

Q2 / 2010

Manpower  
Employment  
Outlook Survey  
UK

A Manpower Research Report

# Q2/10

## Contents

---

### UK Employment Outlook

1

Regional Comparisons

Sector Comparisons

---

### Global Employment Outlook

17

International Comparisons – EMEA

International Comparisons – Americas

International Comparisons – Asia Pacific

---

### About the Survey

26

---

### About Manpower

27

---

# UK Employment Outlook

The Manpower Employment Outlook Survey for the second quarter of 2010 was conducted by interviewing a representative sample of 2,102 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 June 2010 as compared to the current quarter?”

UK employers expect the labour market to continue to be subdued in Quarter 2 2010. While 8% of employers forecast an increase in headcount, 7% anticipate a decrease and 84% predict no change. As a result, the Net Employment Outlook stands at a reserved +1%.

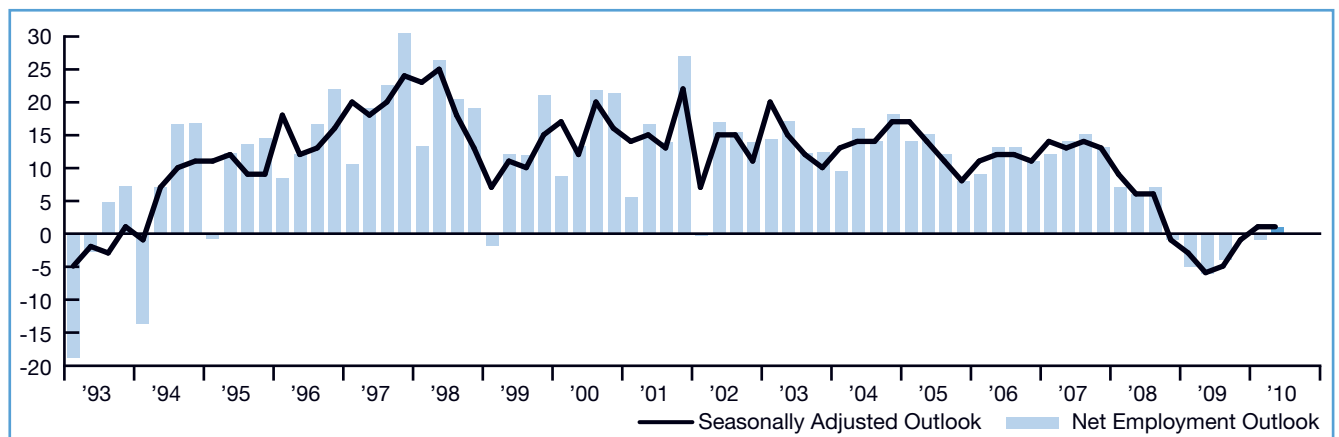
Throughout this report, we use the term “Net Employment Outlook.” This figure is derived by taking the percentage of employers anticipating total employment to increase, and subtracting from this the percentage expecting to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook.

Quarter-over-quarter, employers report a slight two percentage point improvement in the Outlook. When compared to Quarter 2 2009, hiring intentions are moderately stronger, by seven percentage points.

Once the data has been adjusted to account for seasonal variation, the Outlook stands at +1% for the second consecutive quarter. Year-over-year, it improves by seven percentage points.

From this point forward, all data discussed in the commentary is seasonally adjusted, unless stated otherwise.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted Outlook
	%	%	%	%	%	%
<b>2nd Quarter 2010</b>	<b>8</b>	<b>7</b>	<b>84</b>	<b>1</b>	<b>1</b>	<b>1</b>
1st Quarter 2010	9	10	79	2	-1	1
4th Quarter 2009	9	9	80	2	0	-1
3rd Quarter 2009	6	10	81	3	-4	-5
2nd Quarter 2009	5	11	81	3	-6	-6



No bar indicates Net Employment Outlook of zero.

## Regional Summary

Employers in six of the 12 regions forecast headcount growth in Quarter 2 2010. The most upbeat hiring prospects are reported in the East, where the Net Employment Outlook stands at +12%. Employers anticipate modest growth in staffing levels in the South West, where the Outlook is +5%, and the South East, which has an Outlook of +4%. Meanwhile, employers in four regions forecast negative headcount growth, with the weakest Outlook of -9% reported in the West Midlands. Struggling hiring prospects are also reported by employers in Wales and Northern Ireland, with Outlooks of -6% and -5%, respectively.

Quarter-over-quarter, hiring intentions are stronger in six regions. The most notable improvements are reported by employers in Wales, where the Outlook is seven percentage points stronger, and in the East, where it increases by six percentage points. Meanwhile, employers in four regions report weaker hiring plans,

including Northern Ireland, where the Outlook declines by a considerable 11 percentage points. Year-over-year, the Outlook is stronger in ten of the 12 regions, with the most noteworthy improvements of 12 percentage points in the East and 11 percentage points in Northern Ireland.

Based on unadjusted survey data, employers forecast positive hiring activity in six of the 12 regions during Quarter 2 2010. The strongest hiring prospects are reported in the East. Employers in five regions predict negative headcount growth, with the weakest labour market reported in the West Midlands. Quarter-over-quarter, hiring prospects are stronger in seven regions, with the most notable improvement in the East, but weaker in three, including a considerable decline in the Outlook reported by Northern Ireland employers. Year-over-year, the Outlook strengthens in ten of the 12 regions.

	Increase Q2 2010	Decrease Q2 2010	Q2 2010	Q1 2010	Q2 2009	Qtr on Qtr Change Q1 2010 to Q2 2010	Yr on Yr Change Q2 2009 to Q2 2010
	%	%	%	%	%	%	%
East	19	4	15 (12) <sup>1</sup>	2 (6) <sup>1</sup>	-1 (0) <sup>1</sup>	13 (6) <sup>1</sup>	16 (12) <sup>1</sup>
East Midlands	6	9	-3 (1) <sup>1</sup>	6 (3) <sup>1</sup>	0 (1) <sup>1</sup>	-9 (-2) <sup>1</sup>	-3 (0) <sup>1</sup>
London	5	7	-2 (0) <sup>1</sup>	2 (2) <sup>1</sup>	-7 (-5) <sup>1</sup>	-4 (-2) <sup>1</sup>	5 (5) <sup>1</sup>
North East	8	7	1 (1) <sup>1</sup>	1 (1) <sup>1</sup>	2 (2) <sup>1</sup>	0 (0) <sup>1</sup>	-1 (-1) <sup>1</sup>
North West	3	3	0 (0) <sup>1</sup>	-7 (-3) <sup>1</sup>	-4 (-4) <sup>1</sup>	7 (3) <sup>1</sup>	4 (4) <sup>1</sup>
Northern Ireland	6	11	-5 (-5) <sup>1</sup>	6 (6) <sup>1</sup>	-16 (-16) <sup>1</sup>	-11 (-11) <sup>1</sup>	11 (11) <sup>1</sup>
Scotland	12	11	1 (-1) <sup>1</sup>	-5 (-2) <sup>1</sup>	-3 (-5) <sup>1</sup>	6 (1) <sup>1</sup>	4 (4) <sup>1</sup>
South East	5	1	4 (4) <sup>1</sup>	-1 (1) <sup>1</sup>	-3 (-3) <sup>1</sup>	5 (3) <sup>1</sup>	7 (7) <sup>1</sup>
South West	10	5	5 (5) <sup>1</sup>	5 (5) <sup>1</sup>	0 (0) <sup>1</sup>	0 (0) <sup>1</sup>	5 (5) <sup>1</sup>
Wales	7	13	-6 (-6) <sup>1</sup>	-13 (-13) <sup>1</sup>	-13 (-13) <sup>1</sup>	7 (7) <sup>1</sup>	7 (7) <sup>1</sup>
West Midlands	4	11	-7 (-9) <sup>1</sup>	-11 (-4) <sup>1</sup>	-16 (-18) <sup>1</sup>	4 (-5) <sup>1</sup>	9 (9) <sup>1</sup>
Yorkshire & Humberside	8	5	3 (2) <sup>1</sup>	2 (0) <sup>1</sup>	-3 (-3) <sup>1</sup>	1 (2) <sup>1</sup>	6 (5) <sup>1</sup>

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

## Sector Summary

Headcount growth is forecast by employers in four of the nine industry sectors during Quarter 2 2010. Utilities sector employers report a cautiously optimistic Net Employment Outlook of +6%, while in the Finance & Business Services sector the Outlook is a conservative +5%. However, employers in three sectors predict negative headcount growth. The weakest hiring prospects are reported by Transport & Communications sector employers, with a disappointing Outlook of -7%.

Quarter-over-quarter, hiring intentions have strengthened in five of the nine industry sectors. The Outlook for the Construction sector improves by five percentage points. Weaker hiring plans are evident in three sectors, including a three percentage point decline reported by Finance & Business Services employers. Year-over-year, employers in five sectors report stronger hiring intentions.

A considerable improvement of 15 percentage points is reported by Construction sector employers, and in the Finance & Business Services Outlook where employers report an improvement of 12 percentage points. However, in the Agriculture sector, the Outlook declines by four percentage points.

Based on unadjusted survey data, employers in four industry sectors anticipate headcount growth in Quarter 2 2010. Mild headcount gains are predicted both in the Utilities sector and the Finance & Business Services sector. However, employers in three sectors forecast negative headcount growth, most notably in the Transport & Communications sector.

Quarter-over-quarter, the Outlook strengthens in six of the nine sectors, while year-over-year it improves in five. The Construction sector Outlook improves considerably both quarter-over-quarter and year-over-year.

	Increase Q2 2010	Decrease Q2 2010	Q2 2010	Q1 2010	Q2 2009	Qtr on Qtr Change Q1 2010 to Q2 2010	Yr on Yr Change Q2 2009 to Q2 2010
	%	%	%	%	%	%	%
Agriculture	6	5	1 (0) <sup>1</sup>	-3 (-2) <sup>1</sup>	7 (4) <sup>1</sup>	4 (2) <sup>1</sup>	-6 (-4) <sup>1</sup>
Community & Social	8	8	0 (1) <sup>1</sup>	-1 (0) <sup>1</sup>	0 (1) <sup>1</sup>	1 (1) <sup>1</sup>	0 (0) <sup>1</sup>
Construction	6	7	-1 (-2) <sup>1</sup>	-13 (-7) <sup>1</sup>	-16 (-17) <sup>1</sup>	12 (5) <sup>1</sup>	15 (15) <sup>1</sup>
Finance & Business Services	10	5	5 (5) <sup>1</sup>	8 (8) <sup>1</sup>	-7 (-7) <sup>1</sup>	-3 (-3) <sup>1</sup>	12 (12) <sup>1</sup>
Hotels & Retail	6	8	-2 (-3) <sup>1</sup>	-4 (-2) <sup>1</sup>	-7 (-8) <sup>1</sup>	2 (-1) <sup>1</sup>	5 (5) <sup>1</sup>
Manufacturing	7	5	2 (1) <sup>1</sup>	-4 (-2) <sup>1</sup>	-7 (-4) <sup>1</sup>	6 (3) <sup>1</sup>	9 (5) <sup>1</sup>
Mining	11	11	0 (0) <sup>1</sup>	1 (1) <sup>1</sup>	-5 (-5) <sup>1</sup>	-1 (-1) <sup>1</sup>	5 (5) <sup>1</sup>
Transport & Communications	4	11	-7 (-7) <sup>1</sup>	-9 (-7) <sup>1</sup>	-4 (-4) <sup>1</sup>	2 (0) <sup>1</sup>	-3 (-3) <sup>1</sup>
Utilities	11	7	4 (6) <sup>1</sup>	6 (3) <sup>1</sup>	4 (6) <sup>1</sup>	-2 (3) <sup>1</sup>	0 (0) <sup>1</sup>

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

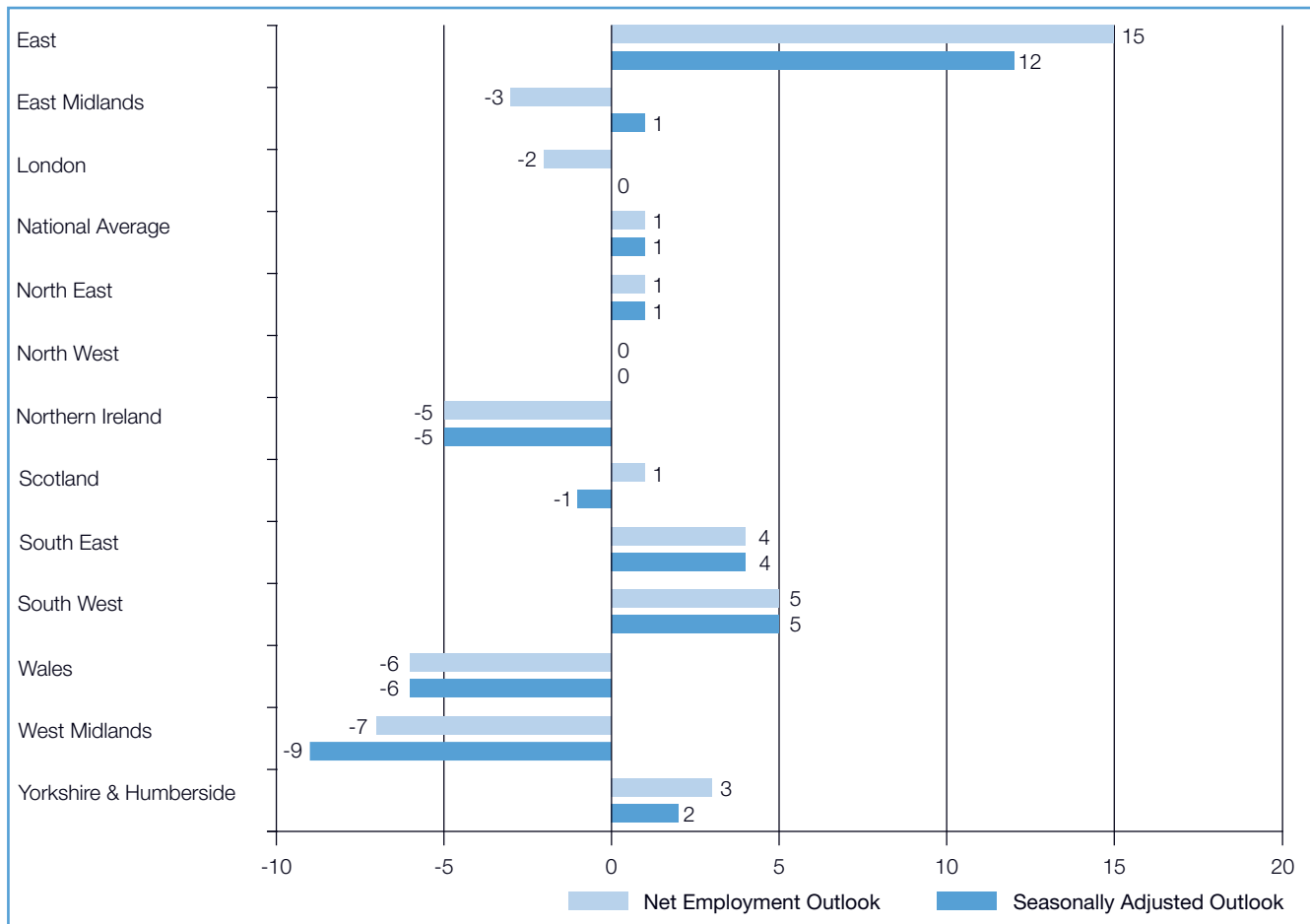
## Regional Comparisons

Employers in six of the 12 regions anticipate positive hiring activity during Quarter 2 2010. The strongest hiring prospects are reported by employers in the East, with a Net Employment Outlook of +12%. Elsewhere, hiring plans are more cautious, including a modest Outlook of +5% reported by employers in the South West, and an Outlook of +4% in the South East. Negative headcount growth is anticipated by employers in four regions. The weakest hiring prospects are reported by West Midlands employers, with an Outlook of -9%. Disappointing hiring plans are also evident in Wales, with an Outlook of -6%, and Northern Ireland, where employers report an Outlook of -5%.

