

SOUTH AFRICA MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

MEOS Q1 2022



ManpowerGroup®



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.

Most in-demand roles locally: Banking, Finance, Insurance and Real Estate (+44%) reported the strongest outlook followed by Construction (34%), Education, Health, Social Work and Government (34%) and Restaurants and Hotels (+34%).

Employers know flexibility is the key to attracting workers in a tight labour market: Organisations expect 25% (of finance) and 13% (of manufacturing and production) workforce to work a hybrid mix of onsite workplace and remote.

Not all roles will be hybrid: The Manufacturing and Production industries are most likely to be in the workplace all of the time (64%) whereas roles in IT and telecoms are more likely to be full-time remote (13%).

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Q1 EMPLOYMENT OUTLOOKS:

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



“The post-pandemic hiring recovery that has been underway for some time will continue to carry momentum into 2022 with employers predicting strong demand for talent across key sectors,” said Jonas Prising, ManpowerGroup Chairman and CEO.

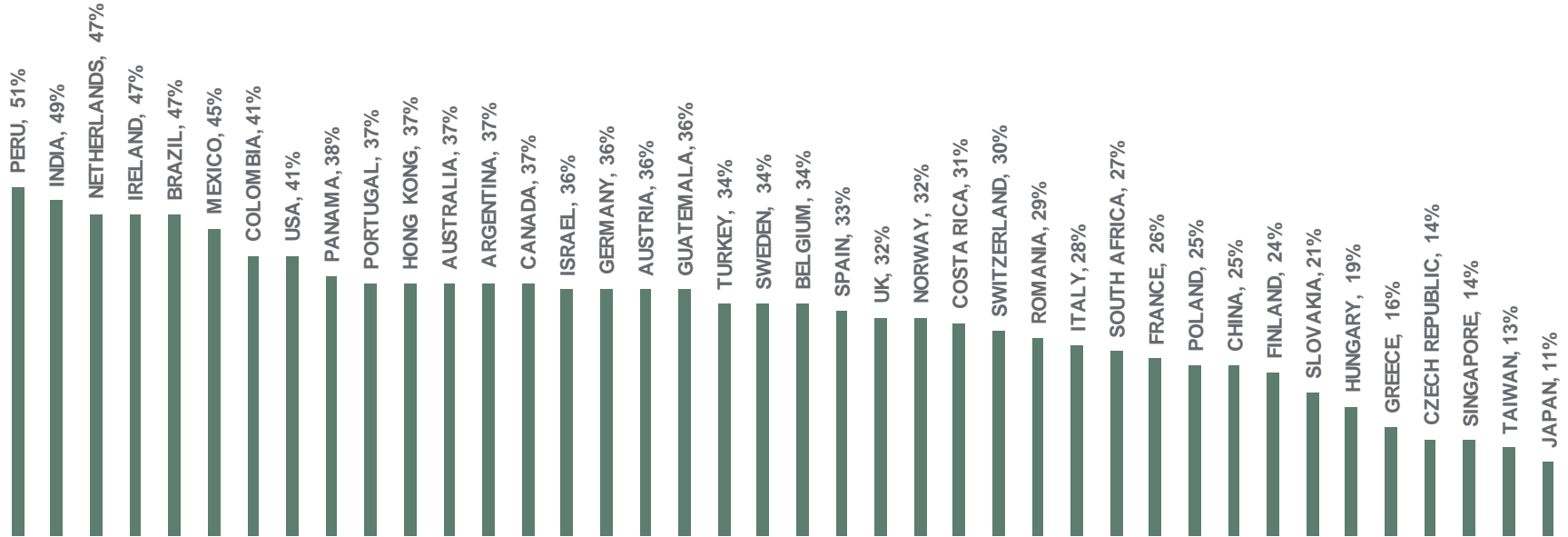
Employer Hiring Expectations for January – March 2022

In the 60th anniversary edition of the ManpowerGroup Employment Outlook Survey of 39,000 employers, 36 of the 40 countries report higher intentions than the previous quarter. Employers globally expect a robust labour 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.



