

**ManpowerGroup  
Employment  
Outlook Survey  
UK**

**Q1  
2021**



ManpowerGroup®

# United Kingdom Employment Outlook

The ManpowerGroup Employment Outlook Survey for the first quarter 2021 was conducted by interviewing a representative sample of 1,306 employers in the UK.

All survey participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of March 2021 as compared to the current quarter?”

Interviewing was carried out during the exceptional circumstances of the COVID-19 outbreak.

The survey findings for the first quarter of 2021 are likely to reflect the impact of the global health emergency, and may be notably different to previous quarters.

## Contents

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<b>UK Employment Outlook</b>	<b>1</b>
Organisation-Size Comparisons	
Regional Comparisons	
Sector Comparisons	
<b>Global Employment Outlook</b>	<b>15</b>
<b>About the Survey</b>	<b>17</b>
<b>About ManpowerGroup®</b>	<b>Back Cover</b>

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# UK Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Jan-Mar 2021</b>	<b>5</b>	<b>11</b>	<b>82</b>	<b>2</b>	<b>-6</b>	<b>-6</b>
Oct-Dec 2020	5	13	79	3	-8	-8
July-Sep 2020	5	17	72	6	-12	-12
Apr-June 2020	7	2	90	1	5	5
Jan-Mar 2020	5	4	90	1	1	1



Employers in the UK report downbeat hiring intentions for the first quarter of 2021. While 5% of employers expect to increase payrolls, 11% anticipate a decrease and 82% forecast no change, resulting in a Net Employment Outlook of -6%.

Once the data is adjusted to allow for seasonal variation, the Outlook also stands at -6%. Hiring sentiment improves by two percentage points when compared with the previous quarter, but declines by seven percentage points in comparison with last year at this time.

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.

# Organisation-Size Comparisons

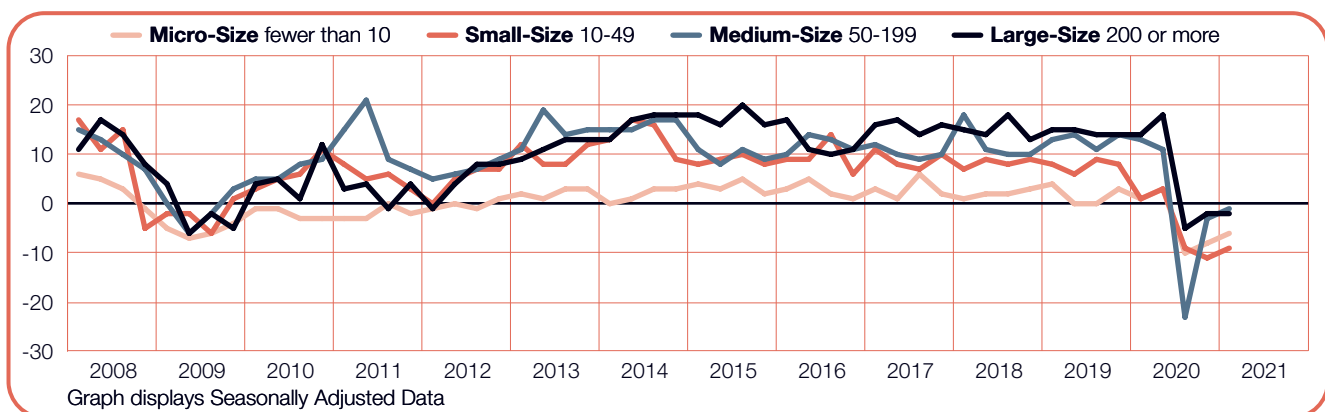
Participating employers are categorised into one of four organisation sizes: Micro businesses have fewer than 10 employees; Small businesses have 10-49 employees; Medium businesses have 50-199 employees; and Large businesses have 200 or more employees.

Employers expect to trim payrolls in all four organisation size categories during the next three months. The weakest labour market is forecast by Small employers with a Net Employment Outlook of -9%. Micro employers report muted hiring plans with an Outlook of -6%, while Outlooks stand at -2% and -1% for Large- and Medium-size employers, respectively.

Hiring intentions strengthen by two percentage points for Micro-, Small- and Medium-size employers when compared with the previous quarter. Meanwhile, Large employers report no change.

In a comparison with this time one year ago, hiring prospects weaken in all four organisation size categories, most notably by 16 and 14 percentage points for Large- and Medium-size firms, respectively. Elsewhere, Small employers report a decrease of 10 percentage points and the Outlook for Micro employers is seven percentage points weaker.

Organisation-Size	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Micro-Size</b> fewer than 10	3	9	86	2	-6	-6
<b>Small-Size</b> 10-49	6	14	74	6	-8	-9
<b>Medium-Size</b> 50-199	9	13	70	8	-4	-1
<b>Large-Size</b> 200 or more	12	15	65	8	-3	-2



# Regional Summary

Employers in 10 of the 12 regions expect a decline in payrolls during the first quarter of 2021. The weakest hiring pace is anticipated by employers in Northern Ireland, with a Net Employment Outlook of -18%. In London, employers report gloomy hiring prospects with an Outlook of -15%, while Outlooks of -10% and -9% are reported in the North East and Scotland, respectively. However, workforce gains are anticipated in two regions, including the East Midlands where the Outlook is +4%.

Hiring prospects strengthen in six of the 12 regions when compared with the previous quarter. Employers in the East Midlands report the most noteworthy increase of 14 percentage points, while Outlooks

are 12 and nine percentage points stronger in the South East and the East, respectively. Meanwhile, hiring sentiment weakens in six regions, including decreases of seven percentage points reported in both the North East and Northern Ireland.

In a comparison with the first quarter of 2020, hiring intentions weaken in 10 of the 12 regions, most notably by 18 percentage points in Northern Ireland. Outlooks decline by 14 percentage points in both London and Scotland, while the Outlook for the West Midlands decreases by 13 percentage points. Elsewhere, slight improvements of seven and two percentage points are reported in the East Midlands and Wales, respectively.

	Increase Q1 2021	Decrease Q1 2021	Q1 2021	Q4 2020	Q1 2020	Qtr on Qtr Change Q4 2020 to Q1 2021	Yr on Yr Change Q1 2020 to Q1 2021
	%	%	%	%	%	%	%
East	4	7	-3 (-3) <sup>1</sup>	-12 (-12) <sup>1</sup>	-1 (-1) <sup>1</sup>	9 (9) <sup>1</sup>	-2 (-2) <sup>1</sup>
East Midlands	9	3	6 (4) <sup>1</sup>	-8 (-10) <sup>1</sup>	-2 (-3) <sup>1</sup>	14 (14) <sup>1</sup>	8 (7) <sup>1</sup>
London	4	20	-16 (-15) <sup>1</sup>	-10 (-11) <sup>1</sup>	-2 (-1) <sup>1</sup>	-6 (-4) <sup>1</sup>	-14 (-14) <sup>1</sup>
North East	1	13	-12 (-10) <sup>1</sup>	-3 (-3) <sup>1</sup>	-4 (-2) <sup>1</sup>	-9 (-7) <sup>1</sup>	-8 (-8) <sup>1</sup>
North West	1	5	-4 (-3) <sup>1</sup>	-8 (-8) <sup>1</sup>	4 (6) <sup>1</sup>	4 (5) <sup>1</sup>	-8 (-9) <sup>1</sup>
Northern Ireland	2	22	-20 (-18) <sup>1</sup>	-12 (-11) <sup>1</sup>	-1 (0) <sup>1</sup>	-8 (-7) <sup>1</sup>	-19 (-18) <sup>1</sup>
Scotland	1	12	-11 (-9) <sup>1</sup>	-10 (-8) <sup>1</sup>	3 (5) <sup>1</sup>	-1 (-1) <sup>1</sup>	-14 (-14) <sup>1</sup>
South East	11	16	-5 (-3) <sup>1</sup>	-14 (-15) <sup>1</sup>	-1 (1) <sup>1</sup>	9 (12) <sup>1</sup>	-4 (-4) <sup>1</sup>
South West	3	4	-1 (-1) <sup>1</sup>	-3 (-3) <sup>1</sup>	4 (4) <sup>1</sup>	2 (2) <sup>1</sup>	-5 (-5) <sup>1</sup>
Wales	4	1	3 (1) <sup>1</sup>	2 (5) <sup>1</sup>	0 (-1) <sup>1</sup>	1 (-4) <sup>1</sup>	3 (2) <sup>1</sup>
West Midlands	8	6	2 (-2) <sup>1</sup>	-9 (-5) <sup>1</sup>	14 (11) <sup>1</sup>	11 (3) <sup>1</sup>	-12 (-13) <sup>1</sup>
Yorkshire & the Humber	8	15	-7 (-6) <sup>1</sup>	1 (-3) <sup>1</sup>	0 (1) <sup>1</sup>	-8 (-3) <sup>1</sup>	-7 (-7) <sup>1</sup>

1. Number in parentheses is the Net Employment Outlook when adjusted to remove seasonal variations.

# Sector Summary

In seven of the nine industry sectors, employers expect to trim payrolls during the January to March period. The weakest labour markets are anticipated in the Transport & Communications sector and the Hotels & Retail sector, where Net Employment Outlooks stand at -13%, while Community & Social sector employers report a sluggish Outlook of -8%. Meanwhile, limited job gains are forecast for two sectors with Outlooks of +2% – the Utilities sector and the Finance & Business Services sector.

