

**ManpowerGroup  
Employment  
Outlook Survey  
Belgium**

**Q2  
2021**



# Belgium Employment Outlook

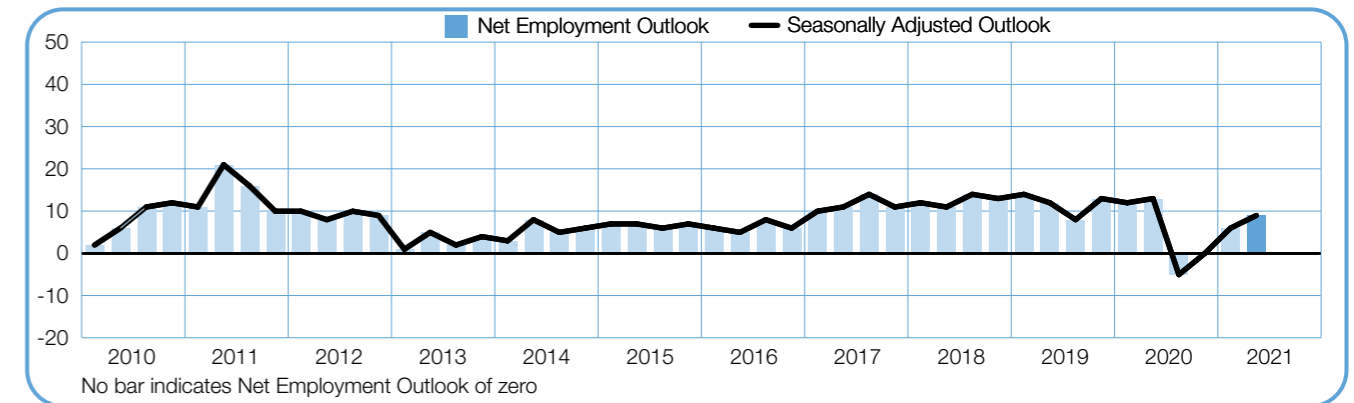
The ManpowerGroup Employment Outlook Survey for the second quarter of 2021 was conducted by interviewing a representative sample of 474 employers in Belgium.

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 2021 as compared to the current quarter?”

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## Belgium Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>April-June 2021</b>	<b>13</b>	<b>4</b>	<b>80</b>	<b>3</b>	<b>9</b>	<b>8</b>
Jan-March 2021	13	7	73	7	6	6
Oct-Dec 2020	11	11	73	5	0	1
July-Sept 2020	11	16	62	11	-5	-6
April-June 2020	15	2	82	1	13	13



The ManpowerGroup Employment Outlook Survey for the second quarter 2021 was conducted by interviewing a representative sample of 474 employers in Belgium. 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 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 second quarter of 2021 are likely to reflect the impact of the global health emergency, and may be notably different to previous quarters.

Belgian employers report encouraging signs for job seekers in the second quarter of 2021. With 13% of employers expecting to increase payrolls, 4% forecasting a decrease and 80% anticipating no change, the resulting Net Employment Outlook is +9%.

Once the data is adjusted to allow for seasonal variation, the Outlook stands at +8%. Hiring plans improve by 2 percentage points when compared with the previous quarter, but decline by 5 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.

*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

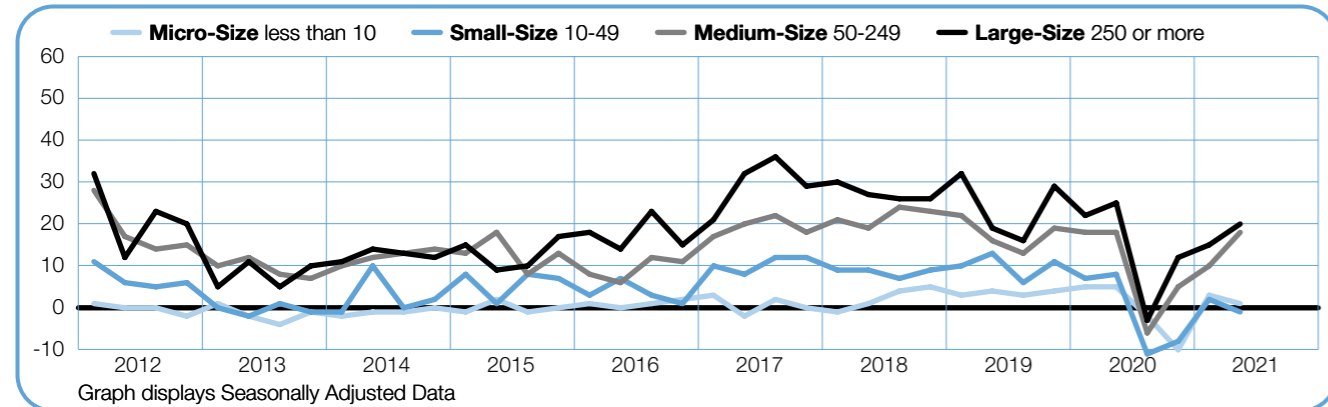
Participating employers are categorized into one of four organization sizes: Micro businesses have less than 10 employees; Small businesses have 10-49 employees; Medium businesses have 50-249 employees; and Large businesses have 250 or more employees.

Large- and Medium-size employers report upbeat hiring intentions for the second quarter of 2021, with Net Employment Outlooks of +20% and +18%, respectively. Meanwhile, Micro employers forecast a quiet labor market with an Outlook of +1%, and Small employers report a subdued Outlook of -1%.

Hiring plans improve for Medium- and Large-size firms when compared with the previous quarter, increasing by 8 and 5 percentage points, respectively. However, the Outlook for Small employers declines by 3 percentage points, while Micro employers report a decrease of 2 percentage points.

When compared with the same period last year, hiring prospects weaken in three of the four organization size categories. Small employers report the most notable decrease of 9 percentage points, while Outlooks decline by 5 and 4 percentage points in the Large- and Micro-size categories, respectively. Elsewhere, the Outlook for Medium firms is unchanged.

Organisation-Size	Increase %	Decrease %	No Change %	Don't Know %	Net Employment Outlook %	Seasonally Adjusted %
<b>Micro-Size</b> less than 10	6	4	89	1	2	1
<b>Small-Size</b> 10-49	6	5	86	3	1	-1
<b>Medium-Size</b> 50-249	21	3	72	4	18	18
<b>Large-Size</b> 250 or more	24	4	66	6	20	20

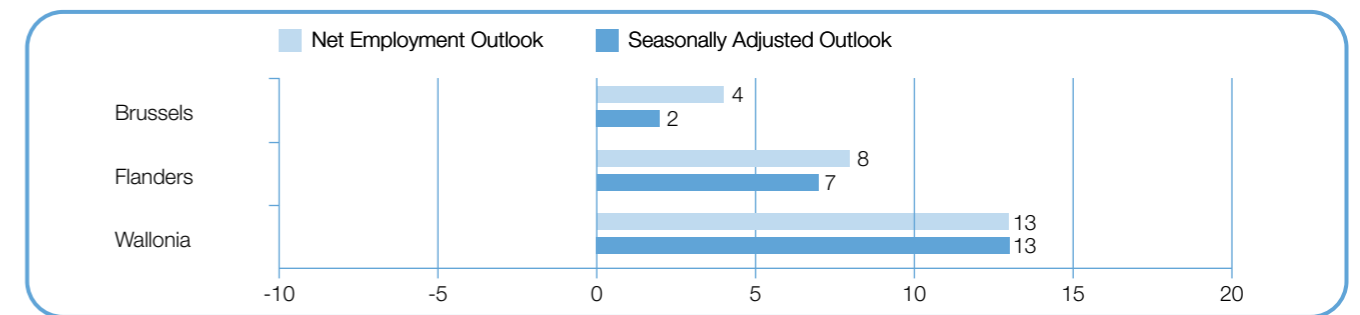


# Regional Comparisons

Employers in all three regions expect to grow payrolls during the next three months. The strongest hiring prospects are reported in Wallonia where the Net Employment Outlook is +13%. Elsewhere, Flanders employers anticipate modest hiring activity with an Outlook of +7%, while the Brussels Outlook stands at +2%.

Hiring plans strengthen in Wallonia and Flanders when compared with the previous quarter, improving by 4 and 2 percentage points, respectively. Meanwhile, the Brussels Outlook remains unchanged.

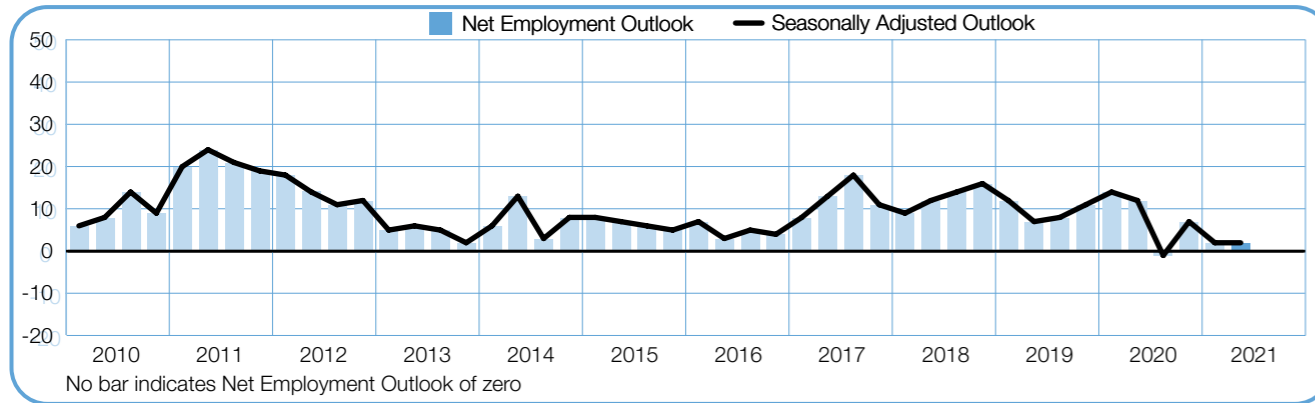
When compared with this time one year ago, hiring sentiment weakens in both Brussels and Flanders, declining by 10 and 8 percentage points, respectively. However, Wallonia employers report an improvement of 8 percentage points.



**+4 (+2)%**

## Brussels

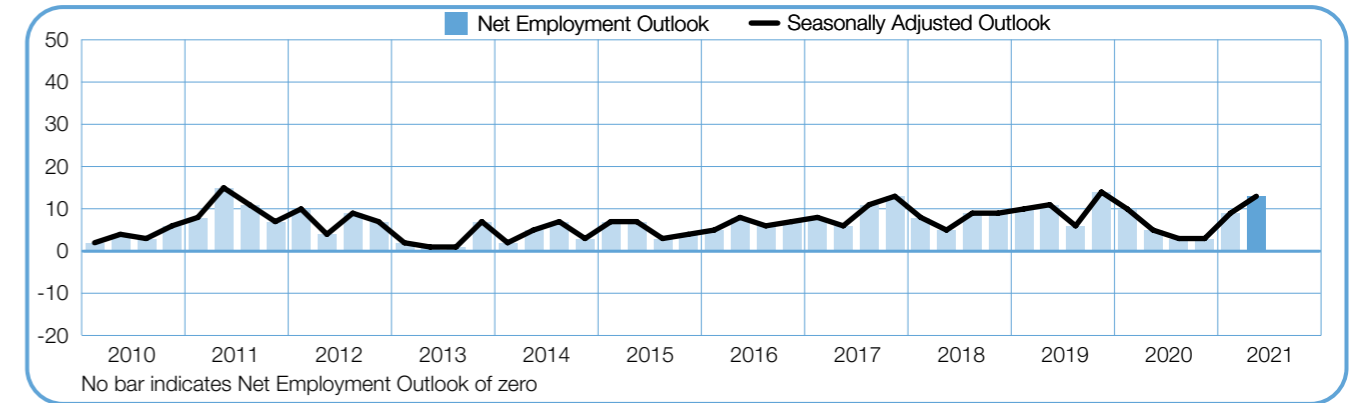
With a Net Employment Outlook of +2%, employers expect limited hiring activity during the second quarter of 2021. Hiring intentions are unchanged when compared with the previous quarter, but decline by 10 percentage points in comparison with 2Q 2020.



**+13 (+13)%**

## Wallonia

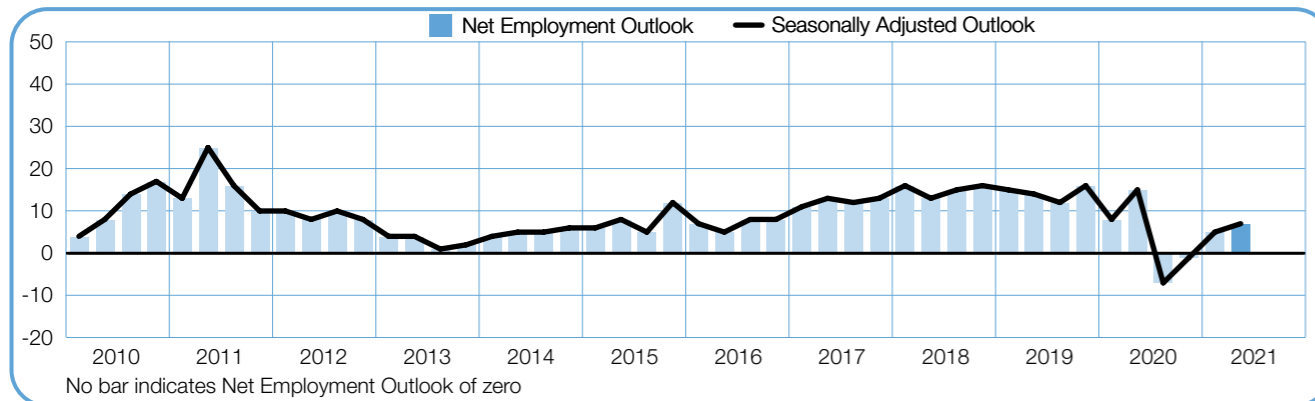
Job seekers can expect a positive labor market in the April to June period, according to employers who report a Net Employment Outlook of +13%. The Outlook improves by 4 percentage points in comparison with the prior quarter, and is 8 percentage points stronger when compared with the same period last year.



**+8 (+7)%**

## Flanders

Employers forecast a moderate hiring pace for the upcoming quarter with a Net Employment Outlook of +7%. Hiring prospects are 2 percentage points stronger quarter-over-quarter, but decline by 8 percentage points when compared with this time one year ago.



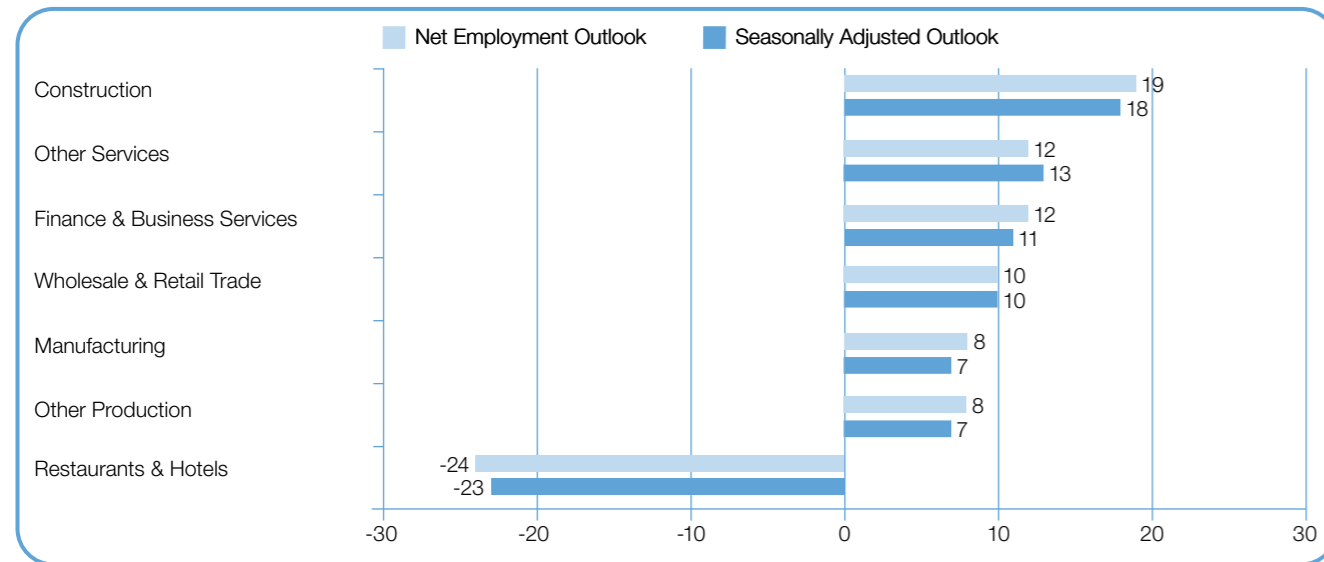
# Sector Comparisons

Workforce gains are anticipated in six of the seven industry sectors during the second quarter of 2021. The strongest labor market is forecast by Construction sector employers who report a Net Employment Outlook of +18%. Steady hiring activity is also expected in the Other Services sector, where the Outlook is +13%, while Outlooks stand at +11% and +10% in the Finance & Business Services sector and the Wholesale & Retail Trade sector, respectively. In both the Manufacturing sector and the Other Production sector, employers forecast some job gains, reporting Outlooks of +7%. However, a gloomy hiring climate is expected in the Restaurants & Hotels sector, where the Outlook is -23%.

