



ManpowerGroup®

# Q1 2022 ManpowerGroup Employment Outlook Survey

**The Great Hiring Bounceback Continues:**  
Employers Globally Report Optimistic  
Employment Outlooks for Q1 2022



A woman with dark, wavy hair, wearing a grey blazer, is sitting at a desk in an office. She is holding a pen and writing in a notebook. A laptop is open to her right. The background is blurred, showing office furniture and windows.

## Executive Summary



# Executive Summary

In the 60th anniversary edition of the ManpowerGroup Employment Outlook Survey of more than 39,000 employers, all countries and territories report a positive outlook for the first time since before the pandemic.

**While outlooks improve year-over-year, hiring sentiment weakens compared with Q4 2021** in Taiwan, the U.S., Japan and France.

**Digital roles most in demand:** IT, Technology, Telecoms, Communications and Media reported the strongest outlook (+50%), followed by Banking, Finance, Insurance and Real Estate (+43%) and Restaurants and Hotels (+40%). The weakest hiring intentions were found in Non-for-profit (+26%) and Primary Production (+29%).

**Employers know flexibility is the key to attracting workers in a tight labor market:** Organizations expect 51% (of finance) and 29% (of manufacturing and production) workforce to work a hybrid mix of onsite workplace and remote. This is a substantial change since Q2 2021, when only 22% of organizations predicted a shift to a hybrid model.

**Not all roles will be hybrid:** The Manufacturing and Production industries are most likely to be in the workplace all of the time (55%) whereas roles in IT and telecoms are more likely to be full-time remote (17%).



A smiling woman with blonde hair tied back, wearing black-rimmed glasses and a red floral patterned top with a white lace collar. She is sitting at a wooden desk, using a laptop. A red mug and some papers are on the desk. The background is a bright, out-of-focus indoor space.

# Table of Contents

# Table of Contents

[Q1 Employment Outlook](#)

[Vaccine Expectations For On-site Return](#)

[The Great Shift To Hybrid Working](#)

[About The Manpowergroup Employment Outlook Survey](#)





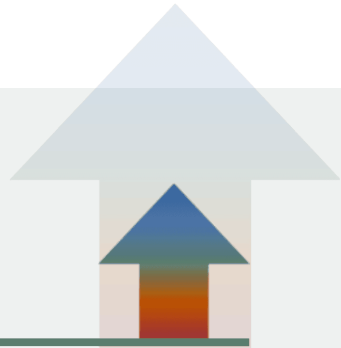
# Q1 Employment Outlook

For the first time since before the pandemic, all 40 countries report positive employment outlooks



# Employment Outlooks:

For the first time since before the pandemic, all 40 countries report positive employment outlooks



“

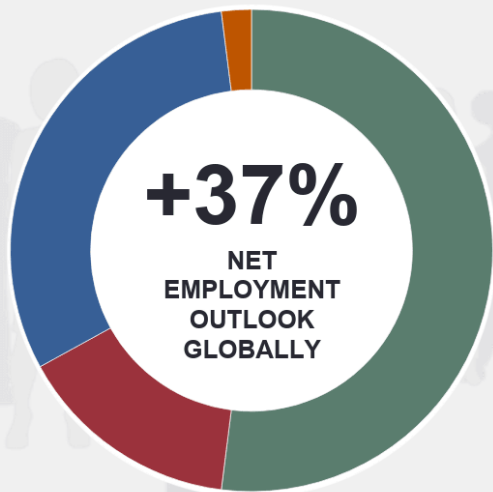
This recovery is unlike any we have seen before with hiring intent picking up much faster than after the previous economic downturn.

**Jonas Prising** | ManpowerGroup Chairman & CEO



# Employer Hiring Expectations for January – March 2022

In the 60th anniversary edition of the ManpowerGroup Employment Outlook Survey of more than 39,000 employers, 36 of the 40 countries report higher intentions than the previous quarter. Employers globally expect a robust labor market in the first quarter of 2022, reporting a seasonally adjusted, **Net Employment Outlook of +37%**. Hiring intentions strengthen both year-over-year and quarter-over-quarter, +31% and +13%, respectively.



