

**ManpowerGroup  
Employment  
Outlook Survey  
United States**

**Q2  
2017**



ManpowerGroup®

# United States Employment Outlook

More than 11,000 interviews were 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 April and June 2017. 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 June 2017 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 2 2017</b>	<b>22</b>	<b>3</b>	<b>73</b>	<b>2</b>	<b>19</b>	<b>17</b>
Quarter 1 2017	19	6	73	2	13	16
Quarter 4 2016	22	6	69	3	16	18
Quarter 3 2016	23	5	71	1	18	15
Quarter 2 2016	22	4	72	2	18	16



In the April-June 2017 period, 22 percent of U.S. employers expect to grow payrolls, while 3 percent expect a decline in staffing levels. In addition, 73 percent of U.S. employers anticipate no change in employment levels.

Once the data is adjusted to allow for seasonal variation, the Net Employment Outlook for the U.S. stands at +17%. Nationwide, hiring prospects remain relatively stable when compared with the first quarter of 2017, and are also relatively stable when compared with Quarter 2 2016.

Employers in two of the four U.S. regions report stronger hiring intentions when compared with the previous quarter, on the basis of seasonally adjusted analysis. Net Employment Outlooks are 1 percentage point stronger in both the Midwest and the South. However, the Net Employment Outlook for the Northeast declines by 2 percentage points. In the

West, employers report no quarter-over-quarter change. The strongest level of hiring activity is expected in the West, where employers report a Net Employment Outlook of +18%, while employers in the South report an Outlook of +17%. Outlooks stand at +16% and +15% in the Midwest and the Northeast, respectively.

When compared with the first quarter of 2017, hiring prospects are slightly weaker in the Northeast but remain relatively stable in the Midwest and the South, while employers report no change in the West. Compared to this time one year ago, the Outlook in the West is slightly stronger. In the Midwest, employers report relatively stable hiring plans year-over-year, while there is no change in hiring prospects in both 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

Staffing levels are expected to increase in all 13 national industry sectors during the next three months, based on seasonally adjusted analysis:

Leisure & Hospitality (+28%), Wholesale & Retail Trade (+21%), Transportation & Utilities (+20%), Professional & Business Services (+19%), Financial Activities (+17%), Mining (+16%), Nondurable Goods Manufacturing (+16%), Construction (+15%), Government (+14%), Education & Health Services (+13%), Durable Goods Manufacturing (+12%), Information (+11%) and Other Services (+8%).

When compared with the first quarter of 2017, hiring intentions across the U.S. are considerably stronger in the Mining sector, where the Outlook is the strongest in

more than two years. Employers in two sectors report slightly stronger hiring prospects: Nondurable Goods Manufacturing and Professional & Business Services.

Nationwide, employers in the following sectors report relatively stable hiring intentions: Construction, Education & Health Services, Financial Activities, Government, Leisure & Hospitality, Other Services, Transportation & Utilities and Wholesale & Retail Trade.

Hiring plans are slightly weaker in two national industry sectors when compared with the previous quarter: Information and Durable Goods Manufacturing.

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 Q2 2017 %	Seasonally Adjusted %
Construction	23	3	71	3	20	15
Education & Health Services	16	3	79	2	13	13
Financial Activities	20	3	76	1	17	17
Government	19	3	75	3	16	14
Information	15	3	80	2	12	11
Leisure & Hospitality	34	4	60	2	30	28
Manufacturing – Durable Goods	19	4	75	2	15	12
Manufacturing – Nondurable Goods	20	3	75	2	17	16
Mining	24	3	72	1	21	16
Other Services	13	3	83	1	10	8
Professional & Business Services	24	3	72	1	21	19
Transportation & Utilities	26	3	70	1	23	20
Wholesale & Retail Trade	23	4	71	2	19	21

# Regional Comparisons

**+18 (+16)%**

## Midwest

Employers in 21 percent of the Midwest businesses surveyed expect to increase staffing levels during the second quarter of 2017, while 3 percent expect a decline in payrolls. The resulting Net Employment Outlook is +18%. Once the data is adjusted to allow for seasonal variation, hiring prospects in the region remain relatively stable both quarter-over-quarter and year-over-year.

