

**Manpower
Employment
Outlook Survey
United States**

**Q1
2016**



ManpowerGroup™

United States Employment Outlook

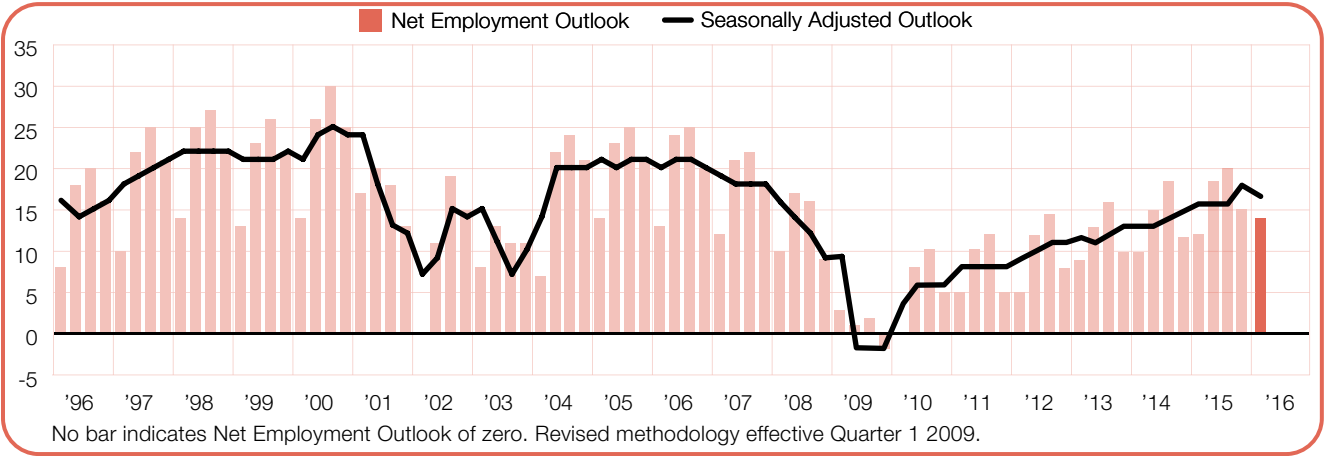
More than 11,000 interviews have been conducted with employers within the United States, including all 50 states, the top 100 Metropolitan Statistical Areas (MSAs), the District of Columbia and Puerto Rico, to measure hiring intentions between January and March 2016. The mix of industries within the 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 March 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
	%	%	%	%	%	%
Quarter 1 2016	20	6	72	2	14	17
Quarter 4 2015	21	6	71	2	15	18
Quarter 3 2015	24	4	70	2	20	16
Quarter 2 2015	22	4	72	2	18	16
Quarter 1 2015	19	6	73	2	13	16



Among U.S. employers surveyed, 20 percent expect to add to their workforces, and 6 percent expect a decline in their payrolls during Quarter 1 2016. Seventy-two percent of employers anticipate making no change to staff levels, and the remaining 2 percent of employers are undecided about their Quarter 1 2016 hiring plans.

When seasonal variations are removed from the data, the Net Employment Outlook is +17%. Hiring intentions are relatively stable compared to Quarter 4 2015 and to one year ago at this time.

Three of the four U.S. regions surveyed report no change in Net Employment Outlook in Quarter 1 2016. The West reports a 1 percent increase compared to Quarter 4 2015.

When seasonal variations are removed from the data, the West region reports the strongest Outlook at +18%, followed by the Midwest and South at +17% and the Northeast at +16%. Quarter over quarter, employers in all four regions expect a relatively stable hiring pace. Compared to one year ago at this time, the national deseasonalized Net Employment Outlook gained 1 percent. Compared to the same time last year, employers in the South, West and Midwest foresee relatively stable hiring for Quarter 1 2016, while employers in the Northeast anticipate a slight increase in hiring.

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

When seasonally adjusted for Quarter 1 2016, employers nationwide have a positive Outlook in all 13 industry sectors included in the survey: Leisure & Hospitality (+30%), Transportation & Utilities (+23%), Wholesale & Retail Trade (+22%), Professional & Business Services (+18%), Construction (+15%), Financial Activities (+15%), Information (+14%), Nondurable Goods Manufacturing (+13%), Durable Goods Manufacturing (+12%), Education & Health Services (+12%), Government (+11%), Other Services (+10%) and Mining (+1%).

