

Manpower Employment Survey

Net Employment Outlook

Q3 2016

Employers predict a reserved hiring climate for the upcoming quarter

Canadian employers report respectable hiring intentions for the July – September time frame. While 16% forecast an increase in staffing levels, 5% anticipate a decrease and 78% expect no change, resulting in a Net Employment Outlook of +11%.

Once the data is adjusted to allow for seasonal variation, the outlook stands at +5% and is the weakest reported since Outlook Q4 2009. Hiring intentions remain relatively stable quarter-over-quarter but decline by 4 percentage points year-over-year

Net Employment Outlook = +5%

↓1 percent vs. Q2 2016

↓3 percent vs. Q1 2016

“How do you anticipate total employment at your location to change in the three months to the end of September 2016 as compared to the current quarter?”



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Canada	Increase	Decrease	No Change	Don't Know	Net Outlook	Seasonally Adjusted
	%	%	%	%	%	%
2016 Q3	16	5	78	1	11	5
2016 Q2	15	5	78	2	10	6
2016 Q1	9	7	81	3	2	7
2015 Q4	11	9	77	3	2	6
2015 Q3	20	5	74	1	15	9

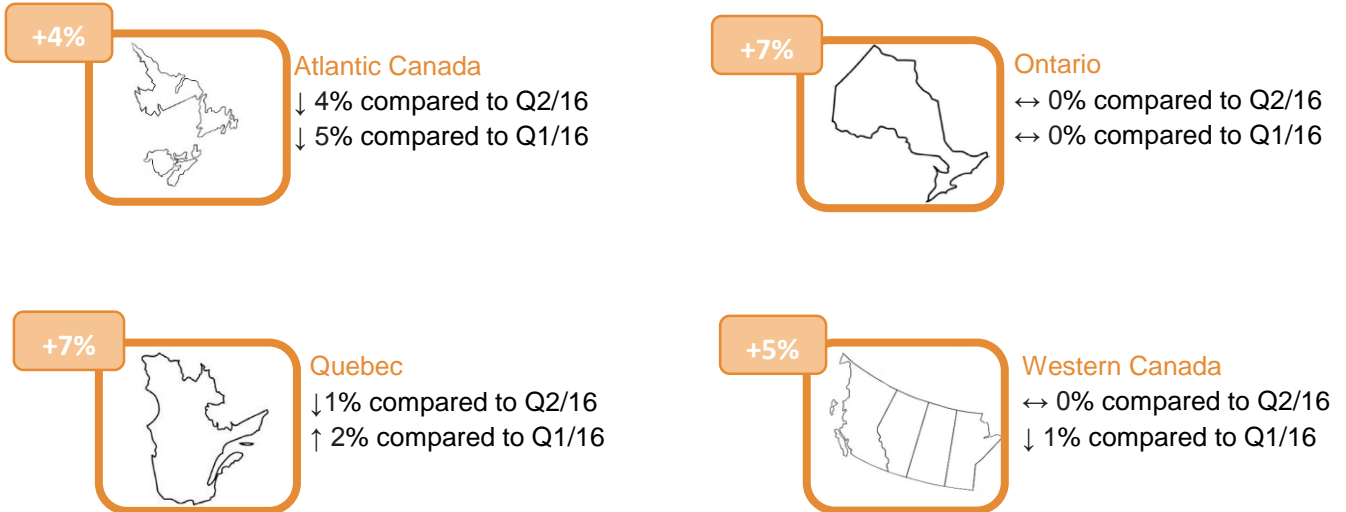
Local Results

Calgary area job seekers should expect a cloudy hiring climate for the third quarter for 2016, decreasing 8 percentage points from the Outlook reported during the same time last year, indicating a sluggish hiring pace for the upcoming months.

Edmonton area employers expect a reserved hiring climate, with a 2 percentage decrease from the Outlook last year, indicating a cautious hiring pace for the upcoming months. Red Deer area job seekers should expect a flat hiring climate, with an increase of 9 percentage points from the Outlook reported during the same time last year, indicating a limited hiring pace.

Regional Comparisons

Across the country, employers in Ontario and Quebec report encouraging signs, both with a seasonally adjusted Net Employment Outlook of 7%. This is followed by Western Canada where the Outlook stands at a fair 5%, indicating a more mild hiring climate. Meanwhile, employers in Atlantic Canada expect a limited hiring pace with an Outlook of just 4%.



