

Q2 2013 Overview

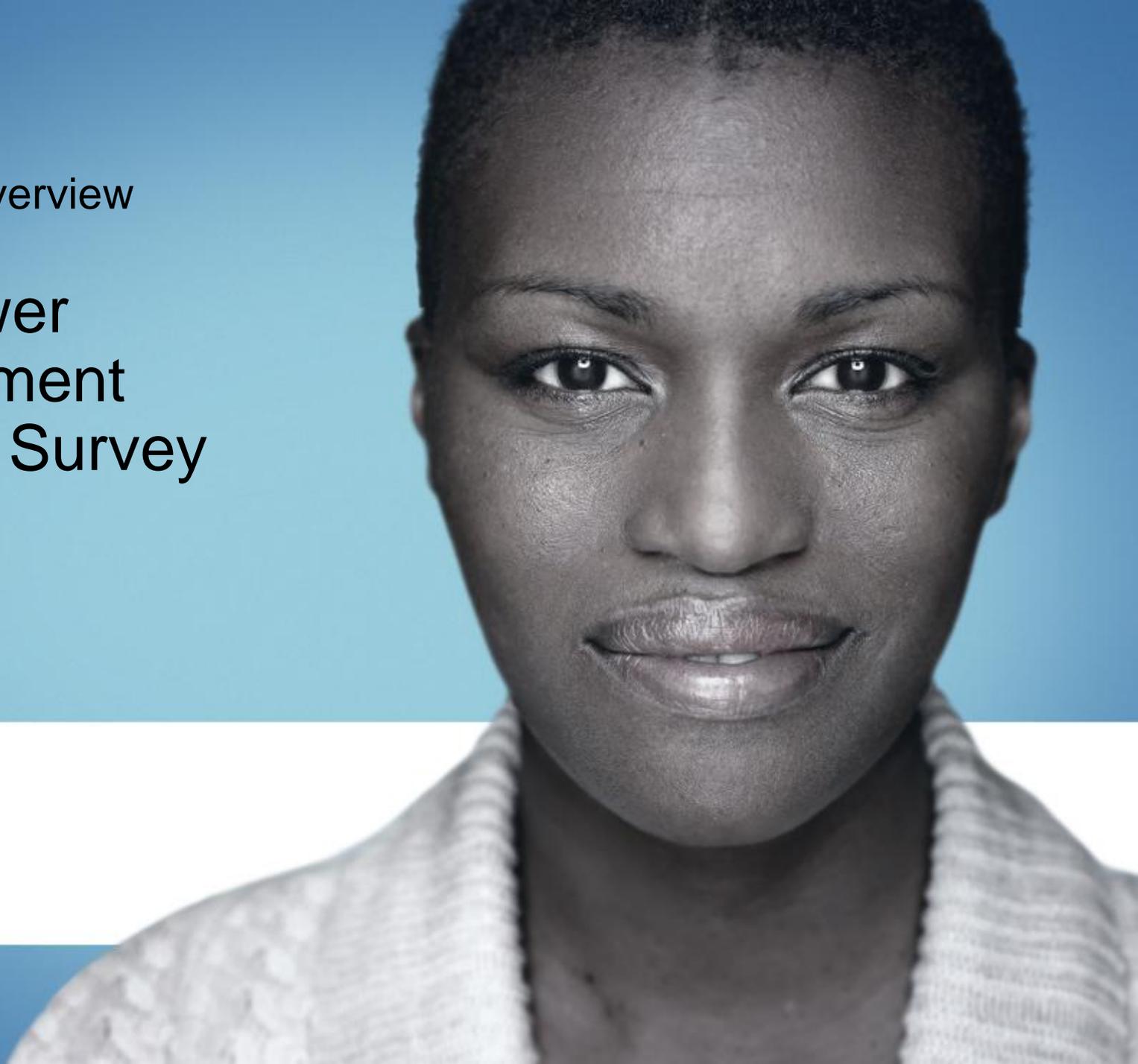
# Manpower Employment Outlook Survey

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ManpowerGroup™

ManpowerGroup™ is the world leader in innovative workforce solutions. We leverage our global reach and local expertise of tens of thousands of people across more than 80 countries, making it possible for businesses to access the talent they need when they need it.