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

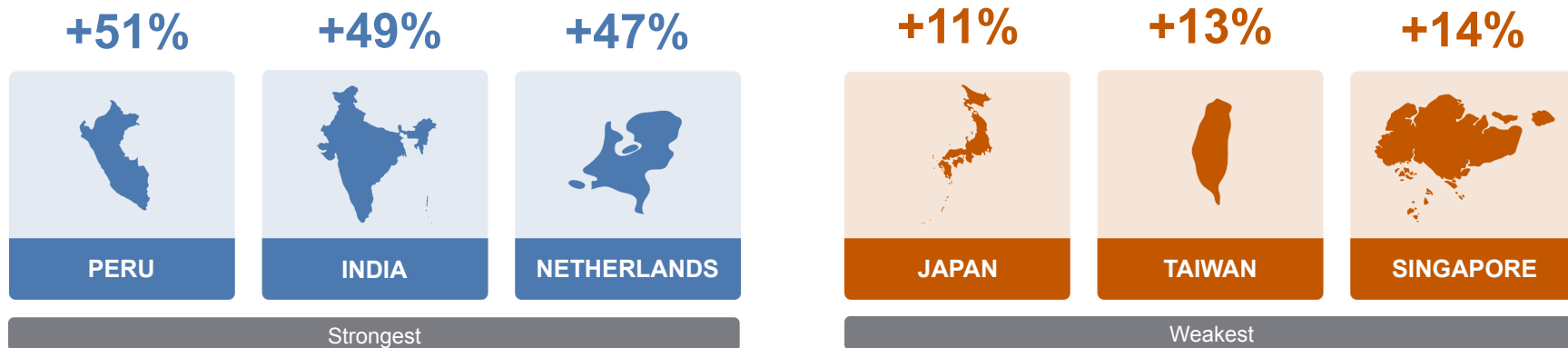
With strong outlooks across the regions, employers in North America (+41) reported the most positive outlook followed by South and Central America (+39%), APAC (+34%) and EMEA (+28%).



Employers Share Strong Optimism Across All 40 Countries Surveyed

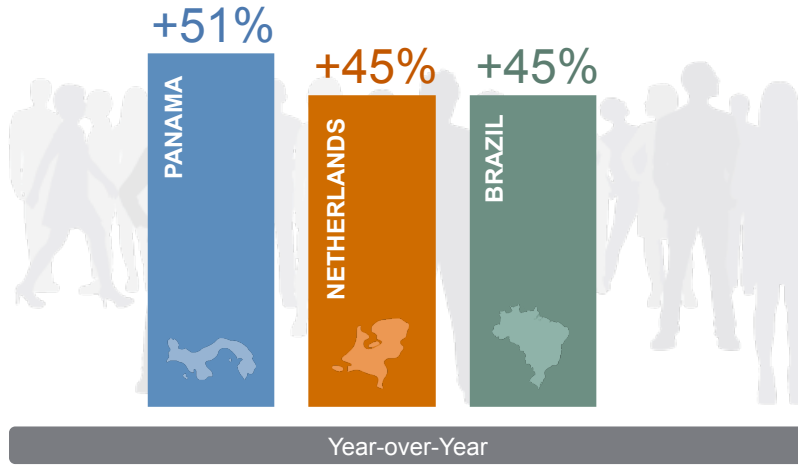
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Countries With the Strongest & Weakest Hiring Prospects for Q1 2022:

