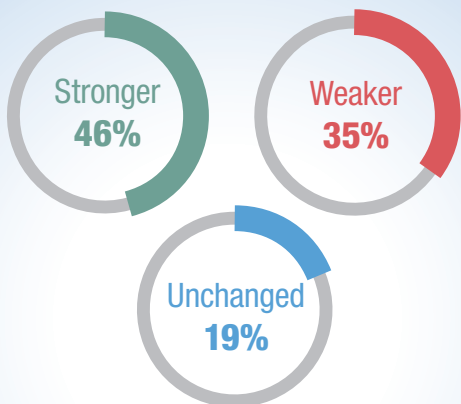


WHERE are hiring plans strongest? are hiring plans weakest?

How are employer hiring plans changing?

QUARTER-OVER QUARTER

Compared to 43 countries & territories surveyed for Q4 2017

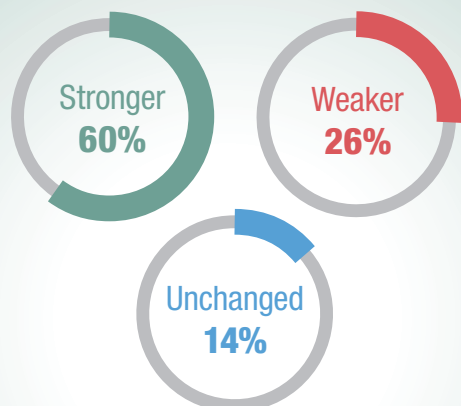


Notable Shifts

	PERU	10%
	PORTUGAL	10%
	AUSTRALIA	4%
	SINGAPORE	2%
	IRELAND	5%
	AUSTRIA	8%

YEAR-OVER-YEAR

Compared to 43 countries & territories surveyed for Q1 2017



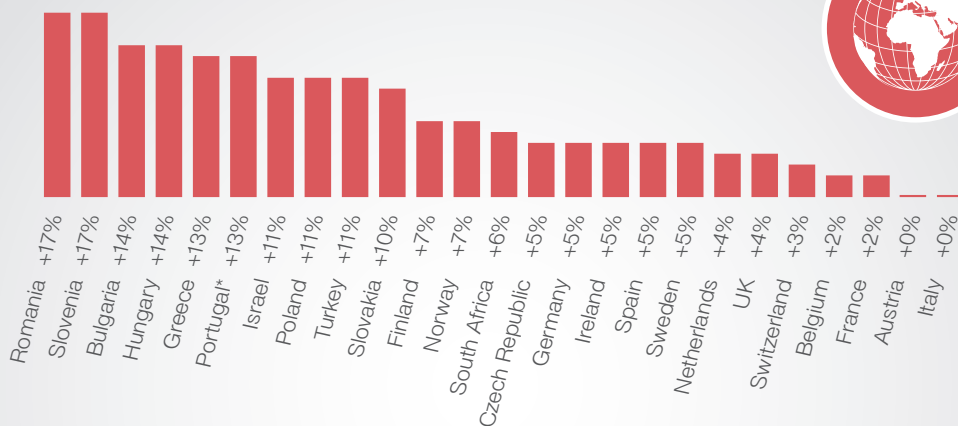
Notable Shifts

	BRAZIL	13%
	GREECE	5%
	AUSTRALIA	5%
	BELGIUM	4%
	GUATEMALA	5%
	AUSTRIA	6%

Net Employment Outlooks



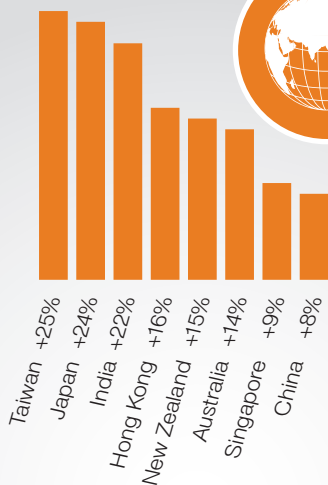
EMEA



- Staffing levels forecast to grow in Q1 in 23 of the 25 countries; only employers in Austria & Italy forecast flat hiring.
- Compared to Q4 2017, hiring prospects are stronger in 10 countries, weaker in 10, unchanged in 5.
- Compared to Q1 2017, hiring plans are stronger in 14 countries, weaker in 8, unchanged in 3.
- Outlooks in Bulgaria & Finland remain their most optimistic reports to date.



ASIA PACIFIC



- Employers expect Q1 payroll growth in all 8 countries/territories.
- Compared to Q4 2017, hiring intentions are stronger in 5 countries/territories, weaker in 2, unchanged in 1.
- Compared to Q1 2017, hiring intentions are stronger in 6 countries/territories, weaker in none, unchanged in 2.
- Australia's Outlook (+14%) strongest in more than 6 years.



AMERICAS



- Staffing levels forecast to grow in all 10 countries.
- Compared with Q4 2017, Outlooks improve in 5 countries, decline in 3, unchanged in 2.
- Compared to Q1 2017, hiring plans are stronger in 6 countries, weaker in 3, unchanged in 1.
- Employer confidence in Brazil climbs for 4th consecutive quarter; Outlook is strongest in 3 years.

*Indicates unadjusted data