

2025  
**Q3**

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**ManpowerGroup  
Employment Outlook Survey  
the Netherlands**





## Executive Summary

524 companies in the Netherlands were asked about their hiring intentions for the third quarter and the reasoning behind their decisions. Additionally, companies were asked about the impact of global trade uncertainty, an aging population and process automation on current and future hiring.

## 30% Net Employment Outlook

Calculated by subtracting employers planning reductions vs. those planning to hire\*. increased by 3 points since the previous quarter and by 2 points since Q3 2024.

**37%** of employers who plan to hire reported that their company is expanding in size, creating more positions.

## Highest Global Hiring Demand



Transport, Logistics and Automotive



Consumer Goods and Services



# Q3 Employment Outlooks

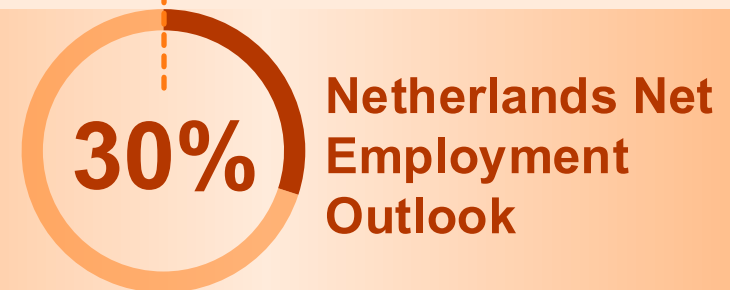
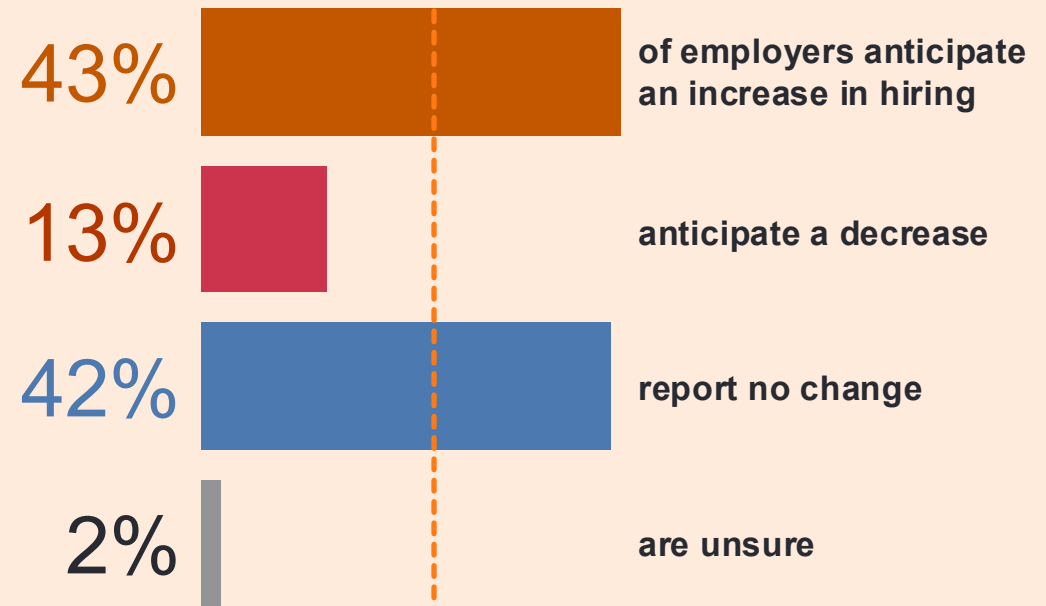




## Employment Outlook for Q3 2025

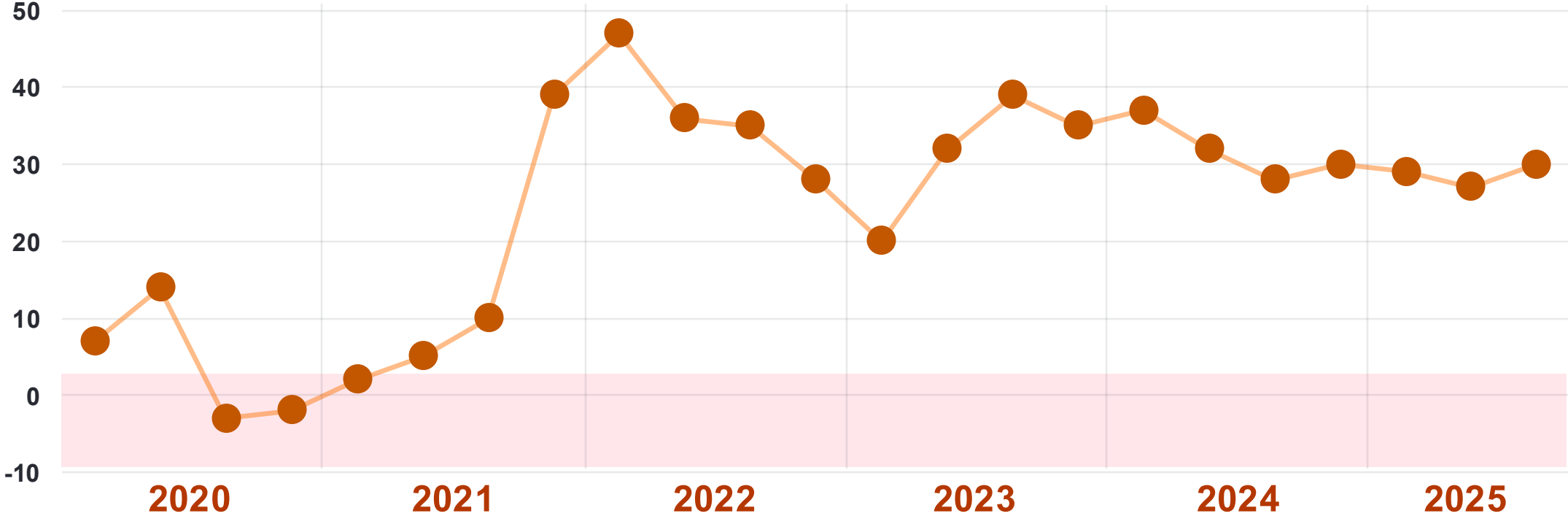
In the next quarter, employers expect a very strong Employment Outlook in the Netherlands with a Net Employment Outlook (NEO) of 30 points. The employment outlook has increased by 3 points compared to the previous quarter and 2 points year-over-year.