Quarter-over-quarter, hiring intentions strengthen in six of the 12 regions. The most notable improvements are reported by employers in Wales and the East, with Outlooks increasing by seven and six percentage points, respectively. However, employers in four regions report weaker hiring plans, most notably in Northern Ireland, where the Outlook declines by a considerable 11 percentage points.

Year-over-year, the Outlook is stronger in ten of the 12 regions. Employers in the East report a 12 percentage point increase, while in Northern Ireland the Outlook is 11 percentage points stronger. West Midlands employers report a nine percentage point improvement, while the Outlook increases by seven percentage points in both the South East and Wales.

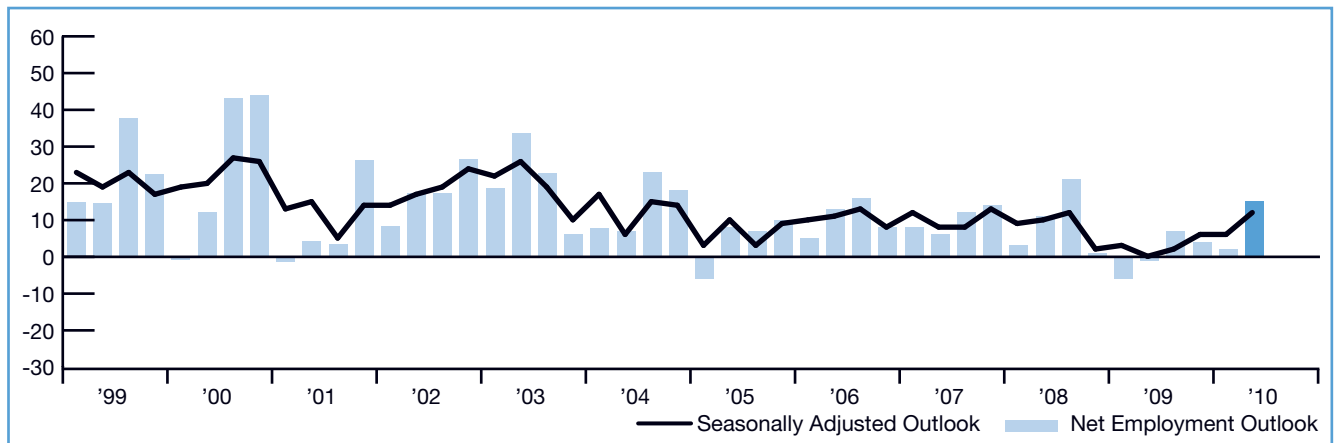
Based on unadjusted survey data, employers in six of the 12 regions anticipate some headcount growth in Quarter 2 2010, with the most upbeat hiring prospects in the East. Meanwhile, employers in five regions forecast negative headcount growth, with the weakest hiring intentions reported in the West Midlands. Quarter-over-quarter, the Outlook strengthens in seven regions, most notably the East, while year-over-year, it improves in ten regions.



## East +15 (12)%

Employers in the East report their strongest hiring intentions since Quarter 3 2008, with an upbeat Net Employment Outlook for Quarter 2 2010 of +12%. The Outlook improves by six percentage points over the previous quarter and by a considerable 12 percentage points year-over-year.

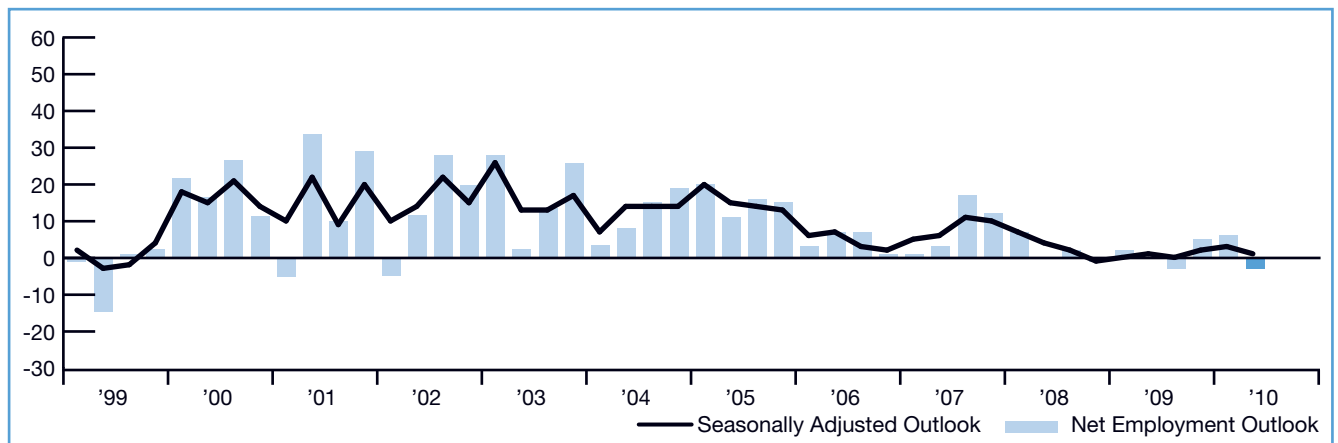
Based on unadjusted survey data, employers anticipate positive headcount gains in the upcoming quarter. The Outlook is considerably stronger both quarter-over-quarter and year-over-year.



## East Midlands -3 (1)%

Employers forecast a quiet labour market in Quarter 2 2010, reporting a Net Employment Outlook of +1%. The Outlook is two percentage points weaker when compared to Quarter 1 2010, but is unchanged year-over-year.

Based on unadjusted survey data, employers forecast muted hiring activity in Quarter 2 2010. The Outlook weakens considerably quarter-over-quarter, and is also slightly weaker year-over-year.

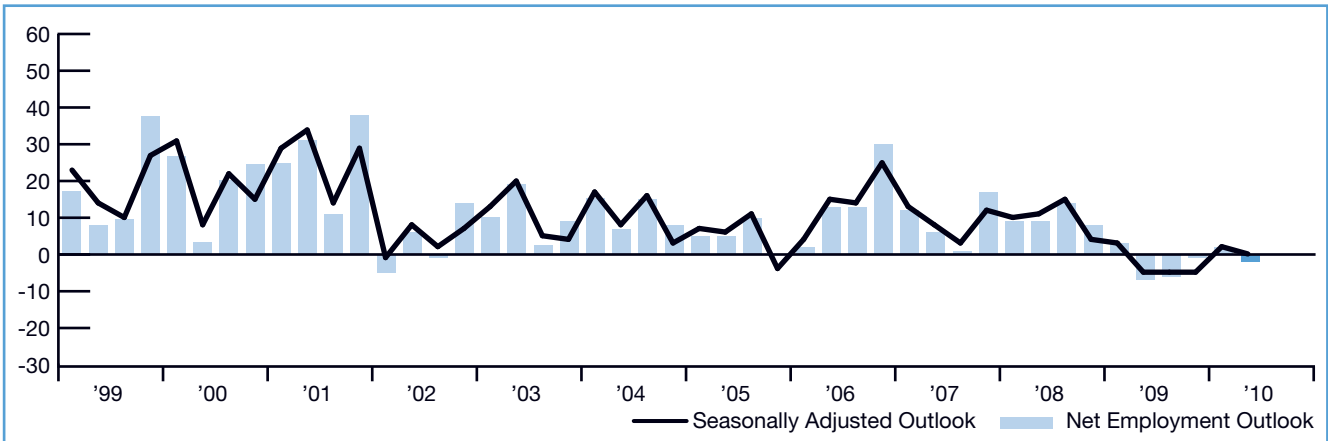


No bar indicates Net Employment Outlook of zero.

### London -2 (0)%

The London labour market is expected to be quiet in Quarter 2 2010, with employers reporting a flat Net Employment Outlook of 0%. Hiring plans weakened by a slight two percentage points over the previous quarter, but year-over-year the Outlook improves by five percentage points.

Based on unadjusted survey data, employers report uncertain hiring plans for the upcoming quarter, reflecting a slight decline in the Outlook compared to Quarter 1 2010. Year-over-year, the Outlook is moderately stronger.

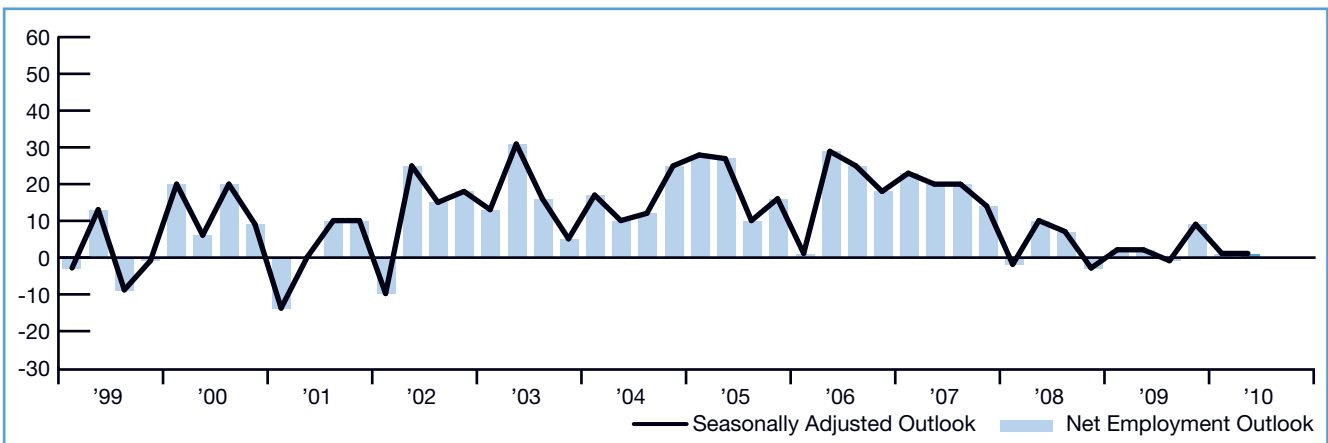


No bar indicates Net Employment Outlook of zero.

### North East +1 (1)%

For the second consecutive quarter, employers anticipate a subdued labour market with a Net Employment Outlook of +1%. Year-over-year, the Outlook remains relatively stable.

Based on unadjusted survey data, employers report reserved hiring plans for Quarter 2 2010. The Outlook is unchanged quarter-over-quarter and remains relatively stable year-over-year.

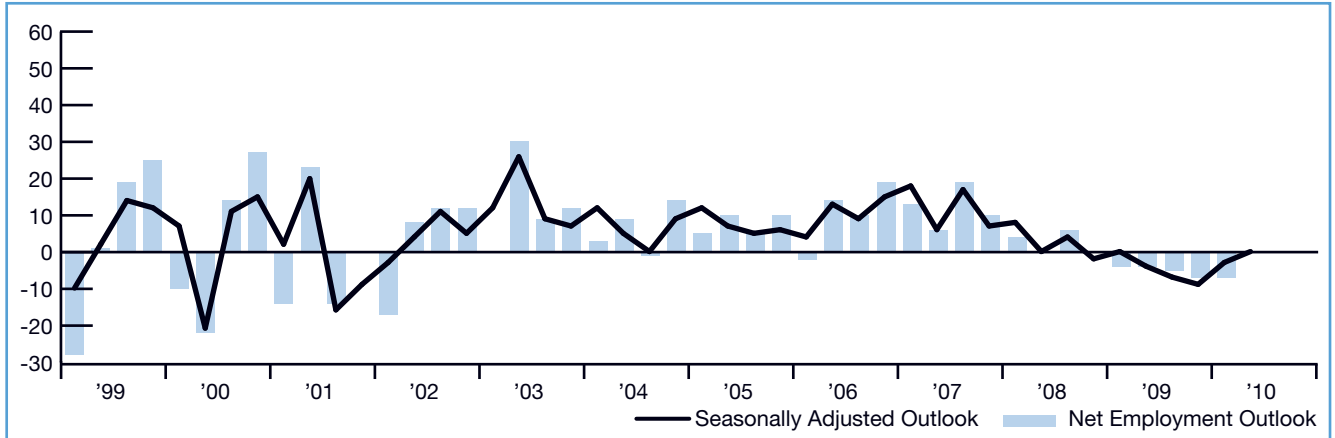


No bar indicates Net Employment Outlook of zero.

## North West 0 (0)%

Flat hiring activity is forecast in the North West, with employers reporting a Net Employment Outlook of 0% for Quarter 2 2010. The Outlook improves slightly both quarter-over-quarter and year-over-year, by three and four percentage points, respectively.

Based on unadjusted survey data, employers anticipate a quiet labour market in Quarter 2 2010. Quarter-over-quarter, the Outlook is moderately stronger, and it also improves slightly year-over-year.

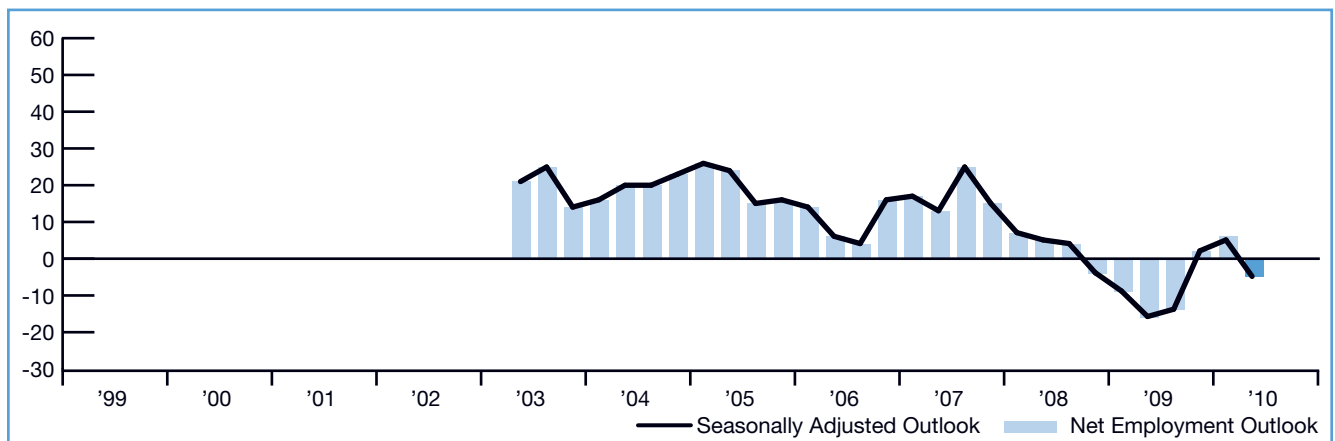


No bar indicates Net Employment Outlook of zero.