In a quarter-over-quarter comparison, hiring prospects strengthen in five of the nine industry sectors. The most notable improvements of nine and six percentage points

are reported in the Finance & Business Services sector and the Construction sector, respectively. However, Outlooks weaken in four sectors, including a considerable decline of 14 percentage points for the Agriculture sector.

Hiring plans weaken in seven of the nine industry sectors when compared with this time one year ago. A considerable decline of 15 percentage points is reported in the Hotels & Retail sector, and Outlooks are 11 and 10 percentage points weaker in the Mining sector and the Manufacturing sector, respectively. Elsewhere, employers in the Utilities sector report a slight improvement of two percentage points.

	Increase Q1 2021	Decrease Q1 2021	Q1 2021	Q4 2020	Q1 2020	Qtr on Qtr Change Q4 2020 to Q1 2021	Yr on Yr Change Q1 2020 to Q1 2021
	%	%	%	%	%	%	%
Agriculture	1	12	-11 (-6) <sup>1</sup>	8 (8) <sup>1</sup>	-5 (0) <sup>1</sup>	-19 (-14) <sup>1</sup>	-6 (-6) <sup>1</sup>
Community & Social	4	11	-7 (-8) <sup>1</sup>	-6 (-5) <sup>1</sup>	3 (1) <sup>1</sup>	-1 (-3) <sup>1</sup>	-10 (-9) <sup>1</sup>
Construction	5	5	0 (-1) <sup>1</sup>	-7 (-7) <sup>1</sup>	1 (1) <sup>1</sup>	7 (6) <sup>1</sup>	-1 (-2) <sup>1</sup>
Finance & Business Services	5	3	2 (2) <sup>1</sup>	-6 (-7) <sup>1</sup>	2 (2) <sup>1</sup>	8 (9) <sup>1</sup>	0 (0) <sup>1</sup>
Hotels & Retail	4	20	-16 (-13) <sup>1</sup>	-11 (-11) <sup>1</sup>	-1 (2) <sup>1</sup>	-5 (-2) <sup>1</sup>	-15 (-15) <sup>1</sup>
Manufacturing	5	12	-7 (-6) <sup>1</sup>	-8 (-8) <sup>1</sup>	3 (4) <sup>1</sup>	1 (2) <sup>1</sup>	-10 (-10) <sup>1</sup>
Mining	2	9	-7 (-7) <sup>1</sup>	-12 (-8) <sup>1</sup>	4 (4) <sup>1</sup>	5 (1) <sup>1</sup>	-11 (-11) <sup>1</sup>
Transport & Communications	6	19	-13 (-13) <sup>1</sup>	-18 (-17) <sup>1</sup>	-4 (-4) <sup>1</sup>	5 (4) <sup>1</sup>	-9 (-9) <sup>1</sup>
Utilities	7	5	2 (2) <sup>1</sup>	4 (4) <sup>1</sup>	0 (0) <sup>1</sup>	-2 (-2) <sup>1</sup>	2 (2) <sup>1</sup>

1. Number in parentheses is the Net Employment Outlook when adjusted to remove seasonal variations.

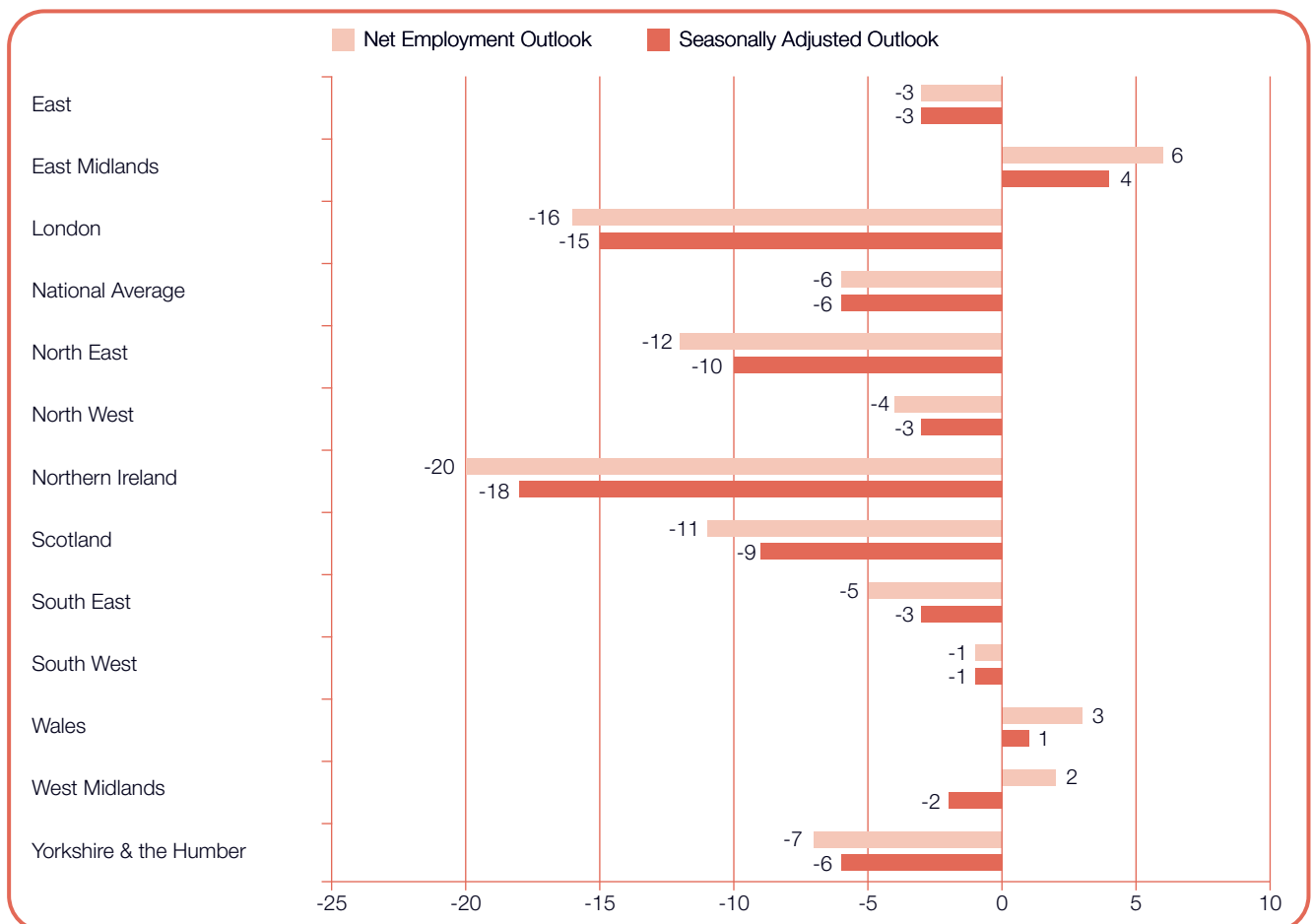
# Regional Comparisons

In 10 of the 12 regions, employers expect to trim payrolls during the next three months. Reporting a gloomy Net Employment Outlook of -18%, Northern Ireland employers forecast the weakest labour market, and dim hiring prospects are also reflected in an Outlook of -15% for London. Employers in the North East expect a sluggish hiring pace, reporting an Outlook of -10%, while Outlooks of -9% and -6% are reported in Scotland and Yorkshire & the Humber, respectively. Downbeat hiring activity is anticipated in three regions with Outlooks of -3% – the East, the North West and the South East – while Outlooks stand at -2% and -1% in the West Midlands and the South West, respectively. Meanwhile, employers in the East Midlands forecast limited job gains with an Outlook of +4%, while the Outlook for Wales stands at +1%.

In a comparison with the previous quarter, Outlooks improve in six of the 12 regions, most notably by 14 percentage points in the East Midlands and by 12 percentage points in the South East. Employers in the

East report an increase of nine percentage points and Outlooks increase by five and three percentage points in the North West and the West Midlands, respectively. However, hiring intentions also weaken in six regions. Declines of seven percentage points are reported in two regions – the North East and Northern Ireland – while Outlooks are four percentage points weaker in both London and Wales.

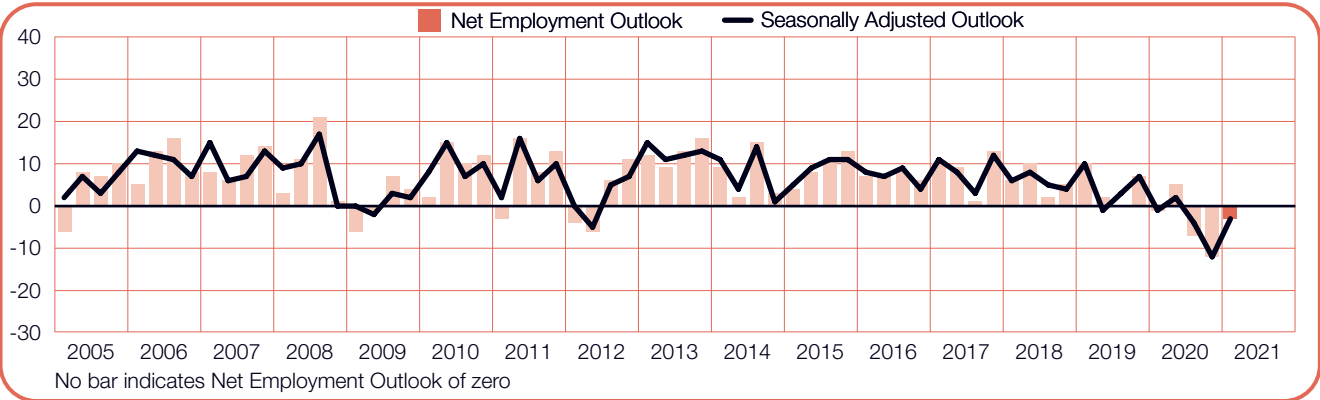
Employers in 10 of the 12 regions report a decline in hiring sentiment when compared with this time one year ago. Considerably weaker Outlooks are reported in Northern Ireland, declining by 18 percentage points, and in London and Scotland, where employers report decreases of 14 percentage points. In the West Midlands, employers report a decline of 13 percentage points, and Outlooks are nine and eight percentage points weaker for the North West and the North East, respectively. However, hiring plans strengthen by seven percentage points in the East Midlands and by two percentage points in Wales.



