

**ManpowerGroup  
Employment  
Outlook Survey  
United States**

**Q1  
2018**



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), the District of Columbia and Puerto Rico, to measure hiring intentions between January and March 2018. 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 2018 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 1 2018</b>	<b>21</b>	<b>5</b>	<b>71</b>	<b>3</b>	<b>16</b>	<b>19</b>
Quarter 4 2017	21	6	71	2	15	17
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



In the January-March 2018 period, 21 percent of U.S. employers expect to add to payrolls, while 5 percent anticipate a decrease in staffing levels. A further 71 percent of employers expect no change in workforce size.

Once the data is adjusted to allow for seasonal variation, the Net Employment Outlook for the U.S. is +19%—the strongest reported in the past decade. Nationwide, hiring prospects are 2 percentage points stronger when compared with the final quarter of 2017, and employers report an increase of 3 percentage points in comparison with this time one year ago.

Employers in two of the four U.S. regions report stronger Net Employment Outlooks when compared with figures for the previous quarter. In the Midwest, employers report an improvement of 4 percentage points, and employers in the West report an increase of 1 percentage point. The Outlook for the South is

unchanged, while employers in the Northeast report a slight decrease of 1 percentage point. Midwest employers anticipate the strongest labor market in 17 years, reporting an Outlook of +20% for the coming quarter. In the West, employers report an upbeat Outlook of +19%, and Outlooks for the South and the Northeast stand at +18% and +17%, respectively.

Compared with the final quarter of 2017, Midwest employers report slightly stronger hiring prospects. Hiring plans remain relatively stable in the Northeast and the West, and the Outlook for the South is unchanged. In comparison with this time one year ago, the Midwest Outlook is moderately stronger and employers in the South report a slight improvement. In the West, employers report relatively stable hiring intentions and the Outlook for the Northeast is unchanged.

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 expect to add to payrolls in all 13 industry sectors during the first quarter of 2018: Leisure & Hospitality (+28%), Transportation & Utilities (+26%), Professional & Business Services (+23%), Wholesale & Retail Trade (+23%), Durable Goods Manufacturing (+19%), Construction (+18%), Education & Health Services (+14%), Financial Activities (+14%), Information (+14%), Mining (+14%), Government (+13%), Nondurable Goods Manufacturing (+13%), Other Services (+13%).

Hiring intentions in the Transportation & Utilities sector nationwide are the strongest reported since the first quarter of 1982 when the survey started reporting seasonally adjusted figures. At the national level, employers in the Construction and the Durable Goods Manufacturing sectors report the strongest Outlooks for more than a decade. Employers in the Professional & Business Services sector report the strongest national Outlook since the sector was first analyzed nine years ago.

When compared with the final quarter of 2017, Transportation & Utilities sector employers nationwide report moderately stronger hiring intentions. A slight improvement in hiring prospects is reported for two industry sectors at the national level: Construction and Wholesale & Retail Trade.

Hiring plans remain relatively stable in all the remaining national industry sectors when compared with the previous quarter: Education & Health Services, Financial Activities, Government, Information, Leisure & Hospitality, Durable Goods Manufacturing, Nondurable Goods Manufacturing, Mining, Other Services 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 2018 %	Seasonally Adjusted %
Construction	17	7	72	4	10	18
Education & Health Services	15	3	78	4	12	14
Financial Activities	16	3	78	3	13	14
Government	16	4	75	5	12	13
Information	18	3	77	2	15	14
Leisure & Hospitality	31	7	59	3	24	28
Manufacturing – Durable Goods	21	5	72	2	16	19
Manufacturing – Nondurable Goods	15	5	78	2	10	13
Mining	15	6	75	4	9	14
Other Services	16	4	78	2	12	13
Professional & Business Services	25	5	68	2	20	23
Transportation & Utilities	27	4	66	3	23	26
Wholesale & Retail Trade	27	5	65	3	22	23

# Regional Comparisons

**+16 (+20)%**

## Midwest

In the Midwest, 21 percent of businesses surveyed anticipate an increase in staffing levels in the January-March time frame, while 5 percent expect payrolls to decline, resulting in a Net Employment Outlook of +16%. Once the data is adjusted to allow for seasonal variation, the Outlook for the region is the strongest reported in 17 years. Hiring prospects are slightly stronger when compared with the previous quarter, and improve moderately compared with this time one year ago.

When compared with the final quarter of 2017, Midwest employers report stronger hiring prospects for 10 of the 12 regional industry sectors. Construction sector employers in the region report considerably stronger hiring plans. Moderately stronger Outlooks are reported in five industry sectors: Government, Information, Other Services, Transportation & Utilities and Wholesale & Retail Trade. Hiring prospects are slightly stronger in three sectors: Education & Health Services, Leisure & Hospitality and Durable Goods Manufacturing.

