2026 Q2 | ManpowerGroup Employment Outlook Survey

APME FINDINGS →

Executive Summary

More than **13,200** employers across **11** APME countries and territories reported a seasonally adjusted Net Employment Outlook (NEO) of **38%** as they forecast **Q2** staffing changes in the latest edition of the ManpowerGroup Employment Outlook Survey.

Anticipated hiring increases are driven by **company expansion**.

Expected decreases are driven by **economic challenges**.

The Q2 2026 APME Net Employment Outlook **improved** since the **previous quarter** (+7 points) and **year-over-year** (+10 points).

Strongest NEOs
Reported for Q2 2026

68%
India

52%
Information

47%
Organizations with 5,000+ employees

Most Improved NEOs
Compared to the previous quarter

+16
India

+14
Information

+11
Organizations with 250 to 999 employees

The data for the second quarter was collected between January 1 and February 3, 2026, prior to geopolitical developments that began across the Middle East in late February. The findings reflect employer sentiment at the time of data collection and may not capture the potential impact of subsequent events.

Q2 Employer Hiring Sentiment in APME

# Capturing Future Hiring Plans

Since 1962, ManpowerGroup has asked organizations about their quarterly hiring plans.

In the latest edition of the Employment Outlook Survey, more than **41,700 employers** across **42 countries** reported **hiring expectations for Q2 2026**—including more than **13,200 employers** across **11 countries and territories in Asia Pacific and the Middle East (APME).**

Respondents shared whether their staffing levels would remain unchanged, increase through new hiring, or decrease due to layoffs or anticipated departures.

Decrease

No Change

Increase

Unsure

How will your staff size change next quarter? *
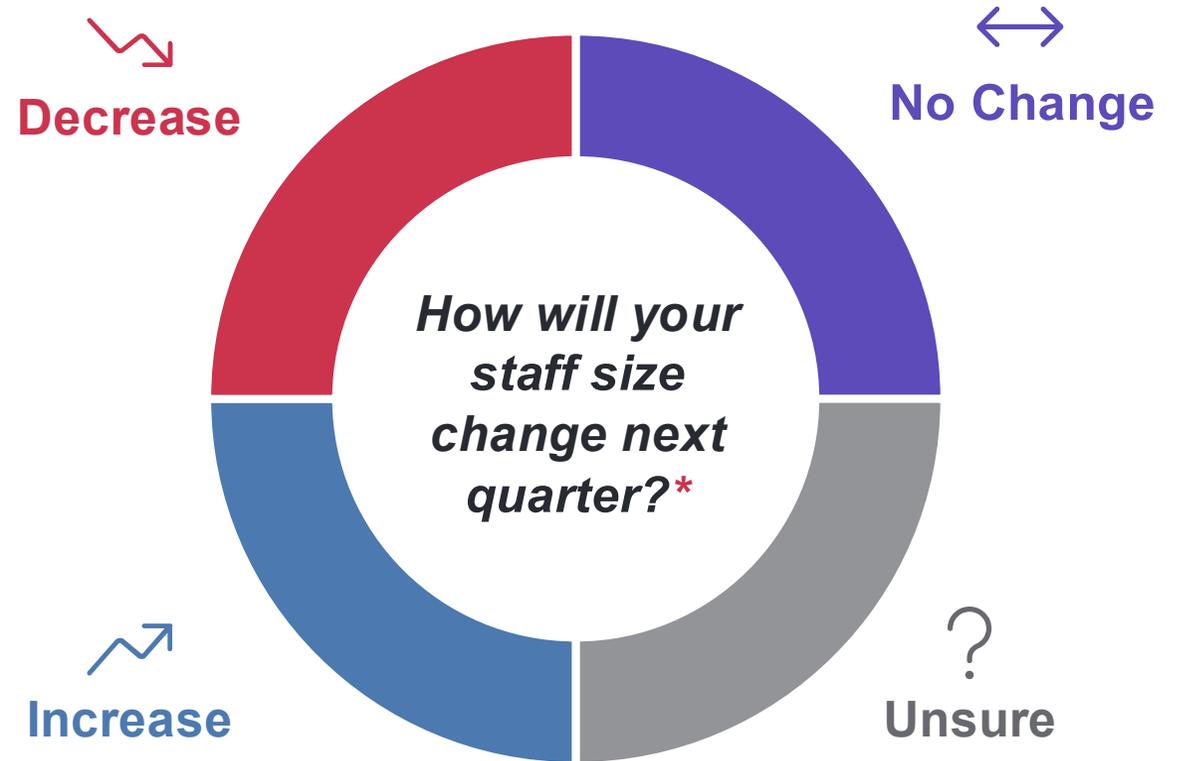
*The survey question has been modified for clarity, and the full text is available in the About the Survey section.

Employer Expectations in APME

11% of employers reported they are anticipating **staff reductions**.
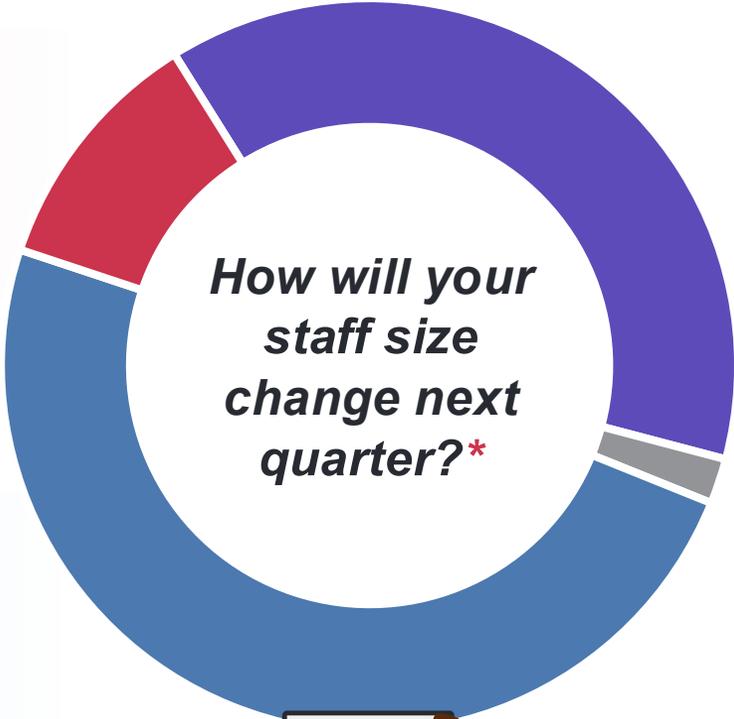
38% of employers said they planned to keep **staffing levels unchanged**.

