

**ManpowerGroup  
Employment  
Outlook Survey  
United States**

**Q4  
2017**



ManpowerGroup®

# United States Employment Outlook

More than 11,500 interviews were conducted with employers within the United States, including all 50 states, the top 100 Metropolitan Statistical Areas (MSAs) and the District of Columbia and Puerto Rico, to measure hiring intentions between September and December 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 December 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 4 2017</b>	<b>21</b>	<b>6</b>	<b>71</b>	<b>2</b>	<b>15</b>	<b>17</b>
Quarter 3 2017	24	4	70	2	20	17
Quarter 2 2017	22	3	73	2	19	17
Quarter 1 2017	19	6	73	2	13	16
Quarter 4 2016	22	6	69	3	16	18



In the final quarter of 2017, 21 percent of U.S. employers expect to increase payrolls, while 6 percent anticipate a decrease in employment levels. In addition, 71 percent of U.S. employers expect no change in staffing levels.

Once the data is adjusted to allow for seasonal variation, the Net Employment Outlook for the U.S. is +17%. Nationwide hiring intentions are unchanged when compared with the previous quarter and remain relatively stable when compared with this time one year ago.

Hiring prospects strengthen in two of the four U.S. regions when seasonally adjusted Net Employment Outlooks are compared with the third quarter of 2017. Northeast employers report an increase of 4 percentage points, while the Outlook for the South is 1 percentage point stronger. Employers in the West report no change when compared with the previous quarter, while the Outlook for the Midwest declines by 1 percentage point.

Northeast employers report the strongest hiring intentions in more than 10 years, with a Net Employment Outlook of +18% for the next three months. Outlooks also stand at +18% in the South and the West. Midwest employers report slightly weaker hiring prospects than the other three regions, with an Outlook of +16%.

Employers in the Northeast report slightly stronger hiring plans when compared with the third quarter of 2017. In the Midwest and the South, employers report relatively stable hiring intentions, while the Outlook for the West is unchanged. When compared with this time one year ago, hiring prospects are slightly stronger in the Northeast and remain relatively stable in the West. Employers in the Midwest and the South report no year-over-year change.

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

Employers in all 13 national industry sectors expect to grow staffing levels during the final quarter of 2017: Leisure & Hospitality (+28%), Professional & Business Services (+22%), Wholesale & Retail Trade (+20%), Durable Goods Manufacturing (+18%), Transportation & Utilities (+18%), Construction (+16%), Education & Health Services (+13%), Financial Activities (+13%), Information (+13%), Nondurable Goods Manufacturing (+13%), Mining (+13%), Other Services (+13%), Government (+12%).

When compared with the third quarter of 2017, employers report slightly stronger hiring prospects in four industry sectors nationwide: Construction, Leisure & Hospitality, Other Services and Professional & Business Services. For two of these sectors—Other Services and Professional & Business Services—hiring intentions are stronger than at any point since they were first analyzed nine years ago.

Hiring plans remain relatively stable in the following nationwide industry sectors when compared with Quarter 3 2017: Education & Health Services, Government, Information, Durable Goods Manufacturing, Nondurable Goods Manufacturing and Wholesale & Retail Trade. The Net Employment Outlook for the Durable Goods Manufacturing sector in the coming quarter is the strongest reported in 10 years.

Nationally, employers report moderately weaker hiring intentions in the Mining sector when compared with the previous quarter. In two nationwide industry sectors—Financial Activities and Transportation & Utilities—hiring prospects are slightly weaker.

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

Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2017	Seasonally Adjusted
	%	%	%	%	%	%
Construction	20	8	70	2	12	16
Education & Health Services	19	4	75	2	15	13
Financial Activities	16	3	80	1	13	13
Government	16	7	74	3	9	12
Information	17	5	76	2	12	13
Leisure & Hospitality	32	11	56	1	21	28
Manufacturing – Durable Goods	19	3	76	2	16	18
Manufacturing – Nondurable Goods	17	5	76	2	12	13
Mining	18	7	73	2	11	13
Other Services	15	5	79	1	10	13
Professional & Business Services	24	4	70	2	20	22
Transportation & Utilities	22	6	70	2	16	18
Wholesale & Retail Trade	27	6	66	1	21	20

# Regional Comparisons

**+14 (+16)%**

## Midwest

Employment levels are expected to increase in the final quarter of 2017 by 20 percent of businesses surveyed in the Midwest, while 6 percent anticipate a decrease. The resulting Net Employment Outlook stands at +14%. Once the data is adjusted to allow for seasonal variation, hiring intentions remain relatively stable when compared with Quarter 3 2017, and are unchanged when compared with this time one year ago.

