

Q2/2014

Manpower Employment Outlook Survey Canada

A Manpower Research Report



Q2/14

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Throughout this report, we use the term “Net Employment Outlook”. This figure is derived by taking the percentage of employers anticipating total employment to increase, and subtracting from this, the percentage expecting to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook.

Canada Employment Outlook

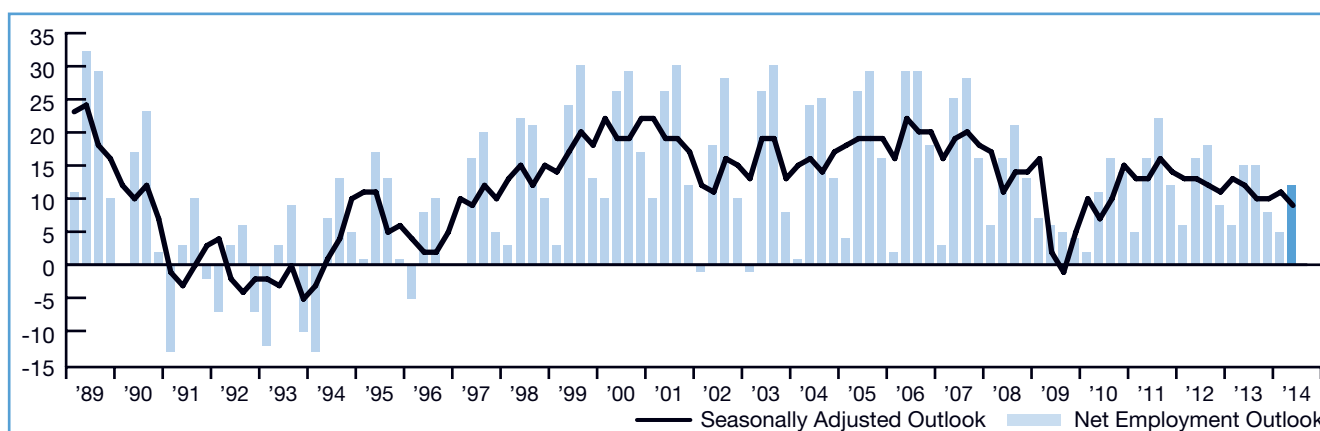
The Manpower Employment Outlook Survey for the second quarter 2014 was conducted by interviewing a representative sample of over 1,900 employers in Canada.

All survey participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of June 2014 as compared to the current quarter?”

Canadian employers report steady hiring intentions for the April-June time frame. With 16% of employers expecting to increase staffing levels, 4% anticipating a decrease and 78% forecasting no change, the resulting Net Employment Outlook stands at +12%.

When compared with Quarter 1 2014, hiring prospects are seven percentage points stronger, but employers report a three percentage point decline year-over-year.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
2nd Quarter 2014	16	4	78	2	12	9
1st Quarter 2014	13	8	78	1	5	11
4th Quarter 2013	16	8	74	2	8	10
3rd Quarter 2013	21	6	71	2	15	10
2nd Quarter 2013	20	5	75	0	15	12



No bar indicates Net Employment Outlook of zero.

Once the data is adjusted to allow for seasonal variation, employers report an Outlook of +9%. The Outlook is the weakest since Quarter 2 2010, following declines of two and three percentage points quarter-over-quarter and year-over-year, respectively.

From this point forward, all data discussed in the commentary is seasonally adjusted, unless stated otherwise.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
Construction	24	5	67	4	19	13
Education	15	5	79	1	10	10
Finance, Insurance & Real Estate	17	4	79	0	13	12
Manufacturing – Durables	16	3	80	1	13	9
Manufacturing – Non-Durables	10	6	83	1	4	0
Mining	15	6	78	1	9	9
Public Administration	19	3	77	1	16	10
Services	15	3	80	2	12	9
Transportation & Public Utilities	20	3	76	1	17	13
Wholesale & Retail Trade	17	5	75	3	12	9

Regional Comparisons

Atlantic Canada +14 (10)%

Employers report encouraging signs for job seekers in the upcoming quarter with a Net Employment Outlook of +10%. The Outlook is two percentage points stronger when compared with the previous quarter and remains relatively stable year-over-year.