Dutch employers are more optimistic about an increase in hiring (+5%) compared to Q2 2025.



# Changes Over Time

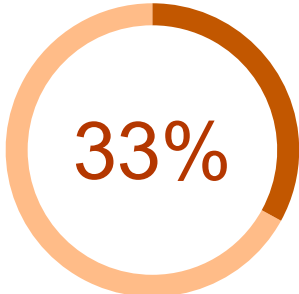
After a period of gradual decline throughout 2024 and into Q2 2025, the Net Employment Outlook in the Netherlands is showing signs of recovery. The outlook has increased by 3 points compared to the previous quarter and by 2 points year-over-year, indicating a potential shift toward renewed employer confidence and hiring intent.



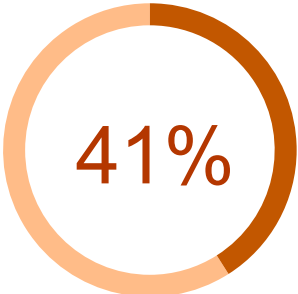
# Hiring Expectations by Company Size

One of the most competitive organization sizes in the Netherlands is small businesses with 10–49 employees, reporting a Net Employment Outlook (NEO) of 41, showing an increase of 3 points compared to the previous quarter and 7 points year-over-year. Organizations with 50-249 employees follow a similar trend, with a score of 36, an increase of 6 points quarter-over-quarter and 8 points compared to the same period last year. On a global scale, the Netherlands ranks third in employment expectations for small organizations, exceeding the global average NEO by 24 points.