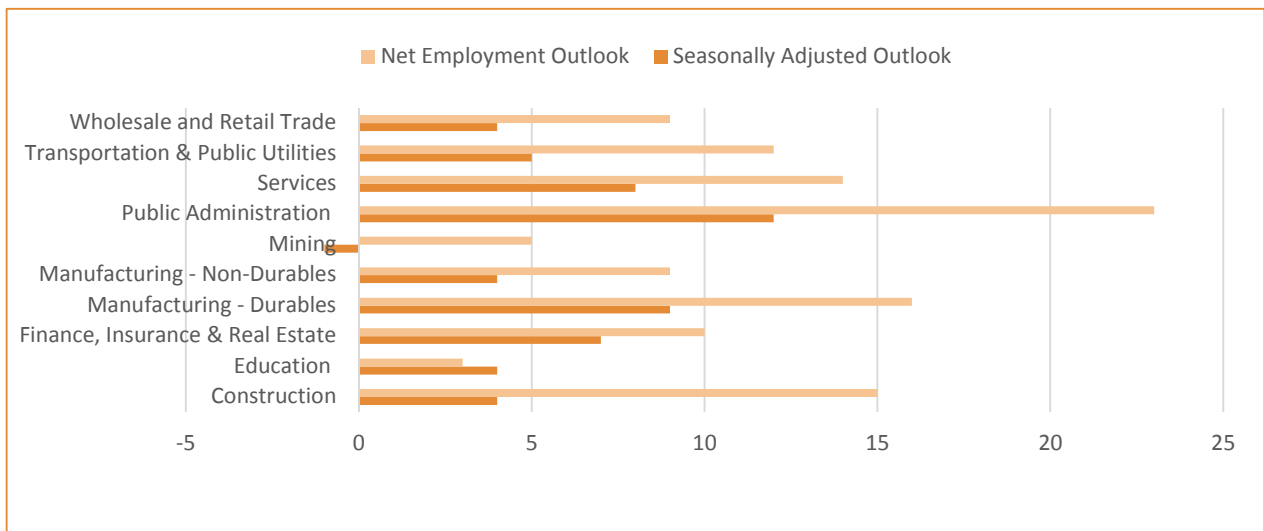
Organization Size Comparisons

Large sized (250+ employees) organizations project the most upbeat hiring prospects for this quarter, reporting an Outlook of 14 per cent once seasonal variations are removed. Medium-sized (50-249 employees) organizations anticipate a fair hiring climate with an Outlook of eight per cent, while small (10-49 employees) and micro-sized (1-9 employees) organizations expect a subdued hiring climate, reporting Outlooks of just four and zero per cent, respectively, for the upcoming quarter.

Size	Increase	Decrease	No Change	Don't Know	Net Outlook	Seasonally Adjusted
	%	%	%	%	%	%
Employees						
Micro (1-9)	6	3	90	1	3	0
Small (10-49)	17	5	77	1	12	4
Med (50-249)	22	6	71	1	16	8
Large (250+)	25	6	65	4	19	14

Sector Comparisons

Of the 10 surveyed industry sectors, employers in the Public Administration sector report the most respectable results for Q3 of 2016, projecting a seasonally adjusted Net Employment Outlook of 12%. This is followed by the Manufacturing – Durables sector reporting a moderately seasonally adjusted Outlook of 9%, while employers in the Services sector report a cautiously optimistic Outlook of 8%.



+4%



Construction

↑ 1% compared to Q2/16
↓ 6% compared to Q3/15

+4%



Education

↔ 0% compared to Q2/16
↑ 1% compared to Q3/15

+7%



Finance, Insurance & Real Estate

↓ 6% compared to Q2/16
↓ 8% compared to Q3/15

+9%



Manufacturing – Durables

↑ 9% compared to Q2/16
↑ 4% compared to Q3/15

+4%



Manufacturing - Non-Durables

↓ 2% compared to Q2/16
↑ 4% compared to Q3/15

-1%



Mining

↑ 1% compared to Q2/16
↓ 2% compared to Q3/15

+12%



Public Administration

↓ 2% compared to Q2/16
↑ 3% compared to Q3/15

+8%



Services

↑ 1% compared to Q2/16
↓ 3% compared to Q3/15

+5%



Transportation & Public Utilities

↓ 4% compared to Q2/16
↓ 11% compared to Q3/15

+4%



Wholesale & Retail Trade

↓ 2% compared to Q2/16
↓ 9% compared to Q3/15

International Employment Outlook

Based on seasonally adjusted survey data, employers expect to grow staffing levels in 40 of the 43 countries and territories during the July – September period. Overall, a number of employers also indicate that overall payroll growth is likely to proceed at a more conservative pace than in the prior quarter or last year at this time. Employers report the most optimistic hiring intentions in India, Japan, Taiwan, Guatemala, Romania and the U.S., while the weakest hiring prospects are reported in Brazil, Italy and Switzerland. Quarter-over-quarter, hiring intentions strengthen in 14 out of 42 countries and territories where data is available. Meanwhile, Outlooks decline in 21 countries and territories compared with the previous quarter and are unchanged in seven.

Asia Pacific

Employers forecast job gains in all eight Asia Pacific countries and territories during the next three months. However, hiring prospects weaken in five countries/territories. Indian employers report the strongest regional and global hiring intentions for the fourth consecutive quarter, while the weakest regional labour market is expected in China.

Americas

Payrolls are expected to increase in nine of the 10 Americas countries during Q3 2016. Quarter-over-quarter, the Net Employment Outlook weakens in nine countries and is unchanged in the tenth. When compared with Q3 2015, hiring prospects improve in two countries but weaken in seven. Employers in Guatemala and the US report the most optimistic hiring prospects in the region, while the weakest and only negative hiring activity is expected in Brazil.

EMEA

An increase in staffing levels is anticipated in 23 of the 25 countries in the EMEA region during Q3 2016, while employers in two countries forecast flat hiring activity. When compared with the previous quarter, Outlooks improve in 12 of the 24 countries where data is available, but decline in seven. When compared with Q3 2015, hiring prospects strengthen in 10 countries but decline in 12. Romanian employers report the strongest hiring intentions, while the weakest Outlooks are reported in Italy and Switzerland. For the first quarter in eight years no EMEA country is reporting a negative Outlook.

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