

**Manpower  
Employment  
Outlook Survey  
United States**

**Q3  
2016**



ManpowerGroup™

# United States Employment Outlook

More than 11,000 interviews have been conducted with employers within the United States, including all 50 states, the top 100 Metropolitan Statistical Areas (MSAs), the District of Columbia and Puerto Rico, to measure hiring intentions between July and September 2016. The mix of industries within the survey follows the North American Industry Classification System (NAICS) supersectors and is structured to be representative of the U.S. economy. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of September 2016 compared to the current quarter?”

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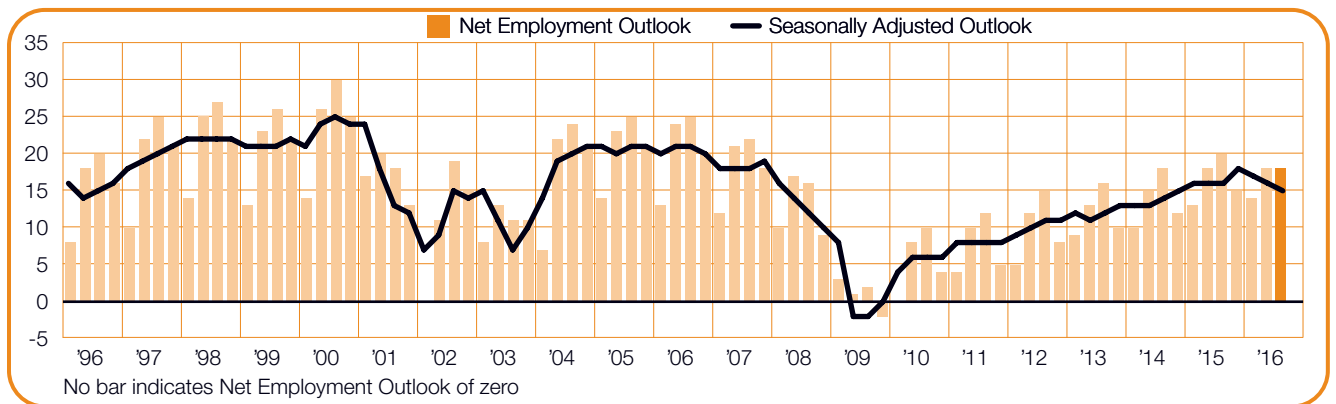
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# United States Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Quarter 3 2016</b>	<b>23</b>	<b>5</b>	<b>71</b>	<b>1</b>	<b>18</b>	<b>15</b>
Quarter 2 2016	22	4	72	2	18	16
Quarter 1 2016	20	6	72	2	14	17
Quarter 4 2015	21	6	71	2	15	18
Quarter 3 2015	24	4	70	2	20	16



During Quarter 3 2016, 23 percent of U.S. employers surveyed expect payrolls to increase. Meanwhile, 5 percent of employers anticipate a decline in staffing levels and 71 percent expect no change in their hiring plans.

Once the data is adjusted to allow for seasonal variation, the Net Employment Outlook is +15%.

Hiring prospects nationwide remain relatively stable, both quarter-over-quarter and year-over-year.

When compared with Quarter 2 2016, Net Employment Outlooks weaken in three of the four U.S. regions surveyed. A decrease of 2 percent is reported in the Midwest, while Outlooks are 1 percent weaker in both the Northeast and South. However, employers in the

West report an improvement of 1 percent. When seasonal variations are removed from the data, employers in the West anticipate the strongest hiring pace for Quarter 3 2016, reporting a Net Employment Outlook of +17%. The Outlook for the South is +16%, while employers in the Midwest and Northeast report Outlooks of +15% and +14%, respectively.

Hiring intentions remain relatively stable in the Northeast, South and West when compared with Quarter 2 2016. Employers in the Midwest report a slightly weaker labor market. Compared to one year ago at this time, the Outlook is relatively stable in the Northeast and the West, and declines slightly in the Midwest and South.