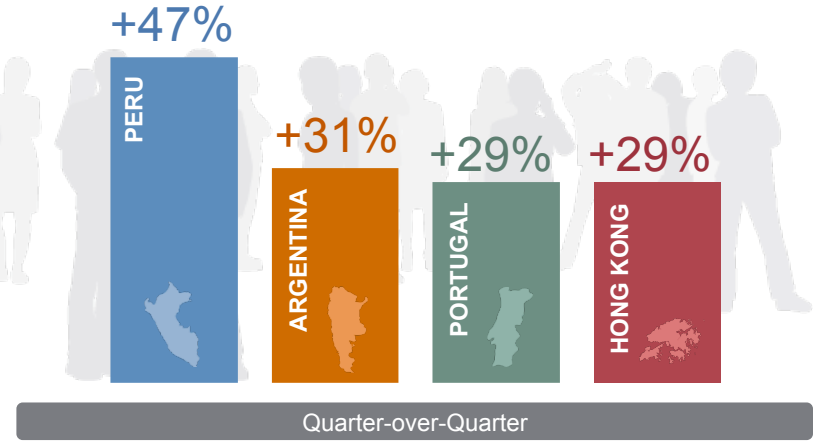


Net Positive Outlooks Optimistic Across Regions, Both YoY & QoQ

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

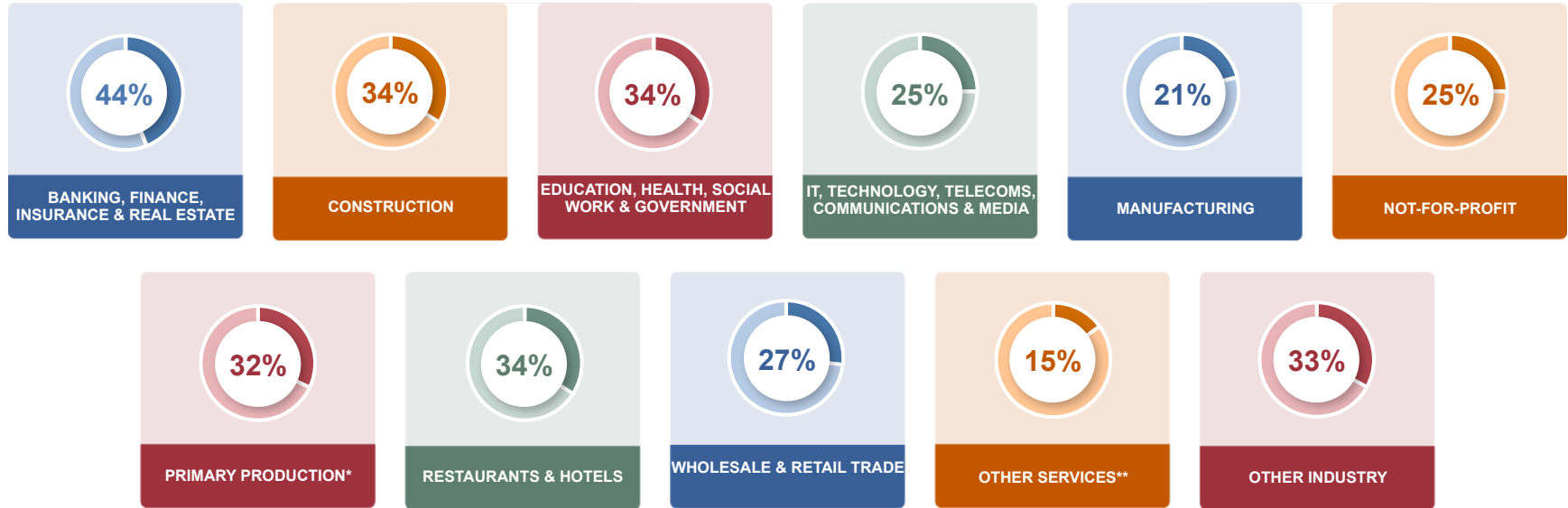


The strongest quarter-over-quarter improvements are reported in Peru (+47%), Argentina (+31%), Portugal (+29%) and Hong Kong (+29%).