Quarter over quarter, seasonally adjusted Net Employment Outlook data indicate employers in the Information, Transportation & Utilities,

Leisure & Hospitality and Other Services sectors expect a slight increase in hiring nationwide.

Employment outlook is predicted to be stable nationwide this quarter in the Education & Health Services, Wholesale & Retail Trade, Nondurable Goods Manufacturing and Durable Goods Manufacturing industry sectors.

Five industry sectors anticipate a slight decrease in employment nationwide: Mining, Construction, Government, Financial Activities and Professional & Business Services.

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 Q1 2016	Seasonally Adjusted
	%	%	%	%	%	%
Construction	17	10	71	2	7	15
Education & Health Services	14	3	81	2	11	12
Financial Activities	16	3	80	1	13	15
Government	15	4	78	3	11	11
Information	18	3	77	2	15	14
Leisure & Hospitality	34	8	55	3	26	30
Manufacturing - Durable Goods	17	9	72	2	8	12
Manufacturing - Nondurable Goods	17	7	75	1	10	13
Mining	10	14	71	5	-4	1
Other Services	13	4	81	2	9	10
Professional & Business Services	21	6	70	3	15	18
Transportation & Utilities	25	6	68	1	19	23
Wholesale & Retail Trade	26	6	67	1	20	22

Regional Comparisons

+13 (+17)%

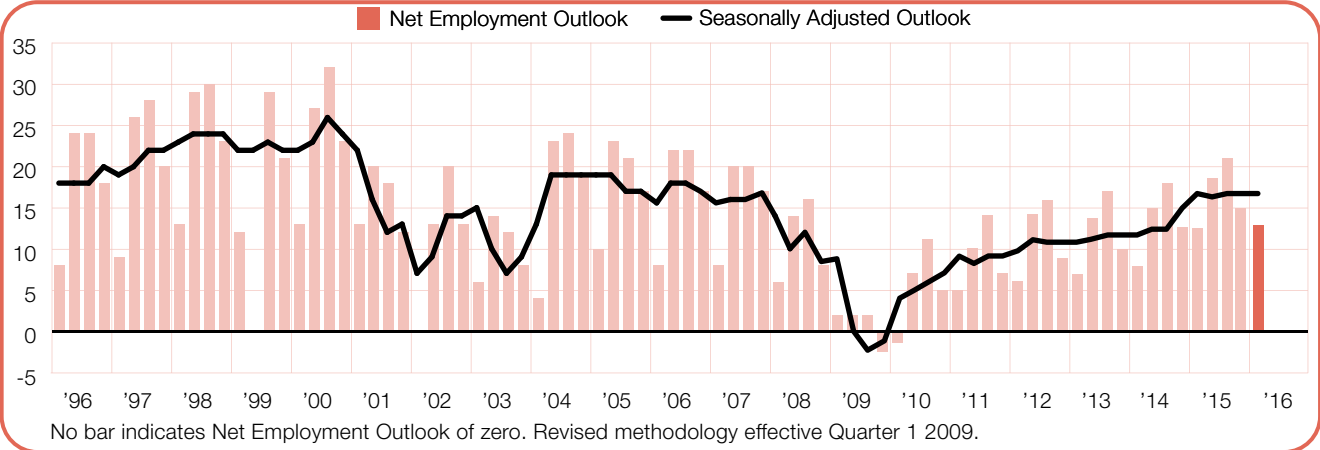
Midwest

In the Midwest, 20 percent of employers surveyed expect to increase staff levels for Quarter 1 2016 and 7 percent anticipate reduced headcounts, resulting in a Net Employment Outlook of +13%. When seasonal variations are removed from the data, the Outlook for Quarter 1 2016 is relatively stable compared to Quarter 4 2015 and to one year ago at this time.

Quarter over quarter, the Transportation & Utilities sector reports a moderate increase in staffing plans. Hiring plans are slightly stronger for Quarter 1 2016 compared to Quarter 4 2015 in three of the Midwest industry sectors surveyed: Government, Other Services and Information.

Employers in the Durable Goods Manufacturing, Nondurable Goods Manufacturing, Financial Activities, Professional & Business Services, Education & Health Services and Leisure & Hospitality sectors expect relatively stable hiring.