Hiring sentiment strengthens in five of the seven industry sectors when compared with the previous quarter, most notably by 8 percentage points in the

Construction sector. Finance & Business Services sector employers report an increase of 7 percentage points, and Outlooks are 4 and 2 percentage points stronger in the Wholesale & Retail Trade sector and the Manufacturing sector, respectively. Meanwhile, Restaurants & Hotels sector employers report a decline of 6 percentage points.

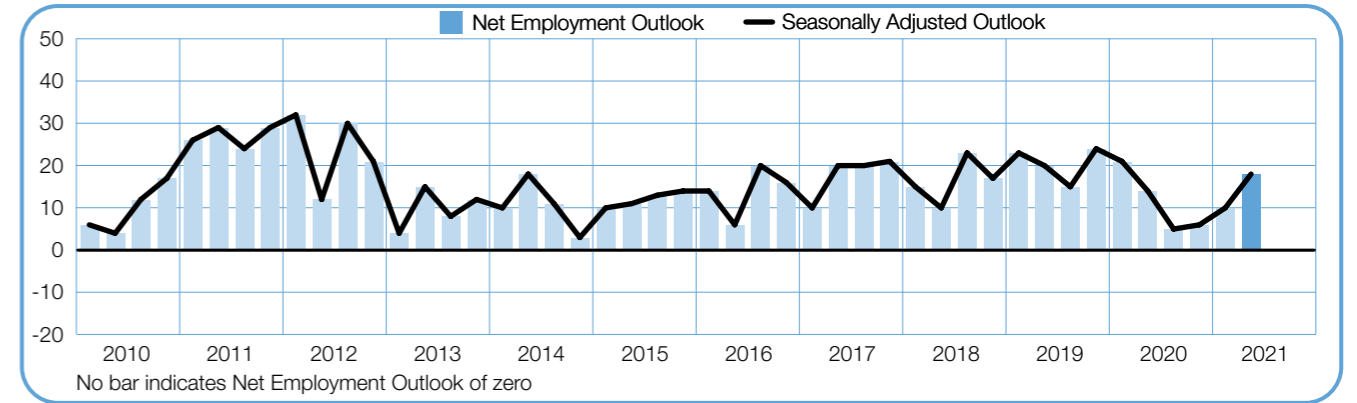
In a comparison with this time one year ago, hiring plans weaken in four of the seven industry sectors, including a steep decline of 35 percentage points reported by Restaurants & Hotels sector employers. Elsewhere, Manufacturing sector employers report a considerable decrease of 11 percentage points and the Other Production sector Outlook declines by 2 percentage points. However, hiring intentions strengthen in two sectors, most notably by 4 percentage points in the Construction sector.



**+19 (+18)%**

## Construction

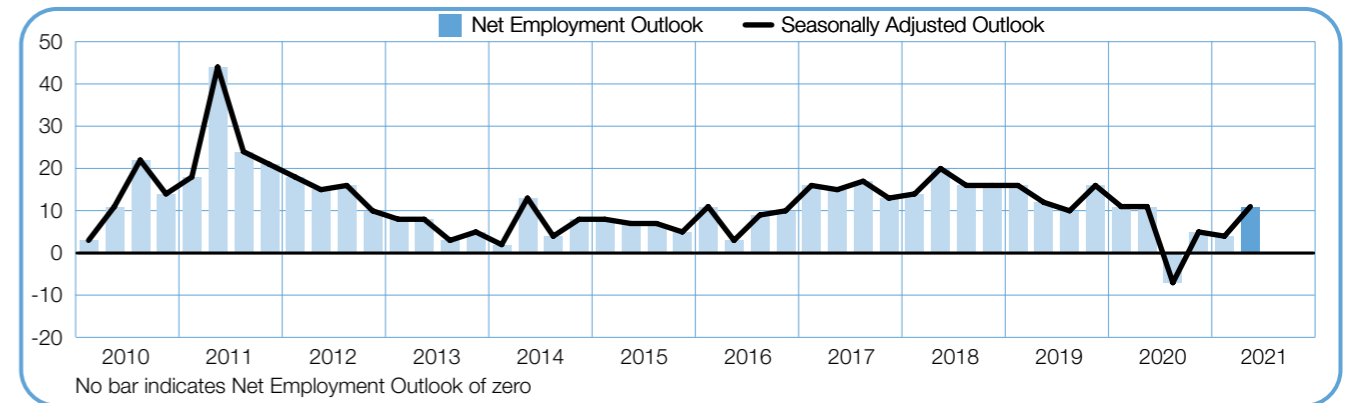
Reporting a Net Employment Outlook of +18%, employers anticipate a steady hiring pace in the second quarter of 2021. Hiring prospects improve by 8 percentage points when compared with the previous quarter and by 4 percentage points year-over-year.



**+12 (+11)%**

## Finance & Business Services

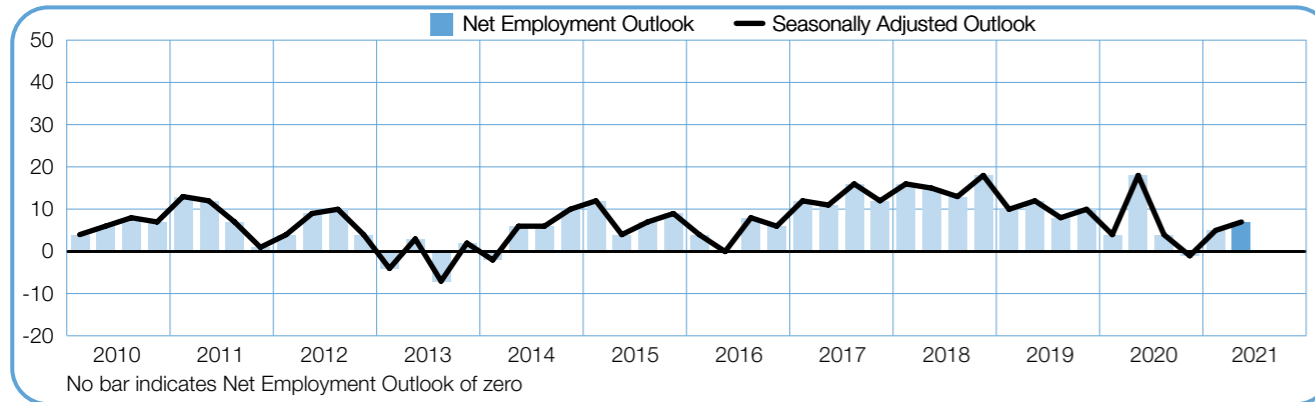
Respectable workforce gains are forecast for the next three months with employers reporting a Net Employment Outlook of +11%. Hiring intentions improve by 7 percentage points when compared with the previous quarter and are unchanged year-over-year.



**+8 (+7)%**

## Manufacturing

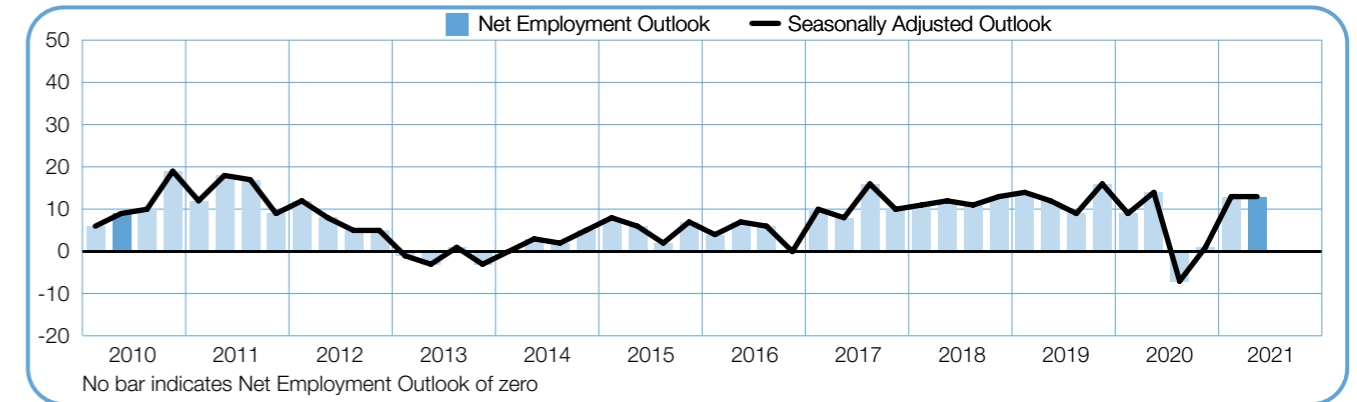
Employers anticipate some payroll gains during the forthcoming quarter, reporting a Net Employment Outlook of +7%. Hiring sentiment is 2 percentage points stronger quarter-over-quarter, but declines by 11 percentage points when compared with this time one year ago.



**+12 (+13)%**

## Other Services (Public & Social, Transport, Storage & Communication)

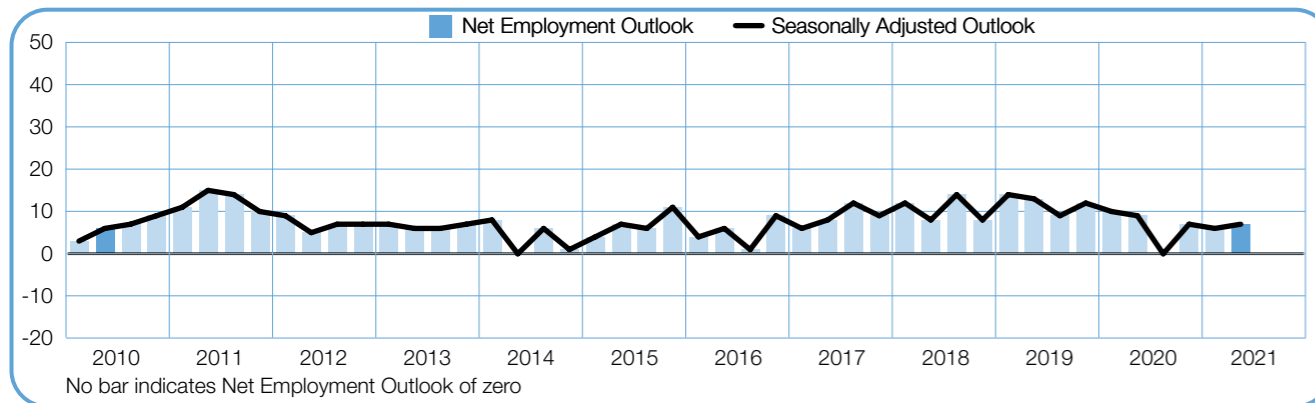
Employers expect the favorable hiring climate to continue in the coming quarter, reporting a Net Employment Outlook of +13% for the second consecutive quarter. When compared with last year at this time, hiring plans remain relatively stable.



**+8 (+7)%**

## Other Production (Agriculture, Hunting, Forestry & Fishing, Electricity, Gas & Water, Mining & Quarrying)

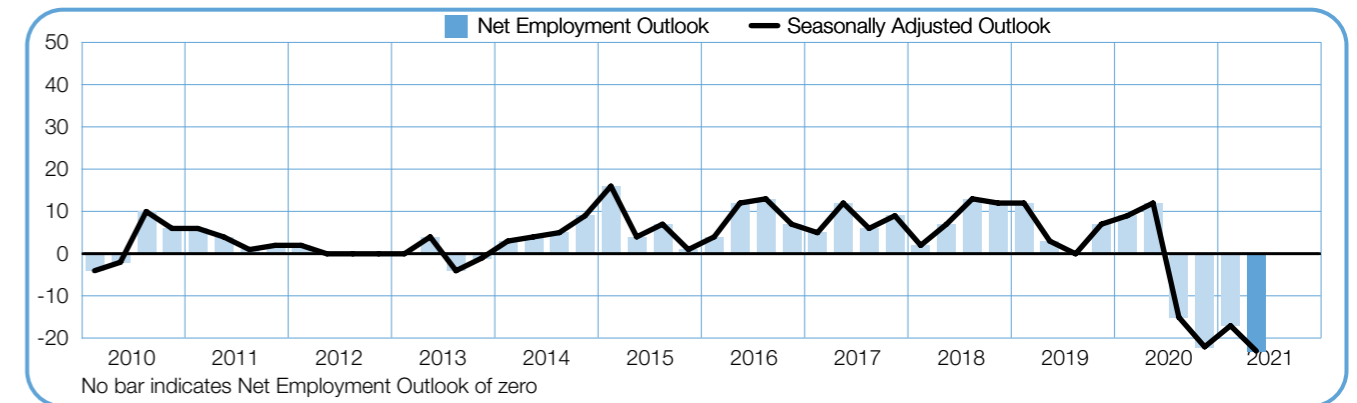
Job seekers can expect a mild hiring climate in the April to June period, according to employers who report a Net Employment Outlook of +7%. The Outlook remains relatively stable in comparison with the prior quarter, but decreases by 2 percentage points when compared with the same period last year.



**-24 (-23)%**

## Restaurants & Hotels

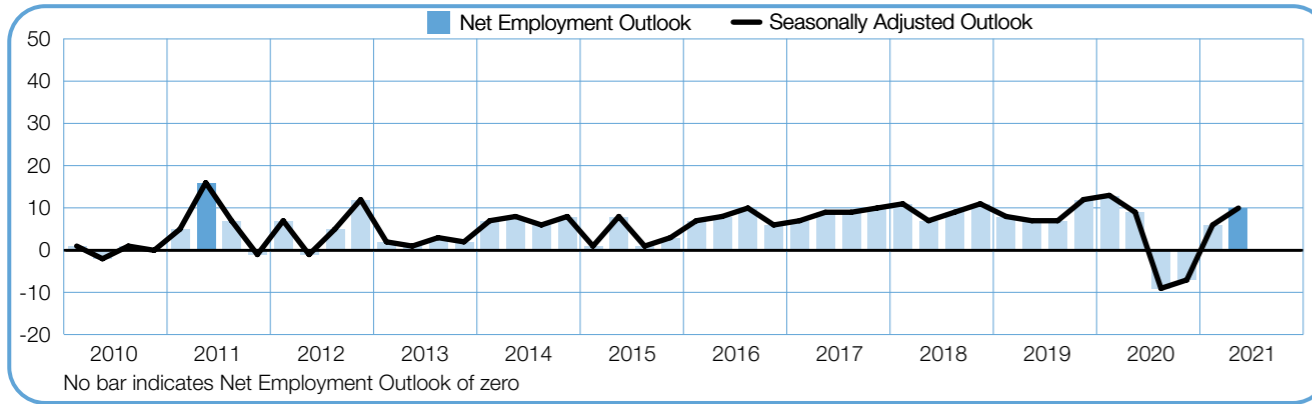
The weakest labor market since the survey began in 2003 is expected in the second quarter of 2021. Employers report a dim Net Employment Outlook of -23%, the fourth consecutive negative forecast, declining by 6 percentage points quarter-over-quarter and by a steep margin of 35 percentage points when compared with this time one year ago.