Growth Expected Across All 11 Industries Locally

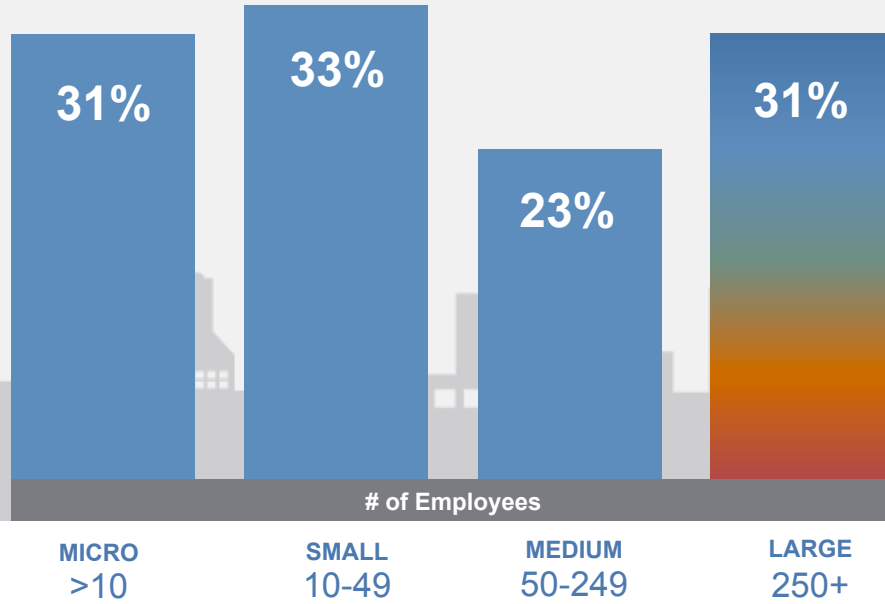
Most in-demand roles locally: Banking, Finance, Insurance and Real Estate (+44%) reported the strongest outlook followed by Construction (34%), Education, Health, Social Work and Government (34%) and Restaurants and Hotels (+34%).



*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 Organisations Report Strongest Hiring Intentions

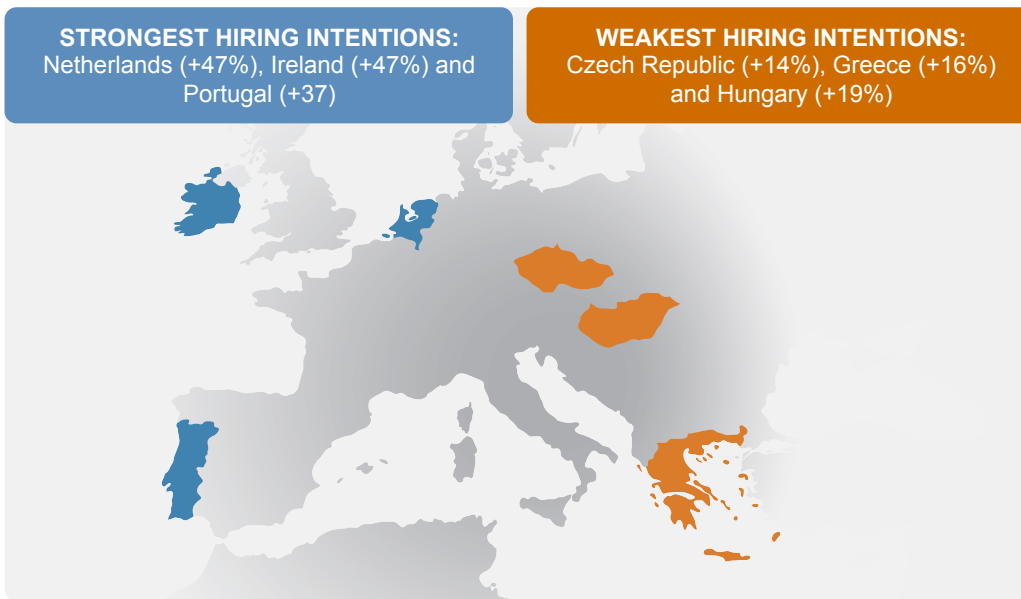


Hiring intentions in EMEA Improve in All Countries YoY For Second Consecutive Quarter

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.

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



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.