A slight decrease in hiring in the Midwest for the same period was reported in the Wholesale Retail & Trade sector. Construction employers expect a moderate decrease this quarter.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q1 2016	Seasonally Adjusted
	%	%	%	%	%	%
All Industries - Midwest	20	7	71	2	13	17
Construction	14	13	70	3	1	16
Education & Health Services	13	3	82	2	10	11
Financial Activities	21	3	76	0	18	20
Government	11	2	83	4	9	11
Information	13	5	81	1	8	9
Leisure & Hospitality	34	8	54	4	26	33
Manufacturing - Durable Goods	19	11	68	2	8	15
Manufacturing - Nondurable Goods	22	7	70	1	15	19
Other Services	15	5	80	0	10	12
Professional & Business Services	20	5	72	3	15	20
Transportation & Utilities	27	6	66	1	21	23
Wholesale & Retail Trade	23	9	66	2	14	17

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

+12 (+16)%

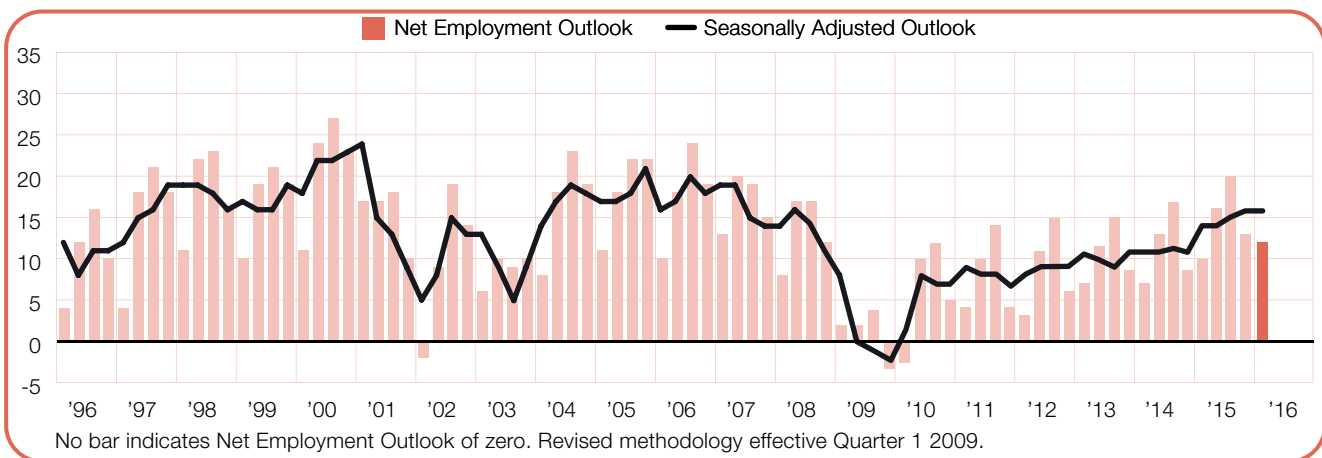
Northeast

In the Northeast, 19 percent of employers indicate plans to increase staff levels, while 7 percent expect to decrease payrolls, resulting in a Net Employment Outlook of +12% for Quarter 1 2016. According to seasonally adjusted survey results, employers anticipate relatively stable hiring plans compared to Quarter 4 2015 and a slight increase from one year ago at this time.

Compared to Quarter 4 2015 survey results, Northeast employers in the Information sector expect a considerable increase in hiring, while employers in Professional & Business Services and Construction sectors expect a moderate hiring increase. The Other Services and Leisure & Hospitality sectors anticipate a slight increase in hiring.

Employers in Transportation & Utilities, Wholesale Retail & Trade and Education & Health Services expect hiring to remain relatively stable.

Employers in two sectors — Government and Nondurable Durable Goods Manufacturing — anticipate a slight decrease in hiring pace this quarter. Employers in the Financial Activities and Durable Goods Manufacturing industry sectors report a moderate decrease in hiring intentions for Quarter 1 2016.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q1 2016	Seasonally Adjusted
	%	%	%	%	%	%
All Industries - Northeast	19	7	72	2	12	16
Construction	14	14	70	2	0	14
Education & Health Services	14	2	82	2	12	12
Financial Activities	16	4	79	1	12	15
Government	11	5	81	3	6	7
Information	14	4	81	1	10	11
Leisure & Hospitality	29	16	54	1	13	25
Manufacturing - Durable Goods	15	10	73	2	5	7
Manufacturing - Nondurable Goods	18	8	72	2	10	16
Other Services	7	3	88	2	4	5
Professional & Business Services	27	7	64	2	20	22
Transportation & Utilities	29	5	66	0	24	27
Wholesale & Retail Trade	26	5	68	1	21	25

