

Q1 / 2010

Manpower  
Employment  
Outlook Survey  
United States

A Manpower Research Report



Manpower®

# O1/10 Q1/10

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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 28,000 interviews have been conducted with employers within 201 Metropolitan Statistical Areas (MSAs) in the United States and Puerto Rico to measure employment trends between January and March 2010. 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 2010 as compared to the current quarter?”

Among U.S. employers surveyed, 12% expect to add to their workforces, and 12% expect a decline in their payrolls during Quarter 1 2010. From January – March, no change in staff levels is anticipated by 73% of employers, which is the highest percentage of U.S.

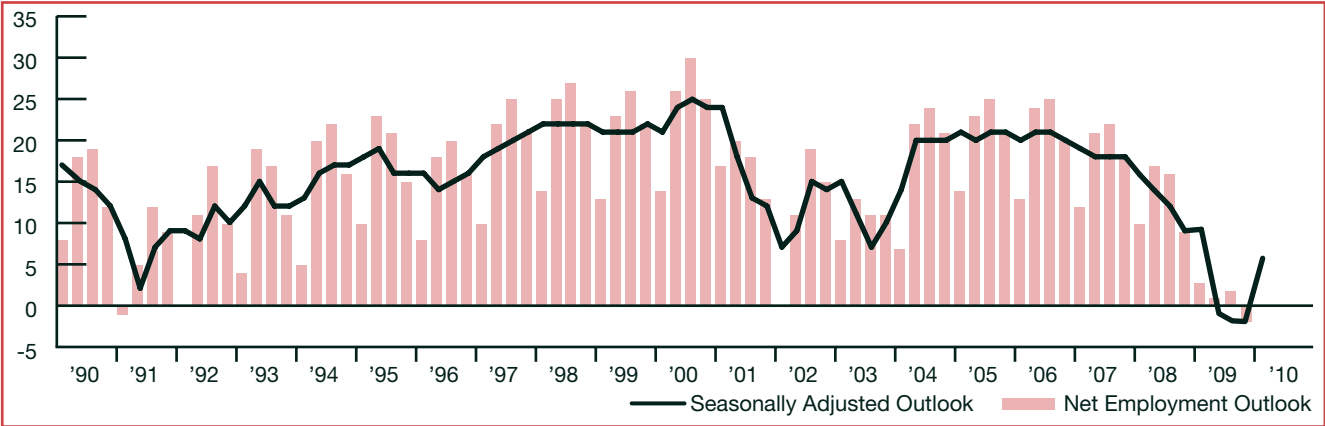
employers anticipating no change in the history of the survey. Three percent of employers are undecided about their Quarter 1 2010 hiring plans.

When seasonal variations are removed from the data, the results suggest that employers expect a moderate increase in the rate of hiring when compared to Quarter 4 2009. However, the first quarter Net Employment Outlook for the U.S. is weaker than one year ago at this time.

According to seasonally adjusted regional data, employers in the Northeast, Midwest and South report a moderate increase in hiring expectations compared to Quarter 4 2009, while employers in the West expect a slight increase in the hiring pace.

Across all regions, employers anticipate a decrease in hiring activity compared to one year ago.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Quarter 1 2010</b>	<b>12</b>	<b>12</b>	<b>73</b>	<b>3</b>	<b>0</b>	<b>6</b>
Quarter 4 2009	12	14	69	5	-2	-2
Quarter 3 2009	15	13	67	5	2	-2
Quarter 2 2009	15	14	67	4	1	-1
Quarter 1 2009	16	13	67	5	3	9



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 2010, employers in seven of the 13 industry sectors surveyed indicate a positive Outlook. Nondurable Goods Manufacturing, Wholesale & Retail Trade, Financial Activities, Professional & Business Services, Education & Health Services, Leisure & Hospitality, and Other Services anticipate a promising hiring pace. The Outlook is neutral among employers in Information in Quarter 1 2010, while employers report a negative hiring Outlook in the Mining, Construction, Durable Goods Manufacturing, Transportation & Utilities and Government industry sectors.