*Please note that throughout this report, the figure used in all graphs is the "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. In addition, percentage totals may not equal 100% due to rounding.*

# Industry Sector Comparisons

For the U.S. as a whole, employers in 12 of the 13 industry sectors report positive hiring prospects for Quarter 3 2016, based on seasonally adjusted data: Leisure & Hospitality (+23%), Wholesale & Retail Trade (+20%), Transportation & Utilities (+19%), Professional & Business Services (+18%), Nondurable Goods Manufacturing (+14%), Construction (+13%), Education & Health Services (+13%), Information (+13%), Durable Goods Manufacturing (+13%), Financial Activities (+12%), Government (+12%) and Other Services (+9%). Employers in the Mining sector expect payrolls to decline, reporting an Outlook of (-4%).

When compared to Quarter 2 2016, employers in the Durable Goods Manufacturing sector nationwide expect a slight increase in hiring.

In the following nationwide sectors, hiring intentions remain relatively stable quarter-over-quarter:

Education & Health Services, Government, Information, Nondurable Goods Manufacturing, Other Services, Professional & Business Services and Transportation & Utilities.

A slight decrease in employment levels is expected in the Construction, Financial Activities and Wholesale & Retail Trade sectors. Moderate declines are reported for the same period in the Leisure & Hospitality and Mining sectors.

The results for the Mining sector are reported only in the national survey data to ensure statistical accuracy.

Industry	Increase %	Decrease %	No Change %	Don't Know %	Net Employment Outlook Q3 2016 %	Seasonally Adjusted %
Construction	25	4	68	3	21	13
Education & Health Services	18	5	75	2	13	13
Financial Activities	17	3	79	1	14	12
Government	19	5	73	3	14	12
Information	18	5	75	2	13	13
Leisure & Hospitality	37	6	55	2	31	23
Manufacturing – Durable Goods	19	4	75	2	15	13
Manufacturing – Nondurable Goods	21	4	73	2	17	14
Mining	10	11	73	6	-1	-4
Other Services	14	3	81	2	11	9
Professional & Business Services	25	4	70	1	21	18
Transportation & Utilities	27	5	66	2	22	19
Wholesale & Retail Trade	26	4	68	2	22	20

# Regional Comparisons

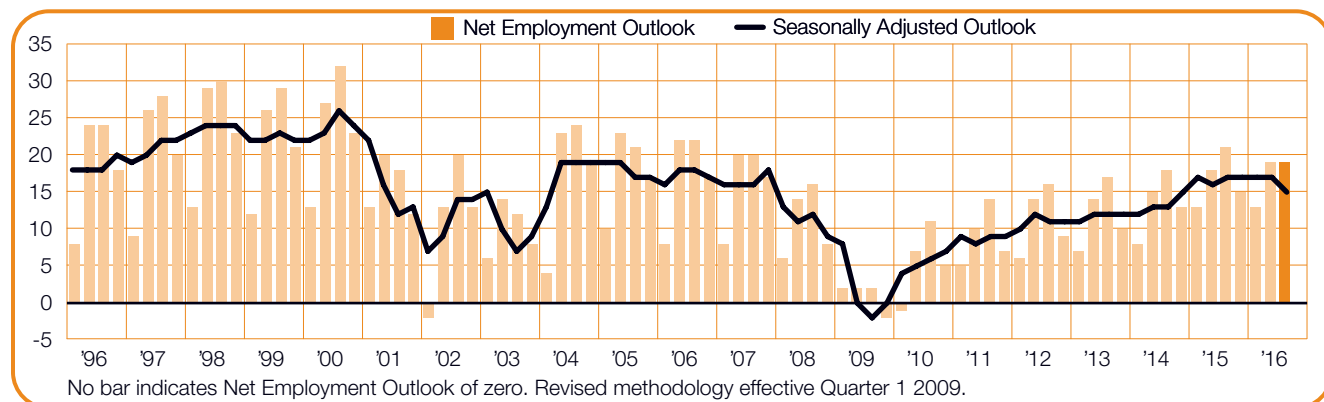
**+19 (+15)%** Midwest

Payrolls are expected to increase in Quarter 3 2016 by 23 percent of Midwest employers surveyed, while 4 percent anticipate a decline. The resulting Net Employment Outlook is +19%. When seasonal variations are removed from the data, hiring prospects are slightly weaker both quarter-over-quarter and year-over-year.

