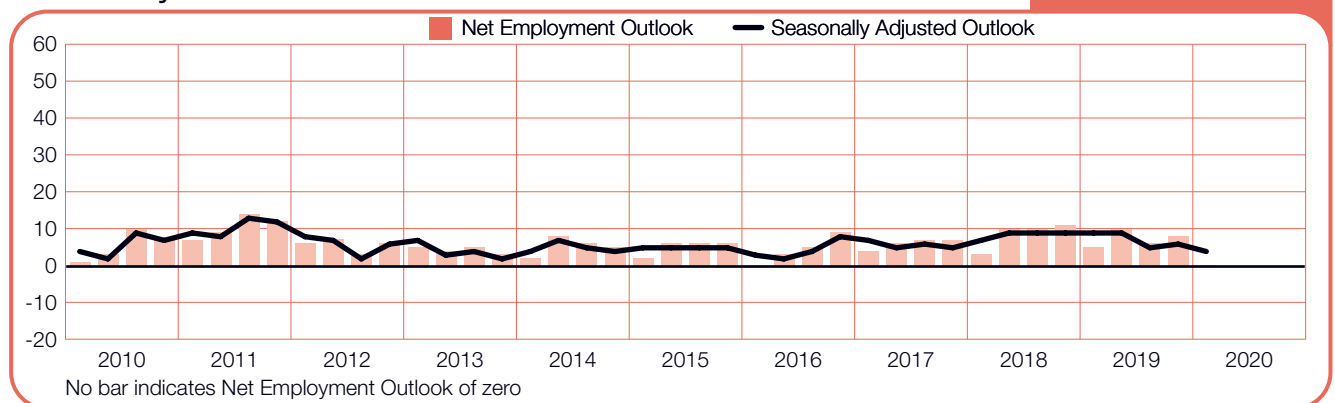
## France

**+6 (+7)%**



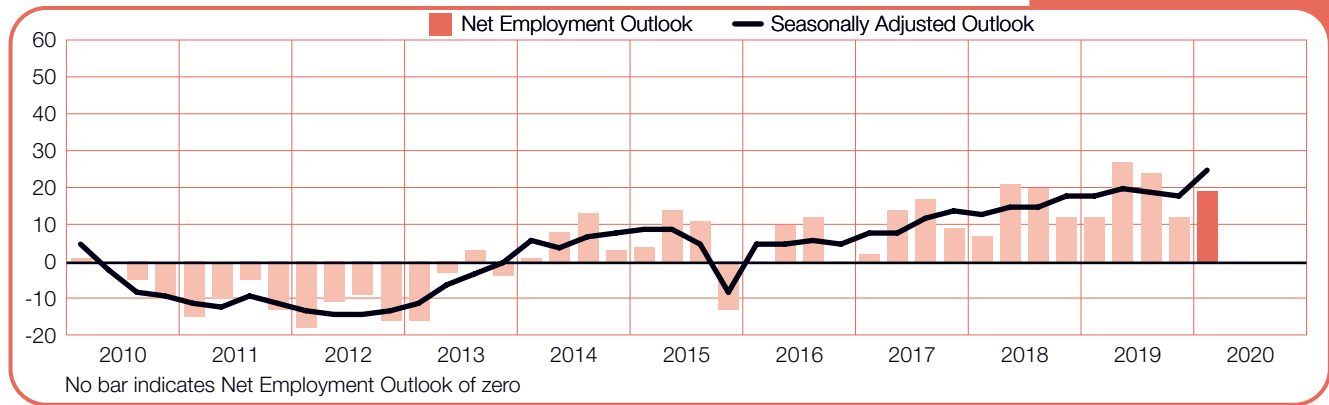
## Germany

**0 (+4)%**



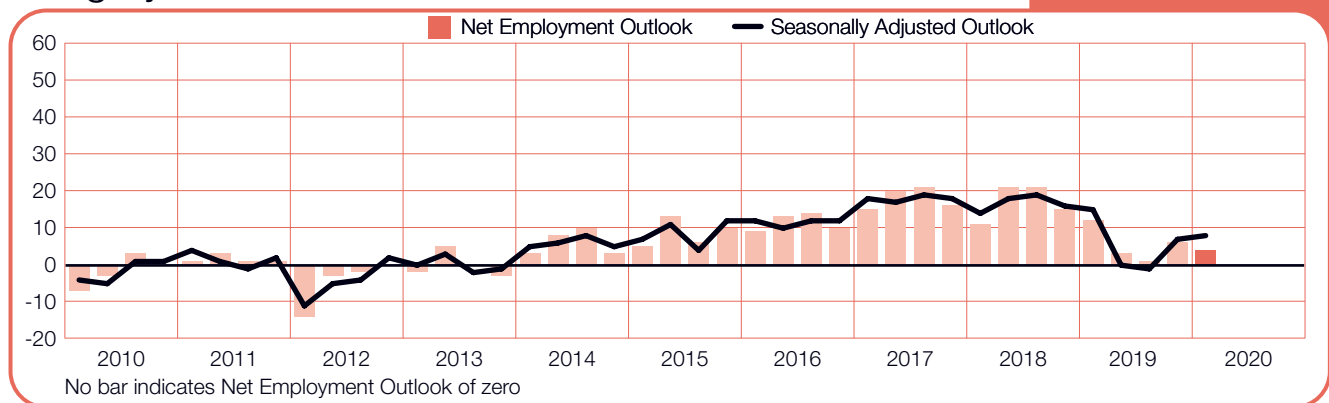
## Greece

**+19 (+25)%**



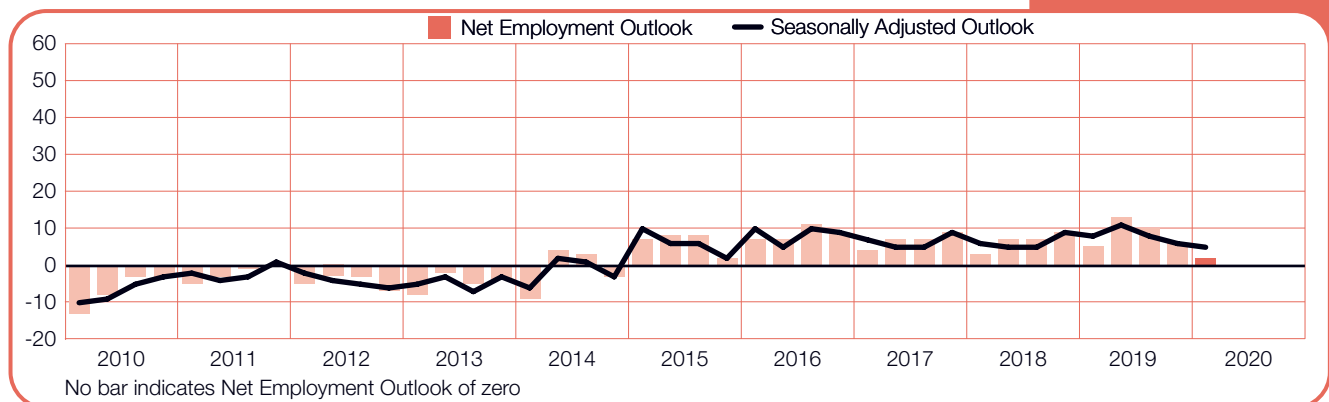
## Hungary

**+4 (+8)%**



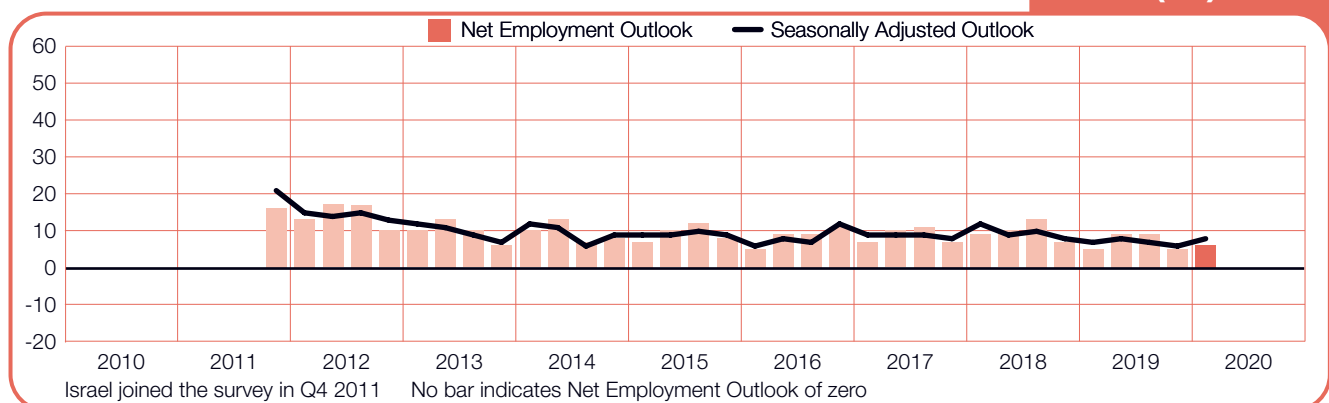
## Ireland

**+2 (+5)%**



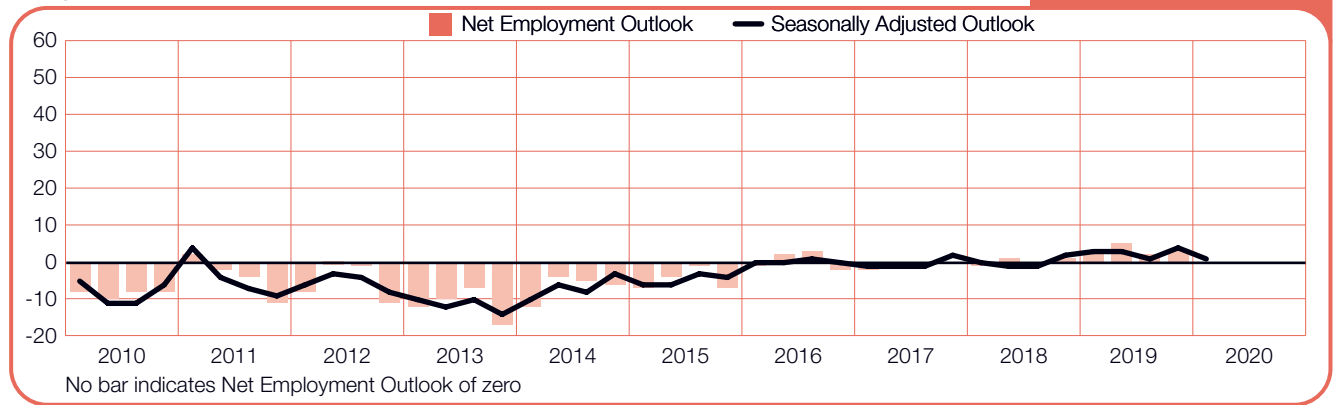
## Israel

**+6 (+8)%**



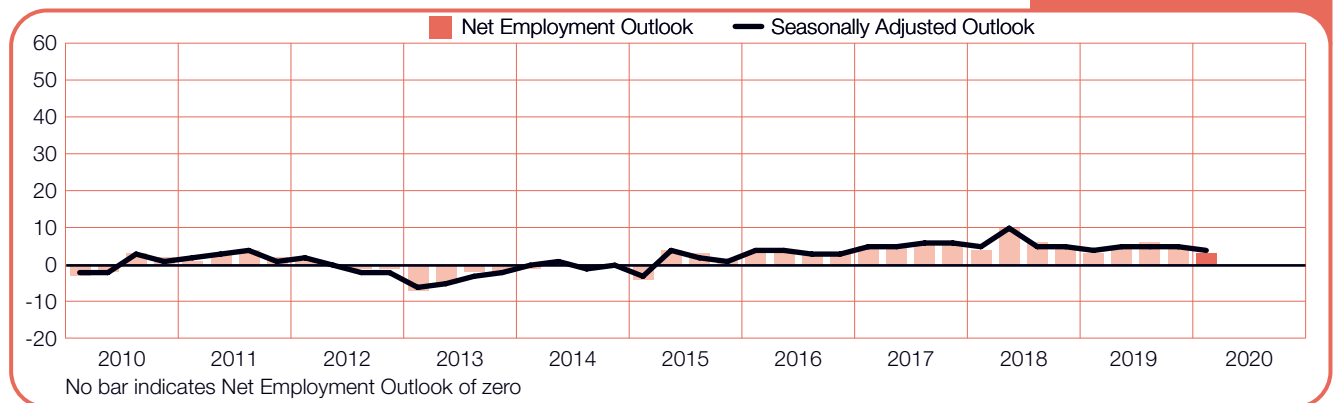
## Italy

0 (+1)%



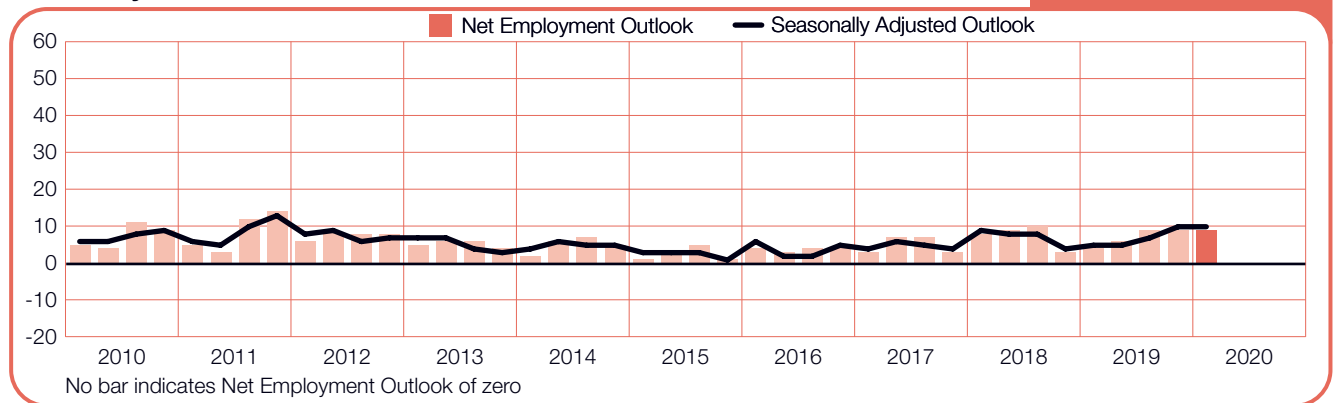
## Netherlands

+3 (+4)%



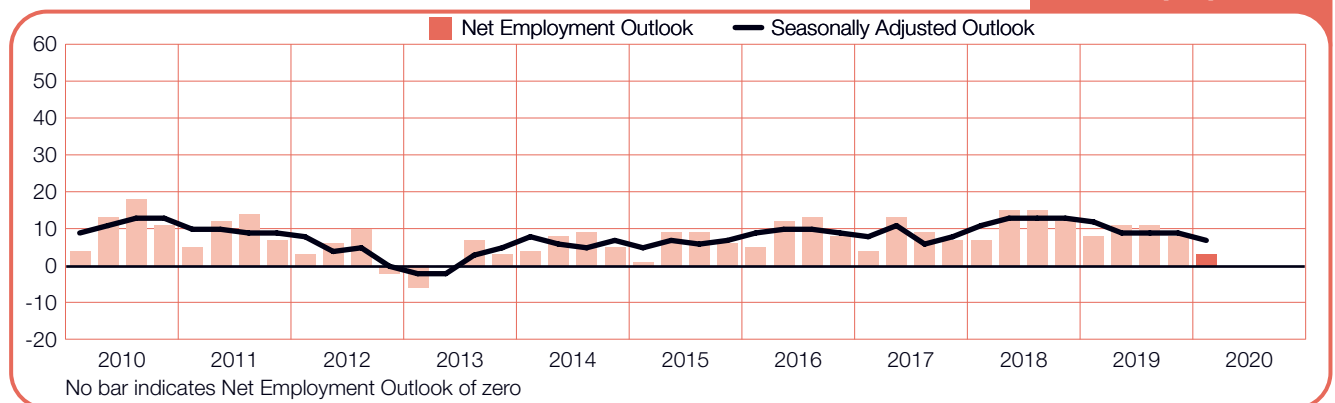
## Norway

+9 (+10)%



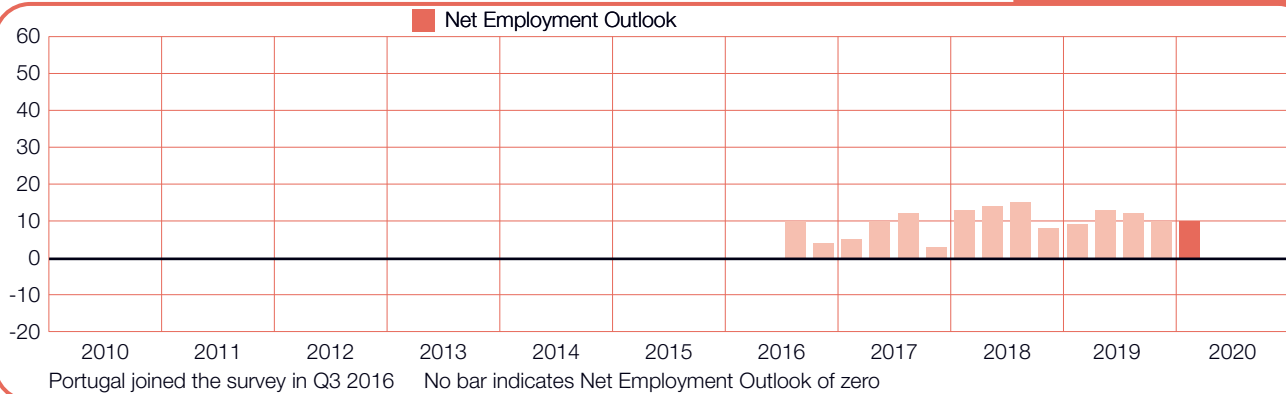
## Poland

+3 (+7)%



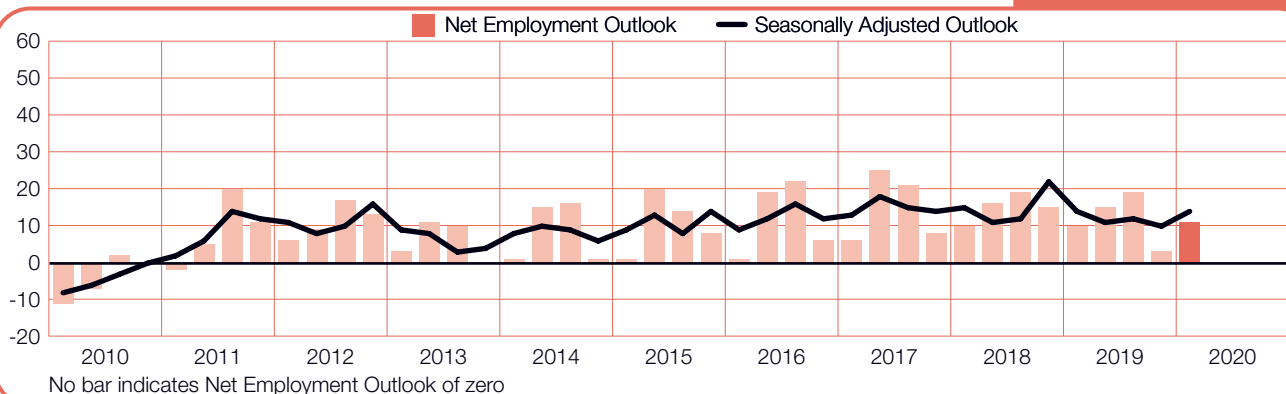
## Portugal

**+10%**



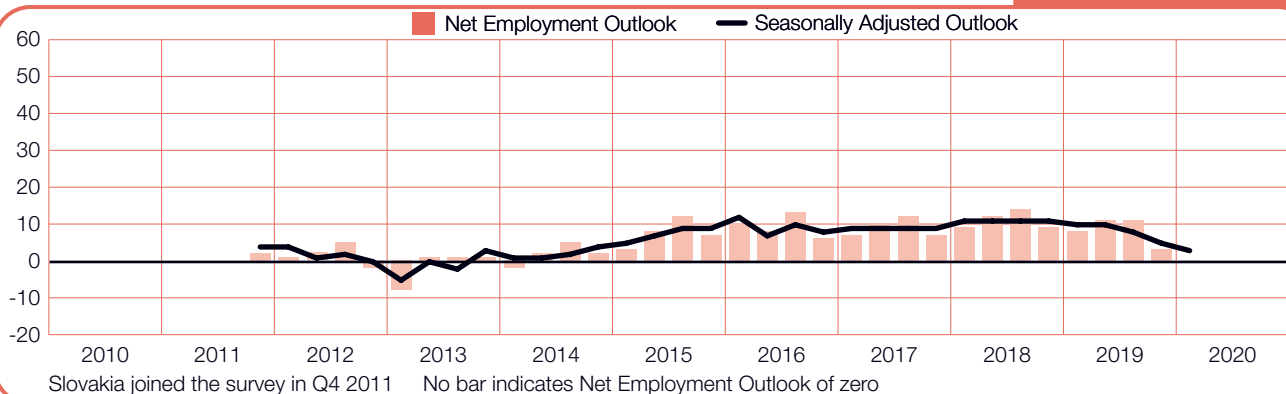
## Romania

**+11 (+14)%**



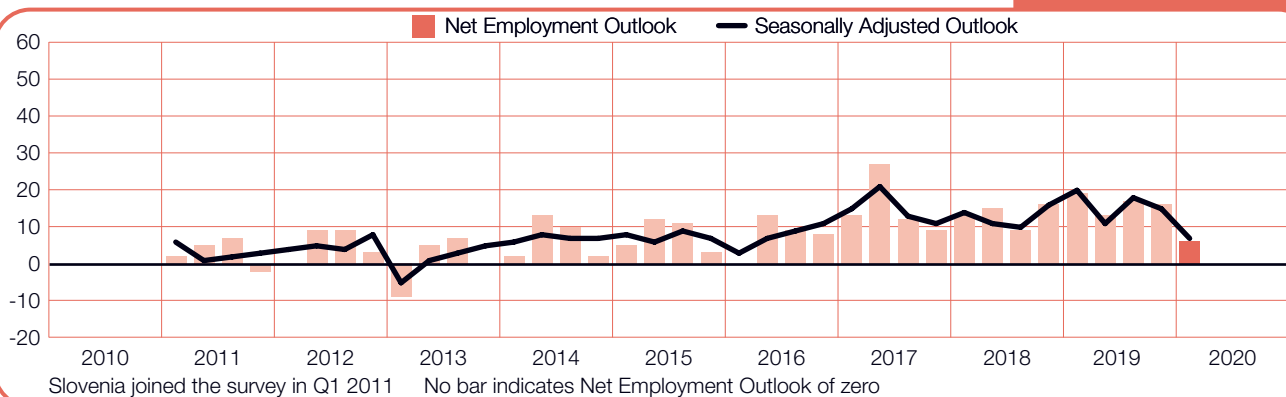
## Slovakia

**0 (+3)%**



## Slovenia

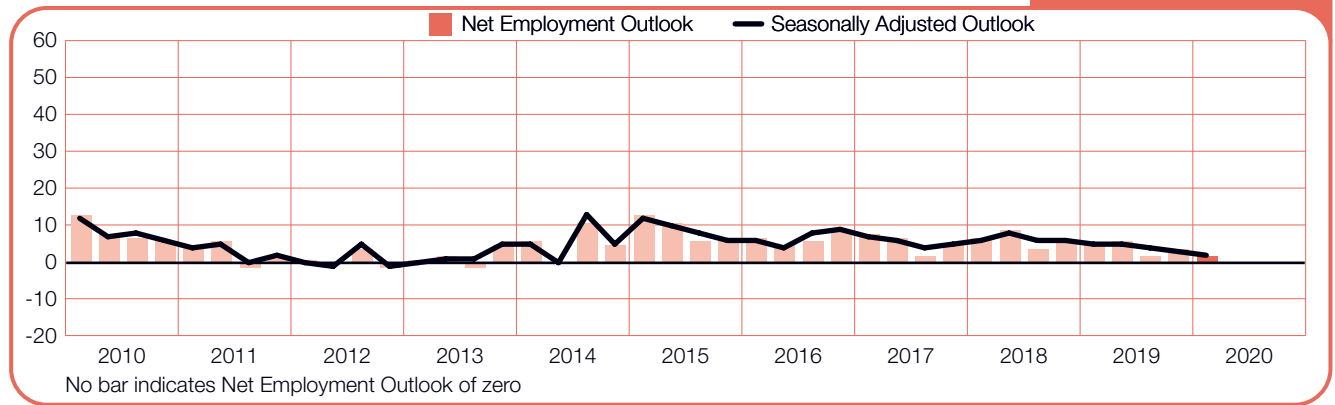
**+6 (+7)%**





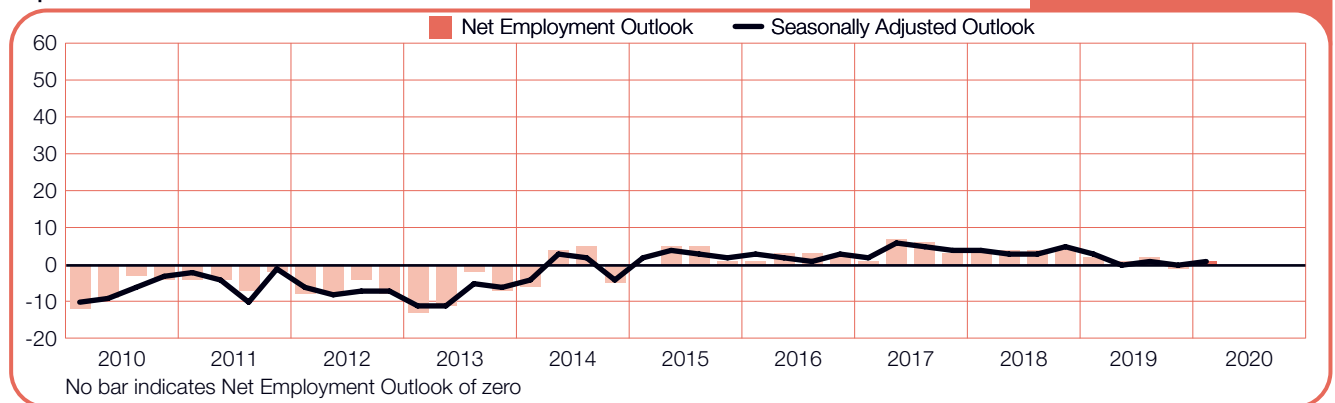