**52%**  
plan to hire

**2%**  
undecided

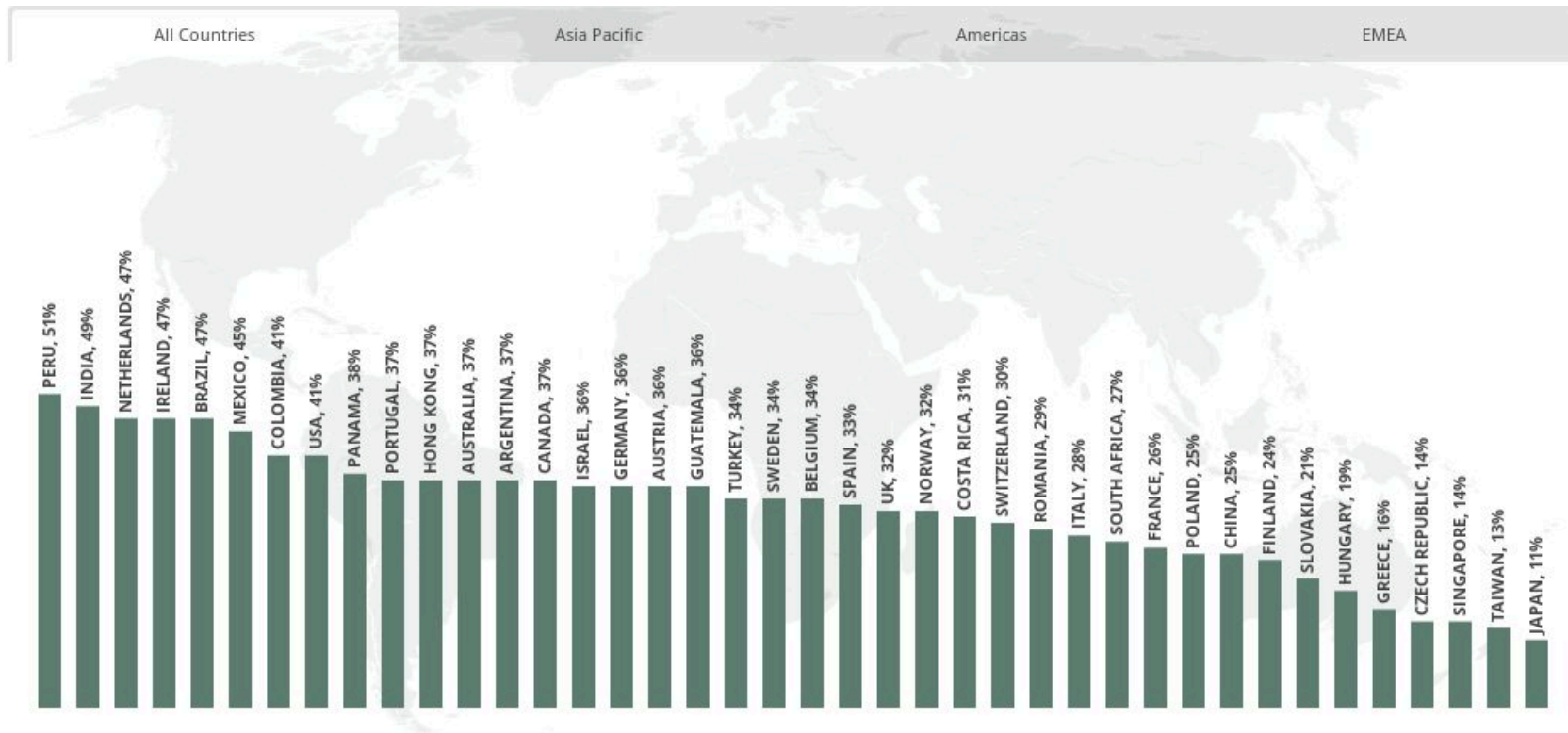
**15%**  
expect to lay off  
workers

**31%**  
plan to keep workforce  
levels steady



# All Countries Report a Positive Outlook for the First Time Since Before the Pandemic

With strong outlooks across the regions, employers in South and Central Americas reported the most positive outlook (+39%), followed by APAC (+34%), North America (+41%) and EMEA (+28%). [Click to explore the data](#)



# Employers Share Strong Optimism Across All 40 Countries Surveyed

With strong outlooks across the regions, employers in North (+41%), Central and South Americas reported the most positive outlook (+39%), followed by APAC (+34%) and EMEA (+28%).

