The ManpowerGroup Employment Outlook Survey for the second quarter 2020 was conducted by interviewing a representative sample of 1,933 employers in Canada.

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

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Canadian Employment Outlook

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Canadian employers report respectable hiring intentions for the second quarter of 2020. With 14% of employers forecasting an increase in payrolls, 3% anticipating a decrease and 82% expecting no change, the resulting Net Employment Outlook is +11%.

Once the data is adjusted to allow for seasonal variation, the Outlook stands at +9% and is the weakest reported in two years. Hiring prospects remain relatively stable when compared with the previous quarter, but decline by 2 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.
Organization-Size Comparisons

Participating employers are categorized into one of four organization sizes: Micro businesses have less than 10 employees; Small businesses have 10-49 employees; Medium businesses have 50-249 employees; and Large businesses have 250 or more employees.

Employers in all four organization size categories expect to grow payrolls in the forthcoming quarter. Large employers report active hiring plans with a Net Employment Outlook of +25%, while steady job gains are forecast by Medium firms with an Outlook of +13%. Elsewhere, Outlooks stand at +7% and +1% for Small- and Micro-size employers, respectively.

Hiring prospects remain relatively stable for Micro-, Small- and Large-size firms when compared with the previous quarter, while Medium employers report no change.

In a comparison with this time one year ago, Outlooks decline by 3 percentage points for Small- and Large-size employers, while decreases of 2 percentage points are reported in both the Micro- and Medium-size categories.

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Graph displays Seasonally Adjusted Data
Regional Comparisons

Atlantic Canada

Job seekers can expect a conservative hiring pace in the second quarter of 2020, according to employers who report a Net Employment Outlook of +9%. Hiring plans decline by 2 and 3 percentage points in comparison with the prior quarter and last year at this time, respectively.

Employers in all 10 industry sectors expect to grow payrolls during the upcoming quarter. Manufacturing – Durables sector employers anticipate the strongest labour market, reporting a robust Net Employment Outlook of +32%. In the Education sector, employers report the strongest hiring intentions in 12 years with an Outlook of +26%, while Finance, Insurance & Real Estate sector employers report an upbeat Outlook of +20%. Steady hiring activity is forecast for the Transportation & Public Utilities sector where the Outlook is +18%, and in the Public Administration sector with an Outlook of +11%. Meanwhile, the weakest forecasts are reported in the Manufacturing – Non-Durables sector and the Construction sector, with Outlooks of +1% and +2%, respectively.

Hiring prospects weaken in seven of the 10 industry sectors when compared with the previous quarter. A considerable decrease of 20 percentage points is reported in the Manufacturing – Non-Durables sector. Elsewhere, Outlooks are 8 percentage points weaker in both the Construction sector and the Public Administration sector, while Mining sector employers report a decrease of 7 percentage points. However, hiring plans strengthen in three sectors, including a sharp increase of 45 percentage points in the Manufacturing – Durables sector and an improvement of 7 percentage points in the Transportation & Public Utilities sector.

When compared with last year at this time, hiring sentiment strengthens in six of the 10 industry sectors, most notably by 16 and 6 percentage points in the Education sector and the Construction sector, respectively. However, Outlooks are considerably weaker in four sectors. Mining sector employers report a decrease of 13 percentage points, while Outlooks are 12 and 11 percentage points weaker in the Public Administration sector and the Manufacturing – Non-Durables sector, respectively.

Employers in all seven areas expect to grow payrolls during the upcoming quarter. The strongest hiring prospects are reported in Halifax and Moncton, with Outlooks of +20% and +13%, respectively. Meanwhile, the weakest labour markets are expected in St. John’s, with an Outlook of +1%, and in Cape Breton Area where the Outlook is +4%.

Hiring prospects weaken in four areas when compared with the previous quarter. Charlottetown employers report the most notable decrease of 11 percentage points, while Outlooks are 5 and 4 percentage points weaker in Cape Breton Area and Moncton, respectively. However, Outlooks strengthen in three areas, including Halifax with an increase of 9 percentage points.

In a comparison with this time one year ago, employers also report weaker hiring plans in four areas. Considerable decreases are reported in Charlottetown and Cape Breton Area, declining by 13 and 12 percentage points, respectively. Elsewhere, Outlooks strengthen in two areas, most notably by 6 percentage points in Saint John.

<table>
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<th>Industry</th>
<th>Increase</th>
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With a Net Employment Outlook of +10%, employers expect the fair hiring climate to continue in the next three months. Hiring intentions are unchanged in comparison with both Quarter 1 2020 and the second quarter of 2019.