**-3 (-3)%**

## East

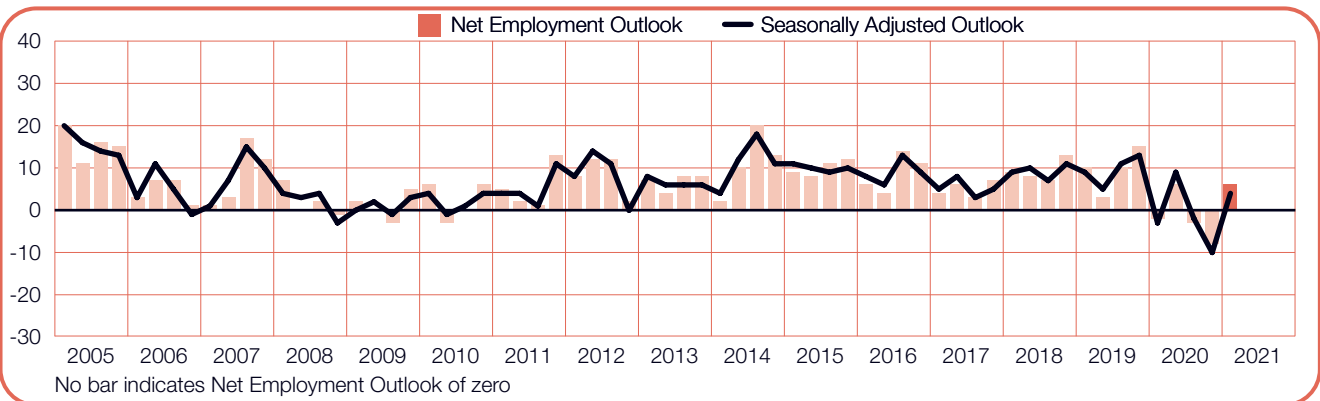
The slump in hiring activity is forecast to continue in the coming quarter, with employers reporting a third consecutive negative Net Employment Outlook, standing at -3%. Hiring plans improve by nine percentage points when compared with the previous quarter, but decline by two percentage points year-over-year.



**+6 (+4)%**

## East Midlands

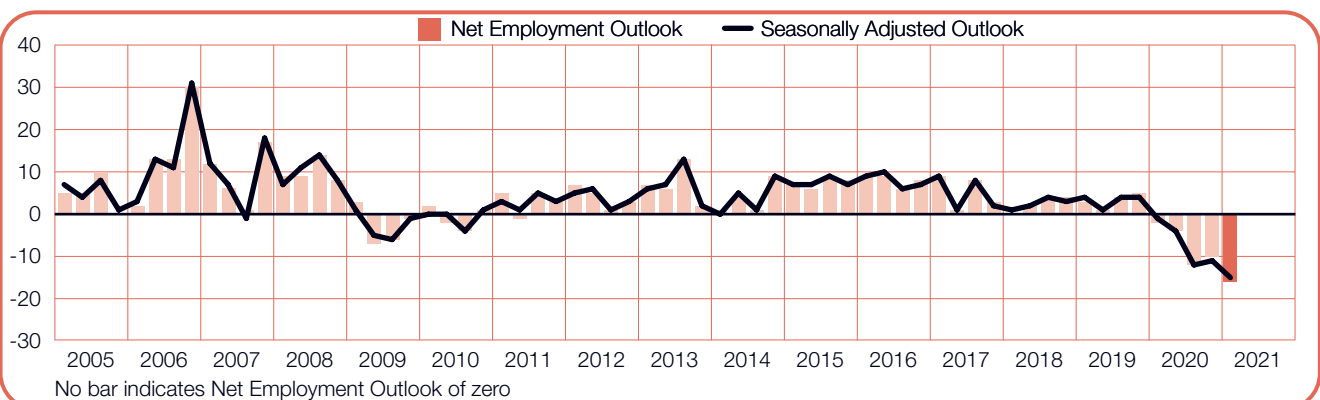
Job seekers can expect limited hiring opportunities in the first quarter of 2021, according to employers who report a Net Employment Outlook of +4%. Hiring prospects are 14 percentage points stronger quarter-over-quarter and increase by seven percentage points when compared with this time one year ago.



**-16 (-15)%**

## London

Employers anticipate the weakest labour market since the survey began in 1992 during the January to March period, reporting a Net Employment Outlook of -15%, the fifth consecutive negative forecast. Hiring intentions decline by four percentage points in comparison with the prior quarter and are 14 percentage points weaker when compared with last year at this time.

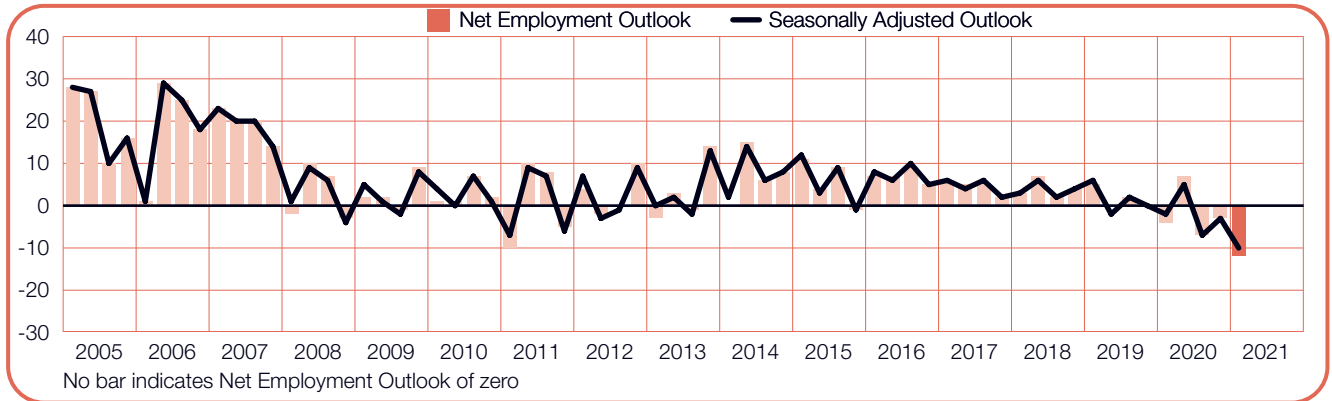




**-12 (-10)%**

## North East

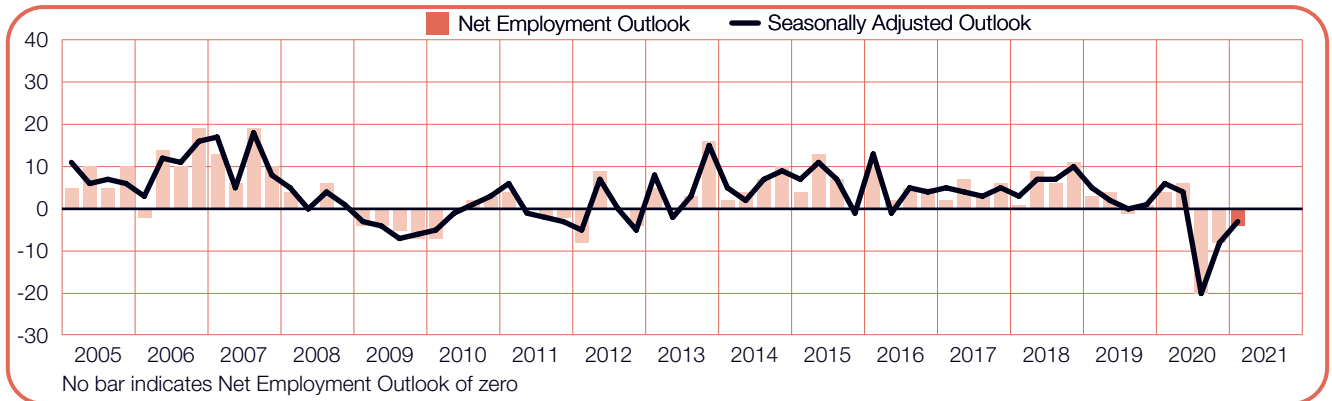
The weakest hiring pace since 2002 is expected in the next three months, with employers reporting a Net Employment Outlook of -10%. Hiring plans decline by seven and eight percentage points quarter-over-quarter and year-over-year, respectively.