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

+16 (+17)%

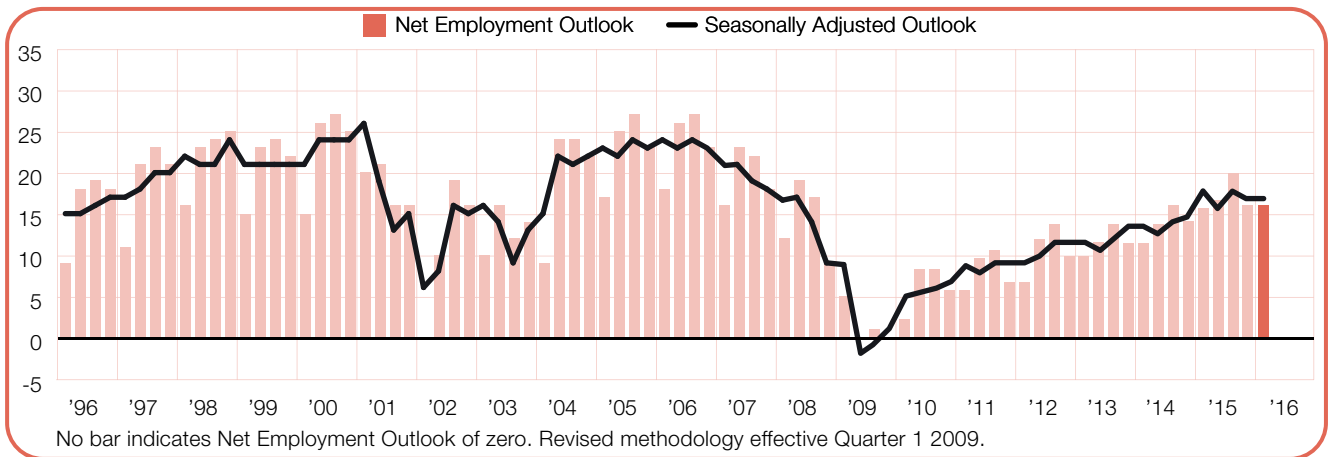
South

In the South, 21 percent of employers surveyed expect to increase staff levels and 5 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 to one year ago at this time.

Quarter over quarter, Leisure & Hospitality and Transportation & Utilities employers report a moderate increase in hiring plans. A slight increase in job prospects is expected in the Information sector.

Five industry sectors — Construction, Nondurable Goods Manufacturing and Wholesale Retail & Trade, Financial Activities and Other Services — report relatively stable hiring expectations.

Education & Health Services, Durable Goods Manufacturing and Professional & Business Services industry sectors anticipate a slight weakening in hiring pace. Employers in the Government expect a moderate decline in hiring this quarter.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q1 2016	Seasonally Adjusted
	%	%	%	%	%	%
All Industries - South	21	5	72	2	16	17
Construction	18	6	74	2	12	14
Education & Health Services	13	3	82	2	10	11
Financial Activities	15	3	81	1	12	14
Government	15	3	79	3	12	13
Information	22	3	73	2	19	19
Leisure & Hospitality	39	6	54	1	33	33
Manufacturing - Durable Goods	16	8	73	3	8	12
Manufacturing - Nondurable Goods	15	7	77	1	8	8
Other Services	12	3	81	4	9	10
Professional & Business Services	21	7	71	1	14	16
Transportation & Utilities	24	5	69	2	19	22
Wholesale & Retail Trade	27	5	67	1	22	21

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.