## South Africa

**+2 (+2)%**



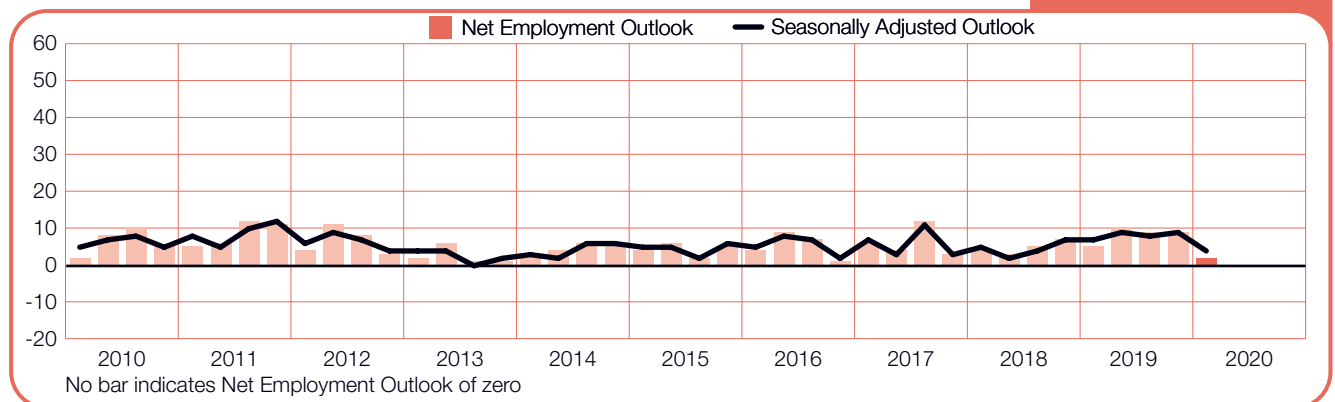
## Spain

**+1 (+1)%**



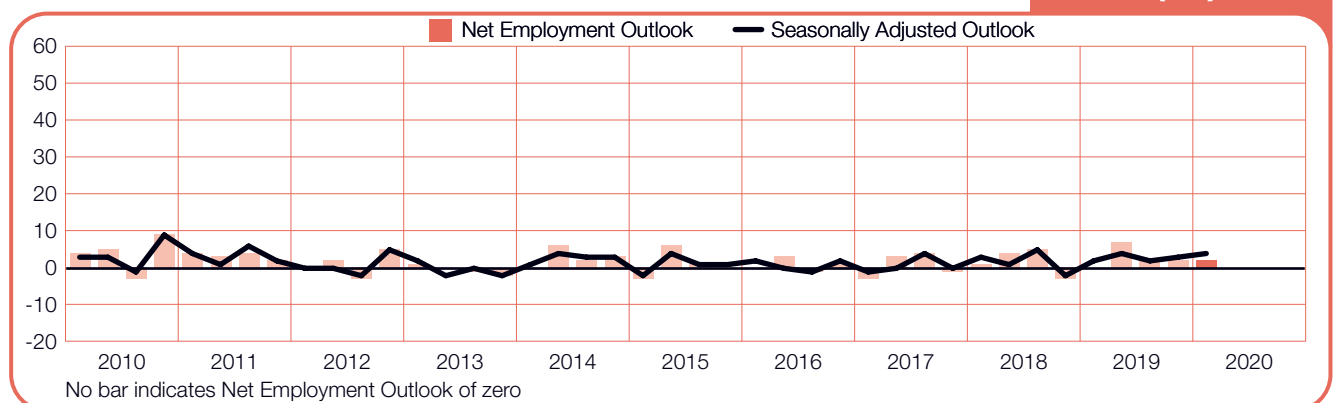
## Sweden

**+2 (+4)%**



## Switzerland

**+2 (+4)%**



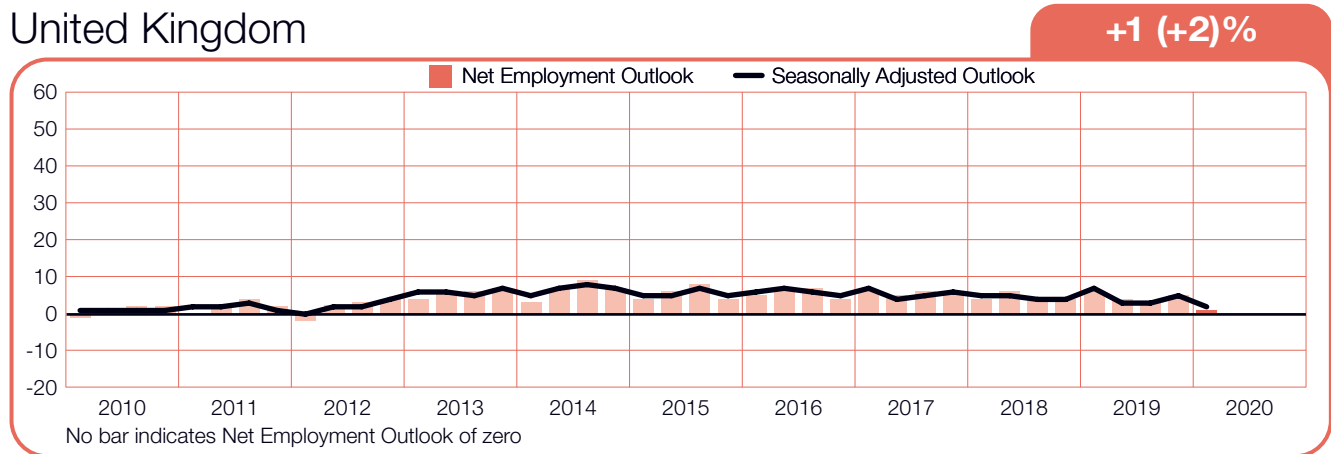
## Turkey

**+5 (+10)%**

Legend: Net Employment Outlook (Red bars), Seasonally Adjusted Outlook (Black line)

Year	Net Employment Outlook (%)	Seasonally Adjusted Outlook (%)
2010	-	31
2011	27	30
2012	34	29
2013	35	29
2014	20	25
2015	23	22
2016	23	22
2017	20	19
2018	19	18
2019	12	12
2020	5	10

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



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# International Comparisons – Americas

For the first quarter of 2020, more than 23,000 employers in North, Central and South America were interviewed for the ManpowerGroup survey. Employers in nine of the 10 Americas countries expect to add to payrolls during the next three months.