**-4 (-3)%**

## North West

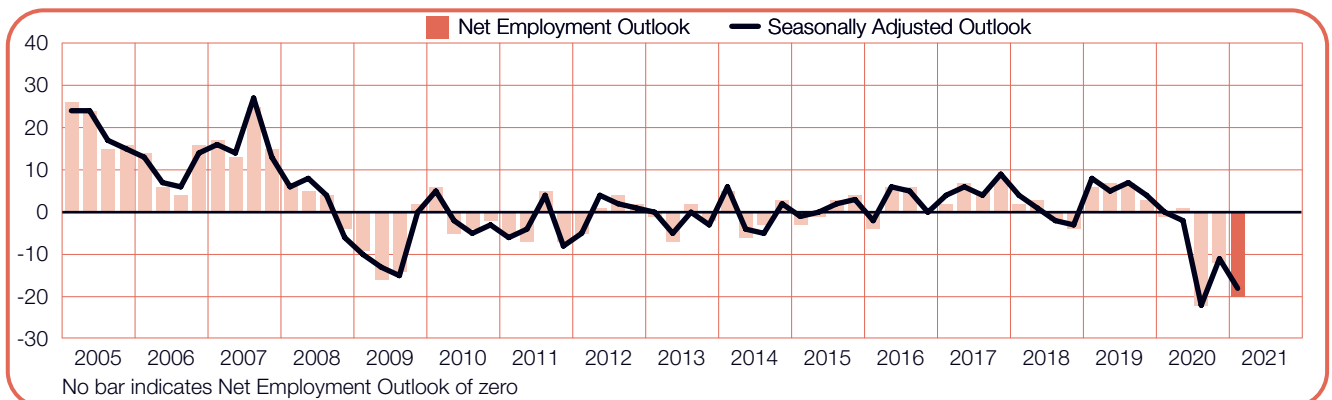
With a Net Employment Outlook of -3%, employers forecast a dull hiring climate during the January to March period. While the Outlook is five percentage points stronger in comparison with the prior quarter, employers report a decline of nine percentage points when compared with this time one year ago.



**-20 (-18)%**

## Northern Ireland

Job seekers can expect the gloomy hiring climate to continue in the forthcoming quarter, according to employers who report a Net Employment Outlook of -18%, the fourth consecutive negative forecast. The Outlook is seven percentage points weaker when compared with the previous quarter and decreases by 18 percentage points in comparison with the same period last year.



**-11 (-9)%**

## Scotland

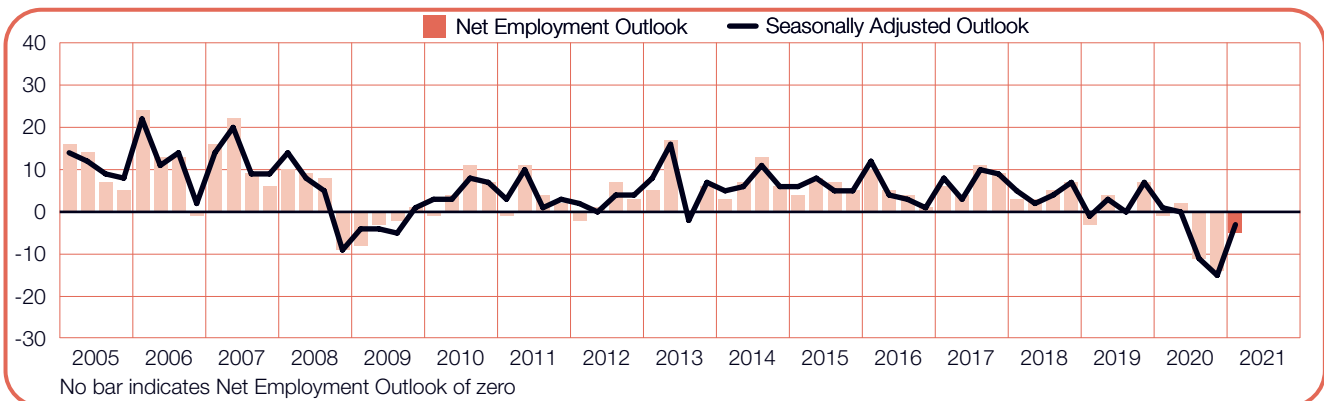
With the Net Employment Outlook declining for five consecutive quarters, employers report the weakest hiring plans in more than nine years for the first quarter of 2021. The Outlook stands at -9%, remaining relatively stable in comparison with the prior quarter, but declining by 14 percentage points when compared with this time one year ago.



**-5 (-3)%**

## South East

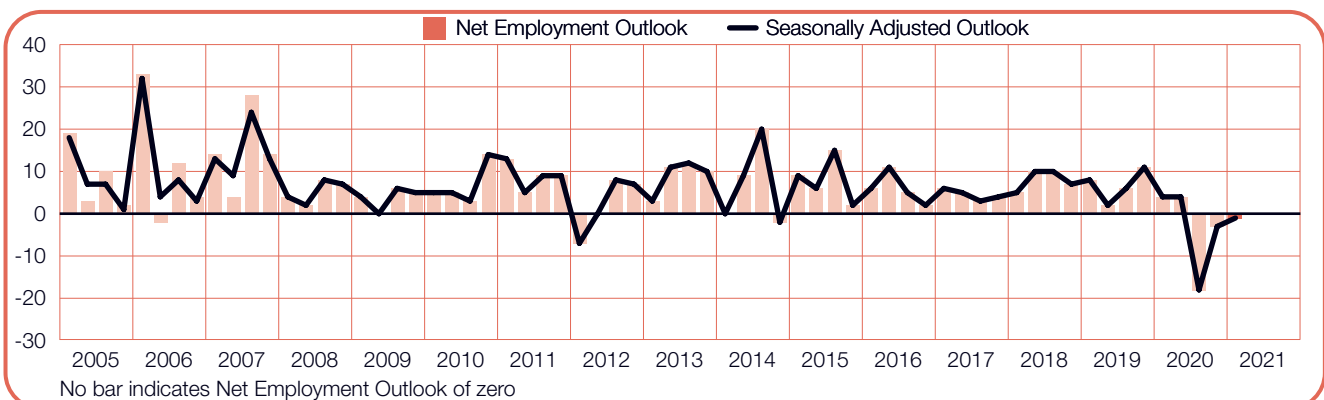
Job seekers can expect a muted hiring pace in the upcoming quarter, according to employers who report a Net Employment Outlook of -3%. Hiring prospects improve by a considerable margin of 12 percentage points when compared with the previous quarter, but are four percentage points weaker year-over-year.



**-1 (-1)%**

## South West

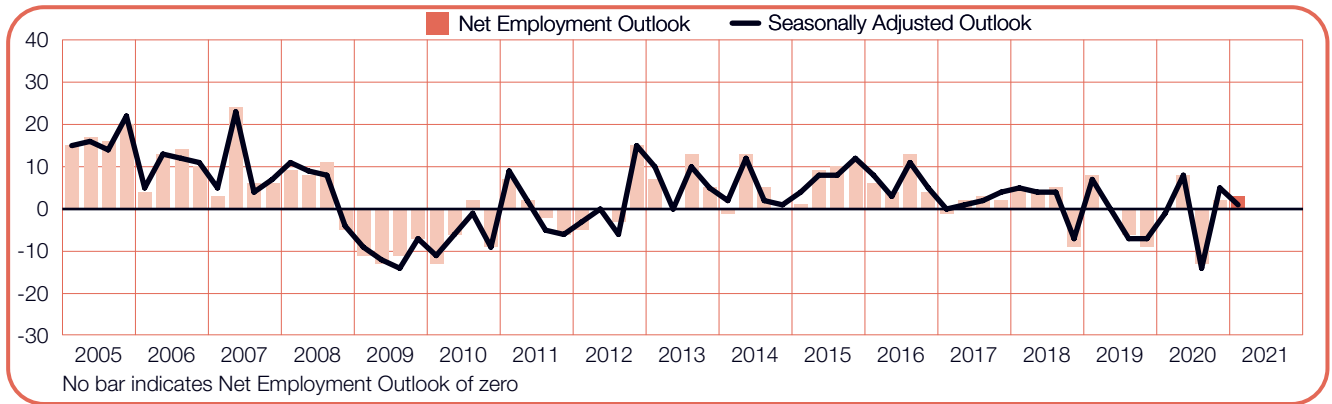
A subdued labour market is anticipated in Quarter 1 2021, with employers reporting a Net Employment Outlook of -1%. The Outlook is two percentage points stronger quarter-over-quarter, but declines by five percentage points in comparison with the same period last year.



**+3 (+1)%**

## Wales

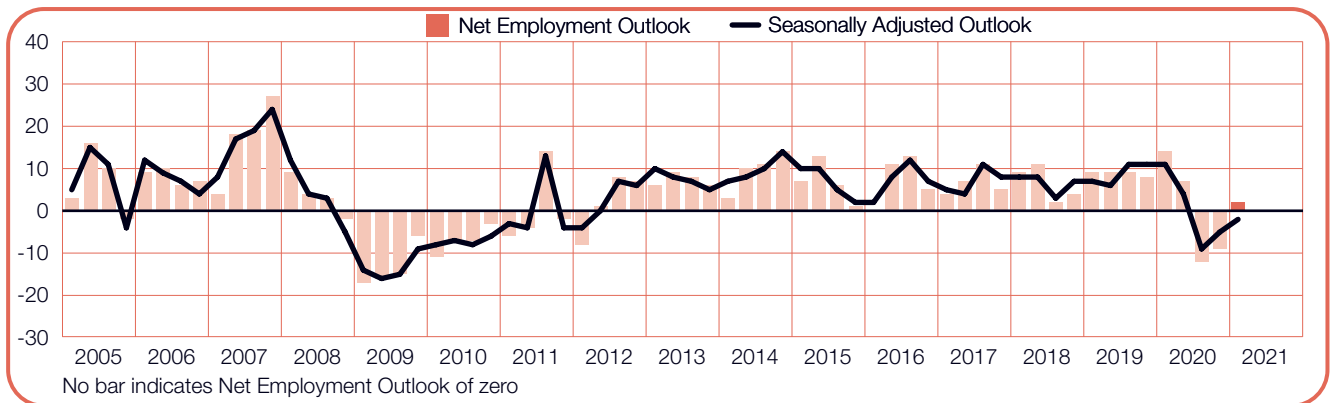
A soft labour market is anticipated in the January to March period, with employers reporting a Net Employment Outlook of +1%. Hiring plans decline by four percentage points quarter-over-quarter, but improve by two percentage points in comparison with the first quarter of 2020.