*How will your staff size change next quarter?**

49% of employers said they planned to **increase their staff** between April and June.

2% of employers were **unsure how staffing levels would change** in the months ahead.
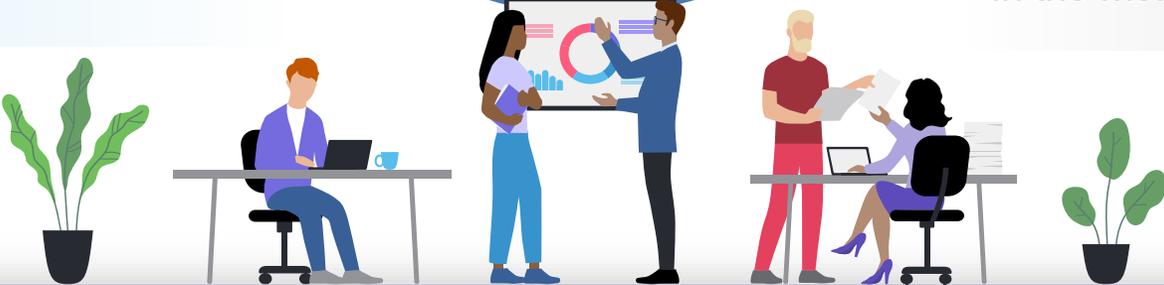
Measuring With the Net Employment Outlook

Hiring sentiment is quantified using the **Net Employment Outlook (NEO)**, defined as the difference between the percentage of employers planning to increase staff and those planning to reduce staff.

The unadjusted NEO in APME region for the second quarter of 2026 is 38%, and **remains the same** after adjusting for predictable seasonal patterns, and to more accurately compare across regions and over time. The seasonally adjusted figure is used throughout the remainder of this report unless otherwise noted.

49%
Anticipate
Staffing Increase

—

11%
Anticipate
Staffing Decrease

=

38%
Q2 2026
APME NEO*

*Net Employment Outlook results range from +100% to -100%

Changes Over Time in APME

The Q2 2026 APME Net Employment Outlook **improved since the previous quarter** (**+7 points**) and **year-over-year** (**+10 points**).
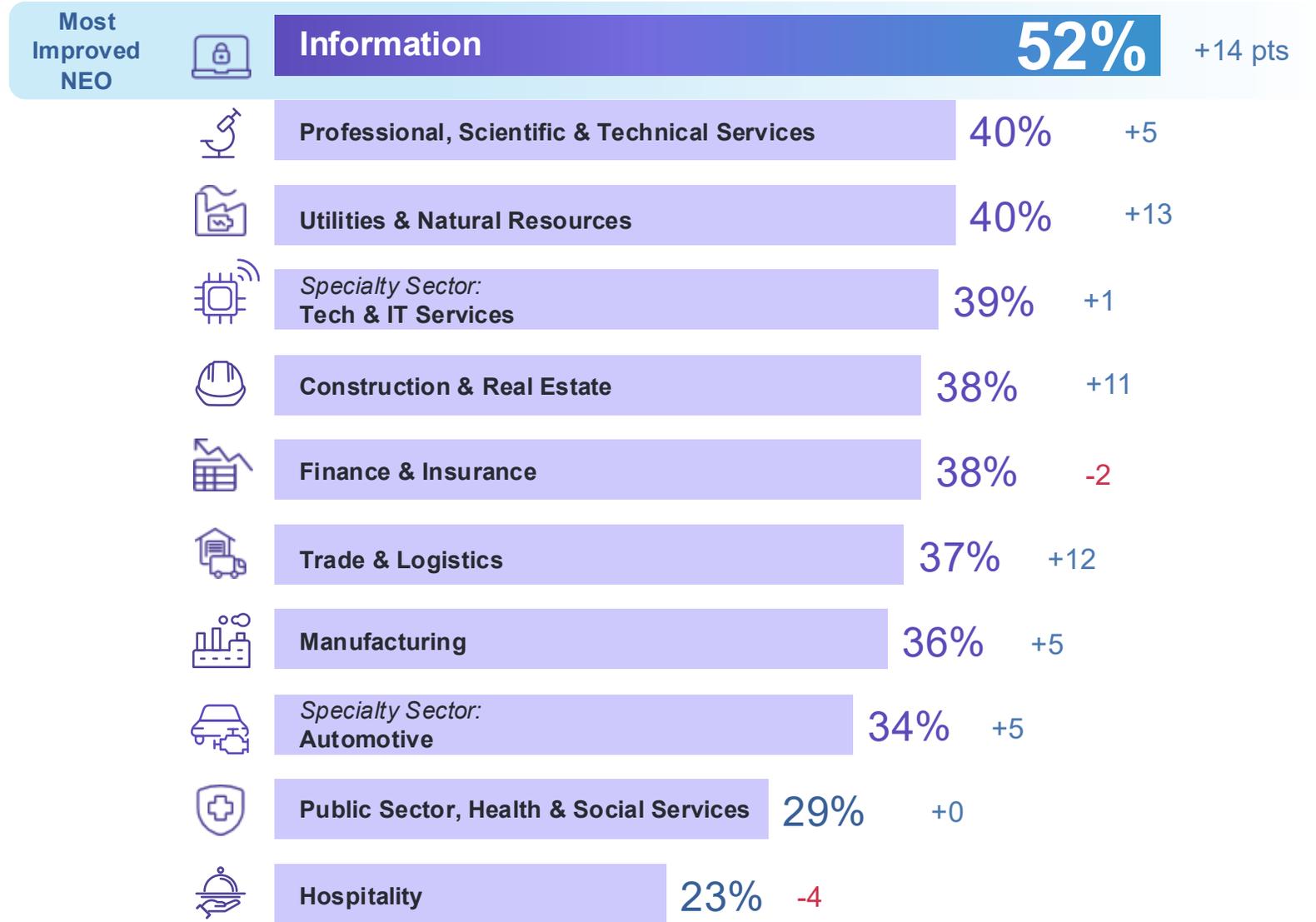

