

Q1 / 2009

Manpower  
Employment  
Outlook Survey  
United States

A Manpower Research Report



Manpower®

# Q1/20

## Contents

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United States Employment Outlook	1
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Regional Comparisons

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Global Employment Outlook	7
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About the Survey	8
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About Manpower	9
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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.

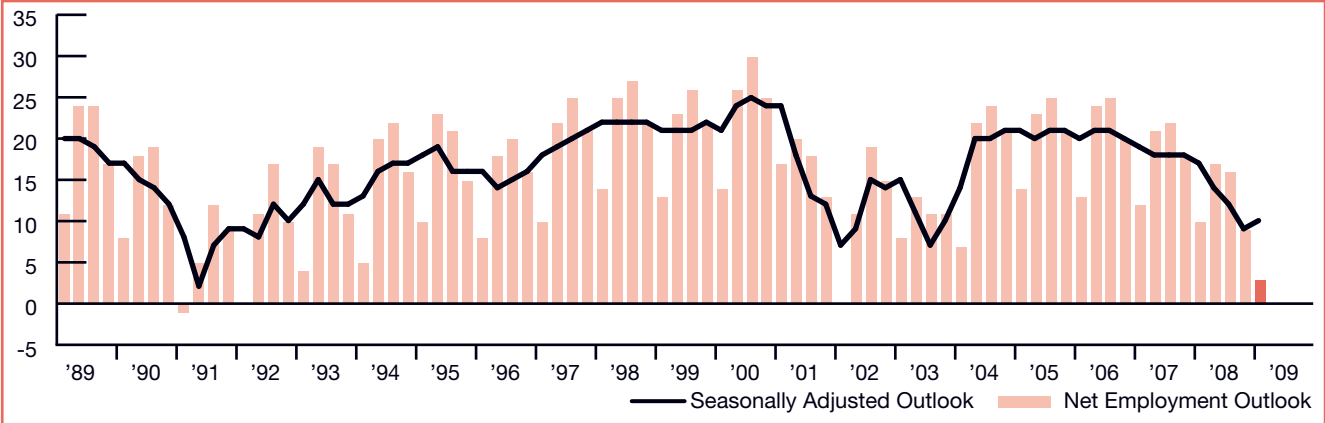
# United States Employment Outlook

Interviews were conducted with 31,800 employers within 201 Metropolitan Statistical Areas (MSAs) in the United States and Puerto Rico to measure employment trends between January and March 2009. 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 2009 as compared to the current quarter?”

Among U.S. employers surveyed, 16% foresee an increase in hiring activity, and 13% expect a decline in staff levels during Quarter 1 2009. Sixty-seven percent anticipate no change in the hiring pace, while 5% are undecided about their January – March hiring plans.

When seasonal variations are removed from the data, the results show that employers expect stable hiring conditions compared to Quarter 4 2008. The first quarter Net Employment Outlook for the U.S. is moderately weaker than one year ago at this time.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>1st Quarter 2009</b>	<b>16</b>	<b>13</b>	<b>67</b>	<b>5</b>	<b>3</b>	<b>10</b>
4th Quarter 2008	22	13	59	6	9	9
3rd Quarter 2008	26	10	58	6	16	12
2nd Quarter 2008	26	9	60	5	17	14
1st Quarter 2008	22	12	60	6	10	17



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.

## Manpower Employment Outlook Survey United States

Employers in eight of the 13 industry sectors surveyed anticipate an increase in staff levels, according to survey data. For Quarter 1 2009, Mining and Professional & Business Services employers have the most promising hiring outlook. Wholesale & Retail Trade, Financial Activities, Education & Health Services, Leisure & Hospitality, Other Services and Government

expect favorable hiring activity. Information employers expect stable hiring conditions, while Durable and Nondurable Goods Manufacturing and Transportation & Utilities anticipate a decline in employment levels. Construction employers have the weakest employment outlook for Quarter 1 2009.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
Construction	10	22	62	5	-12	-
Education & Health Services	13	6	76	4	7	-
Financial Activities	15	10	71	4	5	-
Government	12	10	72	6	2	-
Information	12	11	70	6	1	-
Leisure & Hospitality	21	14	62	4	7	-
Manufacturing – Durable Goods	15	17	64	4	-2	-
Manufacturing – Nondurable Goods	13	15	68	5	-2	-
Mining	25	13	58	4	12	-
Other Services	13	9	75	4	4	-
Professional & Business Services	23	12	60	5	11	-
Transportation & Utilities	14	16	66	4	-2	-
Wholesale & Retail Trade	20	13	63	4	7	-

According to seasonally adjusted regional data, employers in the Midwest anticipate a slight increase in hiring for Quarter 1 2009, while employers in the South foresee stable hiring plans compared to Quarter 4 2008. In the Northeast, employers are slightly less likely to add staff, and employers in the West are moderately less optimistic about hiring.

