

**Manpower  
Employment  
Outlook Survey  
United States**

**Q4  
2015**



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 October and December 2015. 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 December 2015 as compared to the current quarter?”

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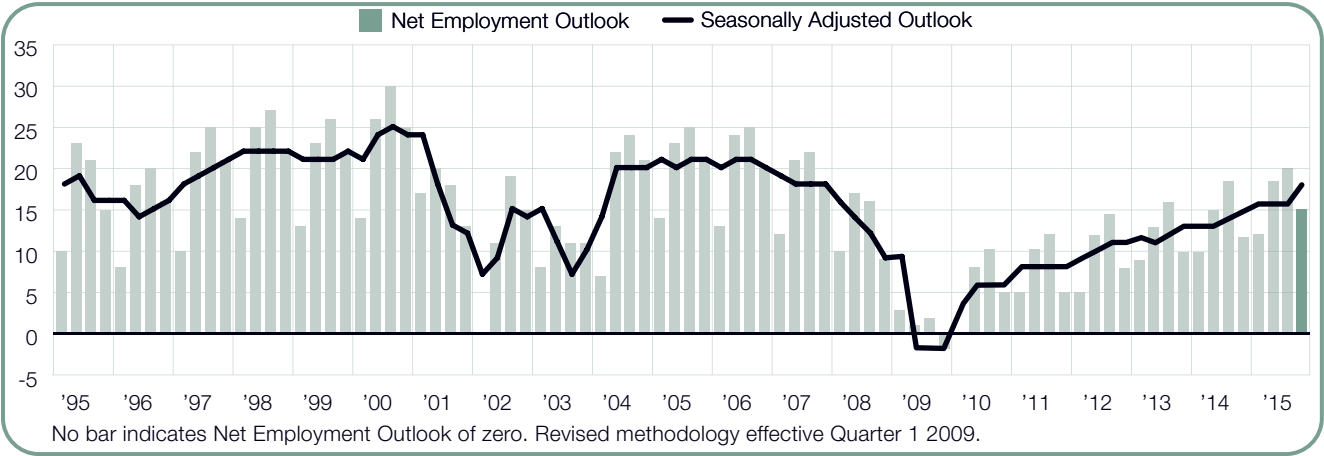
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# United States Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Quarter 4 2015</b>	<b>21</b>	<b>6</b>	<b>71</b>	<b>2</b>	<b>15</b>	<b>18</b>
Quarter 3 2015	24	4	70	2	20	16
Quarter 2 2015	22	4	72	2	18	16
Quarter 1 2015	19	6	73	2	13	16
Quarter 4 2014	19	7	72	2	12	15



Among U.S. employers surveyed, 21 percent expect to add to their workforces, and 6 percent expect a decline in their payrolls during Quarter 4 2015. Seventy-one percent of employers anticipate making no change to staff levels, and the remaining 2 percent of employers are undecided about their Quarter 4 2015 hiring plans.

When seasonal variations are removed from the data, the Net Employment Outlook is +18%. Hiring intentions are slightly stronger compared to Quarter 3 2015 and to one year ago at this time.

All four U.S. regions surveyed report a positive Net Employment Outlook. When seasonal variations are removed from the data, employers in the Midwest, South and West regions report the strongest Outlook at +17%. Quarter over quarter, employers in all four regions expect a relatively stable hiring pace. Compared to one year ago at this time, employers in the West foresee relatively stable hiring for Quarter 4 2015. Employers in the Midwest and South expect a slight increase in the hiring pace, while employers in the Northeast report a moderate uptick in hiring plans.

*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 percent due to rounding.*

# Industry Sector Comparisons

For Quarter 4 2015, employers have a positive Outlook in all 13 industry sectors included in the survey: Leisure & Hospitality (+27%), Wholesale & Retail Trade (+21%), Professional & Business Services (+20%), Transportation & Utilities (+20%), Construction (+17%), Financial Activities (+17%), Government (+14%), Durable Goods Manufacturing (+13%), Education & Health Services (+13%), Nondurable Goods Manufacturing (+13%), Information (+12%), Other Services (+8%) and Mining (+4%).

