

MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

Data for the second quarter of 2022



ManpowerGroup®



EXECUTIVE SUMMARY

- **Strong hiring optimism continues into the second quarter of 2022, according to the latest ManpowerGroup Employment Outlook Survey of more than 41,000 employers across 40 countries and territories.** Net gains to staffing levels are anticipated by employers in all countries except Greece, forecasting a slight decrease (-2%).
- Net Employment Outlook (NEO) for Poland reached the level of +5%. The result is still optimistic, but in the quarter-to-quarter comparison it weakened by 16 percentage points. When compared to the previous year, Outlook decreased by 3 percentage points.
- The ManpowerGroup Employment Outlook Survey for the second quarter of 2022 was conducted by interviewing a representative sample of 517 employers in Poland.
- 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 2022, as compared to the current quarter?”
- 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.

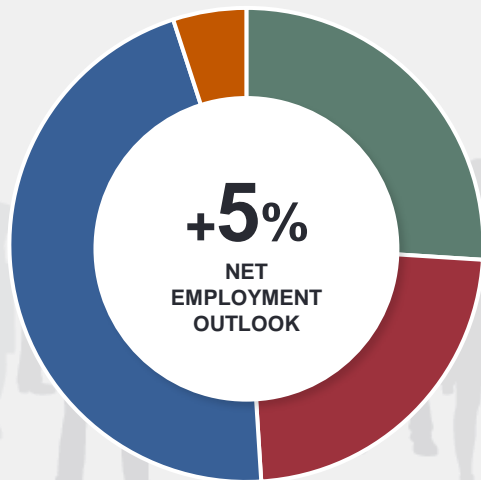
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Poland Employment Outlook

Polish employers declare cautious, but still optimistic hiring prospects for the second quarter of 2022. 26% of organizations intend to expand their teams, while 23% forecast the job cuts. 46% of companies plan to keep the number of employees unchanged, and 5% are undecided. **Once the data is adjusted to allow for seasonal variation, the Net Employment Outlook stands at +5%.**



26% PLAN TO HIRE

23% EXPECT TO LAY OFF WORKERS

46% PLAN TO KEEP WORKFORCE LEVELS STEADY

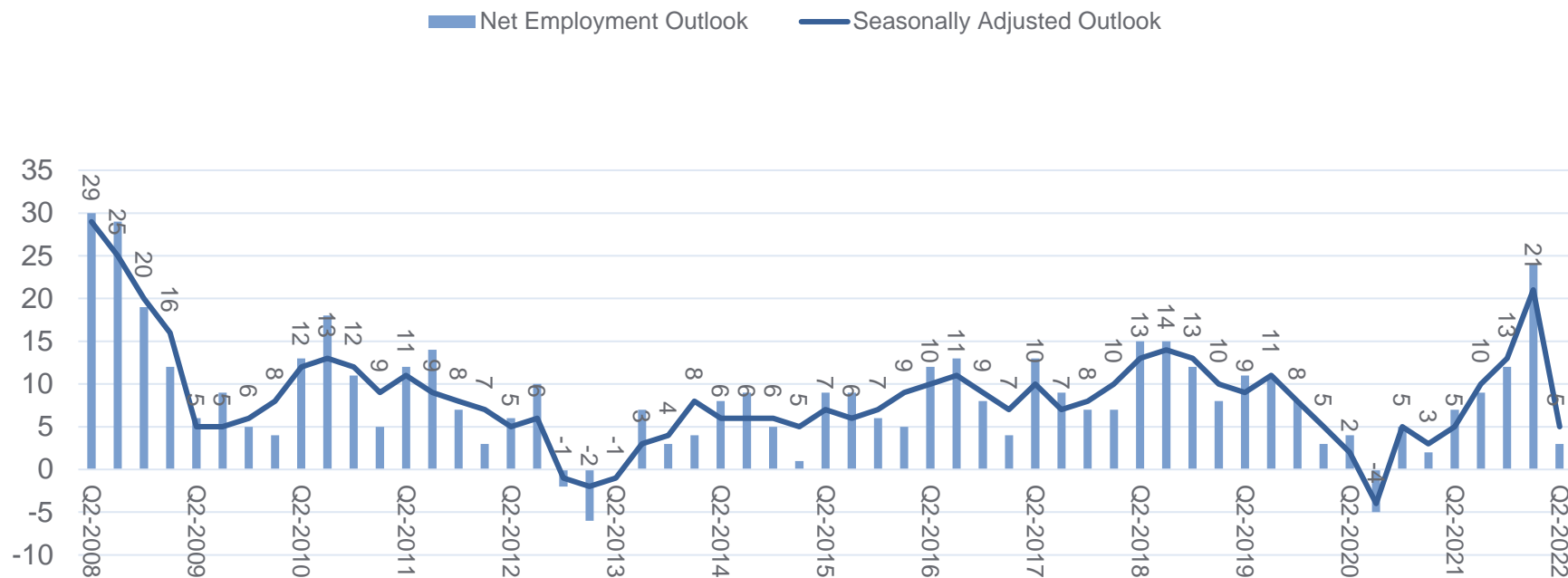
5% UNDECIDED

Poland Employment Outlook

In the quarter-to-quarter comparison NEO for Poland weakened by 16 percentage points. When compared to the previous year, the Outlook decreased by 3 percentage points.