Hiring plans strengthen slightly in three Midwest industry sectors when compared with the third quarter of 2017: Construction, Information and Leisure & Hospitality.

In five industry sectors in the region, employers report relatively stable hiring prospects: Financial Activities, Nondurable Goods Manufacturing, Professional & Business Services, Transportation & Utilities and Wholesale & Retail Trade.

Moderately weaker hiring intentions are reported by employers in two Midwest industry sectors when compared with Quarter 3 2017: Education & Health Services and Government. Meanwhile, job seekers in two sectors can expect a slightly weaker hiring climate: Durable Goods Manufacturing and Other Services.



Industry	Increase %	Decrease %	No Change %	Don't Know %	Net Employment Outlook Q4 2017 %	Seasonally Adjusted %
<b>All Industries – Midwest</b>	<b>20</b>	<b>6</b>	<b>72</b>	<b>2</b>	<b>14</b>	<b>16</b>
Construction	16	10	71	3	6	12
Education & Health Services	14	5	79	2	9	9
Financial Activities	12	3	85	0	9	10
Government	8	11	80	1	-3	3
Information	15	7	77	1	8	9
Leisure & Hospitality	34	10	54	2	24	27
Manufacturing – Durable Goods	17	3	78	2	14	17
Manufacturing – Nondurable Goods	19	1	79	1	18	19
Other Services	13	5	81	1	8	9
Professional & Business Services	24	5	70	1	19	22
Transportation & Utilities	21	5	73	1	16	20
Wholesale & Retail Trade	28	6	64	2	22	21

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

**+15 (+18)%**

## Northeast

With 21 percent of businesses surveyed in the Northeast anticipating an increase in staffing levels during Quarter 4 2017, and 6 percent expecting a decline, the Net Employment Outlook for the region stands at +15%. Once the data is adjusted to allow for seasonal variation, hiring intentions in the Northeast are slightly stronger both quarter-over-quarter and year-over-year, resulting in the strongest Outlook reported for more than 10 years.

Employers in two Northeast industry sectors report considerably stronger hiring plans when compared with the previous quarter: Other Services and Professional & Business Services. Hiring plans also improve moderately in two sectors—Government and Leisure & Hospitality—while slightly stronger hiring intentions are reported in three sectors: Construction, Education & Health Services and Durable Goods Manufacturing.

When compared with the third quarter of 2017, employers in the Information sector in the Northeast report relatively stable hiring prospects.

Hiring plans for the Transportation & Utilities sector in the Northeast are considerably weaker when compared with the previous quarter, while Nondurable Goods Manufacturing employers in the region report a moderate decline. Elsewhere, hiring intentions are slightly weaker in two sectors: Financial Activities and Wholesale & Retail Trade.



Industry	Increase %	Decrease %	No Change %	Don't Know %	Net Employment Outlook Q4 2017 %	Seasonally Adjusted %
<b>All Industries – Northeast</b>	<b>21</b>	<b>6</b>	<b>71</b>	<b>2</b>	<b>15</b>	<b>18</b>
Construction	15	10	74	1	5	12
Education & Health Services	21	4	73	2	17	15
Financial Activities	16	0	83	1	16	17
Government	14	6	76	4	8	11
Information	12	2	82	4	10	8
Leisure & Hospitality	32	15	51	2	17	28
Manufacturing – Durable Goods	18	3	78	1	15	16
Manufacturing – Nondurable Goods	15	3	79	3	12	12
Other Services	14	3	81	2	11	15
Professional & Business Services	27	4	67	2	23	28
Transportation & Utilities	16	7	76	1	9	13
Wholesale & Retail Trade	27	5	66	2	22	19

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

**+17 (+18)%**

## South

Employers in 22 percent of the businesses surveyed in the South expect to add to payrolls during the forthcoming quarter, while 5 percent anticipate a decrease. The resulting Net Employment Outlook stands at +17%. Once the data is adjusted to allow for seasonal variation, the Outlook remains relatively stable quarter-over-quarter and is unchanged when compared with this time one year ago.