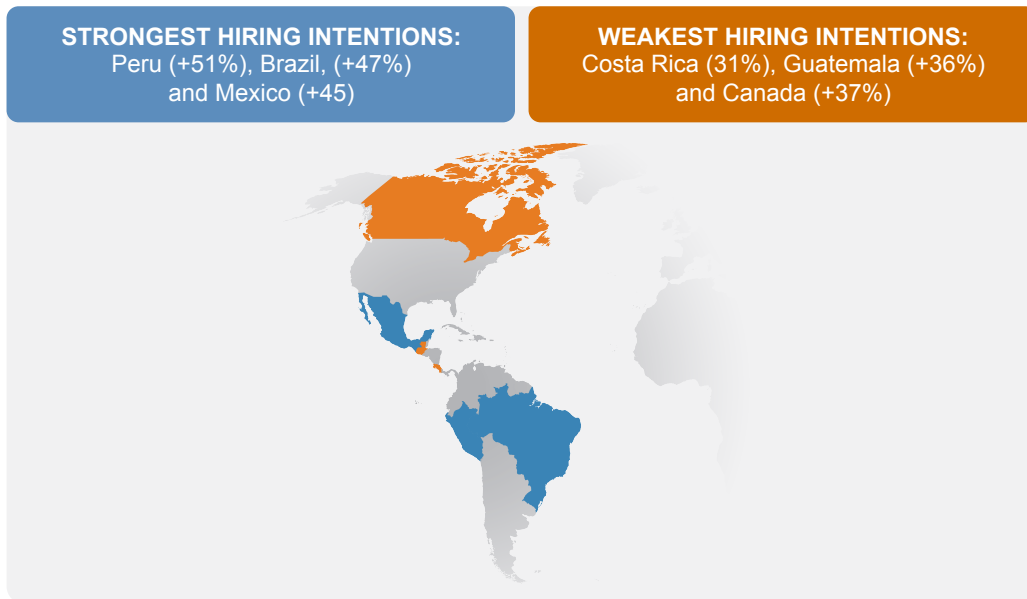
Growth is expected in all 11 industry sectors, 7 regions and company sizes with the strongest intentions in more than 13 years.

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:

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

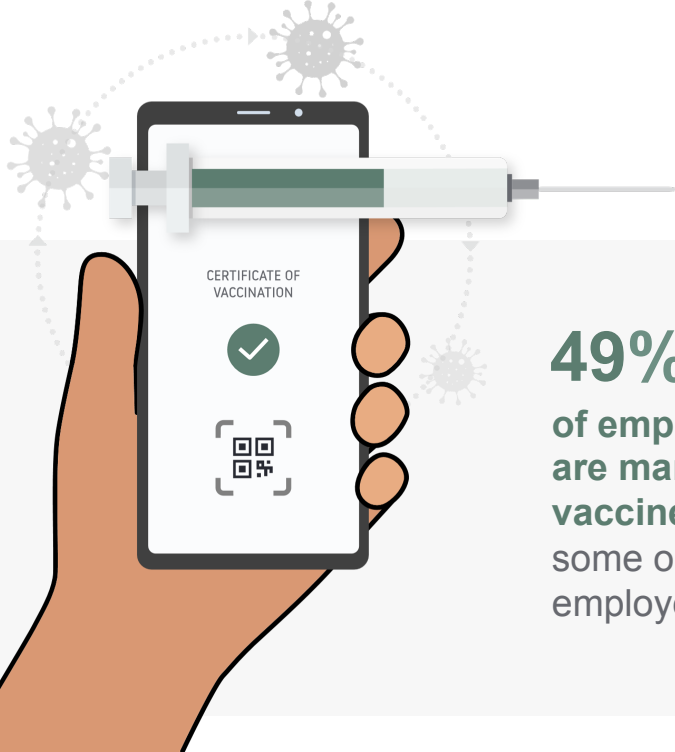


Only 17% are letting individual workers decide



VACCINE EXPECTATIONS FOR ON-SITE RETURN

Employers locally are sharing requirements for employees before they can return to the workplace:



49%
of employers
are mandating
vaccines for
some or all
employees

Mandate double
vaccination and
require proof for all
employee roles

23%

Proof of double
vaccination will be
required for some
employee roles,
but not all

