

**ManpowerGroup  
Employment  
Outlook Survey  
United States**

**Q3  
2019**



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 July and September 2019. 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 September 2019 compared to the current quarter?”

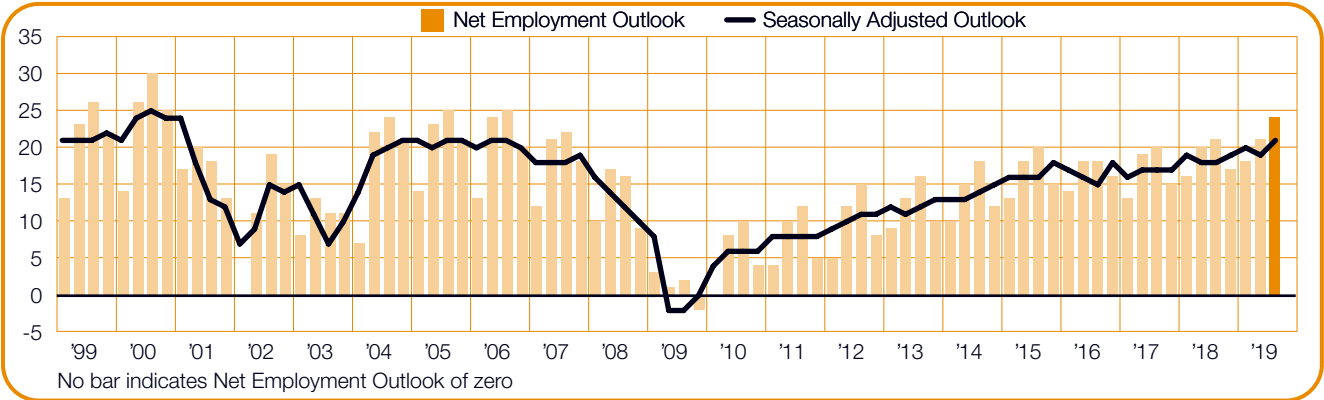
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# United States Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Quarter 3 2019</b>	<b>27</b>	<b>3</b>	<b>69</b>	<b>1</b>	<b>24</b>	<b>21</b>
Quarter 2 2019	24	3	72	1	21	19
Quarter 1 2019	23	5	71	1	18	20
Quarter 4 2018	22	5	71	2	17	19
Quarter 3 2018	24	3	71	2	21	18



In the third quarter of 2019, 27 percent of U.S. employers expect to increase payrolls, 3 percent anticipate a decrease and 69 percent expect no change.

Once the data is adjusted to allow for seasonal variation, the national Net Employment Outlook for the U.S. stands at +21%, the strongest reported in 13 years. Hiring intentions are 2 percentage points stronger when compared with the previous quarter, and improve by 3 percentage points in comparison with this time one year ago.

Employers in the Midwest report the strongest hiring prospects in 18 years, with an Outlook improving by 2 percentage points in comparison with Quarter 2 2019. West employers also report a quarter-over-quarter increase of 2 percentage points, resulting in the strongest Outlook since 2008. In the Northeast, hiring plans are 1 percentage point stronger when compared with the previous quarter and the Outlook reported in

the South is unchanged. The strongest regional hiring pace is expected in the West, where the Outlook is +22%. Midwest employers report an Outlook of +21%, and Outlooks stand at +20% and +19% in the South and the Northeast, respectively.

In a comparison with the second quarter of 2019, hiring prospects are slightly stronger in the West and the Midwest. Northeast employers report relatively stable hiring plans, and the Outlook for the South is unchanged. When compared with this time one year ago, employers in the West report moderately stronger hiring intentions. Slight year-over-year improvements are reported in the Midwest and the Northeast, while employers in the South report relatively stable hiring plans.

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 workforce gains during the third quarter of 2019: Professional & Business Services (+28%), Leisure & Hospitality (+27%), Transportation & Utilities (+25%), Wholesale & Retail Trade (+24%), Construction (+21%), Government (+20%), Mining (+19%), Durable Goods Manufacturing (+18%), Financial Activities (+17%), Education & Health Services (+16%), Nondurable Goods Manufacturing (+16%), Other Services (+16%), Information (+14%).

In a comparison with the previous quarter, employers expect moderately stronger hiring activity in two U.S. industry sectors, Government and Professional & Business Services. In both sectors, Outlooks for Quarter 3 2019 are the strongest since they were first analyzed separately more than 10 years ago.