When the industry sector data is compared quarter over quarter, employers in the Mining sector anticipate a considerable increase in job prospects, and Financial Activities employers expect a moderate increase.

Construction, Nondurable Goods Manufacturing, Professional & Business Services and Transportation & Utilities industry sector employers expect the hiring pace to slightly increase.

Employers in five industry sectors expect relatively stable staff levels: Durable Goods Manufacturing, Education & Health Services, Government, Information and Leisure & Hospitality.

Employers in the Other Services and Wholesale & Retail Trade industry sectors expect hiring to decrease slightly.

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 Q4 2015	Seasonally Adjusted
	%	%	%	%	%	%
Construction	20	7	70	3	13	17
Education & Health Services	18	4	76	2	14	13
Financial Activities	19	3	76	2	16	17
Government	16	6	75	3	10	14
Information	15	5	78	2	10	12
Leisure & Hospitality	31	10	57	2	21	27
Manufacturing - Durable Goods	19	8	71	2	11	13
Manufacturing - Nondurable Goods	17	6	75	2	11	13
Mining	13	12	73	2	1	4
Other Services	10	5	84	1	5	8
Professional & Business Services	22	5	72	1	17	20
Transportation & Utilities	24	5	69	2	19	20
Wholesale & Retail Trade	27	5	66	2	22	21

# Regional Comparisons

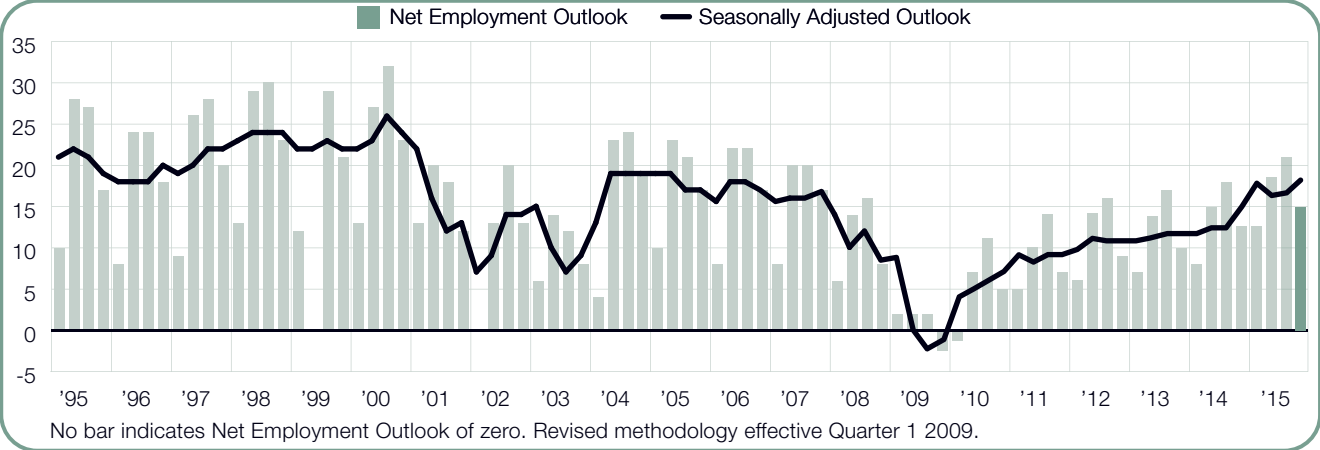
**+17 (+15)%**

## Midwest

In the Midwest, 21 percent of employers surveyed expect to increase staff levels for Quarter 4 2015 and 6 percent anticipate reduced headcounts, resulting in a Net Employment Outlook of +15%. When seasonal variations are removed from the data, the Outlook for Quarter 4 2015 is relatively stable compared to Quarter 3 2015 and increases slightly compared to one year ago at this time.