## Countries With the Strongest & Weakest Hiring Prospects for Q1 2022:

+51%



PERU

+49%



INDIA

+47%



NETHERLANDS

+11%



JAPAN

+13%



TAIWAN

+14%



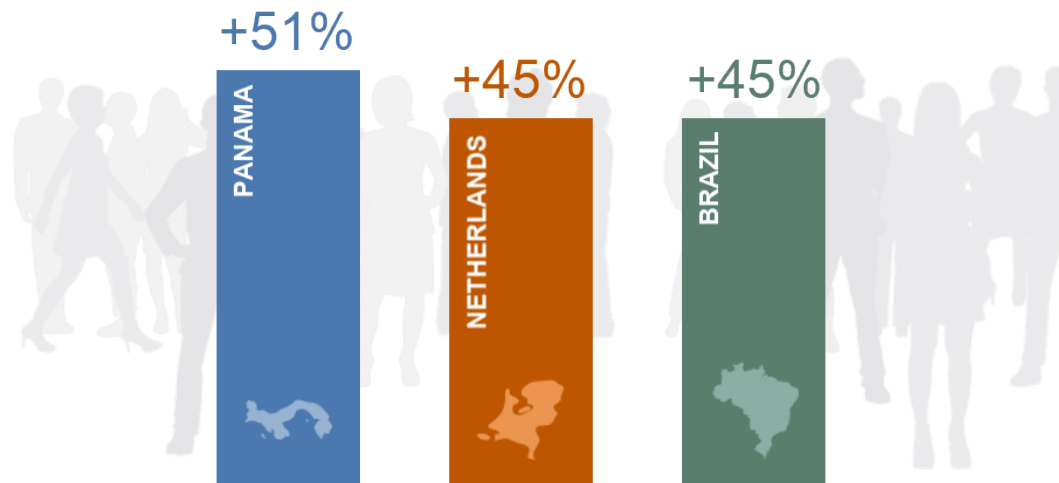
SINGAPORE

Strongest

Weakest

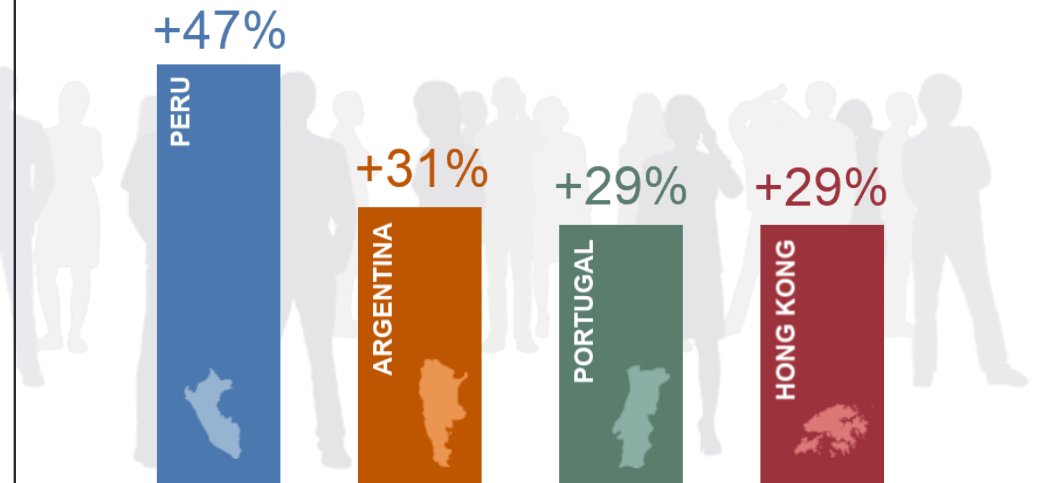
# Net Positive Outlooks Optimistic Across Regions, Both YoY & QoQ

The strongest year-over-year improvements are reported in Panama (+51%), Netherlands (+45%) and Brazil (+45%).



Year-over-Year

The strongest quarter-over-quarter improvements are reported in Peru (+47%), Argentina (+31%), the Portugal (+29%) and Hong Kong (+29%).