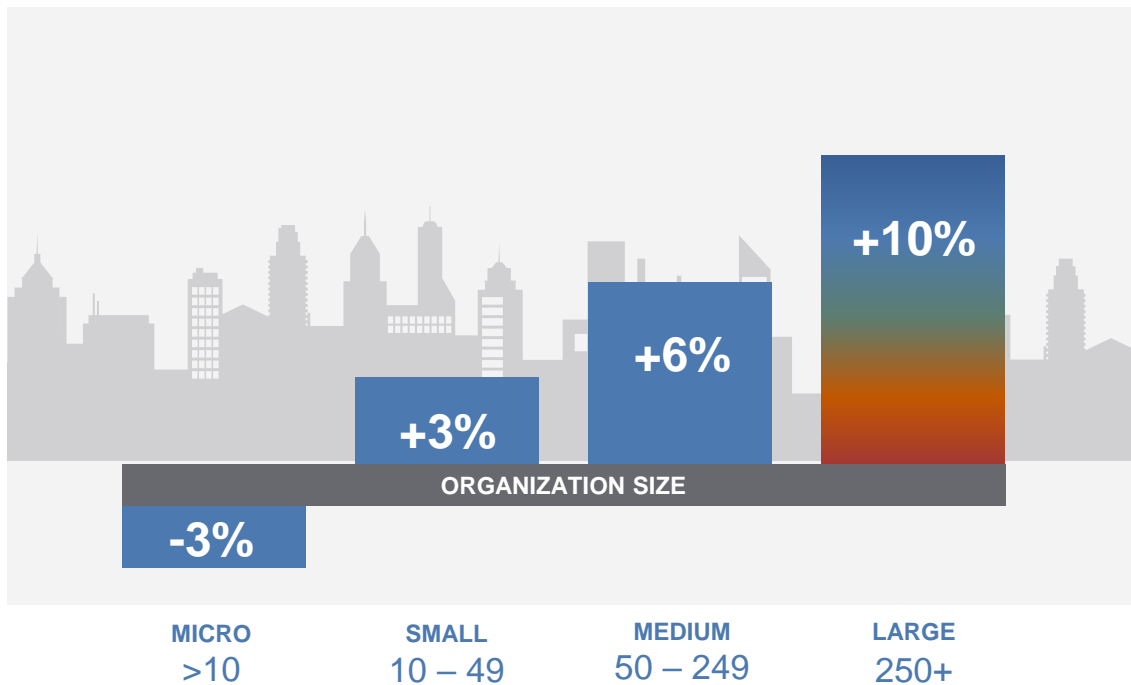
Poland Employment Outlook



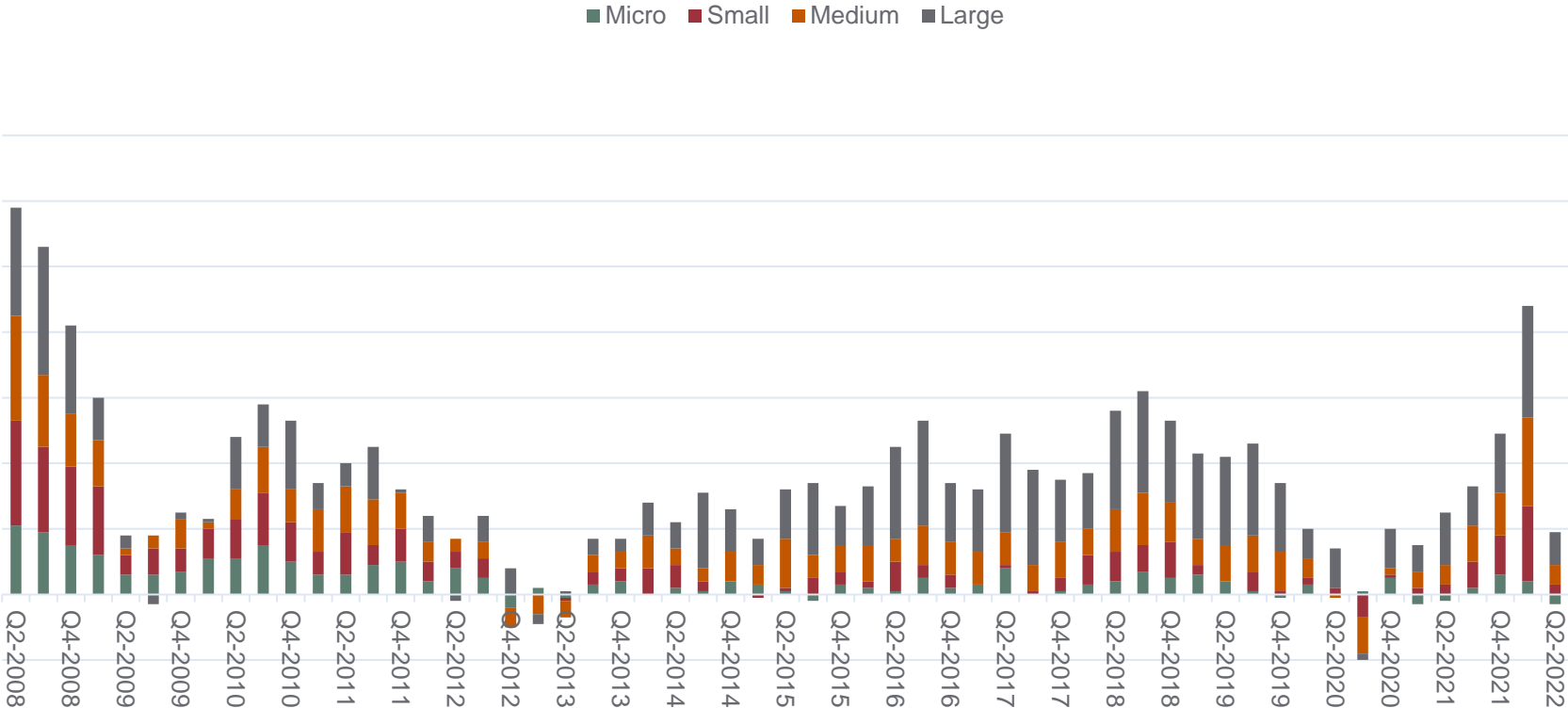
Organization Size Comparisons

In the second quarter of 2022 companies in 3 out of 4 organization sizes expect workforce gains.

The strongest hiring sentiment is declared by Large employers, with the Outlook of +10%. Small and Medium companies also intend to expand their teams, reporting the NEO of +3% and +6%, respectively. Micro organizations, however, plan to reduce employment and present the Outlook of -3%.

