

# UNITED STATES MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY

Net Positive Outlooks Optimistic  
Across Regions, YoY



# EXECUTIVE SUMMARY

**In the 60<sup>th</sup> anniversary edition of the ManpowerGroup Employment Outlook Survey of more than 39,000 employers, all countries and territories report a positive outlook for the first time since before the pandemic.**

**While outlooks improve year-over-year, hiring sentiment weakens compared with Q4 2021** in the U.S. Digital roles are most in demand: IT, Technology, Telecoms, Communications and Media reported the strongest outlook (+60%), followed by Banking, Finance, Insurance and Real Estate (+50%) and Construction (+41%). The weakest hiring intentions were found in Not-for-profit (+29%) and Other Industries (+27%).

Employers know flexibility is the key to attracting workers in a tight labor market: Organizations expect 51% of Finance and Accounting and 50% of the Administrative/Office support workforce to work a hybrid mix of onsite workplace and remote.

Not all roles can be hybrid: The Manufacturing and Production industries are most likely to be in the workplace all of the time (55%) whereas roles in IT and Telecoms are more likely to be full-time remote (21%).

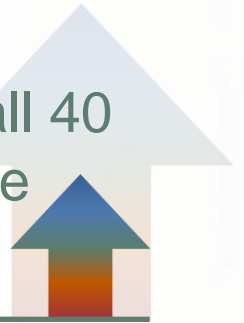
# Table of Contents

Q1 EMPLOYMENT OUTLOOKS .....	04
VACCINE EXPECTATIONS FOR ON-SITE RETURN .....	11
THE GREAT SHIFT TO HYBRID WORKING .....	15
ABOUT THE MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY .....	18



## Q1 EMPLOYMENT OUTLOOKS:

For the first time since before the pandemic, all 40 countries report positive employment outlooks



“This is the most optimistic Q1 report we have seen since the survey began six decades ago. Employers continue to bring workers back into the labor market and the reconciliation between what workers want and what employers need continues.”

— Becky Frankiewicz, President,  
ManpowerGroup North America.



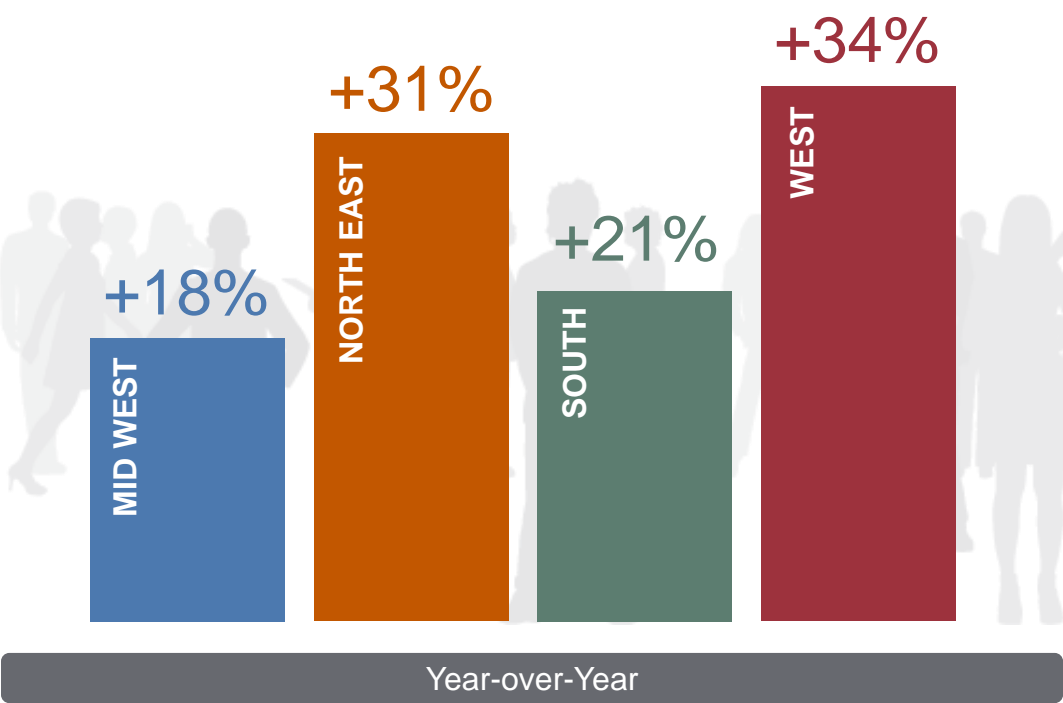
# Employer Hiring Expectations for January – March 2022