**+2 (-2)%**

## West Midlands

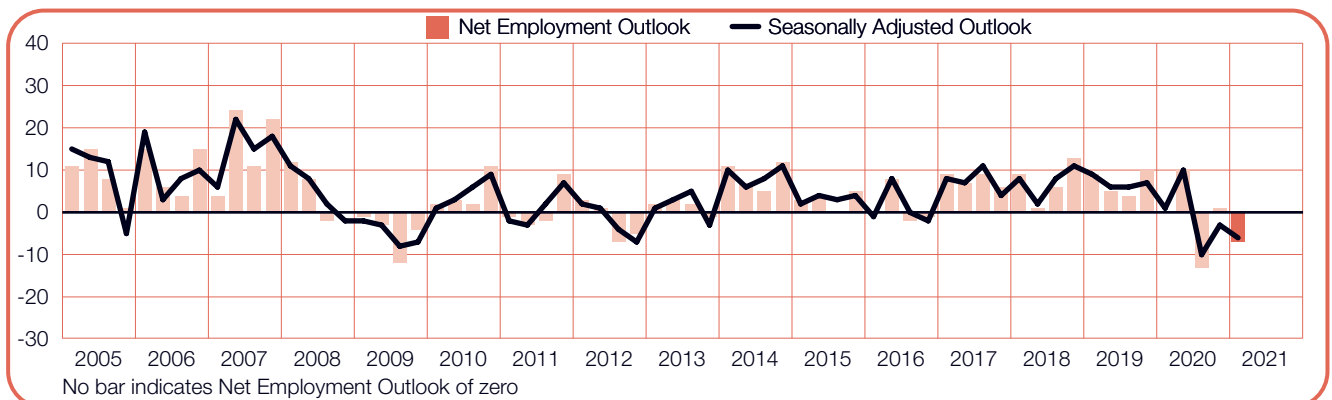
Reporting a Net Employment Outlook of -2%, employers forecast a downbeat hiring pace in the coming quarter. Hiring intentions improve by three percentage points when compared with the previous quarter, but are 13 percentage points weaker in comparison with Quarter 1 2020.



**-7 (-6)%**

## Yorkshire & the Humber

The labour market slump is expected to continue in the next three months with employers reporting a third consecutive negative Net Employment Outlook, standing at -6%. Hiring plans decline by three percentage points quarter-over-quarter and by seven percentage points year-over-year.



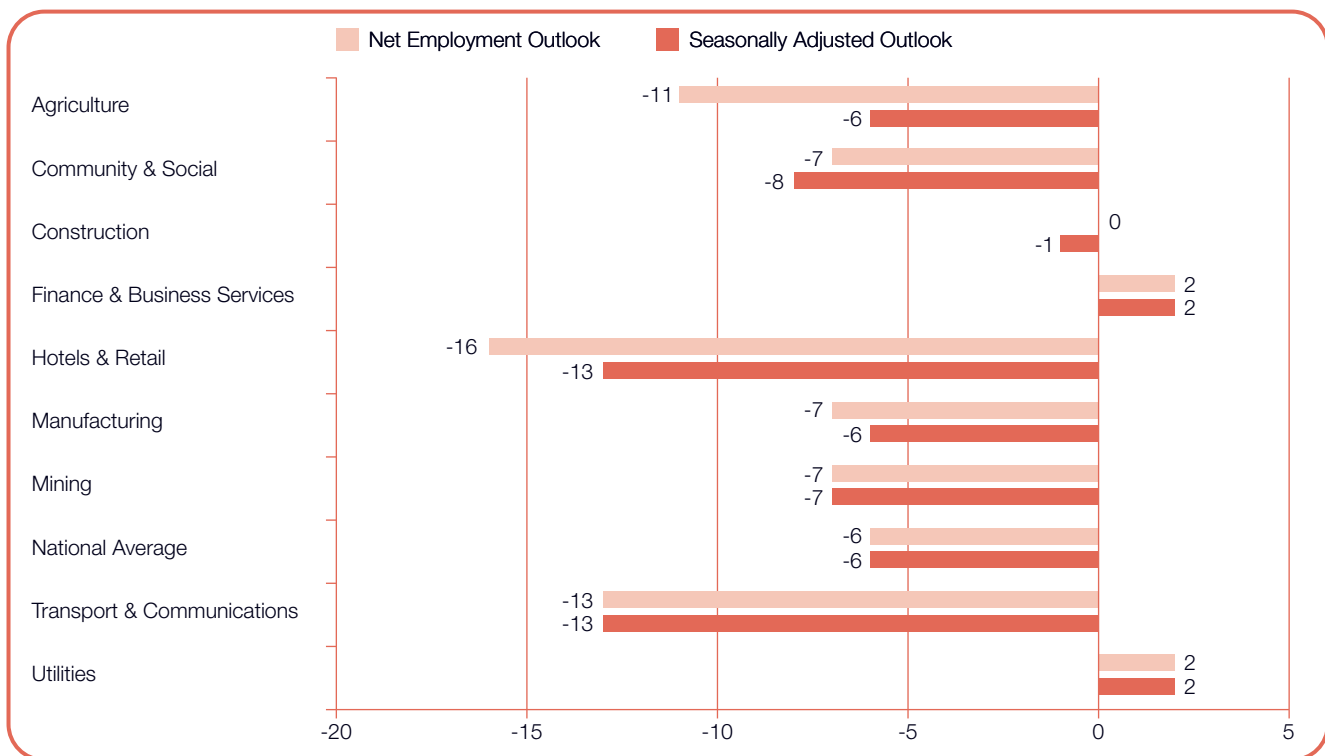
# Sector Comparisons

Employers expect a decrease in payrolls for seven of the nine industry sectors during the forthcoming quarter. Hiring sentiment is weakest in two sectors with Net Employment Outlooks of -13% – the Transport & Communications sector and the Hotels & Retail sector. In the Community & Social sector, employers report pessimistic hiring plans with an Outlook of -8%, while the Outlook for the Mining sector stands at -7%. Sluggish hiring activity is forecast for the Agriculture sector and the Manufacturing sector, with Outlooks of -6%, while the Outlook of -1% for the Construction sector reflects uncertain hiring prospects. However, employers in both the Utilities sector and the Finance & Business Services sector expect limited payroll growth, reporting Outlooks of +2%.

Hiring plans strengthen in five of the nine industry sectors when compared with the previous quarter. Employers in the Finance & Business Services sector report the most noteworthy increase of nine percentage points, while Outlooks increase by six and four percentage points in the Construction sector and the Transport & Communications sector, respectively. Elsewhere, hiring intentions weaken in four sectors. A considerable decrease of 14 percentage points is reported in the Agriculture sector, while the Community & Social sector Outlook declines by three percentage points.

When compared with the first quarter of 2020, hiring sentiment weakens in seven of the nine industry sectors, including a considerable decrease of 15 percentage points for the Hotels & Retail sector. Hiring prospects decline by 11 percentage points in the Mining sector and are 10 percentage points weaker in the Manufacturing sector, while employers in both the Community & Social sector and the Transport & Communications sector report decreases of nine percentage points. Meanwhile, an increase of two percentage points is reported for the Utilities sector and employers in the Finance & Business Services sector report no change.

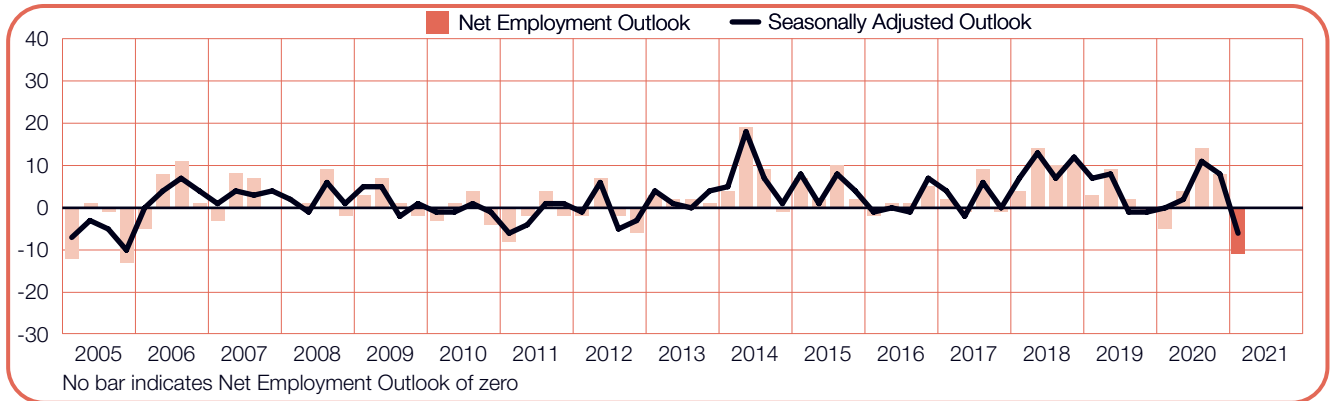
When compared with the first quarter of 2020, hiring sentiment weakens in seven of the nine industry sectors, including a considerable decrease of 15 percentage points for the Hotels & Retail sector. Hiring prospects decline by 11 percentage points in the Mining sector and are 10 percentage points weaker in the Manufacturing sector, while employers in both the Community & Social sector and the Transport & Communications sector report decreases of nine percentage points. Meanwhile, an increase of two percentage points is reported for the Utilities sector and employers in the Finance & Business Services sector report no change.



