

Q1/2011

Manpower  
Employment  
Outlook Survey  
United States

A Manpower Research Report



Manpower®

# H1/1Q

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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.

# United States Employment Outlook

More than 18,000 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 employment trends between January and March 2011. 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 March 2011 as compared to the current quarter?”

Among U.S. employers surveyed, 14% expect to add to their workforces, and 10% expect a decline in their payrolls during Quarter 1 2011. Seventy-three percent of employers anticipate making no change to staff levels, and the remaining 3% of employers are undecided about their Quarter 1 2011 hiring plans.

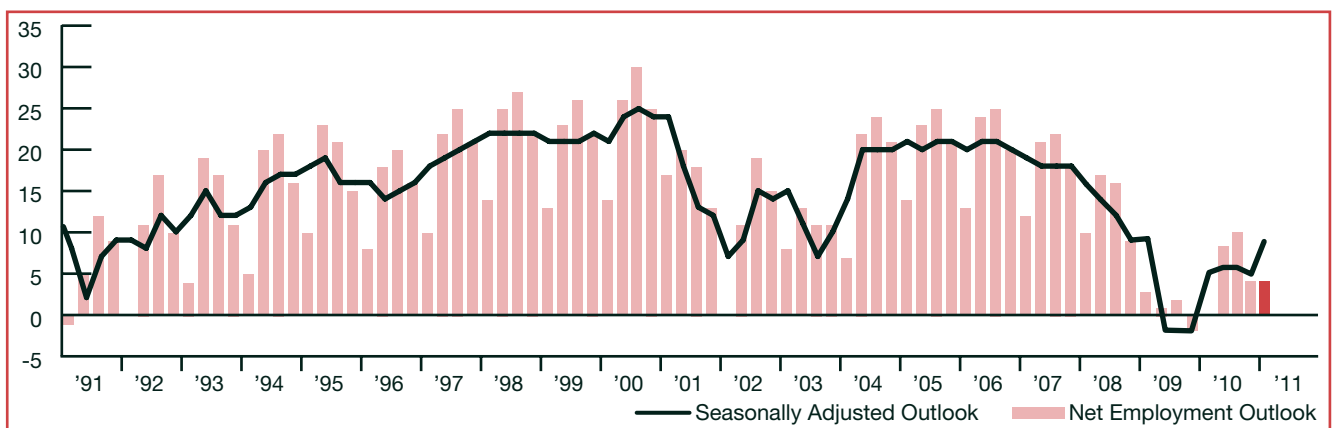
When seasonal variations are removed from the data, the Outlook is +9%, the most promising hiring expectations reported since Quarter 4 2008. Survey results suggest that employers expect a slight increase

in the hiring pace during the January – March 2011 period compared to the last three months of 2010. The first quarter Net Employment Outlook for the U.S. also shows slight gains compared to one year ago at this time. Following a negative Outlook in the final three quarters of 2009, U.S. employers have now expressed a positive Outlook for five straight quarters.

According to seasonally adjusted regional data, employers in all four regions surveyed have more positive hiring plans compared to one quarter ago at this time. Employers in the West report the biggest jump in hiring confidence quarter-over-quarter.

Across all regions, employers anticipate an increase in hiring activity compared to one year ago. Employers in the Northeast, Midwest and West report a moderate increase in year-over-year hiring expectations, while employers in the South report a slight increase. Overall employment prospects are strongest in the Midwest and South. Despite significant increases in Western employers’ hiring plans compared to a quarter ago and last year at this time, the Net Employment Outlook in the region is the most reserved in the U.S.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Quarter 1 2011</b>	<b>14</b>	<b>10</b>	<b>73</b>	<b>3</b>	<b>4</b>	<b>9</b>
Quarter 4 2010	15	11	71	3	4	5
Quarter 3 2010	18	8	70	4	10	6
Quarter 2 2010	16	8	73	3	8	6
Quarter 1 2010	12	12	73	3	0	5



No bar indicates Net Employment Outlook of zero. Revised methodology effective Quarter 1 2009.

The results of the Manpower Employment Outlook Survey in the United States include Puerto Rico.

## Industry Sector Comparisons

For Quarter 1 2011, employers have a positive Outlook in 11 of the 13 industry sectors: Mining, Durable and Nondurable Goods Manufacturing, Transportation & Utilities, Wholesale & Retail Trade, Information, Financial Activities, Professional & Business Services, Education & Health Services, Leisure & Hospitality and Other Services. The Outlook is stable for employers in Government and negative among those in the Construction industry.

