



PRESS RELEASE Under embargo until 8 September 2020 (00.01 GMT)

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ManpowerGroup Employment Outlook Survey Q2-Q4 2020 Results:

*Japanese employers report **healthy/modest** hiring intentions for the **second/fourth** quarter of 2020.*

Yokohama-City, Kanagawa, Japan ~~(10 March 2020)~~ - ManpowerGroup Co., Ltd. Representative Director and President Masahiro Ikeda, today announced the results of the ManpowerGroup Employment Outlook Survey conducted to measure employer hiring intentions for April-October - June-December 2020. Employers in **Japan** report **healthy/modest** hiring intentions for the second/fourth quarter of 2020 ~~and one of the strongest forecast in the Asia Pacific region~~. With **+33.15%** of employers forecasting an increase in payrolls, **-4.10%** expecting a decrease and **+33.42%** anticipating no change, the seasonally adjusted Net Employment Outlook (NEO)* for the coming quarter stands at **+2.49%**. Hiring sentiment is the weakest reported in nine years, declining by 4 percentage points when compared with the previous quarter and by 18 percentage points in comparison with this time one year ago. Hiring sentiment remains relatively stable when compared with the previous quarter, but declines by 2 percentage points in comparison with last year at this time.

Employers in six of the seven industry sectors expect to increase payrolls during the October to December period. The strongest hiring prospects are reported in two sectors with Net Employment Outlooks of +13% - the Mining & Construction sector and the Services sector. Respectable job gains are forecast in the Finance, Insurance & real Estate sector where the Outlook is +12%, and in the Transportation & Utilities sector with an Outlook of +11%. Elsewhere, Wholesale & Retail Trade sector employers expect a fair hiring climate, reporting an Outlook of +9%, while limited workforce gains are anticipated in the Public Administration & Education sector, with an Outlook of +3%. The weakest labor market is forecast in the Manufacturing sector, where the Outlook stands at 0%.

Hiring sentiment weakens in four of the seven industry sectors when compared with the previous quarter. The most notable decline of 10 percentage points is reported in the Transportation & Utilities sector. Outlooks are 9 and 8 percentage points weaker in the Manufacturing sector and the Finance, Insurance & Real Estate sector, respectively, and Services sector employers report a decline of 5 percentage points. Meanwhile, hiring prospects strengthen in two sectors, by 3 percentage points in the Wholesale & Retail Trade sector and by 2 percentage points in the Public Administration & Education sector.

In a year-over-year comparison, hiring intentions weaken in all seven industry sectors. Sharp declines of 27 and 23 percentage points are reported for the Manufacturing sector and the

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Mining & Construction sector, respectively. The Transportation & Utilities sector Outlook decreases by 20 percentage points, while Services sector employers report a decline of 18 percentage points. Elsewhere, Wholesale & Retail Trade sector employers report a decrease of 15 percentage points and the Outlook for the Finance, Insurance & Real Estate sector decreases by 12 percentage points. Employers in all three regions expect to add to payrolls during the upcoming quarter. The strongest labor markets are forecast in Osaka and Tokyo, where Net Employment Outlooks stand at +9%, while the Outlook for Nagoya is +7%. When compared with the previous quarter, hiring plans decline by 5 percentage points in both Osaka and Tokyo, but are 2 percentage points stronger in Nagoya. Employers in all three regions report considerably weaker hiring prospects when compared with this time one year ago. Hiring plans in Nagoya decline by 20 percentage points, while Outlooks are 19 and 16 percentage points weaker in Tokyo and Osaka, respectively.

*The Net Employment Outlook is derived by taking the percentage of employers anticipating an increase in hiring activity and subtracting from this the percentage of employers expecting a decrease in hiring activity.

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- Survey Period: 15 January-July 2020 – 28 January-July 2020
- Survey Target: HR Directors in 7 sectors in Tokyo, Osaka, and Nagoya
 - 1) Finance, Insurance & Real Estate, 2) Manufacturing, 3) Mining & Construction,
 - 4) Public Administration & Education (including government offices and schools),
 - 5) Services (including information processing, software, entertainment), 6) Transportation & Utilities,
 - 7) Wholesale Trade & Retail Trade
- Survey Questionnaire: "How do you anticipate total employment at your location to change in the three months to the end of June-December 2020 as compared to the current quarter (including contract and temporary)?"
- Method: Collected by a.) telephone contacts and b) e-mail questionnaires
- No. of valid replies: 1,439,097 employers all over Japan (over 5838,000 employers across 43 countries and territories worldwide)

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Global Employment Outlook:

ManpowerGroup interviewed over 38,000 employers in 43 countries and territories to anticipate hiring prospects* in the fourth 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 December 2020 as compared to the current quarter?" Interviewing was carried out during the exceptional circumstances of the COVID-19 outbreak. The survey findings for the October to December 2020 period reflect the impact of the global health emergency, and the subsequent economic shutdown in many countries.

Employers in 22 of the 43 countries and territories surveyed by ManpowerGroup expect to add to payrolls in the period up to the end of December 2020. In 16 countries and territories employers expect to reduce payrolls, while flat hiring activity is forecast in five.

When compared with the third quarter of 2020, hiring prospects improve in 37 countries and territories, but weaken in five, with no change reported in one. Employers in 41 countries and territories report weaker hiring plans when compared with this time one year ago, with no change in one and an improvement in one - Turkey. The strongest labor markets are expected in Taiwan, the United States, Turkey, Japan and Greece, while the weakest hiring intentions are reported in Panama, Costa Rica, Cambodia, the United Arab Emirates, the United Kingdom, and the United States.

* Data is not seasonally adjusted for Croatia and Portugal

The complete results for the ManpowerGroup Employment Outlook Survey are available for download at <https://www.manpowergroup.com/workforce-insights/data-driven-workforce-insights/manpowergroup-employment-outlook-survey-results>.

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About the ManpowerGroup Employment Outlook 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 Manpower 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 2Q-4Q 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 June-December 2020 as compared to the current quarter?"

About ManpowerGroup:

ManpowerGroup® (NYSE: MAN), the leading global workforce solutions company, helps organizations 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 organizations 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 and Talent Solutions – creates substantial value for candidates and clients across more than 75 countries and territories and has done so for over 70 years. We are recognized consistently for our diversity - as a best place to work for Women, Inclusion, Equality and Disability and in 2020 ManpowerGroup was named one of the World's Most Ethical Companies for the eleventh year - all

About ManpowerGroup Co., Ltd.

ManpowerGroup Co., Ltd. was established in 1966 as a wholly owned Japanese subsidiary of ManpowerGroup. As the first temporary work services company in the country, ManpowerGroup has built foundation of the temporary work services and has been providing high-quality services. We now have 54359,211 temporary staff. More information on ManpowerGroup Co., Ltd. can be found at the company's Web site, www.manpowergroup.jp