14%

Plan to require
proof of double
vaccination and
booster shot

12%

Urge vaccination
by highlighting
the benefits but
not mandate

36%

Offer incentives
(e.g., cash bonus)
to encourage
vaccination

13%

Up to
individuals
to decide

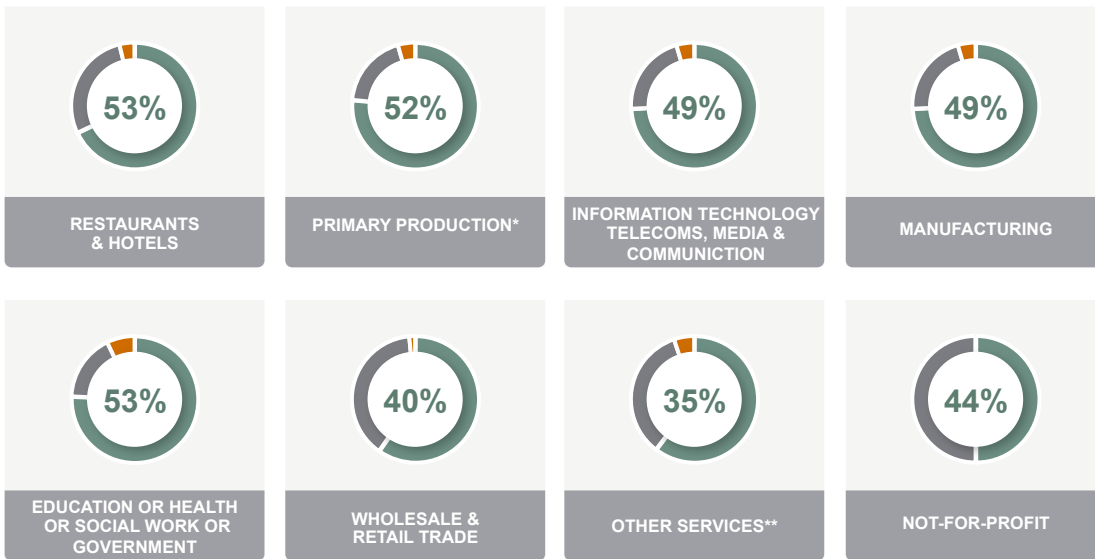
17%

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

Banking, Finance, Insurance, Real Estate, Construction, Education, Health, Social Work or Government and Restaurants and Hotels are Most Likely to Mandate Vaccines



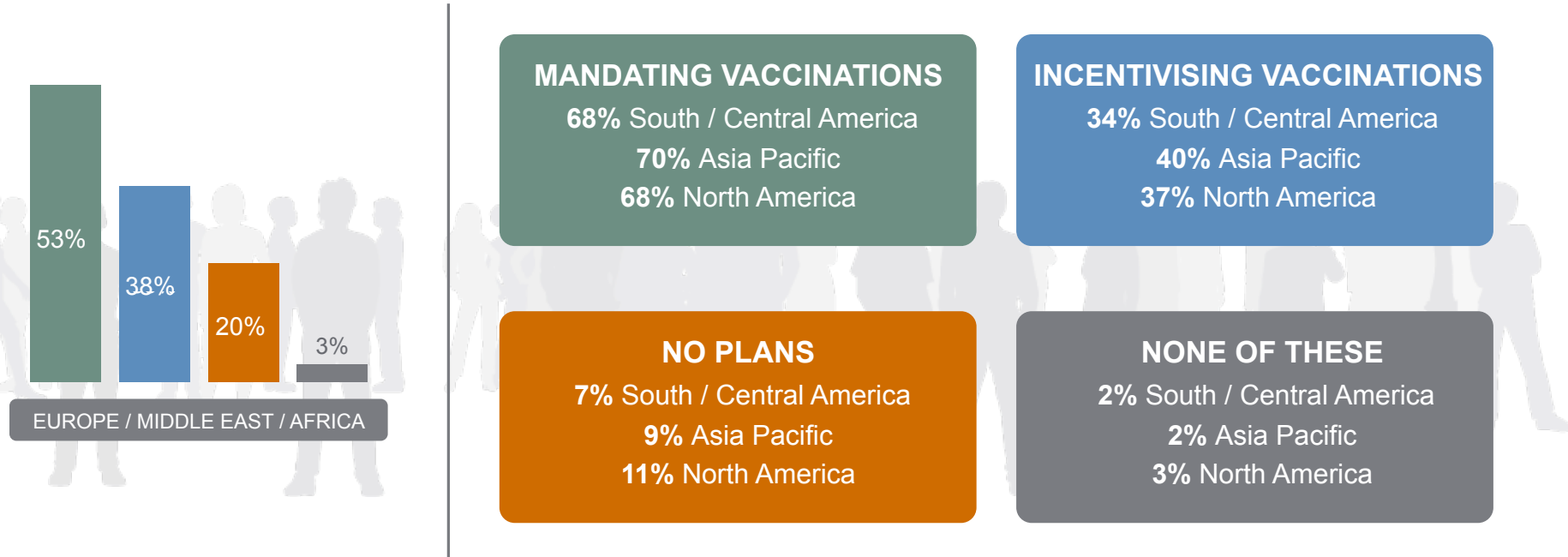
■ Mandating Vaccinations
 ■ No Plans
 ■ None of These