Workforce gains are forecast for all 10 industry sectors during the coming quarter. The strongest hiring intentions are reported by Construction sector employers with a Net Employment Outlook of +14%. Moderate payroll growth is forecast for two sectors with Outlooks of +10% – the Finance, Insurance & Real Estate sector and the Wholesale & Retail Trade sector. Outlooks stand at +9% in both the Manufacturing – Durables sector, where employers report the weakest hiring plans in four years, and in the Public Administration sector. Meanwhile, the weakest labour markets are expected in the Manufacturing – Non-Durables sector with an Outlook of +3%, and in the Mining sector where the Outlook stands at +4%.

In a quarter-over-quarter comparison, hiring plans weaken in six of the 10 industry sectors. A considerable decline of 11 percentage points is reported in the Public Administration sector. Outlooks are 9 and 6 percentage points weaker in the Manufacturing – Durables sector and the Education sector, respectively, and the Manufacturing – Non-Durables sector Outlook declines by 4 percentage points. Elsewhere, hiring prospects strengthen in three sectors, most notably by 4 percentage points in the Construction sector and by 2 percentage points in the Wholesale & Retail Trade sector.

Employers in six of the 10 industry sectors report weaker hiring intentions when compared with this time one year ago. Transportation & Public Utilities sector employers report a considerable decline of 16 percentage points, while Outlooks are 7 and 4 percentage points weaker in the Finance, Insurance & Real Estate sector and the Manufacturing – Durables sector, respectively. However, hiring sentiment strengthens in two sectors, increasing by 13 and 3 percentage points in the Construction sector and the Wholesale & Retail Trade sector, respectively.

Job gains are expected in 23 of the 24 areas during the second quarter of 2020. Belleville employers report the strongest hiring plans with an upbeat Outlook of +20%. Steady hiring activity is expected in Burlington/Oakville where the Outlook is +15%, and in four areas with Outlooks of +11% – Brantford, Kitchener/Cambridge Area, Ottawa and York Region. Meanwhile, Cornwall employers expect to trim payrolls, reporting an Outlook of -3%, and subdued hiring prospects are reported in two areas with Outlooks of +1% – Niagara Falls and Peterborough.

In a comparison with the first quarter of 2020, hiring intentions improve in 10 areas. The most noteworthy increases of 7 and 6 percentage points are reported in Belleville and Burlington/Oakville, respectively, and Outlooks are 4 percentage points stronger in both Barrie and York Region. However, Outlooks also weaken in 10 areas, including declines of 8 percentage points for Cornwall and Peterborough, and a decrease of 6 percentage points in Kingston.

Hiring plans strengthen in 13 areas year-over-year, with St Catharines employers reporting the most notable improvement of 20 percentage points. The Kingston Outlook increases by 10 percentage points, and an improvement of 9 percentage points is reported in Thunder Bay. Meanwhile, Outlooks decline in 10 areas, including sharp decreases of 26 and 22 percentage points for Cornwall and Niagara Falls, respectively. Peterborough employers report a decline of 16 percentage points and the Kitchener/Cambridge Area Outlook is 12 percentage points weaker.
Quebec

Employers anticipate positive payroll gains during the coming quarter, reporting a Net Employment Outlook of +17%. Hiring intentions decline by 2 percentage points when compared with the previous quarter, but remain relatively stable in comparison with this time one year ago.

An increase in payrolls is forecast for all 10 industry sectors during the second quarter of 2020. The strongest labour market is anticipated in the Transportation & Public Utilities sector, where the Net Employment Outlook of +45% reflects bullish hiring plans. Public Administration sector employers also report dynamic hiring intentions with an Outlook of +42% – the strongest for the sector in eight years. Elsewhere, Manufacturing – Durables sector employers report brisk hiring plans with an Outlook of +31%, while Outlooks of +23% and +22% are reported in the Finance, Insurance & Real Estate sector and the Manufacturing – Non-Durables sector, respectively. Steady hiring activity is forecast for the Mining sector with an Outlook of +19%, and in the Services sector where the Outlook is +12%. Construction sector employers expect the weakest labour market, reporting an Outlook of +5%.

In a comparison with the first quarter of 2020, hiring prospects weaken in six of the 10 industry sectors. The most noteworthy declines of 14 percentage points are reported in both the Construction sector and the Services sector, while Outlooks are 7 percentage points weaker in both the Education sector and the Wholesale & Retail Trade sector. Meanwhile, Outlooks strengthen in four sectors, including a sharp increase of 28 percentage points for the Mining sector and improvements of 20 and 10 percentage points for the Public Administration sector and the Manufacturing – Durables sector, respectively.