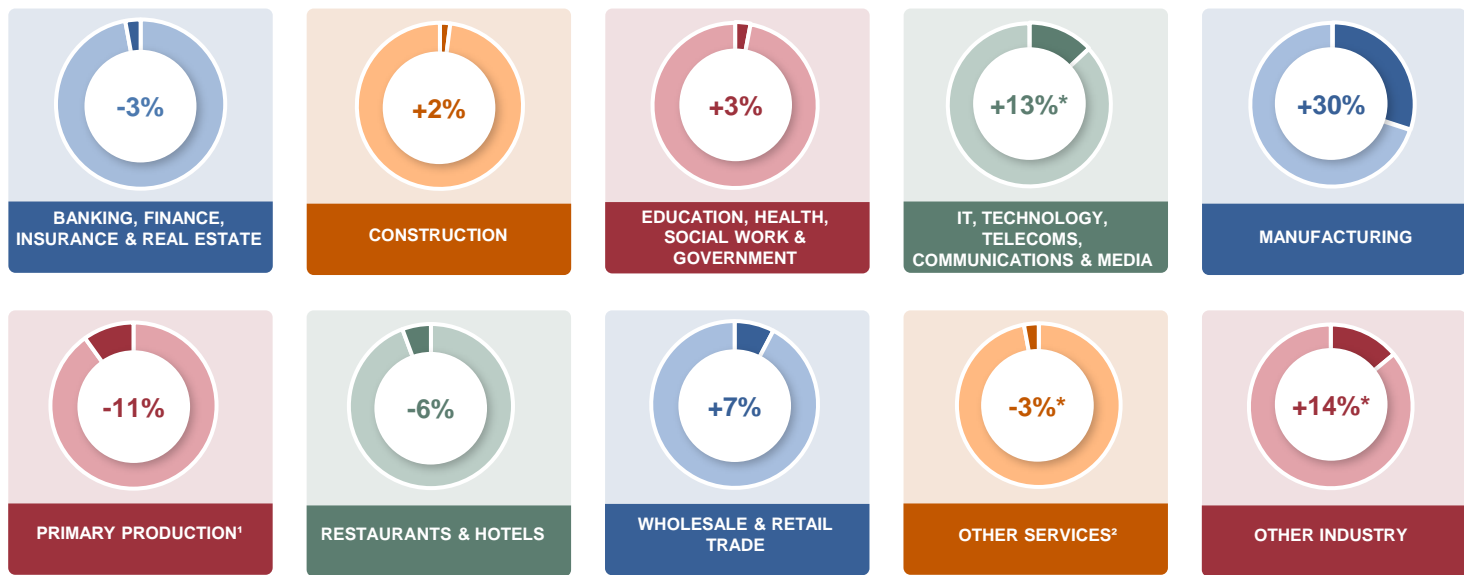


Organization Size Comparisons



Sector Comparisons

In the II quarter of 2022, a positive hiring climate is expected in 6 out of 10 polish sectors. The highest demand for new talents is forecast by organizations representing Manufacturing, with the NEO of +30%. Representatives of Restaurants & Hotels and Primary production predict dismissal of employees, presenting the lowest Outlooks of -6% and -11%, respectively.