Compared to Quarter 2 2016, Midwest employers report considerably stronger hiring plans in the Nondurable Goods Manufacturing sector. Elsewhere, slight improvements are reported in the Net Employment Outlooks for three Midwest sectors: Information, Durable Goods Manufacturing and Wholesale & Retail Trade.

Employers anticipate hiring remaining relatively stable in three sectors: Education & Health Services, Other Services and Professional & Business Services.

Slightly weaker hiring is anticipated by Government employers during Quarter 3 2016, while Financial Activities sector employers report a moderate decline in the Outlook. Meanwhile, considerably weaker hiring is expected in the Construction, Leisure & Hospitality and Transportation & Utilities sectors.



Industry	Increase %	Decrease %	No Change %	Don't Know %	Net Employment Outlook Q3 2016 %	Seasonally Adjusted %
<b>All Industries – Midwest</b>	<b>23</b>	<b>4</b>	<b>72</b>	<b>1</b>	<b>19</b>	<b>15</b>
Construction	27	4	66	3	23	9
Education & Health Services	16	5	76	3	11	11
Financial Activities	15	2	83	0	13	12
Government	14	2	80	4	12	9
Information	15	7	77	1	8	10
Leisure & Hospitality	38	5	55	2	33	23
Manufacturing – Durable Goods	20	4	76	0	16	13
Manufacturing – Nondurable Goods	28	1	70	1	27	24
Other Services	15	4	80	1	11	10
Professional & Business Services	27	4	68	1	23	20
Transportation & Utilities	19	4	76	1	15	10
Wholesale & Retail Trade	28	4	67	1	24	21

The Midwest Region comprises the following states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin.

**+19 (+14)%**

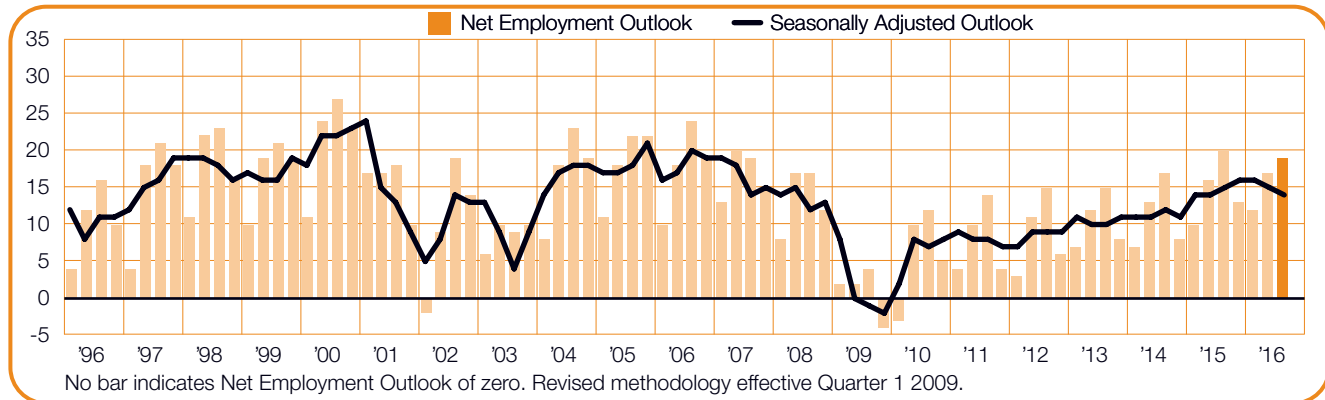
## Northeast

Employers in 23 percent of Northeast businesses surveyed expect to increase employment levels during Quarter 3 2016. With 4 percent of Northeast employers anticipating a decline in payrolls, the Net Employment Outlook is +19%. Once the data is adjusted for seasonal variation, the Outlook remains relatively stable both quarter-over-quarter and year-over-year.