*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



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

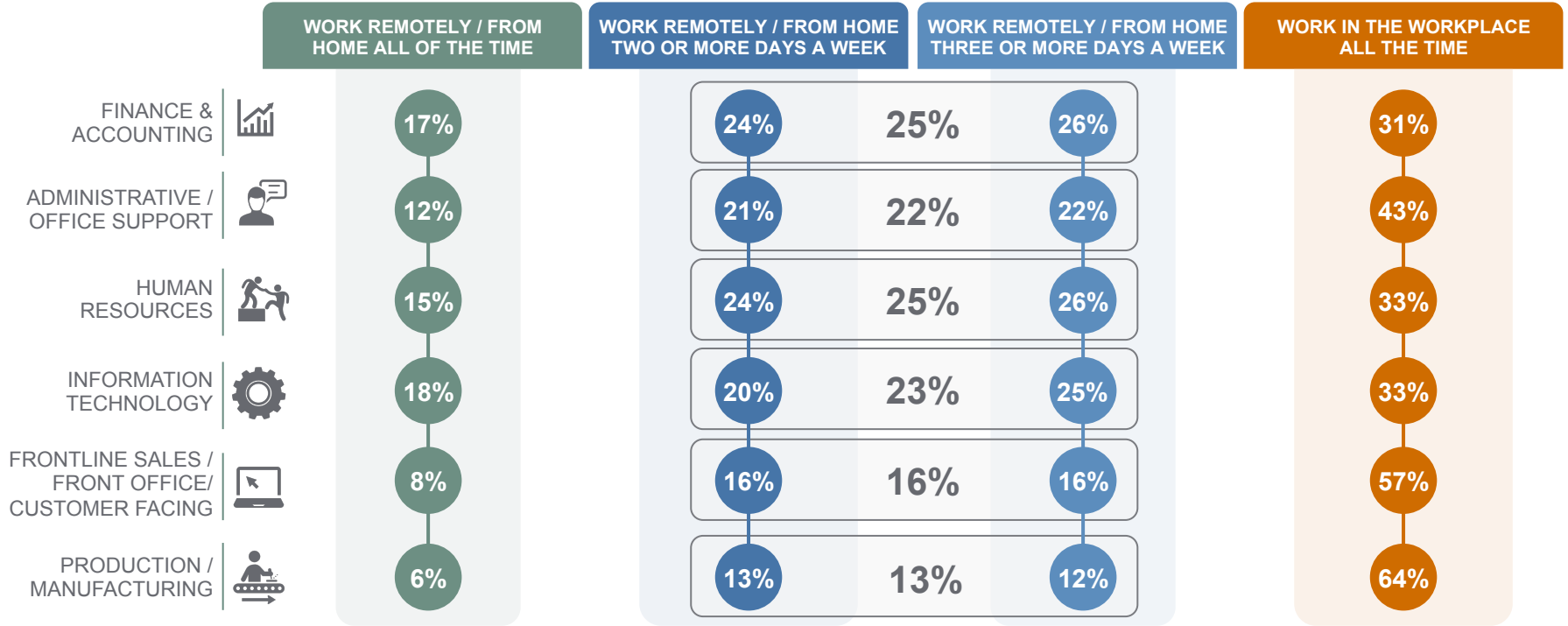


THE GREAT SHIFT TO HYBRID WORKING:

More employers are embracing
the blend of work and home



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



HYBRID MODEL

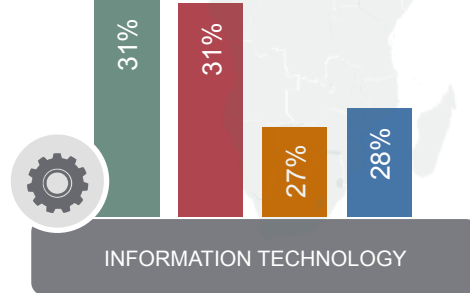
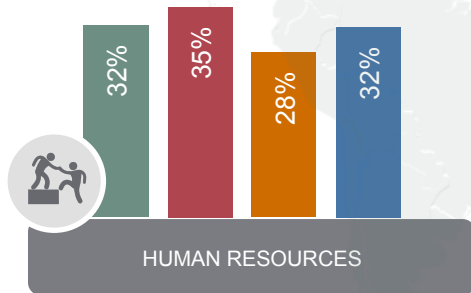
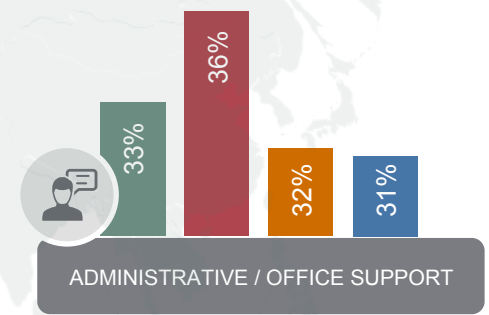
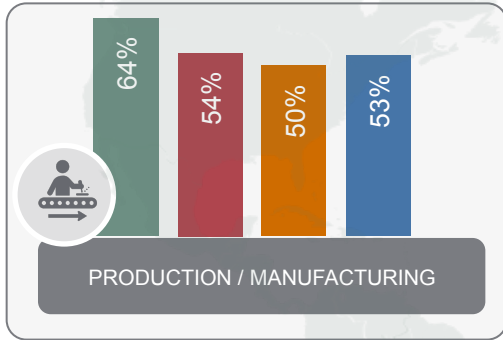
Working a mix of some days remote and some days in the workplace

*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

■ South / Central America
 ■ Asia Pacific
 ■ North America
 ■ Europe / Middle East / Africa





ABOUT THE MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY



About the 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:

Unique

It is unparalleled in its size, scope, longevity and area of focus. The ManpowerGroup Employment Outlook Survey is the most extensive, forward-looking employment survey in the world, asking employers to forecast employment over the next quarter. In contrast, other surveys and studies focus on retrospective data to report on what occurred in the past.

Independent

The survey is conducted with a representative sample of employers from throughout the countries and territories in which it is conducted. The survey participants are not derived from ManpowerGroup's customer base.

Robust

The survey is based on interviews with more than 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 digitised 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 incentivised to complete the survey. The question asked and the respondent profile remains unchanged. Size of organisation and sector are standardised across all countries to allow international comparisons.

Notes to Editors

* The methodology used to collect the data for the Employment Outlook has been digitised 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 incentivised 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 organisation and sector are standardised 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 organisation



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

Explore the [Workforce Resource Hub](#) for the latest workforce trends and insights.

ManpowerGroup Provides Solutions Across the Entire HR Life Cycle



Workforce Consulting & Analytics



Workforce Management



Talent Resourcing



Career Management



Career Transition



Attracting Top Talent

EXPLORE THE DATA