Employers in the United States anticipate the strongest hiring pace in the Americas region for the ninth consecutive quarter. Hiring intentions remain relatively stable in comparison with both the prior quarter and the same period last year, and employers expect workforce gains in all 13 industry sectors in the January to March period. In the strongest U.S. sector labour market, Leisure & Hospitality, employers report a three-year high in their forecast. Solid hiring plans in two of the four U.S. regions are also fuelling the positive national Outlook, with employers in the Midwest and the South reporting their strongest forecasts in 19 and 13 years, respectively.

In Canada, employers report fair hiring prospects for the coming quarter, although hiring prospects dip slightly both quarter-over-quarter and year-over-year. Payroll gains are expected in nine of 10 industry sectors during the coming quarter, with the strongest Outlook in 14 years for the Manufacturing - Non-Durables sector and a five-year peak in the Education sector.

Hiring sentiment in Mexico has stabilised following a dip in the previous quarter, with employers expecting moderate job gains during the next three months, although expectations remain weaker than for the same period last year. The strongest hiring plans are reported for the Agriculture & Fishing and Services sectors, but hiring opportunities in the Transport & Communication sector are the weakest reported in 10 years.

Employers in Central America report mixed hiring prospects for the coming quarter. Employers in Guatemala expect the modest hiring pace to continue, with job gains forecast for five of six industry sectors and four of five regions. However, employers in Costa Rica report their weakest Outlook since the survey

began in 2006. While payrolls are expected to grow in four of six industry sectors during Quarter 1 2020, employers expect to trim payrolls in the Construction and Transport & Communication sectors.