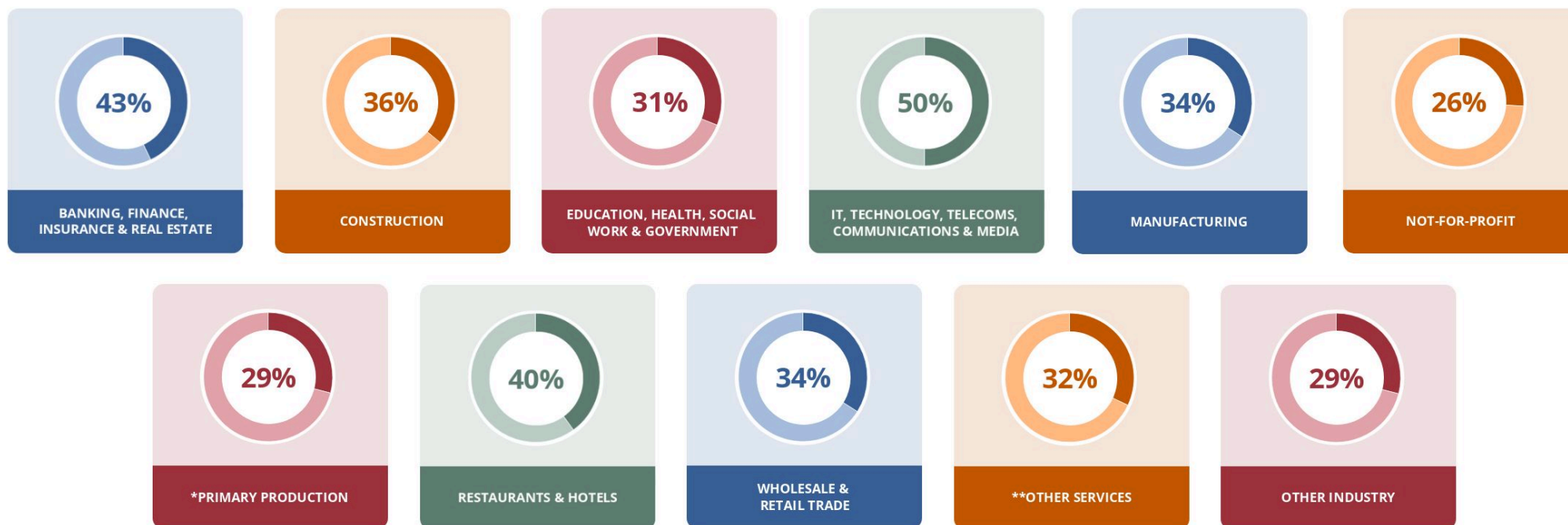


Quarter-over-Quarter



# Worldwide Growth Expected Across All 11 Industries

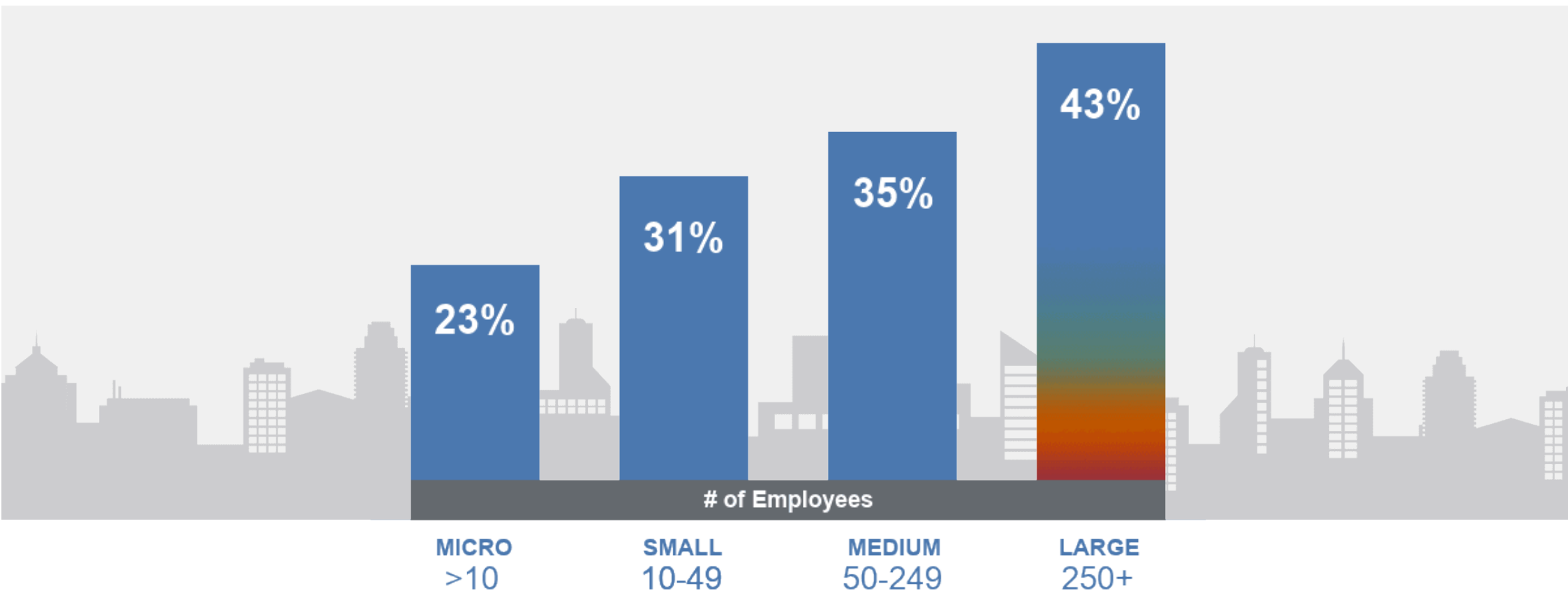
**Digital roles are most in-demand globally:** IT, Technology, Telecoms, Communications and Media reported the strongest outlook (+50%), followed by Banking, Finance, Insurance and Real Estate (+43%) and Restaurants and Hotels (+40%).



\*Includes: Agriculture, Forestry and Fishing; Mining and Quarrying; Electricity; Gas and Air Conditioning Supply; Water Supply; Sewerage, Waste Management and Remediation Activities.

\*\*Includes: Professional, Scientific and Technical Activities; Administrative and Support Services; Other Service Activities.

# Large Organizations Report Strongest Hiring Intentions



# Hiring intentions in EMEA Improve in All Countries YoY For Second Consecutive Quarter

Compared with Q4, 2020 hiring intentions improve in **22 countries** and decline in one (France, -1%).