Quarter over quarter, Leisure & Hospitality employers in the Midwest expect a considerable increase in the hiring pace, while Nondurable Goods Manufacturers report a moderate increase in staffing plans. Among Midwest employers, hiring plans are slightly stronger for Quarter 4 2015 compared to Quarter 3 2015 in three of the industry sectors surveyed: Construction, Financial Activities and Professional & Business Services. Employers in the Information, Other Services and Transportation & Utilities industry sectors expect relatively stable hiring.

Employers in three industry sectors expect the hiring pace to decrease slightly: Education & Health Services, Government and Durable Goods Manufacturing. Wholesale & Retail Trade employers expect a moderate decrease in hiring activity.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2015	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries - Midwest</b>	<b>21</b>	<b>6</b>	<b>72</b>	<b>1</b>	<b>15</b>	<b>17</b>
Construction	21	6	70	3	15	22
Education & Health Services	17	6	75	2	11	10
Financial Activities	21	1	76	2	20	20
Government	10	7	81	2	3	7
Information	10	4	84	2	6	7
Leisure & Hospitality	37	10	53	0	27	34
Manufacturing - Durable Goods	24	12	62	2	12	14
Manufacturing - Nondurable Goods	20	2	77	1	18	20
Other Services	11	3	84	2	8	9
Professional & Business Services	21	3	74	2	18	20
Transportation & Utilities	18	3	78	1	15	18
Wholesale & Retail Trade	26	6	67	1	20	19

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

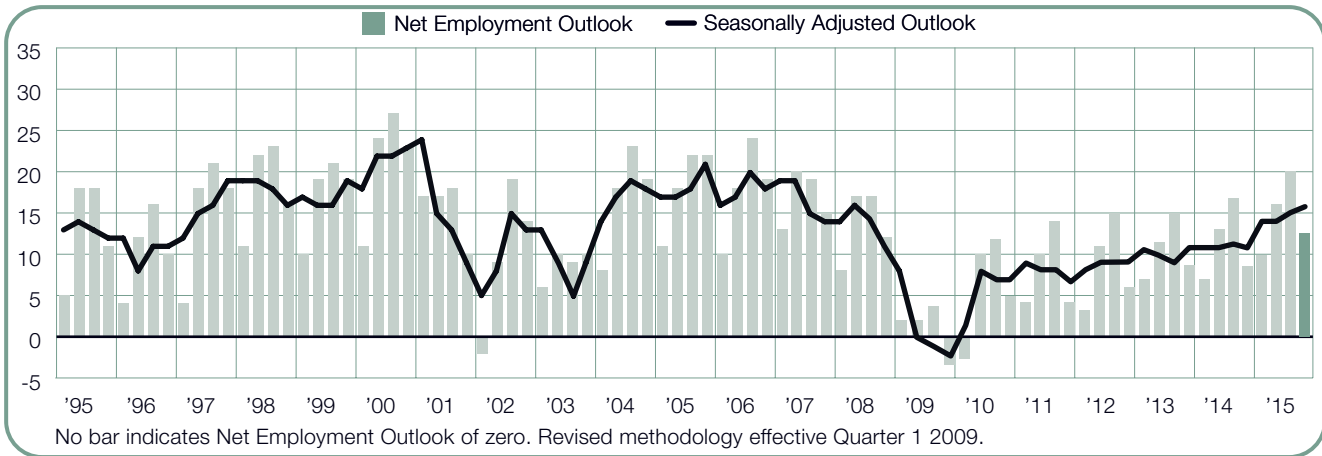
**+16 (+13)%**

## Northeast

In the Northeast, 19 percent of employers indicate plans to increase staff levels, while 6 percent expect to decrease payrolls, resulting in a Net Employment Outlook of +13% for Quarter 4 2015. According to seasonally adjusted survey results, employers anticipate relatively stable hiring plans compared to Quarter 3 2015, and a moderate increase from one year ago at this time.