When the industry sector data is compared quarter-over-quarter, employers in Government anticipate a moderate hiring increase, while Information, Education & Health Services and Leisure & Hospitality look to slightly increase their payrolls. Seven industry sector

employers plan to keep staff levels stable: Construction, Durable and Nondurable Goods Manufacturing, Transportation & Utilities, Financial Activities, Professional & Business Services and Other Services. A slight decrease in employment is expected among those in the Wholesale & Retail Trade industry. Mining employers are somewhat more pessimistic about the January – March 2011 period compared to October – December 2010.

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

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q1 2011	Net Employment Outlook Q4 2010
	%	%	%	%	%	%
Construction	10	19	66	5	-9	-8
Education & Health Services	11	5	81	3	6	4
Financial Activities	10	6	82	2	4	4
Government	10	10	76	4	0	-6
Information	16	6	75	3	10	7
Leisure & Hospitality	22	10	66	2	12	9
Manufacturing – Durable Goods	15	9	72	4	6	7
Manufacturing – Nondurable Goods	15	9	72	4	6	6
Mining	16	10	69	5	6	13
Other Services	11	7	80	2	4	3
Professional & Business Services	20	9	68	3	11	10
Transportation & Utilities	14	12	72	2	2	2
Wholesale & Retail Trade	20	10	68	2	10	13

## Regional Comparisons

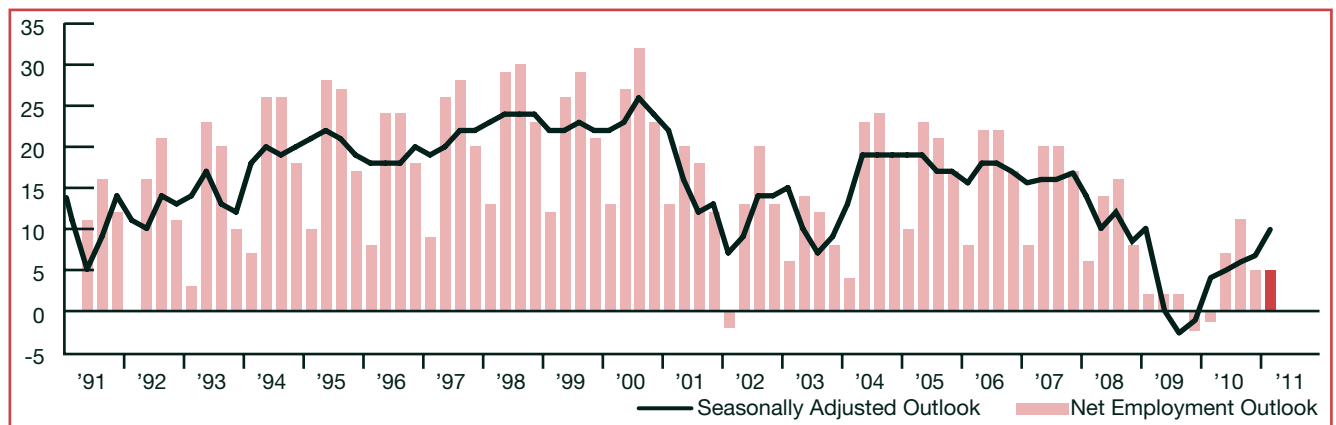
### Midwest Seasonally Adjusted Net Employment Outlook: +10%

In the Midwest, 14% of employers surveyed expect to increase staff levels for Quarter 1 2011 and 9% anticipate reduced headcounts, leading to a Net Employment Outlook of +5%. When seasonal variations are removed from the data, the employment forecast for Quarter 1 2011 is up slightly compared to Quarter 4 2010 and up moderately compared to one year ago at this time. Employers in the Midwest are among the most confident for Quarter 1 2011.