38%

**Q2 2026
APME NEO**
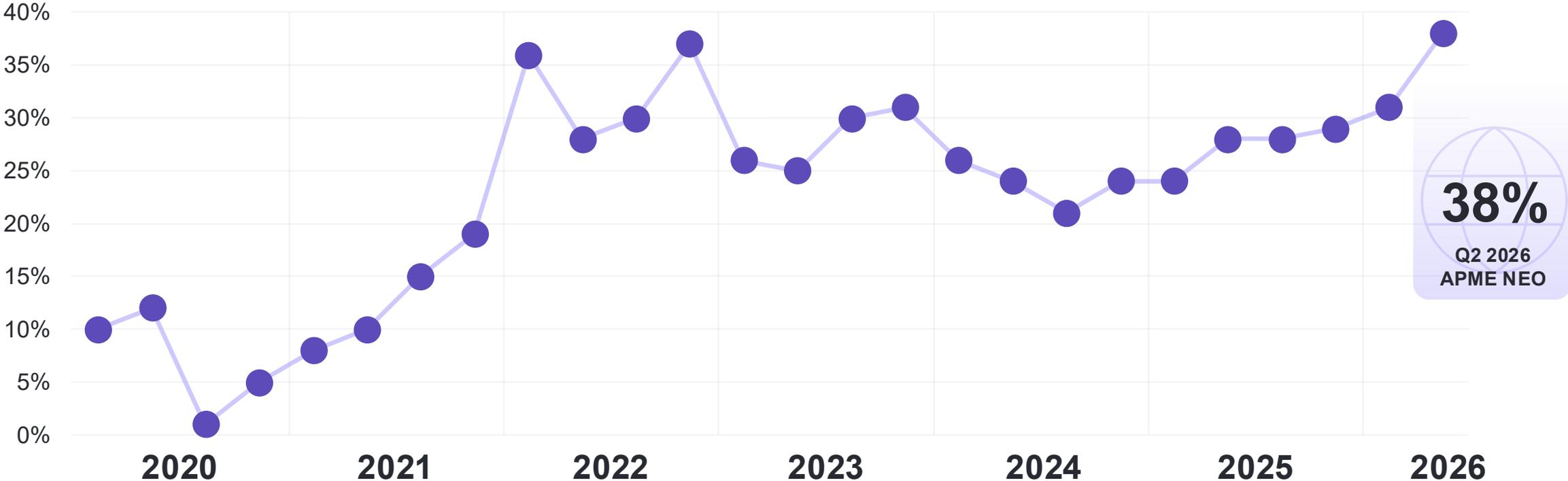
Outlooks Across Key Industry Sectors in APME

APME Employers across the **Information sector** reported both the highest and most improved NEO when compared to the previous quarter.

Note:
Tech & IT Services is a specialty sector that combines subsectors across Manufacturing, Information, and Professional Services to provide a holistic view of all aspects relating to IT and telecoms.

Automotive is a specialty sector that combines subsectors across Manufacturing and Trade & Logistics to provide a holistic view of all aspects relating to the automotive value chain.

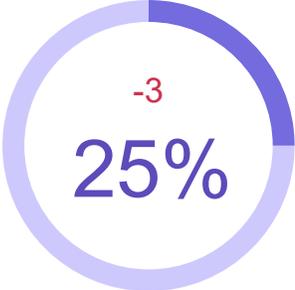| Most Improved NEO	Information	52%	+14 pts
	Professional, Scientific & Technical Services	40%	+5
	Utilities & Natural Resources	40%	+13
	Specialty Sector: Tech & IT Services	39%	+1
	Construction & Real Estate	38%	+11
	Finance & Insurance	38%	-2
	Trade & Logistics	37%	+12
	Manufacturing	36%	+5
	Specialty Sector: Automotive	34%	+5
	Public Sector, Health & Social Services	29%	+0
	Hospitality	23%	-4

Hiring Expectations by Company Size in APME

Organizations in APME with **5,000 or more employees** reported the most positive NEO for Q2 2026, while those with **250 to 999 employees** anticipated the strongest improvement since last quarter.
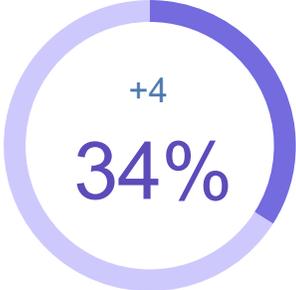
Less than 10 Employees	**10 - 49** Employees	**50 - 249** Employees	**250 - 999** Employees	**1,000 - 4,999** Employees	**5,000+** Employees
+7 pts **29%**	-3 **25%**	+4 **34%**	+11 **41%**	+4 **39%**	+10 **47%**
			Most Improved NEO		**Strongest NEO**
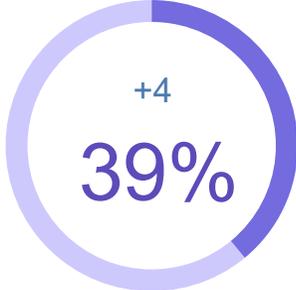
Hiring Expectations for April – June by Country