Across all regions, employers in the Midwest and South share the most favorable hiring outlook, while employers in the West foresee the least promising job prospects for Quarter 1 2009.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
Midwest	15	13	69	4	2	10
Northeast	15	13	67	5	2	9
South	17	12	67	4	5	10
West	15	15	65	5	0	5

### Industry sector adjustments

Effective with the Quarter 1 2009 report, the 13 industries in the survey follow the North American Industry Classification System (NAICS) Supersectors, with Durable and Nondurable Goods Manufacturing reported separately.

This mix of industries is structured to be representative of the U.S. economy. Because of the adjustment, seasonally adjusted data for individual industries is not currently available. In addition, statistics for the Mining sector are reported only in the national survey data to ensure statistical accuracy.

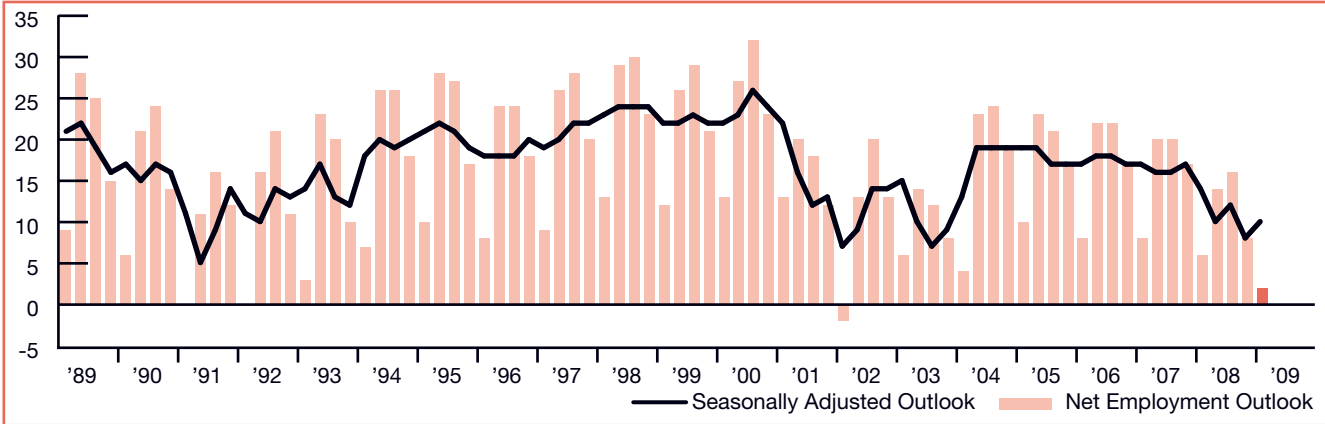
# Regional Comparisons

## Midwest +2 (10)%

In the Midwest, 15% of employers surveyed anticipate increasing staff levels for Quarter 1 2009, and 13% expect to decrease staff, resulting in a Net Employment Outlook of +2%. On a seasonally adjusted basis, the employment forecast is slightly stronger than Quarter 4 2008, with a moderately weaker outlook compared to one year ago at this time. Employers in the Midwest and South share the most promising employment outlook compared with the other regions surveyed.

Among the 12 industry sectors surveyed in the Midwest, nine industries indicate positive hiring intentions in Quarter 1 2009. Business & Professional Services employers have the most favorable hiring plans. Financial Activities, Education & Health Services, Leisure & Hospitality, Other Services, Nondurable Goods Manufacturing, Transportation & Utilities, Wholesale & Retail Trade and Information also foresee increases in hiring activity. Durable Goods Manufacturing and Government expect stable hiring plans, and Construction employers indicate the weakest hiring pace.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries</b>	<b>15</b>	<b>13</b>	<b>69</b>	<b>4</b>	<b>2</b>	<b>10</b>
Construction	10	28	59	3	-18	-
Education & Health Services	11	5	79	4	6	-
Financial Activities	14	9	74	4	5	-
Government	8	8	79	6	0	-
Information	11	9	76	5	2	-
Leisure & Hospitality	19	14	63	4	5	-
Manufacturing – Durable Goods	18	18	61	3	0	-
Manufacturing – Nondurable Goods	16	13	67	3	3	-
Other Services	14	8	75	3	6	-
Professional & Business Services	22	12	62	4	10	-
Transportation & Utilities	15	13	67	6	2	-
Wholesale & Retail Trade	17	14	66	3	4	-