+15 (+18)%

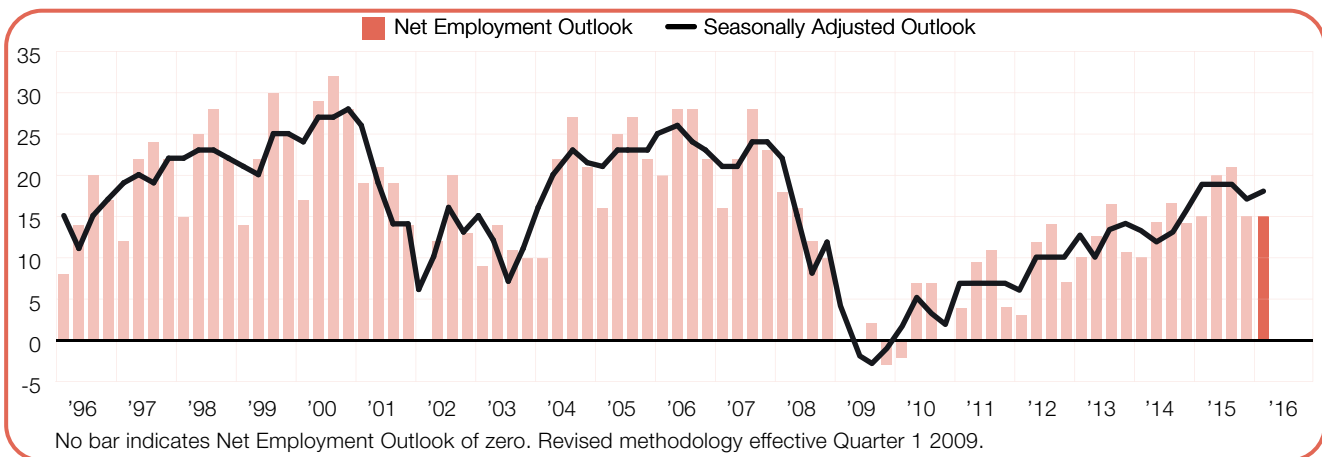
West

Among employers surveyed in the West, 21 percent plan to add staff, while 6 percent anticipate a decline in payrolls, resulting in a Net Employment Outlook of +15% for Quarter 1 2016. According to seasonally adjusted survey results, employers in the West anticipate a relatively stable hiring pace compared to Quarter 4 2015 and to one year ago at this time.

Employers in three industry sectors report a moderate improvement in hiring expectations in Quarter 1 2016 compared to Quarter 4 2015: Other Services, Durable Goods Manufacturing and Nondurable Goods Manufacturing. Meanwhile, employers in the Wholesale Retail & Trade and Information industry sectors anticipate a slight increase in the hiring pace.

Relatively stable hiring plans were reported by the Government, Leisure & Hospitality and Education & Health Services sectors.

A slight decrease in hiring plans was reported in the Construction, Professional & Business Services, Transportation & Utilities and Financial Activities industry sectors.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q1 2016	Seasonally Adjusted
	%	%	%	%	%	%
All Industries - West	21	6	71	2	15	18
Construction	19	12	66	3	7	18
Education & Health Services	18	3	75	4	15	16
Financial Activities	15	3	80	2	12	12
Government	22	6	70	2	16	15
Information	20	2	77	1	18	18
Leisure & Hospitality	30	7	60	3	23	26
Manufacturing - Durable Goods	17	7	74	2	10	14
Manufacturing - Nondurable Goods	14	6	77	3	8	12
Other Services	17	5	75	3	12	14
Professional & Business Services	20	7	71	2	13	16
Transportation & Utilities	21	7	69	3	14	22
Wholesale & Retail Trade	27	5	66	2	22	24

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 1 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.

Net Employment Outlook Q1 2016	Metropolitan Statistical Areas
35%	Cape Coral
28%	Washington DC
26%	Honolulu
25%	Dallas, Grand Rapids, Provo
24%	McAllen, Tampa
23%	Albany, Austin, Buffalo, Columbus, Deltona, Greenville, Knoxville, Miami, Phoenix
22%	Stockton
21%	Allentown, Lakeland, Oxnard, Richmond, Sacramento, Wichita
20%	Dayton, Louisville, Salt Lake City
19%	Columbia, Denver, Des Moines, Harrisburg, Milwaukee, Riverside, San Francisco
18%	Charlotte, Nashville, Raleigh
17%	Augusta, Birmingham, Jacksonville, North Port, Orlando, Pittsburgh, San Diego, Winston-Salem
16%	Detroit, Greensboro, Las Vegas, Seattle, Springfield
15%	Baltimore, New Haven, Palm Bay, San Jose
14%	Boise City, Chattanooga, New Orleans, San Antonio, Tucson
13%	Boston, Cincinnati, El Paso, Madison, Ogden, Philadelphia, Scranton, Toledo
12%	Bakersfield, Little Rock, New York, St. Louis
11%	Atlanta, Charleston, Colorado Springs
10%	Albuquerque, Baton Rouge, Houston, Indianapolis, Minneapolis, Omaha, Spokane, Virginia Beach
9%	Bridgeport, Los Angeles, Memphis, Oklahoma City, Providence
8%	Fresno, Portland
7%	Akron, Jackson, Rochester, Syracuse
6%	Cleveland, Youngstown
4%	Tulsa, Worcester
3%	Kansas City
2%	Chicago
1%	Hartford

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

Global Employment Outlook

ManpowerGroup interviewed over 58,000 employers across 42 countries and territories to forecast labor market activity* in Quarter 1 2016. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of March 2016 as compared to the current quarter?”