Northeast employers in two industry sectors report slightly stronger hiring when compared with Quarter 2 2016: Education & Health Services and Durable Goods Manufacturing.

Relatively stable labor markets are predicted in six of the 12 industry sectors in the Northeast: Financial Activities, Government, Information, Other Services, Transportation & Utilities and Wholesale & Retail Trade.

Employers in the following sectors report slightly weaker hiring prospects when compared with Quarter 2 2016: Construction, Nondurable Goods Manufacturing and Professional & Business Services. A moderately weaker hiring pace is expected in the Leisure & Hospitality sector.



Industry	Increase %	Decrease %	No Change %	Don't Know %	Net Employment Outlook Q3 2016 %	Seasonally Adjusted %
<b>All Industries – Northeast</b>	<b>23</b>	<b>4</b>	<b>72</b>	<b>1</b>	<b>19</b>	<b>14</b>
Construction	24	2	72	2	22	7
Education & Health Services	18	5	75	2	13	13
Financial Activities	17	3	77	3	14	12
Government	13	6	78	3	7	5
Information	13	3	80	4	10	10
Leisure & Hospitality	42	4	51	3	38	21
Manufacturing – Durable Goods	19	3	76	2	16	12
Manufacturing – Nondurable Goods	13	3	84	0	10	8
Other Services	10	4	85	1	6	3
Professional & Business Services	28	3	68	1	25	21
Transportation & Utilities	29	5	65	1	24	25
Wholesale & Retail Trade	24	4	70	2	20	16

The Northeast Region comprises the following states: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont.

**+18 (+16)%**

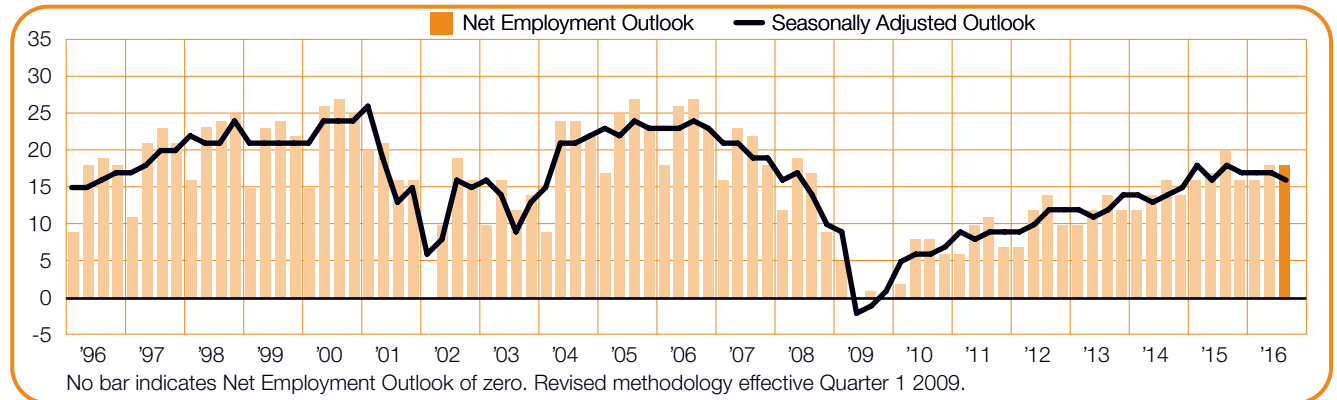
## South

In the South, 23 percent of employers surveyed anticipate an increase in employment levels during Quarter 3 2016, while 5 percent expect a decrease. The resulting Net Employment Outlook is +18%. When seasonal adjustment is applied to the data, hiring is relatively stable quarter-over-quarter but slightly weaker when compared with Quarter 3 2015.

Slightly stronger hiring prospects are reported in two of the industry sectors surveyed when compared with Quarter 2 2016: Professional & Business Services and Transportation & Utilities.