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ManpowerGroup™  
Solutions

ManpowerGroup™ Solutions provides clients with human resources outsourcing services primarily in the areas of large-scale recruiting and outcome-based workforce-intensive initiatives, thereby sharing in the risk and reward with our clients.

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Experis™  
ManpowerGroup

Experis™ is the global leader in professional resourcing and project-based workforce solutions. With operations in more than 50 countries, we deliver 53 million hours of professional talent specializing in IT, Finance and Engineering to accelerate clients' businesses each year.

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Right  
Management®  
ManpowerGroup

Right Management® is the global leader in talent and career management workforce solutions. Through our innovative and proprietary process, we leverage our expertise to successfully increase productivity and optimize business performance.

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Manpower®

Manpower® is the global leader in contingent and permanent recruitment workforce solutions. We provide the personal flexibility and agility businesses need with a continuum of staffing solutions.

# Manpower Employment Outlook Survey

“How do you anticipate total employment at your location to change in the three months to the end of June 2013, as compared to the current quarter?”

- Quarterly measure of employers' intentions to increase or decrease the number of employees in their workplace during the upcoming quarter
- 18,000 U.S. employers surveyed; 66,000 globally
- Net Employment Outlook is the key statistic

# Seasonal Adjustment

- Seasonal adjustments have been applied to the global, U.S. national and U.S. regional survey data
- These adjustments make it possible to review the data without the employment fluctuations that occur annually
- The result is a clearer picture of the data over time

# Global Outlook



# Global Results

- Survey shows global economic challenges and uncertainty will continue to contribute to subdued hiring
  - Employers in 25 countries and territories report weaker hiring forecasts compared to this time last year
- Employment forecasts are most favorable in Brazil, India, Panama, Taiwan and Turkey
- Hiring expectations are weakest in Italy, Spain, Greece and the Netherlands
  - Results in Italy and Spain match the weakest employer forecasts ever reported there

# United States Outlook



# 18,000

U.S. EMPLOYERS SHARED THEIR HIRING PLANS FOR Q1 2013

18%

PLAN  
TO HIRE

5%

EXPECT TO  
LET STAFF GO

73%

PLAN TO KEEP  
WORKFORCE  
LEVELS STEADY

4%

ARE UNSURE  
ABOUT HIRING  
PLANS

Source: Manpower Employment Outlook Survey



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# U.S. Results

- Gradual acceleration in U.S. hiring continues
- Seasonally adjusted Net Employment Outlook +11%
  - One percentage point decrease from Q1 2013 (+12%)
  - Slightly improved compared to +10% in Q2 2012

# BEST AND WORST OUTLOOK FOR JOBS BY INDUSTRIES IN Q2 2013

Industry Forecast



## Sunny Outlook



Leisure & Hospitality



Professional & Business Services



Wholesale & Retail Trade



## Cloudy Outlook



Education & Health Services



Government



Other Services



Construction

Source: Manpower Employment Outlook Survey



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# Regional Results

- Hiring pace remains positive across the regions
- Quarter-over-quarter comparison shows stability in Northeast, Midwest and South, slight decline in West

	Q2 2013 (Current Quarter)	Q1 2013 (Previous Quarter)	Q2 2012 (One Year Ago)
Northeast	+10%	+11%	+9%
Midwest	+12%	+11%	+12%
South	+11%	+12%	+10%
West	+10%	+13%	+10%

(Seasonally adjusted)