Hiring sentiment strengthens in five of the 10 industry sectors when compared with this time one year ago. Transportation & Public Utilities sector employers report the most notable increase of 20 percentage points, and Outlooks increase by 17 and 12 percentage points in the Mining sector and the Manufacturing – Durables sector, respectively. Elsewhere, employers in five sectors report weaker hiring plans. Wholesale & Retail Trade sector employers report a decrease of 9 percentage points, while the Manufacturing – Non-Durables sector Outlook declines by 8 percentage points.

Employers in all five areas expect to grow payrolls in the coming quarter. The strongest hiring plans are reported in Quebec City where the Outlook is +32%. Montérégie (formerly Granby) employers forecast a healthy hiring pace with an Outlook of +21%, while steady workforce gains are anticipated in Laval and Cantons de l’Est (formerly Sherbrooke), where Outlooks stand at +18% and +14%, respectively. Montreal employers anticipate a moderate hiring pace, reporting an Outlook of +9%.

When compared with the previous quarter, Outlooks weaken in four of the five areas, most notably by 13 percentage points in Montérégie (formerly Granby) and by 11 percentage points in Cantons de l’Est (formerly Sherbrooke) and by 11 percentage points in Montérégie (formerly Granby). However, the Quebec City Outlook improves by 24 percentage points.

In a year-over-year comparison, Outlooks improve by 14 and 4 percentage points in Quebec City and Laval, respectively. However, Montreal employers report a decrease of 10 percentage points, while the Outlook for Cantons de l’Est (formerly Sherbrooke) declines by 7 percentage points.
Western Canada

The weakest labour market in four years is anticipated during the April to June period. Employers report a soft Net Employment Outlook of +5%, remaining relatively stable quarter-over-quarter, but declining by 5 percentage points when compared with this time one year ago.

Employers forecast job gains in all 10 industry sectors during the forthcoming quarter. The strongest labour market is anticipated by Mining sector employers who report a Net Employment Outlook of +15%. Public Administration sector employers expect a steady hiring pace, reporting an Outlook of +12%, while the Construction sector Outlook stands at +11%. Employers in three sectors anticipate moderate hiring activity with Outlooks of +10% – the Education sector, the Finance, Insurance & Real Estate sector and the Transportation & Public Utilities sector. Meanwhile, the weakest labour market is expected in the Wholesale & Retail Trade sector, where the Outlook is +1%.

Hiring plans strengthen in four of the 10 industry sectors when compared with the previous quarter, most notably by a considerable margin of 17 percentage points in the Mining sector. Elsewhere, Outlooks improve by 3 and 2 percentage points in the Finance, Insurance & Real Estate sector and the Transportation & Public Utilities sector, respectively. However, Outlooks also weaken in four sectors. Manufacturing – Durables sector employers report the most noteworthy decrease of 7 percentage points and the Manufacturing – Non-Durables sector Outlook declines by 4 percentage points.

When compared with the second quarter of 2019, hiring sentiment weakens in six of the 10 industry sectors. Manufacturing – Durables sector employers report a considerable decrease of 18 percentage points, and Outlooks are 8 and 6 percentage points weaker in the Transportation & Public Utilities sector and the Wholesale & Retail Trade sector, respectively. Outlooks decline by 4 percentage points in three sectors – the Manufacturing – Non-Durables sector, the Public Administration sector and the Services sector. Meanwhile, hiring prospects strengthen in four sectors, including an increase of 6 percentage points for the Mining sector and an improvement of 5 percentage points in the Education sector.

Job seekers can expect hiring opportunities in 10 of the 11 areas during the coming quarter, according to employers. The strongest hiring plans are reported in Richmond-Delta, where the Outlook is +16%. Burnaby-Coquitlam employers forecast a moderate hiring pace with an Outlook of +10% and the Calgary Outlook stands at +7%. However, Saskatoon employers expect to trim payrolls, reporting an Outlook of -6%.

Hiring intentions weaken in six areas when compared with the previous quarter, most notably by 13 percentage points in Victoria & Capital Regional District and by 12 percentage points in Saskatoon. Meanwhile, hiring plans improve in five areas, including increases of 6 percentage points for both Calgary and Red Deer.