When the industry sector data is compared quarter-over-quarter, employers in 10 of the 13 industry sectors surveyed are more positive about employment

prospects compared to Quarter 4 2009. In Quarter 1 2010, employers predict moderate hiring increases in Mining, Durable Goods Manufacturing, Information and Government. Slight hiring increases are anticipated in Nondurable Goods Manufacturing, Transportation & Utilities, Professional & Business Services, Education & Health Services, Leisure & Hospitality and Other Services. Employers in the Construction and Wholesale & Retail Trade sectors intend to slightly decrease staff levels, while Financial Activities employers expect staff levels to remain relatively stable.

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 2010	Net Employment Outlook Q4 2009
	%	%	%	%	%	%
Construction	10	22	62	6	-12	-10
Education & Health Services	10	6	80	4	4	2
Financial Activities	10	8	80	2	2	1
Government	9	12	75	4	-3	-8
Information	10	10	75	5	0	-5
Leisure & Hospitality	16	12	69	3	4	2
Manufacturing – Durable Goods	11	14	71	4	-3	-8
Manufacturing – Nondurable Goods	11	10	75	4	1	-3
Mining	12	13	71	4	-1	-9
Other Services	9	7	81	3	2	-1
Professional & Business Services	16	11	70	3	5	3
Transportation & Utilities	10	16	70	4	-6	-9
Wholesale & Retail Trade	16	12	69	3	4	7

## Regional Comparisons

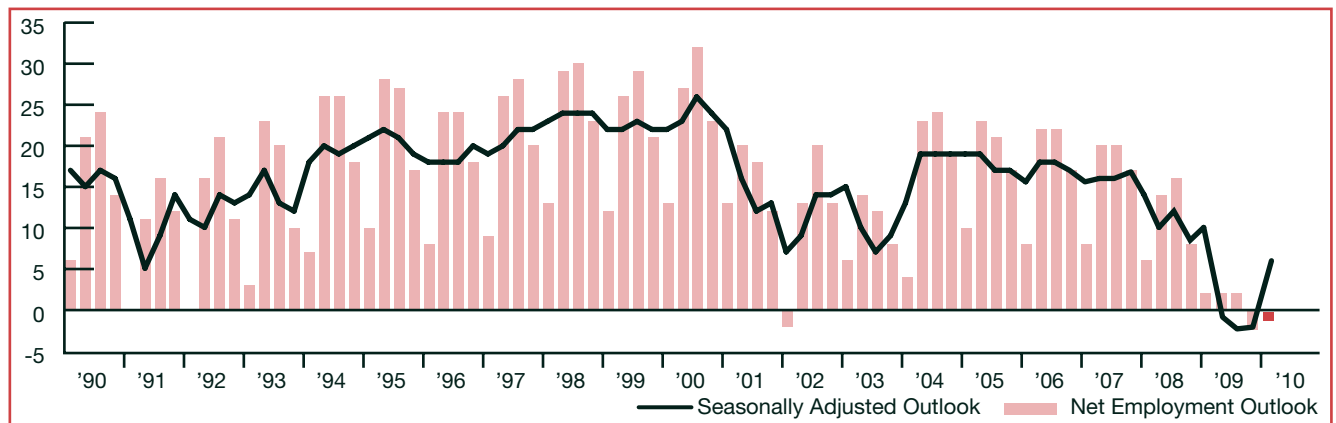
### Midwest -1 (6)%

In the Midwest, 11% of employers surveyed expect to increase staff levels for Quarter 1 2010 and 12% anticipate a decrease in the hiring pace, leading to a Net Employment Outlook of -1%. When seasonal variations are removed from the data, the employment forecast for Quarter 1 2010 is slightly weaker when compared to one year ago at this time, but shows a moderate increase compared to Quarter 4 2009.