The weakest of the 10 Americas labour markets is anticipated in Panama, where employers report the most subdued hiring plans since the survey began 10 years ago, fuelled in part by weak hiring prospects for the Manufacture and Commerce sectors.

In Brazil, employers continue to report fair hiring prospects, driven by positive hiring intentions for the Agriculture, Fishing & Mining sector, and for the Services sector where employers report a five-year high. Hiring prospects in all Brazilian regions have now recovered from the 2015/2016 recession, including Rio de Janeiro State, where the Outlook for the coming quarter is the strongest in five years.

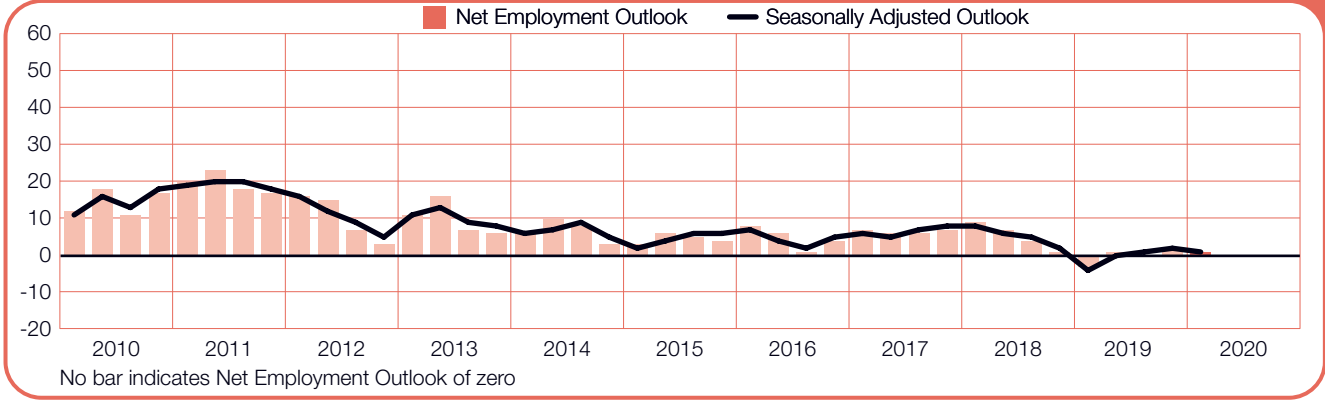
Employers in Argentina continue to report a cautious hiring sentiment following last year's economic uncertainty, with workforce gains anticipated in five of nine sectors and three of six regions in the next three months. Employers in the Construction sector are in part driving the labour market, reporting their strongest hiring plans in two years.

In Colombia, employers anticipate a steady hiring pace in Quarter 1 2020, reporting slightly stronger hiring expectations both quarter-over-quarter and year-over-year. The improvement in hiring prospects is fuelled in part by the strongest Finance, Insurance & Real Estate sector Outlook in five years.

While payroll gains are expected in seven of nine of Peru's industry sectors during the coming quarter, hiring plans are slightly weaker for the country as a whole in comparison with both the prior quarter and last year at this time. Transportation & Utilities employers expect the strongest workforce growth in the next three months, but the Agriculture & Fishing Outlook is the weakest since the survey began in 2006.