## Local Outlook



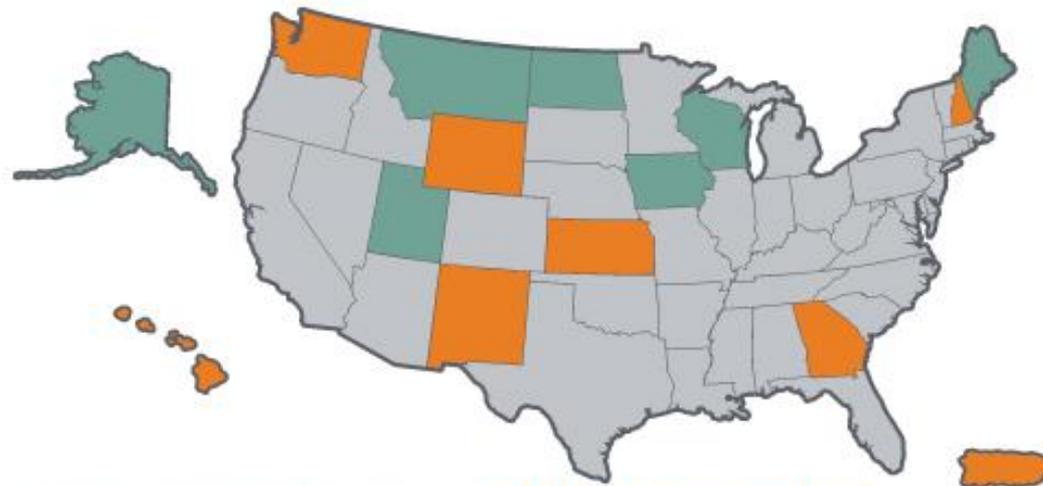
## BEST AND WORST OUTLOOK FOR JOBS BY METRO AREAS IN Q2 2013



Source: Manpower Employment Outlook Survey



## BEST AND WORST OUTLOOK FOR JOBS BY STATES IN Q2 2013



### ■ Best States for Jobs

North Dakota  
Maine  
Alaska  
Iowa  
Montana  
Utah  
Wisconsin

### ■ Worst States for Jobs

Puerto Rico  
Wyoming  
New Mexico  
Kansas  
Georgia  
New Hampshire

Source: Manpower Employment Outlook Survey



# Georgia

- 15% of employers expect to increase hiring
- 7% of employers plan to decrease
- 74% expect no change in their hiring plans
- 4% are undecided
- Net Employment Outlook = +8%

# Georgia Industry Sector Results

Job prospects appear best in:	Employers planning to reduce staff levels:	Employers who expect no change
<ul style="list-style-type: none"><li>• Construction</li><li>• Non Durable Goods Manufacturing</li><li>• Wholesale &amp; Retail Trade</li><li>• Financial Activities</li><li>• Transportation &amp; Utilities</li><li>• Education &amp; Health Services</li><li>• Leisure &amp; Hospitality</li><li>• Government</li></ul>	<ul style="list-style-type: none"><li>• Durable Goods Manufacturing</li><li>• Information</li><li>• Other Services</li></ul>	<ul style="list-style-type: none"><li>• Professional and Business Services</li></ul>

## Atlanta – Sandy Springs – Marietta MSA

- 16% of employers expect to increase hiring
- 8% of employers plan to decrease
- 71% expect no change in their hiring plans
- 5% are undecided
- Net Employment Outlook = +8%

# Atlanta – Sandy Springs – Marietta MSA Industry Sector Results

Job prospects appear best in:	Employers planning to reduce staff levels:	Employers planning no change to staff levels:
<ul style="list-style-type: none"><li>• Nondurable Goods Manufacturing</li><li>• Transportation &amp; Utilities</li><li>• Wholesale &amp; Retail Trade</li><li>• Financial Activities</li><li>• Leisure &amp; Hospitality</li></ul>	<ul style="list-style-type: none"><li>• Durable Goods Manufacturing</li><li>• Information</li><li>• Other Services</li><li>• Government</li></ul>	<ul style="list-style-type: none"><li>• Education &amp; Health Services</li><li>• Construction</li><li>• Professional &amp; Business Services</li></ul>

# Conclusion

- U.S. employers foresee continued stability in workforce levels
- Employers in the 100 MSAs surveyed, all 50 states, Puerto Rico and the District of Columbia report positive hiring plans
- More information available at: [press.manpower.com](http://press.manpower.com)
- Save the date: Quarter 3 2013 survey available June 11