Employers in six of the 12 industry sectors surveyed in the Midwest predict an increase in hiring activity for Quarter 1 2010 compared to Quarter 4 2009 expectations. Nondurable Goods Manufacturing and

Education & Health Services employers anticipate a moderate increase in hiring activity, while employers in Durable Goods Manufacturing, Transportation & Utilities, Information and Government expect slight increases. Employers in Financial Activities and Professional & Business Services foresee a slight decrease in the hiring pace compared to three months ago. Construction employers report a moderate decrease in hiring. Wholesale & Retail Trade, Leisure & Hospitality and Other Services employers expect the hiring pace to remain relatively stable.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Midwest</b>	<b>11</b>	<b>12</b>	<b>73</b>	<b>4</b>	<b>-1</b>	<b>6</b>
Construction	9	27	59	5	-18	–
Education & Health Services	9	5	81	5	4	–
Financial Activities	10	9	80	1	1	–
Government	6	15	74	5	-9	–
Information	9	13	74	4	-4	–
Leisure & Hospitality	14	10	74	2	4	–
Manufacturing – Durable Goods	13	13	69	5	0	–
Manufacturing – Nondurable Goods	14	9	70	7	5	–
Other Services	8	7	83	2	1	–
Professional & Business Services	13	10	72	5	3	–
Transportation & Utilities	12	16	67	5	-4	–
Wholesale & Retail Trade	18	11	69	2	7	–



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.

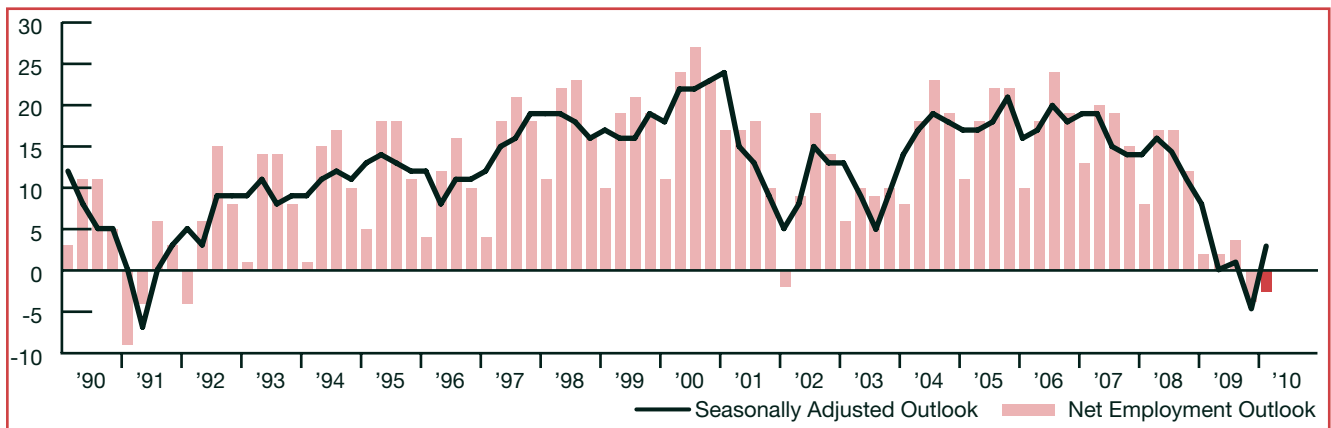
### Northeast -3 (3)%

Ten percent of employers surveyed in the Northeast look to increase staff levels, while 13% expect to decrease payrolls, resulting in a Net Employment Outlook of -3% for Quarter 1 2010. The seasonally adjusted survey data reflects a moderate increase in the hiring pace compared to Quarter 4 2009. Employers expect a moderate decrease in hiring compared to one year ago at this time.