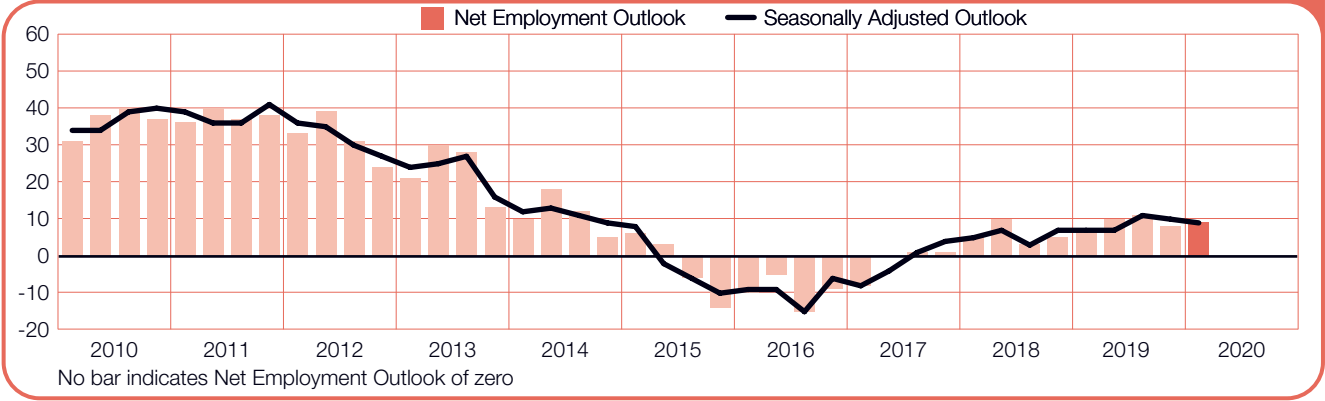
Argentina

+1 (+1)%



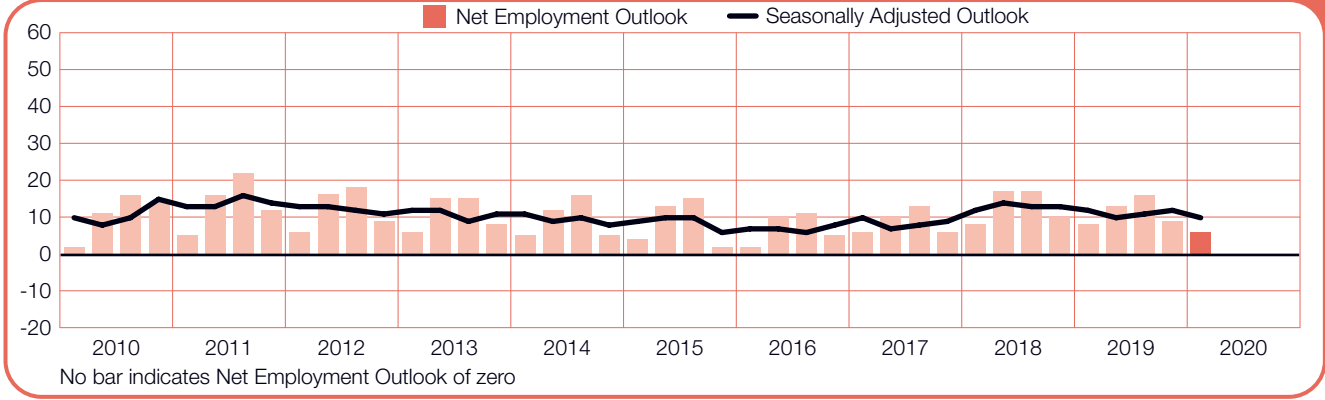
Brazil

+9 (+9)%



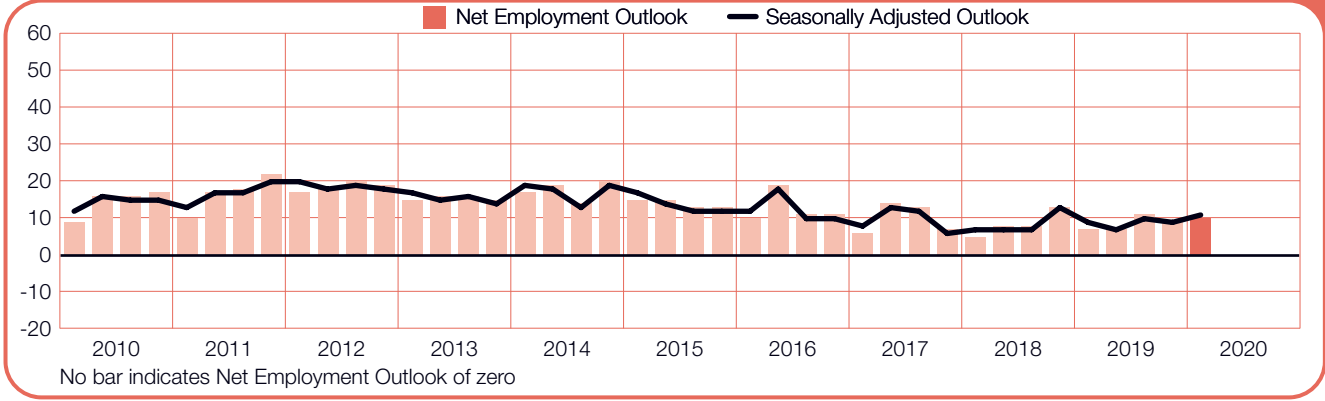
Canada

+6 (+10)%



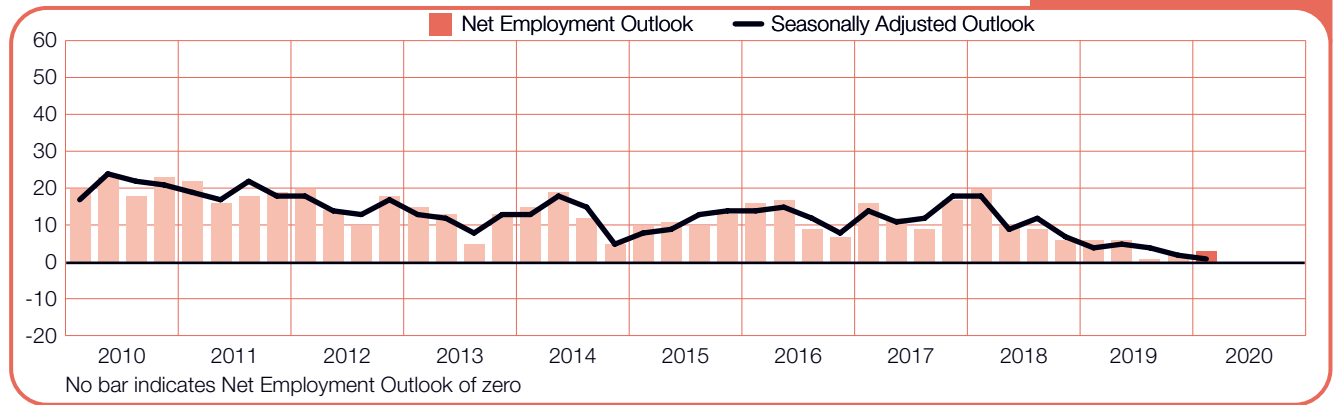
Colombia

+10 (+11)%



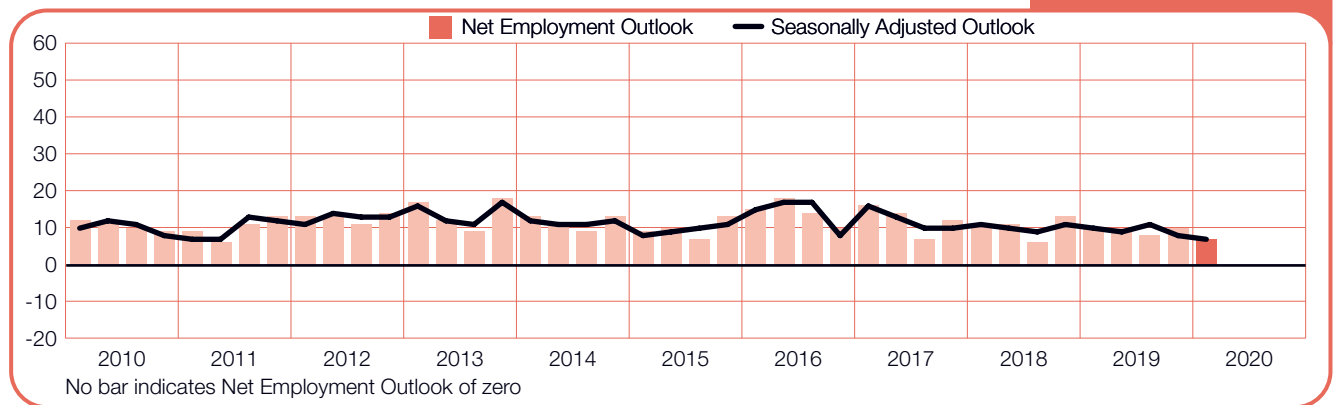
## Costa Rica

**+3 (+1)%**



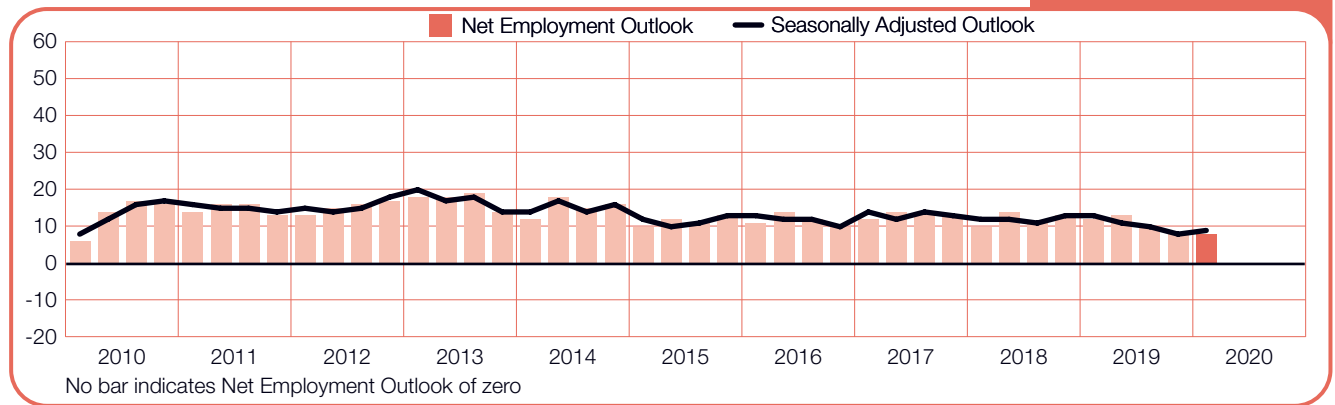
## Guatemala

**+7 (+7)%**



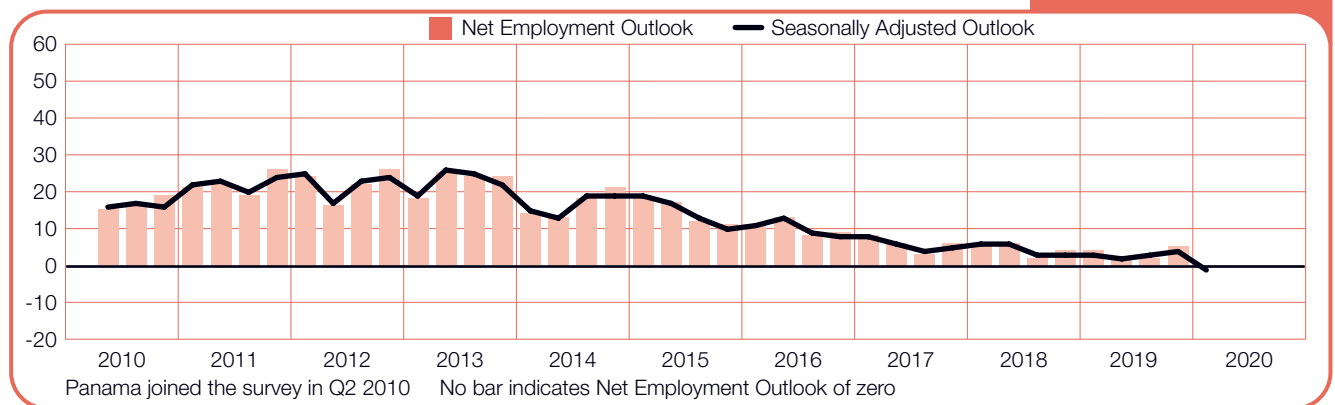
## Mexico

**+8 (+9)%**



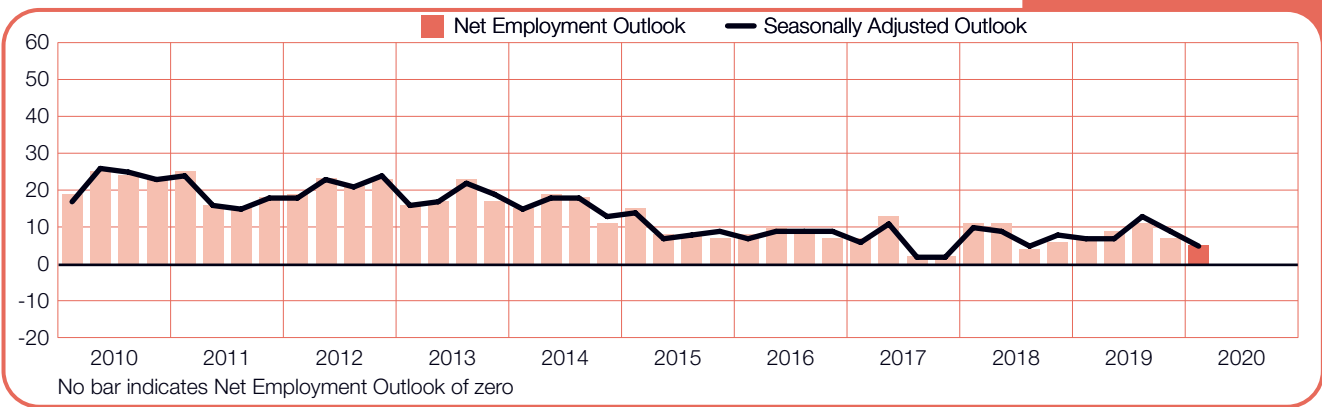
## Panama

**0 (-1)%**



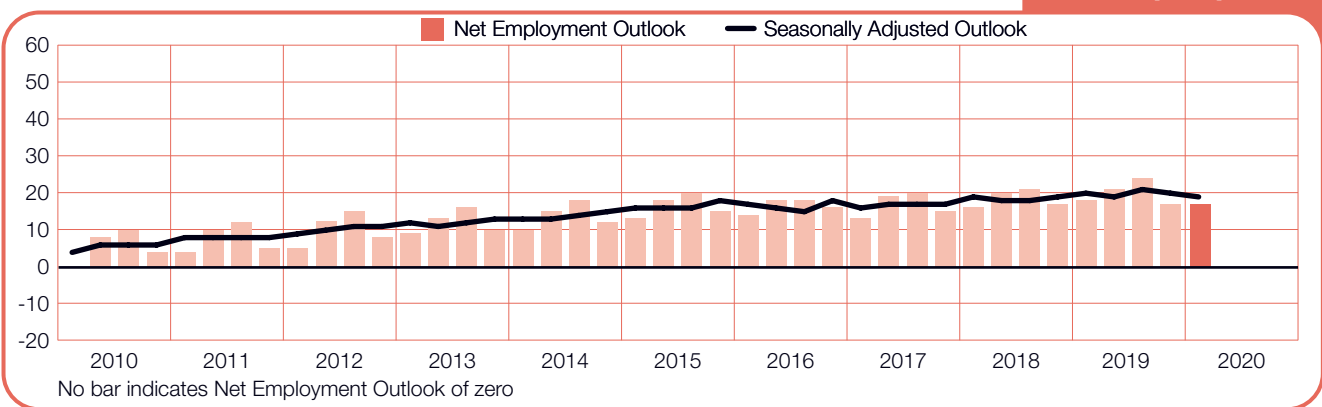
Peru

+5 (+5)%



United States of America

+17 (+19)%



# International Comparisons – Asia Pacific

In the ManpowerGroup survey for the first quarter of 2020, more than 14,000 employers across seven Asia Pacific countries and territories were interviewed, and employers in all seven anticipate payroll gains during the next three months.

For the seventh consecutive quarter, the strongest Asia Pacific labour market is anticipated in Japan, despite a slight decline in hiring sentiment when compared with this time last year. Hiring prospects continue to be driven by a brisk hiring pace in the Mining & Construction sector and strong demand in the Services sector, and employers in Japan's Finance, Insurance & Real Estate sector report their strongest hiring intentions in more than 12 years.

In China, employers report moderate hiring prospects for the January to March period, reflecting a slight improvement in comparison with the final quarter of 2019. However, hiring sentiment remains at a weaker level than reported this time one year ago. Services sector employers report an uptick in hiring activity, and Transportation & Utilities sector employers anticipate the strongest hiring pace in the coming quarter. However, the flat Outlook reported by Mining & Construction sector employers is the weakest in 10 years.