U.S. employers expect a robust labor market in the first quarter of 2022, reporting a seasonally adjusted, **Net Employment Outlook of +41%**. Hiring intentions strengthen year-over-year but decrease since Q4, +26 and -5 percentage points, respectively.

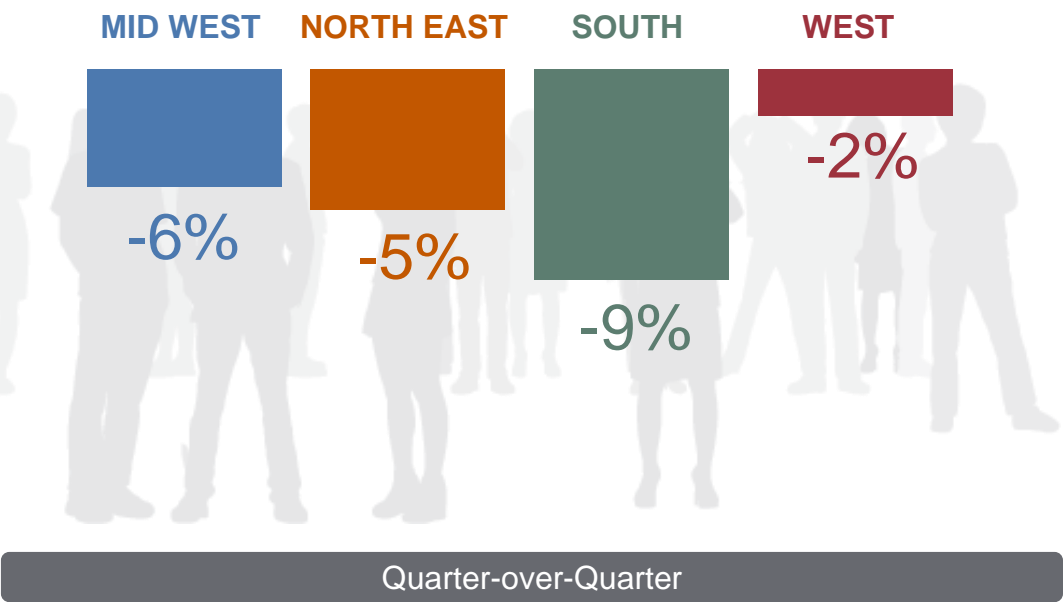