Hiring plans are slightly stronger in five nationwide industry sectors when compared with the second quarter of 2019. Other Services sector employers nationally expect the strongest labor market since the sector was first analyzed separately in 2009. Hiring intentions also improve slightly in the Construction, Education & Health Services, Information and Leisure & Hospitality sectors.

In six national industry sectors, hiring prospects remain relatively stable when compared with the previous quarter: Financial Activities, Durable Goods Manufacturing, Nondurable Goods Manufacturing, Mining, Transportation & Utilities and Wholesale & Retail Trade.

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 Q3 2019 %	Seasonally Adjusted %
Construction	30	2	66	2	28	21
Education & Health Services	20	4	75	1	16	16
Financial Activities	20	2	78	0	18	17
Government	24	2	72	2	22	20
Information	18	3	77	2	15	14
Leisure & Hospitality	39	6	53	2	33	27
Manufacturing – Durable Goods	25	4	71	0	21	18
Manufacturing – Nondurable Goods	21	4	73	2	17	16
Mining	24	2	70	4	22	19
Other Services	20	2	77	1	18	16
Professional & Business Services	33	3	63	1	30	28
Transportation & Utilities	31	3	65	1	28	25
Wholesale & Retail Trade	29	4	66	1	25	24

# Regional Comparisons

**+25 (+21)%**

## Midwest

Employers in 28 percent of Midwest businesses surveyed expect to grow payrolls during the forthcoming quarter. With 3 percent of employers expecting to trim staffing levels, and 68 percent anticipating no change, the resulting Net Employment Outlook stands at +25%. Once the data is adjusted to allow for seasonal variation, the Outlook is the strongest in the Midwest for 18 years, improving slightly in comparison with both the previous quarter and this time one year ago.

Leisure & Hospitality sector employers in the Midwest report considerably stronger hiring intentions for the next three months when compared with Quarter 2 2019. Employers in three Midwest industry sectors anticipate moderately stronger hiring activity in comparison with the second quarter of 2019: Construction, Government and Information. Slightly stronger hiring prospects are reported in three sectors: Education & Health Services, Other Services and Transportation & Utilities.

Job seekers in three Midwest industry sectors can expect relatively stable hiring activity when compared with the previous quarter: Durable Goods Manufacturing, Professional & Business Services and Wholesale & Retail Trade.

Nondurable Goods Manufacturing sector employers in the Midwest expect a moderately weaker labor market in the upcoming quarter when compared with the second quarter of 2019, while employers in the Financial Activities sector anticipate a slightly weaker hiring pace.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q3 2019	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Midwest</b>	<b>28</b>	<b>3</b>	<b>68</b>	<b>1</b>	<b>25</b>	<b>21</b>
Construction	37	1	62	0	36	27
Education & Health Services	17	1	81	1	16	15
Financial Activities	23	4	71	2	19	17
Government	22	2	76	0	20	17
Information	12	4	82	2	8	8
Leisure & Hospitality	45	3	49	3	42	34
Manufacturing – Durable Goods	27	3	69	1	24	21
Manufacturing – Nondurable Goods	24	4	71	1	20	17
Other Services	21	3	75	1	18	17
Professional & Business Services	37	3	60	0	34	30
Transportation & Utilities	31	4	63	2	27	22
Wholesale & Retail Trade	31	4	64	1	27	24

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

**+22 (+19)%**

## Northeast

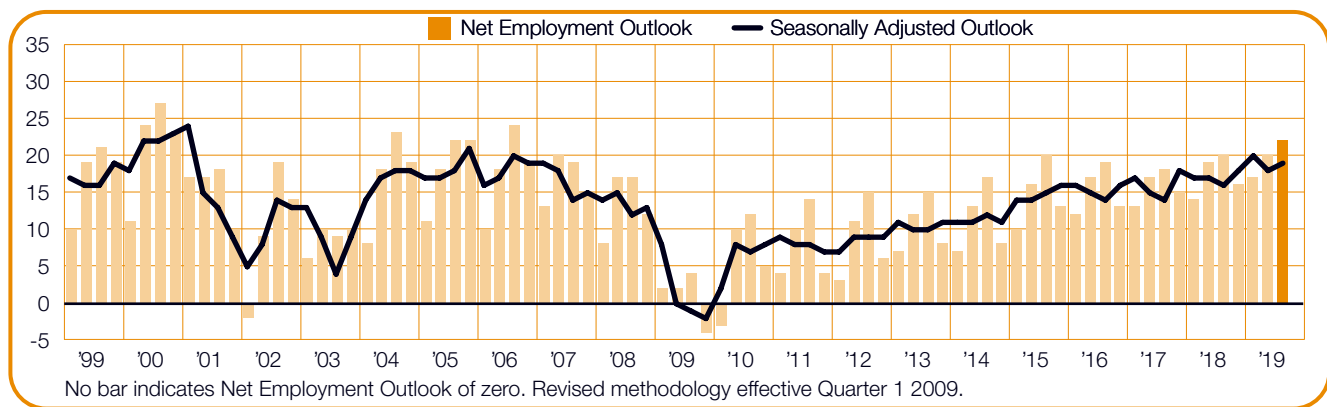
In the Northeast, employers in 26 percent of businesses surveyed expect to add to payrolls during the third quarter of 2019, while 4 percent anticipate a decline and 69 percent expect no change. The resulting Net Employment Outlook stands at +22%. Once the data is adjusted to allow for seasonal variation, hiring plans remain relatively stable when compared with the previous quarter and improve by 3 percentage points in comparison with Quarter 3 2018.