Employers in three Midwest industry sectors report relatively stable hiring intentions when compared with the previous quarter: Financial Activities, Nondurable Goods Manufacturing and Professional & Business Services.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q1 2018	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Midwest</b>	<b>21</b>	<b>5</b>	<b>72</b>	<b>2</b>	<b>16</b>	<b>20</b>
Construction	14	5	78	3	9	21
Education & Health Services	13	1	80	6	12	13
Financial Activities	11	4	82	3	7	9
Government	11	4	79	6	7	8
Information	19	4	76	1	15	14
Leisure & Hospitality	31	7	60	2	24	31
Manufacturing – Durable Goods	22	6	69	3	16	21
Manufacturing – Nondurable Goods	17	3	79	1	14	18
Other Services	18	3	78	1	15	16
Professional & Business Services	24	7	67	2	17	23
Transportation & Utilities	28	5	64	3	23	25
Wholesale & Retail Trade	28	5	63	4	23	26

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

**+14 (+17)%**

## Northeast

Workforce gains are anticipated by 20 percent of businesses surveyed in the Northeast during the next three months. With 6 percent of employers expecting payrolls to decline, the resulting Net Employment Outlook is +14%. Once the data is adjusted to allow for seasonal variation, Northeast employers report relatively stable hiring prospects when compared with the final quarter of 2017, and no change when compared with this time one year ago.

Employer hiring plans strengthen slightly in three of the 12 Northeast industry sectors when compared with Quarter 4 2017: Durable Goods Manufacturing, Transportation & Utilities and Wholesale & Retail Trade.

Relatively stable hiring intentions are reported for four Northeast industry sectors in comparison with the previous quarter: Construction, Education & Health Services, Financial Activities and Government.

Compared to the final quarter of 2017, Northeast job seekers can expect moderately weaker hiring opportunities in two industry sectors: Other Services and Professional & Business Services. Outlooks also decline slightly in three Northeast sectors: Information, Leisure & Hospitality and Nondurable Goods Manufacturing.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q1 2018	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Northeast</b>	<b>20</b>	<b>6</b>	<b>71</b>	<b>3</b>	<b>14</b>	<b>17</b>
Construction	14	14	68	4	0	11
Education & Health Services	18	3	77	2	15	15
Financial Activities	18	3	78	1	15	16
Government	16	5	74	5	11	11
Information	10	5	83	2	5	5
Leisure & Hospitality	28	11	58	3	17	26
Manufacturing – Durable Goods	20	6	71	3	14	19
Manufacturing – Nondurable Goods	11	6	82	1	5	9
Other Services	12	5	80	3	7	7
Professional & Business Services	24	5	65	6	19	21
Transportation & Utilities	21	5	70	4	16	16
Wholesale & Retail Trade	27	6	65	2	21	23

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

**+17 (+18)%**

## South

In Quarter 1 2018 staffing levels are expected to increase in 22 percent of the businesses surveyed in the South, while 5 percent of employers anticipate a decline in payrolls. The resulting Net Employment Outlook for the region is +17%. Once the data is adjusted to allow for seasonal variation, hiring plans for the South are unchanged when compared with the final quarter of 2017. Compared with this time 12 months ago, the Outlook is slightly stronger.

When compared with the previous quarter, employers in four of the South's 12 industry sectors report a slight improvement in hiring prospects: Financial Activities, Other Services, Professional & Business Services and Wholesale & Retail Trade.

Hiring plans remain relatively stable in five industry sectors across the region as a whole: Education & Health Services, Government, Leisure & Hospitality, Durable Goods Manufacturing and Transportation & Utilities.

Job seekers in three region-wide industry sectors can expect slightly weaker hiring activity during the coming quarter when compared with the final quarter of 2017: Construction, Information and Nondurable Goods Manufacturing.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q1 2018	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – South</b>	<b>22</b>	<b>5</b>	<b>70</b>	<b>3</b>	<b>17</b>	<b>18</b>
Construction	19	6	72	3	13	17
Education & Health Services	16	3	78	3	13	14
Financial Activities	15	3	79	3	12	15
Government	17	3	77	3	14	14
Information	18	2	78	2	16	16
Leisure & Hospitality	35	6	56	3	29	30
Manufacturing – Durable Goods	18	4	75	3	14	18
Manufacturing – Nondurable Goods	14	6	77	3	8	9
Other Services	16	3	78	3	13	14
Professional & Business Services	26	6	66	2	20	22
Transportation & Utilities	24	4	71	1	20	24
Wholesale & Retail Trade	27	5	66	2	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.

**+17 (+19)%**

## West

In the West, 22 percent of businesses surveyed expect an increase in staffing levels during the January-March period, while 5 percent anticipate a decline, resulting in a Net Employment Outlook of +17%. Once the data is adjusted to allow for seasonal variation, hiring prospects for the region remain relatively stable when compared with both Quarter 4 2017 and Quarter 1 2017.

Transportation & Utilities employers in the West report a sharp improvement in the hiring climate when compared with the previous quarter. Slightly stronger hiring prospects are also reported in four of the West's 12 industry sectors: Construction, Financial Activities, Nondurable Goods Manufacturing and Wholesale & Retail Trade.

Employers report relatively stable hiring plans in five industry sectors across the region when compared with the final quarter of 2017: Education & Health Services, Government, Information, Durable Goods Manufacturing and Professional & Business Services.