**+10 (+10)%**

## Wholesale & Retail Trade

With a Net Employment Outlook of +10%, employers anticipate a fair hiring pace during the next three months. Hiring prospects are 4 percentage points stronger when compared with the previous quarter and remain relatively stable in comparison with 2Q 2020.



## Global Employment Outlook

ManpowerGroup interviewed over 42,000 employers in 43 countries and territories on hiring prospects\* in the second 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 June 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 April to June 2021 time frame reflect the impact of the global health emergency, and the ongoing economic restrictions in many countries.

Employers expect to add to payrolls in 31 of the 43 countries and territories surveyed by ManpowerGroup for the second quarter of 2021. In 10 countries and territories, employers anticipate a decrease in payrolls, while no change is expected in two.

When compared with the previous quarter, hiring intentions strengthen in 24 countries and territories, while weakening in 16, with no change reported in three. In a comparison with the same period 12 months ago, hiring plans weaken in 32 countries and territories, while improving in seven and remaining unchanged in four. For the second quarter of 2021, the strongest labor markets are forecast in Taiwan, the U.S., Australia and Singapore, while employers in Panama, the UK and South Africa anticipate the weakest hiring activity.

In the Europe, Middle East & Africa (EMEA) region, workforce gains are expected during the next three months for 18 of the 26 countries surveyed, while employers in six countries expect to trim payrolls and flat hiring prospects are reported for two. Hiring plans strengthen in 16 EMEA countries when compared with the previous quarter, but weaken in 20 in a comparison with the same period last year. The strongest labor markets in the coming quarter are anticipated by employers in Croatia, Romania and Turkey, while employers in South Africa and the UK expect the weakest hiring activity.

An increase in payrolls is expected in five of the seven Asia Pacific countries and territories in April to June 2021, while employers in two expect to trim payrolls. Hiring sentiment strengthens in four countries and territories quarter-over-quarter, but weakens in four when compared with the second quarter of 2020. The strongest hiring pace in the coming quarter is forecast for Taiwan, with employers in both Australia and Singapore reporting upbeat hiring plans. However, employers in both Hong Kong and Japan expect to trim payrolls.

Workforce gains are expected in eight of the 10 Americas countries during the second quarter of 2021, while employers in two expect to trim payrolls. Hiring prospects in the region strengthen in four countries when compared with the previous quarter, but weaken in six, and Outlooks decline in eight Americas countries when compared with this time one year ago. U.S. employers report the strongest hiring prospects in the region, with encouraging signs for job seekers reported in Brazil and Canada. However, employers in Panama and Peru expect to trim payrolls.

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 8 June 2021 and will detail expected labor market activity for the third quarter of 2021.

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

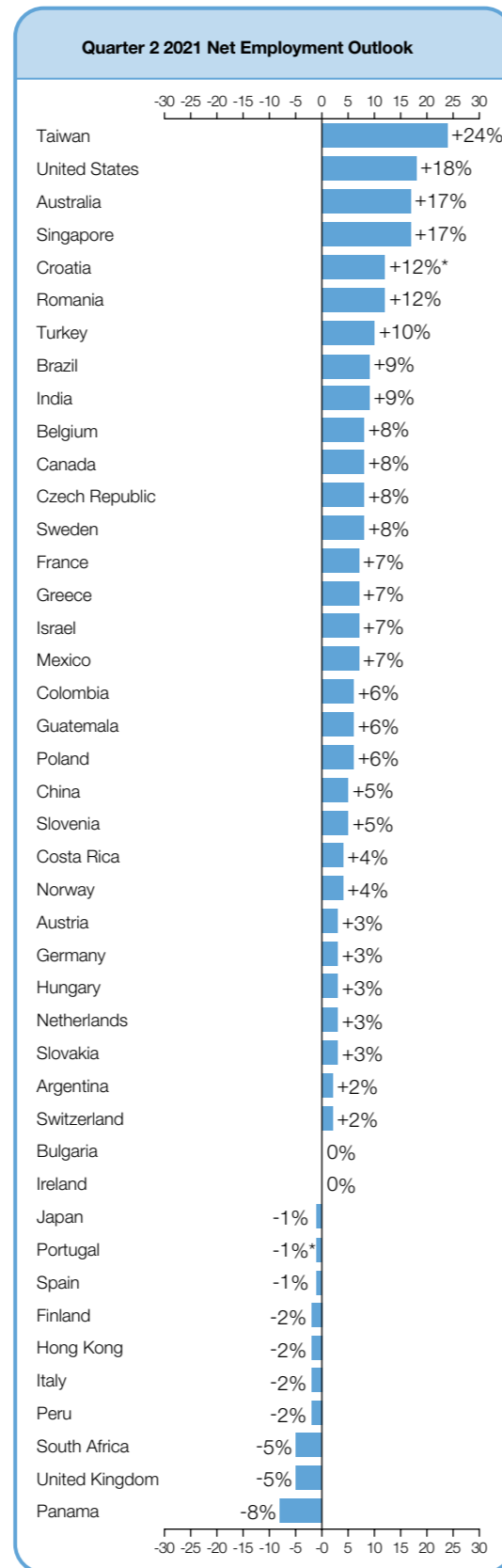
	Quarter 2 2021	Qtr on Qtr Change Q1 2021 to Q2 2021	Yr on Yr Change Q2 2020 to Q2 2021
	%		
<b>Americas</b>			
Argentina	4 (2) <sup>1</sup>	-2 (-3) <sup>1</sup>	0 (0) <sup>1</sup>
Brazil	13 (9) <sup>1</sup>	4 (-1) <sup>1</sup>	-4 (-4) <sup>1</sup>
Canada	11 (8) <sup>1</sup>	8 (1) <sup>1</sup>	0 (0) <sup>1</sup>
Colombia	6 (6) <sup>1</sup>	1 (1) <sup>1</sup>	-5 (-5) <sup>1</sup>
Costa Rica	6 (4) <sup>1</sup>	2 (2) <sup>1</sup>	-3 (-3) <sup>1</sup>
Guatemala	7 (6) <sup>1</sup>	-1 (-2) <sup>1</sup>	-4 (-4) <sup>1</sup>
Mexico	8 (7) <sup>1</sup>	1 (-1) <sup>1</sup>	-2 (-2) <sup>1</sup>
Panama	-7 (-8) <sup>1</sup>	-1 (-1) <sup>1</sup>	-6 (-6) <sup>1</sup>
Peru	0 (-2) <sup>1</sup>	-8 (-10) <sup>1</sup>	-7 (-7) <sup>1</sup>
United States	19 (18) <sup>1</sup>	4 (1) <sup>1</sup>	-1 (-1) <sup>1</sup>

<b>Asia Pacific</b>			
Australia	16 (17) <sup>1</sup>	4 (6) <sup>1</sup>	7 (7) <sup>1</sup>
China	5 (5) <sup>1</sup>	-1 (0) <sup>1</sup>	-1 (-1) <sup>1</sup>
Hong Kong	-2 (-2) <sup>1</sup>	0 (0) <sup>1</sup>	-2 (-2) <sup>1</sup>
India	10 (9) <sup>1</sup>	4 (3) <sup>1</sup>	-2 (-2) <sup>1</sup>
Japan	7 (-1) <sup>1</sup>	1 (-6) <sup>1</sup>	-22 (-23) <sup>1</sup>
Singapore	17 (17) <sup>1</sup>	2 (2) <sup>1</sup>	8 (8) <sup>1</sup>
Taiwan	25 (24) <sup>1</sup>	4 (1) <sup>1</sup>	1 (1) <sup>1</sup>

<b>EMEA<sup>†</sup></b>			
Austria	7 (3) <sup>1</sup>	14 (5) <sup>1</sup>	-3 (-3) <sup>1</sup>
Belgium	9 (8) <sup>1</sup>	3 (2) <sup>1</sup>	-4 (-5) <sup>1</sup>
Bulgaria	3 (0) <sup>1</sup>	3 (-3) <sup>1</sup>	-7 (-7) <sup>1</sup>
Croatia	12	12	-12
Czech Republic	8 (8) <sup>1</sup>	9 (7) <sup>1</sup>	3 (3) <sup>1</sup>
Finland	6 (-2) <sup>1</sup>	7 (-4) <sup>1</sup>	-7 (-7) <sup>1</sup>
France	8 (7) <sup>1</sup>	10 (6) <sup>1</sup>	-4 (-4) <sup>1</sup>
Germany	5 (3) <sup>1</sup>	1 (-5) <sup>1</sup>	-10 (-10) <sup>1</sup>
Greece	15 (7) <sup>1</sup>	12 (-2) <sup>1</sup>	-16 (-16) <sup>1</sup>
Hungary	5 (3) <sup>1</sup>	5 (1) <sup>1</sup>	-3 (-3) <sup>1</sup>
Ireland	3 (0) <sup>1</sup>	0 (-5) <sup>1</sup>	-10 (-10) <sup>1</sup>
Israel	9 (7) <sup>1</sup>	6 (2) <sup>1</sup>	0 (0) <sup>1</sup>
Italy	3 (-2) <sup>1</sup>	3 (-4) <sup>1</sup>	-9 (-10) <sup>1</sup>
Netherlands	5 (3) <sup>1</sup>	3 (-1) <sup>1</sup>	-9 (-9) <sup>1</sup>
Norway	6 (4) <sup>1</sup>	5 (2) <sup>1</sup>	-11 (-11) <sup>1</sup>
Poland	7 (6) <sup>1</sup>	5 (1) <sup>1</sup>	3 (3) <sup>1</sup>
Portugal	-1	-6	-14
Romania	18 (12) <sup>1</sup>	21 (8) <sup>1</sup>	-7 (-7) <sup>1</sup>
Slovakia	6 (3) <sup>1</sup>	10 (3) <sup>1</sup>	-1 (-2) <sup>1</sup>
Slovenia	10 (5) <sup>1</sup>	11 (4) <sup>1</sup>	1 (1) <sup>1</sup>
South Africa	-4 (-5) <sup>1</sup>	-6 (-7) <sup>1</sup>	-7 (-7) <sup>1</sup>
Spain	1 (-1) <sup>1</sup>	5 (0) <sup>1</sup>	-7 (-7) <sup>1</sup>
Sweden	11 (8) <sup>1</sup>	9 (2) <sup>1</sup>	-2 (-2) <sup>1</sup>
Switzerland	5 (2) <sup>1</sup>	9 (5) <sup>1</sup>	1 (0) <sup>1</sup>
Turkey	16 (10) <sup>1</sup>	13 (1) <sup>1</sup>	1 (1) <sup>1</sup>
UK	-5 (-5) <sup>1</sup>	1 (1) <sup>1</sup>	-10 (-10) <sup>1</sup>

<sup>†</sup>EMEA – Europe, Middle East and Africa.

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.



\* Indicates unadjusted data.

## International Comparisons – Americas

More than 16,000 employers in 10 countries across North, Central and South America were interviewed by ManpowerGroup on hiring plans for the second quarter of 2021. Employers in eight Americas countries expect job gains during the coming quarter, although employers in two – Panama and Peru – expect a decrease in payrolls.

U.S. employers continue to report the strongest hiring sentiment in the region – this has now been the case every quarter in more than three years. Payrolls are expected to grow in all 12 U.S. industry sectors during the next three months, but Outlooks in nine of the 12 remain weaker than in the second quarter of 2020, when interviewing took place before the main impact of the COVID-19 pandemic. Hiring intentions are strongest in the Leisure & Hospitality sector for the third consecutive quarter, with healthy hiring prospects also reported for the Transportation & Utilities and Wholesale & Retail Trade sectors.

In Canada, employers expect the conservative hiring pace to continue in the next three months, reporting relatively stable hiring activity quarter-over-quarter, and no change when compared with this time one year ago. Workforce gains are expected in all 10 Canadian industry sectors, with the strongest hiring pace expected by employers in the Durable Goods Manufacturing sector while employers in the Wholesale & Retail sector continue to report a soft labor market.

Mexican employers anticipate a modest hiring pace during the second quarter of 2021, but hiring sentiment remains more cautious than prior to the pandemic. While job gains are expected in all seven Mexican industry sectors, hiring plans for the Services and Transport & Communication sectors are soft, declining in comparison with both the prior quarter and last year at this time.

Panamanian employers expect the labor market slump to continue into the second quarter of 2021, reporting a sixth consecutive negative Outlook. Employers in the Commerce and Services sectors continue to trim payrolls, although Construction sector employers anticipate an uptick in hiring for the coming quarter. Employers in Guatemala expect some job gains, although the national Outlook remains weaker than before the pandemic. In Costa Rica, hiring intentions have returned to pre-pandemic levels, although prospects remain gloomy in the Construction sector.

In Brazil, employers continue to report cautiously optimistic hiring plans, fueled in part by a considerably stronger Outlook in the Services sector when compared with the prior quarter. Employers in the Manufacturing and Wholesale & Retail Trade sectors also expect steady workforce gains.

Employers in Colombia expect the modest hiring pace to continue in the next three months, driven in part by upbeat hiring plans in the Construction and Services sectors, where Outlooks have returned to pre-pandemic levels. However, hiring prospects in the Wholesale & Retail Trade sector remain downbeat.

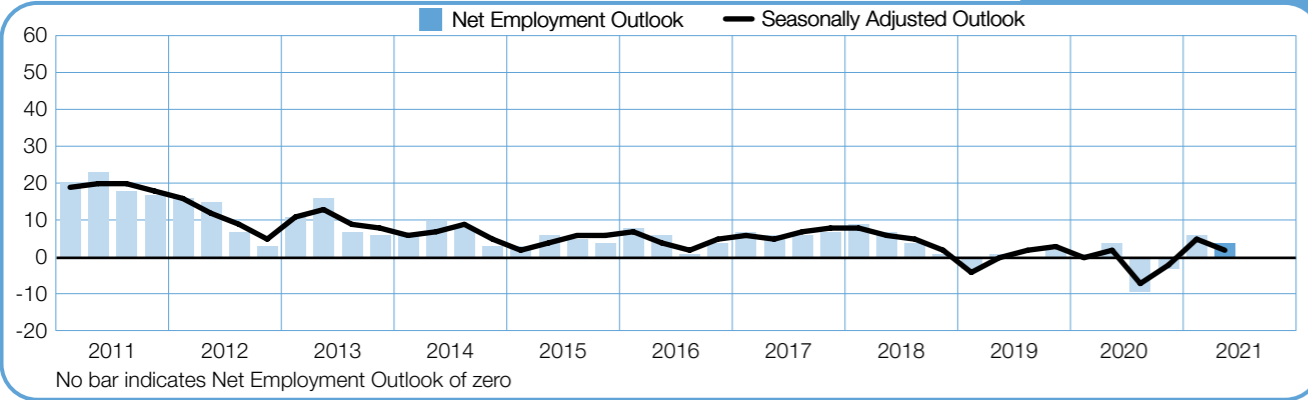
Hiring sentiment in Argentina has stalled following the strongest Outlook in two years reported in the first quarter of 2021. Hiring prospects weaken in six of nine industry sectors quarter-over-quarter, although slight upticks are reported for the Wholesale & Retail Trade and Mining sectors.

Peruvian employers also report weaker hiring confidence following the encouraging signs reported three months ago, with a decline in payrolls forecast for Quarter 2 2021. Employers expect to trim payrolls in six of the nine industry sectors, with notably weak hiring prospects in the Construction and Mining sectors, where Outlooks are the weakest in eight and five years, respectively.