Moderately stronger hiring activity is anticipated in two of the Northeast's industry sectors during the next three months, when compared with the second quarter of 2019: Information and Professional & Business Services.

Employers in three Northeast industry sectors expect slightly stronger labor markets when compared with the previous quarter: Education & Health Services, Government and Transportation & Utilities.

Northeast employers in five industry sectors report relatively stable hiring plans quarter-over-quarter: Construction, Financial Activities, Nondurable Goods Manufacturing, Other Services and Wholesale & Retail Trade.

Job seekers in the Northwest's Leisure & Hospitality and Durable Goods Manufacturing sectors can expect a slightly weaker hiring pace when compared with the previous quarter, according to employers.



Industry	Increase %	Decrease %	No Change %	Don't Know %	Net Employment Outlook Q3 2019 %	Seasonally Adjusted %
<b>All Industries – Northeast</b>	<b>26</b>	<b>4</b>	<b>69</b>	<b>1</b>	<b>22</b>	<b>19</b>
Construction	32	2	64	2	30	18
Education & Health Services	18	4	76	2	14	17
Financial Activities	21	2	77	0	19	18
Government	22	2	73	3	20	19
Information	14	4	81	1	10	10
Leisure & Hospitality	37	4	58	1	33	22
Manufacturing – Durable Goods	23	4	73	0	19	15
Manufacturing – Nondurable Goods	24	5	70	1	19	17
Other Services	14	4	81	1	10	9
Professional & Business Services	32	2	65	1	30	27
Transportation & Utilities	31	3	65	1	28	25
Wholesale & Retail Trade	32	5	61	2	27	25

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

**+22 (+20)%**

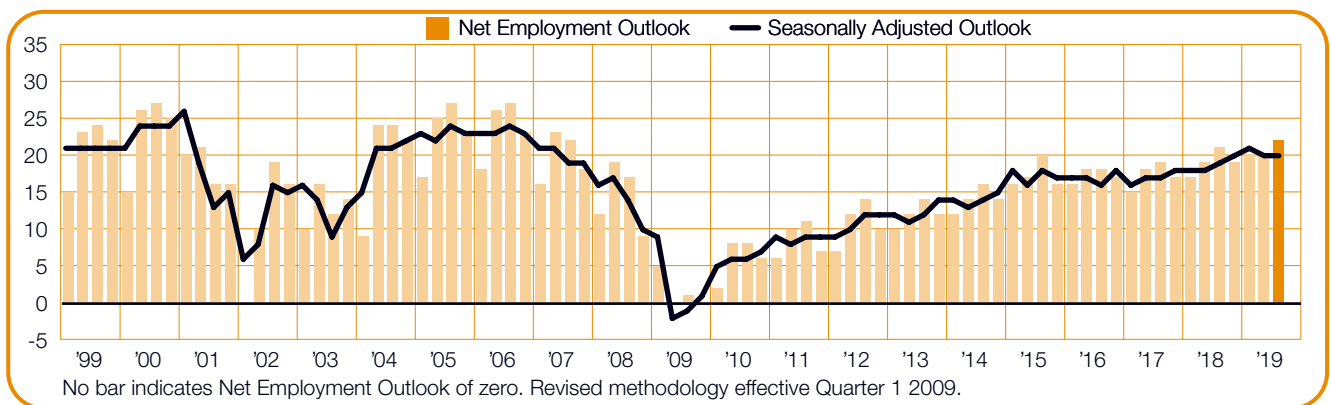
## South

In 26 percent of businesses surveyed in the South, employers expect to add to staffing levels during the July-September period. With 4 percent of employers expecting to trim payrolls and 69 percent expecting no change, the Net Employment Outlook stands at +22%. Once the data is adjusted to allow for seasonal variation, hiring plans are unchanged when compared with the previous quarter, and remain relatively stable in comparison with this quarter last year.