Compared to Quarter 3 2015 survey results, employers in Nondurable Goods Manufacturing expect a considerable increase in hiring, while employers in Financial Activities, Transportation & Utilities and Wholesale & Retail Trade foresee a moderate increase. Employers in the Education & Health Services and Leisure & Hospitality industry sectors expect a slight increase in the hiring pace for Quarter 4 2015. Employers in Government expect hiring to remain relatively stable.

Employers in three industry sectors report a slight decrease in hiring intentions for Quarter 4 2015: Durable Goods Manufacturing, Other Services and Professional & Business Services. Construction employers anticipate a moderate decrease in the hiring pace, and Information employers anticipate a considerable decrease.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2015	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries - Northeast</b>	<b>19</b>	<b>6</b>	<b>72</b>	<b>3</b>	<b>13</b>	<b>16</b>
Construction	15	11	72	2	4	10
Education & Health Services	15	3	80	2	12	11
Financial Activities	20	1	75	4	19	21
Government	11	5	80	4	6	9
Information	7	8	80	5	-1	1
Leisure & Hospitality	26	14	58	2	12	23
Manufacturing - Durable Goods	15	6	79	0	9	13
Manufacturing - Nondurable Goods	22	5	72	1	17	19
Other Services	7	8	85	0	-1	3
Professional & Business Services	21	7	71	1	14	17
Transportation & Utilities	30	4	63	3	26	26
Wholesale & Retail Trade	31	4	62	3	27	26

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

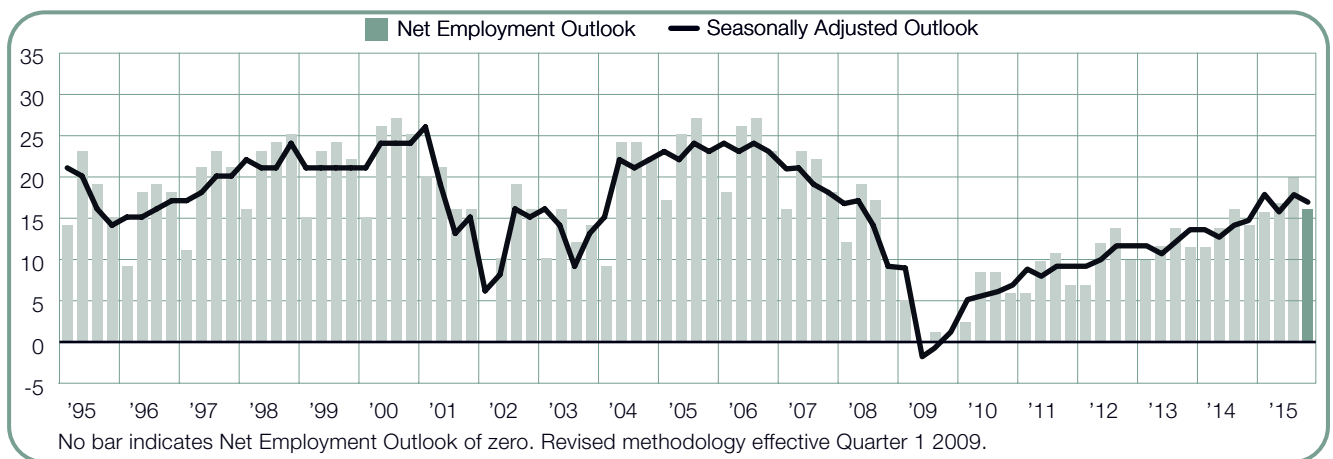
**+17 (+16)%**

## South

In the South, 22 percent of employers surveyed expect to increase staff levels and 6 percent plan to decrease their employee headcounts, resulting in a Net Employment Outlook of +16%. When seasonal variations are removed from the data, hiring plans are relatively stable compared to last quarter and improve slightly compared to Quarter 4 2014.

Quarter over quarter, Durable Goods Manufacturers report a considerable increase in hiring plans. A slight improvement in job prospects is expected in Construction, Financial Activities, Information and Transportation & Utilities. Employers in the Government and Other Services industry sectors report relatively stable hiring expectations.