Among the 12 industry sectors surveyed, employers in Durable Goods Manufacturing, Information and Financial Activities anticipate a moderate increase in hiring for

Quarter 1 2010 when compared to three months ago. A slight increase in the hiring pace is expected among employers in Professional & Business Services and Other Services. Employers in three industry sectors, Construction, Transportation & Utilities and Wholesale & Retail Trade, anticipate decreases in staffing levels. Nondurable Goods Manufacturing, Education & Health Services, Leisure & Hospitality and Government employers expect employment rates to be stable compared to Quarter 4 2009.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Northeast</b>	<b>10</b>	<b>13</b>	<b>73</b>	<b>4</b>	<b>-3</b>	<b>3</b>
Construction	8	27	60	5	-19	–
Education & Health Services	8	4	86	2	4	–
Financial Activities	10	7	78	5	3	–
Government	6	10	78	6	-4	–
Information	9	12	74	5	-3	–
Leisure & Hospitality	13	18	65	4	-5	–
Manufacturing – Durable Goods	10	13	72	5	-3	–
Manufacturing – Nondurable Goods	10	10	75	5	0	–
Other Services	5	6	85	4	-1	–
Professional & Business Services	16	12	69	3	4	–
Transportation & Utilities	10	22	66	2	-12	–
Wholesale & Retail Trade	15	16	64	5	-1	–



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.

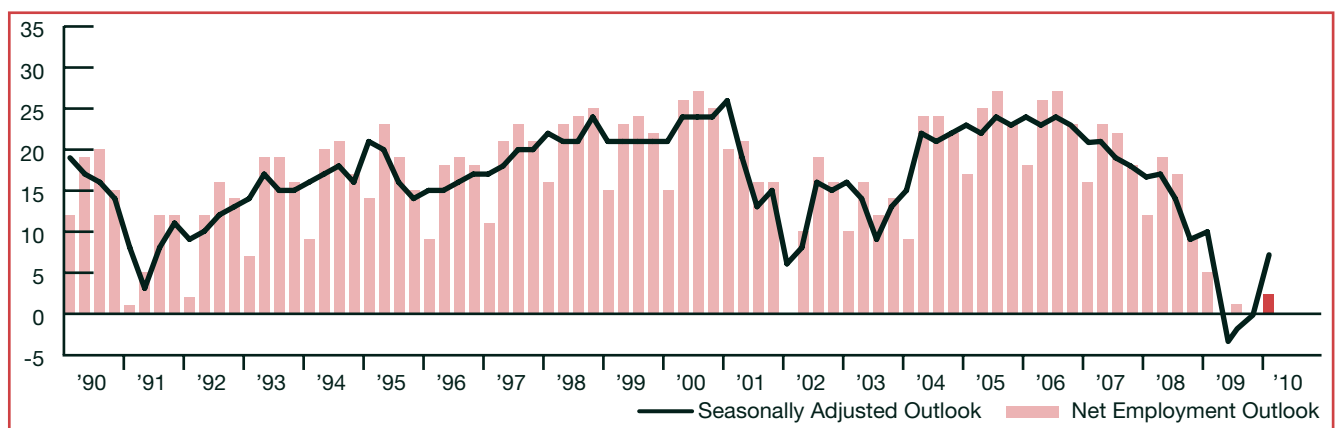
## South +2 (7)%

In the South, 12% of employers surveyed expect to take on more staff, and 10% plan to decrease employee levels, resulting in a Net Employment Outlook of +2%. When seasonal variations are removed from the data, the Quarter 1 2010 employment forecast is slightly weaker compared to one year ago at this time but moderately stronger than Quarter 4 2009. Employers in the South have the strongest Outlook among the four U.S. regions for Quarter 1 2010.

Employers in all 12 industry sectors surveyed in the South anticipate stable or strengthening job prospects for Quarter 1 2010 when compared to Quarter 4 2009,