Hiring intentions are moderately stronger for two industry sectors in the South when compared with the previous quarter: Government and Other Services. Slightly stronger hiring plans are reported in four of the South's industry sectors: Construction, Education & Health Services, Financial Activities and Professional & Business Services.

In four industry sectors across the South, employers report relatively stable hiring prospects quarter-over-quarter: Information, Durable Goods Manufacturing, Nondurable Goods Manufacturing and Wholesale & Retail.

Transportation & Utilities employers in the South expect a moderately weaker hiring pace in the coming quarter when compared with Quarter 2 2019, while the Outlook for the Leisure & Hospitality sector in the region is slightly weaker.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q3 2019	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – South</b>	<b>26</b>	<b>4</b>	<b>69</b>	<b>1</b>	<b>22</b>	<b>20</b>
Construction	27	3	68	2	24	21
Education & Health Services	23	3	73	1	20	17
Financial Activities	19	1	80	0	18	17
Government	25	2	71	2	23	22
Information	20	3	75	2	17	16
Leisure & Hospitality	38	8	52	2	30	28
Manufacturing – Durable Goods	23	4	72	1	19	17
Manufacturing – Nondurable Goods	18	4	75	3	14	14
Other Services	21	1	77	1	20	18
Professional & Business Services	31	4	64	1	27	25
Transportation & Utilities	27	2	68	3	25	25
Wholesale & Retail Trade	27	3	69	1	24	23

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.

**+25 (+22)%**

## West

Employers in 28 percent of businesses surveyed in the West expect workforce gains during the coming quarter, while 3 percent anticipate a decrease and 68 percent expect no change. The resulting Net Employment Outlook stands at +25%. Once the data is adjusted to allow for seasonal variation, hiring plans for the region are the strongest reported in more than 11 years. Employers report a slight quarter-over-quarter improvement in the Outlook, and a moderate increase when compared with this time one year ago.

In three of the West's industry sectors, employers report moderately stronger hiring intentions for Quarter 3 2019 when compared with the previous quarter: Information, Professional & Business Services and Transportation & Utilities. Slightly stronger hiring prospects are reported in four of the region's industry sectors: Financial Activities, Government, Leisure & Hospitality and Nondurable Goods Manufacturing.

Education & Health Services sector employers in the West report a relatively stable labor market in a comparison with the second quarter of 2019.

During the next three months, job seekers in the West's Durable Goods Manufacturing and Other Services sectors can expect moderately weaker hiring activity when compared with the previous quarter, according to employers. Employers in the region's Construction and Wholesale & Retail Trade sectors report slightly weaker hiring plans.



Industry	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q3 2019	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – West</b>	<b>28</b>	<b>3</b>	<b>68</b>	<b>1</b>	<b>25</b>	<b>22</b>
Construction	31	2	66	1	29	21
Education & Health Services	20	5	74	1	15	16
Financial Activities	19	1	79	1	18	18
Government	26	3	69	2	23	20
Information	25	2	72	1	23	23
Leisure & Hospitality	38	5	56	1	33	26
Manufacturing – Durable Goods	29	4	67	0	25	21
Manufacturing – Nondurable Goods	22	4	74	0	18	16
Other Services	20	2	78	0	18	14
Professional & Business Services	34	3	62	1	31	29
Transportation & Utilities	35	2	62	1	33	29
Wholesale & Retail Trade	28	5	67	0	23	22