Employers in the Education & Health Services, Nondurable Goods Manufacturing, Professional & Business Services and Wholesale & Retail Trade industry sectors anticipate a slight weakening of the hiring pace, while Leisure & Hospitality employers expect a moderate decline.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2015	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries - South</b>	<b>22</b>	<b>6</b>	<b>71</b>	<b>1</b>	<b>16</b>	<b>17</b>
Construction	19	8	71	2	11	14
Education & Health Services	18	5	74	3	13	13
Financial Activities	17	2	80	1	15	15
Government	20	4	74	2	16	19
Information	19	4	76	1	15	17
Leisure & Hospitality	33	10	55	2	23	27
Manufacturing - Durable Goods	22	7	68	3	15	16
Manufacturing - Nondurable Goods	16	9	73	2	7	9
Other Services	11	4	84	1	7	9
Professional & Business Services	21	4	73	2	17	19
Transportation & Utilities	21	7	70	2	14	17
Wholesale & Retail Trade	26	4	68	2	22	20

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

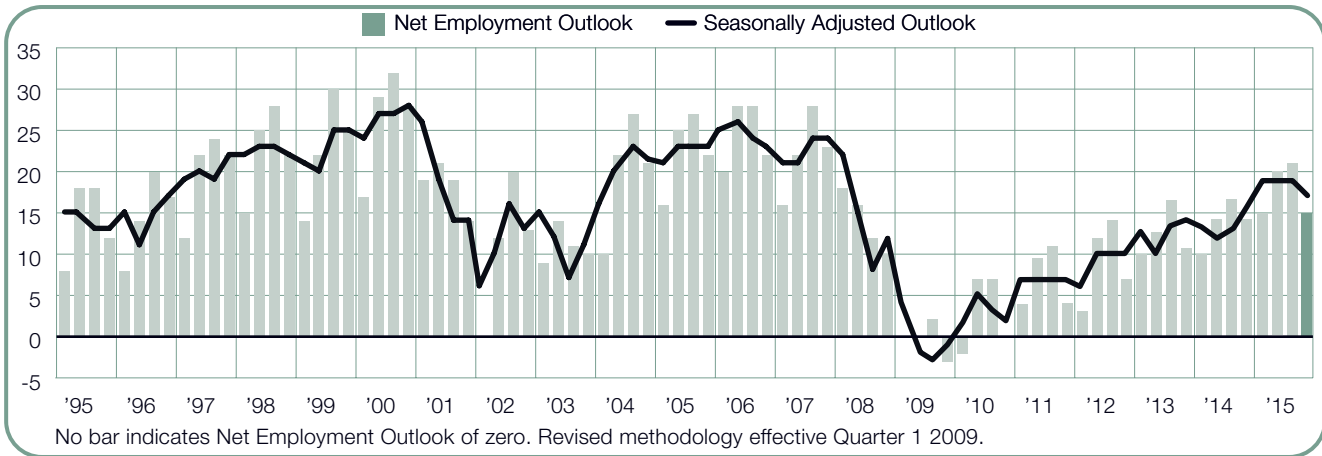
**+17 (+15)%**

## West

Among employers surveyed in the West, 22 percent plan to add staff, while 7 percent anticipate a decline in payrolls, resulting in a Net Employment Outlook of +15% for Quarter 4 2015. According to seasonally adjusted survey results, employers in the West anticipate a relatively stable hiring pace compared to Quarter 3 2015 and to one year ago at this time.

Construction employers expect a moderate improvement in job prospects during Quarter 4 2015 compared to Quarter 3 2015, and employers in the Professional & Business Services and Transportation & Utilities industry sectors anticipate a slight increase in the hiring pace.