**-11 (-6)%**

## Agriculture

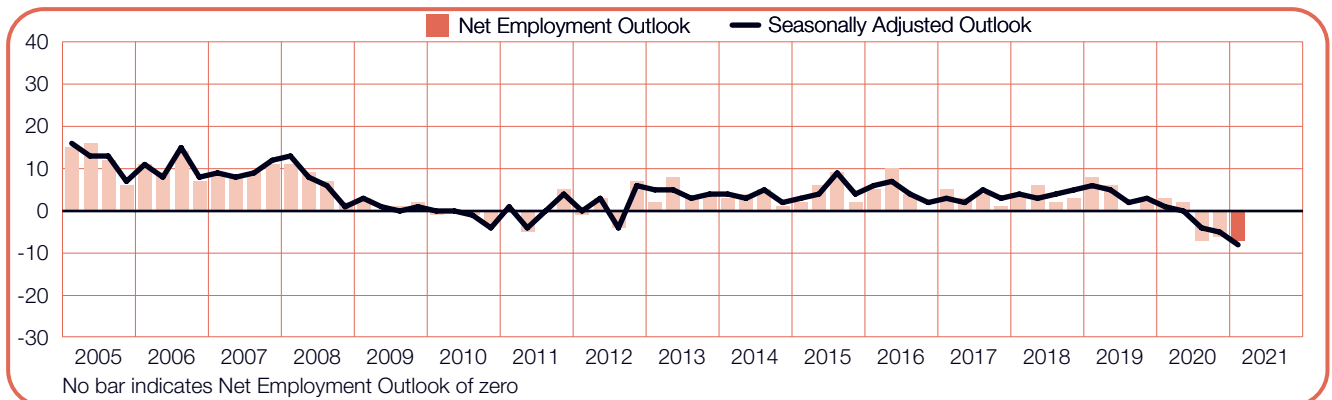
The weakest hiring pace in 10 years is anticipated during the January to March period. Employers report a Net Employment Outlook of -6%, declining by 14 percentage points when compared with the previous quarter and by six percentage points in comparison with last year at this time.



**-7 (-8)%**

## Community & Social

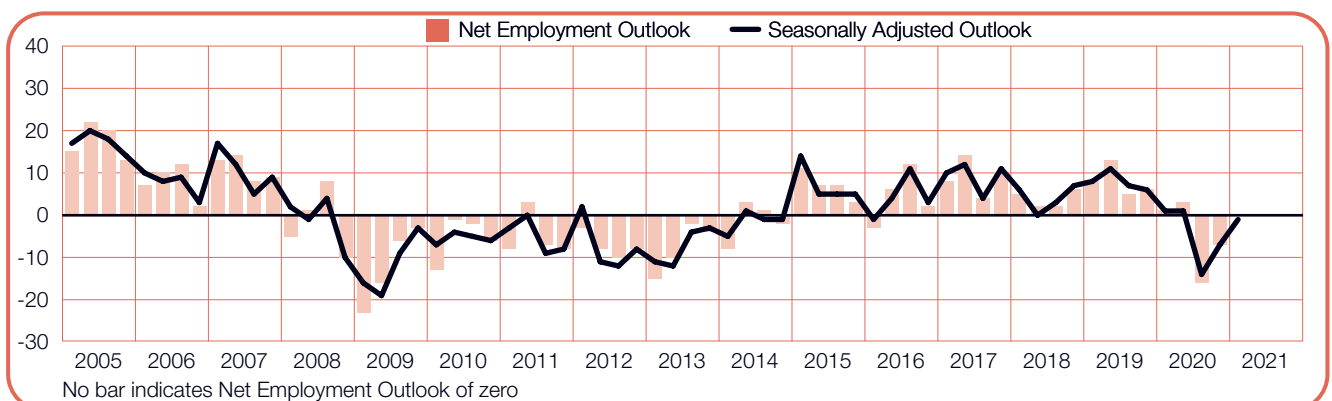
The labour market slump is expected to continue in the next three months, with employers reporting a declining Net Employment Outlook for five consecutive quarters, standing at -8% for the quarter ahead. Hiring prospects decline by three and nine percentage points in comparison with Quarter 4 2020 and last year at this time, respectively.



**0 (-1)%**

## Construction

Job seekers can expect a subdued labour market in the upcoming quarter, according to employers who report a Net Employment Outlook of -1%. Hiring sentiment is six percentage points stronger quarter-over-quarter, but declines by two percentage points when compared with this time one year ago.



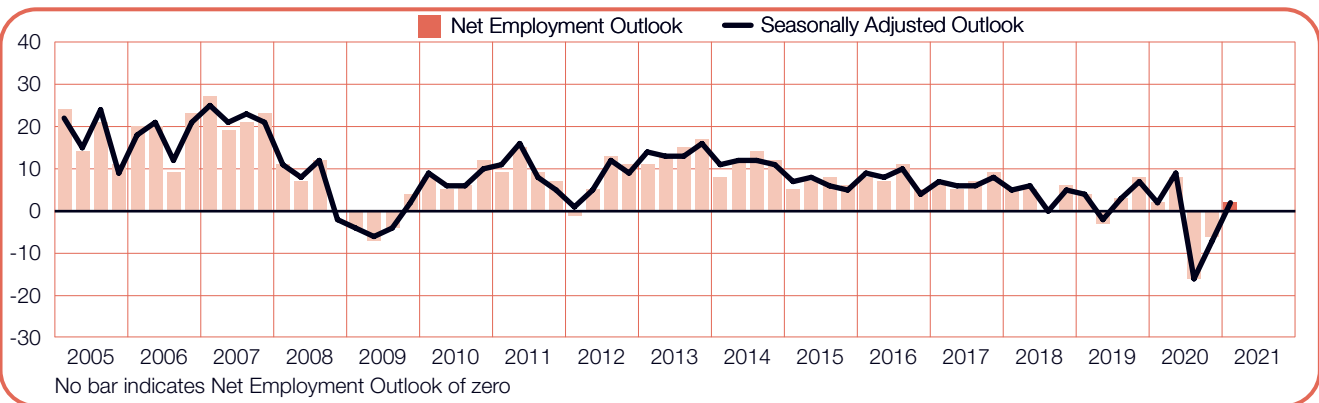
**+2 (+2)%**

## Finance & Business Services

Reporting a Net Employment Outlook of +2%, employers forecast slow-paced hiring activity for the next three months. Hiring prospects improve by nine percentage points when compared with the previous quarter and are unchanged in comparison with the same period in 2020.

Finance sub-sector employers report muted hiring plans for the upcoming quarter with a Net Employment Outlook of -2%. Hiring sentiment improves by three percentage points quarter-over-quarter, but declines by six percentage points when compared with this time one year ago.

In the Business Services sub-sector, employers anticipate slow-paced job gains with a Net Employment Outlook of +2%. The Outlook is 10 percentage points stronger when compared with the previous quarter, while remaining unchanged year-over-year.



**-16 (-13)%**

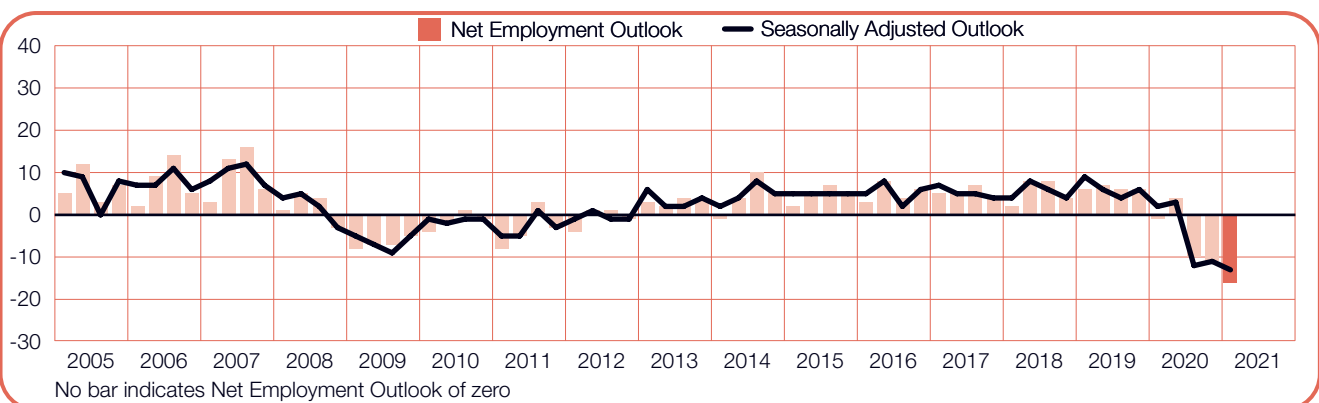
## Hotels & Retail

The weakest labour market since the survey began in 1992 is anticipated during the forthcoming quarter. The Net Employment Outlook stands at -13%, the third straight gloomy forecast, declining by two percentage points in comparison with the prior quarter and by 15 percentage points when compared with this time one year ago.