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

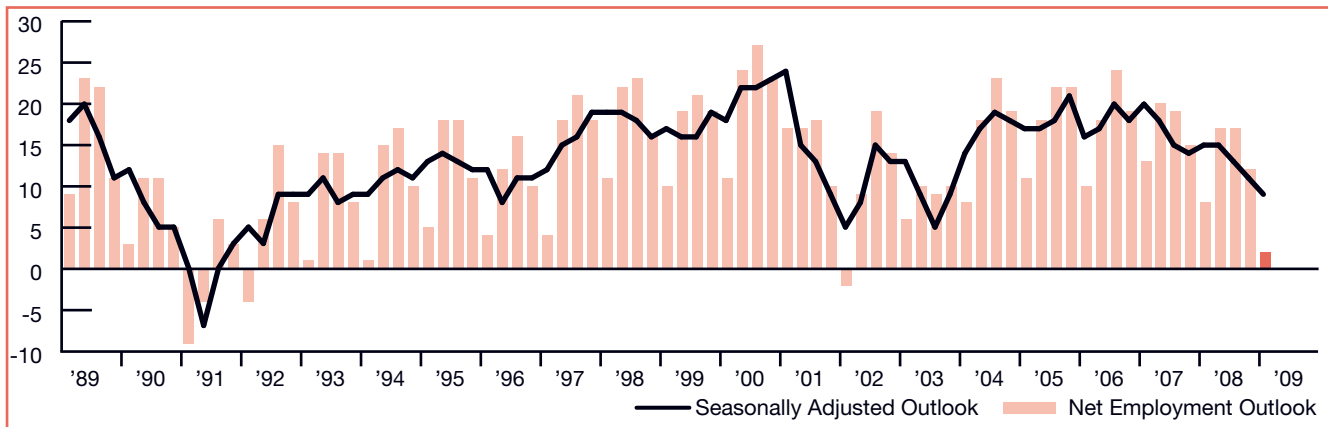
The Midwest Region comprises the following states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries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

Northeast +2 (9)%

Fifteen percent of employers in the Northeast anticipate an increase in staff, while 13% expect a decrease in hiring, resulting in a Net Employment Outlook of +2% for Quarter 1 2009. The seasonally adjusted survey data shows hiring intentions decreased slightly from Quarter 4 2008, and reflects a moderate decrease compared to one year ago at this time.

Eight of the 12 industry sectors surveyed expect hiring increases for Quarter 1 2009. Professional & Business Services and Education & Health Services show the most promising employment outlooks. Durable Goods Manufacturing, Wholesale & Retail Trade, Leisure & Hospitality, Other Services, Government and Financial Activities also anticipate increases in hiring activity. Employers in Information, Nondurable Goods Manufacturing and Transportation & Utilities expect decreases in staff levels. The Construction sector anticipates the least favorable hiring expectations in Quarter 1 2009.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries</b>	<b>15</b>	<b>13</b>	<b>67</b>	<b>5</b>	<b>2</b>	<b>9</b>
Construction	9	27	59	6	-19	-
Education & Health Services	13	5	78	5	8	-
Financial Activities	15	9	71	6	6	-
Government	10	7	74	8	3	-
Information	10	11	71	8	-1	-
Leisure & Hospitality	20	17	61	3	3	-
Manufacturing – Durable Goods	17	14	65	4	3	-
Manufacturing – Nondurable Goods	13	17	65	6	-4	-
Other Services	11	7	79	3	4	-
Professional & Business Services	20	11	62	6	9	-
Transportation & Utilities	14	16	65	6	-2	-
Wholesale & Retail Trade	18	14	63	5	4	-



Revised methodology effective Quarter 1 2009.