Hiring prospects remain relatively stable in five sectors: Education & Health Services, Financial Activities, Information, Nondurable Goods Manufacturing and Other Services.

Quarter-over-quarter, slight declines are reported in the Outlooks for the Construction, Government, Durable Goods Manufacturing and Wholesale & Retail Trade sectors, while moderately weaker hiring intentions are reported by employers in the Leisure & Hospitality sector.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q3 2016	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – South</b>	<b>23</b>	<b>5</b>	<b>70</b>	<b>2</b>	<b>18</b>	<b>16</b>
Construction	21	6	69	4	15	12
Education & Health Services	17	5	76	2	12	11
Financial Activities	18	3	78	1	15	14
Government	20	5	71	4	15	13
Information	22	3	72	3	19	17
Leisure & Hospitality	36	8	55	1	28	27
Manufacturing – Durable Goods	19	4	73	4	15	13
Manufacturing – Nondurable Goods	21	6	70	3	15	13
Other Services	12	3	83	2	9	8
Professional & Business Services	25	4	70	1	21	18
Transportation & Utilities	27	5	66	2	22	18
Wholesale & Retail Trade	25	5	68	2	20	20

The South Region comprises the District of Columbia and Puerto Rico along with the following states: Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia.

**+20 (+17)%**

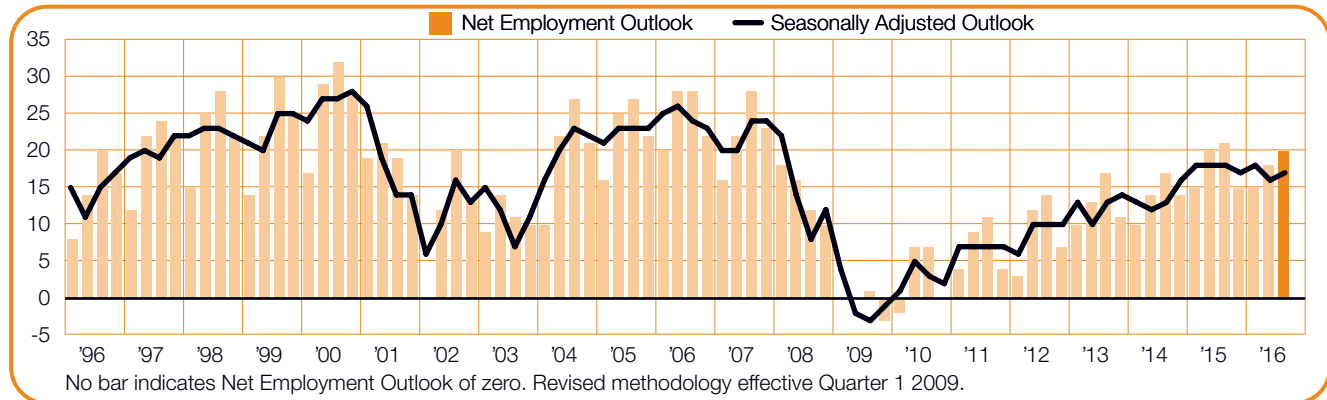
## West

Employment levels are expected to grow by 24 percent of employers surveyed in the West, while 4 percent anticipate a decrease in payrolls, resulting in a Net Employment Outlook of +20%. Once the data is adjusted to allow for seasonal variation, hiring prospects remain relatively stable both quarter-over-quarter and year-over-year.

Hiring prospects are moderately stronger for the Other Services sector when compared with Quarter 2 2016, and slight improvements are reported by employers in the Government sector and the Durable Goods Manufacturing sector.

In five sectors, employers in the West anticipate relatively stable hiring when compared with the previous quarter: Construction, Education & Health Services, Financial Activities, Information and Transportation & Utilities.

Employers in the Professional & Business Services and Wholesale & Retail Trade sectors report slight declines in the Outlook when compared with Quarter 2 2016. Elsewhere, moderately weaker hiring intentions are reported in both the Leisure & Hospitality and Nondurable Goods Manufacturing sectors.