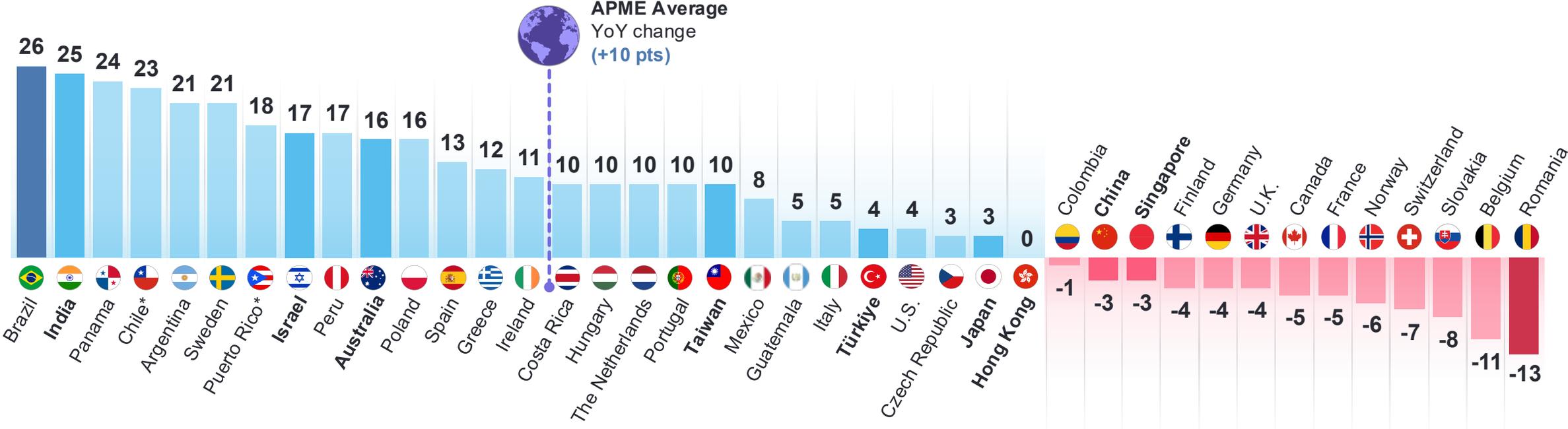Employers in **India** reported the **strongest** quarterly NEO **improvement** (**+16 pts**).

38%
APME Average

India	**68%**	Australia	33%	Norway	21%
U.A.E. #*	60%	Puerto Rico*	32%	Greece	20%
Brazil	55%	Poland	31%	Colombia	18%
Vietnam*	47%	China	29%	Germany	18%
Panama	44%	Israel	29%	Hungary	18%
Costa Rica	43%	Portugal	29%	Switzerland	18%
Mexico	41%	Taiwan	29%	Japan	17%
Sweden	39%	Spain	28%	Finland	15%
U.S.	38%	U.K.	27%	France	15%
The Netherlands	37%	Canada	24%	Belgium	13%
Peru	37%	Singapore	24%	Czech Republic	13%
Chile*	36%	Argentina	23%	Hong Kong	11%
Ireland	36%	Italy	22%	Slovakia	3%
Guatemala	34%	Türkiye	22%	**Romania**	**-5%**

The data for the second quarter was collected between January 1 and February 3, 2026, prior to geopolitical developments that began across the Middle East in late February. The findings reflect employer sentiment at the time of data collection and may not capture the potential impact of subsequent events.

*The NEOs for Chile, Puerto Rico, the U.A.E., and Vietnam are currently unadjusted and will be seasonally adjusted after sixteen quarters of data.

Year-Over-Year Changes by Country

APME Average
YoY change
(+10 pts)

Country	Value
Brazil	26
India	25
Panama	24
Chile*	23
Argentina	21
Sweden	21
Puerto Rico*	18
Israel	17
Peru	17
Australia	16
Poland	16
Spain	13
Greece	12
Ireland	11
Costa Rica	10
Hungary	10
The Netherlands	10
Portugal	10
Taiwan	10
Mexico	8
Guatemala	5
Italy	5
Türkiye	4
U.S.	4
Czech Republic	3
Japan	3
Hong Kong	0
Colombia	-1
China	-3
Singapore	-3
Finland	-4
Germany	-4
U.K.	-4
Canada	-5
France	-5
Norway	-6
Switzerland	-7
Slovakia	-8
Belgium	-11
Romania	-13

*The NEOs for Chile, Puerto Rico, the U.A.E., and Vietnam are currently unadjusted and will be seasonally adjusted after sixteen quarters of data.
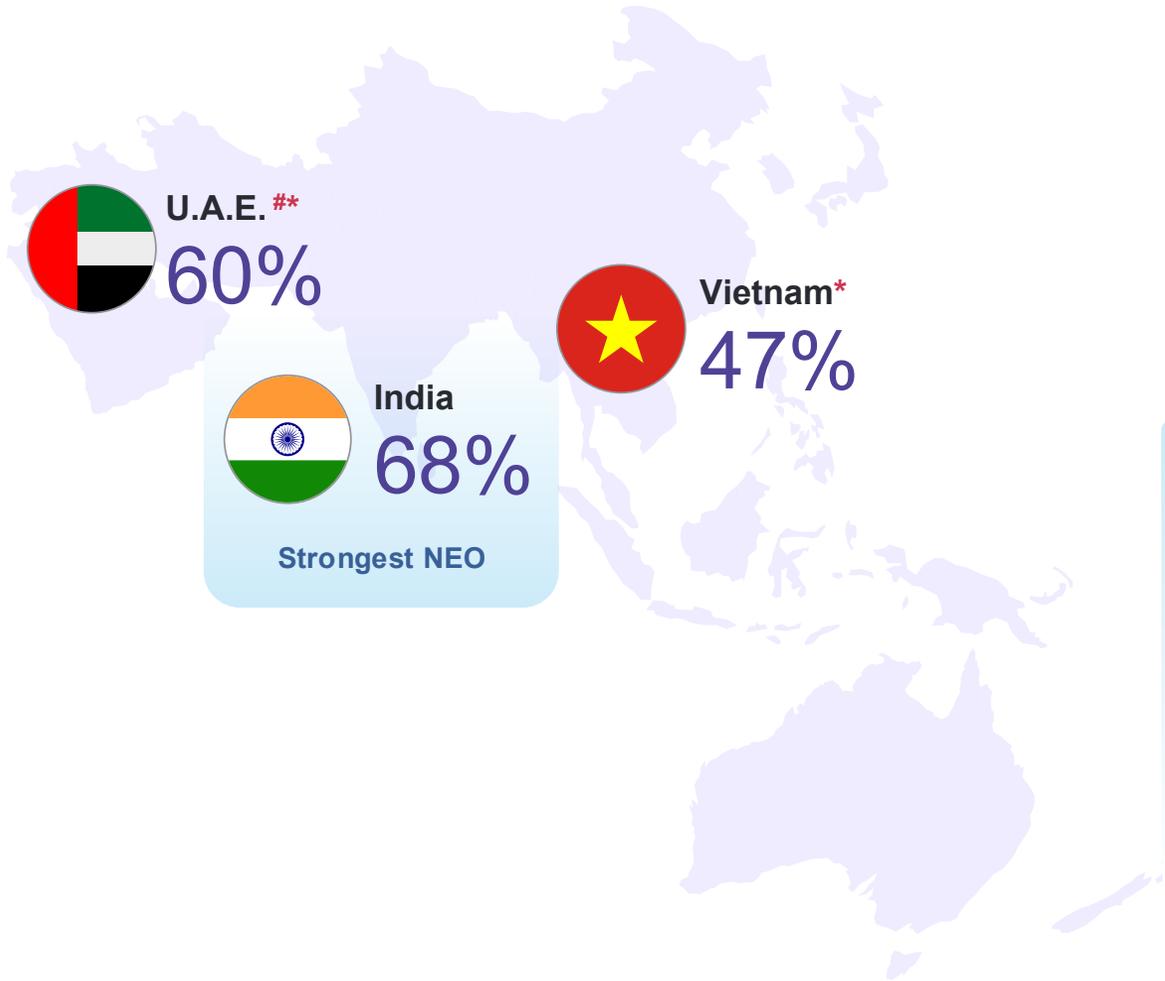
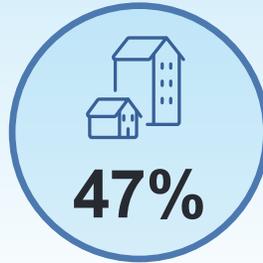# Employment Outlooks Across the Asia Pacific and Middle East