# Net Positive Outlooks Optimistic Across Regions YoY

**Year-over-year improvements** are reported in Mid West, North East, South and West.

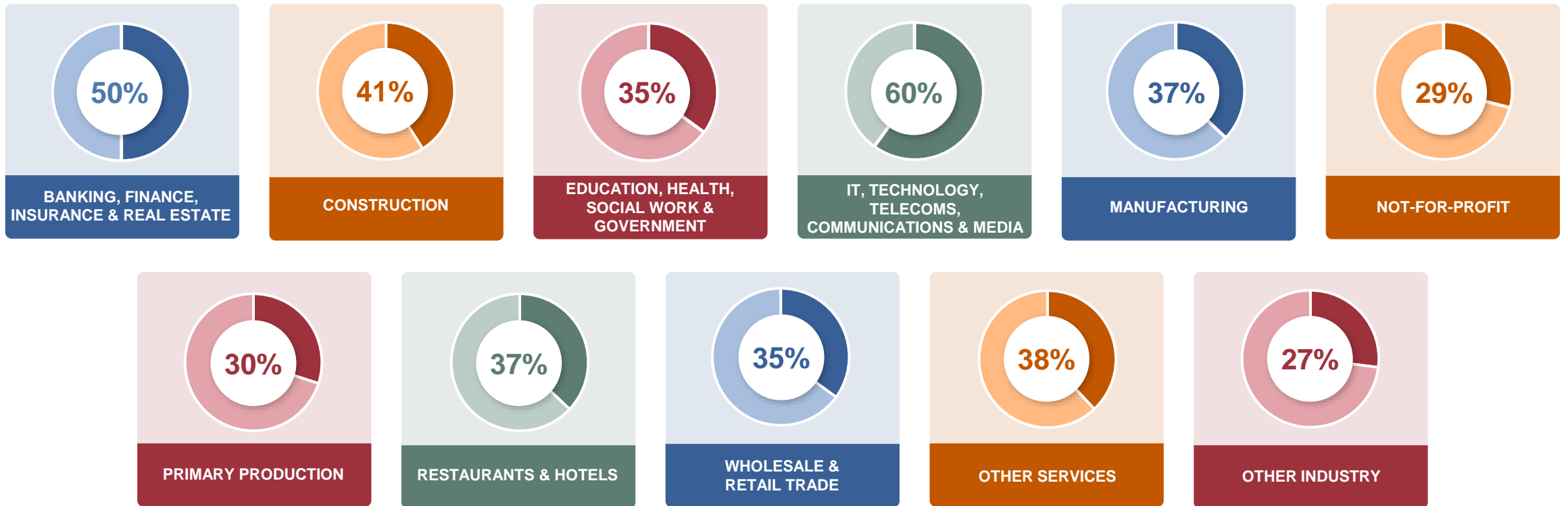


**Quarter-over-quarter outlooks** are down slightly in all four regions.

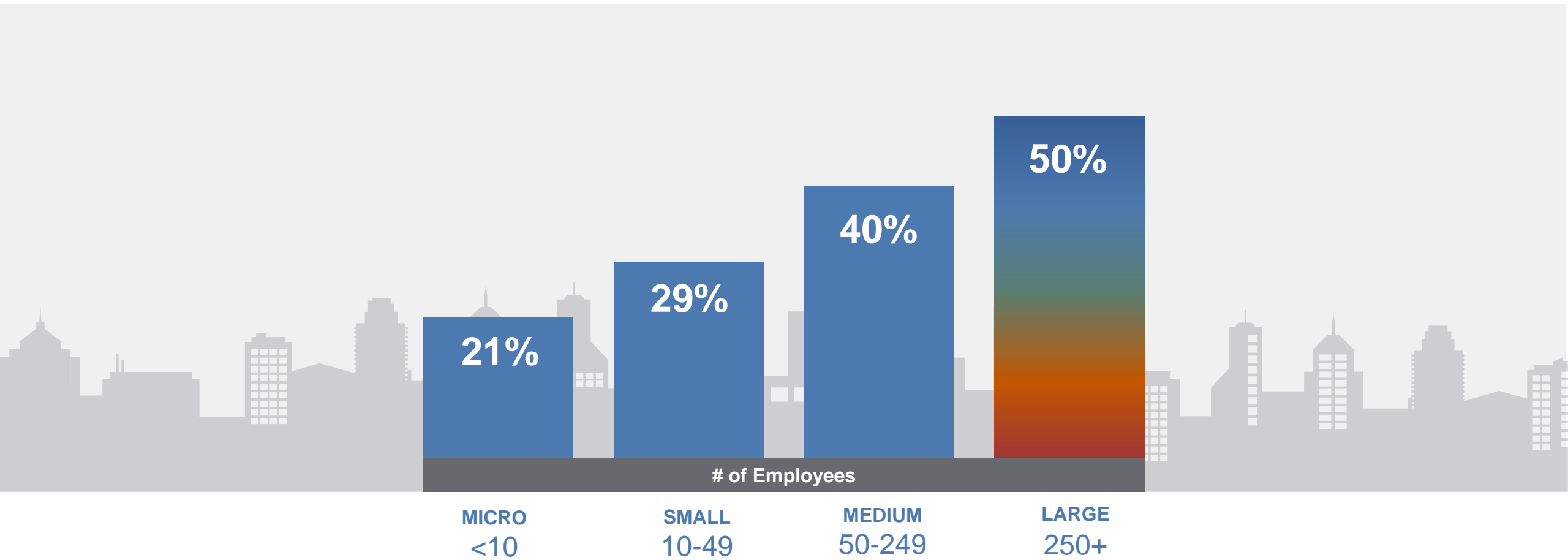


# Growth Expected Across All 11 Industries

As the workplace