## Northern Ireland -5 (-5)%

Employers anticipate a sluggish hiring pace in Quarter 2 2010, reporting a weak Net Employment Outlook of -5%. Quarter-over-quarter, the Outlook is 11 percentage points weaker, although it improves by 11 percentage points year-over-year.

Based on unadjusted survey data, employers forecast a disappointing hiring environment in the upcoming quarter. The Outlook is considerably weaker than in Quarter 1 2010, but improves considerably year-over-year.

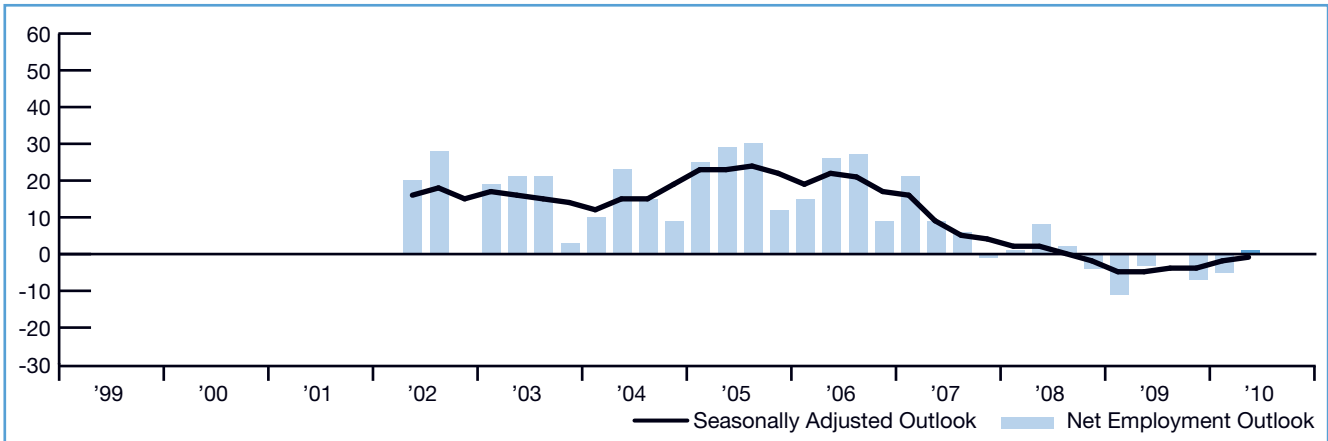


Northern Ireland joined the survey in Q2 2003.

### Scotland +1 (-1)%

With a Net Employment Outlook of -1%, Scottish employers report mixed hiring intentions for the upcoming quarter. The Outlook remains relatively stable quarter-over-quarter, but is four percentage points stronger year-over-year.

Based on unadjusted survey data, employers report subdued hiring plans for the upcoming quarter, although the Outlook is stronger both quarter-over-quarter and year-over-year.

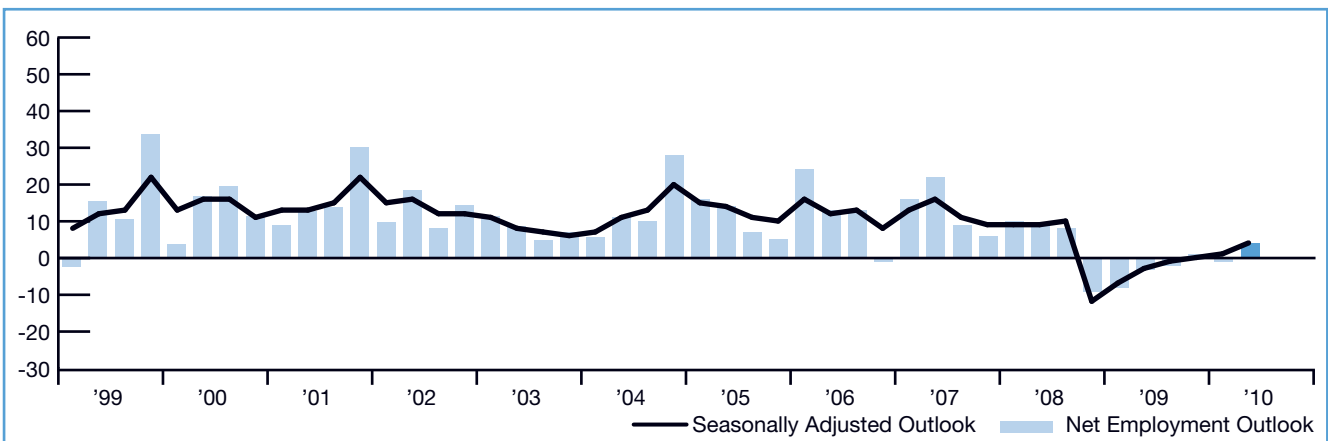


Scotland joined the survey in Q2 2002. No bar indicates Net Employment Outlook of zero.

### South East +4 (4)%

With a Net Employment Outlook of +4%, employers in the South East report their most optimistic hiring plans since Quarter 3 2008. The Outlook improves both quarter-over-quarter and year-over-year, by three and seven percentage points, respectively.

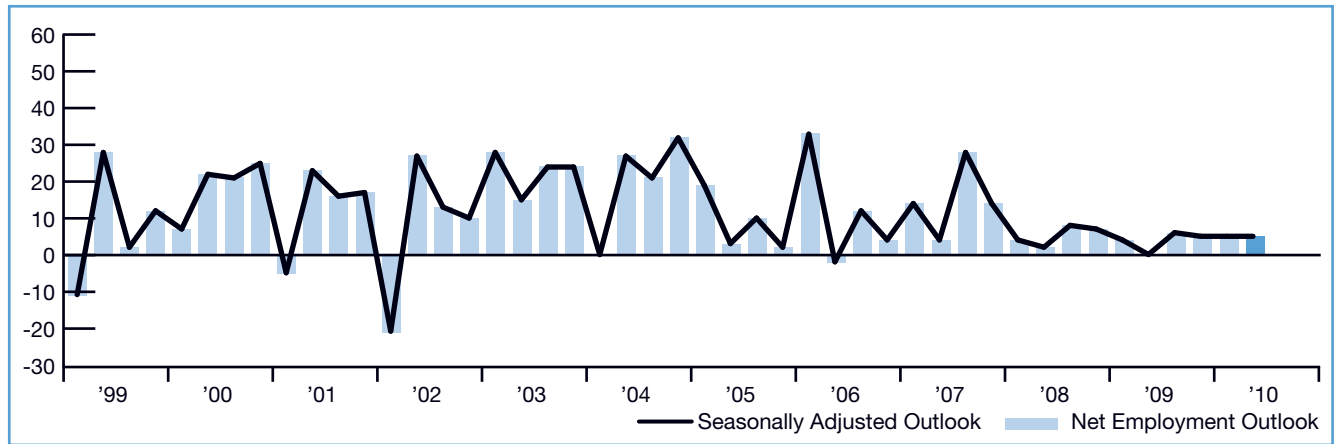
Based on unadjusted survey data, employers predict modest headcount growth in the coming quarter. The Outlook strengthens both quarter-over-quarter and year-over-year.



## South West +5 (5)%

For the third consecutive quarter, employers report a cautiously optimistic Net Employment Outlook of +5%. Year-over-year, the Outlook improves by five percentage points.

Based on unadjusted survey data, employers anticipate modest headcount growth in the coming quarter. The Outlook is unchanged quarter-over-quarter, and moderately stronger year-over-year.

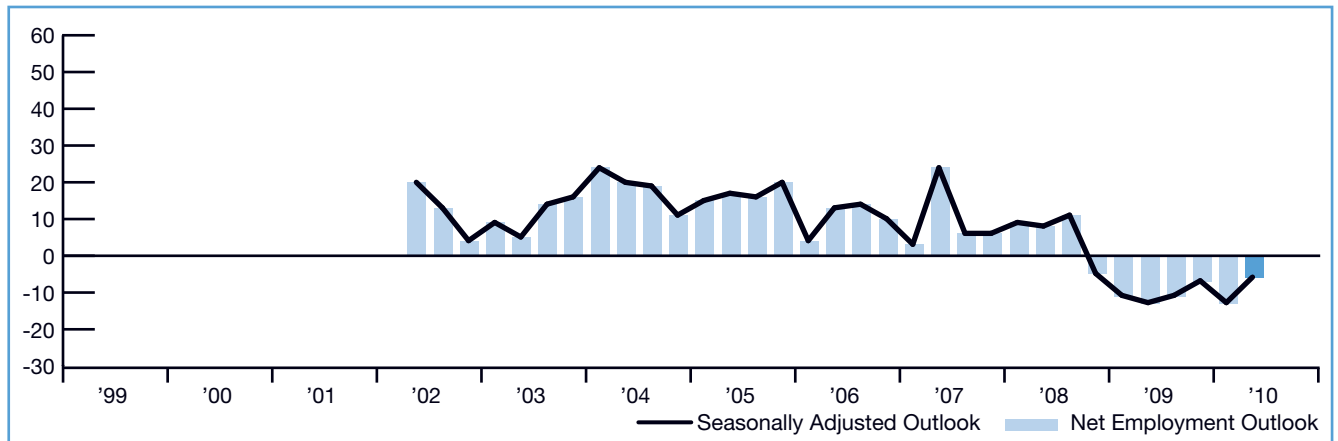


No bar indicates Net Employment Outlook of zero.

## Wales -6 (-6)%

For the seventh consecutive quarter, Welsh employers report a negative Net Employment Outlook, indicating disappointing hiring plans for Quarter 2 2010. However, the Outlook has strengthened by seven percentage points both quarter-over-quarter and year-over-year.

Based on unadjusted survey data, employers anticipate a continued slump in hiring activity during Quarter 2 2010. However, the Outlook has improved moderately both quarter-over-quarter and year-over-year.

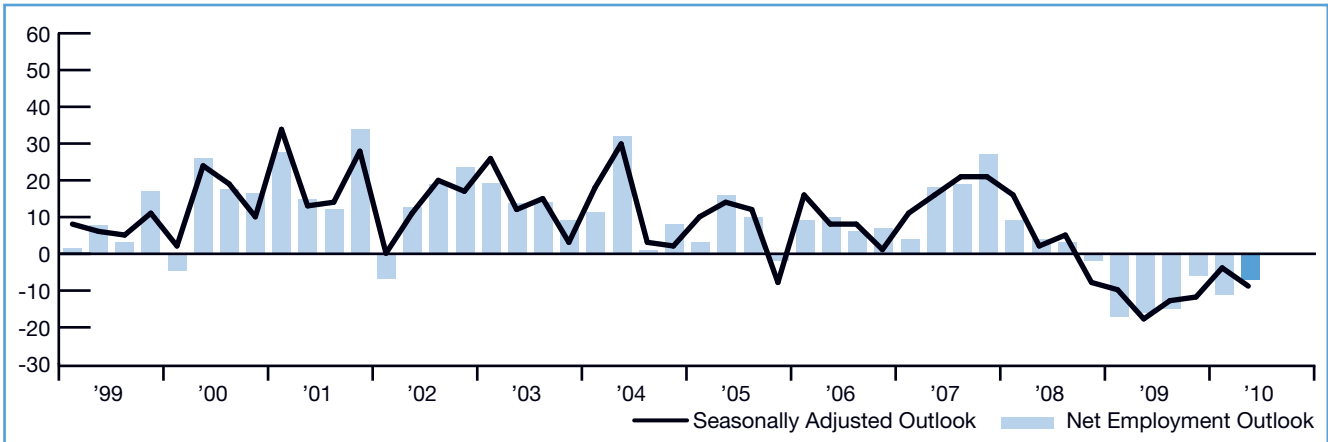


Wales joined the survey in Q2 2002.

### West Midlands -7 (-9)%

For the seventh consecutive quarter, West Midlands employers report a negative Net Employment Outlook. Standing at -9%, the Outlook reflects pessimism over hiring prospects in Quarter 2 2010. The Outlook is five percentage points weaker quarter-over-quarter, but a considerable nine percentage points stronger year-over-year.

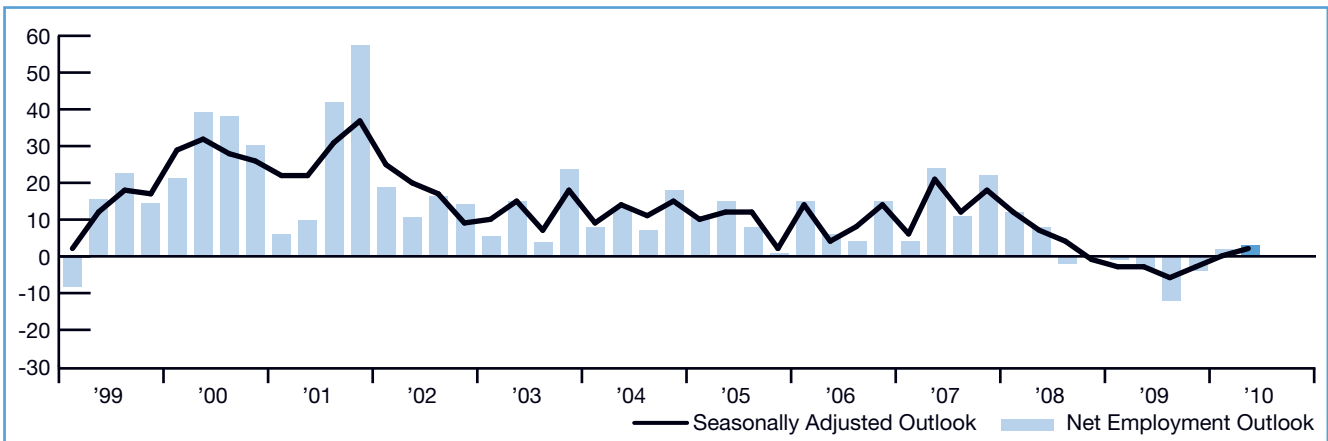
Based on unadjusted survey data, employers forecast a weak hiring climate in Quarter 2 2010, but hiring plans have strengthened both quarter-over-quarter and year-over-year.



### Yorkshire & Humberside +3 (2)%

Employers anticipate a quiet labour market in Quarter 2 2010, reporting a reserved Net Employment Outlook of +2%. Quarter-over-quarter, the Outlook is stronger by a slight two percentage points, and has also improved year-over-year, by five percentage points.

Based on unadjusted survey data, employers anticipate cautious headcount growth in the forthcoming quarter. The Outlook remains relatively stable quarter-over-quarter, and improves moderately year-over-year.



No bar indicates Net Employment Outlook of zero.