U.A.E. #*
60%

Vietnam*
47%

India
68%
Strongest NEO

The NEO in APME **improved** since the previous quarter (**+7 pts**) and year-over-year (**+10 pts**).

Hiring demand across the region is driven by employers in:

52%
Information

47%
Organizations with 5,000 or more employees

The data for the second quarter was collected between January 1 and February 3, 2026, prior to geopolitical developments that began across the Middle East in late February. The findings reflect employer sentiment at the time of data collection and may not capture the potential impact of subsequent events.

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Workforce Trends across APME
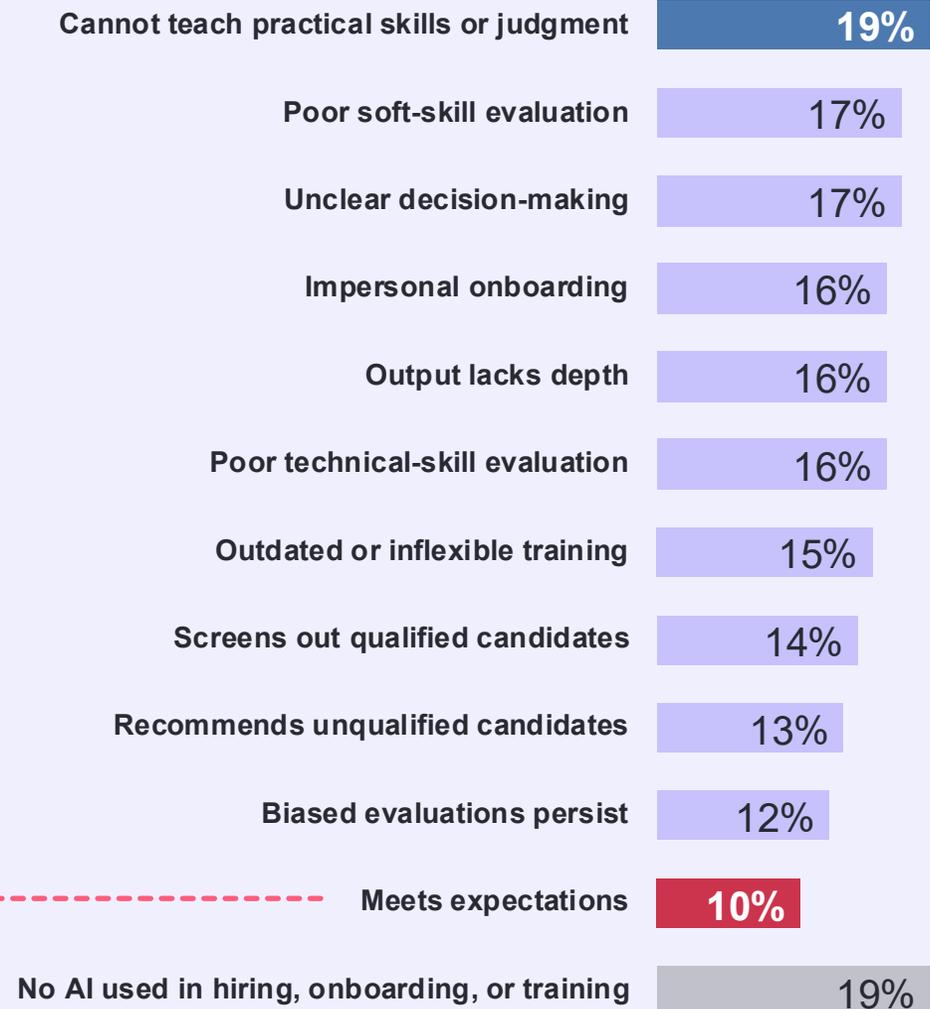
Where APME Employers See the Most ROI from AI