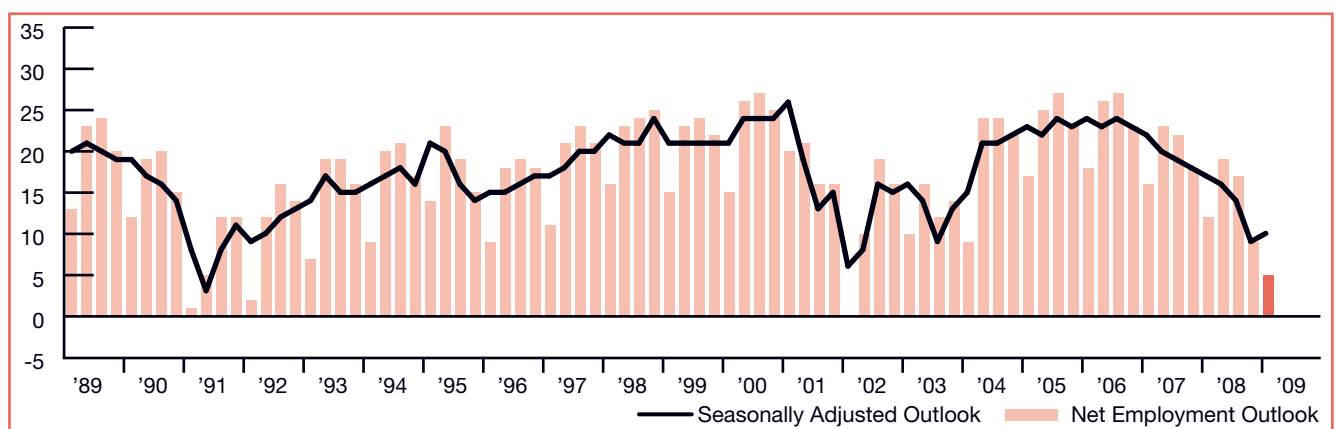
The Northeast Region comprises the following states: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries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

## South +5 (10)%

Seventeen percent of employers surveyed in the South anticipate an increase in staff levels, while 12% expect to trim payrolls, resulting in a Net Employment Outlook of +5%. When adjustments are made for seasonal variations, the data shows that employers expect hiring conditions to be similar to Quarter 4 2008, while a look at one year ago at this time indicates a considerably weaker hiring pace. Across all regions, the South shares the most favorable hiring outlook with the Midwest for Quarter 1 2009.

Among the 12 industry sectors surveyed, Leisure & Hospitality and Professional & Business Services indicate the strongest employment outlook for Quarter 1 2009. Other sectors that anticipate adding staff are Wholesale & Retail Trade, Education & Health Services, Other Services, Government, Information and Financial Activities. Durable and Nondurable Goods Manufacturing and Transportation & Public Utilities employers are less optimistic about hiring. Construction employers anticipate the slowest hiring pace among industry sectors surveyed in the South.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries</b>	<b>17</b>	<b>12</b>	<b>67</b>	<b>4</b>	<b>5</b>	<b>10</b>
Construction	12	17	66	6	-5	-
Education & Health Services	14	6	76	4	8	-
Financial Activities	14	10	72	4	4	-
Government	14	9	71	5	5	-
Information	15	12	68	6	3	-
Leisure & Hospitality	25	11	60	4	14	-
Manufacturing – Durable Goods	14	17	65	5	-3	-
Manufacturing – Nondurable Goods	11	15	70	5	-4	-
Other Services	13	8	75	4	5	-
Professional & Business Services	23	11	62	5	12	-
Transportation & Utilities	14	15	67	4	-1	-
Wholesale & Retail Trade	21	13	62	4	8	-



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

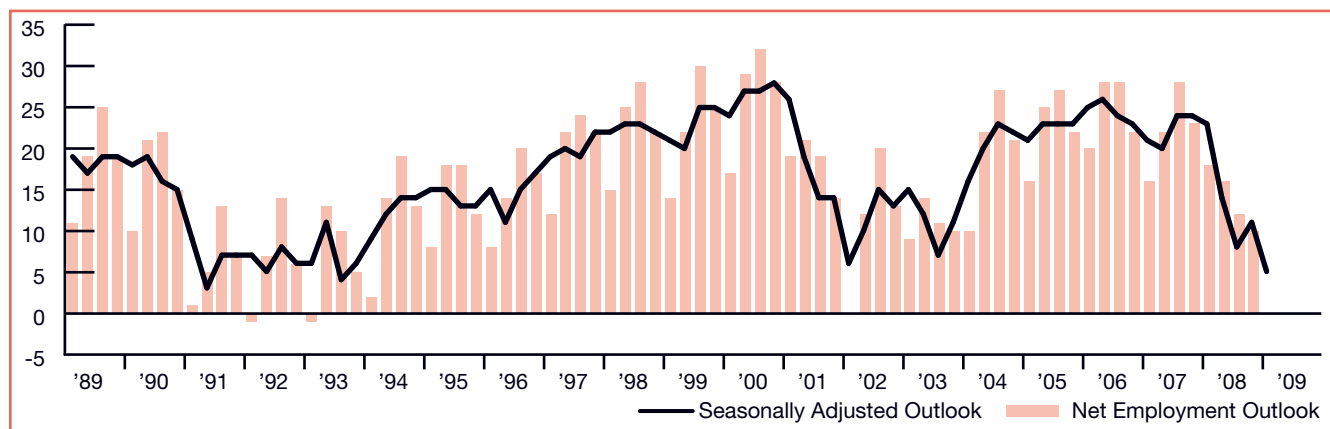
The South Region comprises Puerto Rico and the following states: Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries is not currently available.