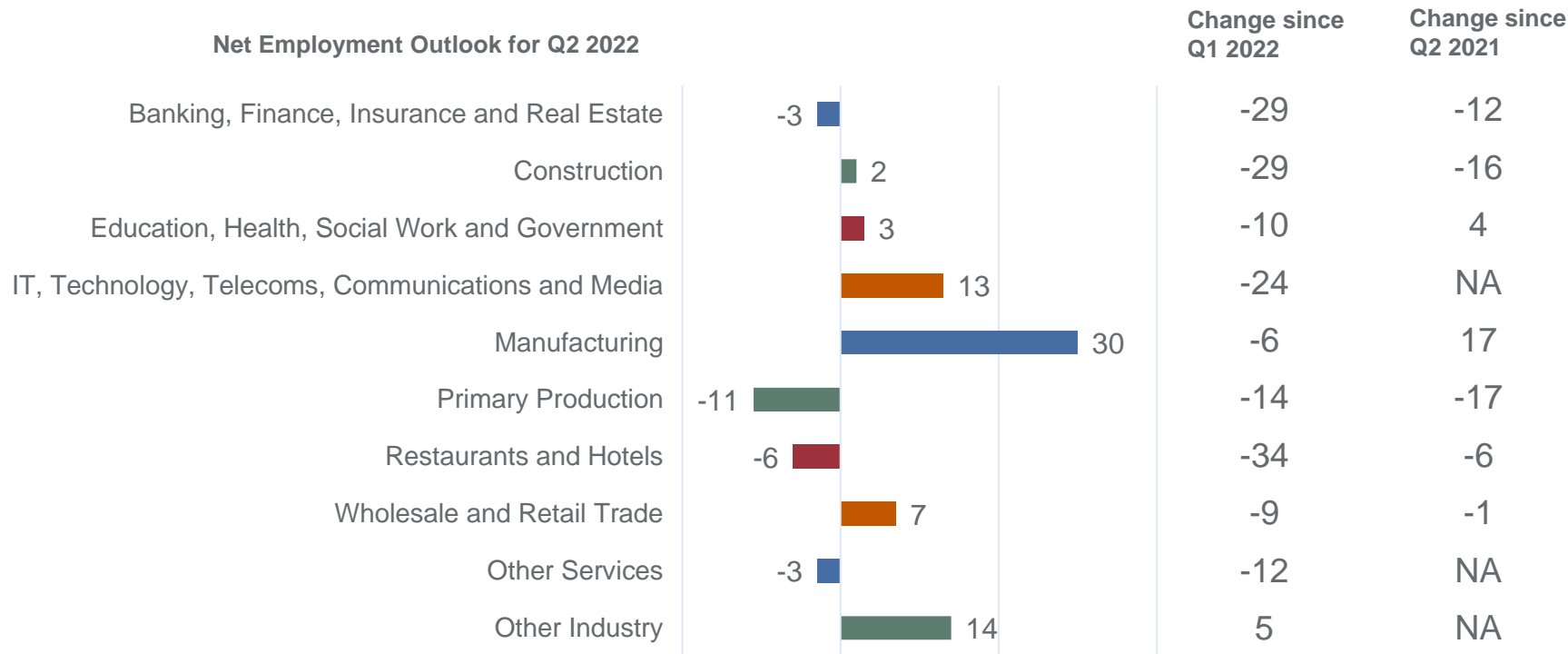


* Data with no seasonal adjustment

1. Primary production: Agriculture, Forestry and Fishing; Mining and Quarrying; Electricity; Gas and Air Conditioning Supply; Water Supply; Sewerage, Waste Management and Remediation Activities.

2. Other services: Professional, Scientific and Technical Activities; Administrative and Support Services; Other Service Activities.

Sector Comparisons

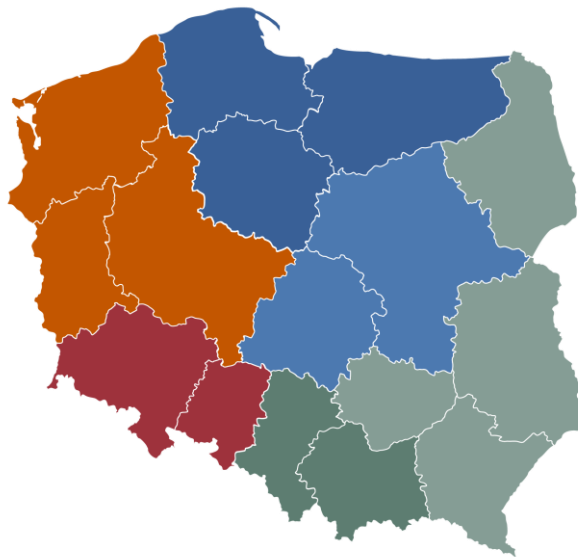


NA – Unavailable data

Regional Comparisons

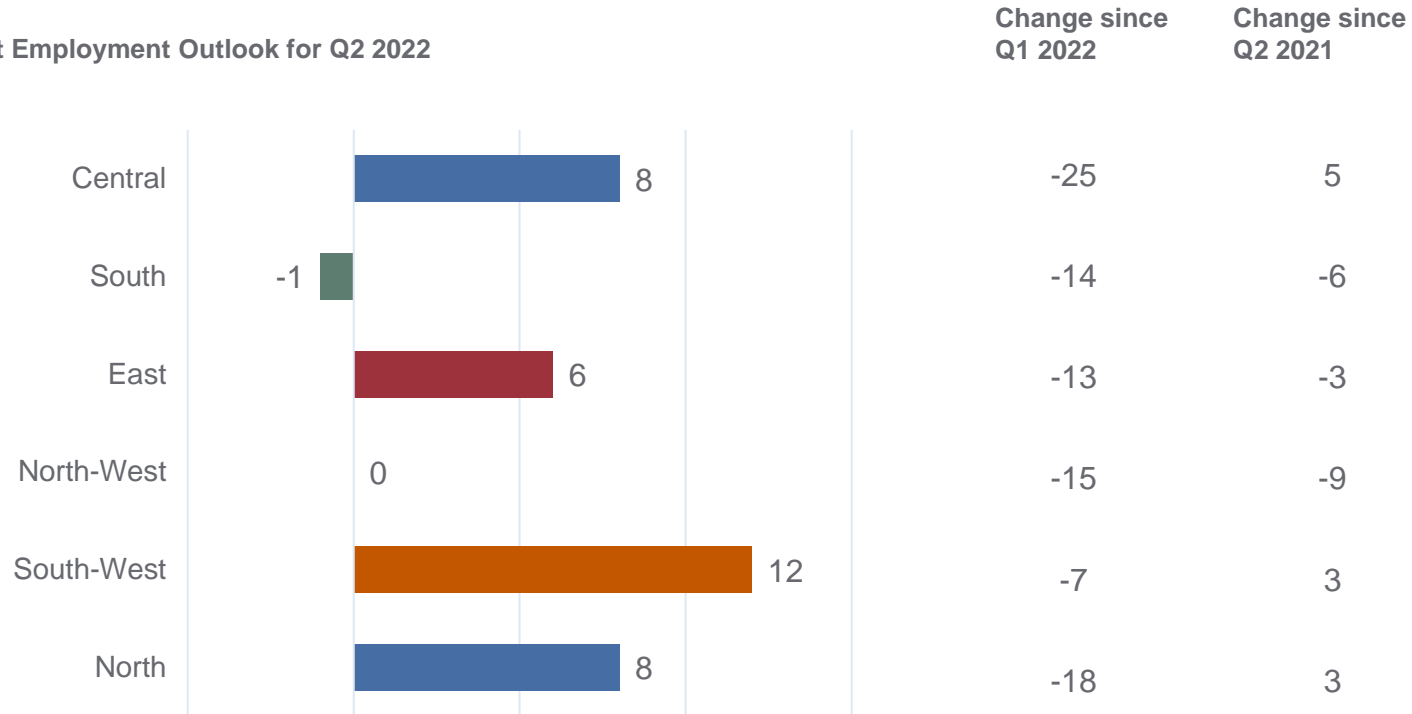
Between April and June employers plan to expand their teams in 4 out of 6 Polish regions. When compared with the results from the prior quarter, in all 6 Polish regions the Outlooks declined. In the year-to-year comparison, hiring prospects weakened in 3 regions and improved in 3.

