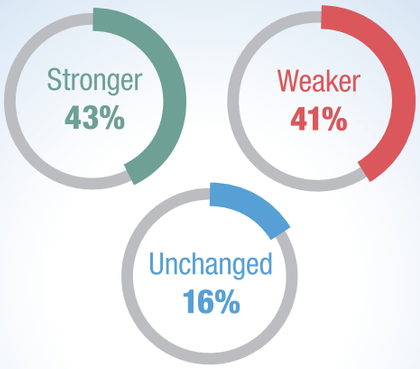
Q3 2018 MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

WHERE are hiring plans strongest? are hiring plans weakest?

How are employer hiring plans changing?

QUARTER-OVER-QUARTER

Compared to 44 countries & territories surveyed for Q2 2018

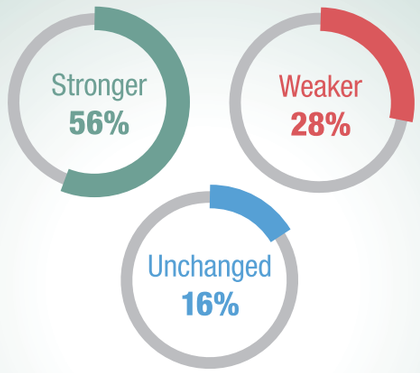


Notable Shifts

ISRAEL	4%
SWITZERLAND	3%
CHINA	2%
NETHERLANDS	4%
PERU	3%
NEW ZEALAND	3%

YEAR-OVER-YEAR

Compared to 43 countries & territories surveyed for Q3 2017



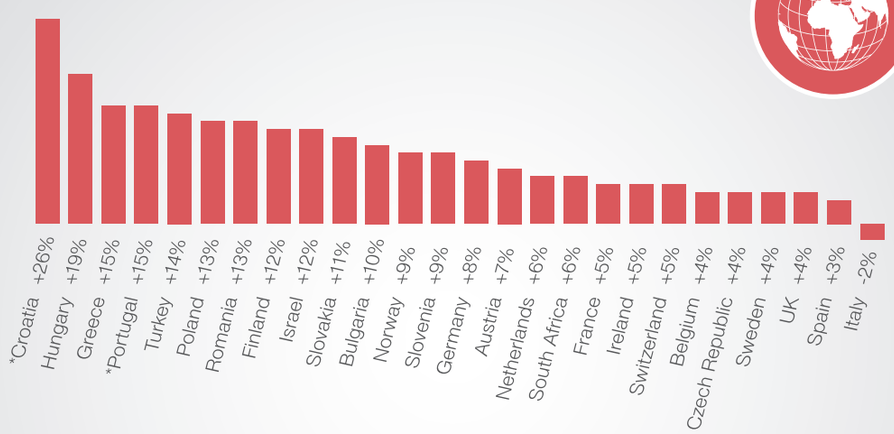
Notable Shifts

SINGAPORE	9%
FINLAND	8%
CANADA	4%
SWEDEN	7%
COLOMBIA	5%
NEW ZEALAND	5%

Net Employment Outlooks

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

EMEA



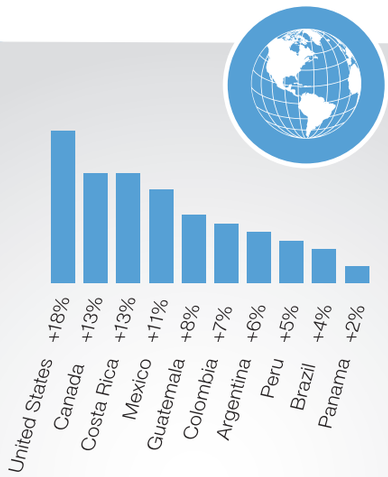
- Staffing levels are forecast to grow by varying levels in 25 of 26 countries. Employers in Italy report the only negative hiring intentions for Q3.
- Compared to the prior quarter, hiring prospects improve in 12 of the 26 countries, decline in 10 and are unchanged in 4. When compared to Q3 2017, and where comparative data is available,† hiring plans strengthen in 13 countries, decline in 6 and are unchanged in 6.
- Based on unadjusted data, the strongest hiring plans are reported in Croatia.

**Survey results for both Croatia and Portugal are not seasonally adjusted.*

ASIA PACIFIC

- Employers expect payrolls to grow by varying levels in all 8 Asia Pacific countries and territories.
- When compared with Q2, stronger hiring prospects are reported in 5 countries/territories, weaken in 2 and are unchanged in 1.
- Year-over-year, hiring intentions improve in 6 countries and territories, decline in 1 and remain unchanged in 1.
- Employers in Japan expect the strongest hiring pace in Q3.

AMERICAS



- Staffing levels are forecast to grow in all 10 countries.
- Compared to Q2, Outlooks improve in only 2 countries, decline in 6 and are unchanged in 2.
- In a year-over-year comparison, hiring plans strengthen in 5 countries and weaken in the remaining 5.
- For the third consecutive quarter, U.S. employers report the region's strongest hiring plans.

†Croatia joined the survey in the prior quarter and has no year-over-year data for comparison

ManpowerGroup

ManpowerGroup Employment Outlook Survey Q3 2018
Complete survey details by country and territory available at www.manpowergroup.com/meos