Employers in India report the weakest hiring prospects since the survey began 14 years ago. Hiring sentiment dips in all seven sectors when compared with the prior quarter, and is also weaker in the majority of sectors when compared with this time one year ago. However,

despite this cooling labour market, employers in India continue to forecast payroll growth, most notably in the Services sector.

According to employers in Hong Kong, hiring prospects have slipped to a six-year low. Outlooks weaken in four of six industry sectors when compared with the previous quarter, although Mining & Construction sector employers report an uptick in hiring activity.

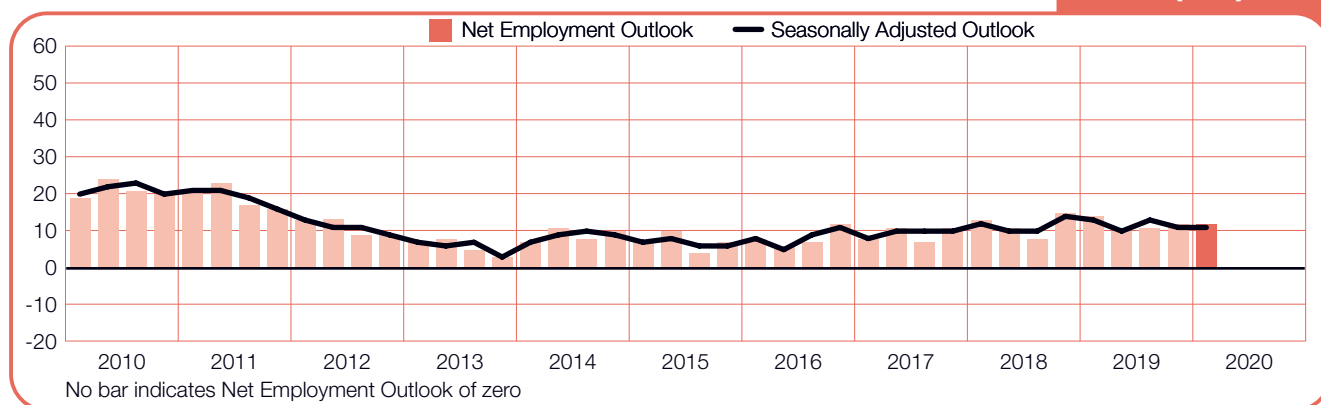
In Singapore, employers report cautiously optimistic hiring intentions for the coming quarter, reflecting a moderate improvement on the two-year low reported in Quarter 4 2019. Public Administration & Education sector employers continue to expect the strongest sector hiring pace, while the Finance, Insurance & Real Estate Outlook climbs considerably when compared with the prior quarter.

In Taiwan, employers forecast an active labour market during the next three months, fuelled by robust hiring plans in both the Services and Mining & Construction sectors.

The favourable hiring climate is forecast to continue in Australia during the first quarter of 2020, with employers reporting no quarter-over-quarter change, although the Outlook dips slightly in comparison with last year at this time. However, hiring prospects for Australia's Finance, Insurance & Real Estate sectors slip to the weakest level reported since the survey began in 2003.