continues becoming more digitally reliant and tech savvy, employers in the IT, Technology, Telecoms, Communications & Media industry anticipate the strongest staffing climate with a Net Employment Outlook of +60%.



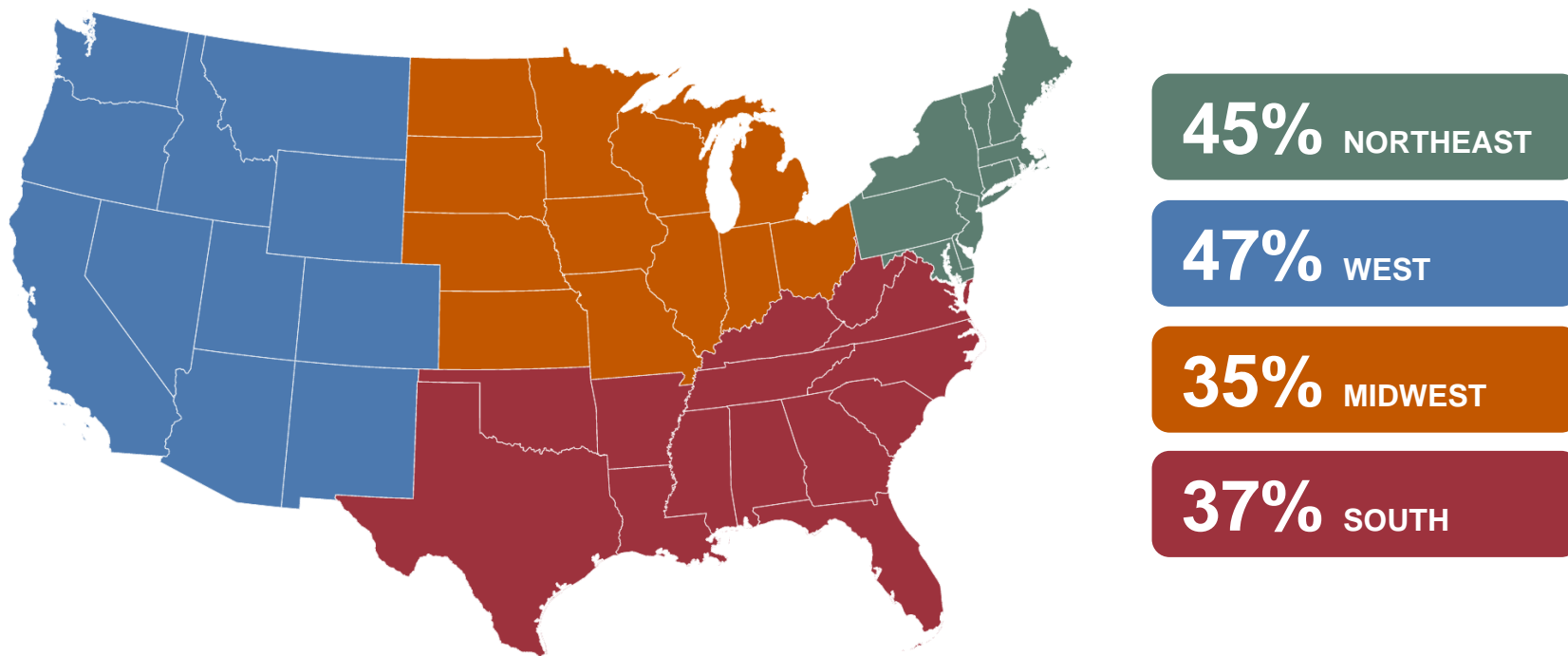
# Large U.S. Organizations Report Strongest Hiring Intentions