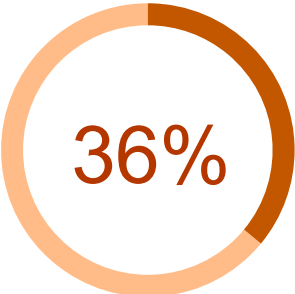
**Less than 10**  
Employees



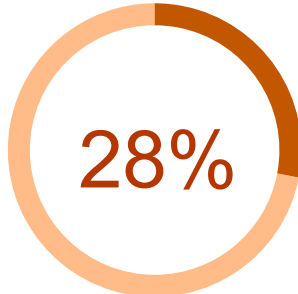
**10 - 49**  
Employees



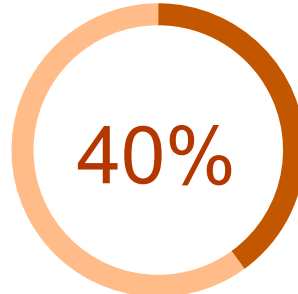
**50 - 249**  
Employees



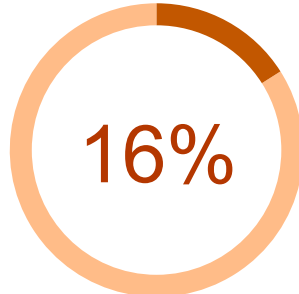
**250 - 999**  
Employees



**1,000 - 4,999**  
Employees

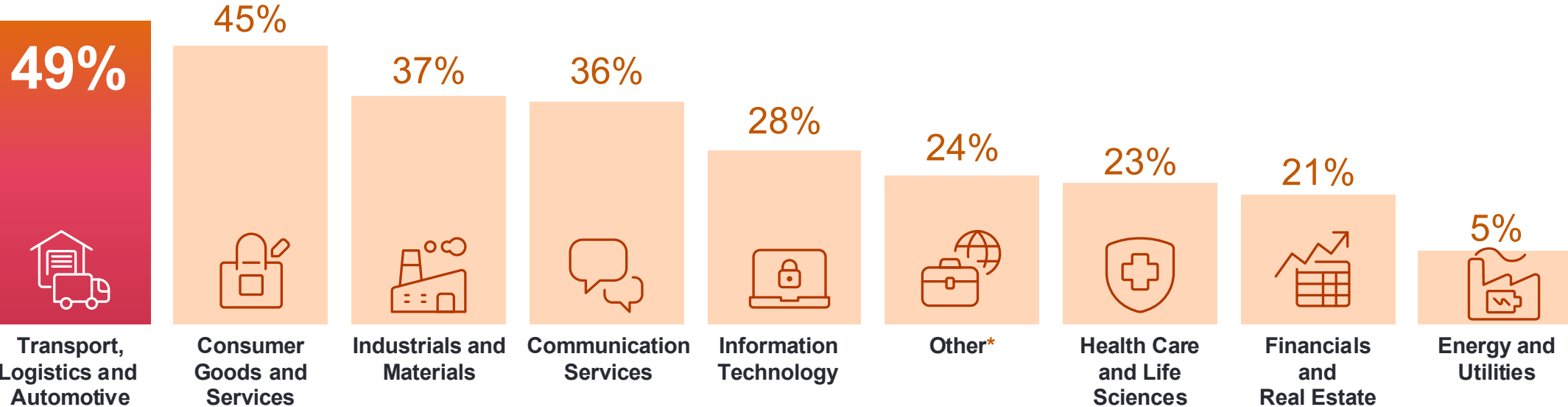


**5,000+**  
Employees



# Employment Outlooks Across Key Industry Sectors

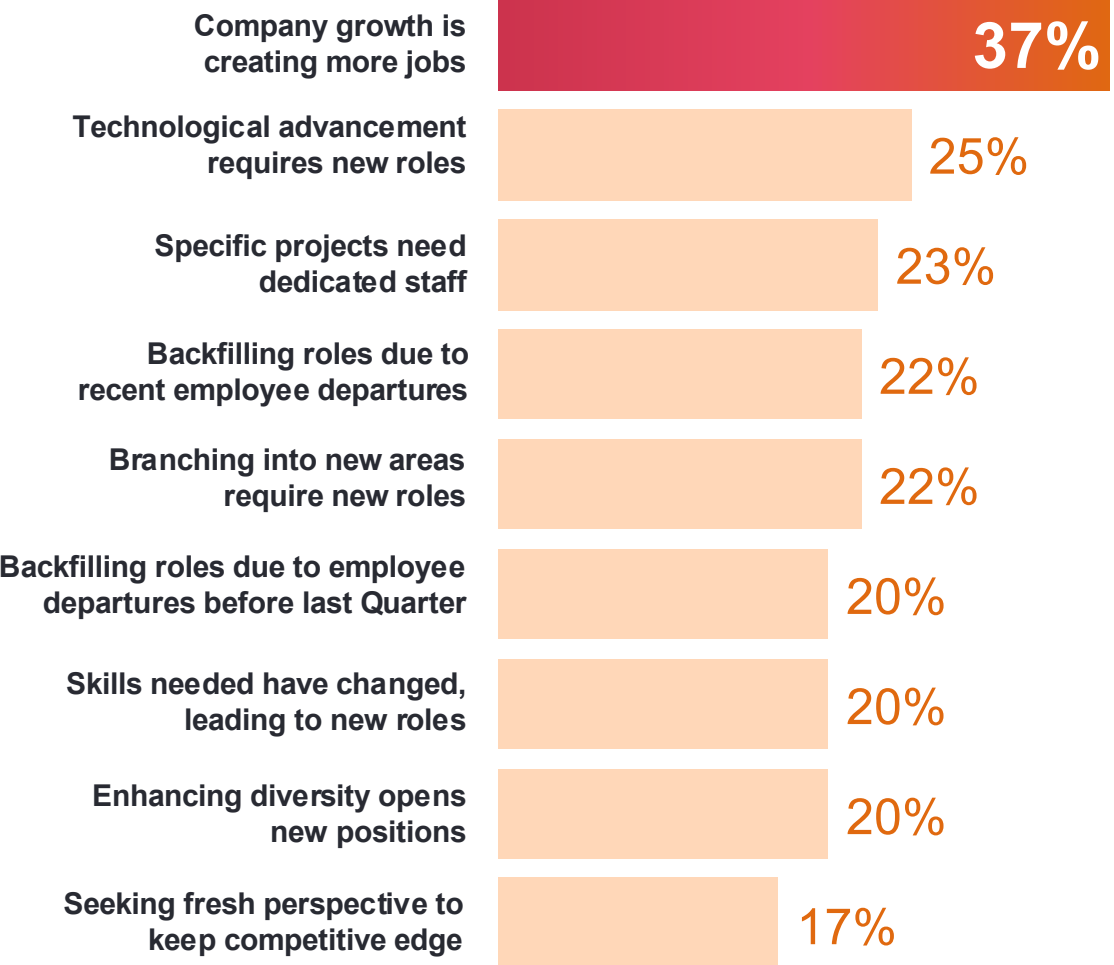
The Netherlands' most competitive sector is Transport, Logistics & Automotive with an employment outlook of 49. Although expectations in the sector decreased by 4 points from the previous quarter, they have increased by 9 points since this time last year. Additionally, the outlook in the Dutch Consumer Goods & Services sector is also notable, as for this sector the outlook stands at 45, reflecting an 8-point increase from last quarter and a 7-point growth year-over-year.



\*Government or Public Service; Not for Profit/NGO/Charity/Religious organization; Other Industry; Other Transport, Logistics & Automobiles Sub-Industry; Educational Institutions; Agriculture & Fishing

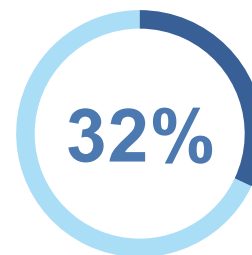
# Company Expansion Drives Q3 Staffing Increases

Dutch employers said **company expansion is the top reason for staffing increases.**

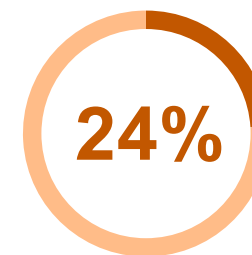


# Market shifts Influence Workforce Reductions

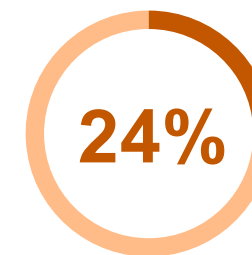
For Dutch employers anticipating a staffing decrease in the third quarter, **market changes is cited as the main challenge**, followed by economic challenges and automation.