Employers in four of the 12 industry sectors surveyed in the Midwest anticipate an improvement in first-quarter staffing levels compared to Quarter 4 2010. Employers

in the Professional & Business Services sector anticipate a moderate increase, while those in Information, Leisure & Hospitality and Government foresee a slight improvement. The quarter-over-quarter Outlook is relatively stable among employers in six industry sectors: Durable and Nondurable Goods Manufacturing, Transportation & Utilities, Financial Activities, Education & Health Services and Other Services. Employers in Wholesale & Resale Trade look to slow down hiring moderately, and those in Construction expect the hiring pace to considerably decrease compared to one quarter ago.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Midwest</b>	<b>14</b>	<b>9</b>	<b>73</b>	<b>4</b>	<b>5</b>	<b>10</b>
Construction	8	24	64	4	-16	–
Education & Health Services	9	5	81	5	4	–
Financial Activities	10	7	81	2	3	–
Government	9	9	78	4	0	–
Information	11	6	81	2	5	–
Leisure & Hospitality	19	13	66	2	6	–
Manufacturing – Durable Goods	19	6	70	5	13	–
Manufacturing – Nondurable Goods	17	10	71	2	7	–
Other Services	11	6	80	3	5	–
Professional & Business Services	22	8	67	3	14	–
Transportation & Utilities	17	10	70	3	7	–
Wholesale & Retail Trade	17	8	73	2	9	–



No bar indicates Net Employment Outlook of zero. Revised methodology effective Quarter 1 2009.

The Midwest Region comprises the following states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries is not currently available.

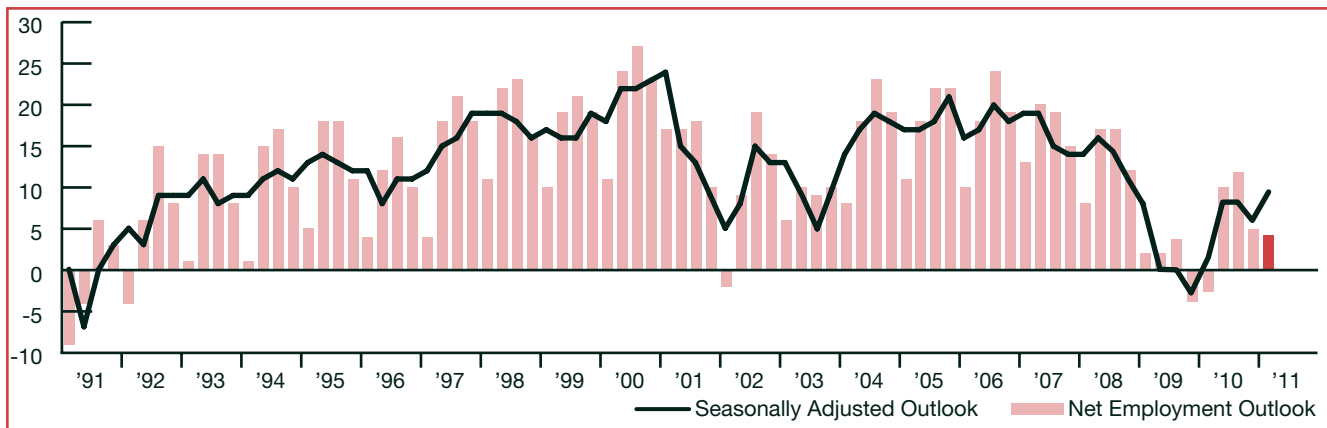
### Northeast Seasonally Adjusted Net Employment Outlook: +9 %

In the Northeast, 14% of employers indicate plans to increase staff levels, while 10% expect to decrease payrolls, resulting in a Net Employment Outlook of +4% for Quarter 1 2011. The seasonally adjusted survey data reflects a slight increase in the Outlook compared to three months ago and a moderate increase in the hiring pace compared to one year ago at this time.

Compared to Quarter 4 2010, Northeast region employers in three industry sectors expect a slight increase in the Outlook for Quarter 1 2011: Transportation & Utilities, Leisure & Hospitality and Other Services. Employers in Durable Goods Manufacturing,

Information, Financial Activities, Education & Health Services and Government report stable hiring intentions for January – March in comparison to October – December. In each of the industries anticipating a less promising first quarter – Construction, Nondurable Goods Manufacturing, Wholesale & Retail Trade and Professional & Business Services – respondents foresee only slight changes to their employment activity.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Northeast</b>	<b>14</b>	<b>10</b>	<b>73</b>	<b>3</b>	<b>4</b>	<b>9</b>
Construction	10	22	63	5	-12	–
Education & Health Services	9	4	83	4	5	–
Financial Activities	10	5	83	2	5	–
Government	8	11	78	3	-3	–
Information	17	7	71	5	10	–
Leisure & Hospitality	18	12	67	3	6	–
Manufacturing – Durable Goods	14	8	73	5	6	–
Manufacturing – Nondurable Goods	16	7	72	5	9	–
Other Services	12	7	81	0	5	–
Professional & Business Services	22	8	69	1	14	–
Transportation & Utilities	11	13	72	4	-2	–
Wholesale & Retail Trade	21	10	68	1	11	–



The Northeast Region comprises the following states: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries is not currently available.