# Strongest Hiring Outlooks Across All Regions Since the Survey Began

**Workforce gains are anticipated in all four U.S. regions during the first quarter of 2022** with the most optimism reported in the West. While optimistic, Outlooks weaken when compared to last quarter across each region: Northeast (-5 percentage points), West (-2 percentage points), Midwest (-6 percentage points) and South (-9 percentage points).



# North American Employers Especially Optimistic

**The Net Employment Outlook is substantially stronger in U.S. and Canada when compared to this time last year.**

37% of Canadian employers are planning to add to the payroll in Q1 a 4 point rise from Q4 2021. In the U.S. employers report a 41% net employment outlook, down 5 points from last quarter.

Growth is expected in all 11 industry sectors, regions and company sizes.





## VACCINE EXPECTATIONS:

Over one-half of employers are mandating vaccines in some way for their employees to return to the workplace.



**Only 13%** are letting individual workers decide



# VACCINE EXPECTATIONS FOR ONSITE RETURN

Employers in the U.S. are sharing requirements for employees before they can return to the workplace:



Mandate double  
vaccination and  
require proof for all  
employee roles

**27%**

Proof of double  
vaccination will  
be required for  
some employee  
roles, but not all

**18%**

Plan to require  
proof of double  
vaccination and  
booster shot

**18%**

Urge vaccination  
by highlighting  
the benefits but  
not mandate

**28%**

Offer incentives  
(e.g., cash bonus)  
to encourage  
vaccination

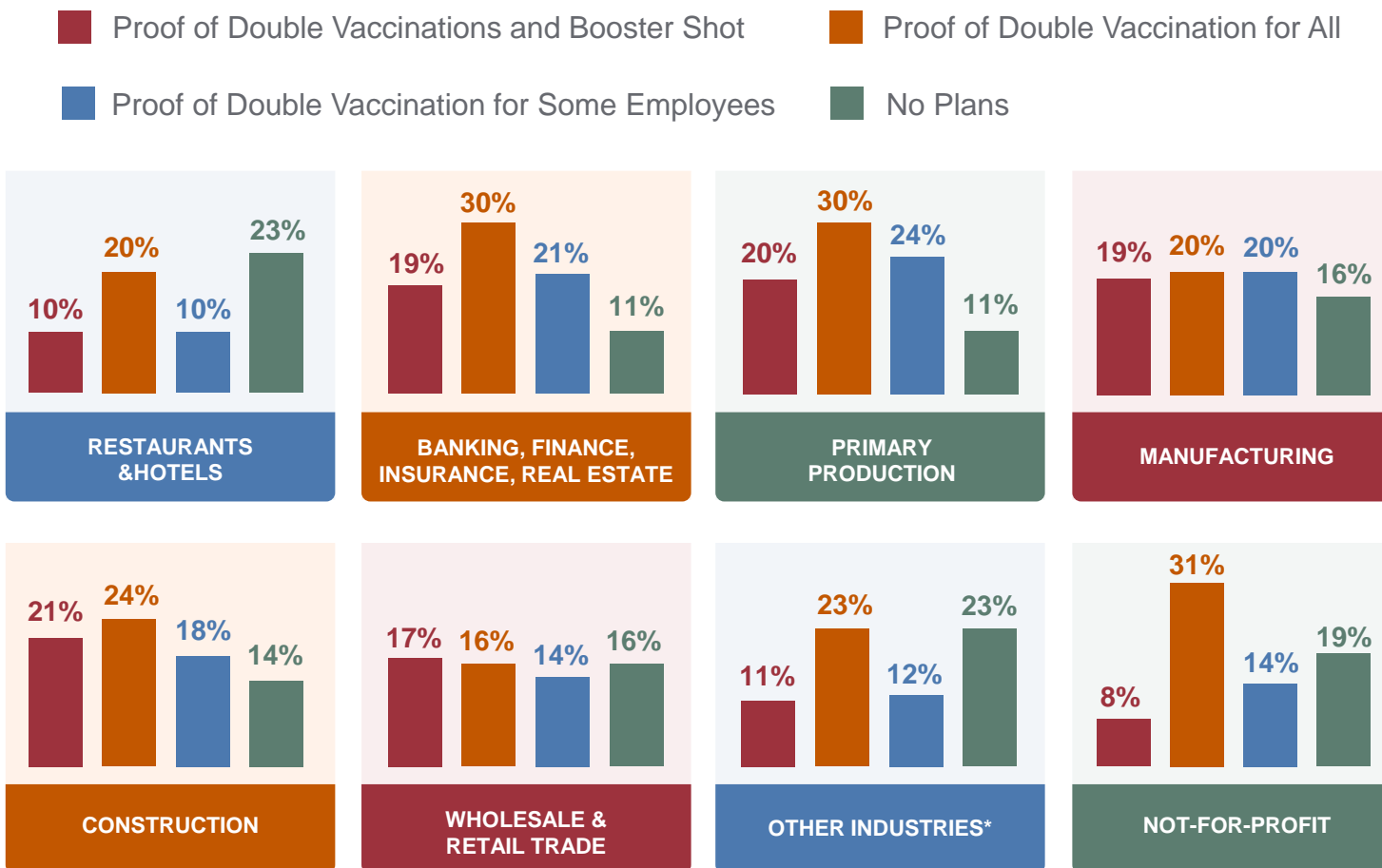
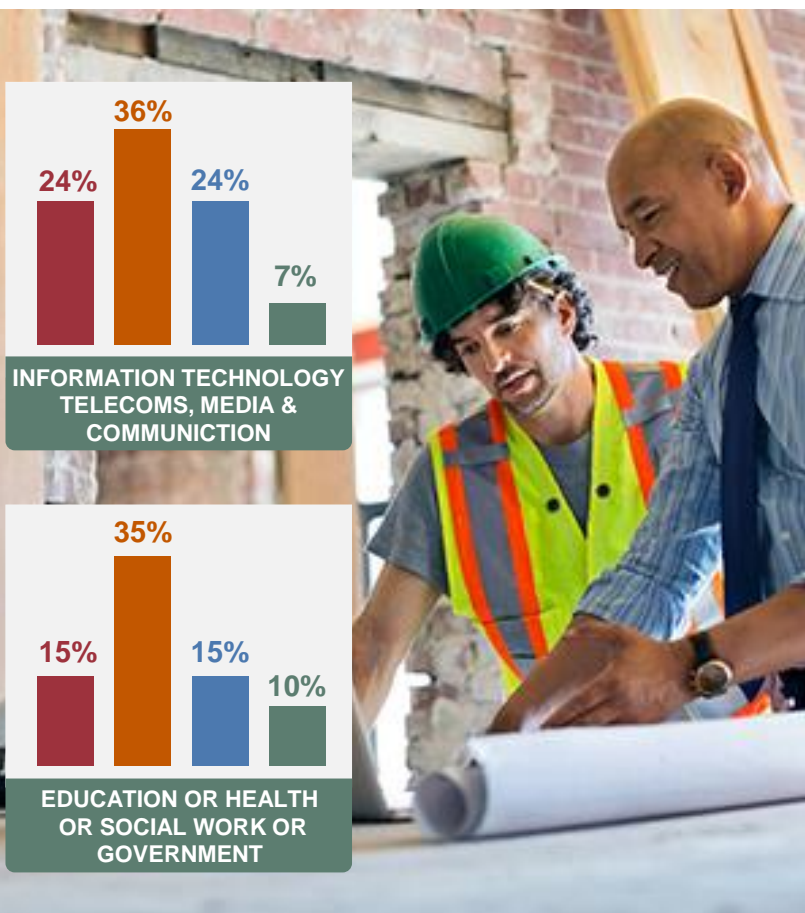
**18%**

