

**Manpower  
Employment  
Outlook Survey  
United States**

**Q4  
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 October and December 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 December 2016 compared to the current quarter?”

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# United States Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Quarter 4 2016</b>	<b>22</b>	<b>6</b>	<b>69</b>	<b>3</b>	<b>16</b>	<b>18</b>
Quarter 3 2016	23	5	71	1	18	15
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



For the final quarter of 2016, 22 percent of U.S. employers surveyed expect an increase in staffing levels, while 6 percent anticipate a decrease in payrolls. No change in hiring activity is expected by 69 percent of employers.

Once the data is adjusted to allow for seasonal variation, the U.S. Net Employment Outlook stands at +18%. Hiring plans nationwide improve by 3 percentage points quarter-over-quarter and are unchanged when compared with Quarter 4 2015.

Net Employment Outlooks strengthen in all four U.S. regions surveyed when compared with Quarter 3 2016 when seasonal variations are removed from the data. Improvements of 2 percentage points are reported in the Northeast, the South and the West. Meanwhile, the Outlook for the Midwest is 1 percentage point

stronger. The strongest labor market is anticipated in the West where employers report a Net Employment Outlook of +19%. The Outlook for the South is +18%. Employers in both the Midwest and the Northeast report Outlooks of +16%.

Hiring prospects are slightly stronger in the Northeast, the South and the West when compared with Quarter 3 2016. In the Midwest, the Outlook remains relatively stable. Compared to one year ago at this time, hiring plans are slightly stronger in the West and remain relatively stable in the Midwest, the Northeast and the South.

From this point forward, all data discussed in the commentary is seasonally adjusted, unless stated otherwise.

*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

Nationwide, employers in all 13 industry sectors expect payrolls to increase during Quarter 4 2016, based on seasonally adjusted figures: Leisure & Hospitality (+30%), Wholesale & Retail Trade (+22%), Transportation & Utilities (+20%), Professional & Business Services (+17%), Government (+15%), Nondurable Goods Manufacturing (+15%), Construction (+14%), Financial Activities (+14%), Information (+14%), Education & Health Services (+13%), Durable Goods Manufacturing (+11%), Other Services (+10%) and Mining (+6%).

When compared to Quarter 3 2016, Mining sector employers across the U.S. anticipate a considerable increase in hiring. Moderately stronger hiring activity is expected by employers in the Leisure & Hospitality

sector while slightly stronger hiring prospects are reported for Government, Financial Activities and Wholesale & Retail Trade sectors.

Relatively stable hiring plans are reported nationwide for the following sectors: Construction, Information, Nondurable Goods Manufacturing, Other Services, Transportation & Utilities, Education & Health and Professional & Business Services.

Staffing levels are expected to decline slightly in the Durable Goods Manufacturing sector when compared with Quarter 3 2016.

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 Q4 2016 %	Seasonally Adjusted %
Construction	18	8	72	2	10	14
Education & Health Services	19	4	74	3	15	13
Financial Activities	18	3	76	3	15	14
Government	19	7	72	2	12	15
Information	17	5	73	5	12	14
Leisure & Hospitality	33	10	54	3	23	30
Manufacturing – Durable Goods	16	6	76	2	10	11
Manufacturing – Nondurable Goods	20	6	70	4	14	15
Mining	13	8	74	5	5	6
Other Services	13	7	79	1	6	10
Professional & Business Services	22	8	68	2	14	17
Transportation & Utilities	25	6	67	2	19	20
Wholesale & Retail Trade	28	5	65	2	23	22

# Regional Comparisons

**+14 (+16)%**

## Midwest

Employers in 20% of Midwest businesses surveyed anticipate an increase in payrolls during Quarter 4 2016, with 6% of employers expecting a decline in staffing levels. As a result, the Net Employment Outlook is +14%. When seasonal adjustments are removed from the data, hiring intentions remain relatively stable both quarter-over-quarter and year-over-year.

Compared with Quarter 3 2016, Midwest employers in the Transportation & Utilities and Leisure & Hospitality industry sectors report a considerable improvement in hiring prospects, and Government sector employers report slightly stronger hiring plans.

Hiring is expected to remain relatively stable in five Midwest sectors: Construction, Education & Health Services, Durable Goods Manufacturing, Wholesale & Retail Trade and Financial Activities.

Job seekers in three sectors can expect slightly weaker hiring prospects in Quarter 4 2016: Information, Other Services and Professional & Business Services. Meanwhile, moderately weaker hiring intentions are reported by employers in the Nondurable Goods Manufacturing sector.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2016	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Midwest</b>	<b>20</b>	<b>6</b>	<b>71</b>	<b>3</b>	<b>14</b>	<b>16</b>
Construction	16	12	70	2	4	10
Education & Health Services	16	3	80	1	13	12
Financial Activities	13	2	82	3	11	11
Government	14	7	75	4	7	12
Information	11	4	84	1	7	8
Leisure & Hospitality	37	11	50	2	26	32
Manufacturing – Durable Goods	17	6	74	3	11	13
Manufacturing – Nondurable Goods	21	6	69	4	15	17
Other Services	13	7	77	3	6	8
Professional & Business Services	22	9	68	1	13	16
Transportation & Utilities	26	7	67	0	19	21
Wholesale & Retail Trade	26	4	70	0	22	21

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

**+13 (+16)%**

## Northeast

In the Northeast, 20% of employers surveyed anticipate stronger hiring activity in Quarter 4 2016. With 7% of employers expecting a decline in staffing levels, the Net Employment Outlook is +13%. Once the data is adjusted to allow for seasonal variation, hiring prospects improve slightly when compared with the previous quarter, while employers report no change year-over-year.