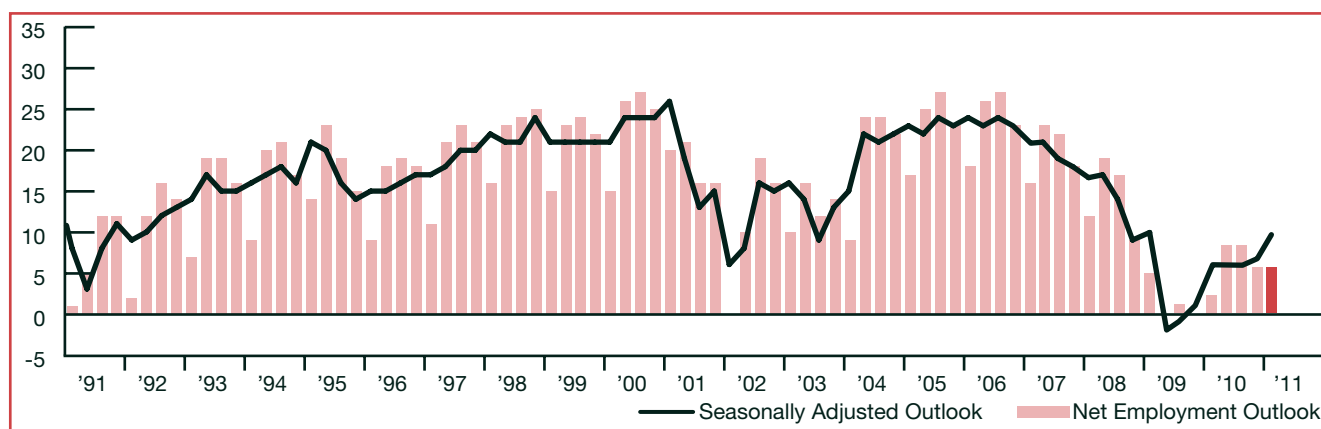
## South Seasonally Adjusted Net Employment Outlook: +10%

In the South, 15% of employers surveyed expect to increase staff levels, and 9% plan to decrease their employee headcounts, resulting in a Net Employment Outlook of +6%. When seasonal variations are removed from the data, the Quarter 1 2011 employment forecast is slightly stronger than both Quarter 4 2010 and Quarter 1 2010. Employers in the South are among the most confident for Quarter 1 2011.

In Quarter 1 2011, Leisure & Hospitality and Government employers in the South anticipate a slight increase in hiring activity compared to Quarter 4 2010. Employers in four other industry sectors expect relative

stability quarter over quarter: Information, Financial Activities, Education & Health Services and Other Services. Employers in five industries – Construction, Durable and Nondurable Goods Manufacturing, Transportation & Utilities, Wholesale & Retail Trade and Professional & Business Services – report a weaker employment Outlook for the first quarter compared to the previous quarter, although in each case the projected change in staffing levels is slight.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – South</b>	<b>15</b>	<b>9</b>	<b>73</b>	<b>3</b>	<b>6</b>	<b>10</b>
Construction	9	18	69	4	-9	–
Education & Health Services	12	4	82	2	8	–
Financial Activities	10	6	83	1	4	–
Government	11	9	76	4	2	–
Information	16	7	73	4	9	–
Leisure & Hospitality	27	9	61	3	18	–
Manufacturing – Durable Goods	13	9	73	5	4	–
Manufacturing – Nondurable Goods	12	9	76	3	3	–
Other Services	10	6	81	3	4	–
Professional & Business Services	18	9	68	5	9	–
Transportation & Utilities	13	11	73	3	2	–
Wholesale & Retail Trade	21	9	66	4	12	–



No bar indicates Net Employment Outlook of zero. Revised methodology effective Quarter 1 2009.

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. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries is not currently available.