Employers in the UK report outlooks of 32%, up 2% since last quarter with strongest expectations in London and most optimistic outlooks in IT, Technology, Telecoms, Communications & Media.

Organizations in France report an outlook of 26%, down 1% QoQ, with most optimistic hiring intentions in Banking, Finance, Insurance and Real Estate.

## STRONGEST HIRING INTENTIONS:

Netherlands (+47%), Ireland (+47%) and Portugal (+37%)



## WEAKEST HIRING INTENTIONS:

Czech Republic (+14%), Greece (+16%) and Hungary (+19%)



# Central & South American Employers Especially Optimistic

Hiring intentions improve in 9 countries when compared to both Q4 2020 and this time last year, weakening in one (U.S., -5%).

Peruvian employers report the most positive hiring intentions amongst the 40 countries.

Growth is expected in all 11 industry sectors, 7 regions and company sizes with the strongest intentions in more than 13 years.

## STRONGEST HIRING INTENTIONS:

Peru (+51%), Brazil, (+47%) and Mexico (+45)



## WEAKEST HIRING INTENTIONS:

Costa Rica (31%), Guatemala (+36%) and Canada (+37%)

# Majority of Asia Pacific Employers More Optimistic to Hire

Hiring sentiment strengthens in 5 countries and territories QoQ while weakening in two; Singapore and Taiwan.

In India employers report record-high hiring intentions, improving +5 percentage points compared to Q4, and +43% on the previous year.

The region improves +13% since last quarter, and +27 when asked this the same time last year.

## STRONGEST HIRING INTENTIONS:

India (+49%), Hong Kong, (+37%) and Australia (+37%)



## WEAKEST HIRING INTENTIONS:

Japan (+11%), Taiwan (+13%), and Singapore (+14%)

# Vaccine Expectations for On-site Return

**Nearly two-thirds of employers** are mandating vaccines in some way for their employees to return to the workplace





# Vaccine Expectations:

Nearly two-thirds of employers are mandating vaccines in some way for their employees to return to the workplace

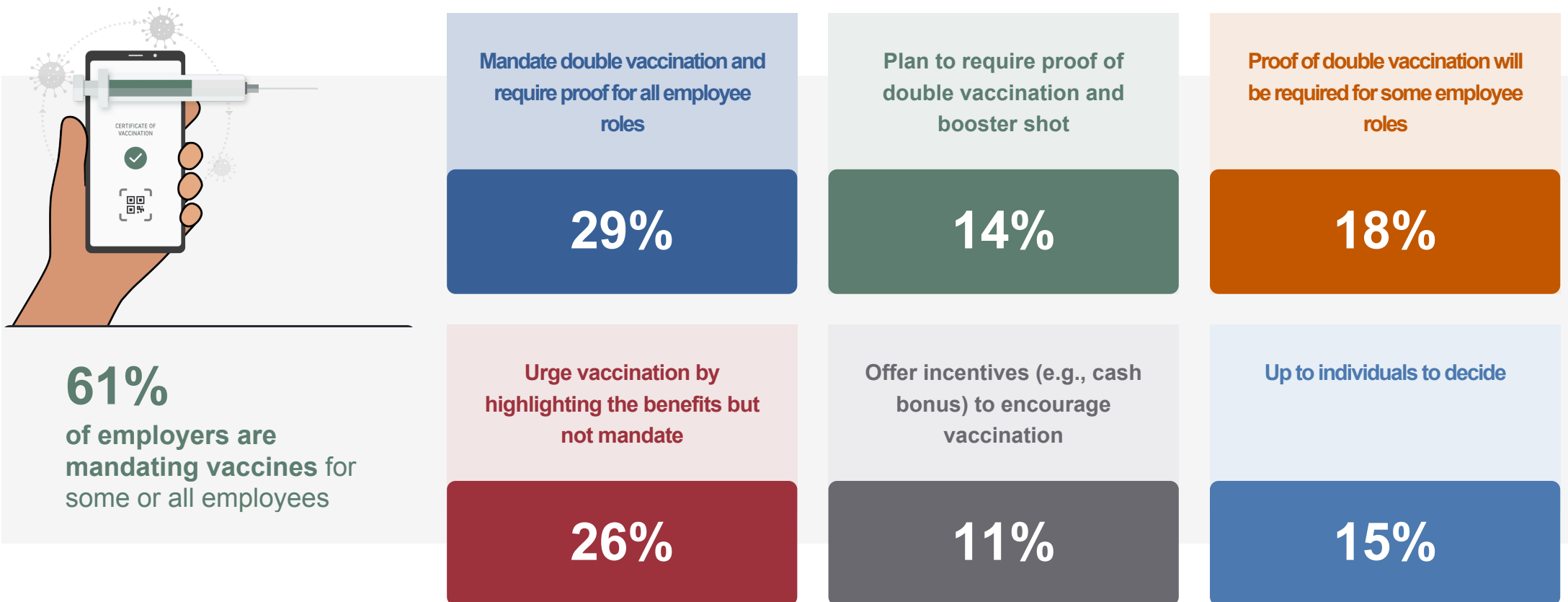
---

**Only 15%** are letting individuals decide



# Vaccine Expectations for On-Site Return

Employers globally share their requirements for employees before they can return to the workplace:



\*Respondents could choose more than one option, meaning results add up to more than 100%.