when a majority of industry sectors surveyed anticipated weakening job prospects. Information, Education & Health Services and Government industry sector employers predict moderate increases. Durable and Nondurable Goods Manufacturing, Transportation & Utilities, Professional & Business Services and Other Services anticipate slight increases during Quarter 1 2010. Employers in the remaining four industry sectors, Construction, Wholesale & Retail Trade, Financial Activities and Leisure & Hospitality report no changes from the October – December period.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – South</b>	<b>12</b>	<b>10</b>	<b>74</b>	<b>4</b>	<b>2</b>	<b>7</b>
Construction	10	18	65	7	-8	–
Education & Health Services	12	5	78	5	7	–
Financial Activities	9	8	81	2	1	–
Government	11	8	77	4	3	–
Information	11	8	75	6	3	–
Leisure & Hospitality	19	11	68	2	8	–
Manufacturing – Durable Goods	10	14	71	5	-4	–
Manufacturing – Nondurable Goods	10	9	77	4	1	–
Other Services	11	7	80	2	4	–
Professional & Business Services	17	10	70	3	7	–
Transportation & Utilities	9	13	74	4	-4	–
Wholesale & Retail Trade	16	9	70	5	7	–



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.

# Manpower Employment Outlook Survey United States

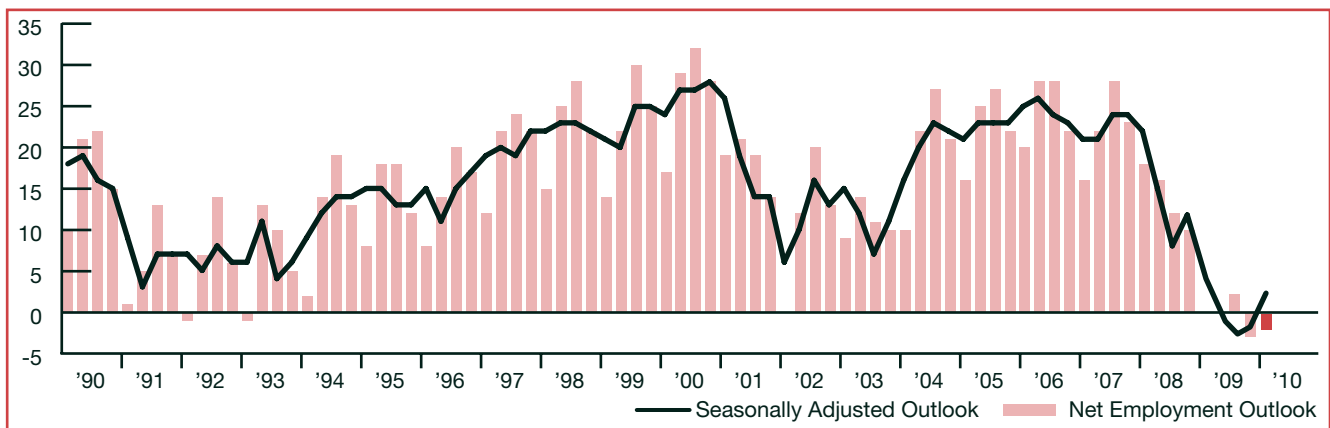
## West -2 (2)%

Among employers surveyed in the West, 11% plan to add staff, while 13% anticipate a decline in payrolls for the first three months of the new year resulting in a Net Employment Outlook of -2% for Quarter 1 2010. According to seasonally adjusted survey results, employers in the West anticipate a slight increase in hiring compared to Quarter 4 2009 and a slight decrease in hiring compared to one year ago. Employers in the West have the weakest Outlook among the U.S. regions surveyed.

Among the 12 industry sectors surveyed in the West, Durable Goods Manufacturing and Government

employers are expecting the strongest quarter-over-quarter change, with a moderate increase in hiring intentions. Compared to three months ago, slight job growth is anticipated by employers in half of the region's surveyed industry sectors: Construction, Transportation & Utilities, Information, Financial Activities, Leisure & Hospitality and Other Services. Employers in the Nondurable Goods Manufacturing, Professional & Business Services and Education & Health Services sectors anticipate relatively stable hiring trends. Wholesale and Retail Trade employers forecast a moderate decrease in payroll levels for Quarter 1 2010.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – West</b>	<b>11</b>	<b>13</b>	<b>71</b>	<b>5</b>	<b>-2</b>	<b>2</b>
Construction	11	23	60	6	-12	–
Education & Health Services	9	8	79	4	1	–
Financial Activities	10	9	79	2	1	–
Government	10	16	69	5	-6	–
Information	11	8	75	6	3	–
Leisure & Hospitality	15	14	70	1	1	–
Manufacturing – Durable Goods	11	14	72	3	-3	–
Manufacturing – Nondurable Goods	9	11	76	4	-2	–
Other Services	9	11	77	3	-2	–
Professional & Business Services	16	12	67	5	4	–
Transportation & Utilities	10	19	67	4	-9	–
Wholesale & Retail Trade	14	13	70	3	1	–