Industry	Increase %	Decrease %	No Change %	Don't Know %	Net Employment Outlook Q3 2016 %	Seasonally Adjusted %
<b>All Industries – West</b>	<b>24</b>	<b>4</b>	<b>70</b>	<b>2</b>	<b>20</b>	<b>17</b>
Construction	30	2	65	3	28	20
Education & Health Services	19	5	75	1	14	14
Financial Activities	19	3	77	1	16	15
Government	26	5	65	4	21	20
Information	19	6	74	1	13	14
Leisure & Hospitality	35	6	57	2	29	23
Manufacturing – Durable Goods	18	4	77	1	14	9
Manufacturing – Nondurable Goods	18	5	73	4	13	9
Other Services	22	3	73	2	19	16
Professional & Business Services	21	3	75	1	18	15
Transportation & Utilities	30	6	62	2	24	21
Wholesale & Retail Trade	25	5	69	1	20	17

The West Region comprises the following states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming.



# Metropolitan Statistical Areas

For Quarter 3 2016, all 100 of the largest Metropolitan Statistical Areas (MSAs) in the United States report positive Net Employment Outlooks. Additional survey results for each MSA are available at [meos-press.manpowergroup.us](http://meos-press.manpowergroup.us).

Net Employment Outlook Q3 2016	Metropolitan Statistical Areas
34%	Albany
33%	Richmond
31%	Charleston
30%	Salt Lake City
29%	Deltona, Grand Rapids
28%	Sacramento, San Jose
27%	Boise City, Columbus, Portland
26%	Milwaukee
25%	Allentown, Chattanooga, Greenville, Louisville, Toledo
24%	Dallas, Memphis, Stockton
23%	Cincinnati, Knoxville, Ogden, Pittsburgh, Raleigh
22%	Augusta, Austin, Chicago, Dayton, Denver, Honolulu, Indianapolis, Jackson, Jacksonville
21%	Buffalo, Miami, Omaha, Spokane, Worcester
20%	Atlanta, Boston, McAllen, Nashville, San Diego, Seattle
19%	Albuquerque, Birmingham, Charlotte, Columbia, Greensboro, Little Rock, Minneapolis, Provo, San Francisco, Scranton, Winston-Salem
18%	Cleveland, Colorado Springs, Des Moines, El Paso, Los Angeles, New Haven, Orlando, Riverside, Rochester, Washington
17%	Detroit, Fresno, Oxnard, Springfield, Syracuse
16%	Baltimore, Harrisburg, Madison, North Port, Phoenix
15%	New York, Providence
14%	Bridgeport, Hartford, Kansas City
13%	Palm Bay, St. Louis, Tulsa, Virginia Beach, Wichita
12%	San Antonio
11%	Houston, Tampa, Tucson, Youngstown
10%	Cape Coral
9%	Akron, Lakeland, Las Vegas
5%	Bakersfield, Oklahoma City, Philadelphia
2%	Baton Rouge
1%	New Orleans

Survey results are available for the 100 largest Metropolitan Statistical Areas based on business establishment count.

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# Global Employment Outlook

ManpowerGroup interviewed nearly 59,000 employers across 43 countries and territories to forecast labor market activity\* in Quarter 3 2016. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of September 2016 as compared to the current quarter?”

The overview of global responses indicates that most employers expect varying levels of payroll growth over the next three months. The research reveals staffing levels are expected to grow in 40 of 43 countries and territories during the July-September time frame. However, a number of employers also indicate that overall payroll growth is likely to proceed at a more conservative pace than in the prior quarter or last year at this time. Significant upturns in overall employer confidence are few, and some declining trajectories reported previously—most notably in Brazil and China—continue unabated. Third-quarter hiring plans strengthen in 14 of 42 countries\*\* and territories when compared with the April-June time frame, are unchanged in seven, and weaken in 21. Outlooks improve in 13 countries and territories when compared with Quarter 3 2015, are unchanged in five, and decline in 24. Third-quarter hiring confidence is strongest in India, Japan, Taiwan, Guatemala, Romania and the United States, while employers in Brazil, Italy and Switzerland report the weakest hiring plans.