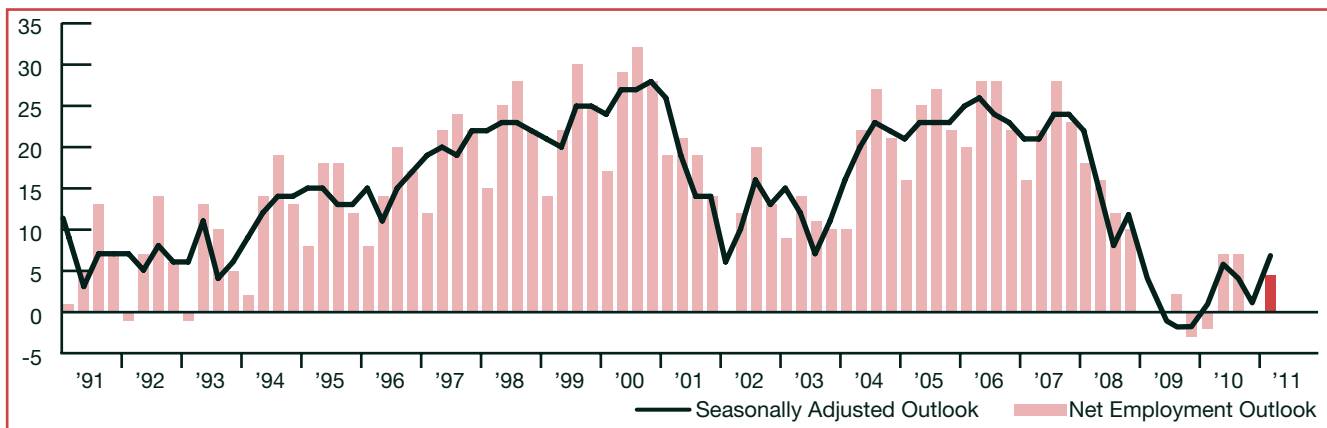
## West Seasonally Adjusted Net Employment Outlook: +7%

Among employers surveyed in the West, 14% plan to add staff, while 10% anticipate a decline in payrolls, resulting in a Net Employment Outlook of +4% for Quarter 1 2011. According to seasonally adjusted survey results, employers in the West anticipate a moderate increase in hiring compared to Quarter 4 2010 and compared to Quarter 1 2010. While the quarter-over-quarter increase among employers in the West is the strongest of the four U.S. regions surveyed, the region's Outlook remains the least optimistic overall.

Of the four U.S. regions surveyed, the West has the most industries in which employers anticipate hiring

increases from a quarter ago. Employers in Government foresee a considerable improvement, whereas those in Construction, Information, Education & Health Services and Other Services sectors expect moderate increases in hiring activity. Employment plans are also positive but more tempered in Financial Activities and Professional & Business Services, where employers predict slight headcount gains. Employers in the Transportation & Utilities, Wholesale & Retail Trade and Leisure & Hospitality industries envision a stable January – March period. Employers in Durable and Nondurable Goods Manufacturing are poised for a mild decrease in net hiring activity.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – West</b>	<b>14</b>	<b>10</b>	<b>72</b>	<b>4</b>	<b>4</b>	<b>7</b>
Construction	12	17	67	4	-5	–
Education & Health Services	13	6	78	3	7	–
Financial Activities	11	5	81	3	6	–
Government	12	12	71	5	0	–
Information	20	6	74	0	14	–
Leisure & Hospitality	18	9	72	1	9	–
Manufacturing – Durable Goods	13	11	70	6	2	–
Manufacturing – Nondurable Goods	15	11	69	5	4	–
Other Services	13	8	77	2	5	–
Professional & Business Services	18	10	68	4	8	–
Transportation & Utilities	13	13	72	2	0	–
Wholesale & Retail Trade	19	12	68	1	7	–



No bar indicates Net Employment Outlook of zero. Revised methodology effective Quarter 1 2009.

The West Region comprises the following states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries is not currently available.

# Global Employment Outlook

Nearly 64,000 employers have been interviewed across 39 countries and territories to measure anticipated employment trends\* between January and March 2011. Employers in 32 of the 39 countries and territories Manpower surveyed expect to add to their workforces to varying degrees over the next three months. Employers in Bulgaria, Slovenia and Turkey participated in the survey for the first time, bringing the total number of countries surveyed in the Europe, Middle East & Africa (EMEA) region to 21.