26%
Learning & Development

17%
Team Performance

15%
Talent Acquisition

13%
Scheduling or Forecasting

9%
Safety or Compliance

4%
Attrition Prediction

3%
Unsure

11%
No Realized ROI to Date

Employers say AI for **Learning & Development** delivered the **highest ROI.**

AI's Unmet Expectations
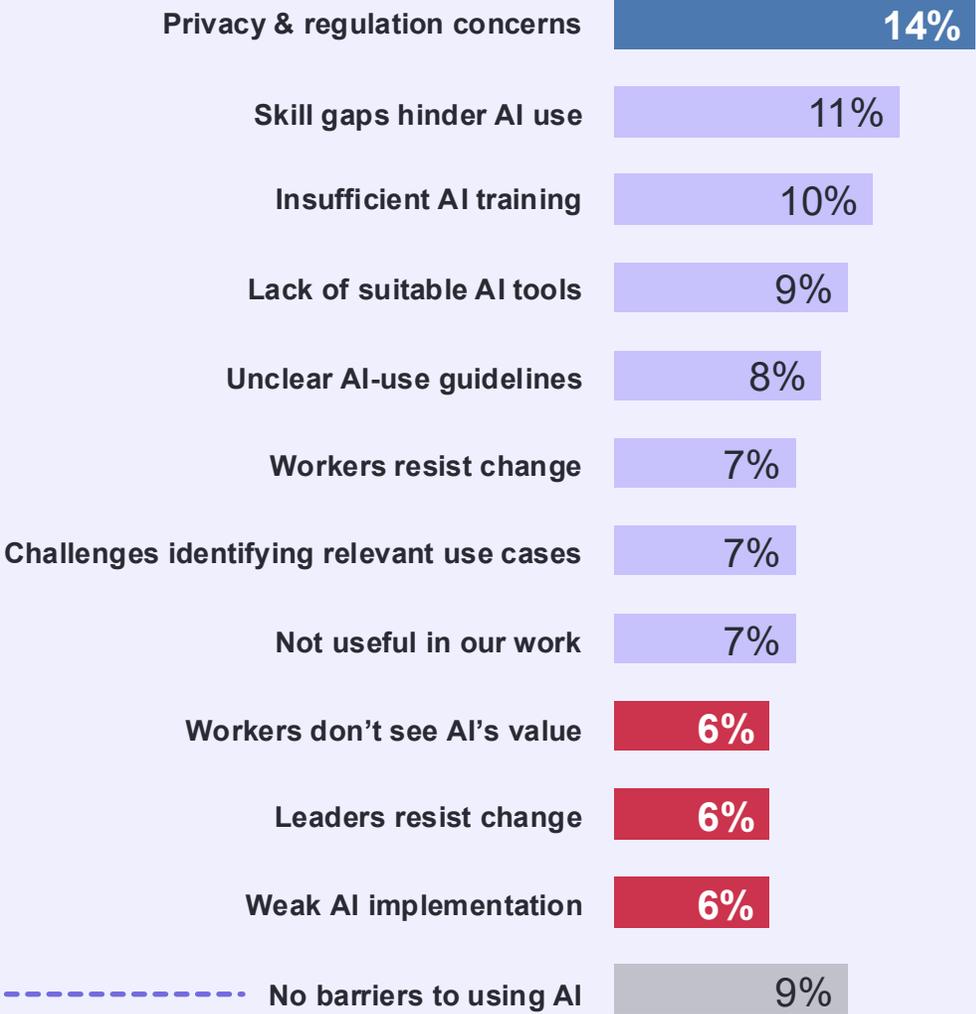
Only **10% of employers in APME** say **current AI solutions meet their expectations** for hiring, onboarding, and training.

Cannot teach practical skills or judgment	19%
Poor soft-skill evaluation	17%
Unclear decision-making	17%
Impersonal onboarding	16%
Output lacks depth	16%
Poor technical-skill evaluation	16%
Outdated or inflexible training	15%
Screens out qualified candidates	14%
Recommends unqualified candidates	13%
Biased evaluations persist	12%
Meets expectations	10%
No AI used in hiring, onboarding, or training	19%

Respondents were able to choose more than one option. Therefore, the sum of the percentages is greater than 100%.
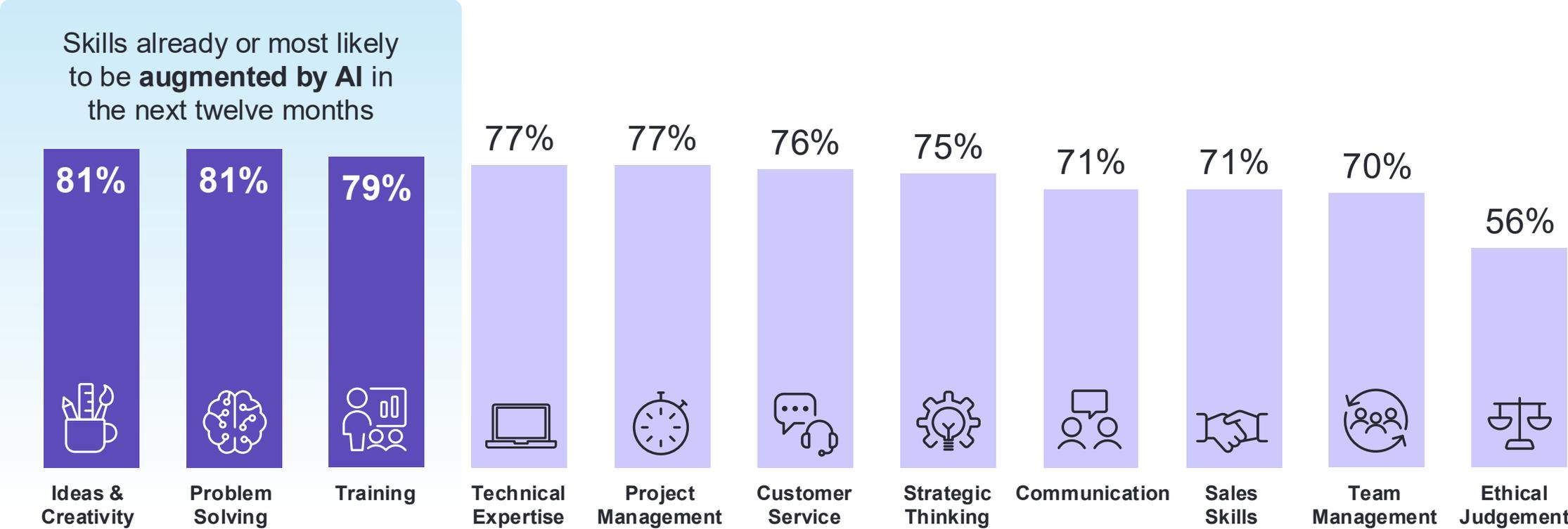
Key Challenges Workers Face with AI

91% of organizations in APME report workforce **challenges using AI**, driven primarily by **privacy and regulatory concerns**, with **skill gaps and insufficient training** close behind.