Employers in three industry sectors report relatively stable hiring plans: Education & Health Services, Financial Activities and Government. Employers in the Durable and Nondurable Manufacturing, Information, Leisure & Hospitality and Wholesale & Retail Trade industry sectors expect staff levels to decrease slightly, while employers in Other Services foresee a moderate decline in the hiring pace.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2015	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries - West</b>	<b>22</b>	<b>7</b>	<b>70</b>	<b>1</b>	<b>15</b>	<b>17</b>
Construction	25	7	66	2	18	22
Education & Health Services	21	3	74	2	18	17
Financial Activities	21	6	72	1	15	14
Government	19	10	68	3	9	15
Information	18	4	76	2	14	15
Leisure & Hospitality	27	9	63	1	18	25
Manufacturing - Durable Goods	15	9	74	2	6	9
Manufacturing - Nondurable Goods	13	7	77	3	6	7
Other Services	10	6	83	1	4	6
Professional & Business Services	23	7	70	0	16	19
Transportation & Utilities	28	5	67	0	23	24
Wholesale & Retail Trade	26	7	65	2	19	20

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 4 2015, 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 Q4 2015	Metropolitan Statistical Areas
<b>34%</b>	McAllen, Edinburg, Mission
<b>27%</b>	Greenville, Mauldin, Easley, Stockton, Lodi
<b>26%</b>	Tampa, St. Petersburg, Clearwater
<b>25%</b>	Cape Coral, Fort Myers
<b>24%</b>	Dayton, Indianapolis, Carmel
<b>23%</b>	Minneapolis, St. Paul, Bloomington, Phoenix, Mesa, Scottsdale, Richmond
<b>22%</b>	El Paso, San Jose, Sunnyvale, Santa Clara
<b>21%</b>	Austin, Round Rock, Charleston, North Charleston, Summerville, Columbus, Grand Rapids, Wyoming, Omaha, Council Bluffs, Salt Lake City, San Francisco, Oakland Fremont, Tucson
<b>20%</b>	Columbia, Des Moines, West Des Moines, Harrisburg, Carlisle, Houston, Sugar Land, Baytown, Milwaukee, Waukesha, West Allis, Virginia Beach, Norfolk-Newport News, Wichita
<b>19%</b>	Deltona, Daytona Beach, Ormond Beach, Knoxville, Miami, Fort Lauderdale, Pompano Beach, Nashville, Davidson, Murfreesboro, Franklin, Sacramento, Arden, Arcade, Roseville, Seattle, Tacoma, Bellevue
<b>18%</b>	Greensboro, High Point, Hartford, West Hartford, East Hartford, Provo, Orem, San Antonio
<b>17%</b>	Denver, Aurora, North Port, Bradenton, Sarasota, Scranton, Wilkes-Barre
<b>16%</b>	Cincinnati, Middletown, Cleveland, Elyria, Mentor, Honolulu, Jackson, Las Vegas, Paradise, Louisville, Jefferson County, Portland, Vancouver, Beaverton, Riverside, San Bernardino, Ontario
<b>15%</b>	Bakersfield, Charlotte, Gastonia, Concord, New Haven, Milford, Oklahoma City, Orlando, Kissimmee, Philadelphia, Camden, Wilmington, San Diego, Carlsbad, San Marcos
<b>14%</b>	Baton Rouge, Birmingham, Hoover, Boise City, Nampa, Bridgeport, Stamford, Norwalk, Jacksonville, Memphis, Oxnard, Thousand Oaks, Ventura, Palm Bay, Melbourne, Titusville, Pittsburgh, Spokane, Washington, Arlington, Alexandria
<b>13%</b>	Rochester, Springfield, Tulsa, Winston-Salem
<b>12%</b>	Albuquerque, Baltimore, Towson, Boston, Cambridge, Quincy, Buffalo, Niagara Falls, Dallas, Fort Worth, Arlington, Detroit, Warren, Livonia, Raleigh, Cary
<b>11%</b>	Chattanooga, Madison, New Orleans, Metairie, Kenner, Providence, New Bedford, Fall River, Syracuse
<b>10%</b>	Albany, Schenectady, Troy, Kansas City, Toledo, Worcester
<b>9%</b>	Allentown, Bethlehem, Easton, Atlanta, Sandy Springs, Marietta, Augusta, Richmond County, Colorado Springs, Fresno, Lakeland, Winter Haven
<b>8%</b>	Chicago, Naperville, Joliet
<b>6%</b>	Akron, Little Rock, North Little Rock, Conway, New York, Northern New Jersey, Long Island
<b>5%</b>	St. Louis
<b>4%</b>	Los Angeles, Long Beach, Santa Ana
<b>3%</b>	Ogden, Clearfield, Youngstown, Warren, Boardman

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

# Global Employment Outlook

ManpowerGroup interviewed nearly 59,000 employers across 42 countries and territories to forecast Quarter 4 2015 labor market activity.\* All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of December 2015 as compared to the current quarter?”