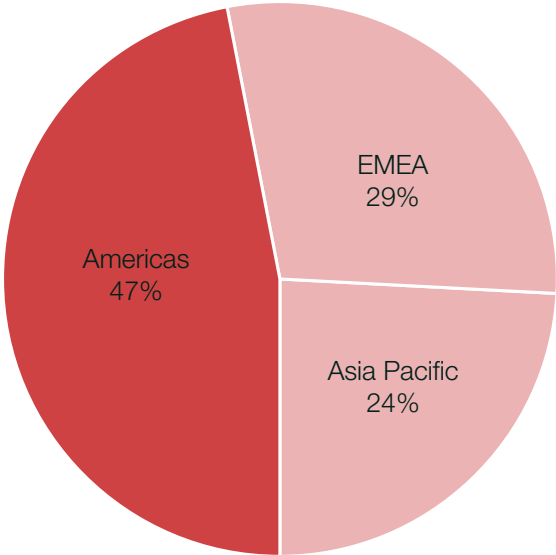
Employers in India, China, Taiwan, Brazil, Turkey and Singapore report the strongest first-quarter hiring plans, while those in Greece, the Czech Republic, Austria and Ireland report the weakest hiring forecasts. The hiring pace is expected to decline in 17 of the 36 countries and territories where quarter-over-quarter comparisons are possible, and in the 35 countries and territories where year-over-year comparisons are possible, the hiring pace is expected to improve in 28 countries.

Regionally, employers in the Americas and Asia Pacific continue to report positive Net Employment Outlooks. Hiring demands have improved somewhat from 12 months ago in all eight Asia Pacific countries and territories, and in all but one country in the Americas where year-over-year data is available. Outlooks in the U.S. and India improve slightly from both Quarter 4 2010 and last year at this time, and Japan's Net Employment Outlook continues to improve incrementally with employers reporting their most optimistic forecast since Quarter 4 2008.

In the EMEA region, Outlooks decline in 11 of 18 countries from three months ago. However, year-over-year comparisons are more favorable, showing improved job prospects in 12 countries from Quarter 1 2010. Hiring intentions are strongest in Turkey, Germany and Sweden, while employers in Italy report their first positive Net Employment Outlook since Quarter 3 2008.

\* Commentary is based on seasonally adjusted data where available.

## Survey Respondents by Region



Research for the Quarter 1 2011 Manpower Employment Outlook Survey involved surveying nearly 64,000 human resources directors and senior hiring managers from public and private organizations worldwide. 47% of respondents came from 10 countries in the Americas; 24% from eight countries and territories across Asia Pacific; and 29% from 21 countries in EMEA.

Full survey results for each of the 39 countries and territories included in this quarter's survey, plus regional and global comparisons, can be found at the Manpower Press Room at [press.manpower.com](http://press.manpower.com). In addition, all tables and graphs from the full report are available for download from the Manpower website at [www.manpower.com/library](http://www.manpower.com/library).

## 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. The survey has been running since 1962 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 in which it is conducted. The survey participants are not derived from Manpower's client base.

**Robust:** The survey is based on interviews with nearly 64,000 public and private employers across 39 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 nearly five decades, the survey has derived all of its information from a single question.

## Survey Question

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 March 2011 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 research team for the 39 countries and territories where the survey is currently conducted includes Manpower's internal research team and Infocorp Ltd. 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%.

**Regions:** The survey reports results by the four regions within the U.S. as determined by the U.S. Census Bureau. Each region is represented with a minimum error factor of +/- 1.4% based on a 90% confidence level.

**Industries:** The survey reports national results by the NAICS Supersectors. Error factors not to exceed +/- 5% for Mining and +/- 3% for the remaining Supersectors based on a 90% confidence level.

## 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.

## Seasonal Adjustment

Seasonal adjustments have been applied to the data for Argentina, Australia, Austria, Belgium, Canada, Costa Rica, China, France, Germany, Hong Kong, India, Ireland, Italy, Japan, Mexico, Netherlands, New Zealand, Norway, Peru, Singapore, South Africa, Spain, Sweden, Switzerland, Taiwan, the United Kingdom and the United States to provide additional insight into the survey data. These adjustments make it possible to review the data without the employment fluctuations that normally occur at the same time each year, thus providing a clearer picture of the data over time. Manpower 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, Manpower 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. Downloadable visuals are also available. Visit [press.manpower.com](http://press.manpower.com).