Midwest employers in the Nondurable Goods Manufacturing sector report considerably stronger hiring intentions when compared with the previous quarter. Hiring prospects are moderately stronger in both the Financial Activities and Transportation & Utilities sectors, while Midwest employers report slightly stronger hiring intentions in the Construction, Leisure & Hospitality, Durable Goods Manufacturing and Wholesale & Retail Trade sectors.

Employment levels remain relatively stable in four industry sectors across the Midwest, according to employers surveyed: Education & Health Services, Government, Information and Other Services.

In the Professional & Business Services sector, Midwest employers report slightly weaker hiring plans when compared with Quarter 1 2017.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q2 2017	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Midwest</b>	<b>21</b>	<b>3</b>	<b>74</b>	<b>2</b>	<b>18</b>	<b>16</b>
Construction	23	2	71	4	21	14
Education & Health Services	15	1	82	2	14	13
Financial Activities	19	4	77	0	15	15
Government	17	3	76	4	14	12
Information	14	4	82	0	10	8
Leisure & Hospitality	36	4	59	1	32	27
Manufacturing – Durable Goods	21	3	74	2	18	17
Manufacturing – Nondurable Goods	25	1	73	1	24	23
Other Services	10	2	85	3	8	7
Professional & Business Services	24	3	72	1	21	17
Transportation & Utilities	21	2	76	1	19	18
Wholesale & Retail Trade	25	4	69	2	21	22

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

**+17 (+15)%**

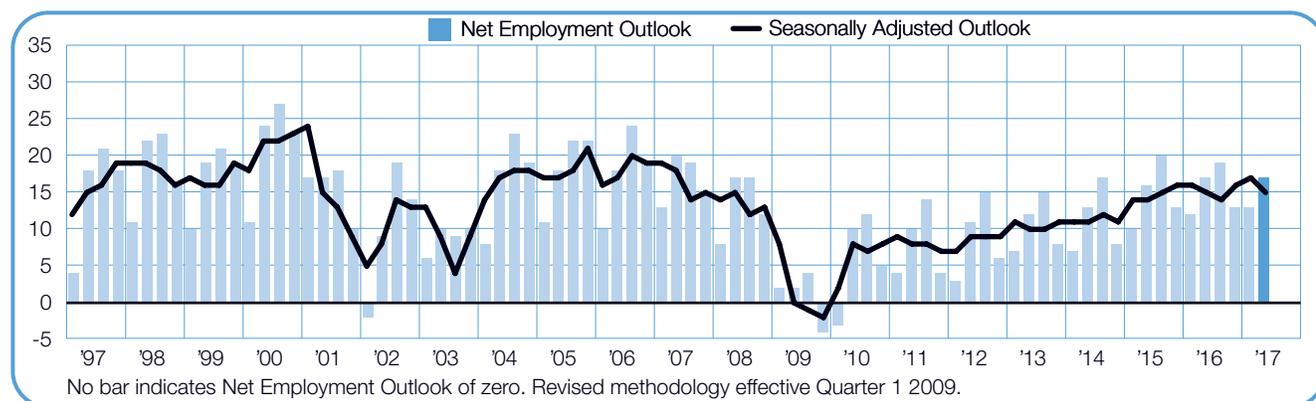
## Northeast

Payroll growth is expected by 21 percent of Northeast employers during the second quarter of 2017, while 4 percent anticipate a decline in staffing levels. The resulting Net Employment Outlook for the coming quarter is +17%. Once the figures are adjusted to allow for seasonal variation, hiring prospects in the Northeast region are slightly weaker when compared with the previous quarter but remain unchanged year-over-year.