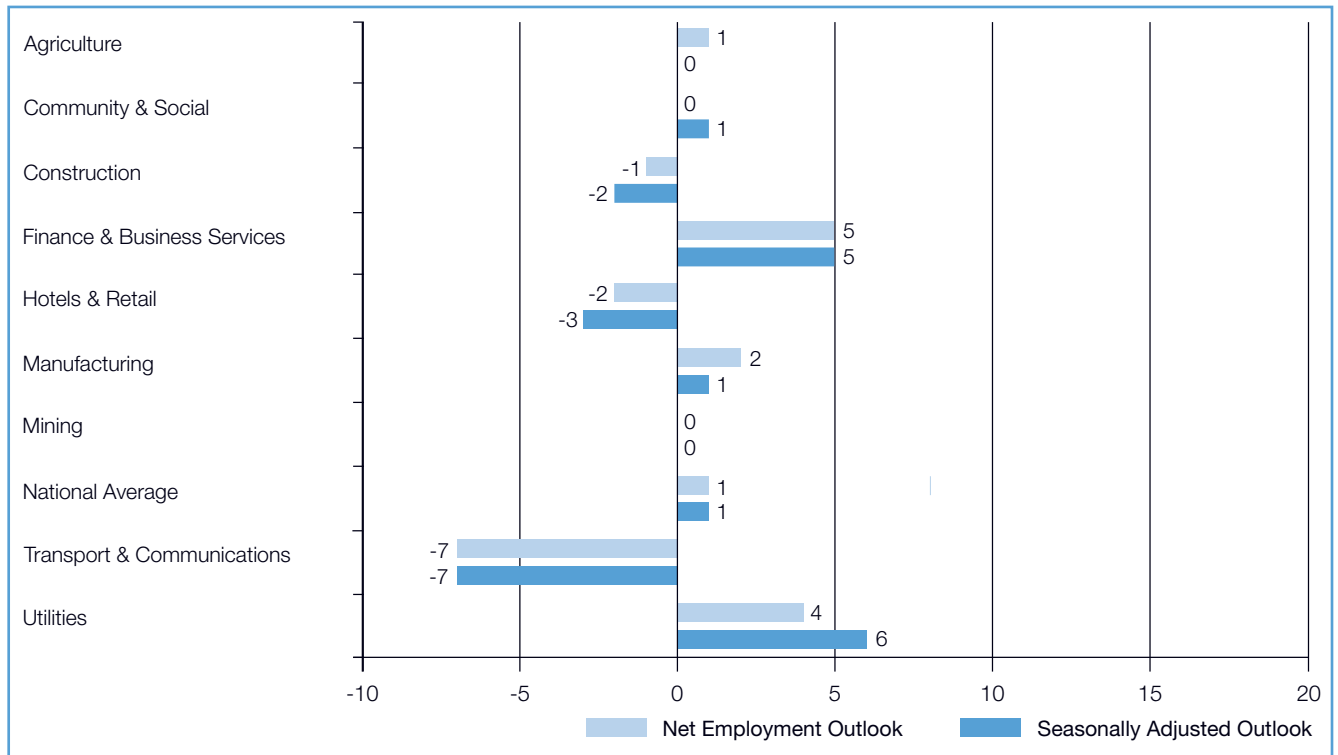
## Sector Comparisons

Employers in four of the nine industry sectors anticipate some headcount growth in Quarter 2 2010. Cautiously optimistic hiring plans are evident in the Utilities sector, where employers report a Net Employment Outlook of +6%, and in the Finance & Business Services sector, where the Outlook is +5%. Meanwhile, employers in three sectors forecast negative headcount growth. The weakest Outlook of -7% is reported by Transport & Communications sector employers.

Quarter-over-quarter, employers in five industry sectors report stronger Outlooks. In the Construction sector, the Outlook improves by five percentage points, while employers report slight increases of three percentage points in both the Utilities sector and the Manufacturing sector. The Outlook is weaker in three sectors, most notably the Finance & Business Services sector, where it declines by three percentage points.

Year-over-year, hiring plans have strengthened in five industry sectors. Employers in the Construction sector report a considerable 15 percentage point improvement, while the Finance & Business Services Outlook is 12 percentage points stronger. Employers report five percentage point improvements in the Outlooks for the Manufacturing sector, the Mining sector and the Hotels & Retail sector. Meanwhile, Outlooks for the Agriculture sector and the Transport & Communications sector are both slightly weaker, declining by four and three percentage points, respectively.

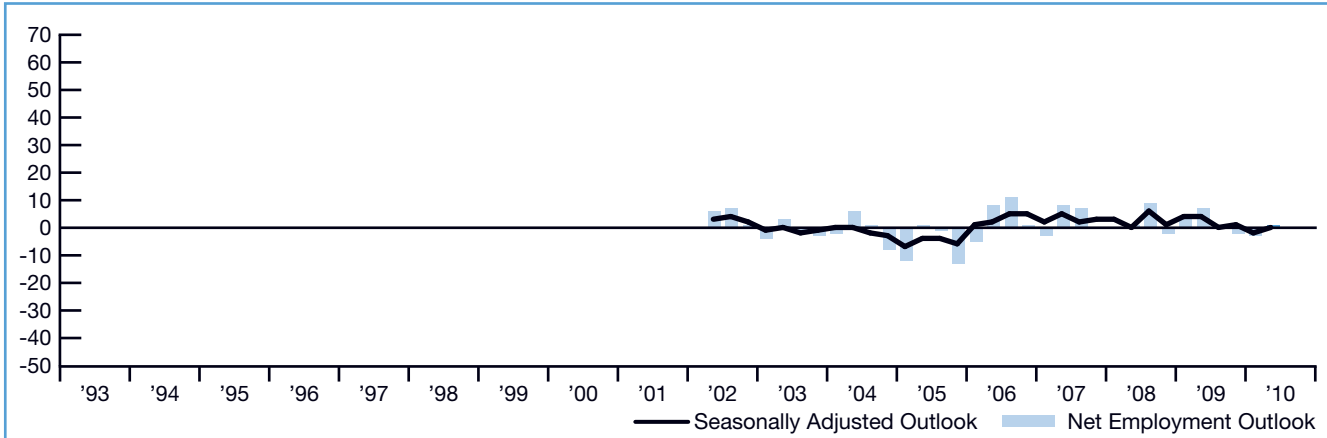
Based on unadjusted survey data, employers forecast headcount growth in four industry sectors, although only on a modest scale. Employers in three sectors anticipate negative headcount growth. Quarter-over-quarter, employers in six sectors report improved hiring prospects, most notably for job seekers in the Construction sector. Employers in five sectors report stronger Outlooks year-over-year.



### Agriculture +1 (0)%

Employers forecast a flat hiring climate in Quarter 2 2010, reporting a Net Employment Outlook of 0%. The Outlook is two percentage points stronger compared to the previous quarter, but four percentage points weaker year-over-year.

Based on unadjusted survey data, employers report reserved hiring intentions for the upcoming quarter. While the Outlook is slightly stronger quarter-over-quarter, it is moderately weaker year-over-year.

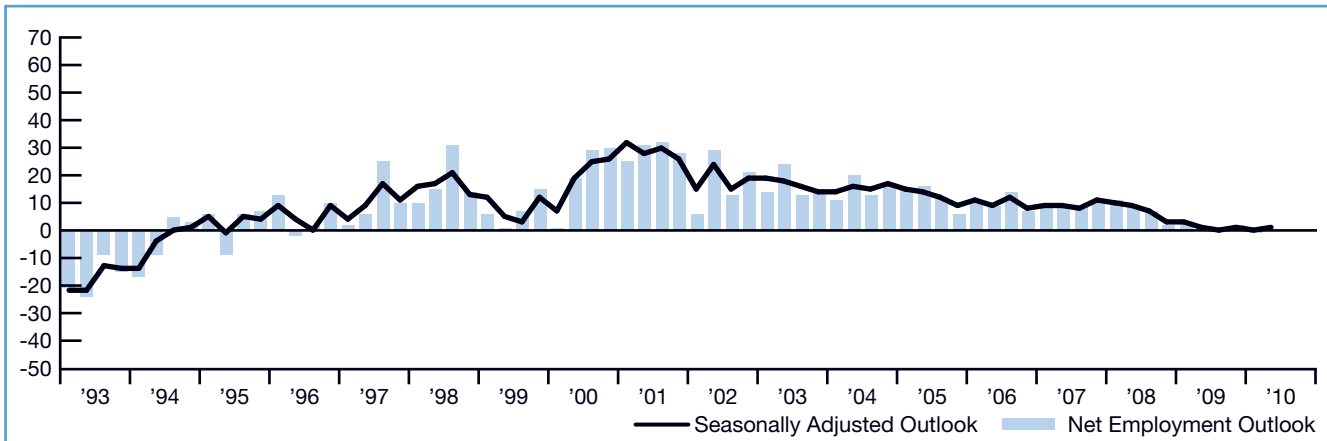


The Agriculture sector joined the survey in Q2 2002. No bar indicates Net Employment Outlook of zero.

### Community & Social 0 (1)%

Employers anticipate a subdued labour market in Quarter 2 2010, reporting a Net Employment Outlook of +1%. The Outlook remains moderately stable quarter-over-quarter and is unchanged year-over-year.

Based on unadjusted survey data, employers forecast a quiet hiring climate in the forthcoming quarter. The Outlook remains moderately stable quarter-over-quarter and is unchanged year-over-year.

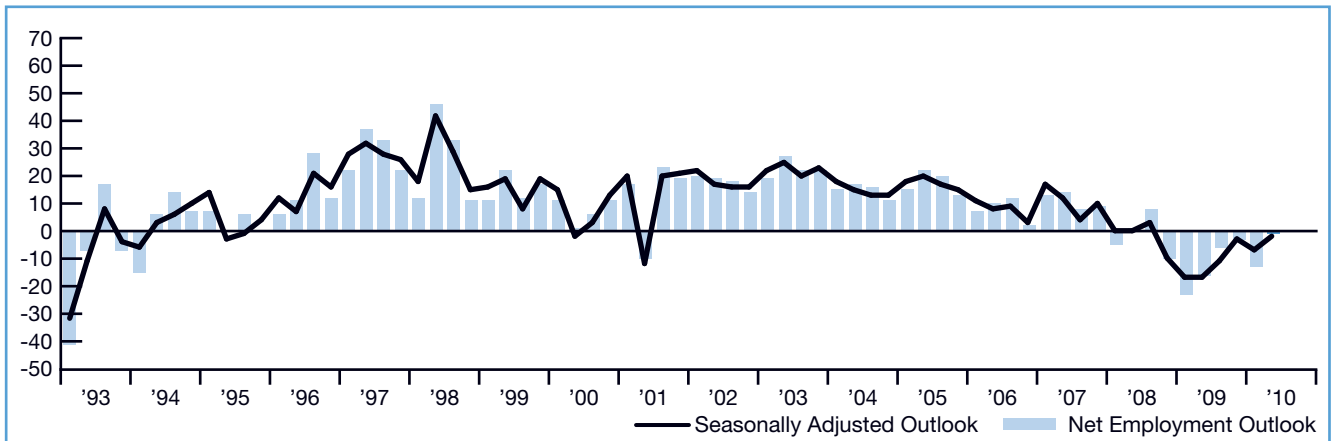


No bar indicates Net Employment Outlook of zero.

## Construction -1 (-2)%

With a Net Employment Outlook of -2%, employers report uncertain hiring plans for Quarter 2 2010. Although this is the seventh consecutive negative Outlook in the sector, hiring plans are stronger both quarter-over-quarter and year-over-year, improving by five and 15 percentage points, respectively.

Based on unadjusted survey data, employers anticipate a subdued labour market in Quarter 2 2010. However, the Outlook is considerably stronger both quarter-over-quarter and year-over-year.



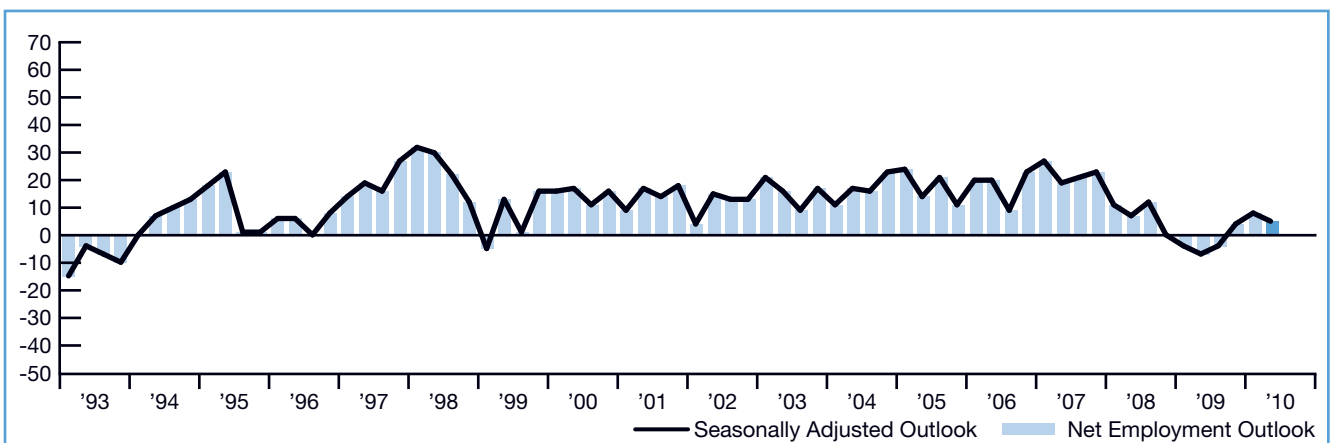
No bar indicates Net Employment Outlook of zero.

## Finance & Business Services +5 (5)%

Some opportunities for headcount growth are likely in Quarter 2 2010, according to employers who report a cautiously optimistic Net Employment Outlook of +5%. While the Outlook is three percentage points weaker quarter-over-quarter, it has improved by a considerable 12 percentage points year-over-year.

Based on unadjusted survey data, employers anticipate modest headcount growth in the upcoming quarter. The Outlook is slightly weaker quarter-over-quarter, but considerably stronger year-over-year.

Employers in the Finance sub-sector report cautiously optimistic hiring intentions for Quarter 2 2010, with a Net Employment Outlook of +8%. The Finance sub-sector Outlook improves moderately both quarter-over-quarter and year-over-year, by five and six percentage points, respectively. In the Business Services sub-sector, employers anticipate modest headcount growth in the coming quarter with an Outlook of +5%. The Business Services sub-sector Outlook declines by a slight three percentage points quarter-over-quarter, but is a significant 12 percentage points stronger year-over-year.



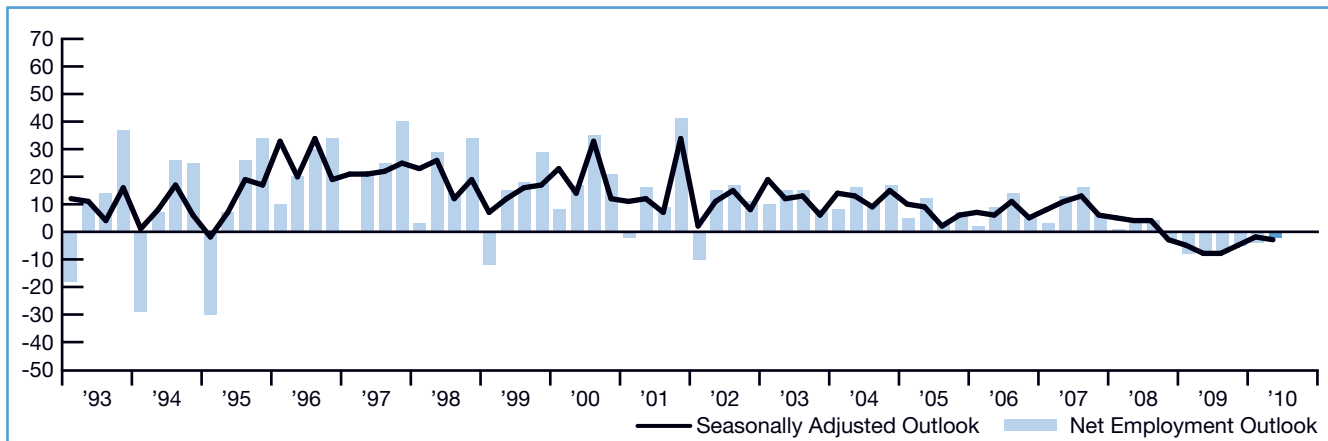
No bar indicates Net Employment Outlook of zero.