Employers in 36 of 42 countries and territories intend to add to their payrolls by varying margins during the October-December time frame. However, evidence of definitive fourth-quarter workforce gains remains patchy amid signs that the pace of recovery following the recession continues to be slow and protracted. Many employers continue to exercise caution and are refraining from aggressive hiring until they sense more meaningful indicators of a market upturn.

Employers in India and Taiwan report the strongest hiring plans across the globe, while employer confidence in Japan is growing steadily with job seekers likely to benefit from the most optimistic forecast reported since Quarter 1 2008. Similarly, hiring intentions in the U.S. continue to improve, and the current outlook is the strongest reported since Quarter 4 2007.

Conversely, employer optimism continues to dwindle in Brazil; the fourth-quarter forecast is the weakest among the 42 countries and territories participating in the survey, and sinks to its least optimistic level since the survey was launched. Labor market activity is also slowing in China where employers forecast the weakest hiring environment in more than six years. Meanwhile, the forecast remains negative in Italy, and turns negative again in Greece, France and Finland.

Overall, employer optimism is mixed in comparison to the Quarter 3 2015 and Quarter 4 2014 research. Forecasts improve in a quarter-over-quarter comparison in 15 countries and territories, decline in 20 and are unchanged in seven. When compared year-over-year, forecasts improve in 16 countries, decline in 21, and are unchanged in five.

In the Europe, Middle East & Africa (EMEA) region, workforce gains are expected by employers in 19 of 24 countries. In a quarter-over-quarter comparison, opportunities for job seekers are expected to be stronger in seven countries and weaker in 12. When compared to Quarter 4 2014, employer confidence is stronger in 12 countries and weaker in nine.

Furthermore, among those countries where payroll growth is forecast, expected gains are mostly modest with employer optimism apparently tempered—at least in part—by issues associated with the most recent Greek debt crisis. The region’s most active hiring pace is forecast in Romania, while Italian employers again report the region’s weakest year-end hiring plans.

Payrolls are expected to increase in all eight Asia Pacific countries and territories. However, Outlooks are trending weaker and the hiring pace is expected to strengthen in only three of eight countries and territories quarter-over-quarter and improve in only one in a year-over-year comparison. Employers in India report the most optimistic forecast across the globe. Conversely, the region’s weakest forecast is reported by mainland Chinese employers where hiring activity dips to its weakest point since Quarter 3 2009, following quarter-over-quarter and year-over-year declines in all regions and in most industry sectors.

Of the 10 countries surveyed in the Americas, positive Outlooks are reported in nine. Hiring confidence strengthens in five countries and declines in four when compared to the July-September time frame. In a year-over-year comparison, forecasts strengthen in only three countries and decline in six. U.S. employers report the strongest fourth-quarter hiring plans. In contrast, employers in Brazil anticipate the weakest hiring pace, with negative forecasts reported by employers in all but one industry sector and in all regions.

Full survey results for each of the 42 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 December 8, 2015 and will detail expected labor market activity for the first quarter of 2016.

\* Commentary is based on seasonally adjusted data where available. Data is not seasonally adjusted in Finland.

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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 42 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 4Q 2015 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 December 2015 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, Slovakia and Israel. 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.

## About ManpowerGroup™

ManpowerGroup® (NYSE: MAN) is the world's workforce expert, creating innovative workforce solutions for more than 65 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 2015, ManpowerGroup was named one of the World's Most Ethical Companies for the fifth 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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