In a year-over-year comparison, Outlooks also decline in six areas. Victoria & Capital Regional District employers report a considerable decrease of 17 percentage points, while hiring prospects are 14 and 11 percentage points weaker in Saskatoon and Burnaby-Coquitlam, respectively. Elsewhere, hiring sentiment strengthens in four areas, most notably by 7 percentage points in Richmond-Delta.

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<th>Industry</th>
<th>Increase</th>
<th>Decrease</th>
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<th>Net Employment Outlook</th>
<th>Seasonally Adjusted</th>
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Employers anticipate payroll gains in all 10 industry sectors during the second quarter of 2020. The strongest hiring pace is anticipated by Public Administration sector employers with a Net Employment Outlook of +13%. Steady hiring activity is also forecast in four sectors with Outlooks of +12% – the Construction sector, the Manufacturing – Durables sector, the Mining sector and the Transportation & Public Utilities sector. Elsewhere, Finance, Insurance & Real Estate sector employers report a respectable Outlook of +11%, while the Education sector Outlook stands at +10%. Meanwhile, Manufacturing – Non-Durables sector employers forecast the weakest hiring pace, reporting an Outlook of +3%.

Hiring prospects weaken in six of the 10 industry sectors when compared with the prior quarter. The most notable decline of 13 percentage points is reported in the Manufacturing – Non-Durables sector, while Outlooks are 6 and 4 percentage points weaker in the Education sector and the Manufacturing – Durables sector, respectively. Hiring plans decrease by 3 percentage points in two sectors – the Finance, Insurance & Real Estate sector and the Public Administration sector. However, Outlooks strengthen in three sectors, most notably by 11 percentage points in the Mining sector.

When compared with last year at this time, hiring sentiment also weakens in six of the 10 industry sectors. Transportation & Public Utilities sector employers report a considerable decrease of 11 percentage points and the Manufacturing – Non-Durables sector Outlook is 8 percentage points weaker. Elsewhere, hiring plans decline by 3 percentage points in four sectors – the Finance, Insurance & Real Estate sector, the Manufacturing – Durables sector, the Public Administration sector and the Services sector. Meanwhile, Outlooks improve in four sectors, including increases of 7 and 4 percentage points in the Construction sector and the Mining sector, respectively.
+12 (+12)%
Construction
With a Net Employment Outlook of +12%, employers forecast respectable payroll gains during the next three months. Hiring intentions remain relatively stable when compared with the previous quarter and improve by 7 percentage points in comparison with last year at this time.

+8 (+10)%
Education
Employers expect a fair hiring climate in Quarter 2 2020, reporting a Net Employment Outlook of +10%. The Outlook declines by 6 percentage points in a comparison with Quarter 1 2020, but remains relatively stable when compared with this time one year ago.
Finance, Insurance & Real Estate

Job seekers can expect a steady hiring pace in the April to June period, according to employers who report a Net Employment Outlook of +11%. However, hiring prospects decline by 3 percentage points both quarter-over-quarter and year-over-year.

Manufacturing – Durable Goods

A favourable hiring climate is anticipated in the forthcoming quarter, with employers reporting a Net Employment Outlook of +12%. However, hiring plans decline by 4 percentage points when compared with the previous quarter and are 3 percentage points weaker in comparison with last year at this time.
Manufacturing – Non-Durable Goods

The weakest labour market in three years is forecast for the second quarter of 2020. Employers report a cautious Net Employment Outlook of +3%, declining by 13 percentage points quarter-over-quarter and by 8 percentage points when compared with this time one year ago.

Mining

Reporting a Net Employment Outlook of +12%, employers anticipate respectable job gains in the next three months. The Outlook improves both quarter-over-quarter and year-over-year, increasing by 11 and 4 percentage points, respectively.
Public Administration
Job seekers can expect a steady hiring pace in Quarter 2 2020, according to employers who report a Net Employment Outlook of +13%. However, the Outlook is the weakest reported in three years, decreasing by 3 percentage points in comparison with both the previous quarter and last year at this time.

Services
The weakest labour market in more than two years is forecast for the upcoming quarter. Employers report a Net Employment Outlook of +7%, remaining relatively stable when compared with the previous quarter, but decreasing by 3 percentage points in comparison with the second quarter of 2019.
Transportation & Public Utilities

The positive hiring climate is expected to continue in the April to June period, with employers reporting a Net Employment Outlook of +12% for the second consecutive quarter. However, hiring plans decline by a considerable margin of 11 percentage points when compared with this time one year ago.