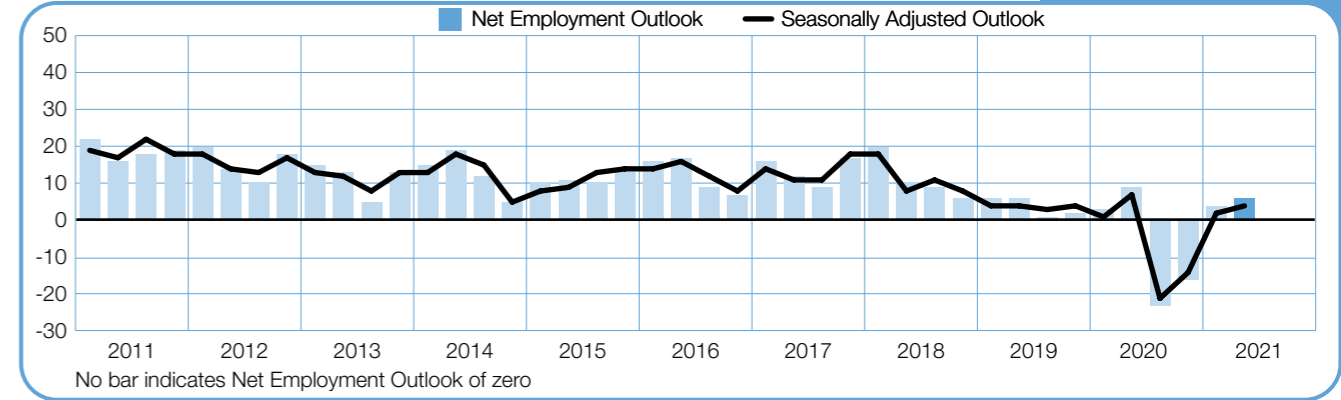
### Argentina

**+4 (+2)%**



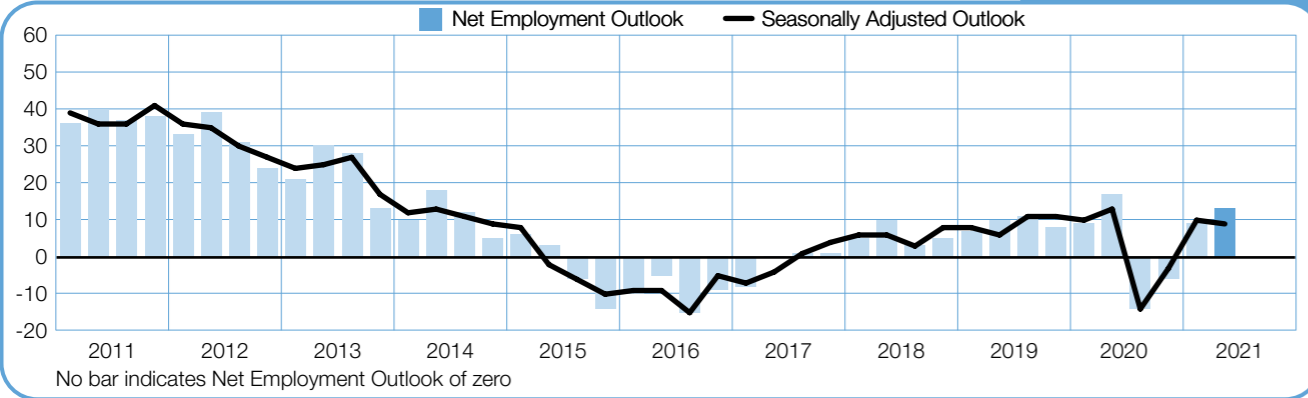
### Costa Rica

**+6 (+4)%**



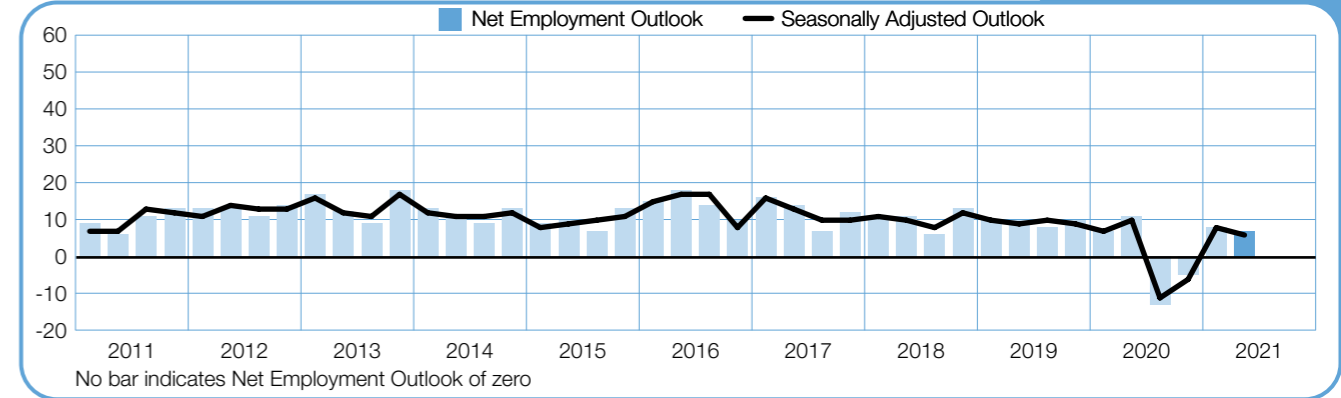
### Brazil

**+13 (+9)%**



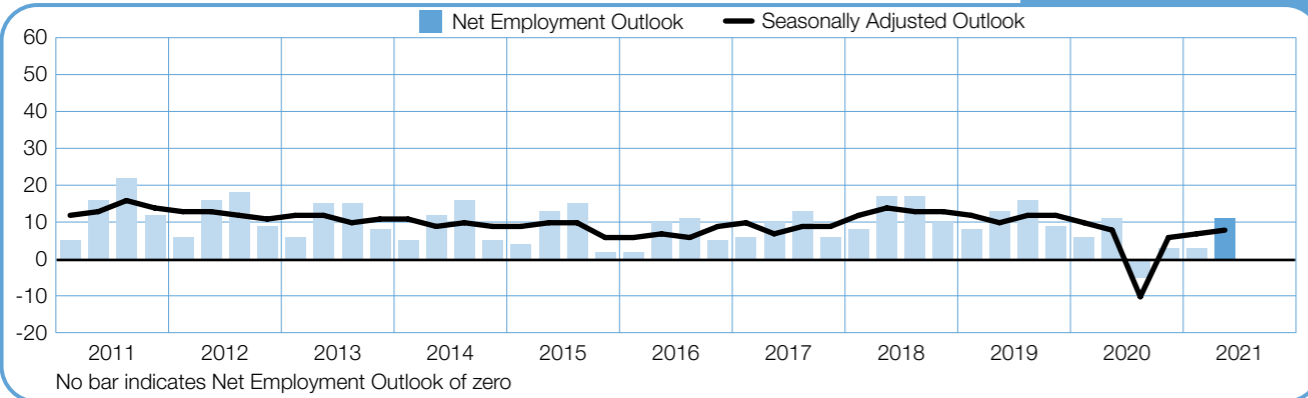
### Guatemala

**+7 (+6)%**



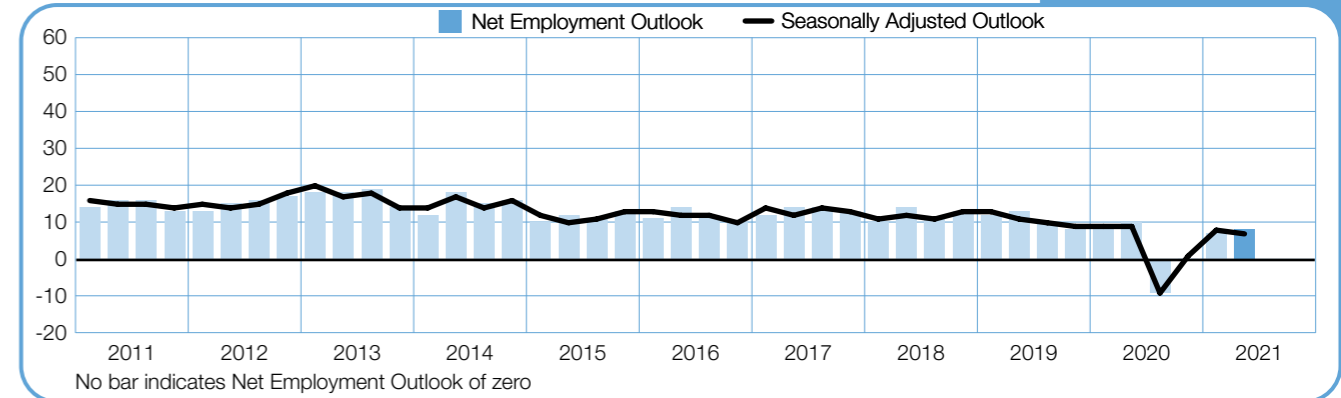
### Canada

**+11 (+8)%**



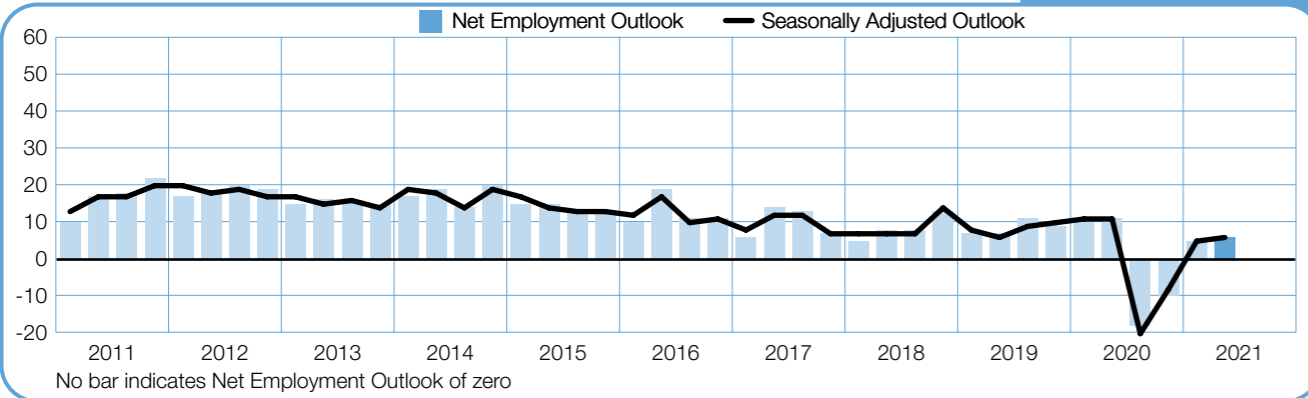
### Mexico

**+8 (+7)%**



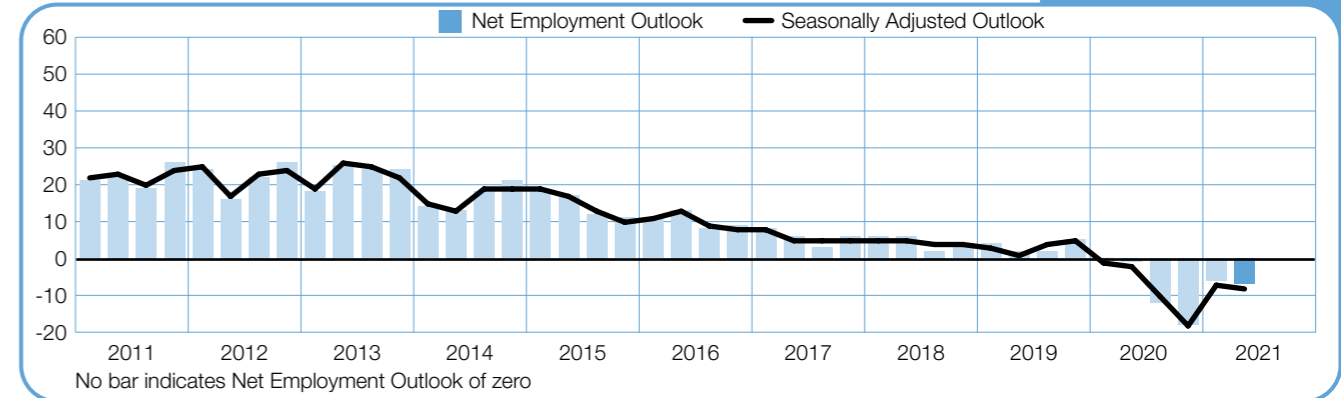
### Colombia

**+6 (+6)%**



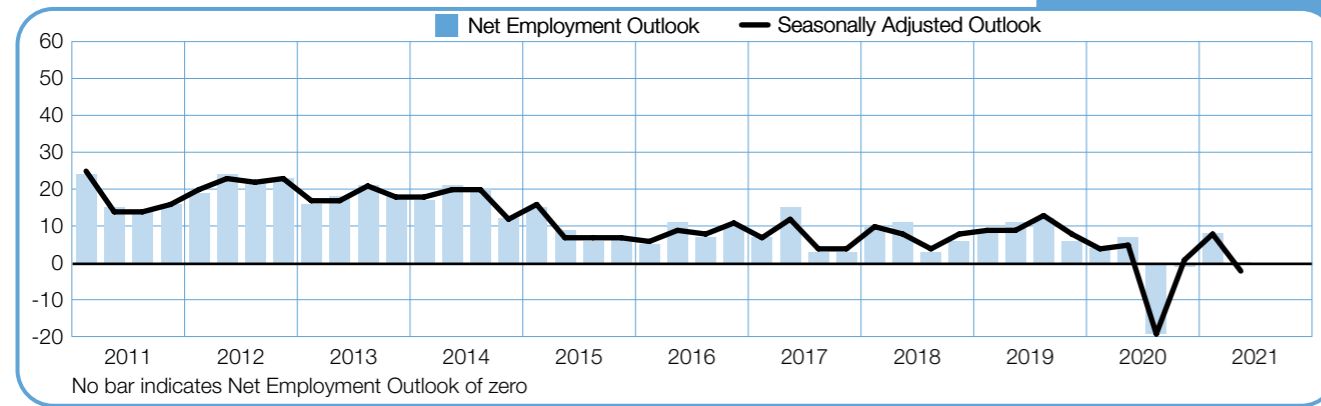
### Panama

**-7 (-8)%**



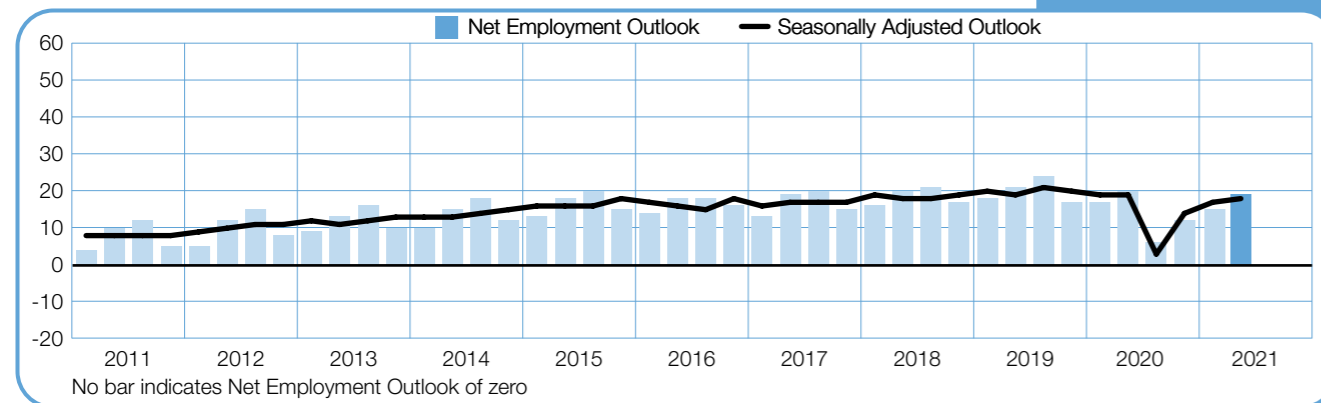
## Peru

0 (-2)%



## United States of America

+19 (+18)%



# International Comparisons – Asia Pacific

In the seven Asia Pacific countries and territories surveyed by ManpowerGroup, more than 10,700 employers were interviewed on their hiring plans for the upcoming quarter. Workforce gains are anticipated in five of the seven countries and territories, although employers in both Hong Kong and Japan expect to trim payrolls.

For the third consecutive quarter Taiwan's employers anticipate the strongest labor market of all the 43 countries and territories surveyed. Reporting their strongest hiring sentiment in three years they forecast solid workforce gains during the next three months, including in the Finance, Insurance & Real Estate, Manufacturing and Wholesale & Retail Trade sectors.

The strongest hiring pace in more than nine years is anticipated in Australia, with payroll gains expected in all seven industry sectors and all eight regions. Hiring confidence is particularly optimistic in the Finance, Insurance & Real Estate sector where the Outlook is the strongest in more than nine years, while Manufacturing sector employers expect the strongest labor market in 10 years.

Job seekers in Singapore can expect the strongest hiring intentions in six years during the coming quarter, according to employers. Workforce gains are anticipated in all seven industry sectors in the forthcoming quarter as the national forecast continues to improve for the third consecutive quarter.