According to the first-quarter research from ManpowerGroup, employers in 39 of 42 countries and territories intend to add to their payrolls by varying degrees at the start of 2016. However, the survey reveals few trends that signal labor market momentum is building in one direction or another. Opportunities for job seekers are expected to remain similar to those available in the final three months of 2015, and results for the January-March time frame indicate that a small majority of employers are content to either retain current staff or grow payrolls at modest levels while they await more definitive signs in the marketplace.

Employers are encountering some headwinds. For instance, China’s slowdown is evidently impacting labor market activity beyond its Asia Pacific neighbors. Depressed demand for raw materials is pushing mining and extraction sector forecasts down across the globe, including in Colombia, Peru and South Africa where sector forecasts are the least optimistic yet reported. What’s more, many ManpowerGroup operations corroborate the recent Talent Shortage Survey and report that employers continue to be frustrated by their inability to source specific talents—including IT, engineering and many skilled trades.

Overall, forecasts are mixed in comparison to the Quarter 4 2015 and Quarter 1 2015 surveys; hiring plans improve in 23 of 42 countries and territories when compared quarter-over-quarter, decline in 13, and are unchanged in six. Outlooks strengthen in 19 countries and territories year-over-year, weaken in 18, and are unchanged in five. First-quarter hiring confidence is strongest in India, Taiwan, Japan, Turkey and the United States. The weakest—and only negative—forecasts are reported in Brazil, Finland and France.

Workforce gains are forecast in 22 of 24 countries in the Europe, Middle East & Africa (EMEA) region.

Hiring plans improve in 14 countries quarter-over-quarter and weaken in only seven. In a year-over-year comparison, Outlooks improve in 12 countries and decline in eight. Once again, Turkish job seekers will likely benefit from the strongest employer hiring plans in the EMEA region. Additionally, employers in Slovakia report their most optimistic hiring plans since their survey was launched in Quarter 4 2011, while employers in Italy report their first positive hiring expectations since Quarter 1 2011. Employers in Finland and France report the upcoming quarter’s weakest EMEA forecasts.

Payrolls are expected to increase in all eight Asia Pacific countries and territories. When compared to the prior quarter, Net Employment Outlooks improve in four countries and territories and decline in two. However, employer forecasts are trending weaker in a year-over-year comparison with the hiring pace expected to slow by varying margins in five countries and territories and strengthen in only two. For the second consecutive quarter, employers in India report the most optimistic forecast across the globe, while the region’s weakest forecast is reported by employers in China.

Positive Outlooks are reported in nine of the 10 countries surveyed in the Americas. Hiring confidence strengthens in five countries and declines in four when compared to the final three months of 2015. Year-over-year, employers in five countries report improved hiring prospects, while those in the remaining five report weaker forecasts. For the third consecutive quarter employers in the United States report the strongest hiring plans in the Americas, and for the fourth consecutive quarter employers in Brazil report the weakest.

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/press/meos. The next Manpower Employment Outlook Survey will be released on 8 March 2016 and will detail expected labor market activity for the second quarter of 2016.

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

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 over 58,000 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 1Q 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 March 2016 as compared to the current quarter?"

Methodology

The Manpower Employment Outlook Survey is conducted using a validated methodology, in accordance with the highest standards in market research. The survey has been structured to be representative of each national economy. The margin of error for all national, regional and global data is not greater than +/- 3.9%.

Net Employment Outlook

Throughout this report, we use the term "Net Employment Outlook." This figure is derived by taking the percentage of employers anticipating an increase in hiring activity and subtracting from this the percentage of employers expecting to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook. Net Employment Outlooks for countries and territories that have accumulated at least 17 quarters of data are reported in a seasonally adjusted format unless otherwise stated.

Seasonal adjustments have been applied to the data for all participating countries except Finland, 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.

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.

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

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