## Hotels & Retail -2 (-3)%

For the seventh consecutive quarter, employers in the Hotels & Retail sector report a negative Outlook. Standing at -3%, employers forecast a downbeat hiring pace in Quarter 2 2010. The Outlook remains relatively stable quarter-over-quarter, but employers are reporting a moderate five percentage point improvement year-over-year.

Based on unadjusted survey data, employers anticipate a subdued labour market in the upcoming quarter. However, the Outlook improves slightly quarter-over-quarter, and is moderately stronger year-over-year.

B2B sub-sector employers anticipate modest headcount gains in Quarter 2 2010, reporting a Net Employment Outlook of +6%; the sub-sector Outlook improves by five percentage points over the previous quarter and six percentage points year-over-year. In the B2C sub-sector, employers report a disappointing Outlook of -5% for the second consecutive quarter; year-over-year, however, the sub-sector Outlook improves by four percentage points. In the Hotels & Restaurants sub-sector, employers anticipate an uncertain hiring pace in the coming quarter with an Outlook of -1%; but the Outlook is stronger both quarter-over-quarter and year-over-year, improving by five and seven percentage points, respectively.

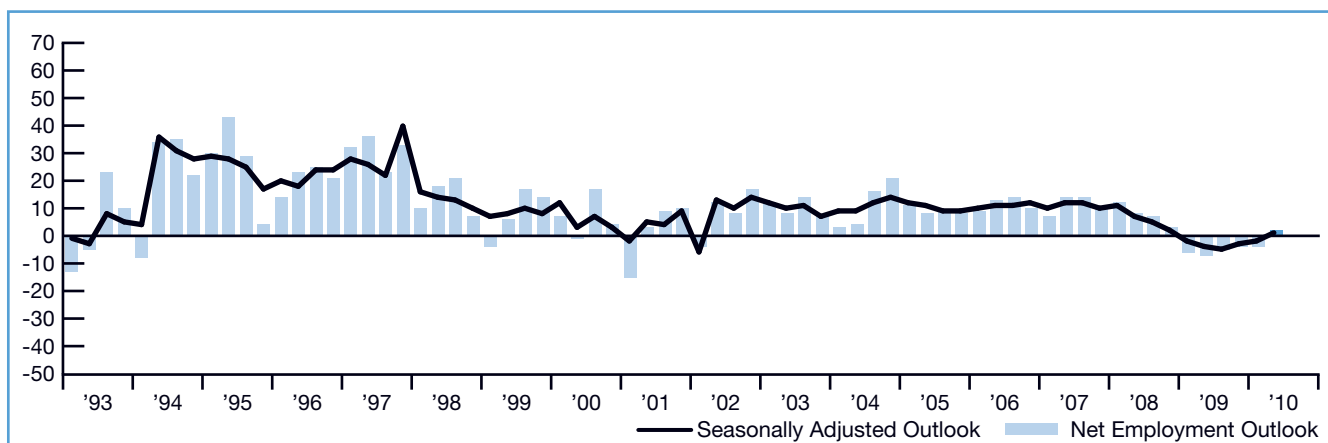


No bar indicates Net Employment Outlook of zero.

## Manufacturing +2 (1)%

Manufacturing employers report encouraging signs in the labour market for Quarter 2 2010, with a Net Employment Outlook of +1%. The Outlook has improved both quarter-over-quarter and year-over-year, increasing by three and five percentage points, respectively.

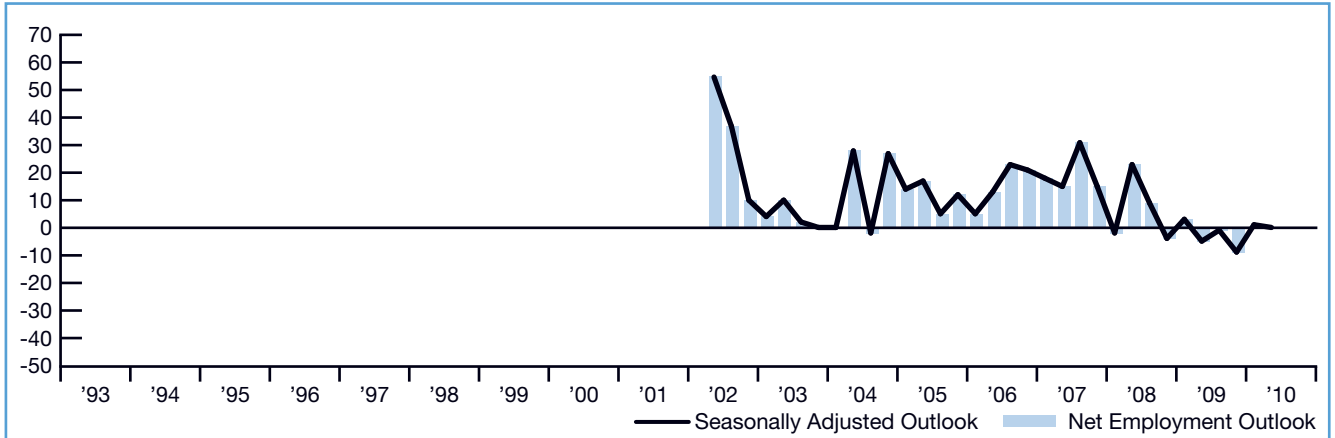
Based on unadjusted survey data, employers anticipate a cautious hiring climate in Quarter 2 2010. The Outlook strengthens both quarter-over-quarter and year-over-year.



## Mining 0 (0)%

A flat labour market is anticipated in Quarter 2 2010, with employers reporting a Net Employment Outlook of 0%. The Outlook remains relatively stable quarter-over-quarter, but has improved by a moderate five percentage points when compared to Quarter 2 2009.

Based on unadjusted survey data, employers report mixed hiring intentions for Quarter 2 2010. The Outlook remains relatively stable quarter-over-quarter and is moderately stronger year-over-year.



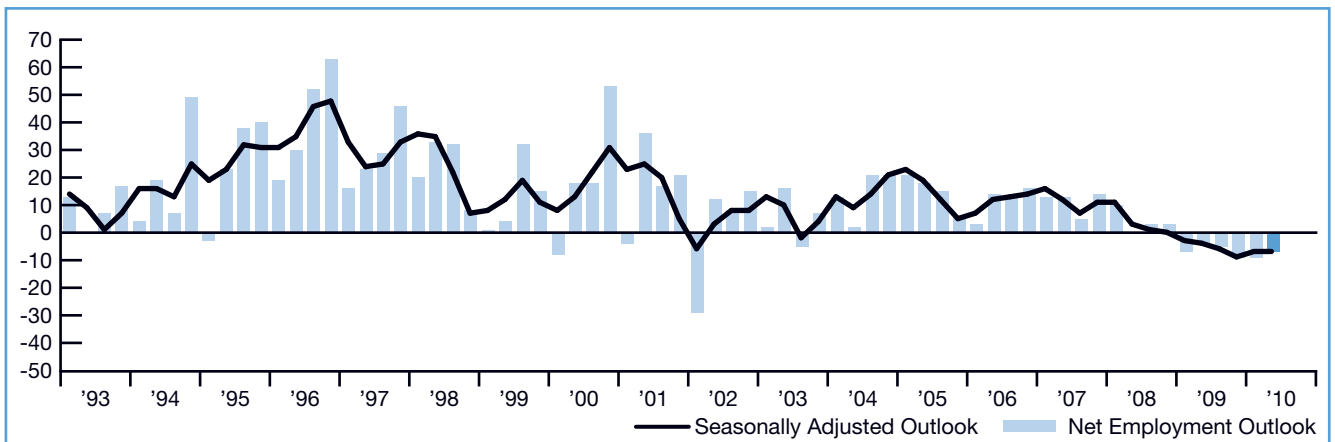
The Mining sector joined the survey in Q2 2002. No bar indicates Net Employment Outlook of zero.

## Transport & Communications -7 (-7)%

For the second consecutive quarter, employers report a pessimistic Net Employment Outlook of -7%. Employers have reported negative Outlooks for six consecutive quarterly surveys. Year-over-year, the Outlook declines slightly, by three percentage points.

In the Telecomms sub-sector, employers report a reserved Net Employment Outlook of +2%. The Outlook declines both quarter-over-quarter and year-over-year, by four and three percentage points, respectively. In the Transport sub-sector, employers anticipate a downbeat hiring climate in Quarter 2 2010, with an Outlook of -10%. The Outlook improves by three percentage points over the previous quarter, but is four percentage points weaker year-over-year.

Based on unadjusted survey data, employers anticipate a disappointing hiring pace in the coming quarter, although the Outlook improves slightly compared with Quarter 1 2010. Year-over-year however, the Outlook is slightly weaker.

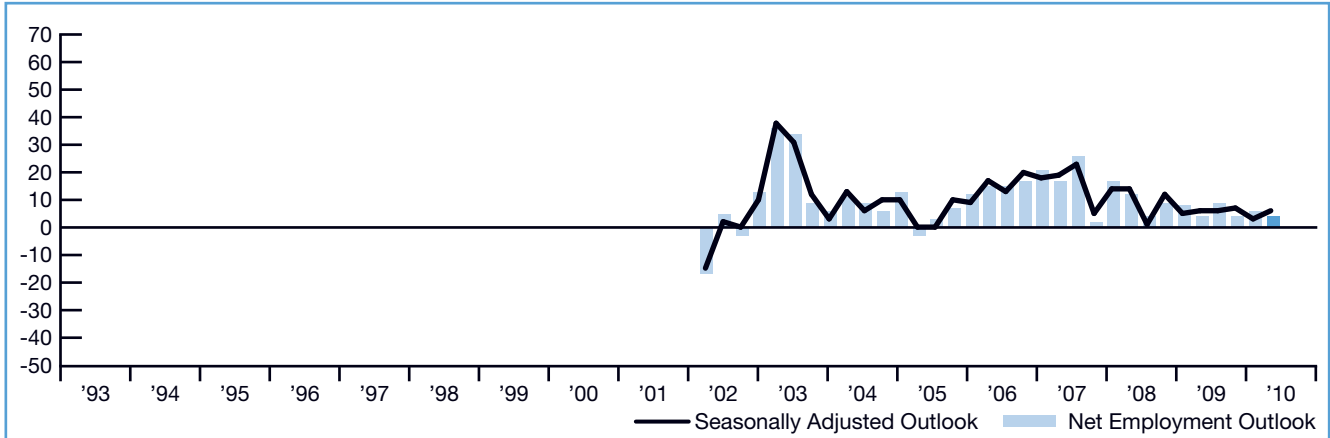


No bar indicates Net Employment Outlook of zero.

### Utilities +4 (6)%

Employers anticipate modest headcount gains in Quarter 2 2010, reporting a Net Employment Outlook of +6%. The Outlook strengthens by three percentage points when compared to the previous quarter, but is unchanged year-over-year.

Based on unadjusted survey data, employers anticipate mild headcount growth in the upcoming quarter. The Outlook is slightly weaker quarter-over-quarter and is unchanged year-over-year.



The Utilities sector joined the survey in Q2 2002.

# Global Employment Outlook

Americas	Net Employment Outlook			Qtr on Qtr Change	Yr on Yr Change
	Quarter 2 2009	Quarter 1 2010	Quarter 2 2010	Q1 2010 to Q2 2010	Q2 2009 to Q2 2010
	%	%	%		
Argentina	-1	12	18	6	19
Brazil	-	31	38	7	-
Canada	6 (1) <sup>1</sup>	2 (10) <sup>1</sup>	11 (7) <sup>1</sup>	9 (-3) <sup>1</sup>	5 (6) <sup>1</sup>
Colombia	11	9	16	7	5
Costa Rica	3	20	23	3	20
Guatemala	-1	12	11	-1	12
Mexico	-6 (-3) <sup>1</sup>	6 (6) <sup>1</sup>	14 (10) <sup>1</sup>	8 (4) <sup>1</sup>	20 (13) <sup>1</sup>
Panama	-	-	15	-	-
Peru	6 (11) <sup>1</sup>	19 (15) <sup>1</sup>	25 (23) <sup>1</sup>	6 (8) <sup>1</sup>	19 (12) <sup>1</sup>
United States	1 (-2) <sup>1</sup>	0 (6) <sup>1</sup>	8 (5) <sup>1</sup>	8 (-1) <sup>1</sup>	7 (7) <sup>1</sup>

Asia Pacific	Net Employment Outlook			Qtr on Qtr Change	Yr on Yr Change
	Quarter 2 2009	Quarter 1 2010	Quarter 2 2010	Q1 2010 to Q2 2010	Q2 2009 to Q2 2010
	%	%	%		
Australia	1 (-1) <sup>1</sup>	19 (20) <sup>1</sup>	24 (22) <sup>1</sup>	5 (2) <sup>1</sup>	23 (23) <sup>1</sup>
China	3 (0) <sup>1</sup>	14 (14) <sup>1</sup>	17 (14) <sup>1</sup>	3 (0) <sup>1</sup>	14 (14) <sup>1</sup>
Hong Kong	-3 (-3) <sup>1</sup>	13 (14) <sup>1</sup>	15 (15) <sup>1</sup>	2 (1) <sup>1</sup>	18 (18) <sup>1</sup>
India	19 (23) <sup>1</sup>	36 (35) <sup>1</sup>	36 (39) <sup>1</sup>	0 (4) <sup>1</sup>	17 (16) <sup>1</sup>
Japan	12 (-1) <sup>1</sup>	-4 (-1) <sup>1</sup>	13 (-1) <sup>1</sup>	17 (0) <sup>1</sup>	1 (0) <sup>1</sup>
New Zealand	-9 (-12) <sup>1</sup>	14 (13) <sup>1</sup>	17 (14) <sup>1</sup>	3 (1) <sup>1</sup>	26 (26) <sup>1</sup>
Singapore	-43 (-47) <sup>1</sup>	22 (25) <sup>1</sup>	24 (20) <sup>1</sup>	2 (-5) <sup>1</sup>	67 (67) <sup>1</sup>
Taiwan	-5 (-6) <sup>1</sup>	22 (27) <sup>1</sup>	35 (33) <sup>1</sup>	13 (6) <sup>1</sup>	40 (39) <sup>1</sup>