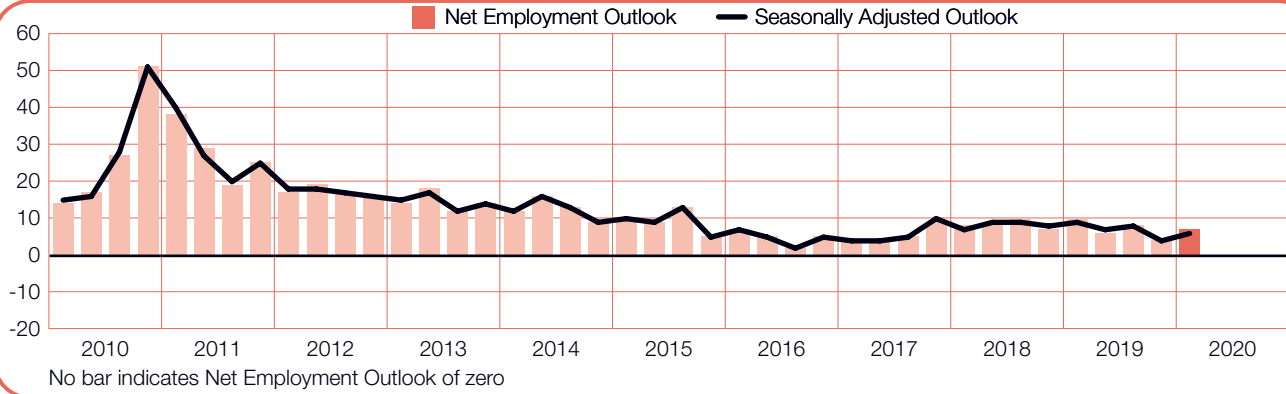
## Australia

**+12 (+11)%**



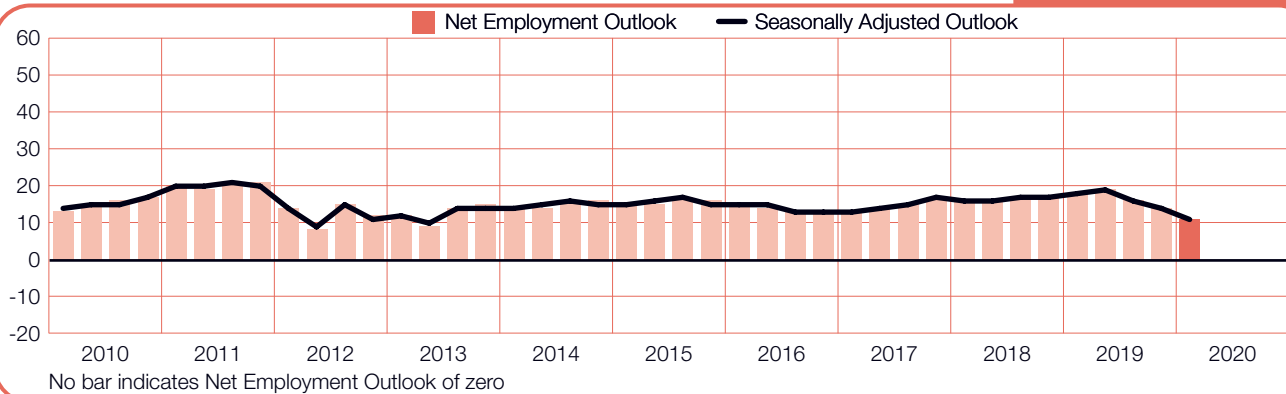
## China

**+7 (+6)%**



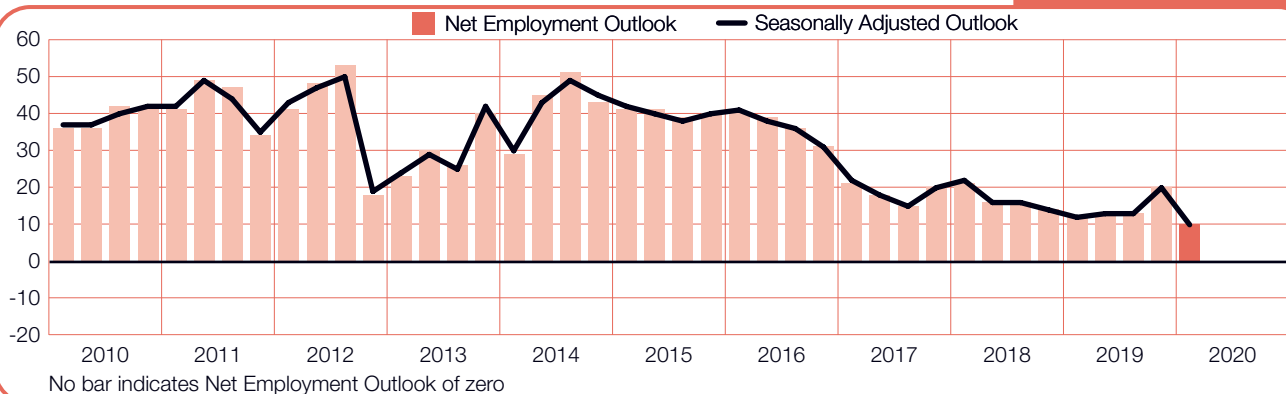
## Hong Kong

**+11 (+11)%**



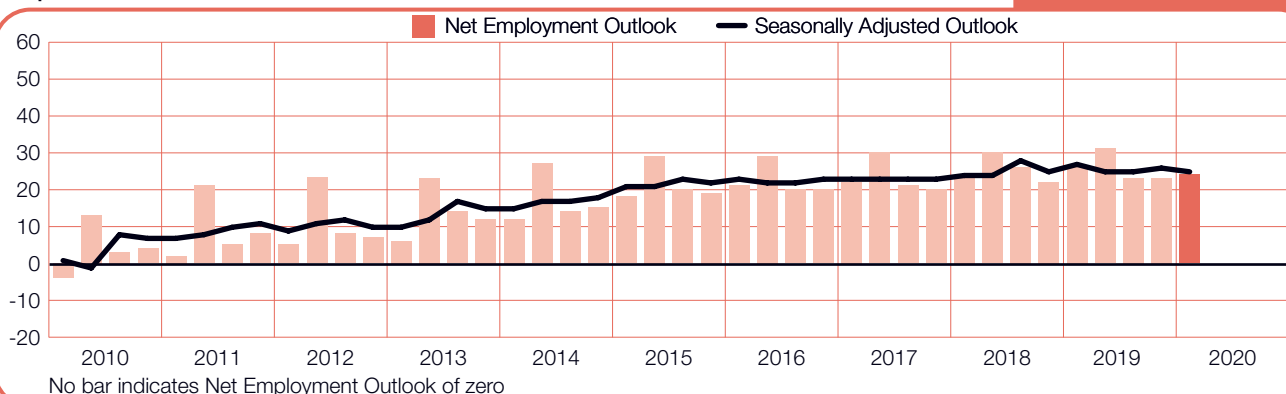
## India

**+10 (+10)%**



## Japan

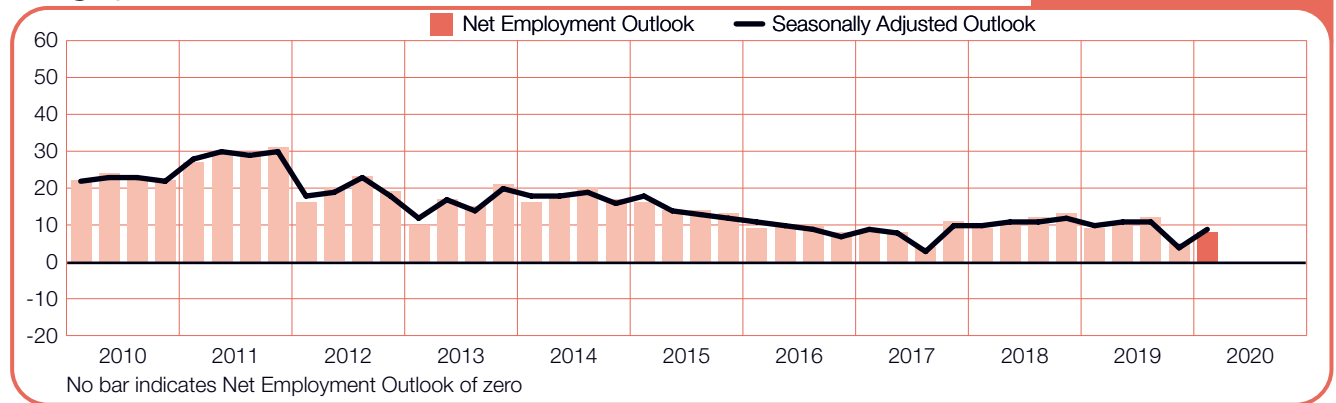
**+24 (+25)%**





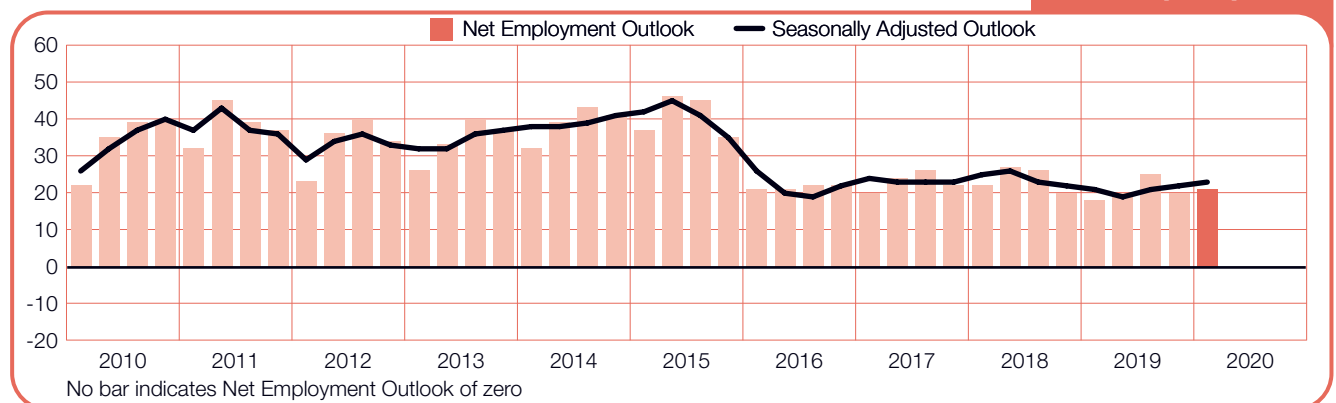
## Singapore

**+8 (+9)%**



## Taiwan

**+21 (+23)%**



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# 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 58,000 public and private employers across 43 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 2020 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 2020 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 +/- 4.0%.

In the UK, the national survey includes 2,101 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.

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# 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 over 70 years. In 2019, ManpowerGroup was named one of the World's Most Ethical Companies for the tenth year and one of Fortune's Most Admired Companies for the seventeenth 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](http://www.manpowergroup.com)

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[manpowergroup.co.uk](http://manpowergroup.co.uk)

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