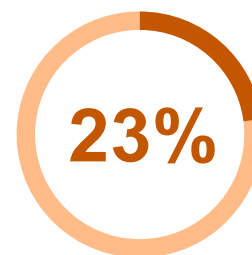
Market shifts lowering job demand



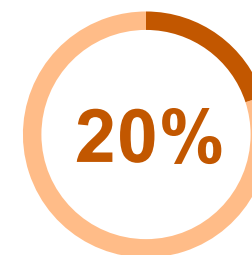
Economic challenges impacting staffing



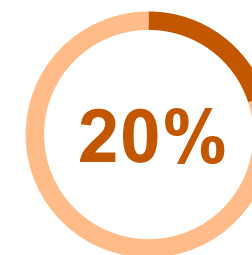
Automation has reduced some roles



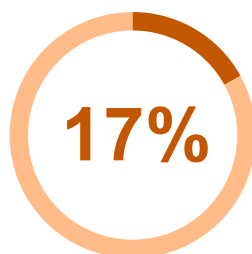
Restructuring or downsizing



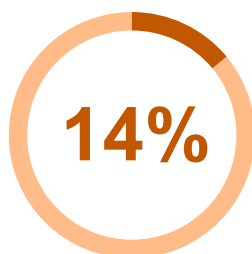
Project-based roles are ending



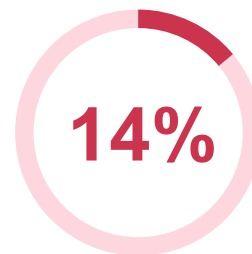
Adjusting to current demand



Process improvements are consolidating roles



Voluntary staff departures, not backfilling



Skill changes have reduced certain roles



# Q3 Netherlands relative to other countries



# Hiring Expectations by Country for Q3 2025

## Seasonally Adjusted, Net Employment Outlooks (NEO)

 **48%** U.A.E.  
Strongest NEO

 **30%** the Netherlands

 **24%** Global  
Average NEO

 **3%** Argentina  
Weakest NEO

<b>U.A.E.*</b>	<b>48%</b>	Singapore	24%	Israel	17%
India	42%	Sweden	24%	Italy	16%
Costa Rica	41%	Switzerland	24%	Portugal	16%
Brazil	33%	Australia	21%	Slovakia	16%
<b>The Netherlands</b>	<b>30%</b>	Belgium	20%	Austria	15%
U.S.	30%	Colombia	20%	Japan	15%
Guatemala	29%	Germany	20%	Czech Republic	13%
Ireland	29%	Taiwan	19%	Greece	11%
China	28%	U.K.	19%	Poland	11%
Mexico	28%	Chile	18%	Spain	11%
Canada	26%	Finland	18%	Hong Kong	8%
Norway	26%	Puerto Rico	18%	Romania	6%
Panama	25%	Türkiye	18%	Hungary	5%
Peru	24%	France	17%	<b>Argentina</b>	<b>3%</b>

\*The United Arab Emirates (U.A.E.) joined in Q3 2025. There is currently no historical data, and the data has not been seasonally adjusted.



# Year-Over-Year Changes by Country

Seasonally adjusted,  
NEO changes by  
percentage points (p)



**+12p** Israel

Most Strengthened Outlook



**+2p** Global

Average Outlook



**+2p** the Netherlands



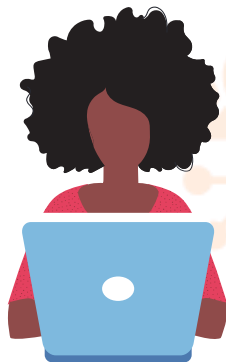
**-10p** Switzerland

Most Weakened Outlook

Israel	+13p	Romania	+3p	U.K.	-1p
India	+12p	<b>Global Average</b>	<b>+2p</b>	Italy	-2p
Sweden	+12p	<b>The Netherlands</b>	<b>+2p</b>	Portugal	-2p
Chile	+11p	Peru	+2p	Germany	-3p
Puerto Rico	+10p	Türkiye	+2p	Guatemala	-3p
Australia	+9p	Canada	+1p	Austria	-4p
Costa Rica	+7p	Taiwan	+1p	Mexico	-4p
Brazil	+6p	Argentina	0p	Poland	-4p
Panama	+6p	China	0p	Spain	-4p
Czech Republic	+5p	Colombia	0p	Belgium	-5p
Ireland	+4p	Greece	0p	Finland	-5p
Norway	+4p	U.S.	0p	France	-7p
Singapore	+4p	Hong Kong	0p	Hungary	-9p
Japan	+3p	Slovakia	-1p	<b>Switzerland</b>	<b>-10p</b>

# Tech Advancements Continue Powering APAC Job Creation

On average, **24% of employers report expanding their workforce** to meet the demands of technological advancements, with this trend being particularly pronounced among organizations in the Asia-Pacific region.



<b>U.K.</b>	<b>51%</b>	Italy	25%	Peru	21%
India	39%	Israel	25%	Mexico	21%
Brazil	34%	Norway	25%	Guatemala	20%
Taiwan	33%	<b>The Netherlands</b>	<b>25%</b>	Hungary	20%
U.A.E.	32%	Austria	25%	Colombia	19%
Hong Kong	31%	<b>Global Average</b>	<b>24%</b>	Costa Rica	18%
Spain	30%	Finland	24%	Argentina	17%
Slovakia	30%	Belgium	23%	Sweden	15%
Singapore	30%	U.S.	23%	Greece	15%
China	29%	Türkiye	23%	Portugal	15%
Poland	28%	Australia	22%	Chile	15%
France	26%	Germany	22%	Romania	13%
Canada	26%	Ireland	22%	Czech Republic	13%
Japan	26%	Switzerland	21%	<b>Panama</b>	<b>11%</b>
Puerto Rico	26%				



# Employment Outlooks Across Europe and the Middle East

Hiring expectations remain the lowest in Europe and the Middle East (19%), weakening by one point since Q2 2025 and unchanged year-over-year.

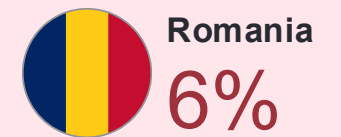
Outlooks vary across the region with employers most keen to hire in the U.A.E., The Netherlands, and Ireland.

The strongest Outlook globally for the Transport, Logistics, and Automotive (64%), Energy and Utilities (57%), Consumer Goods and Services industry verticals were reported by employers in the U.A.E. Highest hiring intentions in the IT industry are reported by employers in Norway, and Communication Services in the Czech Republic (57%).