Central	+8%
South	-1%
East	+6%
North-West	0%
South-West	+12%
North	+8%



Regional Comparisons

Net Employment Outlook for Q2 2022



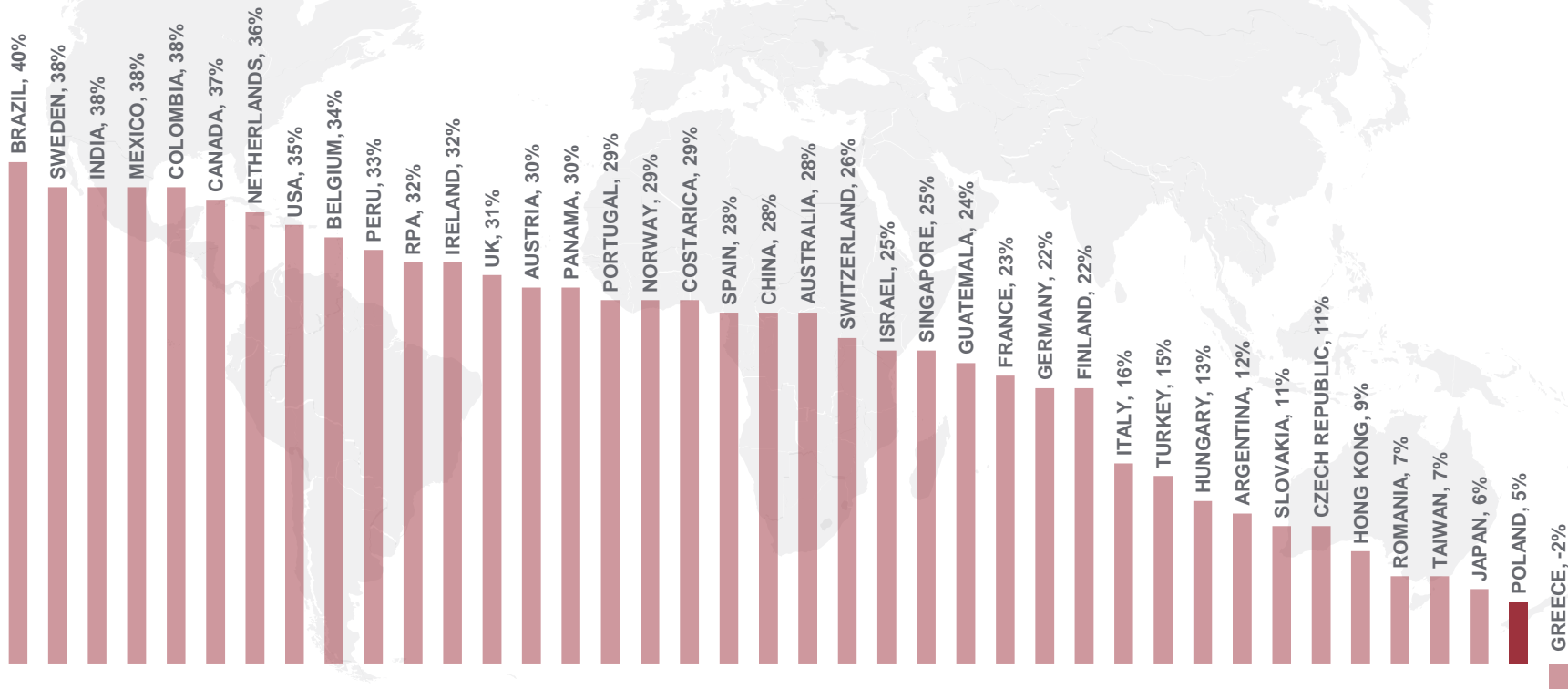


Q1 EMPLOYMENT OUTLOOKS

Globally, the Net Employment Outlook reached the level of +29%. Companies in 39 out of 40 surveyed countries intend to expand their teams during the second quarter of 2022. Only Greece forecast a reduction of employment, with the Outlook of -2%.



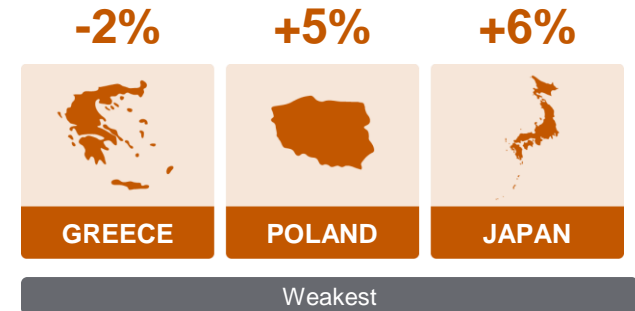
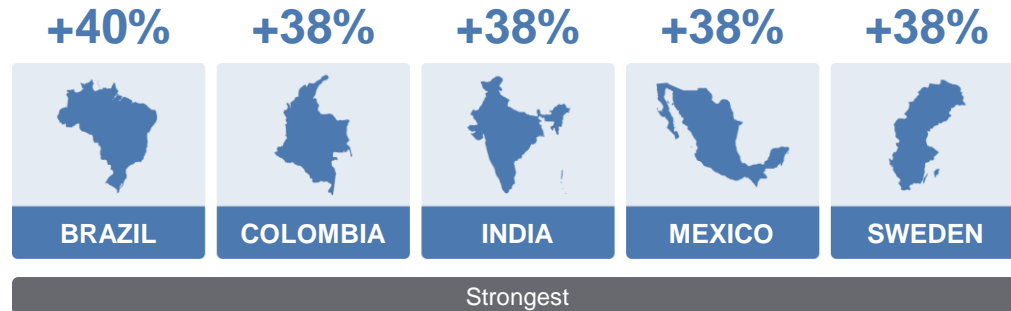
Employment prospects globally