# Primary Production & Construction Most Likely to Mandate Vaccines

■ Mandating Vaccinations ■ No Plans ■ None of These

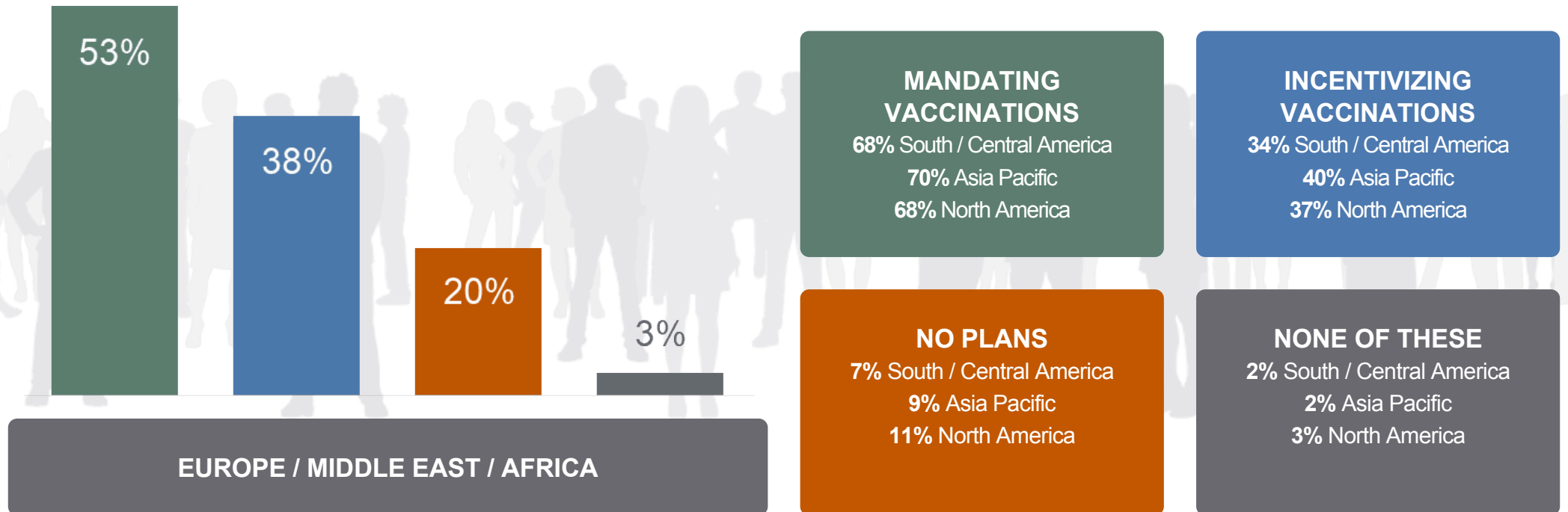


\*Includes: Agriculture, Forestry, and Fishing; Mining and Quarrying; Electricity, Gas and Air Conditioning Supply; Water Supply; Sewerage, Waste Management and Remediation Activities

\*\*Includes: Professional, Scientific and Technical Activities; Administrative and Support Services; Other Service Activities