Job seekers in the Transportation & Utilities sector can expect a moderately stronger hiring pace in Quarter 4 2017 when compared with the previous quarter, according to employers in the South. Hiring plans are also slightly stronger in the Construction and Professional & Business Services sectors.

In eight of the South's sector labor markets, employers report relatively stable hiring intentions when compared with Quarter 3 2017: Education & Health Services, Government, Information, Leisure & Hospitality, Durable Goods Manufacturing, Nondurable Goods Manufacturing, Other Services and Wholesale & Retail Trade.

Financial Activities sector employers in the region report moderately weaker hiring prospects when compared with the previous quarter.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2017	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – South</b>	<b>22</b>	<b>5</b>	<b>71</b>	<b>2</b>	<b>17</b>	<b>18</b>
Construction	22	5	71	2	17	19
Education & Health Services	18	5	76	1	13	13
Financial Activities	17	3	78	2	14	13
Government	19	6	72	3	13	14
Information	19	4	75	2	15	18
Leisure & Hospitality	32	8	59	1	24	29
Manufacturing – Durable Goods	21	3	74	2	18	19
Manufacturing – Nondurable Goods	16	6	76	2	10	11
Other Services	16	6	76	2	10	11
Professional & Business Services	24	4	70	2	20	19
Transportation & Utilities	25	4	69	2	21	23
Wholesale & Retail Trade	25	5	67	3	20	19

The South Region comprises the District of Columbia and Puerto Rico along with the following states: Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia.

**+16 (+18)%**

## West

Payroll gains are anticipated by 22 percent of businesses surveyed in the West during the next three months. With 6 percent of employers in the region expecting a decrease in staffing levels, the Net Employment Outlook stands at +16%. Once the data is adjusted to allow for seasonal variation, employers report no change in hiring plans when compared with the previous quarter. When compared with the final quarter of 2016, hiring prospects for the region remain relatively stable.

Nondurable Goods Manufacturers based in the West report considerably stronger hiring intentions when compared with the third quarter of 2017, while Durable Goods Manufacturers report a moderate increase in hiring prospects. Elsewhere, employers in four regional industry sectors anticipate a slightly stronger hiring pace when compared with Quarter 3 2017: Financial Activities, Information, Professional & Business Services and Wholesale & Retail Trade.

Employers in three industry sectors report relatively stable hiring plans quarter-over-quarter: Construction, Education & Health Services and Other Services.

Moderately weaker hiring intentions are reported in two of the West's industry sectors when compared with the previous quarter: Government and Transportation & Utilities. Elsewhere, Leisure & Hospitality sector employers report a slight decline in hiring prospects.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2017	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – West</b>	<b>22</b>	<b>6</b>	<b>69</b>	<b>3</b>	<b>16</b>	<b>18</b>
Construction	22	8	66	4	14	17
Education & Health Services	21	3	75	1	18	16
Financial Activities	19	3	77	1	16	16
Government	18	7	72	3	11	17
Information	21	5	73	1	16	16
Leisure & Hospitality	30	11	57	2	19	26
Manufacturing – Durable Goods	18	4	75	3	14	17
Manufacturing – Nondurable Goods	20	8	71	1	12	14
Other Services	15	5	80	0	10	14
Professional & Business Services	24	3	71	2	21	22
Transportation & Utilities	25	9	64	2	16	19
Wholesale & Retail Trade	28	6	63	3	22	23

The West Region comprises the following states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming.

# Metropolitan Statistical Areas

For Quarter 4 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 Q4 2017	Metropolitan Statistical Areas
35%	Cape Coral
27%	Oxnard
26%	Charlotte, Stockton
25%	Deltona, Grand Rapids, Madison, McAllen
24%	Allentown, Worcester
23%	Charleston
22%	Atlanta, Greenville, Minneapolis, Ogden, Provo
21%	Chattanooga, Dallas, Greensboro, Miami, Phoenix, Portland, Raleigh, Rochester, San Jose, Tampa, Virginia Beach, Winston-Salem
20%	Bakersfield, Columbia, Omaha, Salt Lake City
19%	Austin, Harrisburg, Jacksonville, Nashville, Orlando, Sacramento, St. Louis
18%	Baton Rouge, Colorado Springs, Los Angeles, Milwaukee, New Orleans, San Francisco, Springfield
17%	Boise City, El Paso, New York, Tucson
16%	Albuquerque, Detroit, Honolulu, Riverside, Spokane
15%	Augusta, Birmingham, Cincinnati, Fresno, Lakeland, North Port, Philadelphia, Pittsburgh, San Antonio, Scranton, Syracuse, Washington
14%	Bridgeport, Cleveland, Dayton, Memphis, Oklahoma City, Providence, Richmond, Toledo
13%	Buffalo, San Diego, Wichita
12%	Kansas City, Knoxville, Tulsa
11%	Albany, Baltimore, Denver
10%	Columbus, Houston, New Haven, Seattle
9%	Chicago, Hartford, Las Vegas, Louisville, Palm Bay
8%	Boston, Indianapolis, Jackson, Little Rock
6%	Akron, Des Moines
4%	Youngstown