## History of the Survey

- 1962** First generation of the Manpower Employment Outlook Survey launched in the United States and Canada.
- 1966** Manpower's United Kingdom operation launches the equivalent of the United States survey, naming the report the Quarterly Survey of Employment Prospects. The survey adopts the same forward looking research format as the United States survey and is the first of its kind in Europe.
- 1976** Second generation of the Manpower Employment Outlook Survey launched in the United States and Canada. Research methodology is updated to evolve with advancements in the field of market research.

- 2002 Manpower United Kingdom's Quarterly Survey of Employment Prospects is updated to adopt an enhanced research methodology. Manpower's operations in Mexico and Ireland launch the survey in their respective countries.
- 2003 Third generation of the Manpower Employment Outlook Survey is launched, expanding the program to a total of 18 countries worldwide: Australia, Austria, Belgium, Canada, France, Germany, Hong Kong, Ireland, Italy, Japan, Mexico, Netherlands, Norway, Singapore, Spain, Sweden, the United Kingdom and the United States.
- 2004 Manpower operations in New Zealand launch the Manpower Employment Outlook Survey.
- 2005 Manpower operations in China, India, Switzerland, and Taiwan launch the Manpower Employment Outlook Survey.
- 2006 Manpower operations in Costa Rica and Peru join the survey program. Surveys in Australia, Austria, Belgium, France, Germany, Hong Kong, Ireland, Italy, Japan, Mexico, Netherlands, Norway, Singapore, Spain and Sweden add seasonally adjusted data in the third quarter. Manpower operations in South Africa launch the Manpower Employment Outlook Survey.
- 2007 Manpower operations in Argentina join the Manpower Employment Outlook Survey. The survey in New Zealand adds seasonally adjusted data in the first quarter.
- 2008 Manpower operations in Colombia, the Czech Republic, Greece, Guatemala, Poland and Romania join the survey program. China and Taiwan add seasonally adjusted data in the second quarter. India and Switzerland add seasonally adjusted data in the third quarter.
- 2009 Manpower operations in Hungary and Brazil launch the Manpower Employment Outlook Survey.
- 2010 Manpower's Panama operation launches the Manpower Employment Outlook Survey, expanding the program total to 36 countries and territories worldwide. Peru adds seasonally adjusted data in the second quarter. Costa Rica adds seasonally adjusted data in the fourth quarter.
- 2011 Beginning in the first quarter, operations in Bulgaria, Slovenia and Turkey join the Manpower Employment Outlook Survey. Additionally, seasonally adjusted data is added in the first quarter for Argentina and South Africa.

## About Manpower Inc.

Manpower Inc. (NYSE: MAN) is a world leader in innovative workforce solutions; creating and delivering services that enable its clients to win in the changing world of work. With over 60 years' experience, Manpower offers employers a range of services and solutions for the entire employment and business cycle including permanent, temporary and contract recruitment; employee assessment and selection; training; outplacement; outsourcing and consulting. Manpower's worldwide network of nearly 4,000 offices in 82 countries and territories enables the company to meet the needs of its 400,000 clients per year, including small and medium size enterprises in all industry sectors, as well as the world's largest multinational corporations. The focus of Manpower's work is on raising productivity through improved quality, efficiency and cost-reduction across their total workforce, enabling clients to concentrate on their core business activities. Manpower Inc. operates under five brands: Manpower, Manpower Professional, Elan, Jefferson Wells and Right Management. More information about Manpower Inc. is available at [www.manpower.com](http://www.manpower.com).

## About Manpower United States

In the United States, Manpower offers a range of services including temporary and contract recruitment, employee assessment and selection, and training. Under the Manpower Professional brand, the company creates ideal employment matches between job seekers and employers in information technology, engineering, finance, healthcare and other business professional arenas. Manpower leverages its expertise in staffing and consulting for the U.S. federal government through Manpower Public Sector, and provides clients with managed service programs, business and recruitment process outsourcing offerings, and other integrated workforce management solutions through Manpower Business Solutions. Manpower is committed to exceeding client expectations, as evidenced by its 2009 Net Promoter Score of 55 percent, significantly above industry average. More information about Manpower is available at [us.manpower.com](http://us.manpower.com) or [press.manpower.com](http://press.manpower.com).

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