The weakest and the strongest hiring prospects globally

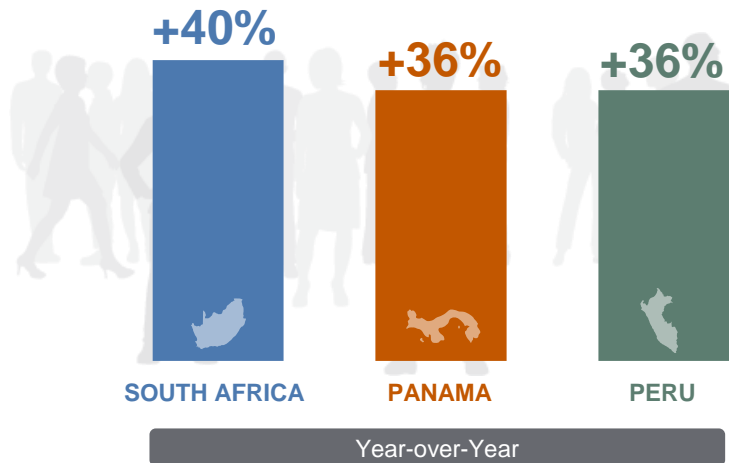
With strong outlooks across the regions, employers in North America (+38%) reported the most positive outlook followed by South and Central America (+35%), APAC (+28%) and EMEA (+22%).

Countries With the Strongest & Weakest Hiring Prospects for Q2 2022:

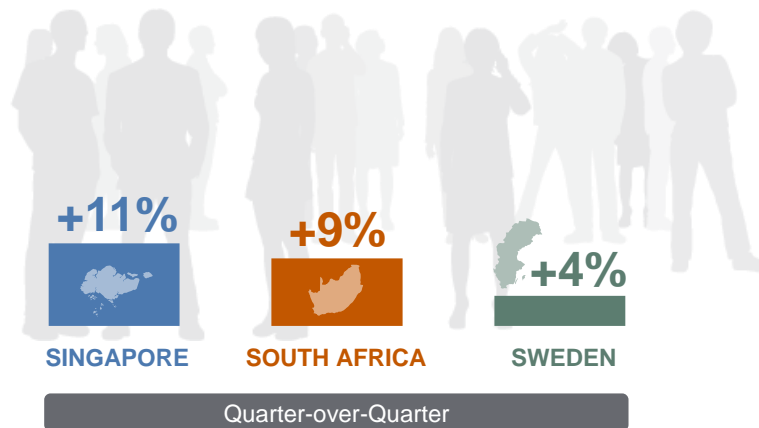


Hiring prospects globally – comparison

The strongest year-over-year improvements are reported in South Africa (+40%), Panama (+36%), and Peru (+36%).



The strongest quarter-over-quarter improvements are reported in Singapore (+11%), South Africa (+9%), and Sweden (+4%).



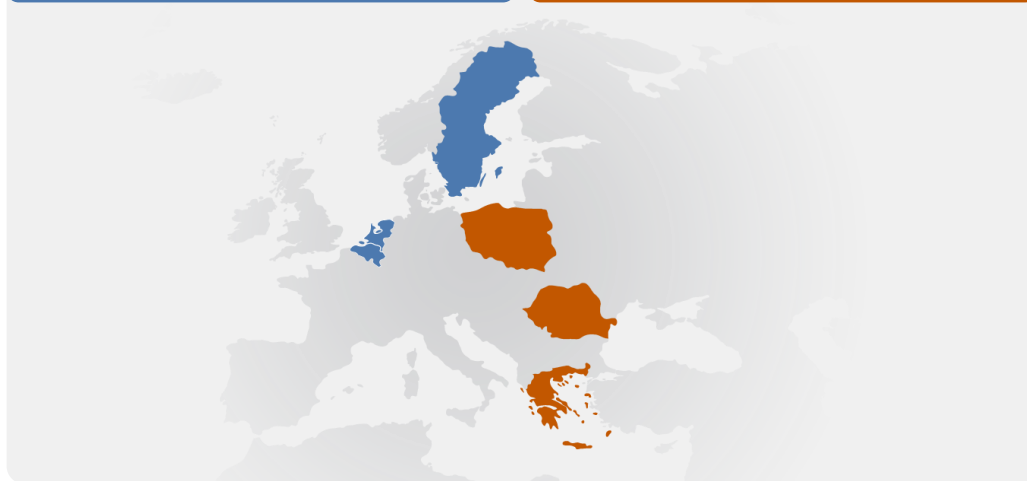
Hiring intentions in EMEA

Compared with Q1 2022, hiring intentions improve in 2 countries, decline in 20, while remaining unchanged in 1, Belgium.

Across 23 countries in the Europe, Middle East and Africa (EMEA) region, ManpowerGroup interviewed more than 16,000 employers for the survey of hiring prospects for the second quarter of 2022.

STRONGEST HIRING INTENTIONS:
Sweden (+38%), the Netherlands (+36%),
and Belgium (+34%)

WEAKEST HIRING INTENTIONS:
Greece (-2%), Poland (+5%),
and Romania (+7%)



Hiring intentions in North, Central & South America

Workforce gains are forecast for all 10 countries in North, Central and South America. Outlooks improving in 2 quarter-over-quarter and all 10 compared to this time last year.

ManpowerGroup interviewed more than 14,000 employers in 10 countries in North, Central and South America on hiring prospects for the second quarter of 2022.

STRONGEST HIRING INTENTIONS:

Brazil (+40%), Colombia (+38%),
and Mexico (+38%)

WEAKEST HIRING INTENTIONS:

Argentina (12%), Guatemala (+24%),
and Costa Rica (+29%)



Hiring intentions in Asia & Pacific

Hiring sentiment strengthens in 2 countries and territories quarter-over-quarter (China and Singapore), while weakening in 5.