EMEA*	Net Employment Outlook			Qtr on Qtr Change	Yr on Yr Change
	Quarter 2 2009	Quarter 1 2010	Quarter 2 2010	Q1 2010 to Q2 2010	Q2 2009 to Q2 2010
	%	%	%		
Austria	4 (1) <sup>1</sup>	-1 (3) <sup>1</sup>	4 (1) <sup>1</sup>	5 (-2) <sup>1</sup>	0 (0) <sup>1</sup>
Belgium	0 (0) <sup>1</sup>	-4 (-3) <sup>1</sup>	3 (3) <sup>1</sup>	7 (6) <sup>1</sup>	3 (3) <sup>1</sup>
Czech Republic	-2	-6	-5	1	-3
France	-2 (-2) <sup>1</sup>	0 (0) <sup>1</sup>	1 (1) <sup>1</sup>	1 (1) <sup>1</sup>	3 (3) <sup>1</sup>
Germany	2 (0) <sup>1</sup>	1 (4) <sup>1</sup>	3 (1) <sup>1</sup>	2 (-3) <sup>1</sup>	1 (1) <sup>1</sup>
Greece	0	1	0	-1	0
Hungary	-	-7	-3	4	-
Ireland	-14 (-15) <sup>1</sup>	-13 (-11) <sup>1</sup>	-8 (-9) <sup>1</sup>	5 (2) <sup>1</sup>	6 (6) <sup>1</sup>
Italy	-5 (-6) <sup>1</sup>	-8 (-6) <sup>1</sup>	-10 (-11) <sup>1</sup>	-2 (-5) <sup>1</sup>	-5 (-5) <sup>1</sup>
Netherlands	4 (3) <sup>1</sup>	-3 (-3) <sup>1</sup>	-2 (-1) <sup>1</sup>	1 (2) <sup>1</sup>	-6 (-4) <sup>1</sup>
Norway	2 (3) <sup>1</sup>	5 (6) <sup>1</sup>	4 (6) <sup>1</sup>	-1 (0) <sup>1</sup>	2 (3) <sup>1</sup>
Poland	6	4	13	9	7
Romania	-4	-11	-7	4	-3
South Africa	14	13	8	-5	-6
Spain	-9 (-11) <sup>1</sup>	-12 (-11) <sup>1</sup>	-9 (-11) <sup>1</sup>	3 (0) <sup>1</sup>	0 (0) <sup>1</sup>
Sweden	-3 (-5) <sup>1</sup>	2 (6) <sup>1</sup>	8 (6) <sup>1</sup>	6 (0) <sup>1</sup>	11 (11) <sup>1</sup>
Switzerland	5 (3) <sup>1</sup>	4 (1) <sup>1</sup>	5 (1) <sup>1</sup>	1 (0) <sup>1</sup>	0 (-2) <sup>1</sup>
<b>UK</b>	<b>-6 (-6)<sup>1</sup></b>	<b>-1 (1)<sup>1</sup></b>	<b>1 (1)<sup>1</sup></b>	<b>2 (0)<sup>1</sup></b>	<b>7 (7)<sup>1</sup></b>

\*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.

Over 61,000 employers across 36 countries and territories have been interviewed to measure anticipated employment trends\* between April and June 2010.

All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of June 2010 as compared to the current quarter?”

Manpower surveyed employers in Panama for the first time this quarter, expanding the reach of the Manpower Employment Outlook Survey to 10 countries throughout the Americas and to 36 countries and territories worldwide.

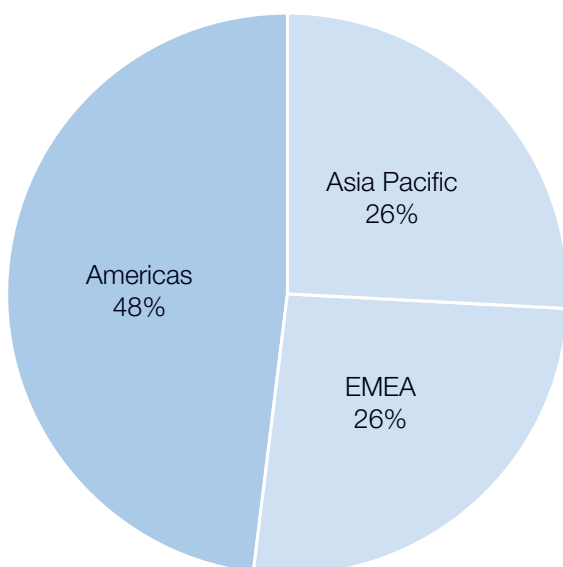
Employers in 27 of the 36 countries and territories Manpower surveys expect to add to their workforces in Quarter 2 2010. Hiring activity in the Europe, Middle East & Africa (EMEA) region is mixed, with employers in 10 of the 18 countries forecasting positive outlooks. However, forecasts throughout the Asia Pacific and Americas regions are mostly positive, with only Japanese employers anticipating negative hiring activity in the next three months. In quarter-over-quarter comparisons, Outlooks improve in 19 of 35 countries and territories. Hiring expectations are also stronger in 23 of the 33 countries and territories where year-over-year comparisons can be made.

Employment forecasts are most favourable in India, Brazil, Taiwan, Costa Rica, Peru and Australia. Conversely, employer hiring expectations are weakest in Italy, Spain and Ireland.

Regionally, employers across the 10 countries in the Americas report positive Net Employment Outlooks, with only employers in Canada, Guatemala and the United States reporting weaker forecasts compared to Quarter 1 2010. Employers in Brazil, Costa Rica and Peru continue to report the strongest hiring plans in the region. Job prospects in the U.S. are the weakest in the region. Labour market strength in the Asia Pacific region is expected to be similar to that seen prior to the global downturn, with employers in India reporting the most optimistic hiring plans globally. In the EMEA region, modest opportunities will be available for job seekers in most of the countries surveyed. The notable exceptions are Italy and Spain where employers report the least optimistic global hiring plans.

\* Commentary is based on seasonally adjusted data where available.

## Survey Respondents by Region



Research for the Quarter 2 2010 Manpower Employment Outlook Survey involved surveying over 61,000 human resource directors and senior hiring managers from public and private organisations worldwide. 48% of the respondents came from ten countries in the Americas; 26% from eight countries and territories across Asia Pacific; and 26% from 18 countries in EMEA.

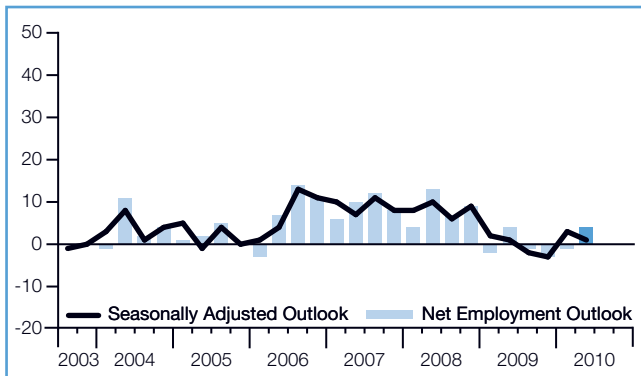
# International Comparisons – EMEA

Interviews with nearly 16,000 employers across 18 countries were conducted to measure anticipated employment trends across the Europe, Middle East and Africa (EMEA) region for Quarter 2 2010.

Hiring expectations are mixed: employers in ten countries report positive hiring activity for the quarter ahead, and most employers say they intend to keep hiring at or above the same pace compared to Quarter 1 2010. Compared to three months ago, the pace of hiring is expected to improve in eight countries. Outlooks also improve in eight countries where year-over-year comparisons can be made. Hiring activity in the region is expected to be strongest in Poland, South Africa, Norway and Sweden, and weakest in Italy and Spain.

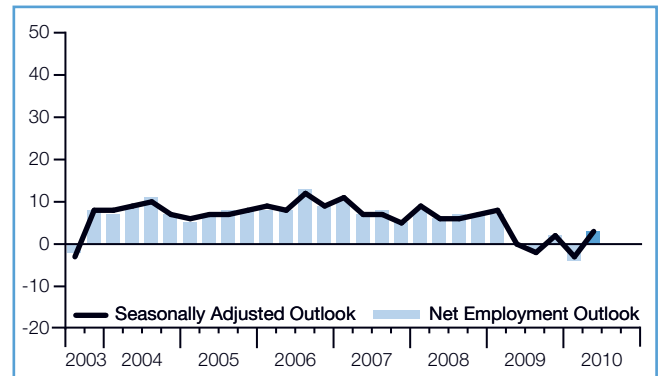
Hiring expectations among employers in Europe's Manufacturing industry sector have improved from last quarter in 11 countries, most notably in Poland where 25 per cent of employers say they will add to their payrolls. Conversely, German job seekers can expect fewer opportunities in the quarter ahead, particularly in the Construction industry sector where 16 per cent of employers indicate they will cut staff in the next three months.

## Austria



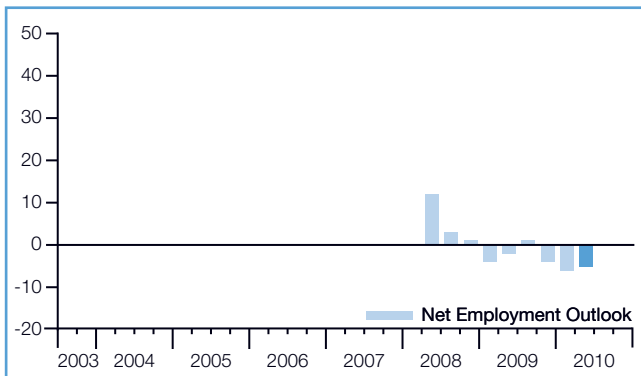
No bar indicates Net Employment Outlook of zero.

## Belgium



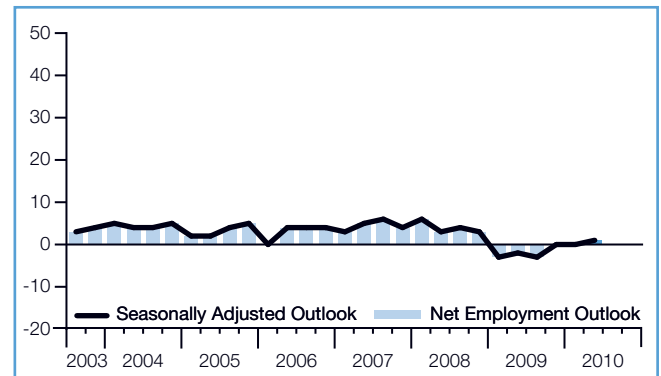
No bar indicates Net Employment Outlook of zero.

## Czech Republic



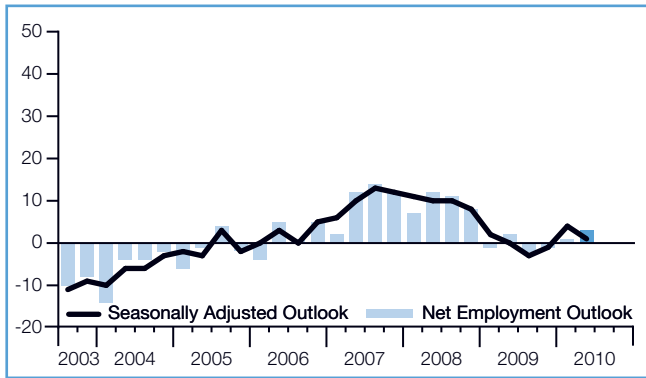
Czech Republic joined the survey in Q2 2008.

## France

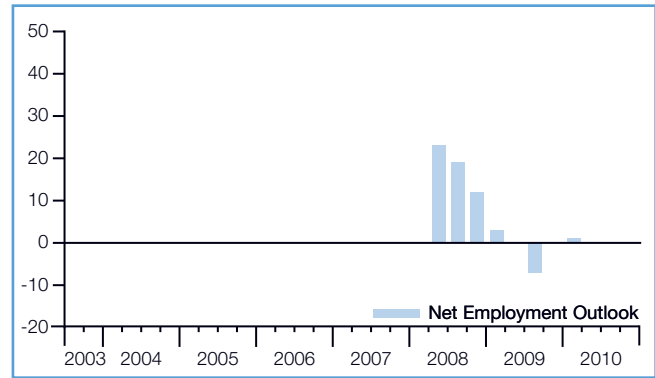


No bar indicates Net Employment Outlook of zero.

Germany

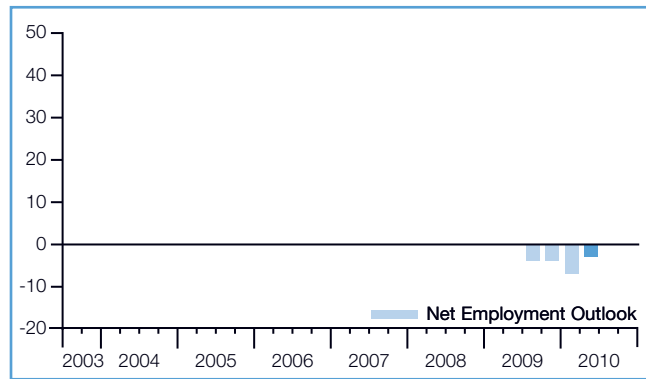


Greece



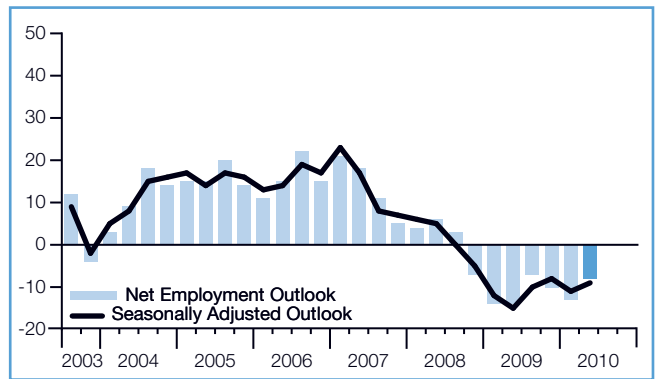
Greece joined the survey in Q2 2008.  
No bar indicates Net Employment Outlook of zero.

Hungary

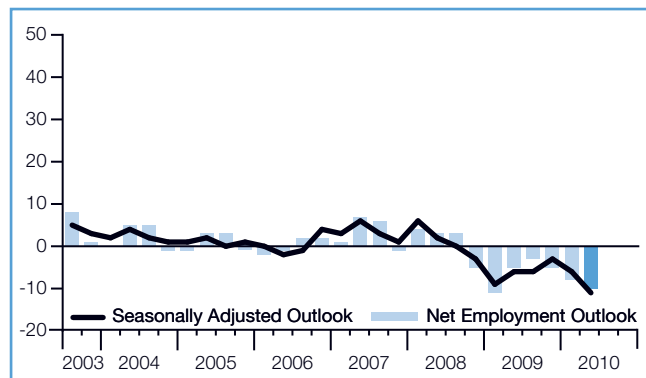


Hungary joined the survey in Q3 2009.

Ireland

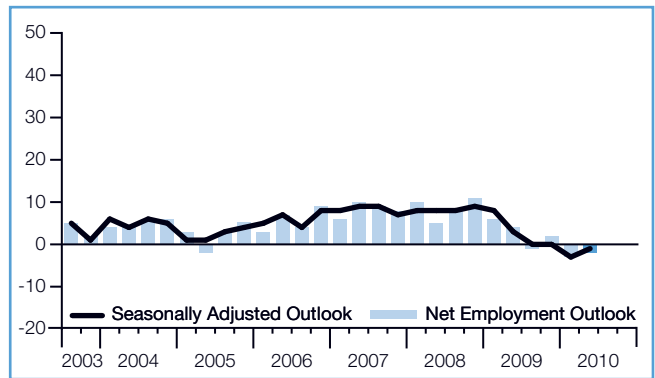


Italy

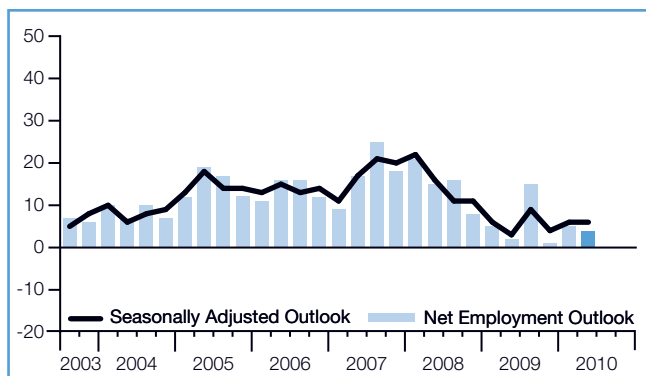


No bar indicates Net Employment Outlook of zero.