Wholesale & Retail Trade

Employers anticipate moderate payroll gains in the coming quarter, reporting a Net Employment Outlook of +8%. Hiring prospects improve by 2 percentage points both quarter-over-quarter and year-over-year.
Global Employment Outlook

ManpowerGroup interviewed over 58,000 employers in 43 countries and territories to forecast labour market activity* in the second 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 June 2020 as compared to the current quarter?”

In the ManpowerGroup research for the second quarter of 2020, employers in 42 of 43 countries and territories surveyed expect to increase payrolls in the April to June period.

When compared with the first quarter of 2020, hiring intentions strengthen in 23 of the 43 countries and territories, while employers in 11 report weaker hiring plans, with no change reported in nine. In a comparison with this time one year ago, employers in 15 countries and territories report stronger hiring prospects, while hiring plans decline in 21, and are unchanged in seven. The strongest hiring activity is anticipated in Croatia, Greece, Japan and Taiwan, while the weakest labour markets are expected in Panama, Hong Kong, Poland and South Africa.

Workforce gains are expected in all 26 Europe, Middle East & Africa (EMEA) region countries surveyed during the second quarter of 2020. When compared with the prior quarter, hiring prospects strengthen in 15 countries, but weaken in seven. In a comparison with the second quarter of 2019, Outlooks improve in nine countries, but decline in 12. Employers in Croatia and Greece expect the strongest labour markets during the forthcoming quarter, while the weakest hiring sentiment is reported in Poland and South Africa.

Employers in all seven Asia Pacific countries and territories expect to grow payrolls in the April to June period. In a comparison with the previous quarter, hiring prospects strengthen in two countries and territories, but weaken in three. When compared with this time one year ago, hiring intentions decline in five countries and territories, while improving in one. Employers expect the strongest hiring pace in Japan and Taiwan during the next three months, while the most cautious hiring plans are reported in Hong Kong.

Payrolls are expected to grow in nine of the 10 Americas countries surveyed during the second quarter of 2020, while Panamanian employers continue to anticipate a subdued hiring climate. When compared with the prior quarter, hiring plans strengthen in six Americas countries, but decline in one. In a year-over-year comparison, employers in five countries report stronger hiring sentiment, but hiring prospects weaken in four. Americas employers expect the strongest hiring activity in the U.S. and Brazil during the coming quarter, while the weakest labour market is anticipated 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

The next ManpowerGroup Employment Outlook Survey will be released on 9 June 2020 and will detail expected labour market activity for the third quarter of 2020.

* Commentary is based on seasonally adjusted data where available. Data is not seasonally adjusted for Croatia or Portugal.
### Quarter 2 2020 Net Employment Outlook

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<th>Qtr on Qtr Change</th>
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<td>Guatemala</td>
<td>11 (10)(^1)</td>
<td>4 (3)(^1)</td>
<td>1 (1)(^1)</td>
</tr>
<tr>
<td>Mexico</td>
<td>10 (9)(^1)</td>
<td>2 (0)(^1)</td>
<td>-3 (-3)(^1)</td>
</tr>
<tr>
<td>Panama</td>
<td>-1 (0)(^1)</td>
<td>-1 (1)(^1)</td>
<td>-3 (-3)(^1)</td>
</tr>
<tr>
<td>Peru</td>
<td>7 (5)(^1)</td>
<td>3 (1)(^1)</td>
<td>-4 (-3)(^1)</td>
</tr>
<tr>
<td>United States</td>
<td>20 (19)(^1)</td>
<td>3 (0)(^1)</td>
<td>-1 (0)(^1)</td>
</tr>
</tbody>
</table>

| **Asia Pacific** |                |                  |                 |
| Australia        | 9 (9)\(^1\)    | -3 (-2)\(^1\)    | -1 (-1)\(^1\)   |
| China            | 6 (8)\(^1\)    | -1 (0)\(^1\)     | 0 (0)\(^1\)     |
| Hong Kong        | 0 (1)\(^1\)    | -11 (-10)\(^1\)  | -19 (-18)\(^1\) |
| India            | 12 (12)\(^1\)  | 2 (2)\(^1\)      | -1 (-1)\(^1\)   |
| Japan            | 29 (24)\(^1\)  | 5 (-1)\(^1\)     | -2 (-2)\(^1\)   |
| Singapore        | 9 (9)\(^1\)    | 1 (0)\(^1\)      | -2 (-2)\(^1\)   |
| Taiwan           | 24 (24)\(^1\)  | 3 (1)\(^1\)      | 4 (4)\(^1\)     |