### West 0 (5)%

In the West, 15% of employers surveyed are likely to increase staff, while 15% anticipate a decrease in staff, resulting in a Net Employment Outlook of 0%, for Quarter 1 2009. According to seasonally adjusted survey results, employers in the West anticipate a moderate decrease in hiring compared to Quarter 4 2008, and a considerable decrease in hiring compared to one year ago at this time. Of the regions surveyed, the West shows the least favorable hiring outlook for Quarter 1 2009.

Professional & Business Services shows the best hiring prospects among the 12 industry sectors surveyed in the West. In addition, Wholesale & Retail Trade, Education & Health Services and Financial Activities employers plan to increase hiring for the January – March period. Other Services, Durable and Nondurable Goods Manufacturing, Government, Information, Leisure & Hospitality and Transportation & Utilities employers anticipate decreased hiring activity. Construction employers expect the greatest decline in hiring for Quarter 1 2009.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries</b>	<b>15</b>	<b>15</b>	<b>65</b>	<b>5</b>	<b>0</b>	<b>5</b>
Construction	10	25	58	7	-15	-
Education & Health Services	14	7	74	5	7	-
Financial Activities	16	12	68	5	4	-
Government	13	15	66	6	-2	-
Information	12	13	68	7	-1	-
Leisure & Hospitality	15	16	65	4	-1	-
Manufacturing – Durable Goods	13	19	64	4	-6	-
Manufacturing – Nondurable Goods	12	16	67	5	-4	-
Other Services	13	12	72	3	1	-
Professional & Business Services	25	13	56	6	12	-
Transportation & Utilities	12	19	66	3	-7	-
Wholesale & Retail Trade	21	13	61	5	8	-



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

Over 71,000 employers have been interviewed across 33 countries and territories to measure anticipated employment trends\* between January and March 2009.

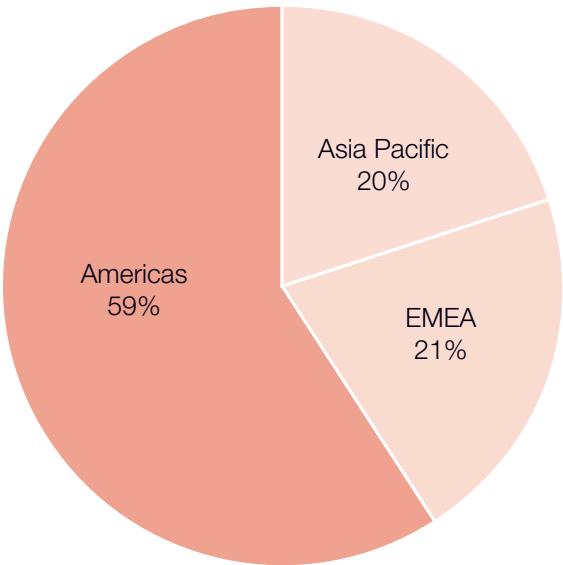
Employers in 25 of the countries and territories Manpower surveyed expect to add to their workforces in Quarter 1 2009, while employers in eight countries report negative hiring expectations. Overall, the vast majority of employers expect to ease the pace of hiring compared to three months ago, with employers in only three countries – Canada, the United States and Switzerland – reporting improved Outlooks compared to Quarter 4 2008. Notably, employers in 21 countries and territories are reporting the weakest hiring intentions since the survey began in their respective countries and territories. Where year-over-year data is available, Outlooks in 25 countries and territories have declined compared to last year at this time.