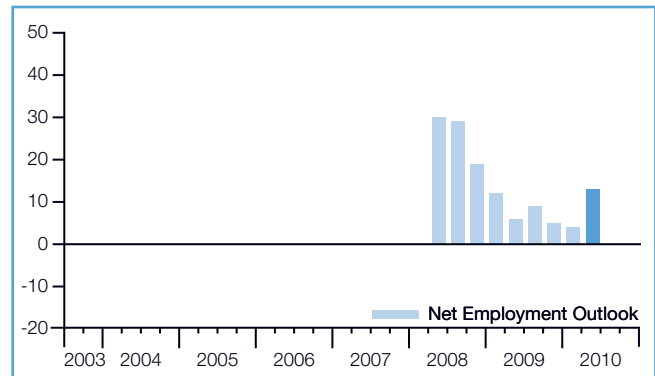
Netherlands



Norway

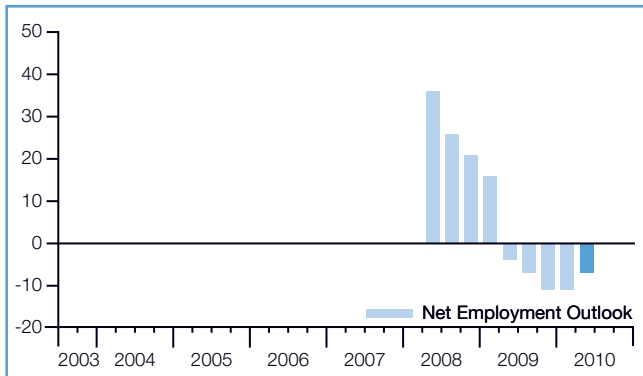


Poland



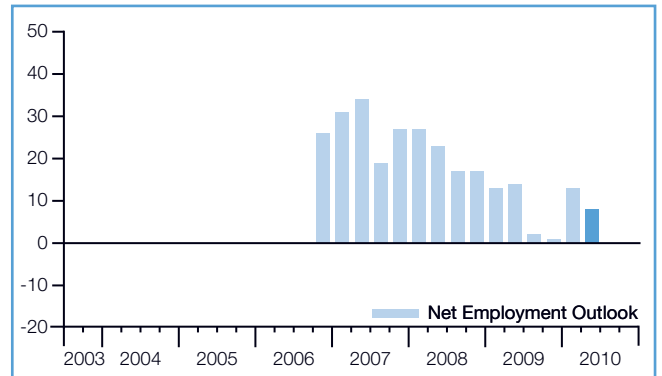
Poland joined the survey in Q2 2008.

## Romania



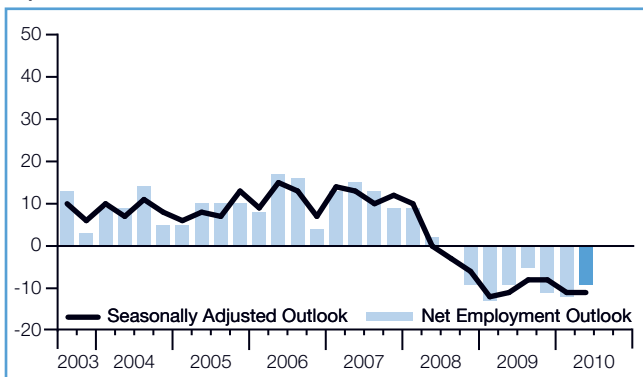
Romania joined the survey in Q2 2008.

## South Africa



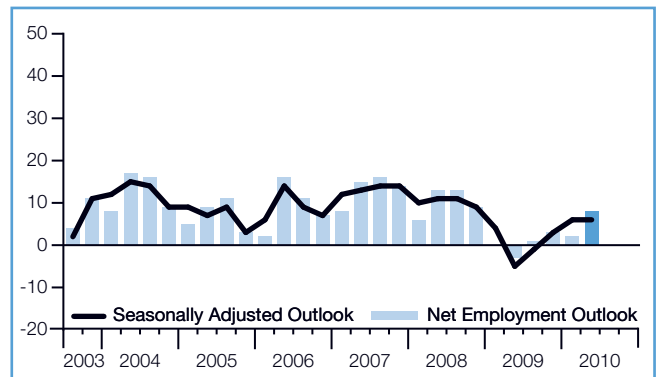
South Africa joined the survey in Q4 2006.

## Spain



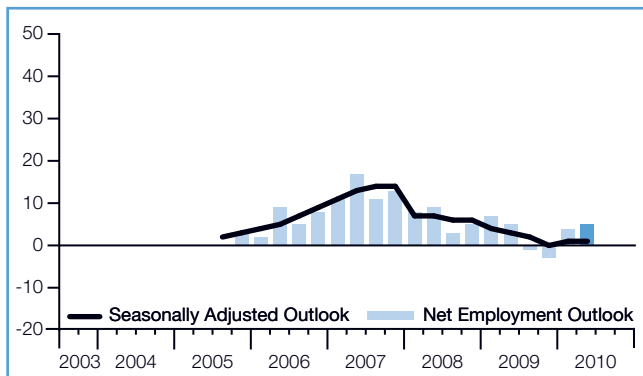
No bar indicates Net Employment Outlook of zero.

## Sweden



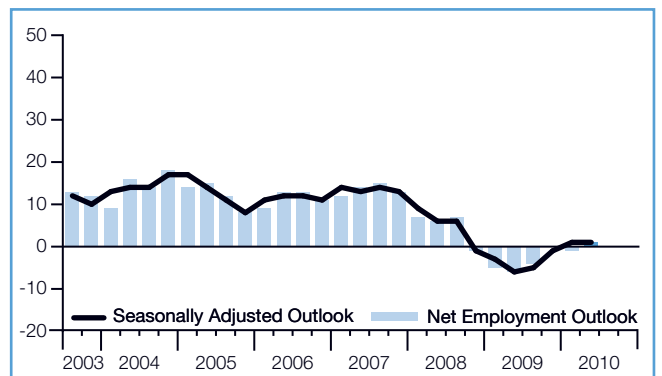
No bar indicates Net Employment Outlook of zero.

## Switzerland



Switzerland joined the survey in Q3 2005.  
No bar indicates Net Employment Outlook of zero.

## UK



No bar indicates Net Employment Outlook of zero.

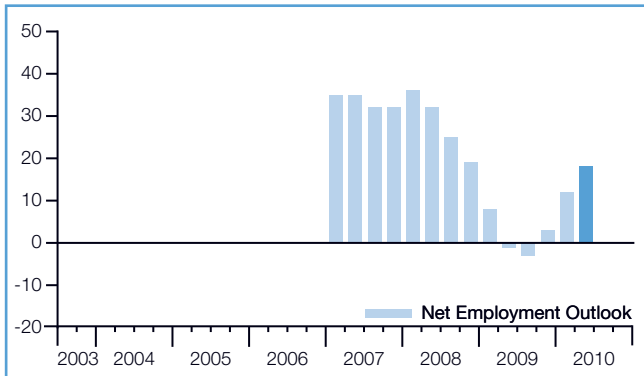
## International Comparisons – Americas

Nearly 30,000 interviews were conducted across the Americas region to measure anticipated hiring activity between April and June 2010.

The Net Employment Outlook continues to slowly improve in most of the countries surveyed in the Americas region. Hiring plans are stronger in comparison to one year ago in all countries where year-over-year data is available, and stronger in six countries quarter-over-quarter. Regional hiring plans are strongest in Brazil, Costa Rica and Peru. Meanwhile, hiring expectations are weakest among U.S. employers, although the national Outlook remains relatively stable from three months ago and is moderately stronger than that reported in the second quarter of 2009.

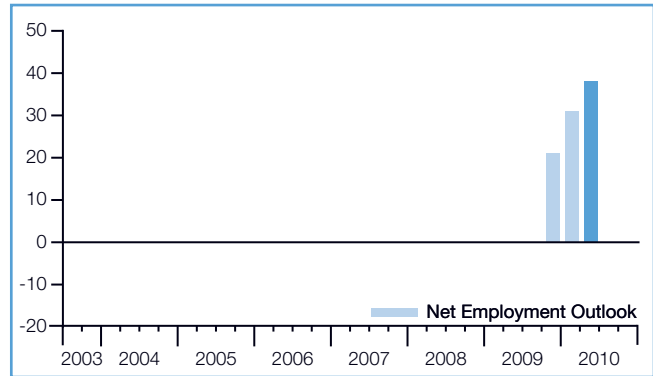
Optimism in Brazil is driven by strength in the Finance, Insurance & Real Estate and Construction industry sectors. In fact, half of all Brazilian Construction sector employers surveyed intended to add to their payrolls in the forthcoming quarter. Meanwhile, demand in Mexico's Mining & Extraction industry sector – where 30 per cent of employers say they will add staff – is bolstering the country's Outlook.

### Argentina



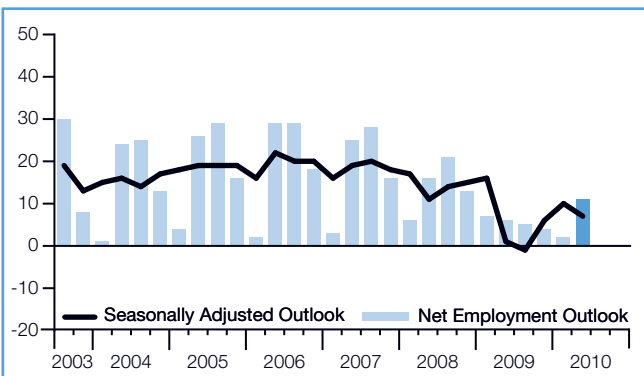
Argentina joined the survey in Q1 2007.

### Brazil

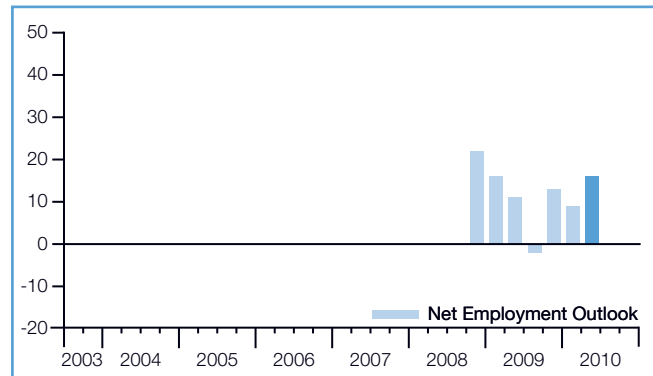


Brazil joined the survey in Q4 2009.

### Canada

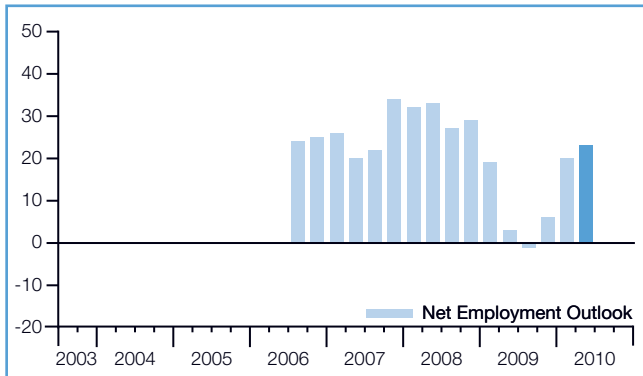


### Colombia



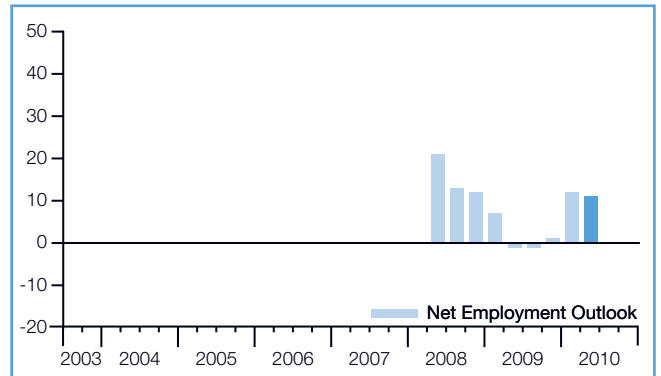
Colombia joined the survey in Q4 2008.

## Costa Rica



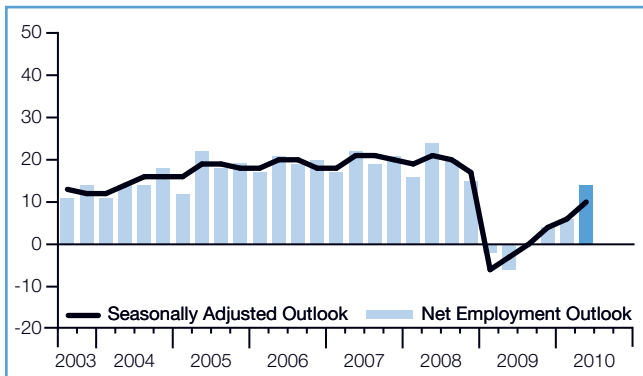
Costa Rica joined the survey in Q3 2006.

## Guatemala



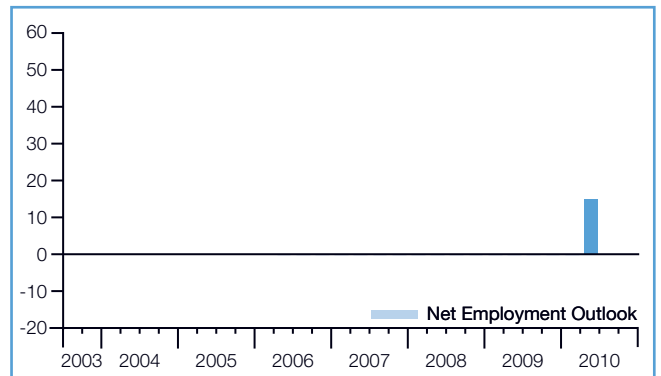
Guatemala joined the survey in Q2 2008.

## Mexico



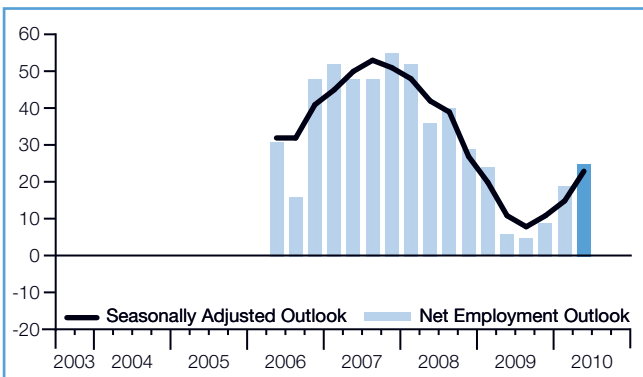
No bar indicates Net Employment Outlook of zero.