Challenge	%
Privacy & regulation concerns	14%
Skill gaps hinder AI use	11%
Insufficient AI training	10%
Lack of suitable AI tools	9%
Unclear AI-use guidelines	8%
Workers resist change	7%
Challenges identifying relevant use cases	7%
Not useful in our work	7%
Workers don't see AI's value	6%
Leaders resist change	6%
Weak AI implementation	6%
No barriers to using AI	9%

Respondents ranked their top five barriers. Therefore, the sum of the percentages may not add up to 100%.

Skills Most (and Least) Affected by AI Augmentation

Skills already or most likely to be augmented by AI in the next twelve months

Ideas & Creativity	Problem Solving	Training	Technical Expertise	Project Management	Customer Service	Strategic Thinking	Communication	Sales Skills	Team Management	Ethical Judgement
81%	81%	79%	77%	77%	76%	75%	71%	71%	70%	56%

Respondents were able to choose more than one option. Therefore, the sum of the percentages is greater than 100%.

About the Survey

About the Survey

The ManpowerGroup Employment Outlook Survey 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 Q2 2026 survey is based on interviews with 41,764 public and private employers across 42 countries to measure anticipated employment changes and trends. This sample allows for analysis to be performed across specific sectors and regions to provide more detailed information.

Focused – For more than six decades the survey has derived all its information from a single question (Q2 2026 example): "How do you anticipate total employment at your location to change in the three months to the end of June 2026 as compared to the current quarter?"

Survey Methodology – The data for the second quarter was collected between January 1 and February 3, 2026, prior to geopolitical developments that began across the Middle East in late February. The findings reflect employer sentiment at the time of data collection and may not capture the potential impact of subsequent events. The size of organizations and sectors are standardized across all countries to allow international comparisons.

Forward-Looking Statements – This report contains forward-looking statements, including statements regarding labor demand in certain regions, countries and industries, and economic uncertainty. Actual events or results may differ materially from those contained in the forward-looking statements, due to risks, uncertainties and assumptions. These factors include those found in the Company's reports filed with the U.S. Securities and Exchange Commission (SEC), including the information under the heading "Risk Factors" in its Annual Report on Form 10-K for the year ended December 31, 2025, whose information is incorporated herein by reference. ManpowerGroup disclaims any obligation to update any forward-looking or other statements in this release, except as required by law.

Frequently Asked Questions

What is meant by Net Employment Outlook (NEO)?

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 that expect to see a decrease in employment at their location in the next quarter. A positive Net Employment Outlook figure means that, on balance, there are more employers who expect to add to their headcount in the following three months than those who intend to reduce staff.

What is Seasonal Adjustment and why is it used in the ManpowerGroup Employment Outlook Survey?

Seasonal adjustment is a statistical process that allows the Survey data to be presented without the impact of hiring fluctuations that normally occur through the course of the year, usually as a result of various external factors, such changes in weather, traditional production cycles, and public holidays. Seasonal adjustment has the effect of flattening peaks and smoothing troughs in the data to better illustrate underlying employment trends and provide a more accurate representation of the ManpowerGroup Employment Outlook Survey results.

How are companies selected for the survey?

Employers are selected based on the types of companies and organizations they represent. We want to ensure that our panel is representative of each participating country's national labor market, so each country's panel is built in proportion to that country's overall distribution of industry sectors and organization sizes.

Who do you interview in each company?

The person we select to interview will be someone with a good overview of staffing levels and hiring intentions within their organization. Normally this will be the head of HR or an HR manager. However, in smaller organizations, that person may be a general manager or even the CEO.

Industry Sectors Defined

Beginning with the Q1 2026 survey, the industry sectors have been updated to align with the North American Industry Classification System (NAICS). Historical data has been reclassified and will still be available as defined below.

Construction & Real Estate: Construction; Real Estate; Building Products; Construction & Engineering; Trading Companies & Distributors; Other Industrials Sub-Industry; Construction Materials; Real Estate Management & Development; Construction of Buildings; Heavy and Civil Engineering Construction; Specialty Trade Contractors; Rental and Leasing Services; and Lessors of Nonfinancial Intangible Assets.

Finance and Insurance: Banking, Finance and Insurance; Banks; Thrifts & Mortgage Finance; Diversified Financial Services; Consumer Finance; Capital Markets; Mortgage Real Estate Investment Trusts; Insurance; Equity Real Estate Investment Trusts; Other Financials & Real Estate Sub-Industry; Monetary Authorities-Central Bank; Credit Intermediation and Related Activities; Securities, Commodity Contracts, and Other Financial Investments and Related Activities; Insurance Carriers and Related Activities; Funds, Trusts, and Other Financial Vehicles.

Hospitality: Leisure Facilities, Gaming & Casinos; Accommodation, Restaurants, Hotels, Resorts & Cruise Lines; Arts, Entertainment, and Recreation; Accommodation and Food Services

Information: Software; Communications Equipment; Technology Hardware, Storage & Peripherals; Other IT Sub-Industry; Diversified Telecommunication Services; Wireless Telecommunication Services; Media and Publishing; Entertainment; Interactive Media & Services; Other Communication Sub-Industry; Motion Picture and Sound Recording Industries; Newspaper, Periodical, Book, and Directory Publishers; Software Publishers; Broadcasting and Content Providers; Telecommunications; Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services; Web Search Portals, Libraries, Archives, and Other Information Services.