Moderately stronger hiring prospects are reported in three Northeast industry sectors when compared with Quarter 3 2016: Nondurable Goods Manufacturing, Information and Leisure & Hospitality. Slight payroll gains are also anticipated in the Government, Wholesale & Retail Trade and Construction sectors.

Employers in four industry sectors expect relatively stable hiring activity compared with the previous quarter: Education & Health Services, Financial Activities, Other Services and Durable Goods Manufacturing.

Moderately weaker quarter-over-quarter hiring intentions are reported by employers in two sectors—Transportation & Utilities and Professional & Business Services.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2016	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Northeast</b>	<b>20</b>	<b>7</b>	<b>70</b>	<b>3</b>	<b>13</b>	<b>16</b>
Construction	11	8	79	2	3	9
Education & Health Services	18	3	76	3	15	14
Financial Activities	16	2	80	2	14	13
Government	15	9	72	4	6	9
Information	21	7	67	5	14	16
Leisure & Hospitality	29	14	55	2	15	26
Manufacturing – Durable Goods	15	6	76	3	9	12
Manufacturing – Nondurable Goods	20	4	73	3	16	16
Other Services	9	10	80	1	-1	4
Professional & Business Services	19	9	70	2	10	16
Transportation & Utilities	22	5	70	3	17	17
Wholesale & Retail Trade	28	5	65	2	23	20

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

**+17 (+18)%**

## South

Employers in 22% of surveyed businesses based in the South expect to increase employment levels during Quarter 4 2016, while 5% anticipate a decline in payrolls. As a result, the Net Employment Outlook is +17%. When seasonal variations are removed from the data, hiring intentions are slightly stronger compared with Quarter 3 2016 and remain relatively stable year-over-year.

Employers in the South of the U.S. report moderately stronger hiring intentions in the Construction industry sector when compared with Quarter 3 2016. Slightly stronger hiring prospects are reported in seven sectors: Government, Education & Health Services, Leisure & Hospitality, Nondurable Goods Manufacturing, Financial Activities, Professional & Business Services and Transportation & Utilities.

Relatively stable labor markets are reported in three industry sectors when compared with the previous quarter: Other Services, Durable Goods Manufacturing and Wholesale & Retail Trade.

The Outlook for the Information industry sector in the South is slightly weaker when compared with Quarter 3 2016, according to employers.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2016	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – South</b>	<b>22</b>	<b>5</b>	<b>69</b>	<b>4</b>	<b>17</b>	<b>18</b>
Construction	20	6	71	3	14	17
Education & Health Services	19	4	75	2	15	14
Financial Activities	20	3	73	4	17	16
Government	20	5	73	2	15	17
Information	17	5	71	7	12	15
Leisure & Hospitality	33	7	57	3	26	30
Manufacturing – Durable Goods	18	6	75	1	12	13
Manufacturing – Nondurable Goods	19	5	72	4	14	16
Other Services	13	5	80	2	8	9
Professional & Business Services	25	7	65	3	18	20
Transportation & Utilities	23	6	69	2	17	20
Wholesale & Retail Trade	26	6	66	2	20	19

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.

**+17 (+19)%**

## West

In Quarter 4 2016, employers in 24% of businesses surveyed in the West of the U.S expect payrolls to grow. With 7% of employers anticipating a decline in employment levels, the Net Employment Outlook is +17%. When seasonal adjustment is applied to the data, hiring intentions are slightly stronger both quarter-over-quarter and year-over-year.

Employers in the Wholesale & Retail Trade industry sector report a considerable increase in hiring activity when compared with Quarter 3 2016. Moderately stronger hiring prospects are reported for the Nondurable Goods Manufacturing sector, while Outlooks improve slightly in four sectors: Leisure & Hospitality, Education & Health Services, Government and Information.

Job seekers in four industry sectors can expect little change in hiring prospects, with employers reporting relatively stable Outlooks compared to Quarter 3 2016: Durable Goods Manufacturing, Financial Activities, Professional & Business Services and Transportation & Utilities.