## Strongest Hiring Intentions



## Weakest Hiring Intentions





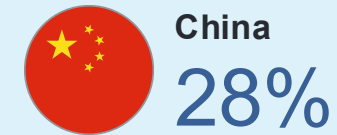
## Employment Outlooks Across the Asia Pacific

Hiring managers across the Asia-Pacific countries anticipate the second strongest regional Outlook (29%), decreasing when compared to the previous quarter and increasing since the same time last year by 1 and 6 points, respectively

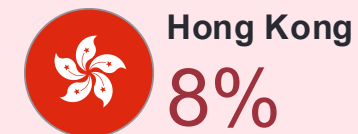
India, China, and Singapore, continue to report the strongest Outlooks in the region. The most cautious Outlooks were reported by employers in Hong Kong and Japan.

The strongest Outlook globally for the Financials and Real Estate industry vertical was reported by employers in India (43%).

### Strongest Hiring Intentions



### Weakest Hiring Intentions





## Employment Outlooks Across the Americas

Employers across North, Central, and South America reported the strongest regional Outlook for Q3 (34%), with hiring intentions improving 2 points both quarter-over-quarter and when compared to the same period last year.

Employers in the Costa Rica and Brazil reported the strongest hiring intentions across the Americas. Weakest Outlooks were reported in Argentina, Chile, and Puerto Rico.

The strongest Outlooks globally for both the Healthcare and Life Sciences and Industrials and Materials industry verticals were reported by employers in Costa Rica (62% and 47%, respectively).

### Strongest Hiring Intentions



### Weakest Hiring Intentions



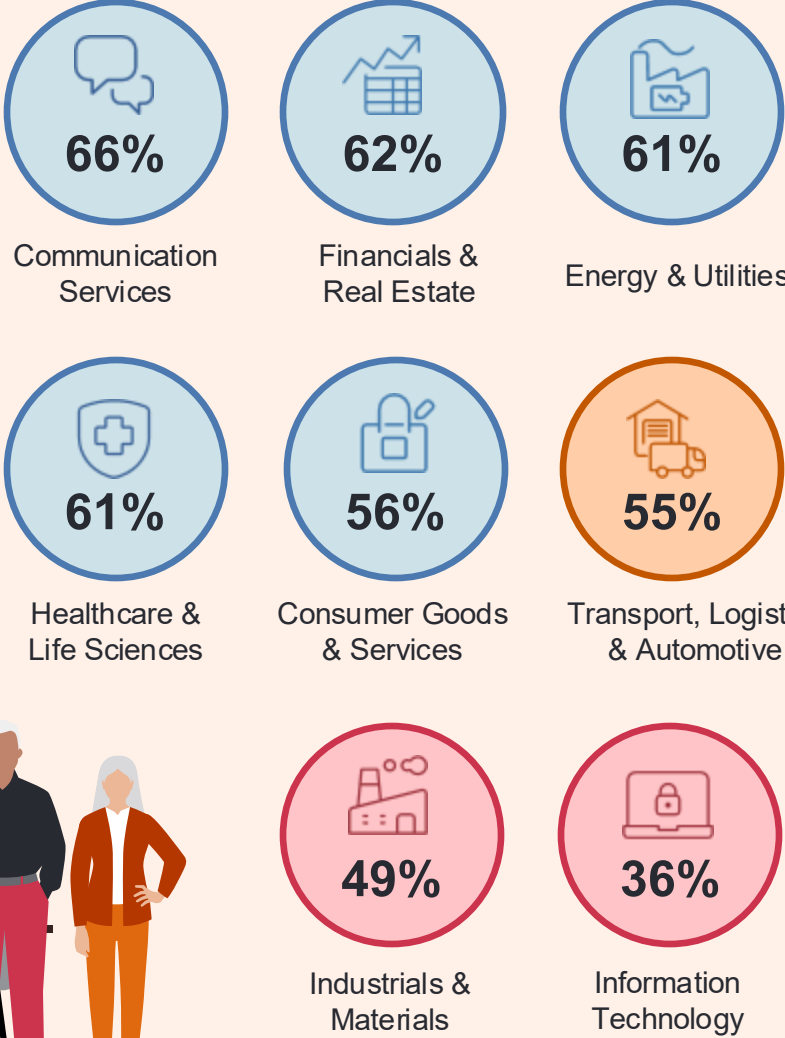
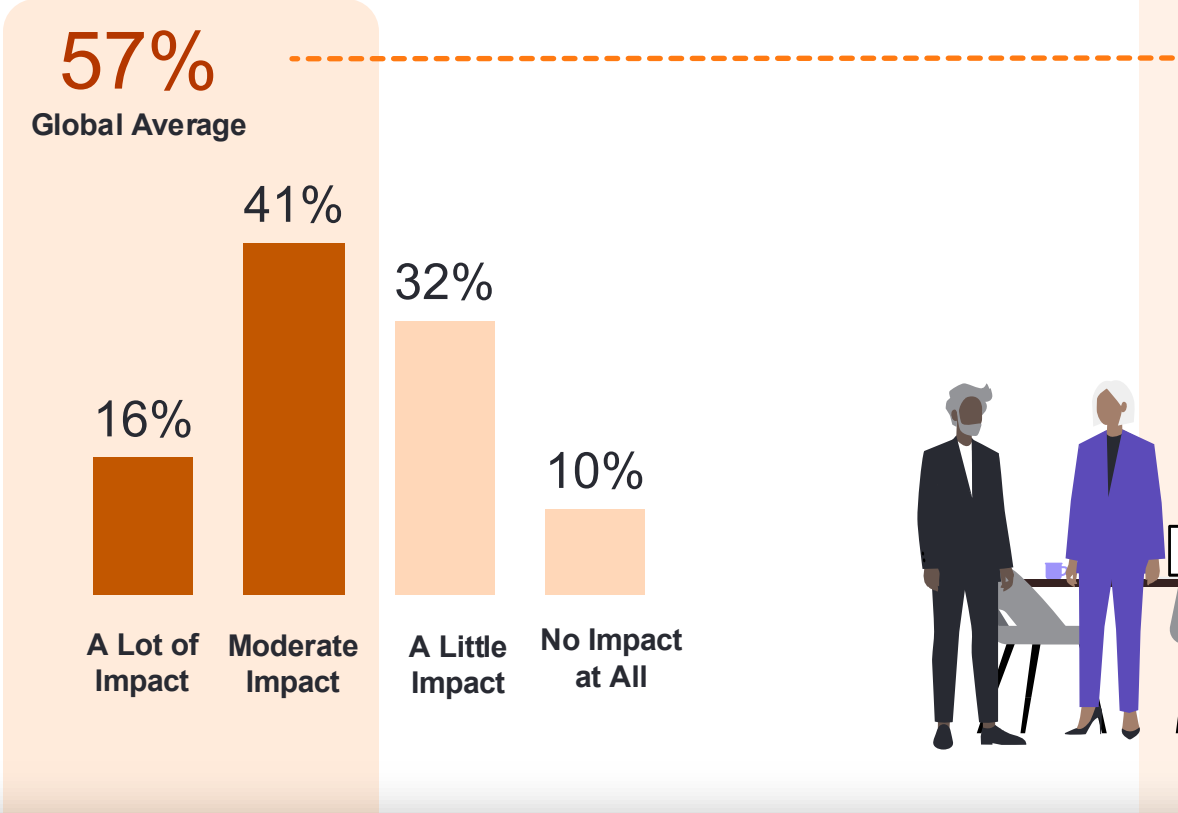