Quarter 1 employment prospects are most favorable in Peru, India, Costa Rica, Canada, Romania, Colombia, South Africa, Australia, Poland, the United States and China. Employer hiring expectations are weakest in Singapore, Ireland, Spain and Italy.

On a regional basis, employers in the Americas continue to report positive Net Employment Outlooks; however, where year-over-year data is available, employers in all countries except Canada are reporting weaker Outlooks compared to 12 months ago. Employers in Peru, Costa Rica and Canada are the most optimistic about adding employees in the region. The Outlook in the United States has improved slightly quarter-over-quarter, while employer forecasts in Mexico signal that the contraction first noted in Quarter 4 2008 is accelerating. In the Asia Pacific region, job prospects are decidedly less optimistic with employers in all eight countries and territories surveyed reporting weaker hiring plans compared to the previous quarter and one year ago. In the Europe, Middle East & Africa (EMEA) region, Outlooks decline in 16 of 17 countries from three months ago, with only Swiss employers anticipating a slight improvement. Outlooks have declined in 12 of 13 European countries where year-over-year comparisons are possible.

\* Comments in this section are based on seasonally adjusted data where available.

## Survey Respondents by Region



Research for the Quarter 1 2009 Manpower Employment Outlook Survey involved surveying over 71,000 human resource directors and senior hiring managers from public and private organizations worldwide: 59% of the respondents came from eight countries in the Americas; 21% from 17 countries in EMEA; and 20% from eight countries and territories across Asia Pacific.

Full survey results for each of the 33 countries and territories included in this quarter's survey, plus regional and global comparisons, can be found at the Manpower Press Room at [www.manpower.com/meos](http://www.manpower.com/meos) 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 for more than 45 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 in which it is conducted. The survey participants are not derived from Manpower's customer base.

**Robust:** The survey is based on interviews with over 71,000 public and private employers across 33 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 four 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 2009 as compared to the current quarter?"

## Methodology

The Manpower Employment Outlook Survey in the U.S. is conducted using a validated methodology in accordance with the highest standards in market research. The mix of industries within the survey follows the North American Industry Classification System (NAICS) Supersectors and is structured to be representative of the United States economy. The survey is conducted by an independent, third-party research firm and includes a select sample of 31,800 employers located within 200 Metropolitan Statistical Areas (as defined by the U.S. government) in the U.S. and one in Puerto Rico. With this number of interviews, the overall U.S. survey carries a margin of error of 0.55%, with a 95% confidence index.

## Net Employment Outlook

The key statistic we use throughout this report 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. The result of this calculation is the Net Employment Outlook.

## Seasonal Adjustment

Seasonal adjustments have been applied to the survey data by research professionals at the University of Wisconsin-Milwaukee. 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.

## MSA Results

Complete results for the 201 MSAs, plus the complete results and visuals for the United States Manpower Employment Outlook Survey, are available for viewing and download at: [www.us.manpower.com/meos](http://www.us.manpower.com/meos)

## About Manpower Inc.

Manpower Inc. (NYSE: MAN) is a world leader in the employment services industry; creating and delivering services that enable its clients to win in the changing world of work. Celebrating its 60th anniversary in 2008, the \$21 billion company offers employers a range of services 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 4,500 offices in 80 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 on Manpower Inc. is available at [www.manpower.com](http://www.manpower.com).

## About Manpower United States

In the United States, Manpower provides a wide range of employment services that allow companies to anticipate and benefit from the changes happening now and next in the contemporary world of work. Manpower is more than its core of temporary industrial, contact center and administrative recruiting, assessment and selection. In addition to recruiting and screening for permanent positions, Manpower supports clients' cost savings through its managed service programs. Under the Manpower Professional brand, the company places superior talent in areas such as information technology, scientific, engineering, finance and telecommunications. The company fulfills clients' recruitment process outsourcing needs through Manpower Business Solutions. More information about Manpower's U.S. operations can be found at [www.us.manpower.com](http://www.us.manpower.com).

## History of the Survey

- 1962** 1st 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** 2nd 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** 3rd generation of the Manpower Employment Outlook Survey is launched, expanding the program to a total 18 countries and territories worldwide: Australia, Austria, Belgium, Canada, France, Germany, Hong Kong, Ireland, Italy, Japan, Mexico, Netherlands, Norway, Singapore, Spain, Sweden, United Kingdom and 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, Peru and South Africa 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.
- 2007** Manpower operations in Argentina launch 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** Beginning in the first quarter, Manpower's United States operation adopts new survey methodology and broadens panel to be more representative of the United States economy.

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