Throughout the Americas region, third-quarter workforce gains are expected in nine of 10 countries. However, Net Employment Outlooks decline in nine countries in comparison to the April-June period and are unchanged in one. Similarly, forecasts weaken in seven countries in comparison to Quarter 3 2015, strengthen in two, and remain unchanged in one. Employers in Guatemala and the United States report the region’s most optimistic third-quarter hiring plans. The only negative forecast—in the Americas region as well as across the globe—is reported by employers in Brazil.

Employers in 23 of 25 countries in the Europe, Middle East & Africa (EMEA) region expect to grow staffing levels over the next three months. In a quarter-over-quarter comparison, forecasts improve in 12 countries but weaken in seven. When compared year-over-year, job prospects are expected to improve in 10 countries and decline in 12. Romanian employers report the region’s strongest third-quarter hiring plans, while the weakest outlooks are reported in Italy and Switzerland. For the first time in eight years, there are no negative national forecasts reported among countries in the EMEA region. The third-quarter survey also includes Portugal for the first time, bringing the total of countries and territories participating in the Manpower Employment Outlook Survey to 43.

Job gains are expected in all eight countries and territories surveyed in the Asia Pacific region. However, hiring prospects weaken in five countries & territories in comparison to Quarter 2 2016, improve in two and are unchanged in one. Similarly, third-quarter forecasts weaken in five countries and territories when compared year-over-year, improve in only one and are unchanged in two. For the fourth consecutive quarter, employers in India report the most optimistic regional and global hiring plans. For the fourth consecutive quarter, employers in China report the region’s weakest forecast.

Full survey results for each of the 43 countries and territories included in this quarter’s survey, plus regional and global comparisons, can be found at [www.manpowergroup.com/meos](http://www.manpowergroup.com/meos). The next Manpower Employment Outlook Survey will be released on 13 September 2016 and will detail expected labor market activity for the fourth quarter of 2016.

\* Commentary is based on seasonally adjusted data where available. Data is not seasonally adjusted for Finland or Portugal.

\*\* Portugal joined the survey in Quarter 3 2016 and has no trend data to compare at this point.

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# 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. ManpowerGroup's comprehensive forecast of employer hiring plans has been running for more than 50 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 and territories in which it is conducted. The survey participants are not derived from ManpowerGroup's customer base.

**Robust:** The survey is based on interviews with nearly 59,000 public and private employers across 43 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:

For the Quarter 3 2016 research, 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 September 2016 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 survey has been structured to be representative of each national economy. The margin of error for all national, regional and global data is not greater than +/- 3.9%.

## 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 expecting to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook. Net Employment Outlooks for countries and territories that have accumulated at least 17 quarters of data are reported in a seasonally adjusted format unless otherwise stated.

Seasonal adjustments have been applied to the data for all participating countries except Finland and Portugal. ManpowerGroup 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, ManpowerGroup adopted the TRAMO-SEATS method of seasonal adjustment for data.

## Additional Information Available

Find complete survey results, including reports for the top 100 Metropolitan Statistical Areas, 50 states, District of Columbia and Puerto Rico on our website at [press.manpower.com](http://press.manpower.com).

## About ManpowerGroup™

ManpowerGroup® (NYSE: MAN) is the world's workforce expert, creating innovative workforce solutions for nearly 70 years. As workforce experts, we connect more than 600,000 people to meaningful work across a wide range of skills and industries every day. Through our ManpowerGroup family of brands—Manpower®, Experis®, Right Management® and ManpowerGroup® Solutions—we help more than 400,000 clients in 80 countries and territories address their critical talent needs, providing comprehensive solutions to resource, manage and develop talent. In 2016, ManpowerGroup was named one of the World's Most Ethical Companies for the sixth consecutive year and one of Fortune's Most Admired Companies, confirming our position as the most trusted and admired brand in the industry. See how ManpowerGroup makes powering the world of work humanly possible: [www.manpowergroup.com](http://www.manpowergroup.com).

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