# Workforce Trends



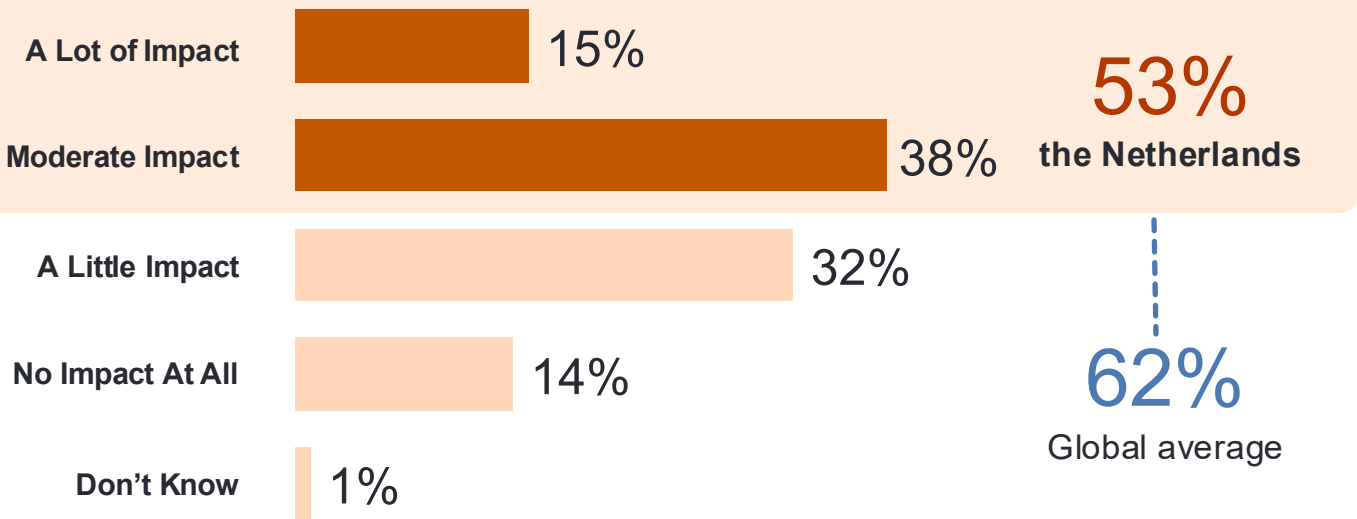
# Bracing for the Boomer Impact

Nearly 6 in 10 (57%) companies are future-proofing their HR strategy for an aging workforce. In the Netherlands, sectors like Communication Services, Financials, and Energy feel this most, underlining the need for targeted action.



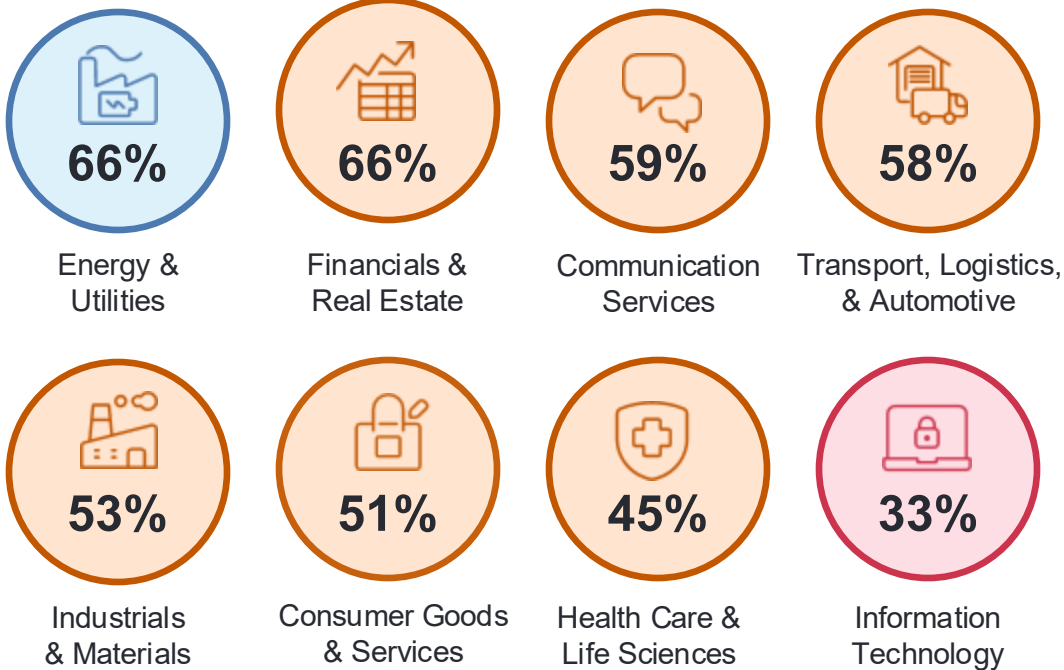
# Hiring in the Face of Trade Uncertainty


Global trade uncertainty is shaping hiring decisions for **over half of the Dutch companies (53%)**. Most Dutch employers report a moderate (38%) or significant (15%) impact, while only 14% experience no impact at all.