A slightly weaker hiring pace is anticipated by employers in two of the West's industry sectors in a quarter-over-quarter comparison: Leisure & Hospitality and Other Services.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q1 2018	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – West</b>	<b>22</b>	<b>5</b>	<b>70</b>	<b>3</b>	<b>17</b>	<b>19</b>
Construction	19	7	72	2	12	21
Education & Health Services	15	2	78	5	13	15
Financial Activities	22	1	75	2	21	20
Government	20	6	68	6	14	16
Information	22	4	72	2	18	16
Leisure & Hospitality	26	7	63	4	19	22
Manufacturing – Durable Goods	23	5	69	3	18	18
Manufacturing – Nondurable Goods	19	4	73	4	15	17
Other Services	15	6	77	2	9	10
Professional & Business Services	23	3	72	2	20	22
Transportation & Utilities	38	4	56	2	34	40
Wholesale & Retail Trade	28	4	65	3	24	25

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 2018, 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 Q1 2018	Metropolitan Statistical Areas
31%	Cape Coral
29%	Ogden
28%	Chattanooga
27%	Los Angeles, Phoenix
26%	Charlotte
25%	Des Moines
24%	Atlanta, Bakersfield, Deltona, Orlando, Sacramento, San Antonio, San Jose
23%	Fresno, Milwaukee, Philadelphia, Tampa
22%	Boston, Charleston, Honolulu, Lakeland, San Diego
21%	Augusta, Austin, Columbia, Denver, Grand Rapids, Madison, Nashville, Omaha, San Francisco
20%	Albuquerque, Salt Lake City, Winston-Salem
19%	Allentown, Cincinnati, Columbus, Detroit, Harrisburg, Jacksonville, Memphis, North Port, Riverside
18%	Buffalo, Dallas, Louisville, Scranton, Stockton, Virginia Beach
17%	Baton Rouge, Bridgeport, Houston, Knoxville, Las Vegas, Minneapolis, Palm Bay, Springfield, Wichita
16%	Boise City, Little Rock, McAllen, Provo, Raleigh
15%	Chicago, Colorado Springs, Greensboro, Hartford, Jackson, Pittsburgh, Syracuse
14%	Greenville, Kansas City, New Orleans, Richmond, Tucson
13%	Indianapolis, Oklahoma City, St. Louis
12%	Birmingham, Dayton, El Paso, Miami, New York, Washington
11%	Rochester, Toledo, Youngstown
10%	Akron, Baltimore, Oxnard, Seattle, Worcester
8%	Tulsa
7%	Cleveland, Portland
5%	Albany, New Haven
4%	Spokane
3%	Providence

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 nearly 59,000 employers across 43 countries and territories to forecast labor market activity\* in Quarter 1 2018. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of March 2018 as compared to the current quarter?”

According to the survey, workforce gains of varying margins are forecast by employers in 41 of 43 countries and territories during the January-March time frame. And for the second consecutive quarter since the global financial crisis in 2009, employers report no negative Outlooks among the 43 countries and territories. Additionally, employers in a number of countries, including Australia, Japan, Norway, Poland, Romania and the United States, report their strongest hiring plans in five years or more. There are also signs that the volatility recently observed in some countries—most notably in Brazil, China and India—is declining.

Overall, forecasts improve or remain stable in most countries and territories. When compared with the final quarter of 2017, hiring prospects improve in 20 of 43 countries and territories, are unchanged in eight, and decline in 15. When compared with this time one year ago, hiring intentions improve in 26 of the 43 countries and territories, are unchanged in six, and weaken in only 11.

Workforce gains are forecast in 23 of 25 countries in the Europe, Middle East & Africa (EMEA) region through the first three months of 2018. Hiring plans improve in 10 countries quarter-over-quarter, weaken in 10, and are unchanged in five. In a year-over-year comparison Outlooks improve in 14 countries, decline in eight and are unchanged in three. Job seekers in Romania and Slovenia may benefit from the strongest EMEA region first-quarter hiring plans, while the weakest forecasts are reported in Austria and Italy, with employers in both countries predicting a flat hiring pace through the first three months of the year.

Payrolls are expected to increase in all eight Asia Pacific countries and territories, and Outlooks are trending generally stronger. The forecast improves by varying margins in five countries and territories in comparison to the fourth-quarter results, weakens in only two and is unchanged in one. In a year-over-year comparison hiring plans strengthen in six and are unchanged in the remaining two. Employers in Taiwan report the most optimistic forecast in the region, as well as across the globe. The region’s weakest forecasts are reported by employers in China and Singapore.

Positive Outlooks are reported in all 10 countries surveyed in the Americas. Hiring confidence strengthens in five countries, dips in three and is unchanged in two when compared to the last three months of 2017. In the year-over-year comparison hiring activity is expected to pick up in six countries, decline in three and remain unchanged in one. Employers in the United States and Costa Rica report the strongest first-quarter hiring plans while those in Brazil and Panama report the weakest.

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 13 March 2018 and will detail expected labor market activity for the second 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 1 2018 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 2018 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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