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 71,000 employers have been interviewed across 35 countries and territories to measure anticipated employment trends\* between January and March 2010.

All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of March 2010 as compared to the current quarter?”

Hiring activity is expected to be mostly positive throughout the Asia Pacific and Americas, but employer forecasts in the Europe, Middle East & Africa (EMEA) region are mixed. Employers in 25 of the 35 countries and territories Manpower surveys expect to add to their workforces in Quarter 1 2010. In quarter-over-quarter comparisons, Outlooks improve in 25 of 35 countries and territories. Hiring expectations are also stronger in 19 of 33 countries and territories where year-over-year comparisons can be made.

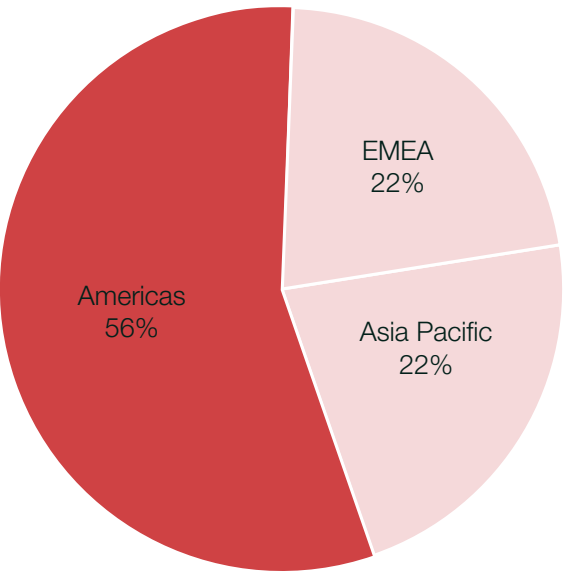
Employment forecasts are most favorable in India, Brazil, Singapore, Taiwan, Costa Rica, Australia and

Peru. Conversely, employer hiring expectations are weakest in Ireland, Romania and Spain.

Regionally, employers across the Americas report positive Net Employment Outlooks, with only employers in Colombia reporting a weaker forecast compared to Quarter 4 2009. Employers in Brazil, Costa Rica and Peru report the strongest hiring plans in the region. Job prospects in the U.S. and Mexico are the weakest in the region, however employer hiring sentiment is stronger than three months ago in both countries. Labor market strength in Asia Pacific is expected to be similar to that seen prior to the global downturn, with employers in India reporting the most optimistic hiring plans globally. In the EMEA region, hiring sentiments are mixed with employers in nine countries indicating modest improvements from three months ago.

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

## Survey Respondents by Region



Research for the Quarter 1 2010 Manpower Employment Outlook Survey involved surveying nearly 71,000 human resource directors and senior hiring managers from public and private organizations worldwide. 56% of the respondents came from nine countries in the Americas; 22% from eight countries and territories across Asia Pacific; and 22% from 18 countries in EMEA.

Full survey results for each of the 35 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 nearly 71,000 public and private employers across 35 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 2010 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 35 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.

## 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 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.

### 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 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 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.

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. Founded in 1948, the \$22 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 4,100 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 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 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, recruitment process outsourcing needs, and other innovative solutions, through Manpower Business Solutions. Under the Manpower Professional brand, the company places superior talent in areas such as information technology, scientific, engineering and finance verticals. More information on Manpower is available at [www.us.manpower.com](http://www.us.manpower.com).

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