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 3 2019, 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 Q3 2019	Metropolitan Statistical Areas
37%	Charlotte
36%	Grand Rapids
34%	Madison
33%	Columbia, Milwaukee, San Jose
32%	Cincinnati, Seattle
31%	Albany, Albuquerque, Charleston, Indianapolis, Sacramento
30%	Colorado Springs, Provo-Orem
28%	Denver, Greensboro, Jacksonville, Memphis, Syracuse, Toledo
27%	Des Moines, Portland, Richmond, Winston-Salem
26%	Boston, Columbus, Omaha, Phoenix, Stockton, Washington
25%	Allentown, Boise City, Buffalo, Lakeland, Springfield, Virginia Beach
24%	Augusta, Baton Rouge, Dayton, El Paso, Minneapolis, Orlando, Raleigh, Rochester, Wichita
23%	Atlanta, Austin, New Haven, San Antonio, Spokane
22%	Deltona, Little Rock, New Orleans, Salt Lake City
21%	Cleveland, Harrisburg, McAllen, Nashville, San Francisco, St. Louis, Tucson
20%	Bakersfield, Chicago, Greenville, Hartford, Las Vegas, Los Angeles, Ogden, Palm Bay, Tulsa
19%	Akron, Baltimore, Fresno, Honolulu, Kansas City, Knoxville, North Port, Oklahoma City, Oxnard, Providence, Scranton
18%	Birmingham, Pittsburgh, Worcester
17%	Detroit, San Diego, Tampa
16%	Bridgeport, Miami
15%	Chattanooga, Dallas, Houston, Louisville, Riverside, Youngstown
13%	Jackson, Philadelphia
9%	Cape Coral
8%	New York

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 in 44 countries and territories to forecast labor market activity\* in the third quarter of 2019. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of September 2019 as compared to the current quarter?”

The ManpowerGroup research for the third quarter of 2019 reveals employers expect workforce gains in 43 of 44 countries and territories surveyed in the period up to the end of September.

When compared with the previous quarter, employers in 18 of 44 countries and territories report stronger hiring prospects, while employers in 18 report weaker hiring plans and no change is anticipated in eight. In a comparison with the same period last year, hiring intentions strengthen in 12 countries and territories, but weaken in 26 and are unchanged in six. The strongest hiring sentiment is reported in Japan, Croatia, Taiwan, the U.S., Greece and Slovenia, while the weakest hiring prospects are reported for Hungary, Argentina, Italy and Spain.

Payroll gains are anticipated by employers in 25 of 26 Europe, Middle East & Africa (EMEA) region countries surveyed during the next three months, while employers in Hungary expect to trim payrolls. When compared with the second quarter of 2019, hiring prospects improve in five countries but weaken in 14. In a comparison with the third quarter of 2018, Outlooks also strengthen in five countries, but decline in 17. The strongest hiring expectations for the coming quarter are reported in Croatia, Greece and Slovenia, while employers in Hungary, Italy and Spain report the weakest hiring plans.

Employers in all eight Asia Pacific countries and territories surveyed expect to grow payrolls in the three months to September 2019. In a comparison with the prior quarter, hiring intentions strengthen in five countries and territories, but weaken in two. When compared with this time one year ago employers report stronger Outlooks in two countries and territories, but hiring prospects decline in five. Employers in Japan and Taiwan anticipate the strongest hiring activity during the third quarter of 2019, while the weakest Outlooks are reported in China, New Zealand and Singapore.

Job seekers in all 10 Americas countries surveyed can expect hiring opportunities in the forthcoming quarter, according to employers. When compared with the previous quarter, hiring prospects improve in eight countries, but weaken in two. In a comparison with the same period last year, Outlooks improve in five countries but decline in four. U.S. and Canadian employers report the strongest hiring prospects for the coming quarter, while the weakest Outlooks are reported in Argentina and Panama.

Full survey results for each of the 44 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 10th September 2019 and will detail expected labor market activity for the final quarter of 2019.

\* Commentary is based on seasonally adjusted data where available. Data is not seasonally adjusted for Croatia or 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 55 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 44 countries and territories to measure anticipated employment trends each quarter. This sample allows for analysis to be performed across specific sectors and regions to provide more detailed information.

**Focused:** For more than five decades the survey has derived all of its information from a single question:

For the Quarter 3 2019 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 September 2019 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 +/- 4.0%.

## 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 Croatia and Portugal. ManpowerGroup intends to add seasonal adjustments to the data for other countries in the future, as more historical data is compiled. Note that in Quarter 2 2008, ManpowerGroup adopted the TRAMO-SEATS method of seasonal adjustment for data.

## Additional Information Available

Find complete survey results, including reports for the top 100 Metropolitan Statistical Areas, 50 states, District of Columbia and Puerto Rico on our website at [press.manpower.com](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 hundreds of thousands of organizations every year, providing them with skilled talent while finding meaningful, sustainable employment for millions of people 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 over 70 years. In 2019, ManpowerGroup was named one of the World's Most Ethical Companies for the tenth year and one of Fortune's Most Admired Companies for the seventeenth year, 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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