Employers in the B2B sub-sector forecast a dull hiring climate for the coming quarter with a Net Employment Outlook of -3%. Hiring sentiment is 11 percentage points stronger when compared with the previous quarter, but declines by three percentage points year-over-year.

The labour market slump in the B2C sub-sector is expected to continue in Quarter 1 2021. Employers report a fourth consecutive negative Net Employment Outlook, standing at -10%, and declining by four and 13 percentage points when compared with the prior quarter and this time one year ago, respectively.

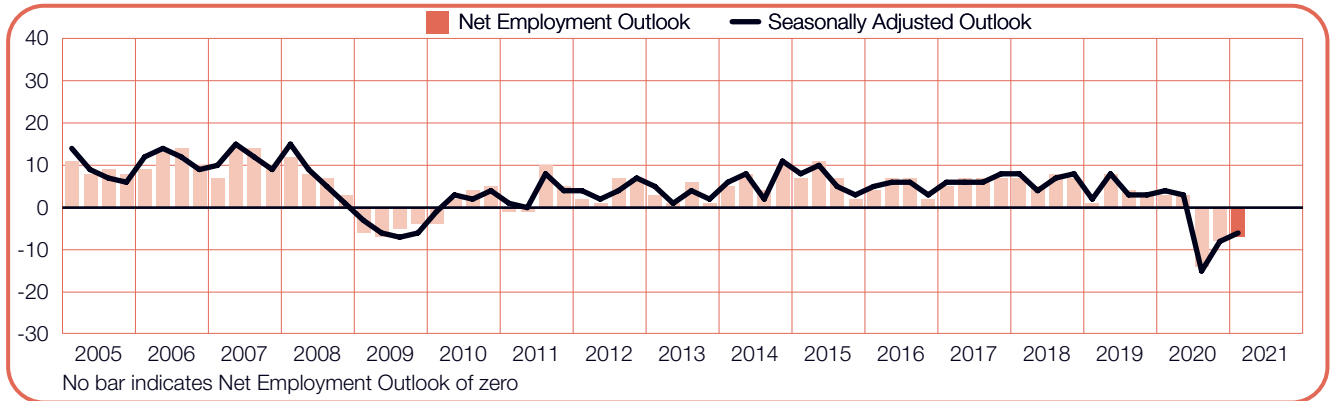
Job seekers in the Hotels & Restaurants sub-sector can expect the weakest hiring climate since the analysis was first carried out in 2005, according to employers who report a Net Employment Outlook of -28%, the third consecutive dim forecast. The Outlook weakens by 14 percentage points quarter-over-quarter and by 31 percentage points when compared with this time one year ago.



**-7 (-6)%**

## Manufacturing

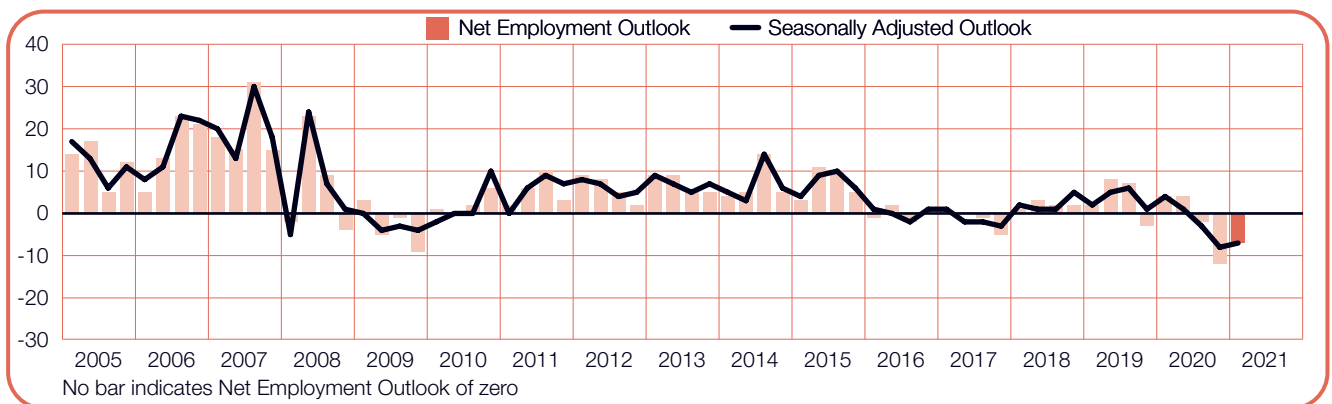
Employers continue to report a struggling labour market with a Net Employment Outlook of -6% for the coming quarter. The Outlook is the third consecutive negative forecast, improving by two percentage points quarter-over-quarter, but declining by 10 percentage points year-over-year.



**-7 (-7)%**

## Mining

With a Net Employment Outlook for the January to March period of -7%, employers continue to report pessimistic hiring plans. Hiring sentiment remains relatively stable in comparison with the prior quarter, but is 11 percentage points weaker when compared with last year at this time.



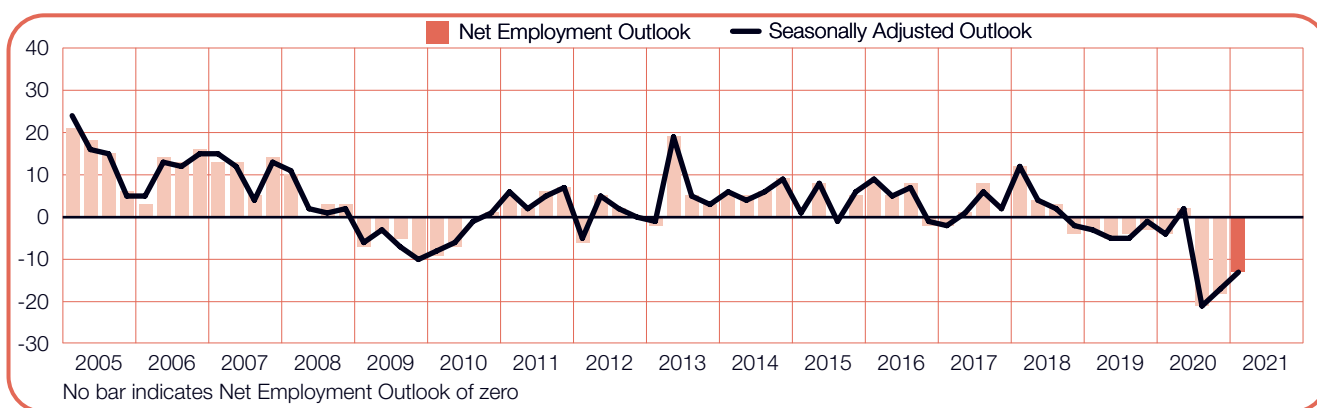
**-13 (-13)%**

## Transport & Communications

Job seekers can expect the gloomy hiring climate to continue in Quarter 1 2021, according to employers who report a Net Employment Outlook of -13%, the third consecutive dim forecast. The Outlook is four percentage points stronger when compared with the previous quarter, but decreases by nine percentage points year-over-year.

Transport sub-sector employers report dim hiring prospects for the coming quarter with a Net Employment Outlook of -23%, the third consecutive gloomy forecast. Hiring plans are unchanged in comparison with the prior quarter, but decline by 17 percentage points when compared with this time one year ago.

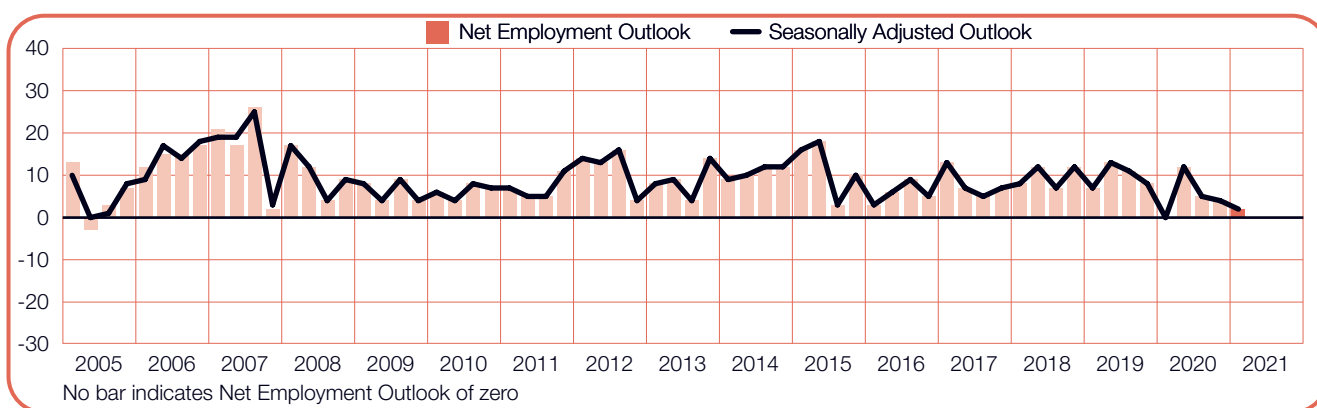
In the Telecomms sub-sector, employers anticipate the strongest labour market in five years, reporting a Net Employment Outlook of +15%. Hiring intentions improve by three percentage points quarter-over-quarter and are 18 percentage points stronger in comparison with the same period last year.