## Panama



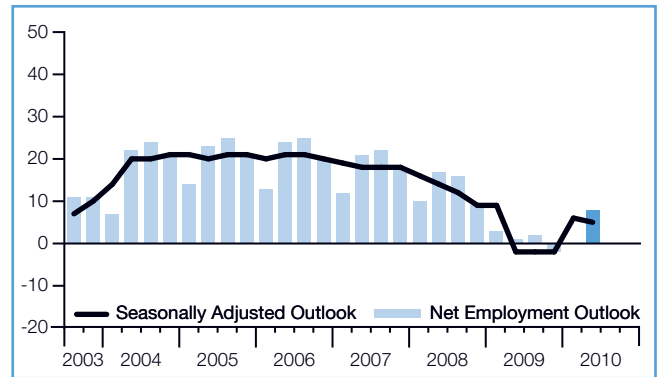
Panama joined the survey in Q2 2010.

## Peru



Peru joined the survey in Q2 2006.

## USA



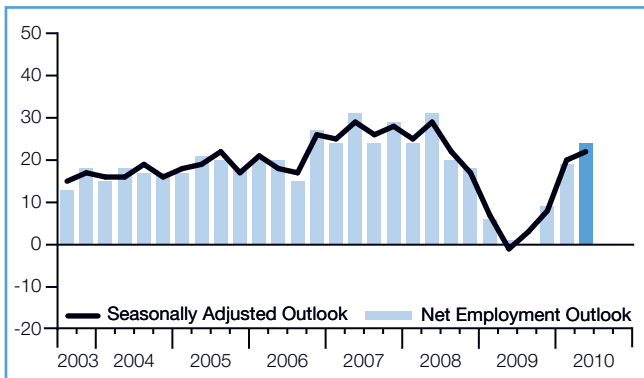
No bar indicates Net Employment Outlook of zero.

## International Comparisons – Asia Pacific

Nearly 16,000 interviews have been conducted across the Asia Pacific region to measure anticipated hiring activity between April and June 2010. Hiring plans are strongest in India, Taiwan, Australia and Singapore. As they did in Quarter 1 2010, Japanese employers are reporting the region's weakest – and only negative – Outlook. Employer optimism increased quarter-over-quarter in five of the eight countries and territories surveyed. Year-over-year comparisons also reveal considerably stronger hiring plans in all countries and territories except Japan.

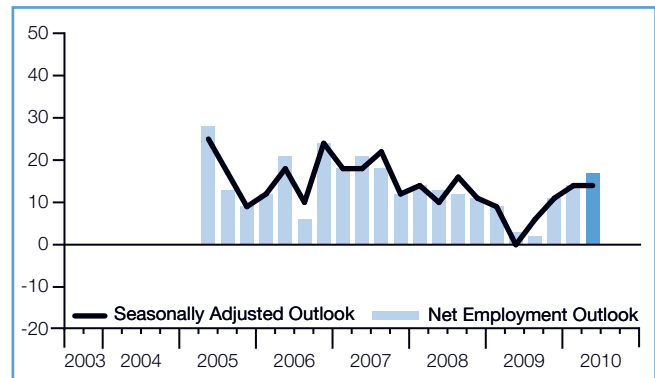
The hiring pace is expected to remain brisk in India, boosted by employer confidence in the Services and the Finance, Insurance & Real Estate industry sectors. Elsewhere, employers in Taiwan report their strongest hiring plans since the Manpower survey began there in 2005. Much of the Taiwanese optimism is being fuelled by strong demand in the Finance, Insurance & Real Estate industry sector where nearly half of all employers surveyed anticipate adding to their staff in the second quarter. Meanwhile, despite the seasonal boost that normally occurs in the second quarter in Japan, opportunities for job seekers are likely to remain stable in comparison to last quarter and Quarter 2 2009.

### Australia



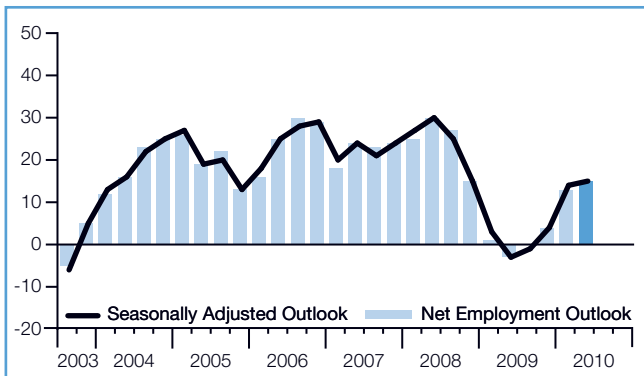
No bar indicates Net Employment Outlook of zero.

### China



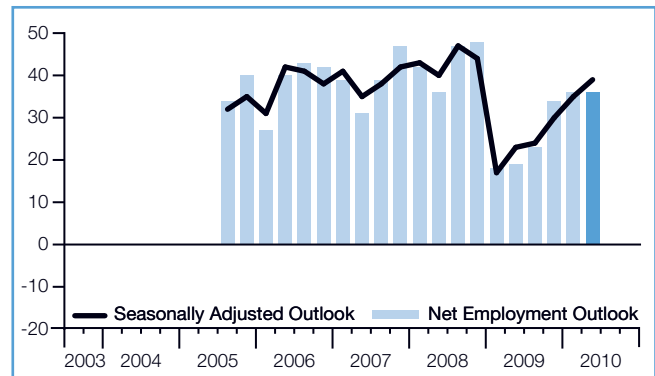
China joined the survey in Q2 2005.

### Hong Kong



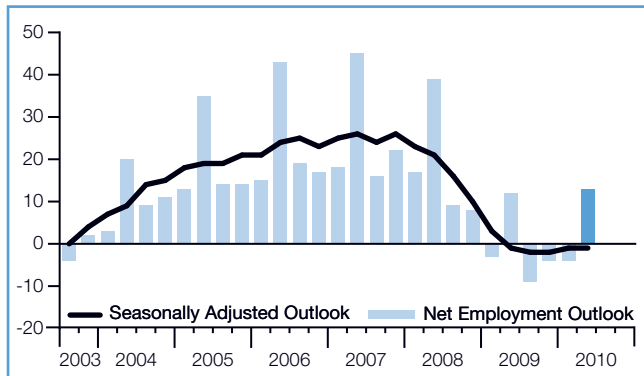
No bar indicates Net Employment Outlook of zero.

### India

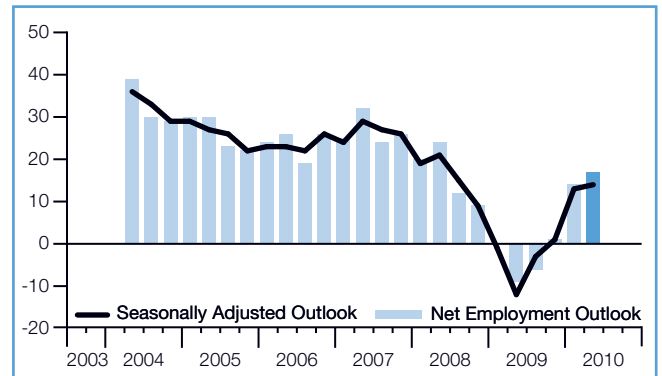


India joined the survey in Q3 2005.

## Japan

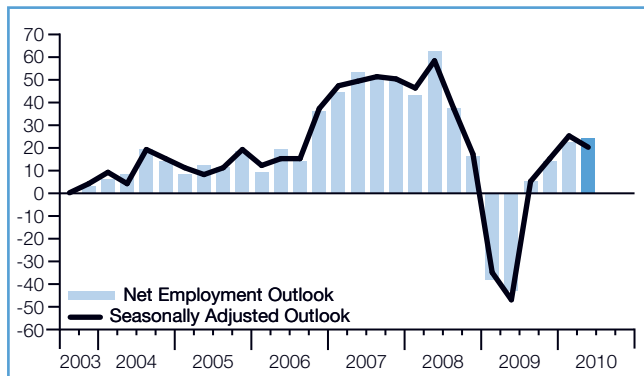


## New Zealand



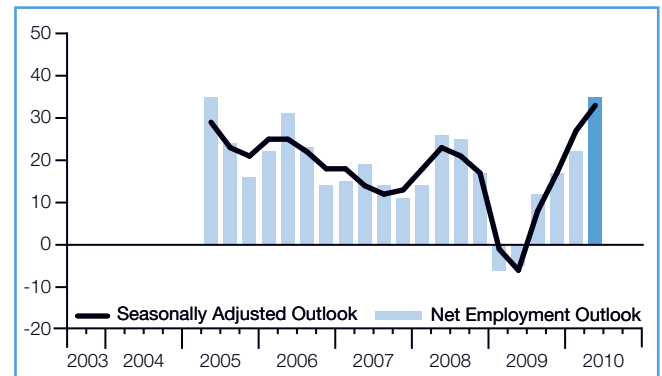
New Zealand joined the survey in Q2 2004.  
No bar indicates Net Employment Outlook of zero.

## Singapore



No bar indicates Net Employment Outlook of zero.

## Taiwan



Taiwan joined the survey in Q2 2005.

## About the Survey

The Manpower 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. The survey has been running for more than 47 years and is one of the most trusted surveys of employment activity in the world. Various factors underpin the success of the Manpower Employment Outlook Survey:

**Unique:** It is unparalleled in its size, scope, longevity and area of focus.

**Projective:** The Manpower 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 in which it is conducted. The survey participants are not derived from Manpower's customer base.

**Robust:** The survey is based on interviews with over 61,000 public and private employers across 36 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 four decades, the survey has derived all of its information from a single question.

## Survey Question

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 2010 as compared to the current quarter?"

## Methodology

The Manpower Employment Outlook Survey is conducted using a validated methodology, in accordance with the highest standards in market research. The research team for the 36 countries and territories where the survey is currently conducted includes Manpower's internal research team and Infocorp Ltd. The survey has been structured to be representative of each national economy.

In the UK, the national survey includes 2,102 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 that expect to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook.

## Seasonal Adjustment

Seasonal adjustments have been applied to the data for Australia, Austria, Belgium, Canada, China, France, Germany, Hong Kong, India, Ireland, Italy, Japan, Mexico, Netherlands, New Zealand, Norway, Peru, Singapore, Spain, Sweden, Switzerland, Taiwan, United Kingdom and the United States to provide additional insight into the survey data. These adjustments make it possible to review the data without the employment fluctuations that normally occur at the same time each year, thus providing a clearer picture of the data over time. Manpower intends to add seasonal adjustments to the data for other countries in the future, as more historical data is compiled. Note that in Quarter 2 2008, Manpower adopted the TRAMO-SEATS method of seasonal adjustment for data.

## About Manpower Inc.

### History of the Survey

- 1962** First generation of the Manpower Employment Outlook Survey launched in the United States and Canada.
- 1966** Manpower's United Kingdom operation launches the equivalent of the United States survey, naming the report the Quarterly Survey of Employment Prospects. The survey adopts the same forward-looking research format as the United States survey and is the first of its kind in Europe.
- 1976** Second generation of the Manpower Employment Outlook Survey launched in the United States and Canada. Research methodology is updated to evolve with advancements in the field of market research.
- 2002** Manpower United Kingdom's Quarterly Survey of Employment Prospects is updated to adopt an enhanced research methodology. Manpower's operations in Mexico and Ireland launch the survey in their respective countries.
- 2003** Third generation of the Manpower Employment Outlook Survey is launched, expanding the program to a total 18 countries and territories worldwide: Australia, Austria, Belgium, Canada, France, Germany, Hong Kong, Ireland, Italy, Japan, Mexico, Netherlands, Norway, Singapore, Spain, Sweden, the United Kingdom and the United States.
- 2004** Manpower operations in New Zealand launch the Manpower Employment Outlook Survey.
- 2005** Manpower operations in China, India, Switzerland and Taiwan launch the Manpower Employment Outlook Survey.
- 2006** Manpower operations in Costa Rica, Peru and South Africa join the survey program. Surveys in Australia, Austria, Belgium, France, Germany, Hong Kong, Ireland, Italy, Japan, Mexico, Netherlands, Norway, Singapore, Spain and Sweden add seasonally adjusted data in the third quarter.
- 2007** Manpower operations in Argentina launch the Manpower Employment Outlook Survey. The survey in New Zealand adds seasonally adjusted data in the first quarter.
- 2008** Manpower operations in Colombia, the Czech Republic, Greece, Guatemala, Poland and Romania join the survey program. China and Taiwan add seasonally adjusted data in the second quarter. India and Switzerland add seasonally adjusted data in the third quarter.
- 2009** Manpower operations in Hungary and Brazil launch the Manpower Employment Outlook Survey.
- 2010** Manpower's Panama operation launches the Manpower Employment Outlook Survey, expanding the programme total to 36 countries and territories worldwide. Peru adds seasonally adjusted data in the second quarter.

Manpower Inc. (NYSE: MAN) is a world leader in the employment services industry; creating and delivering services that enable its clients to win in the changing world of work. Founded in 1948, the \$16 billion company offers employers a range of services for the entire employment and business cycle including permanent, temporary and contract recruitment; employee assessment and selection; training; outplacement; outsourcing and consulting. Manpower's worldwide network of 4,000 offices in 82 countries and territories enables the company to meet the needs of its 400,000 clients per year, including small and medium size enterprises in all industry sectors, as well as the world's largest multi-national corporations. The focus of Manpower's work is on raising productivity through improved quality, efficiency and cost-reduction across their total workforce, enabling clients to concentrate on their core business activities. Manpower Inc. operates under five brands: Manpower, Manpower Professional, Elan, Jefferson Wells and Right Management. More information on Manpower Inc. is available at [www.manpower.com](http://www.manpower.com).

## About Manpower UK

Manpower is one of the largest and most innovative companies in the UK's employment services industry; creating and delivering services that enable its clients to win in the changing world of work. The company provides a wide range of services including permanent, temporary and contract recruitment; employee assessment and selection; training, outplacement, outsourcing and consulting.

Manpower was established in the UK in 1956, and today works with organisations in both the public and private sectors, ranging from small and medium size enterprises, to multi-national organisations such as BT, Hertfordshire County Council, IBM, Royal Mail and Xerox.

The focus of Manpower's work is on raising productivity through improved quality, efficiency and cost-reduction, enabling customers to concentrate on their core business. Manpower works across all industries finding people for every level of an organisation.

Manpower Professional, a division of Manpower UK, offers comprehensive, expert recruitment services in the accountancy and finance sectors, backed by award-winning training, assessment and selection.

Manpower UK has a network of over 300 offices and is a subsidiary of Manpower Inc, a worldwide network of 4,000 offices in 82 countries and territories.

For more information, see [manpower.co.uk](http://manpower.co.uk)





Manpower UK Ltd., Capital Court, Windsor Street, Uxbridge, Middlesex UB8 1AB  
Tel: 01895 205 200 Fax: 01895 205 201  
[www.manpower.co.uk](http://www.manpower.co.uk)

© 2010, Manpower Inc. All rights reserved.