

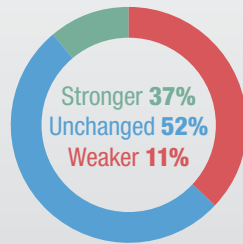
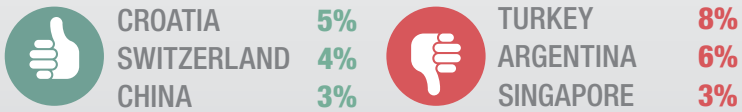
Q1 2019 MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

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

HOW ARE EMPLOYER HIRING PLANS CHANGING?

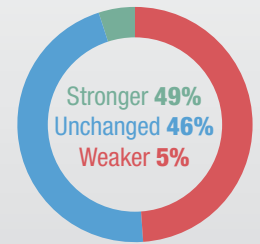
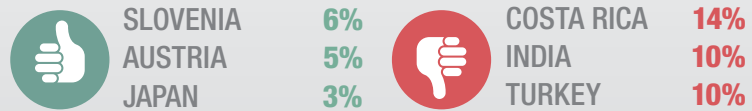
NOTABLE QUARTER-OVER-QUARTER SHIFTS

Compared to 44 countries & territories surveyed for Q4 2018



NOTABLE YEAR-OVER-YEAR SHIFTS

Compared to 43 countries & territories surveyed for Q1 2018†



NET EMPLOYMENT OUTLOOKS

ManpowerGroup asked over 60,000 employers from 44 countries and territories, "How do you anticipate total employment at your location will change in the next three months to the end of March 2019 as compared to the current quarter?"

ASIA PACIFIC

- Employers expect payrolls to grow by varying levels in all 8 Asia Pacific countries and territories.
- When compared with Q4, stronger hiring prospects are reported in 4 countries/territories, weaken in 2 and are unchanged in 2.
- Year-over-year, hiring intentions improve in 5 countries and territories, decline in 2 and remain unchanged in 1.

EMEA

- Staffing levels are forecast to grow by varying levels in all 26 countries.
- Hiring plans improve in 8 countries when compared with the previous quarter but weaken in 15.
- In a year-over-year comparison, Outlooks improve in 12 countries but decline in 13.*

*Survey results for both Croatia & Portugal are not seasonally adjusted

AMERICAS

- Staffing levels are forecast to grow by varying levels in 9 countries, but decline in Argentina where employers report the only negative Q1 Outlook.
- Compared to Q4, forecasts improve in 4 countries and decline in 6.
- In a year-over-year comparison, hiring plans strengthen in 4 countries, weaken in 5 and are unchanged in 1.
- For the fifth consecutive quarter, U.S. employers report the region's strongest hiring plans.

†Croatia joined the survey in Q2 of 2018 & has no year-over-year data for comparison.