| **EMEA\(^1\)**  |                |                  |                 |
| Austria          | 10 (8)\(^1\)   | 6 (-1)\(^1\)     | -4 (-4)\(^1\)   |
| Belgium          | 13 (13)\(^1\)  | 1 (1)\(^1\)      | 1 (1)\(^1\)     |
| Bulgaria         | 10 (6)\(^1\)   | 6 (-1)\(^1\)     | 0 (1)\(^1\)     |
| Croatia          | 24              | 19               | -10             |
| Czech Republic   | 5 (5)\(^1\)    | 2 (1)\(^1\)      | -4 (-4)\(^1\)   |
| Finland          | 13 (8)\(^1\)   | 9 (-3)\(^1\)     | -2 (-1)\(^1\)   |
| France           | 12 (11)\(^1\)  | 1 (-2)\(^1\)     | 1 (0)\(^1\)     |
| Germany          | 15 (13)\(^1\)  | 12 (4)\(^1\)     | -1 (-1)\(^1\)   |
| Greece           | 31 (24)\(^1\)  | 12 (-1)\(^1\)    | 4 (4)\(^1\)     |
| Hungary          | 8 (6)\(^1\)    | 4 (0)\(^1\)      | 5 (5)\(^1\)     |
| Ireland          | 13 (10)\(^1\)  | 9 (2)\(^1\)      | -4 (-4)\(^1\)   |
| Israel           | 9 (9)\(^1\)    | 3 (0)\(^1\)      | 0 (0)\(^1\)     |
| Italy            | 12 (8)\(^1\)   | 9 (2)\(^1\)      | 0 (0)\(^1\)     |
| Netherlands      | 14 (12)\(^1\)  | 7 (2)\(^1\)      | 0 (0)\(^1\)     |
| Norway           | 17 (16)\(^1\)  | 7 (4)\(^1\)      | 8 (8)\(^1\)     |
| Poland           | 4 (2)\(^1\)    | 1 (-4)\(^1\)     | -7 (-7)\(^1\)   |
| Portugal         | 13              | 3                | 0               |
| Romania          | 25 (20)\(^1\)  | 14 (5)\(^1\)     | 10 (10)\(^1\)   |
| Slovakia         | 7 (5)\(^1\)    | 7 (3)\(^1\)      | -4 (-5)\(^1\)   |
| Slovenia         | 9 (9)\(^1\)    | 3 (1)\(^1\)      | -4 (-2)\(^1\)   |
| South Africa     | 3 (2)\(^1\)    | 1 (0)\(^1\)      | -3 (-3)\(^1\)   |
| Spain            | 8 (6)\(^1\)    | 6 (1)\(^1\)      | 1 (1)\(^1\)     |
| Sweden           | 13 (10)\(^1\)  | 8 (1)\(^1\)      | -4 (-5)\(^1\)   |
| Switzerland      | 4 (3)\(^1\)    | 0 (-2)\(^1\)     | -4 (-4)\(^1\)   |
| Turkey           | 15 (11)\(^1\)  | 10 (0)\(^1\)     | 10 (10)\(^1\)   |
| UK               | 5 (4)\(^1\)    | 4 (2)\(^1\)      | 1 (1)\(^1\)     |

1. 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 – Americas

Almost 23,000 employers in North, Central and South America were interviewed for the ManpowerGroup survey on hiring plans for the second quarter of 2020. In nine of the 10 Americas countries, employers anticipate job gains during the coming quarter.

For the tenth consecutive quarter, employers in the United States report the strongest hiring prospects in the region. U.S. hiring sentiment is unchanged both quarter-over-quarter and year-over-year, and payrolls are expected to increase in all 12 industry sectors during the April to June period. The strongest sector labour markets are anticipated in the Leisure & Hospitality sector, the Transportation & Utilities sector and the Wholesale & Retail Trade sector.

While Canadian employers expect some hiring opportunities in the next three months, they report their weakest Outlook in two years. Job gains are expected in all 10 industry sectors, but hiring prospects dip in six sectors when compared with the first quarter of 2020 and this time last year. In Western Canada, employers anticipate the weakest hiring pace in four years.

In Mexico, employers expect the moderate hiring pace to continue in the second quarter of 2020, although hiring sentiment remains weaker in comparison with last year at this time. With job gains forecast in all seven industry sectors, the strongest hiring pace is anticipated by Commerce sector employers. However, Mining & Extraction sector employers report the weakest hiring plans in three years.

Employers in two of the three Central American countries surveyed report an improved hiring climate in comparison with the first quarter of 2020. In Costa Rica, employers report a recovery from the weak forecast reported three months ago, with quarter-over-quarter and year-over-year improvements driven by stronger hiring plans in the Services and Manufacture sectors. The Guatemalan Outlook also strengthens when compared with the first quarter of 2020, buoyed by improved hiring prospects in the Manufacturing sector.