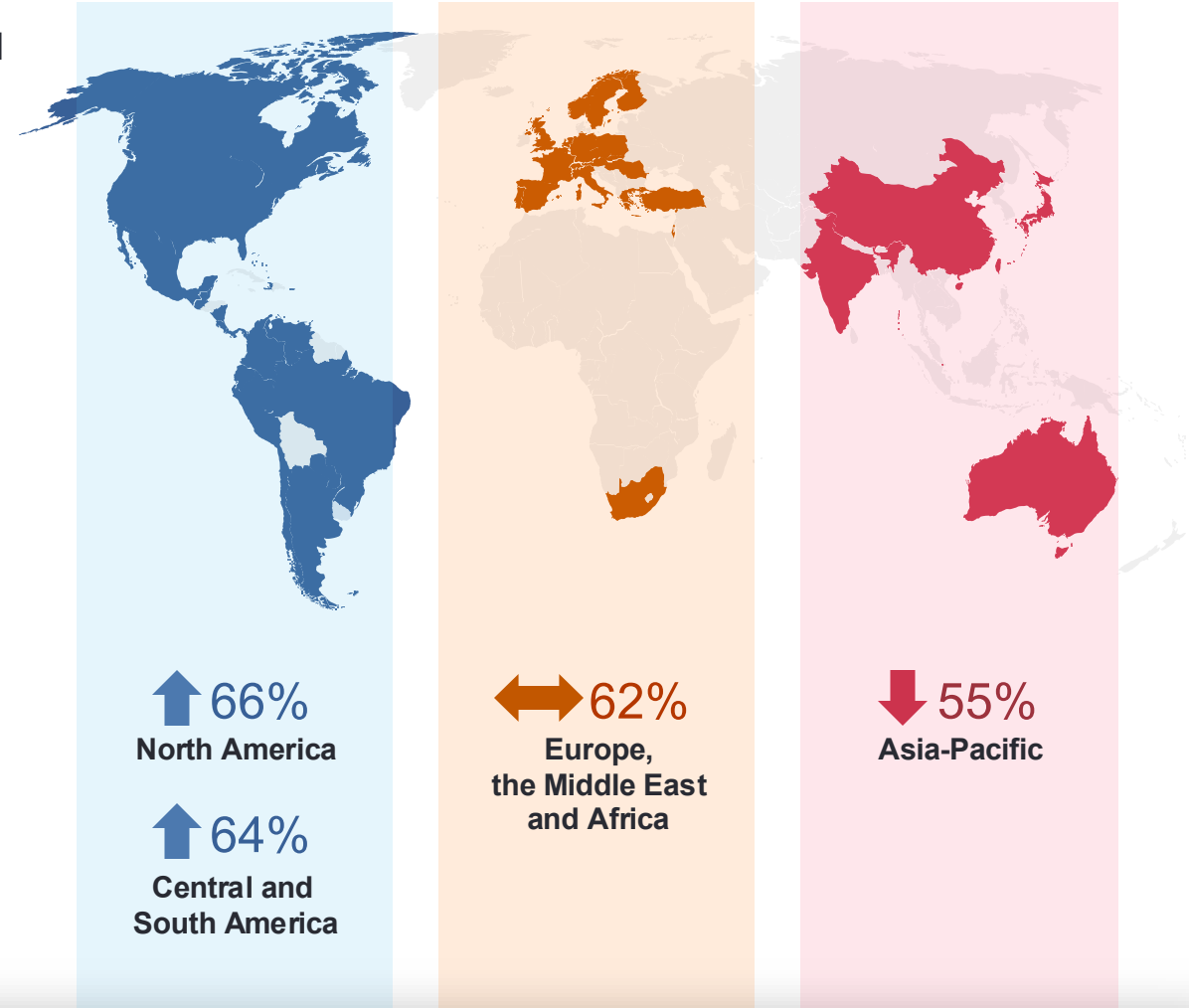


# Volatility Hotspots

The impact of global trade uncertainty is perceived as less of a concern by companies in the Netherlands compared to the global average. However, 53% still expect it to have a significant impact on hiring. This effect is visible across various sectors, with Information Technology being the exception.