Employers in the Construction sector in the Northeast report moderately stronger hiring intentions when compared with Quarter 1 2017, while a slight improvement is reported in the Wholesale & Retail Trade sector.

Hiring plans remain relatively stable in four industry sectors across the region when compared with the previous quarter: Education & Health Services, Leisure & Hospitality, Durable Goods Manufacturing and Other Services.

Transportation & Utilities sector employers in the Northeast report a considerable quarter-over-quarter decline in hiring prospects, while hiring plans are moderately weaker in the Nondurable Goods Manufacturing and Professional & Business Services sectors. Employers report slightly weaker Net Employment Outlooks in three sectors: Financial Activities, Government and Information.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q2 2017	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Northeast</b>	<b>21</b>	<b>4</b>	<b>74</b>	<b>1</b>	<b>17</b>	<b>15</b>
Construction	27	6	64	3	21	15
Education & Health Services	14	2	83	1	12	13
Financial Activities	20	2	78	0	18	17
Government	13	3	81	3	10	8
Information	13	4	83	0	9	9
Leisure & Hospitality	36	2	60	2	34	28
Manufacturing – Durable Goods	17	6	76	1	11	9
Manufacturing – Nondurable Goods	17	3	77	3	14	12
Other Services	11	4	84	1	7	6
Professional & Business Services	21	5	71	3	16	13
Transportation & Utilities	27	5	66	2	22	19
Wholesale & Retail Trade	24	4	70	2	20	23

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

**+18 (+17)%**

## South

Employers in 21 percent of the businesses surveyed in the South of the U.S. expect to grow payrolls in the April-June time frame. Meanwhile, 3 percent of employers in the region anticipate a decline in staffing levels, resulting in a Net Employment Outlook of +18%. Once the data is adjusted to allow for seasonal variation, hiring intentions remain relatively stable compared with the previous quarter and are unchanged year-over-year.

A considerably stronger labor market is anticipated by employers in the Professional & Business Services industry sector in the South, when compared with Quarter 1 2017. Elsewhere, slightly stronger hiring plans are reported in both the Construction and Other Services sectors.

Across the region, employers in seven industry sectors report relatively stable hiring prospects compared with the previous quarter: Education & Health Services, Financial Activities, Information, Leisure & Hospitality, Durable Goods Manufacturing, Transportation & Utilities and Wholesale & Retail Trade.

Hiring intentions in the region are slightly weaker in both the Government sector and the Nondurable Goods Manufacturing sector when compared with Quarter 1 2017.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q2 2017	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – South</b>	<b>21</b>	<b>3</b>	<b>73</b>	<b>3</b>	<b>18</b>	<b>17</b>
Construction	22	2	72	4	20	18
Education & Health Services	17	4	77	2	13	13
Financial Activities	20	4	75	1	16	17
Government	17	4	76	3	13	13
Information	20	2	75	3	18	17
Leisure & Hospitality	34	5	60	1	29	27
Manufacturing – Durable Goods	21	4	72	3	17	14
Manufacturing – Nondurable Goods	18	4	77	1	14	13
Other Services	12	2	85	1	10	9
Professional & Business Services	26	2	71	1	24	23
Transportation & Utilities	19	2	77	2	17	14
Wholesale & Retail Trade	22	5	73	0	17	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.