Hiring intentions in the region's largest labor market hold steady, with employers in China continuing to anticipate modest payroll gains. Little noteworthy change is reported in China's six industry sectors and nine regions in comparison with the previous quarter, with the exception of the Mining & Construction sector, where hiring plans are the strongest in two years.

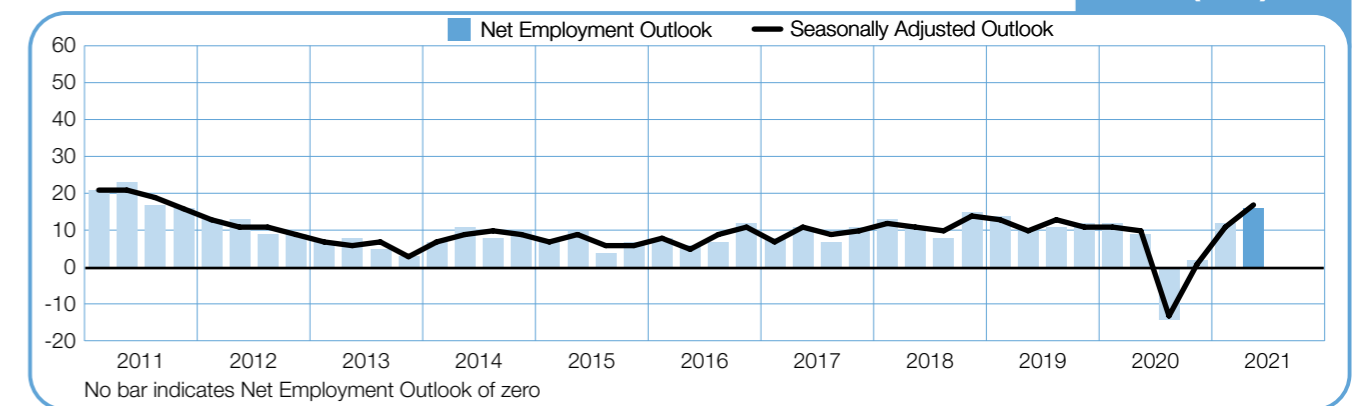
In India, hiring sentiment continues to recover slowly from the impact of the COVID-19 pandemic, improving when compared with the prior quarter. However, hiring prospects remain weaker when compared with this time one year ago, including in the Wholesale & Retail Trade and Finance, Insurance & Real Estate sectors.

Japanese employers report subdued hiring prospects for the second quarter of 2021 with the weakest – and first negative – Outlook in 11 years. Employers in the Manufacturing and Wholesale & Retail Trade sectors expect to trim payrolls, while hiring prospects in the Services and Mining & Construction sectors are the weakest in 10 years.

Hong Kong employers report subdued hiring sentiment for a fifth consecutive quarter. Downbeat hiring plans for the next three months are driven in part by the weakest Services sector forecast since the survey began in 2003, while Wholesale & Retail Trade sector employers report their weakest Outlook in 12 years.

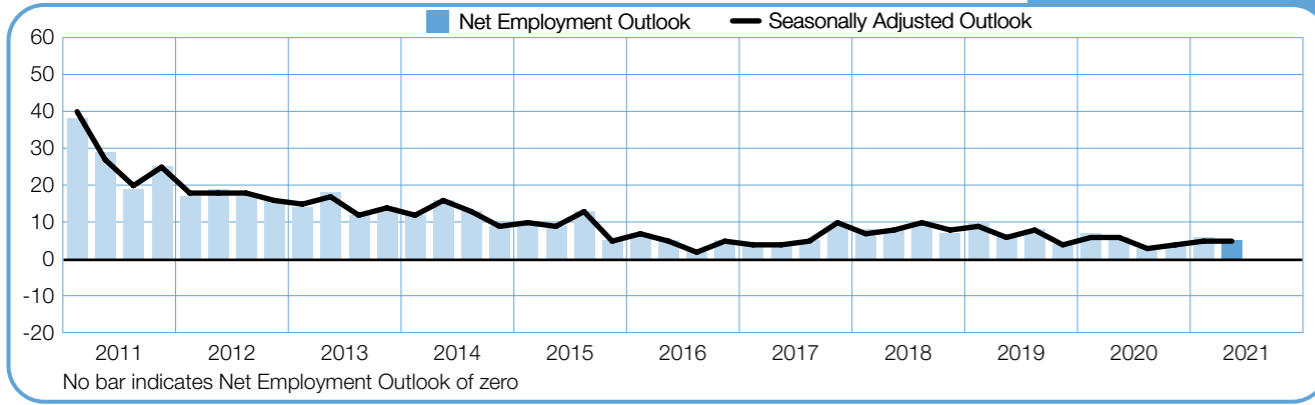
## Australia

+16 (+17)%



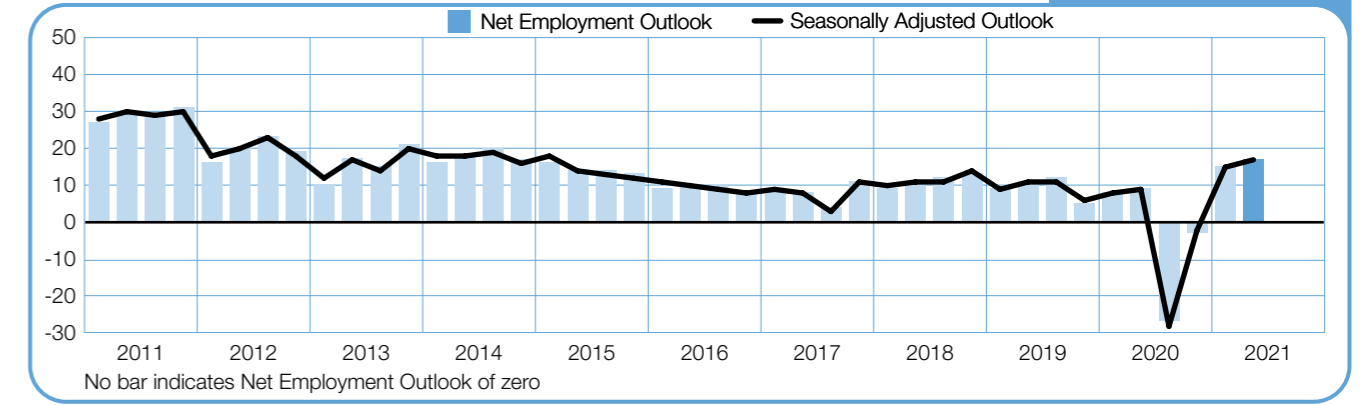
## China

+5 (+5)%



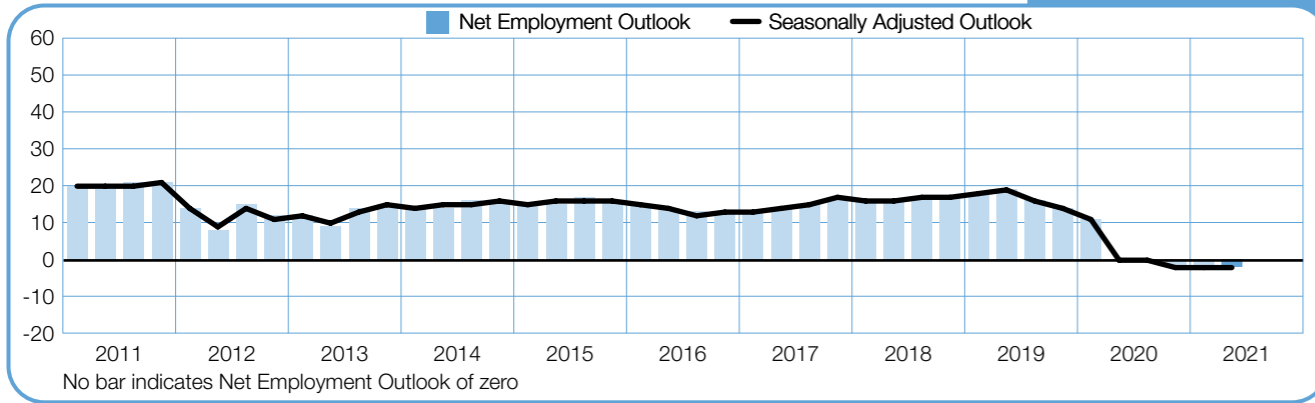
## Singapore

+17 (+17)%



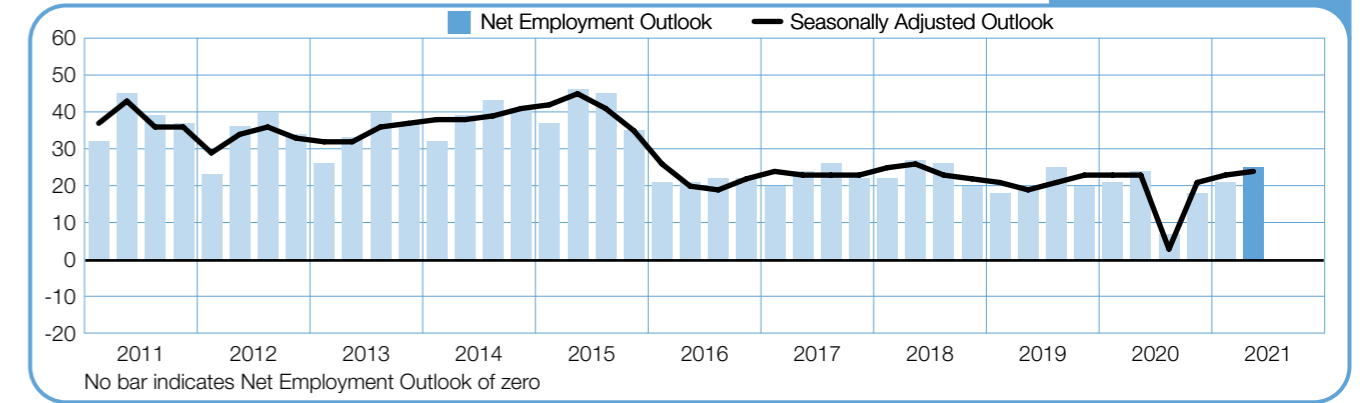
## Hong Kong

-2 (-2)%



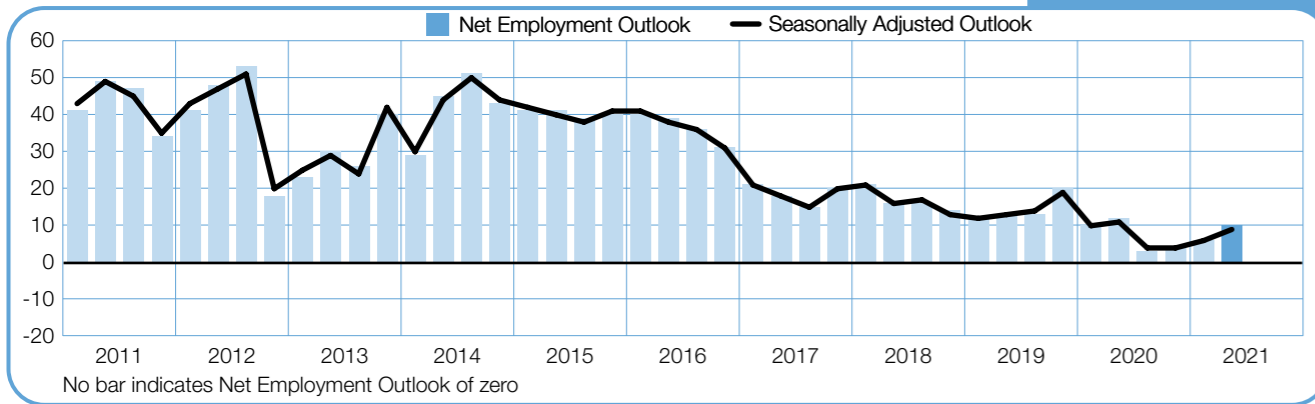
## Taiwan

+25 (+24)%



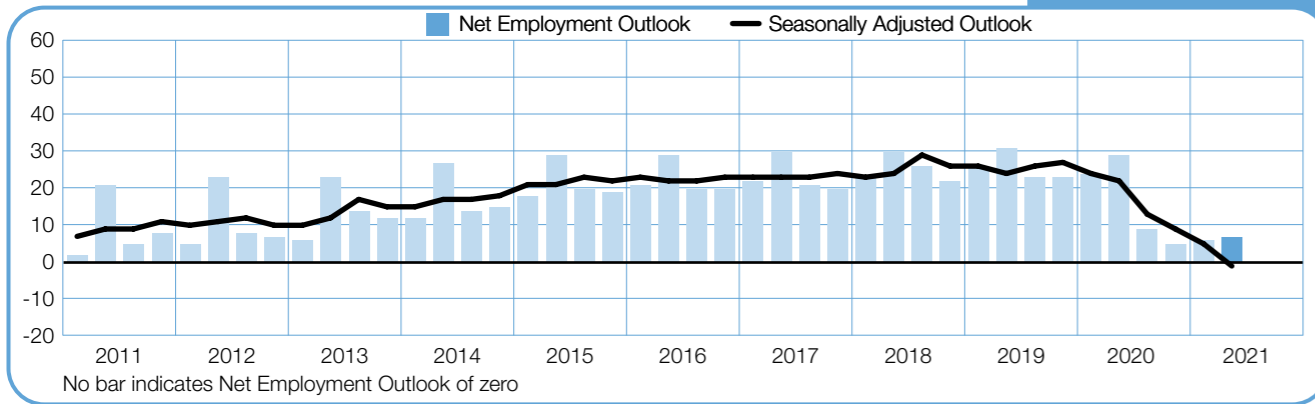
## India

+10 (+9)%



## Japan

+7 (-1)%



# International Comparisons – EMEA

ManpowerGroup surveyed more than 15,300 employers in the Europe, Middle East and Africa (EMEA) region on hiring intentions for the second quarter of 2021. Workforce gains are expected in 18 countries during the coming quarter, but employers in six countries expect to trim payrolls (with flat hiring prospects reported in two).

Mixed hiring sentiment is reported across the three largest Eurozone economies for the upcoming quarter. Employers in France expect the strongest hiring pace, anticipating moderate job gains. Hiring plans strengthen in all seven French industry sectors when compared with the previous quarter, with Construction sector employers expecting upbeat hiring activity and the Manufacturing sector Outlook at its strongest level in 13 years.

However, German employers report increasingly cautious hiring expectations for the second quarter of 2021. Outlooks weaken in all seven German industry sectors when compared with both the first quarter of 2021 and last year at this time, with Construction sector employers expecting the weakest labor market in seven years, and hiring sentiment in the Restaurants & Hotels sector at its weakest since 2003 following four consecutive gloomy forecasts. In Italy, employers expect to trim payrolls during the coming quarter as the national forecast turns negative again, with hiring prospects declining in five industry sectors both quarter-over-quarter and year-over-year, including the weakest hiring plans for the Other Production sector in seven years.

UK employers expect the labor market slump to continue in the next three months with a fourth consecutive negative forecast. Employers in six of nine UK industry sectors expect to trim payrolls including downbeat forecasts in the Finance & Business Services, Community & Social, Hotels & Retail and Manufacturing sectors.

Now in its fourth consecutive quarter, employers in Spain expect the labor market slump to continue in the April to June period. Hiring plans remain weak in the Restaurants & Hotels sector, but some improvements are evident elsewhere in the economy,

with moderately stronger forecasts for the Construction, Finance & Business Services and Wholesale & Retail Trade sectors in comparison with the prior quarter.

Employers in Belgium report an uptick in hiring prospects when compared with the first quarter of 2021, although hiring sentiment nationally remains weaker in comparison with pre-pandemic levels. Construction sector employers expect the strongest hiring pace, but the labor market slump in the Restaurants & Hotels sector continues for the fourth consecutive quarter where employers also report the weakest forecast since the survey began in 2003. In the Netherlands, hiring prospects remain relatively stable in comparison with the prior quarter, with employers anticipating some workforce gains. Construction sector employers report a sharply weaker forecast in comparison with the previous quarter, although this is partially offset by considerably stronger hiring plans for the Manufacturing and Restaurants & Hotels sectors.