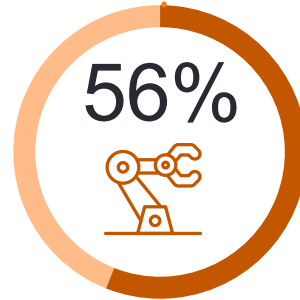


 **53%**  
the Netherlands

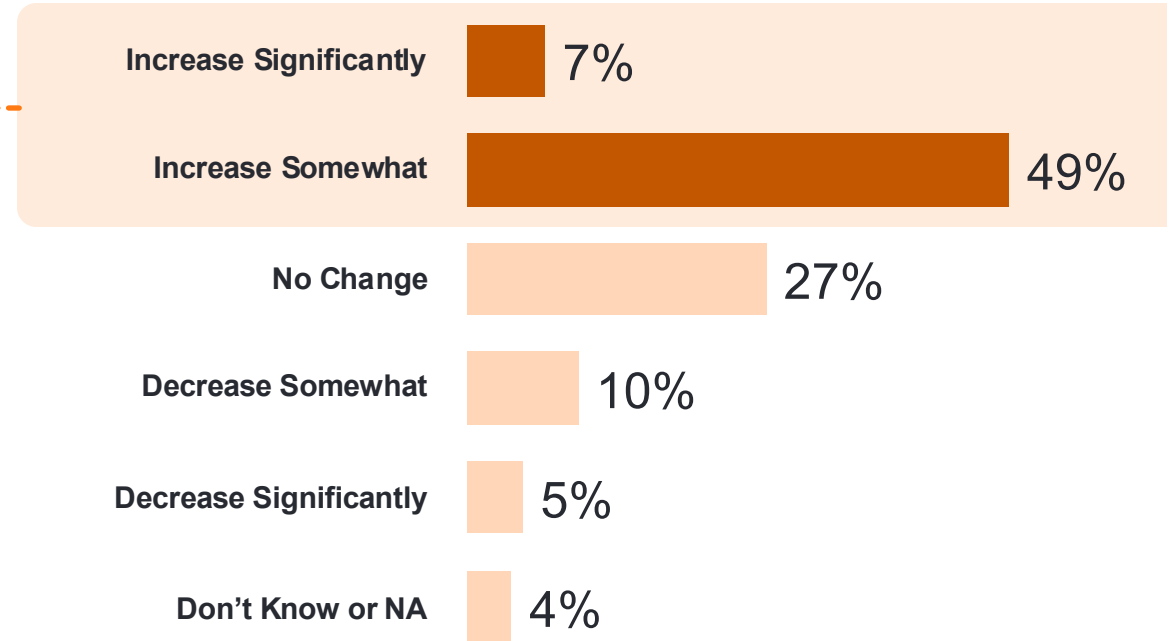


# Automation: Easing the Pain or Masking the Problem?

A growing number of Dutch companies have **focused on automation to handle repetitive tasks**, with 56% reporting increased investment.

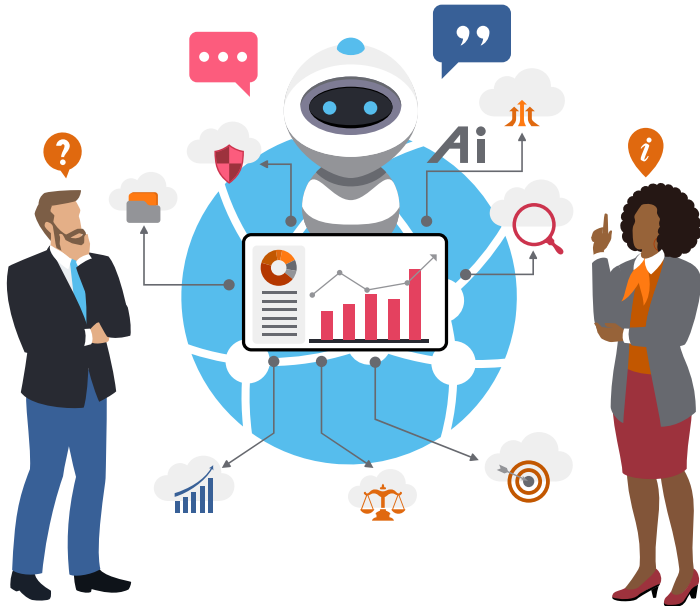


of Dutch companies are **increasing investment in task or process automation**



# Shifting Skills, Shifting Strategies

Most Dutch employers (72%) are **expecting automation to bring the biggest changes** to IT and data-focused roles over the next five years.





# About the Survey





# About the Survey

**The ManpowerGroup Employment Outlook Survey 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 40,671 public and private employers across 41 countries 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 (Q3 example): "How do you anticipate total employment at your location to change in the three months to the end of September 2025 as compared to the current quarter?"

**Survey Methodology** – Survey responses were collected from April 1-30, 2025. Size of organization and sector are standardized across all countries and territories to allow international comparisons.

## **Forward-Looking Statements –**

This report contains forward-looking statements, including statements regarding labor demand in certain regions, countries and industries, and economic uncertainty. Actual events or results may differ materially from those contained in the forward-looking statements, due to risks, uncertainties and assumptions. These factors include those found in the Company's reports filed with the U.S. Securities and Exchange Commission (SEC), including the information under the heading "Risk Factors" in its Annual Report on Form 10-K for the year ended December 31, 2024, whose information is incorporated herein by reference. ManpowerGroup disclaims any obligation to update any forward-looking or other statements in this release, except as required by law.



## Frequently Asked Questions

### **What is meant by Net Employment Outlook (NEO)?**

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 that expect to see a decrease in employment at their location in the next quarter. A positive Net Employment Outlook figure means that, on balance, there are more employers who expect to add to their headcount in the following three months than those who intend to reduce staff.

### **What is Seasonal Adjustment and why is it used in the ManpowerGroup Employment Outlook Survey?**

Seasonal adjustment is a statistical process that allows the Survey data to be presented without the impact of hiring fluctuations that normally occur through the course of the year, usually as a result of various external factors, such changes in weather, traditional production cycles, and public holidays. Seasonal adjustment has the effect of flattening peaks and smoothing troughs in the data to better illustrate underlying employment trends and provide a more accurate representation of the ManpowerGroup Employment Outlook Survey results.

### **How are companies selected for the survey?**

Employers are selected based on the types of companies and organizations they represent. We want to ensure that our panel is representative of each participating country's national labor market, so each country's panel is built in proportion to that country's overall distribution of industry sectors and organization sizes.

### **Who do you interview in each company?**

The person we select to interview will be someone with a good overview of staffing levels and hiring intentions within their organization. Normally this will be the head of HR or an HR manager. However, in smaller organizations, that person may be a general manager or even the CEO.

# ManpowerGroup Solutions Across the Entire HR Life Cycle



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