**+20 (+18)%**

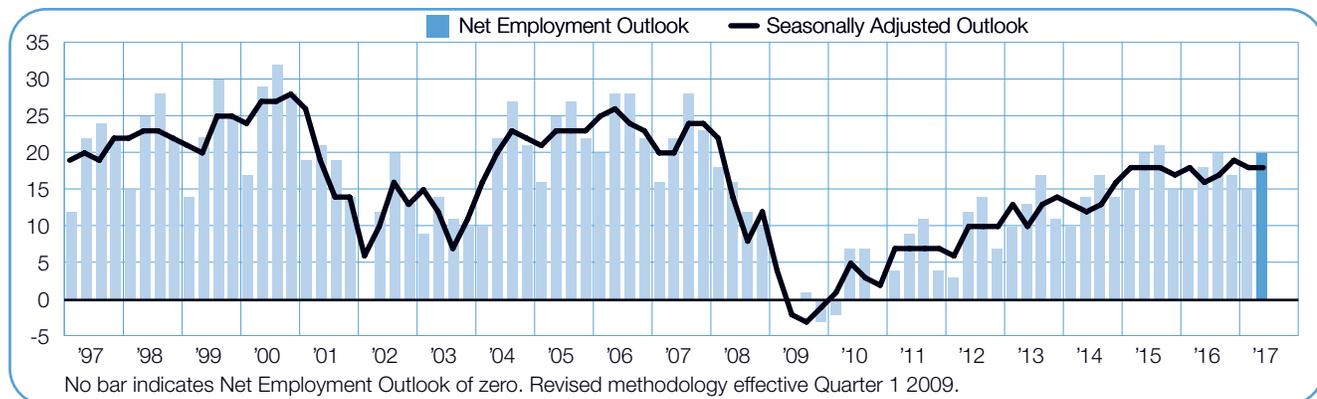
## West

Staffing levels are expected to increase during the second quarter of 2017 in 23 percent of the businesses surveyed in the West. However, 3 percent of employers in the region anticipate a decrease in payrolls. As a result the Net Employment Outlook stands at +20%. Once the figures are adjusted to remove seasonal variation, hiring intentions are unchanged when compared with the previous quarter and are slightly stronger when compared with this time a year ago.

Moderately stronger hiring prospects are reported in two industry sectors in the West, when compared with the first quarter of 2017: Education & Health Services and Government. Net Employment Outlooks are also slightly stronger in three sectors in the region: Financial Activities, Nondurable Goods Manufacturing and Transportation & Utilities.

Staffing levels are expected to remain relatively stable in three sectors across the West during the coming quarter: Construction, Information and Other Services.

Employers in the Durable Goods Manufacturing sector in the region report moderately weaker hiring plans when compared with the previous quarter, while hiring intentions decline slightly in three sectors: Leisure & Hospitality, Professional & Business Services and Wholesale & Retail Trade.



Industry	Increase %	Decrease %	No Change %	Don't Know %	Net Employment Outlook Q2 2017 %	Seasonally Adjusted %
<b>All Industries – West</b>	<b>23</b>	<b>3</b>	<b>72</b>	<b>2</b>	<b>20</b>	<b>18</b>
Construction	23	3	72	2	20	15
Education & Health Services	18	3	77	2	15	17
Financial Activities	21	2	76	1	19	19
Government	27	3	67	3	24	20
Information	13	2	85	0	11	13
Leisure & Hospitality	32	4	63	1	28	26
Manufacturing – Durable Goods	15	5	80	0	10	8
Manufacturing – Nondurable Goods	21	3	74	2	18	16
Other Services	17	4	77	2	13	12
Professional & Business Services	23	3	72	2	20	17
Transportation & Utilities	36	3	60	1	33	28
Wholesale & Retail Trade	23	4	71	2	19	19