# Employers In EMEA Are Less Likely To Mandate Vaccinations & More Likely To Have No Plans

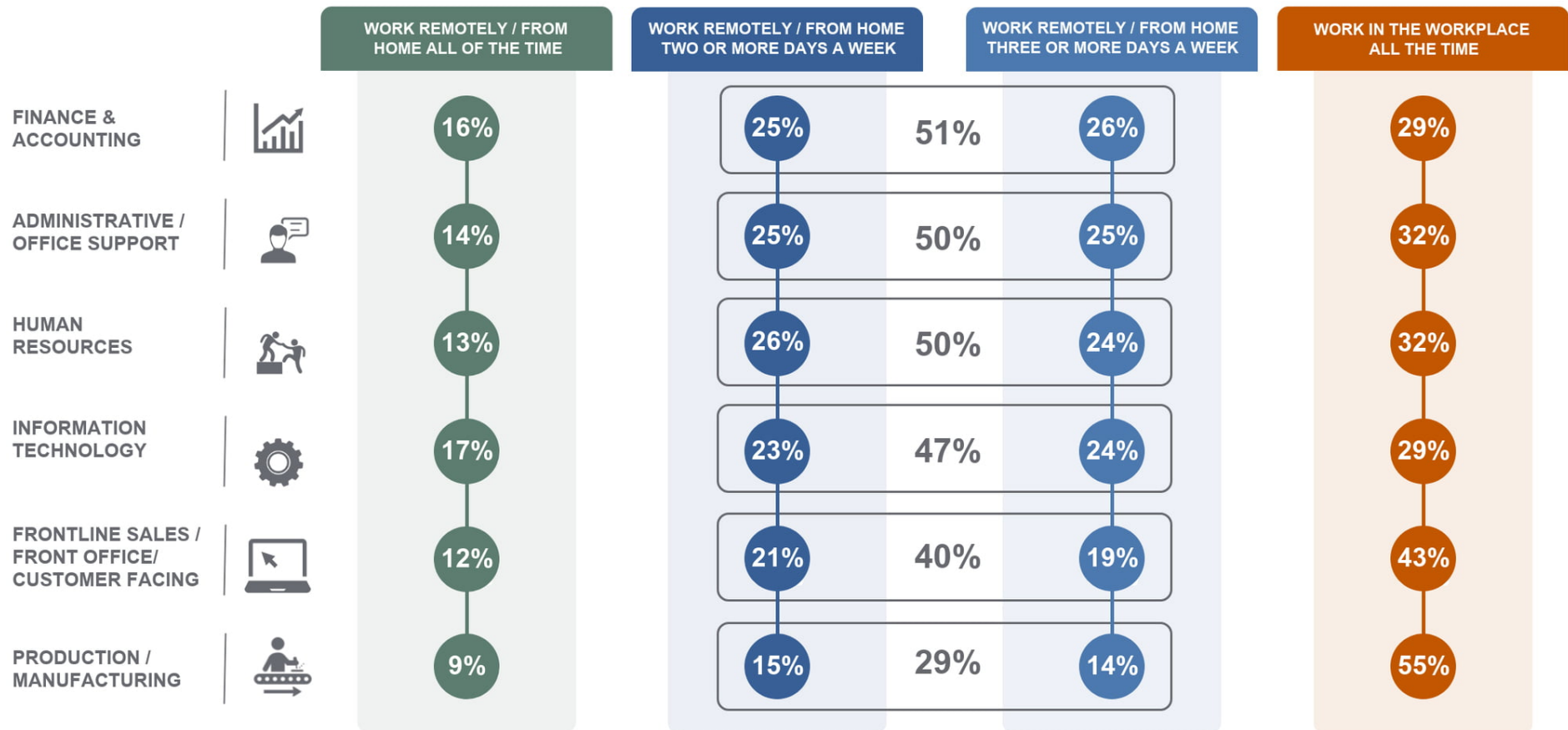


# The Great Shift to Hybrid Working

More employers are embracing the blend of work and home



# Even in Frontline, Customer Service & Manufacturing, Employers are Recognizing the Need for Hybrid Work



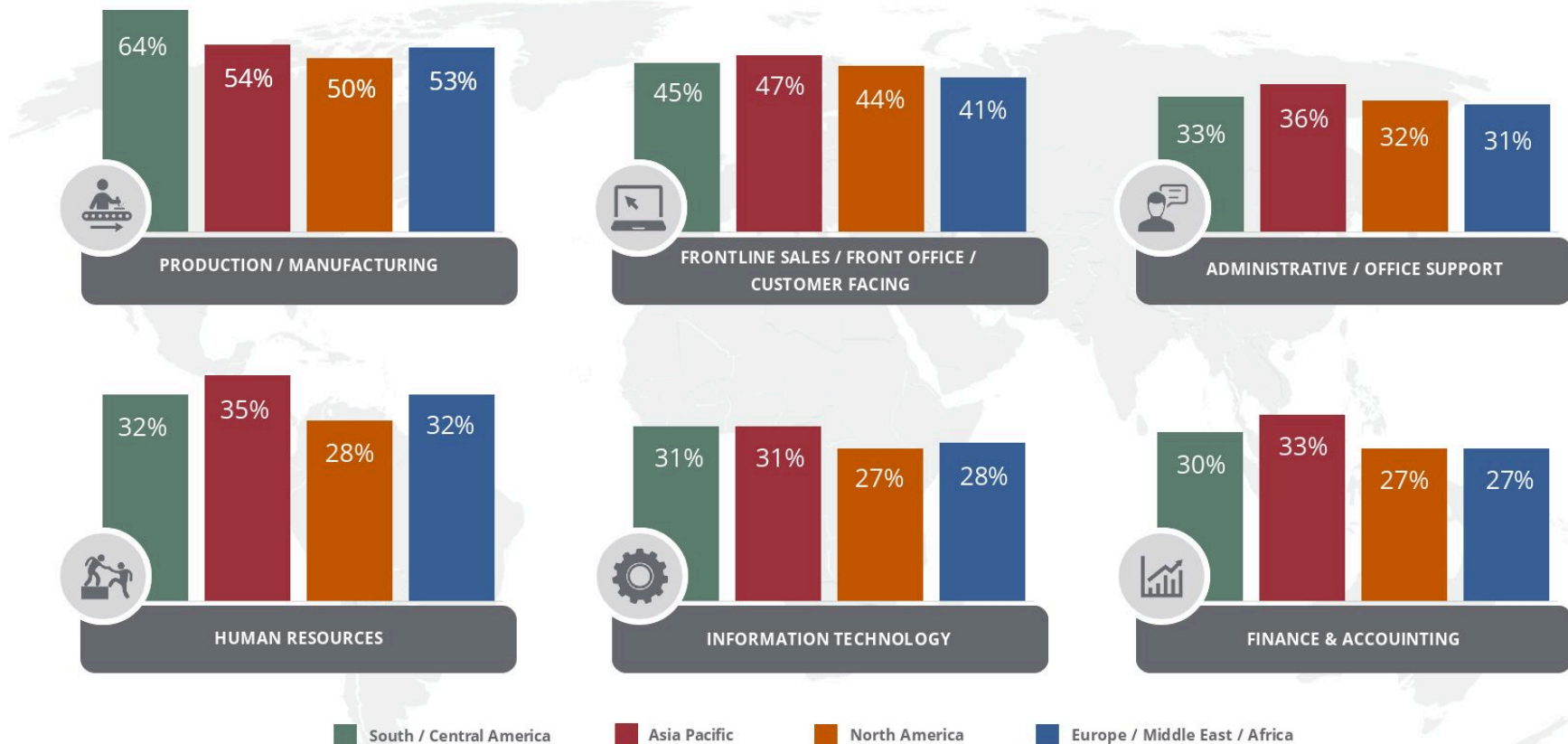
## HYBRID MODEL

Working a mix of some days remote and some days in the workplace

\*Respondents answering Don't know brings the total up to 100% for all roles

# Production & Manufacturing Roles In Central & South America Are Most Likely To Be In The Workplace Full-time

Work in the **workplace** all the time by Global Region





A photograph of a modern, multi-story brick and glass building, identified by the "ManpowerGroup" signage on its facade. The building is situated on a waterfront, with a wooden pier and stairs leading down to the water. The sky is blue with light clouds. A semi-transparent white box is overlaid on the center of the image, containing the title text.

# About The ManpowerGroup Employment Outlook Survey

# ManpowerGroup Employment Outlook Survey

The ManpowerGroup Employment Outlook Survey – conducted in October 2021 – 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:

[More About the 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 nearly 39,000 public and private employers across 40 countries and territories to measure anticipated employment trends each quarter. This sample allows for analysis to be performed across specific sectors and regions to provide more detailed information.

### Focused

For more than five decades the survey has derived all of its information from a single question: "How do you anticipate total employment at your location to change in the three months to the end of March 2022 as compared to the current quarter?"

## Survey Methodology

The methodology used to collect the data for the Employment Outlook has been digitized in 40 markets for the Q1 2022 report. Respondents in prior quarters were contacted via telephone. With the shift to remote working and much higher reliance on the internet, responses are now being collected online.