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 59,000 employers across 43 countries and territories to forecast labor market activity\* in Quarter 4 2017. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of December 2017 as compared to the current quarter?”

Fourth-quarter forecasts are mostly positive with employers in 42 of 43 countries and territories expecting workforces to grow by varying margins over the next three months. Only employers in Switzerland forecast a flat fourth-quarter hiring pace. As a result, for the first time since Quarter 2 2008 and the ensuing global recession there are no negative Net Employment Outlooks in any of the 43 countries and territories surveyed. When compared with Quarter 3 2017, Outlooks improve in 23 of the 43 countries and territories, decline in 13 and are unchanged in seven. When compared with this time one year ago, hiring plans strengthen in 25 of the 43 countries and territories, weaken in 15 and are unchanged in three. The most optimistic Net Employment Outlooks are reported in Japan, Taiwan, Costa Rica, India and Hungary. The weakest fourth-quarter hiring plans are reported in Switzerland, Brazil and the Czech Republic.

Employers in all 10 countries in the Americas expect to grow staffing levels by varying degrees in Quarter 4 2017. Hiring prospects improve in five countries when compared to Quarter 3 2017, weaken in two and are unchanged in three. In a year-over-year comparison, employer hiring confidence improves in six countries but weakens in four. Employers in Costa Rica and the United States report the strongest fourth-quarter hiring plans. The weakest hiring climate is expected in Brazil, but employers there report subdued, but positive, hiring plans for the second consecutive quarter following more than two years of negative forecasts.

Payroll growth is forecast in each of the eight Asia Pacific countries and territories, with hiring prospects improving from three months ago in five, declining in two and remaining unchanged in one. When compared to Quarter 4 2016, forecasts strengthen in four countries and territories, decline in three and are unchanged in one. Employers in Japan and Taiwan report the strongest job prospects while the weakest forecast is reported in China.

Across the 25 countries in the Europe, Middle East and Africa (EMEA) region, employers expect some job growth in 24 countries, with only Swiss employers expecting a flat hiring environment. Hiring intentions strengthen in 13 countries when compared with the third quarter, weaken in nine, and are unchanged in three. In the year-over-year comparison employers in 15 countries report stronger forecasts, those in eight expect the hiring pace to slow, while forecasts in two countries remain unchanged. For the second consecutive quarter employers in Hungary report the EMEA region’s strongest forecast. Swiss employers report the weakest fourth-quarter hiring plans.

Full survey results for each of the 43 countries and territories included in this quarter’s survey, plus regional and global comparisons, can be found at

[www.manpowergroup.com/meos](http://www.manpowergroup.com/meos)

The next ManpowerGroup Employment Outlook Survey will be released on 12 December 2017 and will detail expected labor market activity for the first quarter of 2018.

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

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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 59,000 public and private employers across 43 countries and territories to measure anticipated employment trends each quarter. This sample allows for analysis to be performed across specific sectors and regions to provide more detailed information.

**Focused:** For 55 years the survey has derived all of its information from a single question:

For the Quarter 4 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 December 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), the leading global workforce solutions company, helps organizations transform in a fast-changing world of work by sourcing, assessing, developing and managing the talent that enables them to win. We develop innovative solutions for over 400,000 clients and connect 3+ million people to meaningful, sustainable work across a wide range of industries and skills. Our expert family of brands—Manpower®, Experis®, Right Management® and ManpowerGroup® Solutions—creates substantially more value for candidates and clients across 80 countries and territories and has done so for nearly 70 years. In 2017, ManpowerGroup was named one of the World's Most Ethical Companies for the seventh 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 is powering the future of work: [www.manpowergroup.com](http://www.manpowergroup.com).

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