Manufacturing: Manufacturing; Aerospace & Defense; Electrical Equipment; Machinery; Chemicals; Other Materials Sub-Industry; Electronic Equipment, Instruments & Components; Semiconductors & Semiconductor Equipment; Industrials Manufacturing; Energy & Utilities Manufacturing; Materials Manufacturing; Transportation Manufacturing; Consumer Goods & Services Manufacturing; Health Care & Life Sciences Manufacturing; IT Manufacturing; Communication Services Manufacturing; Other Manufacturing; Food Manufacturing; Beverage and Tobacco Product Manufacturing; Textile Mills; Textile Product Mills; Apparel Manufacturing; Leather and Allied Product Manufacturing; Wood Product Manufacturing; Paper Manufacturing; Printing and Related Support Activities; Petroleum and Coal Products Manufacturing; Basic Chemical Manufacturing; Resin, Synthetic Rubber, and Artificial and Synthetic Fibers and Filaments Manufacturing; Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing; Pharmaceutical and Medicine Manufacturing; Paint, Coating, and Adhesive Manufacturing; Soap, Cleaning Compound, and Toilet Preparation Manufacturing; Other Chemical Product and Preparation Manufacturing; Plastics and Rubber Products Manufacturing; Nonmetallic Mineral Product Manufacturing; Primary Metal Manufacturing; Fabricated Metal Product Manufacturing; Machinery Manufacturing; Computer and Peripheral Equipment Manufacturing; Communications Equipment Manufacturing; Audio and Video Equipment Manufacturing; Semiconductor and Other Electronic Component Manufacturing; Navigational, Measuring, Electromedical, and Control Instruments Manufacturing; Manufacturing and Reproducing Magnetic and Optical Media; Electrical Equipment, Appliance, and Component Manufacturing; Motor Vehicle Manufacturing; Motor Vehicle Body and Trailer Manufacturing; Motor Vehicle Parts Manufacturing; Aerospace Product and Parts Manufacturing; Railroad Rolling Stock Manufacturing; Ship and Boat Building; Other Transportation Equipment Manufacturing; Furniture and Related Product Manufacturing; Miscellaneous Manufacturing.

Industry Sectors Defined Continued

Professional, Scientific & Technical Services: Professional, Scientific and Technical Activities; Commercial Services & Supplies; Professional Services; Specialized Consumer Services; IT Services; Administrative and Support Services; Legal Services; Accounting, Tax Preparation, Bookkeeping, and Payroll Services; Architectural, Engineering, and Related Services; Specialized Design Services; Computer Systems Design and Related Services; Management, Scientific, and Technical Consulting Services; Scientific Research and Development Services; Advertising, Public Relations, and Related Services; Other Professional, Scientific, and Technical Services; Management of Companies and Enterprises.

Public Sector, Health & Social Services: Education; Human Health and Social Work; Government (National or Local) or Public Service; Education Services; Health Care Equipment & Supplies; Health Care Providers & Services; Health Care Technology; Biotechnology; Pharmaceuticals; Life Sciences Tools & Services; Other Health Care & Life Sciences Sub-Industry; Not for Profit / Charity / Religious Organization; Educational Institutions; Educational Services; Health Care and Social Assistance; Other Services (except Public Administration); Public Administration.

Trade & Logistics: Wholesale and Retail Trade; Repair of Vehicles; Containers & Packaging; Paper & Forest Products; Air Freight & Logistics; Airlines; Marine; Road & Rail; Transportation Infrastructure; Auto Components; Automobiles; Other Transport, Logistics & Automobiles Sub-Industry; Household Durables; Leisure Products; Textiles, Apparel & Luxury Goods; Distributors; Online & Direct Marketing Retail; Multiline Retail (Department Stores, etc.); Specialty Retail (Apparel, Technology, etc.); Other Consumer Discretionary Goods & Services Sub-Industry; Food & Staples Retailing; Beverages; Food Products; Tobacco; Household Products; Personal Products; Other Consumer Staples Sub-Industry; Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers; Furniture and Home Furnishing Merchant Wholesalers; Lumber and Other Construction Materials Merchant Wholesalers; Professional and Commercial Equipment and Supplies Merchant Wholesalers; Metal and Mineral (except Petroleum) Merchant Wholesalers; Household Appliances and Electrical and Electronic Goods Merchant Wholesalers; Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers; Machinery, Equipment, and Supplies Merchant Wholesalers; Miscellaneous Durable Goods Merchant Wholesalers; Paper and Paper Product Merchant Wholesalers; Drugs and Druggists' Sundries Merchant Wholesalers; Apparel, Piece Goods, and Notions Merchant Wholesalers; Grocery and Related Product Merchant Wholesalers; Farm Product Raw Material Merchant Wholesalers; Chemical and Allied Products Merchant Wholesalers; Petroleum and Petroleum Products Merchant Wholesalers; Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers; Miscellaneous Nondurable Goods Merchant Wholesalers; Wholesale Trade Agents and Brokers; Motor Vehicle and Parts Dealers; Building Material and Garden Equipment and Supplies Dealers; Food and Beverage Retailers; Furniture, Home Furnishings, Electronics, and Appliance Retailers; General Merchandise Retailers; Health and Personal Care Retailers; Gasoline Stations and Fuel Dealers; Clothing, Clothing Accessories, Shoe, and Jewelry Retailers; Sporting Goods, Hobby, Musical Instrument, Book, and Miscellaneous Retailers; Air Transportation; Rail Transportation; Water Transportation; Truck Transportation; Transit and Ground Passenger Transportation; Pipeline Transportation; Scenic and Sightseeing Transportation; Support Activities for Transportation; Postal Service; Couriers and Messengers; Warehousing and Storage.

Utilities & Natural Resources: Mining and Quarrying; Electricity, Gas and Air Conditioning Supply; Water Supply; Sewerage, Waste Management and Remediation Activities; Energy Equipment & Services; Oil, Gas & Consumable Fuels; Electric Utilities; Gas Utilities; Multi-Utilities; Water Utilities; Waste Remediation; Independent Power and Renewable Electricity Producers; Other Energy and Utilities Sub-Industry; Metals & Mining; Agriculture and Fishing; Agriculture, Forestry, Fishing and Hunting; Oil and Gas Extraction; Mining (except Oil and Gas); Support Activities for Mining; Utilities; Waste Management and Remediation Services.