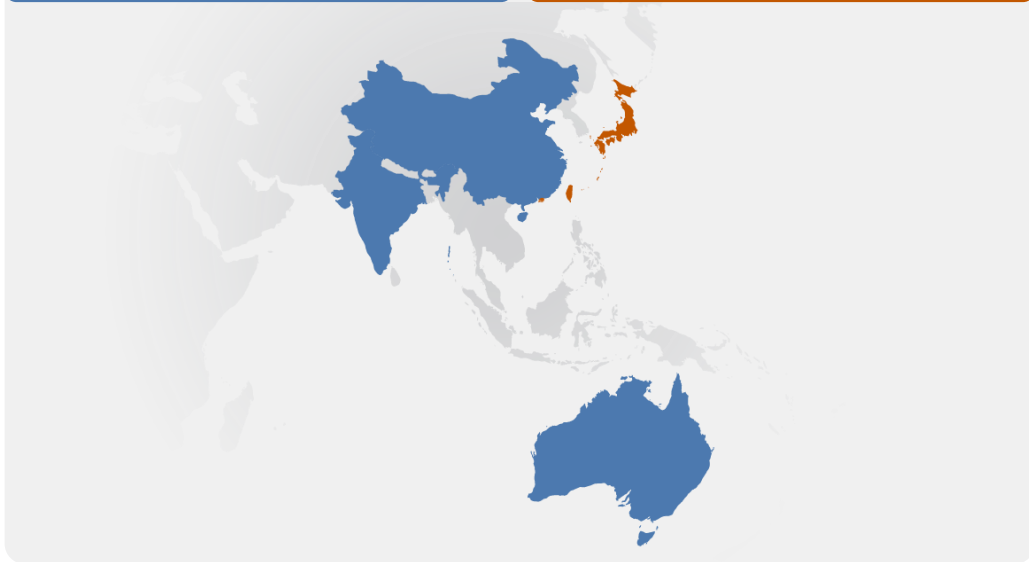
In the ManpowerGroup Employment Outlook Survey for the second quarter of 2022, almost 10,000 employers were interviewed across 7 Asia-Pacific countries and territories about hiring plans for the upcoming quarter.

STRONGEST HIRING INTENTIONS:

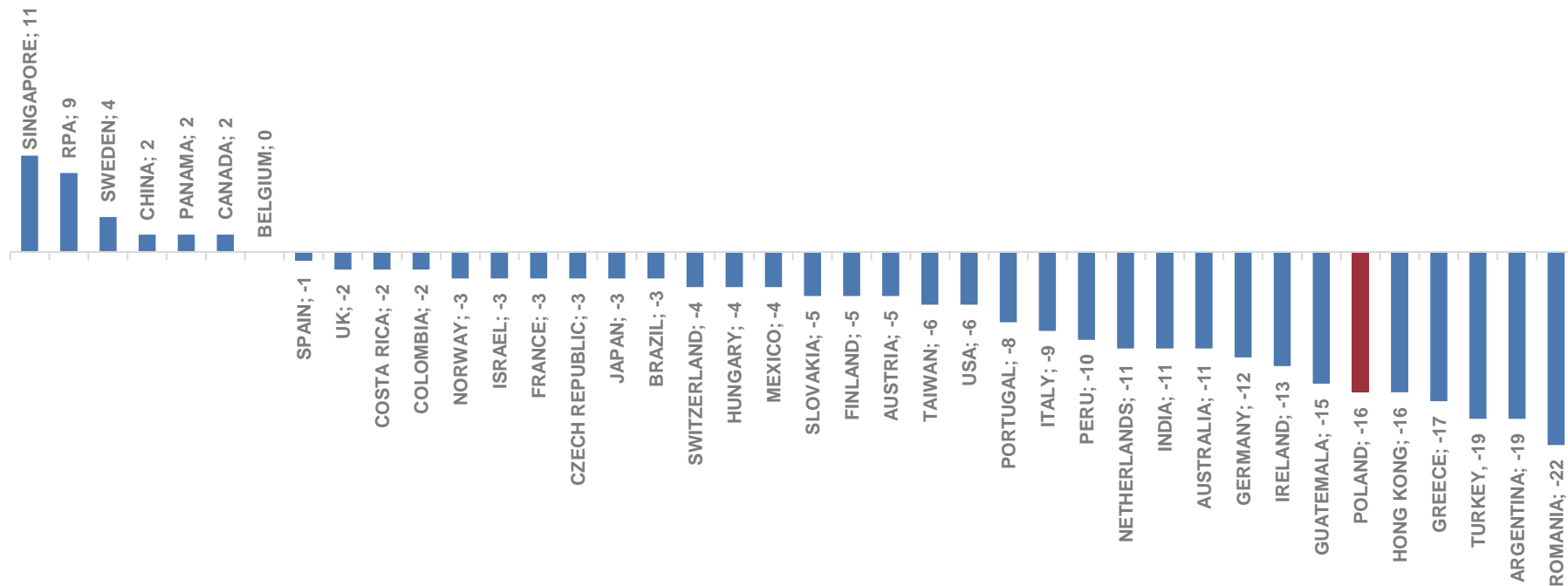
India (+38%), Australia (+28%)
and China (+28%)

WEAKEST HIRING INTENTIONS:

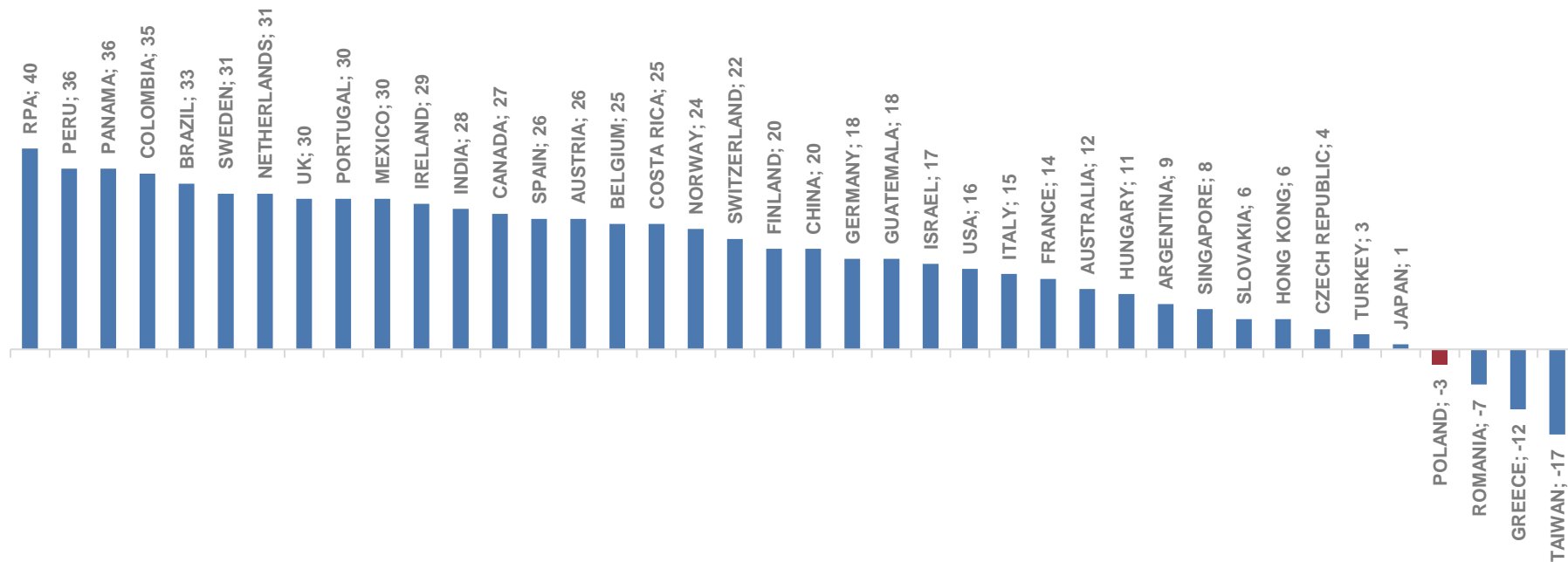
Japan (+6%), Taiwan (+7%)
and Hong Kong (+9%)



Countries' QOQ Confidence Change

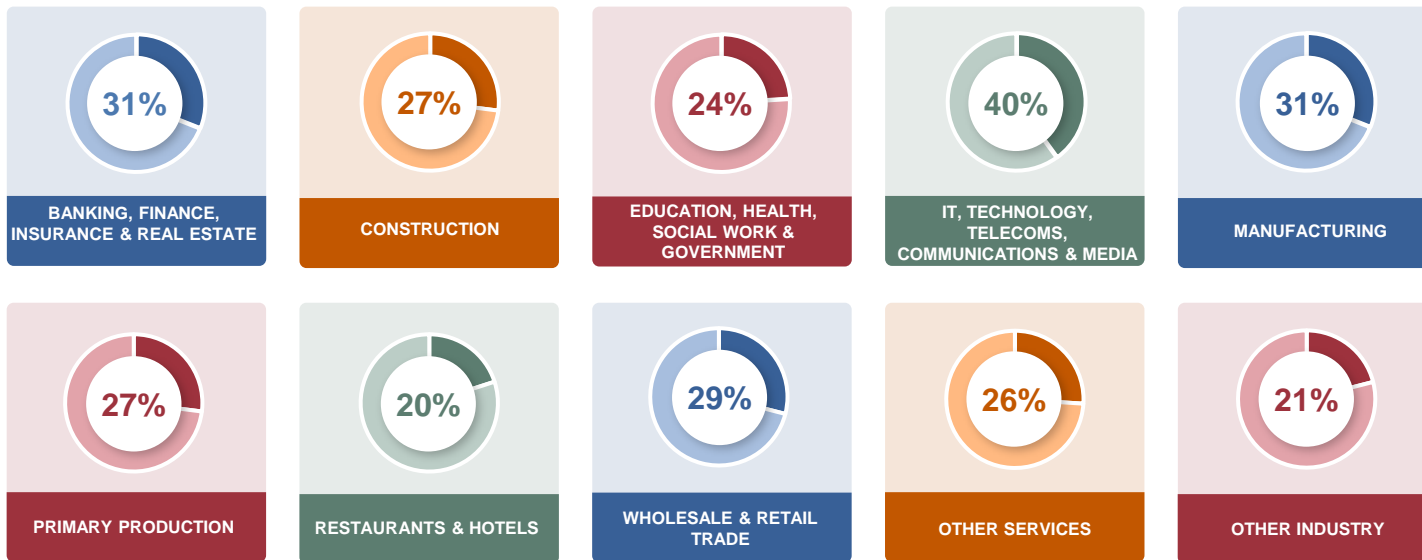


Countries' YOY Confidence Change



Hiring prospects across 10 industries globally

Globally, the highest Net Employment Outlook is presented by companies in IT, Technology, Telecoms, Communication & Media sector (+40%). The lowest hiring intentions are declared by representatives from the Restaurants & Hotels (+20%).





ABOUT THE MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

About the ManpowerGroup Employment Outlook Survey

The ManpowerGroup Employment Outlook Survey – conducted in January 2022 – is the most comprehensive, forward-looking employment survey of its kind, used globally as a key economic indicator. 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. Running since 1962, various factors underpin the success of the Survey:

Unique

It is unparalleled in its size, scope, longevity and area of focus. 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 more than 41,000 public and private employers across 40 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 six decades the survey has derived all of its information from a single question: "How do you anticipate total employment at your location to change in the three months to the end of June 2022 as compared to the current quarter?"

Survey Methodology

The methodology used to collect the data for the Employment Outlook has been digitized in 40 markets for the Q2 2022 report. Respondents in prior quarters were contacted via telephone. With the shift to remote working and much higher reliance on the internet, responses are now being collected online.

Respondents are members of double opt in online panels and are incentivized to complete the survey. The question asked and the respondent profile remains unchanged. Size of organization and sector are standardized across all countries to allow international comparisons.

EXPLORE THE DATA