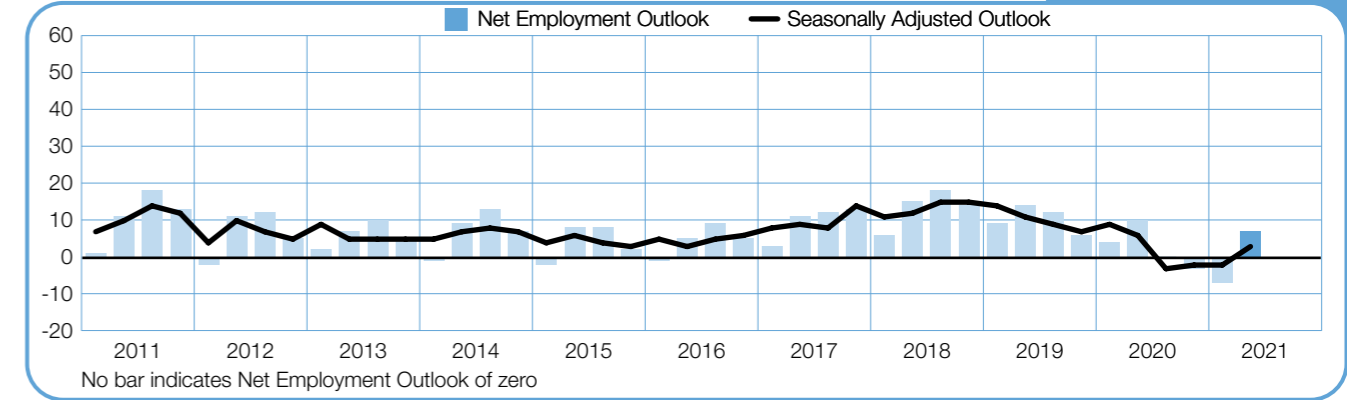
In Poland, employer confidence remains at a similar level to the prior quarter, fueled in part by respectable hiring plans in the Construction and Manufacturing sectors. Swedish employers report encouraging signs for job seekers, following three consecutive quarters of improvement, anticipating job gains in six of seven industry sectors during the coming quarter. Finance & Business Services sector employers forecast a healthy hiring pace, while the Outlook for the Manufacturing sector strengthens considerably in comparison with the prior quarter.

Norwegian employers anticipate slow-paced workforce gains during the next three months as the gradual recovery from the sharp Quarter 3 2020 contraction continues, driven in part by stronger hiring plans in the Finance & Business Services and Manufacturing sectors when compared with the previous quarter.

The strongest hiring prospects across the EMEA region as a whole are reported in Croatia and Romania. In Croatia, workforce gains are anticipated in all seven industry sectors during Quarter 2 2021 while the Romanian Outlook has improved for three consecutive quarters now.