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 2 2017, 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 Q2 2017	Metropolitan Statistical Areas
32%	Nashville
29%	Provo
28%	Colorado Springs, Fresno, Raleigh
27%	Charlotte, Oklahoma City
26%	Grand Rapids
25%	Denver, Jacksonville
24%	Dallas, Dayton, Honolulu, Madison, Orlando, Palm Bay, Springfield, Toledo
23%	Boise City, Detroit, Miami, San Jose, Washington
22%	Baltimore, Charleston, Portland
21%	Cape Coral, Chattanooga, Deltona, Harrisburg, Kansas City, New York, Omaha, San Antonio
20%	Albany, Bridgeport, Chicago, Columbia, Greensboro, Greenville, Knoxville, Milwaukee, Ogden, Oxnard
19%	Austin, Columbus, Phoenix, Pittsburgh, Rochester, Sacramento, Salt Lake City, Scranton, Seattle, Stockton
18%	Augusta, Cleveland, Des Moines, Philadelphia, San Francisco, Tucson, Winston-Salem
17%	Allentown, Birmingham, Lakeland, Louisville, Minneapolis, Providence, Spokane, St. Louis, Wichita, Youngstown
16%	Bakersfield, Cincinnati, Richmond, Worcester
15%	Albuquerque, Baton Rouge, Little Rock, Memphis, Syracuse
14%	Boston, Houston, Jackson, San Diego
13%	Atlanta, McAllen, Tampa, Tulsa, Virginia Beach
12%	Buffalo, Las Vegas
11%	Los Angeles
10%	New Haven
9%	Indianapolis, Riverside
7%	Akron, El Paso, North Port
5%	New Orleans
1%	Hartford

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 over 58,000 employers across 43 countries and territories to forecast labor market activity in Quarter 2 2017. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of June 2017 as compared to the current quarter?”

ManpowerGroup’s second-quarter research reveals that employers in 39 of 43 countries and territories intend to add to their payrolls by varying degrees in the April-June time frame.\* Overall, opportunities for job seekers are expected to remain similar to those available in the first three months of 2017, with employers in most countries and territories signaling that they are content to either maintain current staffing levels or engage in modest levels of payroll growth while they monitor ongoing developments in the marketplace.

Hiring plans improve in 17 of 43 countries and territories when compared quarter-over-quarter, decline in 15, and are unchanged in 11. The year-over-year trend reveals a more pronounced uptick with Outlooks strengthening in 25 countries and territories, weakening in 14, and remaining unchanged in three.\*\* Second-quarter hiring confidence is strongest in Taiwan, Japan, Slovenia and India. The weakest forecasts are reported in Brazil, Italy, Belgium and Switzerland.

Staffing levels are expected to grow in 22 of 25 countries in the Europe, Middle East & Africa (EMEA) region. Outlooks improve in 12 countries quarter-over-quarter, weaken in six and are unchanged in seven. In a year-over-year comparison, Outlooks improve in 18 countries and decline in only six. Job seekers in Slovenia, Hungary and Romania stand to benefit from the strongest employer hiring plans in the EMEA region. Additionally, employers in Slovenia, as well as their counterparts in Bulgaria, report their most optimistic hiring plans since their surveys were launched. The weakest forecasts are reported in Italy, Belgium and Switzerland.

Payrolls are expected to increase in all eight Asia Pacific countries and territories. When compared to the prior quarter, Net Employment Outlooks decline in three countries and territories, are unchanged in four, and improve in only one. In a year-over-year comparison the hiring pace is expected to improve by varying margins in four countries and territories and decline in the remaining four. For the second consecutive quarter, employers in Taiwan report the most optimistic forecast in the region—as well as across the globe—while for the fourth consecutive quarter employers in China report the region’s weakest forecast.

Positive Outlooks are reported in nine of the 10 countries surveyed in the Americas. Hiring confidence strengthens in four countries and declines in six when compared to the first three months of 2017. Year-over-year, hiring prospects improve in three countries, weaken in four and are unchanged in three. For the third consecutive quarter employers in the United States report the strongest hiring plans in the Americas, and for the ninth consecutive quarter employers in Brazil report the weakest.

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 ManpowerGroup Employment Outlook Survey will be released on 13 June 2017 and will detail expected labor market activity for the third quarter of 2017.

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

\*\* Portugal launched 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 ManpowerGroup 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 ManpowerGroup Employment Outlook Survey:

**Unique:** It is unparalleled in its size, scope, longevity and area of focus.

**Projective:** 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 survey is based on interviews with over 58,000 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 2 2017 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 June 2017 as compared to the current quarter?"

## Methodology

The ManpowerGroup 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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