Meanwhile, employers continue to report subdued hiring plans in Panama. Employers expect to trim payrolls in four of the country’s six industry sectors during the next three months – including the Construction and Manufacturing sectors – although Services sector employers report an uptick in hiring activity.

In South America, Brazilian employers report the strongest forecast since the end of 2013, fuelled by an upbeat hiring pace in the Manufacturing and Services sectors, where hiring plans are the strongest in five years. Noteworthy improvements are reported in the São Paulo City and Great São Paulo labour markets both quarter-over-quarter and year-over-year.

Argentine employers report a slight improvement in hiring plans, anticipating slow-paced workforce gains during the coming quarter. Outlooks improve in eight of nine industry sectors when compared with the prior quarter, including the Construction sector where employers report their strongest forecast in two years.

The favourable hiring climate is expected to continue in Colombia during the April to June period. Payroll gains are anticipated in all nine industry sectors and all five regions in the upcoming quarter. In Peru, employers continue to expect modest job gains. The labour market is likely buoyed by the strongest Construction sector Outlook in three years and a moderate strengthening of hiring plans in the Mining sector after the dip last quarter.
Argentina

Brazil

Canada

Colombia

ManpowerGroup Employment Outlook Survey
Costa Rica

Seasonally Adjusted Outlook
Net Employment Outlook
No bar indicates Net Employment Outlook of zero

Guatemala

Seasonally Adjusted Outlook
Net Employment Outlook
No bar indicates Net Employment Outlook of zero

Mexico

Seasonally Adjusted Outlook
Net Employment Outlook
No bar indicates Net Employment Outlook of zero

Panama

Seasonally Adjusted Outlook
Net Employment Outlook
No bar indicates Net Employment Outlook of zero

Panama joined the survey in Q2 2010

+9 (+8)%

+11 (+10)%

+10 (+9)%

-1 (0)%
Peru

Seasonally Adjusted Outlook

Net Employment Outlook

United States of America

Seasonally Adjusted Outlook

Net Employment Outlook

No bar indicates Net Employment Outlook of zero

Peru: +7 (+5)%

United States of America: +20 (+19)%
International Comparisons – Asia Pacific

More than 14,000 employers in seven Asia Pacific countries and territories were interviewed for ManpowerGroup’s survey of employer hiring intentions in Quarter 2 2020. In all seven countries and territories, employers expect to add to payrolls during the next three months.

In Japan, employers continue to anticipate healthy hiring activity, reporting a relatively stable forecast when compared with the first quarter of 2020. Mining & Construction sector employers report the strongest sector Outlook for the fifth consecutive quarter, and the brisk hiring pace anticipated by Transportation & Utilities sector employers reflects a quarter-over-quarter uptick in hiring plans. However, hiring sentiment weakens slightly when compared with this time one year ago, decreasing in all seven industry sectors.

Taiwanese employers anticipate an active labour market in the second quarter of 2020, matching the Outlook reported in Japan. Employers in the Construction sector in part fuel the optimistic hiring prospects, reporting the strongest forecast in four years, and solid job gains are also anticipated in the Services sector.

In the region’s largest labour market, Chinese employers expect the mild hiring pace to continue in the coming quarter, reporting an unchanged Outlook both quarter-over-quarter and year-over-year. Hiring plans improve in four of China’s six industry sectors when compared with the first quarter of 2020, with the strongest hiring prospects reported in the Services sector.

Hong Kong employers report uncertain hiring prospects for the next three months, with their weakest forecast in 10 years. Hiring sentiment weakens in all six of Hong Kong’s industry sectors when compared with both the prior quarter and last year at this time, including the Manufacturing sector where employers expect to trim payrolls during Quarter 2 2020.

Australian employers expect a moderate hiring pace in the coming quarter, driven in part by positive hiring activity in the Services sector. However, the country’s Outlook dips to its weakest point in three years, reflecting limited hiring plans in the Transportation & Utilities sector, which sink to a level last reported in 2009.

In Singapore, employers report unchanged hiring intentions when compared with the prior quarter, expecting the fair hiring pace to continue in Quarter 2 2020. Services sector employers report improved hiring plans quarter-over-quarter, forecasting the strongest of the seven sector labour markets.