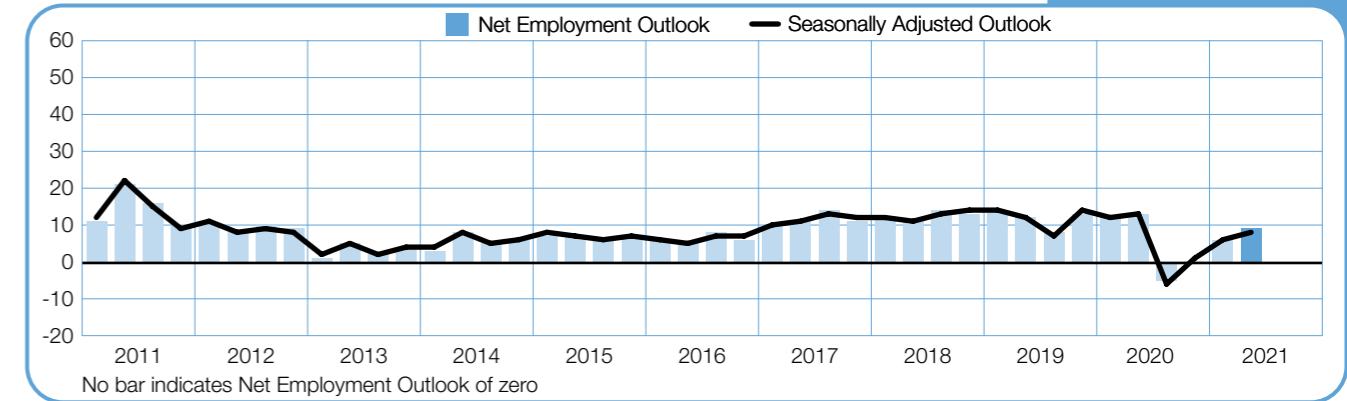
## Austria

+7 (+3)%



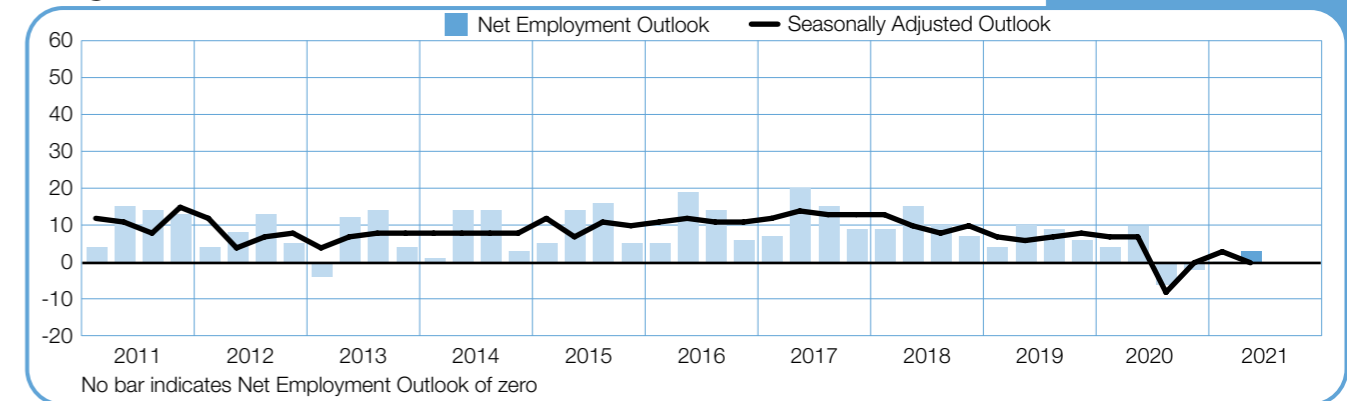
## Belgium

+9 (+8)%



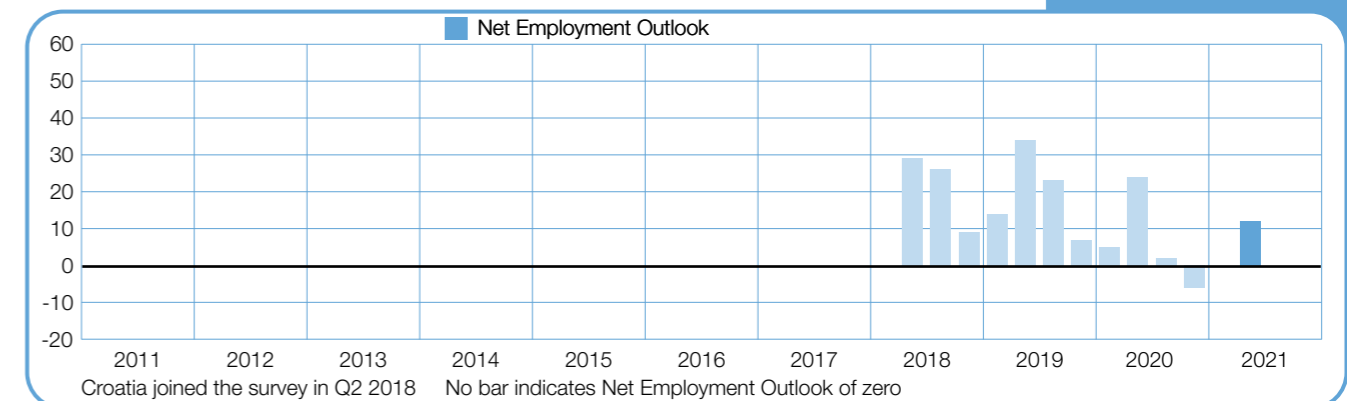
## Bulgaria

+3 (0)%



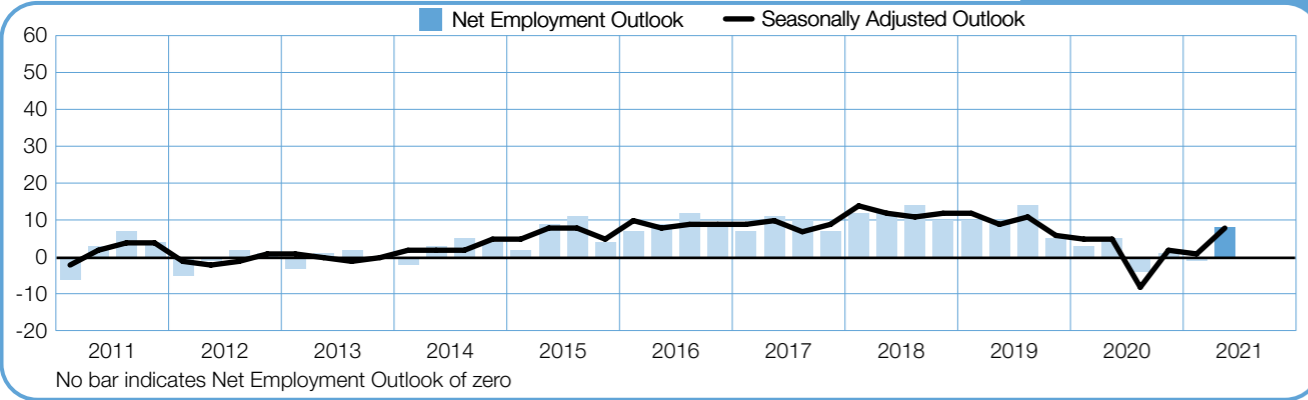
## Croatia

+12%



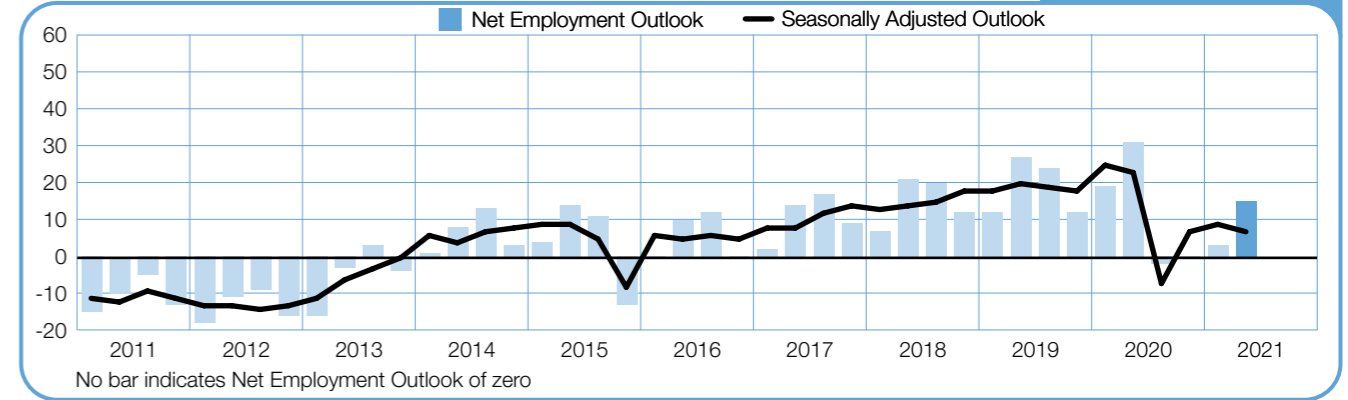
## Czech Republic

+8 (+8)%



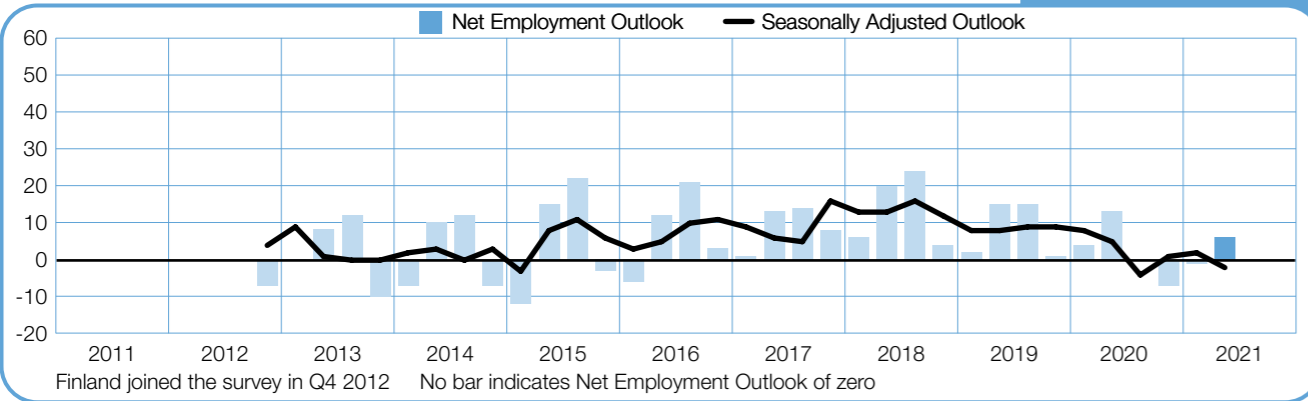
## Greece

+15 (+7)%



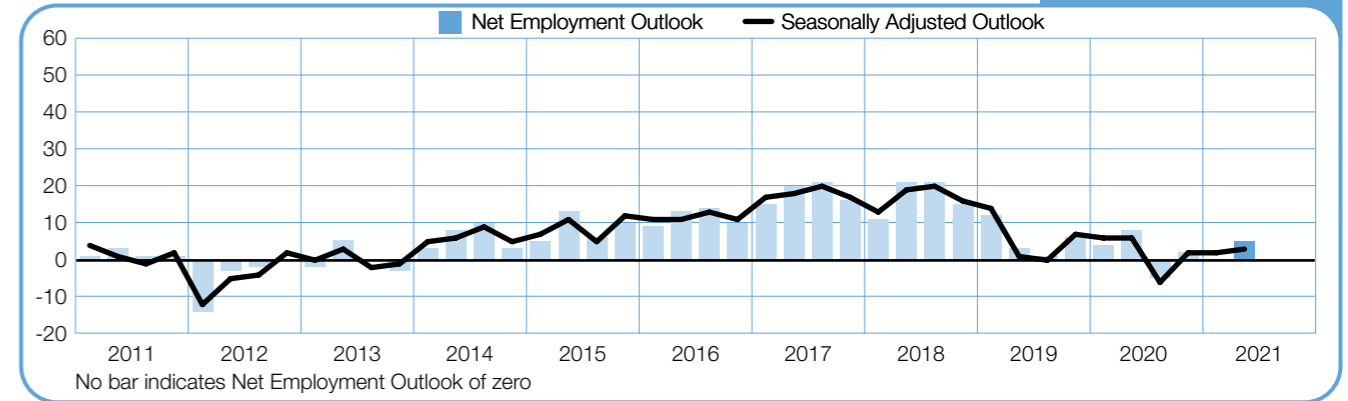
## Finland

+6 (-2)%



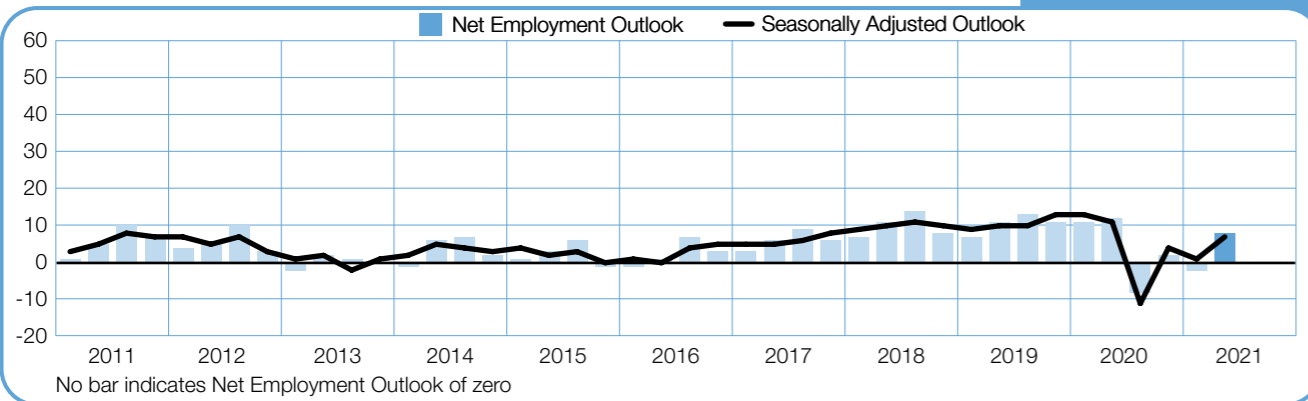
## Hungary

+5 (+3)%



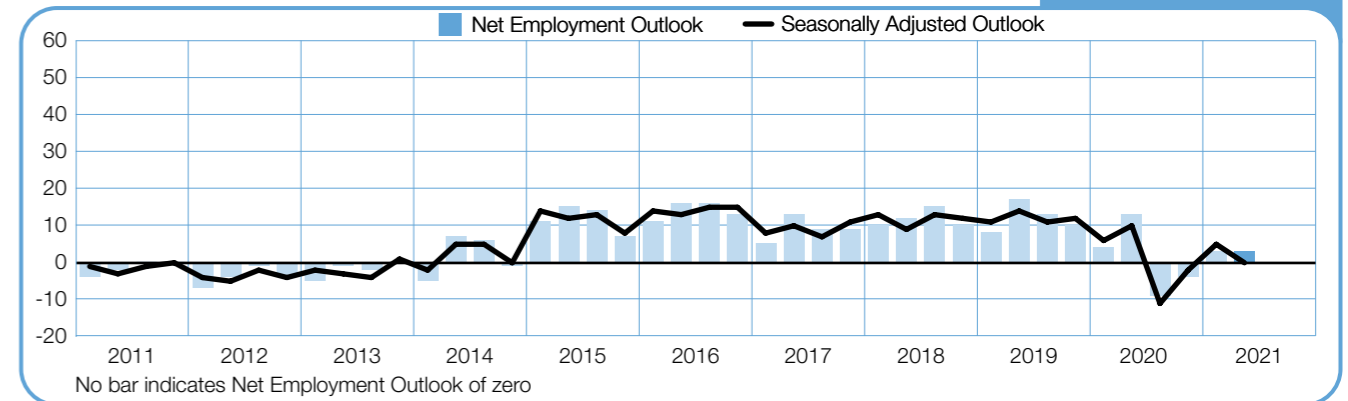
## France

+8 (+7)%



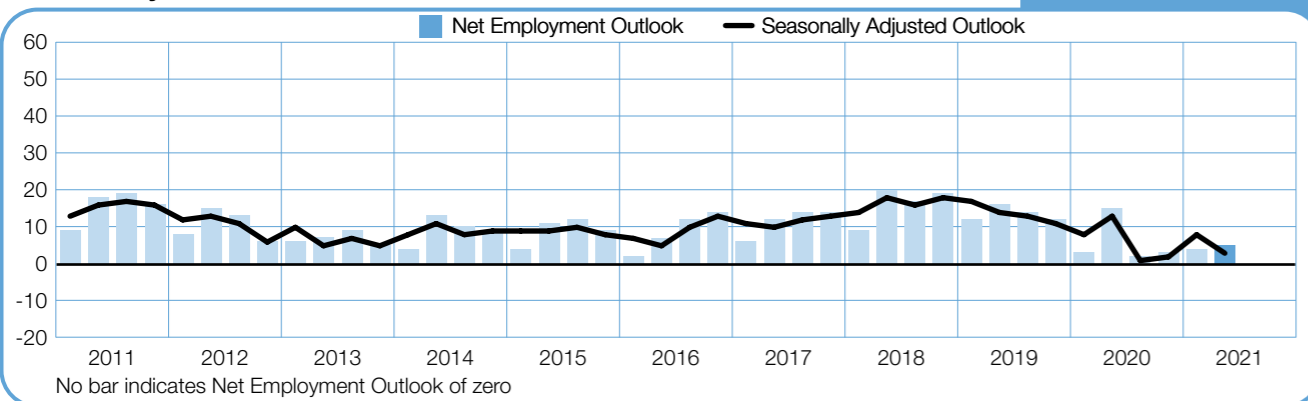
## Ireland

+3 (0)%



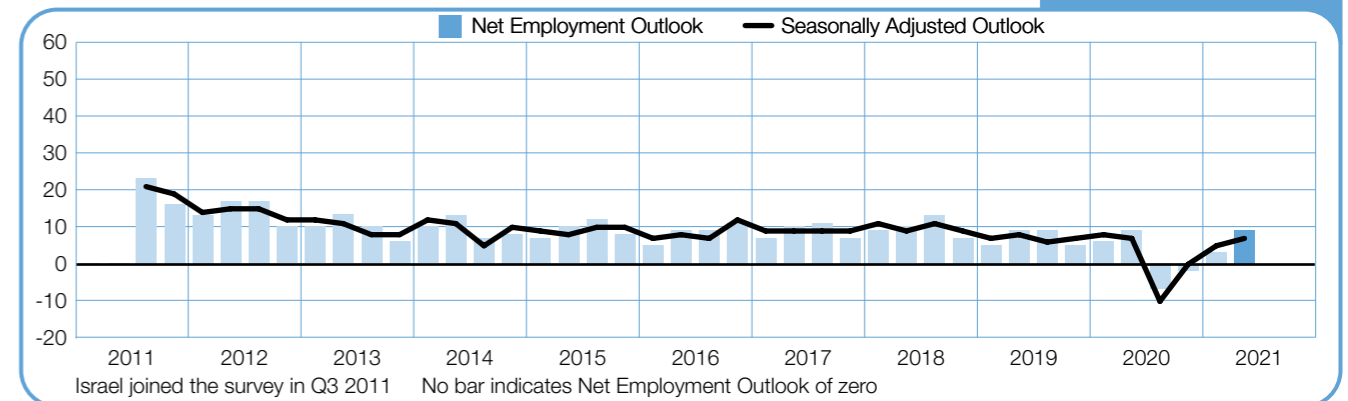
## Germany

+5 (+3)%



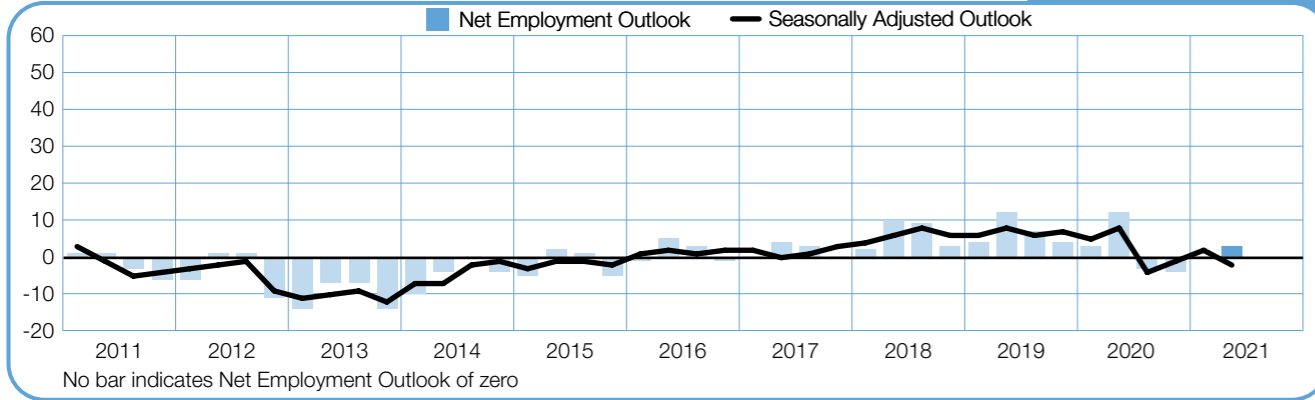
## Israel

+9 (+7)%



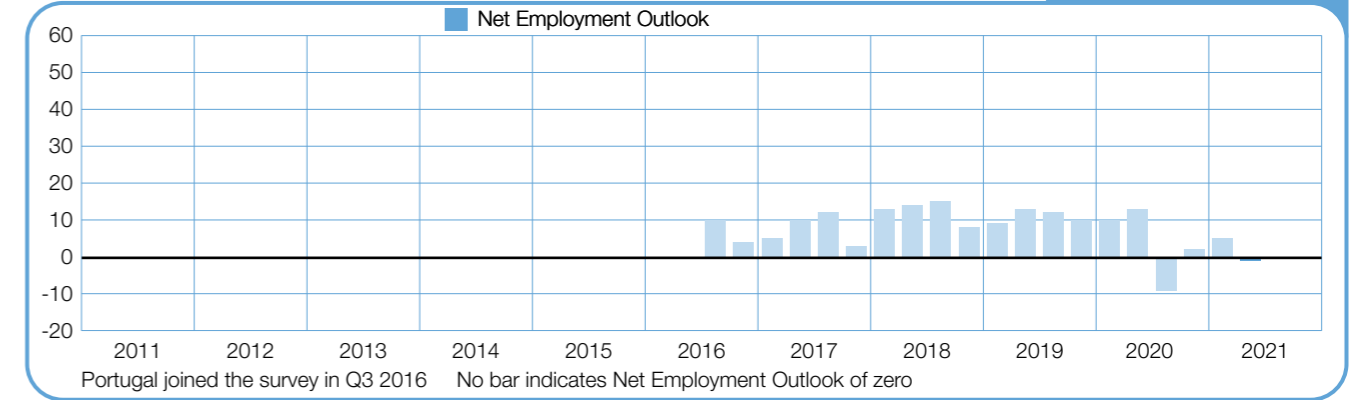
### Italy

**+3 (-2)%**



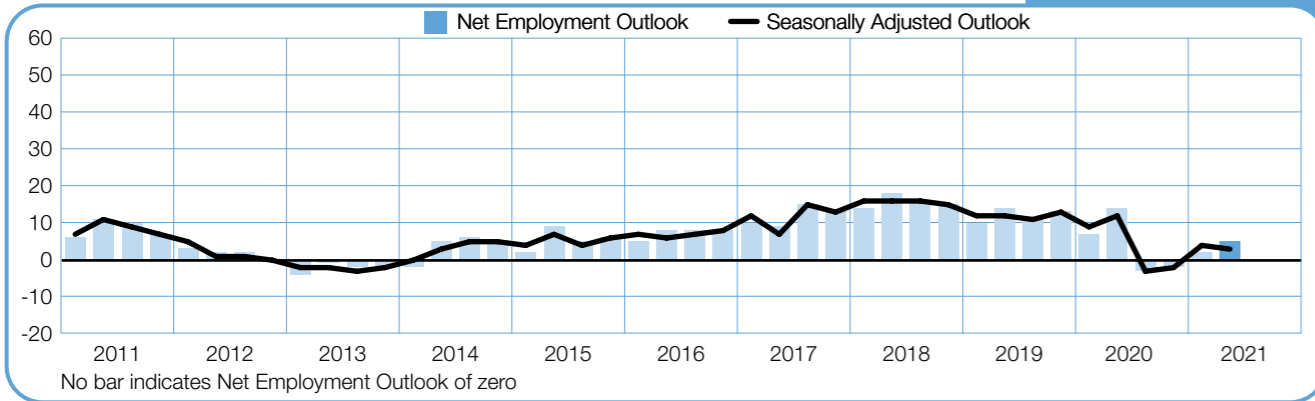
### Portugal

**-1%**



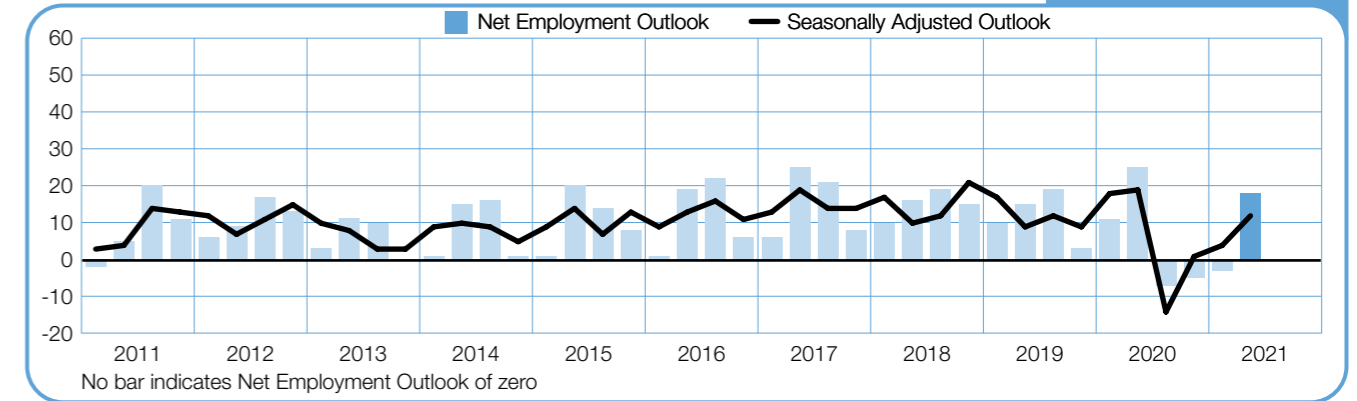
### Netherlands

**+5 (+3)%**



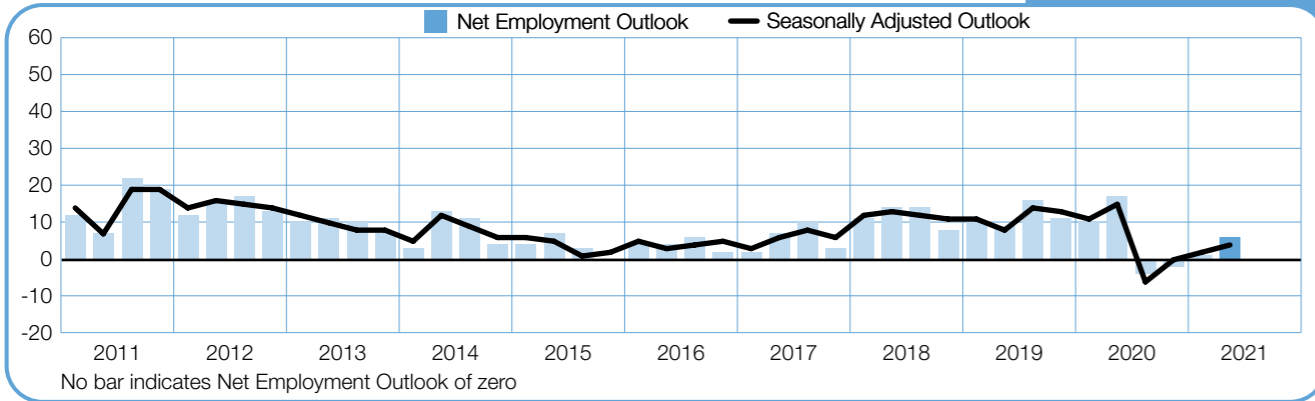
### Romania

**+18 (+12)%**



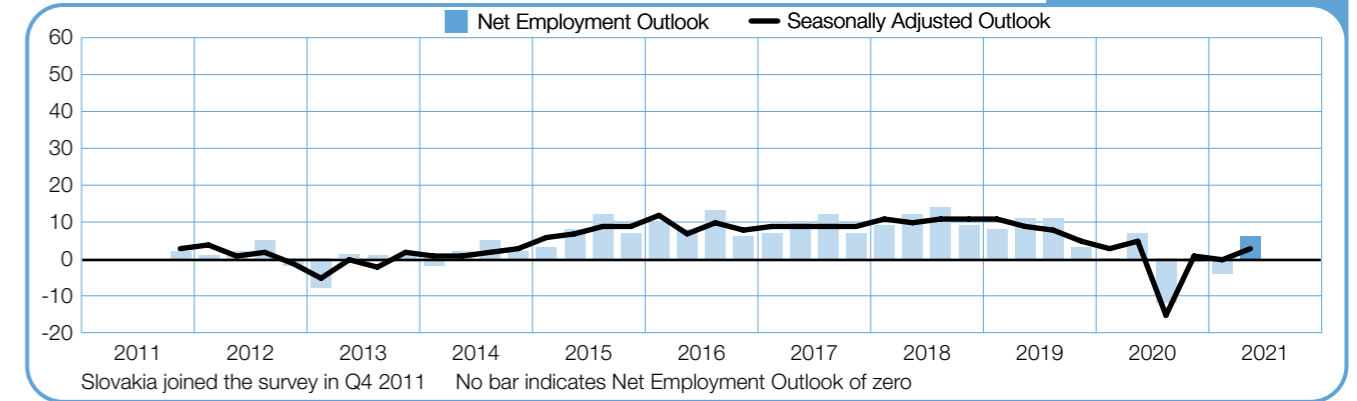
### Norway

**+6 (+4)%**



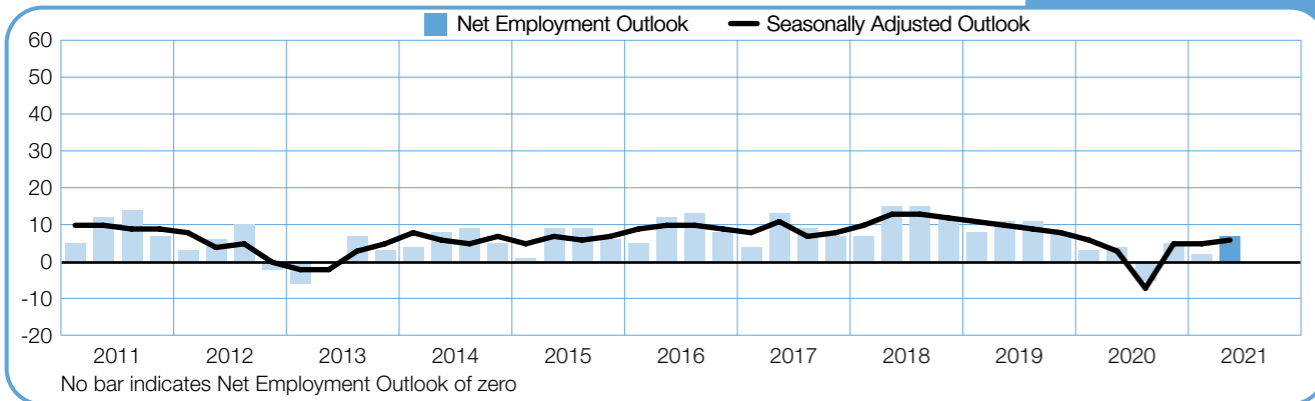
### Slovakia

**+6 (+3)%**



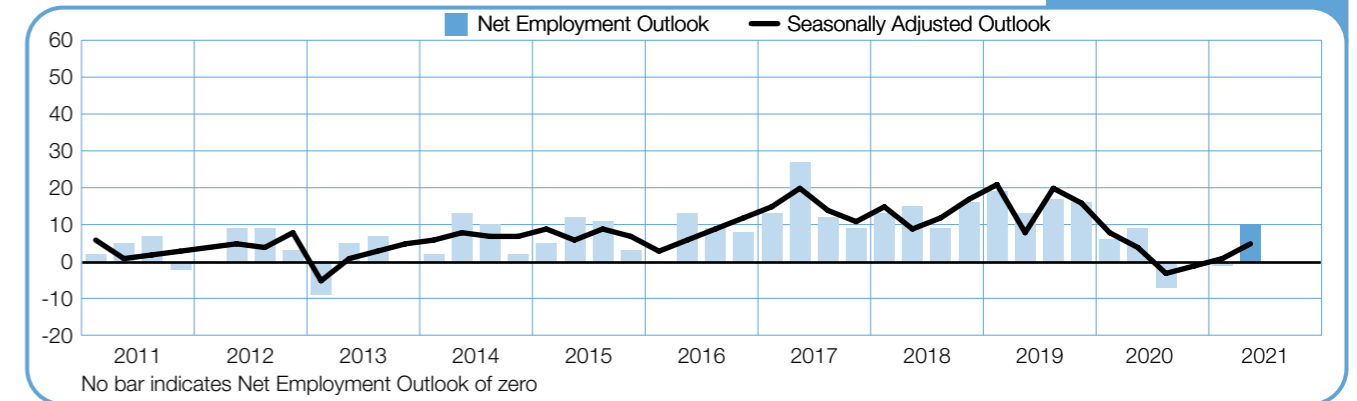
### Poland

**+7 (+6)%**



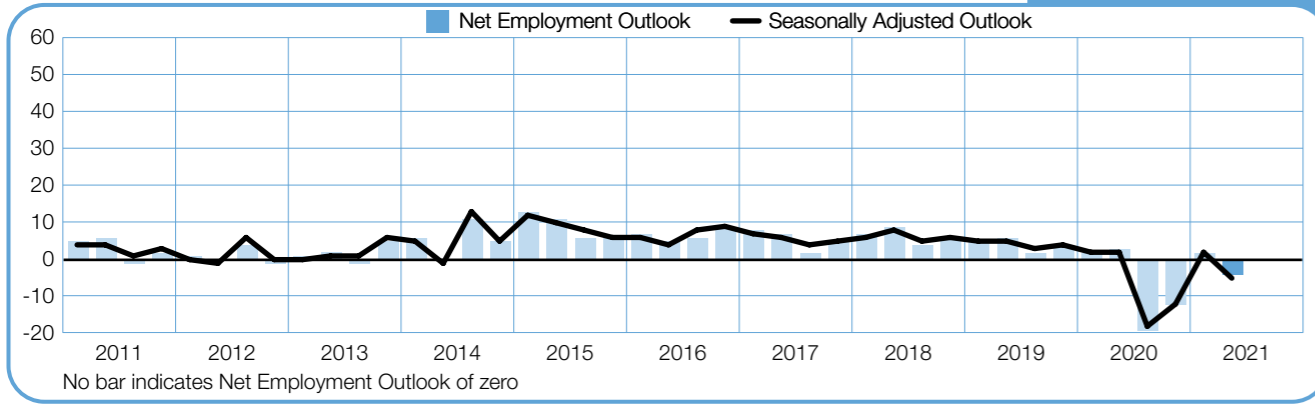
### Slovenia

**+10 (+5)%**



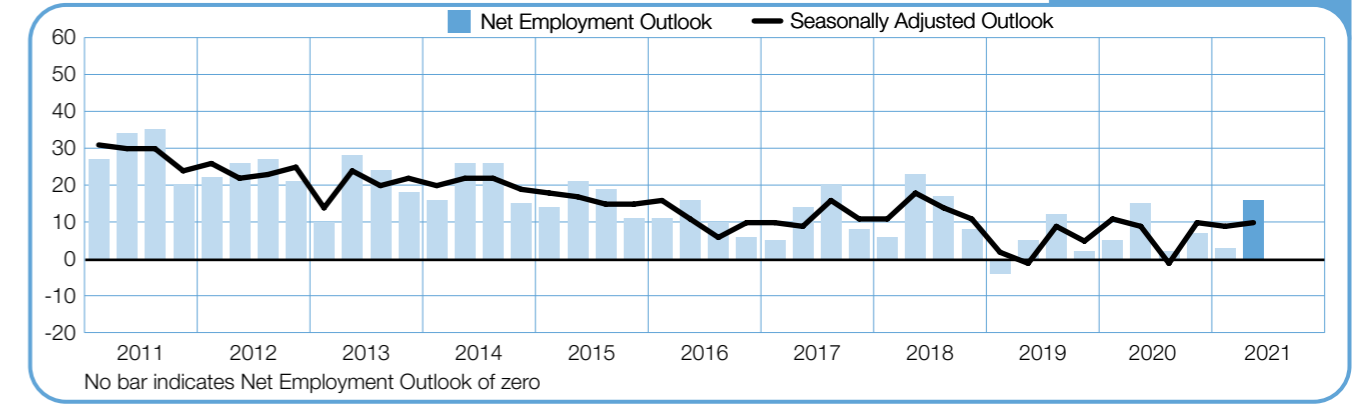
## South Africa

-4 (-5)%



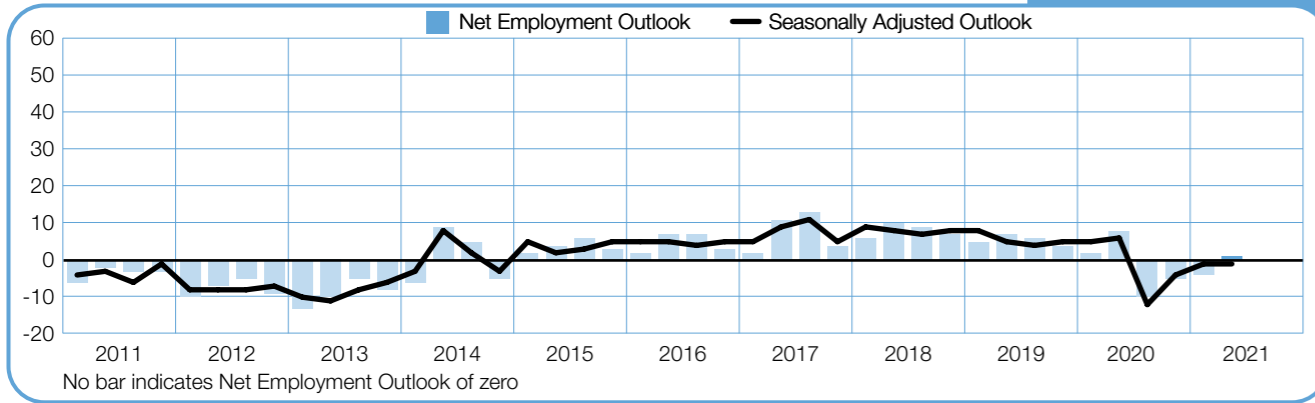
## Turkey

+16 (+10)%



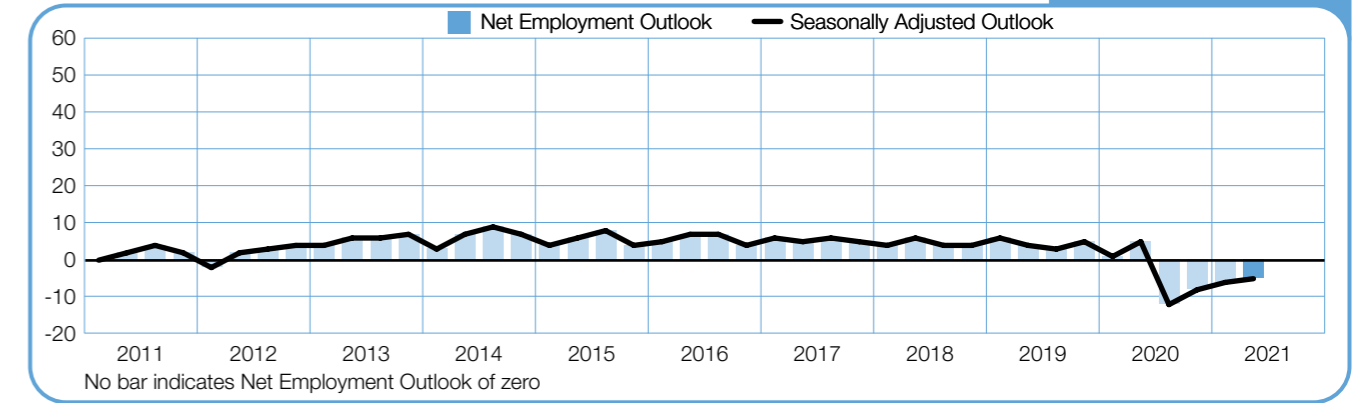