A slight decline in staffing levels is expected in the Construction sector when compared with the previous quarter, while employers in the Other Services sector report moderately weaker hiring prospects.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2016	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – West</b>	<b>24</b>	<b>7</b>	<b>66</b>	<b>3</b>	<b>17</b>	<b>19</b>
Construction	19	7	70	4	12	17
Education & Health Services	23	4	68	5	19	17
Financial Activities	19	5	75	1	14	14
Government	24	7	67	2	17	23
Information	22	6	68	4	16	16
Leisure & Hospitality	33	12	51	4	21	27
Manufacturing – Durable Goods	12	7	78	3	5	9
Manufacturing – Nondurable Goods	22	9	65	4	13	15
Other Services	13	6	79	2	7	11
Professional & Business Services	20	9	69	2	11	14
Transportation & Utilities	27	7	63	3	20	20
Wholesale & Retail Trade	31	5	60	4	26	28

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 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 Q4 2016	Metropolitan Statistical Areas
33%	Honolulu
31%	Provo
29%	Miami, Raleigh
27%	Charleston, Nashville
25%	Cape Coral
24%	Richmond, Riverside
23%	McAllen, Orlando
22%	Denver, Memphis, Phoenix, Sacramento
21%	Chattanooga, Deltona, North Port, Stockton, Toledo
20%	Albany, Cincinnati, Portland, Providence, St. Louis
19%	Augusta, Minneapolis, San Antonio, San Jose, Tucson
18%	Allentown, Dallas, Dayton, Greenville, Jacksonville, Lakeland, Salt Lake City, Washington
17%	Colorado Springs, Columbia, Fresno, Greensboro, Milwaukee, San Francisco, Tampa
16%	Baltimore, Baton Rouge, Bridgeport, Columbus, Harrisburg, Knoxville, Louisville
15%	Atlanta, Detroit, El Paso, Houston, Little Rock, Ogden, Omaha, San Diego, Spokane, Syracuse
14%	Birmingham, Boston, Grand Rapids, Las Vegas, New Haven, Scranton, Winston-Salem
13%	Akron, Charlotte, Los Angeles, Palm Bay, Rochester, Springfield, Tulsa
12%	Albuquerque, Bakersfield, Boise City, Chicago, Madison, Virginia Beach
11%	Des Moines, Jackson, Oxnard
10%	Cleveland
9%	Austin, New York, Wichita, Youngstown
8%	Hartford, New Orleans, Pittsburgh
7%	Indianapolis, Philadelphia
6%	Buffalo, Kansas City, Worcester
4%	Oklahoma City, Seattle

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 4 2016. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of December 2016 as compared to the current quarter?”

Staffing levels are expected to grow by varying degrees in 42 of 43 countries and territories through the end of the year. Only employers in Brazil expect payrolls to decline in the October-December time frame. Uncertainty associated with the slowdown of the global economy, the Brexit referendum and continued financial market volatility appears to have had little impact on employer hiring confidence. Slightly more than half of the forecasts strengthen by varying margins when compared to results reported three months ago, with hiring plans improving in 23 of 43 countries and territories, remaining unchanged in nine, and declining in 11. Outlooks improve in 21 countries and territories when compared with Quarter 4 2015, are unchanged in six, and decline in 15. Hiring confidence is strongest in India, Japan, Taiwan and the United States, while employers in Brazil, Belgium, Finland, Italy and Switzerland report the weakest hiring plans.

In the Americas region, fourth-quarter workforce gains are expected in nine of 10 countries. However, employer confidence is mixed when compared to prior reports with forecasts improving by varying margins in five countries in comparison to the July-September period, declining in three and remaining unchanged in two. When compared to Quarter 4 2015, forecasts weaken in five countries, strengthen in two, and are unchanged in three. Employers in the United States, Colombia and Mexico report the region’s most optimistic fourth-quarter hiring plans, while opportunities for job seekers are expected to be weakest in Brazil.

Employers in all 25 countries in the Europe, Middle East & Africa (EMEA) region expect some level of staffing level growth over the next three months. In a quarter-over-quarter comparison, forecasts improve in 12 countries, weaken in six and are unchanged in seven. When compared year-over-year, job prospects are expected to improve in 16 countries, decline in six and remain unchanged in two. Employers in Ireland and Israel report the region’s strongest fourth-quarter hiring plans, while the weakest outlooks are reported in Belgium, Finland, Italy and Switzerland. As was the case in the third-quarter report, employers in each of the EMEA region’s 25 countries expect varying degrees of positive hiring activity.

Job gains are expected in all eight countries and territories surveyed in the Asia Pacific region. Hiring plans improve in six countries & territories in comparison to Quarter 3 2016 and decline in only two. However, fourth-quarter forecasts weaken in four countries and territories when compared year-over-year, improve in three and are unchanged in one. For the fifth consecutive quarter, employers in India report the most optimistic regional and global hiring plans. China’s forecast improves slightly from three months ago, but employers here again report the region’s weakest fourth-quarter hiring plans.

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 December 2016 and will detail expected labor market activity for the first quarter of 2017.

\* Commentary is based on seasonally adjusted data where available. Finland’s data is seasonally adjusted for the first time in the Quarter 4 2016 report. Data for Portugal is not seasonally adjusted, but will be once 17 quarters of Portuguese data are accumulated. Portugal joined the survey in Quarter 3 2016 and has no year-over-year 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 4 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 December 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 Portugal. ManpowerGroup intends to add seasonal adjustments to the Portuguese data 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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