**+2 (+2)%**

## Utilities

Employers anticipate limited payroll gains in the first quarter of 2021, reporting a Net Employment Outlook of +2%. The Outlook declines by two percentage points in comparison with the prior quarter, but is two percentage points stronger year-over-year.





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# Global Employment Outlook

ManpowerGroup interviewed over 37,500 employers in 43 countries and territories on hiring prospects\* in the first quarter of 2021. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of March 2021 as compared to the current quarter?” Interviewing was carried out during the exceptional circumstances of the COVID-19 outbreak. The survey findings for the January to March 2021 time frame reflect the impact of the global health emergency, and the ongoing economic restrictions in many countries.

In 34 of the 43 countries and territories surveyed by ManpowerGroup employers expect to add to payrolls during the first quarter of 2021. Employers expect to trim payrolls in seven countries and territories during the coming quarter, while flat labour markets are forecast in two.

Hiring sentiment strengthens in 32 countries and territories when compared with the previous quarter, while declining in six and remaining unchanged in five. In a comparison with this time one year ago, employers in 33 countries and territories report weaker hiring intentions, while Outlooks strengthen in six and are unchanged in four. During the next three months, employers anticipate the strongest hiring activity in Taiwan, the U.S., Singapore, Australia and Brazil. The weakest labour markets are expected in Panama, the UK, Switzerland, Austria and Hong Kong.

Employers expect to add to payrolls in 19 of the 26 Europe, Middle East & Africa (EMEA) region countries during the upcoming quarter, while a decline in payrolls is anticipated in five and flat hiring activity in two. Hiring prospects improve in 18 EMEA countries in comparison with the prior quarter, but weaken in 24 countries when compared with last year at this time. The strongest hiring plans for the next three months are reported in Greece, Germany and Turkey, while employers in the UK, Switzerland and Austria anticipate the weakest labour markets.

Workforce gains are expected in six of the seven Asia Pacific countries and territories during the first quarter of 2021, with a decrease in payrolls anticipated in one. When compared with the previous quarter, hiring plans improve in four countries and territories, while weakening in one. In a year-over-year comparison, Outlooks decline in four countries and territories, but strengthen in one. Employers in Taiwan anticipate the strongest regional labour market followed by Singapore and Australia. Meanwhile, employers in Hong Kong report the weakest forecast in the region, expecting to trim payrolls.

Positive hiring activity is expected in nine of the 10 Americas countries during the January to March period, while payrolls are expected to decrease in one. In a quarter-over-quarter comparison, hiring sentiment strengthens in all 10 Americas countries, while Outlooks strengthen in four countries but weaken in five when compared with last year at this time. Employers in the U.S. and Brazil anticipate the strongest hiring activity during the coming quarter, but employers expect to trim payrolls 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](http://www.manpowergroup.com/meos)

The next ManpowerGroup Employment Outlook Survey will be released on 9 March 2021 and will detail expected labour market activity for the second quarter of 2021.

\* Commentary is based on seasonally adjusted data where available. Data is not seasonally adjusted for Croatia or Portugal.

	Quarter 1 2021	Qtr on Qtr Change Q4 2020 to Q1 2021	Yr on Yr Change Q1 2020 to Q1 2021
	%		
<b>Americas</b>			
Argentina	6 (5) <sup>1</sup>	9 (7) <sup>1</sup>	5 (5) <sup>1</sup>
Brazil	9 (10) <sup>1</sup>	15 (13) <sup>1</sup>	0 (0) <sup>1</sup>
Canada	3 (7) <sup>1</sup>	0 (1) <sup>1</sup>	-3 (-3) <sup>1</sup>
Colombia	5 (6) <sup>1</sup>	15 (14) <sup>1</sup>	-5 (-5) <sup>1</sup>
Costa Rica	4 (2) <sup>1</sup>	20 (16) <sup>1</sup>	1 (1) <sup>1</sup>
Guatemala	8 (9) <sup>1</sup>	13 (15) <sup>1</sup>	1 (1) <sup>1</sup>
Mexico	7 (8) <sup>1</sup>	7 (7) <sup>1</sup>	-1 (-1) <sup>1</sup>
Panama	-6 (-7) <sup>1</sup>	12 (13) <sup>1</sup>	-6 (-6) <sup>1</sup>
Peru	8 (8) <sup>1</sup>	9 (8) <sup>1</sup>	4 (4) <sup>1</sup>
United States	15 (17) <sup>1</sup>	3 (3) <sup>1</sup>	-2 (-2) <sup>1</sup>

<b>Asia Pacific</b>			
Australia	12 (10) <sup>1</sup>	10 (9) <sup>1</sup>	0 (0) <sup>1</sup>
China	6 (5) <sup>1</sup>	2 (0) <sup>1</sup>	-1 (-1) <sup>1</sup>
Hong Kong	-2 (-2) <sup>1</sup>	0 (0) <sup>1</sup>	-13 (-13) <sup>1</sup>
India	6 (5) <sup>1</sup>	2 (2) <sup>1</sup>	-4 (-4) <sup>1</sup>
Japan	6 (6) <sup>1</sup>	1 (-3) <sup>1</sup>	-18 (-18) <sup>1</sup>
Singapore	15 (15) <sup>1</sup>	18 (17) <sup>1</sup>	7 (7) <sup>1</sup>
Taiwan	21 (23) <sup>1</sup>	3 (2) <sup>1</sup>	0 (0) <sup>1</sup>

<b>EMEA†</b>			
Austria	-7 (-2) <sup>1</sup>	-4 (0) <sup>1</sup>	-11 (-11) <sup>1</sup>
Belgium	6 (6) <sup>1</sup>	6 (5) <sup>1</sup>	-6 (-6) <sup>1</sup>
Bulgaria	0 (4) <sup>1</sup>	2 (4) <sup>1</sup>	-4 (-4) <sup>1</sup>
Croatia	0	6	-5
Czech Republic	-1 (1) <sup>1</sup>	-2 (-2) <sup>1</sup>	-4 (-4) <sup>1</sup>
Finland	-1 (3) <sup>1</sup>	6 (2) <sup>1</sup>	-5 (-6) <sup>1</sup>
France	-2 (0) <sup>1</sup>	-4 (-4) <sup>1</sup>	-13 (-13) <sup>1</sup>
Germany	4 (8) <sup>1</sup>	1 (5) <sup>1</sup>	1 (1) <sup>1</sup>
Greece	3 (9) <sup>1</sup>	3 (2) <sup>1</sup>	-16 (-16) <sup>1</sup>
Hungary	0 (3) <sup>1</sup>	-2 (0) <sup>1</sup>	-4 (-4) <sup>1</sup>
Ireland	3 (7) <sup>1</sup>	7 (9) <sup>1</sup>	-1 (-1) <sup>1</sup>
Israel	3 (4) <sup>1</sup>	5 (4) <sup>1</sup>	-3 (-3) <sup>1</sup>
Italy	0 (3) <sup>1</sup>	4 (3) <sup>1</sup>	-3 (-3) <sup>1</sup>
Netherlands	2 (4) <sup>1</sup>	4 (6) <sup>1</sup>	-5 (-5) <sup>1</sup>
Norway	1 (2) <sup>1</sup>	3 (2) <sup>1</sup>	-9 (-9) <sup>1</sup>
Poland	2 (5) <sup>1</sup>	-3 (0) <sup>1</sup>	-1 (-1) <sup>1</sup>
Portugal	5	3	-5
Romania	-3 (3) <sup>1</sup>	2 (2) <sup>1</sup>	-14 (-14) <sup>1</sup>
Slovakia	-4 (-1) <sup>1</sup>	-3 (-2) <sup>1</sup>	-4 (-4) <sup>1</sup>
Slovenia	-1 (1) <sup>1</sup>	-1 (2) <sup>1</sup>	-7 (-7) <sup>1</sup>
South Africa	2 (2) <sup>1</sup>	14 (14) <sup>1</sup>	0 (0) <sup>1</sup>
Spain	-4 (-1) <sup>1</sup>	1 (3) <sup>1</sup>	-6 (-6) <sup>1</sup>
Sweden	2 (7) <sup>1</sup>	6 (7) <sup>1</sup>	-3 (-2) <sup>1</sup>
Switzerland	-4 (-4) <sup>1</sup>	-4 (-5) <sup>1</sup>	-8 (-9) <sup>1</sup>
Turkey	3 (8) <sup>1</sup>	-4 (-2) <sup>1</sup>	-2 (-3) <sup>1</sup>
<b>UK</b>	<b>-6 (-6)<sup>1</sup></b>	<b>2 (2)<sup>1</sup></b>	<b>-7 (-7)<sup>1</sup></b>



†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.

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# About the 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:** For Quarter 1 2021, sample sizes are smaller than other quarters, reflecting the impact of the global health emergency so total number of interviews is significantly lower than normal in some countries. The survey is based on interviews with over 37,500 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 1 2021 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 March 2021 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 almost all national, regional and global data is not greater than +/- 5%.

In the UK, the national survey includes 1,306 employers. With this number of interviews, the margin of error for the UK survey is +/- 2.1%.

## 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.

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# About ManpowerGroup™

ManpowerGroup® (NYSE: MAN), the leading global workforce solutions company, helps organisations 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 organisations 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 more than 75 countries and territories and has done so for over 70 years. We are recognised consistently for our diversity – as a best place to work for Women, Inclusion, Equality and Disability and in 2020 ManpowerGroup was named one of the World's Most Ethical Companies for the eleventh year – all confirming our position as the brand of choice for in-demand talent.

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