## Spain

+1 (-1)%



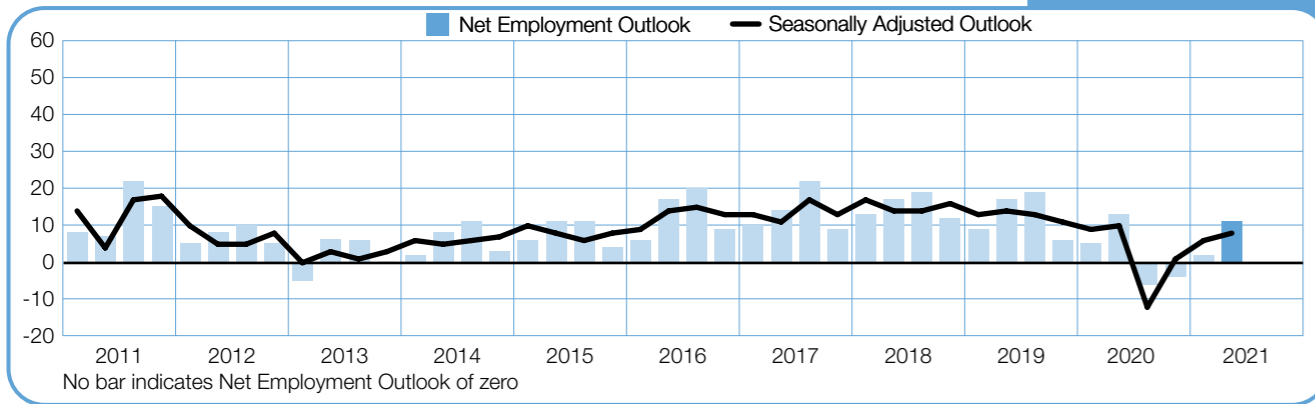
## United Kingdom

-5 (-5)%



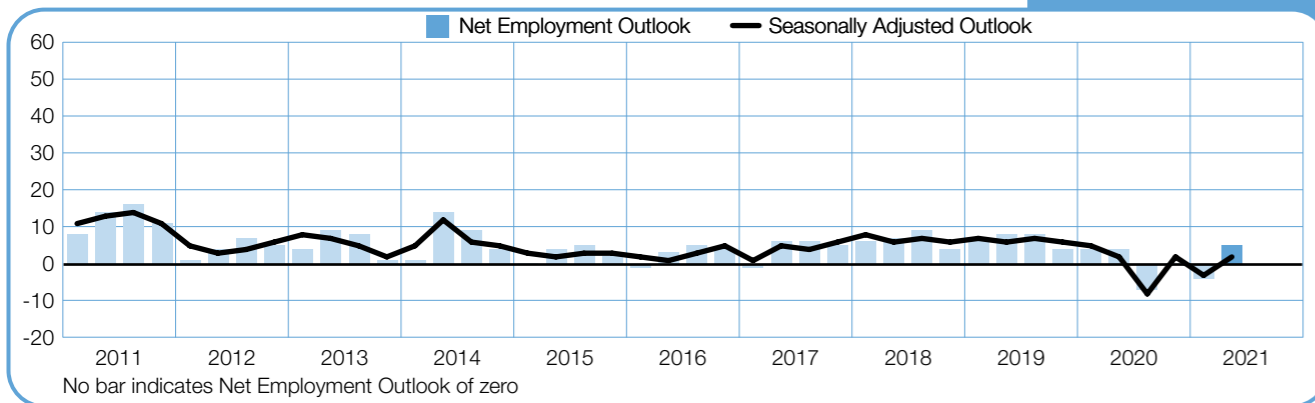
## Sweden

+11 (+8)%



## Switzerland

+5 (+2)%



# 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%.

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®

## 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, Talent Solutions and Jefferson Wells – creates substantial value for candidates and clients across more than 75 countries and territories and has done so for over 70 years. We are recognized consistently for our diversity - as a best place to work for Women, Inclusion, Equality and Disability. In 2021, ManpowerGroup was named one of the World's Most Ethical Companies for

the twelfth consecutive year. We also earned globally and in Belgium a Gold CSR & sustainability rating on EcoVadis's environmental, social and ethical supplier performance assessment. ManpowerGroup Belgium received the Diversity Label from the Brussels-Capital Region and was named 'Best Staffing, Sourcing & Contingent Workforce Company at the HR Excellence Awards 2020. All these recognitions confirm our position as the brand of choice for in-demand talent.

See how ManpowerGroup® is powering the future of work: [www.manpowergroup.com](http://www.manpowergroup.com)

Ready for the new era The Human Age, where talent is the engine of the economy? Visit our ManpowerGroup Knowledge Center: [www.manpowergroup.be](http://www.manpowergroup.be)

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