Up to  
individuals  
to decide

**13%**

Note: Respondents could choose more than one option, meaning results add up to more than 100%.

# IT, Education & Health Most Likely to Mandate Vaccines for All



\*Includes: Agriculture, Forestry, and Fishing; Mining and Quarrying; Electricity, Gas and Air Conditioning Supply; Water Supply; Sewerage, Waste Management and Remediation Activities

\*\*Includes: Professional, Scientific and Technical Activities; Administrative and Support Services; Other Service Activities



# Employers In South Region of the U.S. Are Less Likely To Mandate Vaccinations & More Likely To Have No Plans

## MANDATING VACCINATIONS

31% Northeast  
30% West  
26% Midwest  
24% South

## INCENTIVIZING VACCINATIONS

19% Northeast  
18% West  
17% Midwest  
18% South

## NO PLANS

10% Northeast  
17% West  
10% Midwest  
15% South

## NONE OF THESE

3% Northeast  
2% West  
3% Midwest  
4% South

\*Respondents could choose more than one option, meaning results add up to more than 100%.





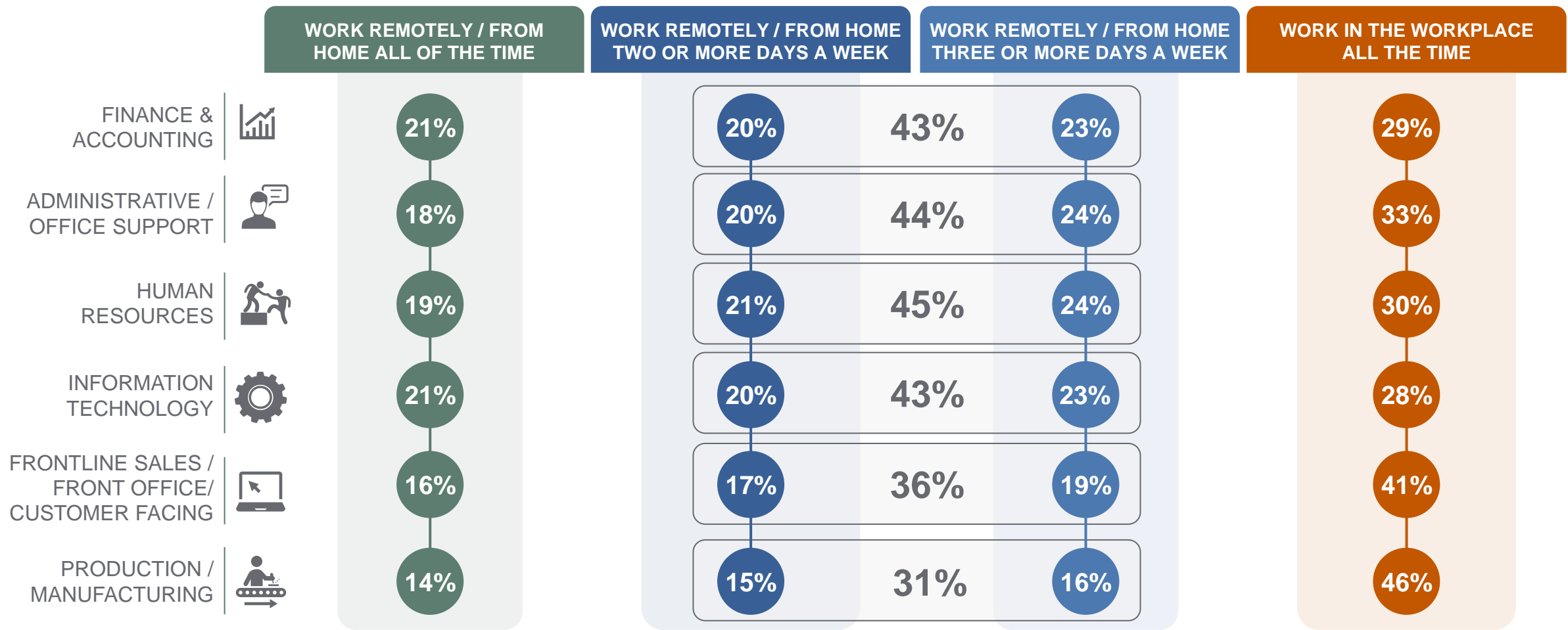
# THE GREAT SHIFT TO HYBRID WORKING:



More employers are embracing  
the blend of work and home



# Even in Frontline, Customer Service & Manufacturing, Employers are Recognizing the Need for Hybrid Work



\*Respondents answering Don't know brings the total up to 100% for all roles

**HYBRID MODEL**  
Working a mix of some days remote and some days in the workplace

**The ManpowerGroup Employment Outlook Survey  
puts a wealth of data at your fingertips.  
Be sure to take a look at this timely resource.  
And contact us for more workforce insights.**

**CONTACT US**





# ABOUT THE MANPOWERGROUP EMPLOYMENT OUTLOOK SURVEY



# About the ManpowerGroup Employment Outlook Survey

The ManpowerGroup Employment Outlook Survey – conducted in October 2021 – is the most comprehensive, forward-looking employment survey of its kind, used globally as a key economic indicator. The Net Employment Outlook is derived by taking the percentage of employers anticipating an increase in hiring activity and subtracting from this the percentage of employers expecting a decrease in hiring activity. Running since 1962, various factors underpin the success of the Survey:

## Unique

It is unparalleled in its size, scope, longevity and area of focus. 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 more than 39,000 public and private employers across 40 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 information from one main question: "How do you anticipate total employment at your location to change in the three months to the end of March 2022 as compared to the current quarter?"

## Survey Methodology

The methodology used to collect the data for the Employment Outlook has been digitized in 40 markets for the Q1 2022 report. Respondents in prior quarters were contacted via telephone. With the shift to remote working and much higher reliance on the internet, responses are now being collected online.

Respondents are members of double opt-in online panels and are incentivized to complete the survey. The question asked and the respondent profile remains unchanged. Size of organization and sector are standardized across all countries to allow international comparisons.

# Notes to Editors

\* The methodology used to collect the data for the Employment Outlook has been digitized in 40 markets for the Q1 2022 report. Respondents in prior quarters were contacted via telephone and data is now being collected online. Respondents are members of double opt-in online panels and are incentivized to complete the survey. In line with standard findings of online surveys, more people are now taking a position – selecting that their workforce will either increase or decrease vs. no change. Because the Net Employment Outlook is based only on the people saying increase or decrease, the result of this higher level of engagement means the methodology shift may contribute to a higher Outlook. With a sample of 1000 there is a margin of error of +/-3%. The question asked and the respondent profile remains unchanged. Size of organization and sector are standardized across all countries to allow international comparisons.

\*\* The survey data was collected in October 2021, before awareness of the Omicron variant.



# A Holistic Workforce Strategy Includes Build, Buy, Borrow and Bridge



Invest in learning and development to grow your pipeline



Go to the external market to attract the talent that cannot be built-in-house



Cultivate communities of talent outside the organization



Help people move on or move up to new roles within the organization

# ManpowerGroup Provides Solutions Across the Entire HR Life Cycle



**Workforce Consulting & Analytics**



**Workforce Management**



**Talent Resourcing**



**Career Management**



**Career Transition**



**Attracting Top Talent**