India’s Outlook for the coming quarter reflects hopeful hiring intentions in all four regions, and employers in all seven Indian industry sectors anticipate stronger hiring activity than the previous quarter. The favourable forecast is buoyed by positive hiring sentiment in the Mining & Construction, Services and Wholesale & Retail Trade sectors.
Japan

+29 (+24)%

Singapore

+9 (+9)%

Taiwan

+24 (+24)%
International Comparisons – EMEA

For the second quarter of 2020, more than 21,000 employers in Europe, Middle East and Africa (EMEA) region were surveyed by ManpowerGroup. In all 26 EMEA countries, employers expect to increase payrolls between April and June 2020.

Employers in all four of Europe’s largest economies report positive hiring expectations for the upcoming quarter. The strongest of the four Outlooks is reported in Germany where employers anticipate a steady hiring pace, with hiring plans strengthening in five of the seven German industry sectors in comparison with the prior quarter. The strongest labour markets are forecast by employers in the Finance & Business Services and Construction sectors.

In France, employers continue to anticipate respectable job gains, driven in part by upbeat hiring plans for the Construction sector. Employers in the UK report some encouraging signs for job seekers in the coming quarter, including a cautiously optimistic forecast in the Finance & Business Services sector.

Italian employers match their strongest hiring intentions since the survey began 17 years ago, anticipating a fair hiring pace in the next three months. Job gains are anticipated in all seven of Italy’s industry sectors, with the strongest hiring plans reported in the Wholesale & Retail Trade sector.

Elsewhere in Western Europe, Dutch employers expect the favourable hiring climate to continue during the second quarter of 2020, reporting respectable hiring plans in the Finance & Business Services, Manufacturing and Wholesale & Retail Trade sectors. Hiring sentiment also remains relatively stable in Belgium, in part buoyed by a hopeful Manufacturing sector where employers report their strongest Outlook in 11 years. Positive hiring plans are also reported for the Construction sector.

In the Nordic region, Norwegian employers report the strongest hiring prospects in eight years, anticipating payroll gains in all seven industry sectors and all five regions. Employers in the Construction sector anticipate a booming labour market, and the Outlook for the Finance & Business Services sector is the strongest in four years. In Sweden, employers report cautiously optimistic hiring sentiment for the coming quarter. Hiring prospects strengthen both quarter-over-quarter and year-over-year in the Finance & Business Services and Restaurants & Hotels sectors.

The weakest hiring pace in seven years is anticipated in Poland during the second quarter of 2020, with employers in six of the seven sectors expecting weaker forecasts than this time last year. Elsewhere in Eastern Europe, Romanian employers report a strengthening labour market, with Outlooks improving in six of seven industry sectors in comparison with the prior quarter. Hiring intentions are strongest in the Construction and Finance & Business Services sectors, while the Restaurants & Hotels sector Outlook is the strongest in 11 years.

The Outlook for Croatia is one of the four strongest globally in the ManpowerGroup survey for Quarter 2 2020, matching Japan, Taiwan and Greece. The optimistic Croatian Outlook is partially fuelled by a brisk hiring pace for the Restaurants & Hotels sector. In Greece, employers continue to forecast active hiring intentions, driven in part by robust hiring plans in the Finance & Business Services sector.
Austria

+10 (+8)%

Belgium

+13 (+13)%

Bulgaria

+10 (+6)%

Croatia

+24%
Czech Republic

+5 (+5)%

Finland

+13 (+8)%

France

+12 (+11)%

Germany

+15 (+13)%
Portugal

Net Employment Outlook

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

Romania

Net Employment Outlook

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

Slovakia

Net Employment Outlook

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

Slovenia

Net Employment Outlook

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

Legend:

+13%

+25 (+20)%

+7 (+5)%

+9 (+9)%
Turkey

Net Employment Outlook  Seasonally Adjusted Outlook

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

United Kingdom

Net Employment Outlook  Seasonally Adjusted Outlook

No bar indicates Net Employment Outlook of zero
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 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 2 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 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%.

The margin of error for the Canadian survey is +/- 2.2%.

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.
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 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 Fortune’s Most Admired Companies for the seventeenth year and one of the World’s Most Ethical Companies for the eleventh year, confirming our position as the most trusted brand in the industry. See how ManpowerGroup is powering the future of work: www.manpowergroup.com

About ManpowerGroup Canada

With nearly 30 offices strategically located across the country, ManpowerGroup Canada’s staffing services include administrative, industrial, skilled trades and contact centre personnel as well as the assignment of contract professionals in information technology, scientific, finance, engineering, telecommunications and other professional areas under the Experis brand. More information can be found on the following websites, manpower.ca and experis.ca

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