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



# Notes to Editors

\* The methodology used to collect the data for the Employment Outlook has been digitized in 40 markets for the Q1 2022 report. Respondents in prior quarters were contacted via telephone and data is now being collected online. Respondents are members of double opt-in online panels and are incentivized to complete the survey. In line with standard findings of online surveys, more people are now taking a position – selecting that their workforce will either increase or decrease vs. no change. Because the Net Employment Outlook is based only on the people saying increase or decrease, the result of this higher level of engagement means the methodology shift may contribute to a higher Outlook. With a sample of 1000 there is a margin of error of +/-3%. The question asked and the respondent profile remains unchanged. Size of organization and sector are standardized across all countries to allow international comparisons.

\*\* The survey data was collected in October 2021, before awareness of the Omicron variant.





# A Holistic Workforce Strategy Includes Build, Buy, Borrow and Bridge



Invest in learning and development to grow your pipeline



Go to the external market to attract the talent that cannot be built-in-house



Cultivate communities of talent outside the organization



Help people move on or move up to new roles within the organization

# Learn More About Our Suite of HR & Workforce Solutions



**Workforce Consulting & Analytics**



**Workforce Management**



**Talent Resourcing**



**Career Management**



**Career Transition**



**Attracting Top Talent**

How can we help strengthen your future workforce strategy? You can choose more than one.

- ☐ Workforce consulting & analytics
- ☐ Workforce management
- ☐ Talent resourcing
- ☐ Career management
- ☐ Career transition
- ☐ Attracting top talent

**See results**

Thank you for reading the

# Q1 2022 ManpowerGroup Employment Outlook Survey

[www.manpowergroup.com](https://www.manpowergroup.com)