Staffing levels are expected to increase in eight of the 10 industry sectors during Quarter 2 2014. The strongest hiring plans are reported in the Mining sector where the Outlook stands at +27%. Steady job gains are forecast in the Finance, Insurance & Real Estate sector and the Construction sector, with Outlooks of +16% and +15%, respectively. The Manufacturing – Durables sector Outlook stands at +13% and Wholesale & Retail Trade sector employers report a cautiously optimistic Outlook of +10%. Services sector employers forecast some payroll growth with an Outlook of +9%, but this is the weakest forecast since Quarter 1 2011. Meanwhile, Transportation & Public Utilities sector employers match the weakest forecast since the sector analysis began in Quarter 1 2004 with an Outlook of -1%, last reported in Quarter 1 2012.

When compared with the previous quarter, hiring intentions strengthen in five of the 10 industry sectors, most notably by 28 percentage points in the Construction sector. Finance, Insurance & Real Estate sector employers report an improvement of 16 percentage points and Outlooks strengthen by 12 and seven percentage points in the Manufacturing – Non-Durables sector and the Manufacturing – Durables sector, respectively. Elsewhere, hiring plans weaken in five sectors. The most notable decline of 12 percentage points is reported in the Mining sector.

Year-over-year, employers report weaker hiring intentions in seven of the 10 industry sectors. The Transportation &

Public Utilities sector Outlook declines by 15 percentage points while the Manufacturing – Non-Durables sector Outlook is 14 percentage points weaker. Outlooks decline by 10 percentage points in the Services sector and by eight percentage points in both the Education sector and the Finance, Insurance & Real Estate sector.

However, hiring intentions strengthen in three sectors, most notably by a steep margin of 34 percentage points in the Construction sector. Mining sector employers report a 14 percentage point improvement and the Public Administration sector Outlook is 10 percentage points stronger.

Payrolls are expected to grow in six of the seven areas during the next three months. The strongest hiring prospects are reported in Moncton, with an Outlook of +21% and Cape Breton Area, where the Outlook stands at +15%. Steady job growth is also forecast in St. John's and Fredericton, with Outlooks of +13% and +12%, respectively. Meanwhile, Saint John employers report uncertain hiring intentions with an Outlook of -3%.

Hiring prospects improve in four areas quarter-over-quarter. The most noteworthy increases of 14 and nine percentage points are reported for St. John's and Cape Breton Area, respectively. Elsewhere, hiring plans weaken in three areas, including Saint John and Charlottetown, where Outlooks decline by eight and six percentage points, respectively.

Year-over-year, employers in four areas report improved hiring prospects. The most notable increases of six percentage points are reported in both Fredericton and Saint John. However, employers report weaker hiring plans in three areas, including St. John's and Charlottetown, with declines of 13 and 12 percentage points, respectively.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
All Industries	19	5	76	0	14	10
Construction	33	8	58	1	25	15
Education	15	10	75	0	5	2
Finance, Insurance & Real Estate	14	0	86	0	14	16
Manufacturing – Durables	25	8	67	0	17	13
Manufacturing – Non-Durables	15	8	77	0	7	0
Mining	40	7	53	0	33	27
Public Administration	13	13	74	0	0	5
Services	15	0	85	0	15	9
Transportation & Public Utilities	6	6	88	0	0	-1
Wholesale & Retail Trade	20	5	75	0	15	10

Ontario +11 (8)%

Some workforce gains are forecast for the April-June time frame with employers reporting a Net Employment Outlook of +8%. Hiring intentions are unchanged when compared with the previous quarter and remain relatively stable year-over-year.

Employers in nine of the 10 industry sectors expect to grow staffing levels during Quarter 2 2014. The strongest labour market is anticipated in the Public Administration sector where the Outlook of +23% is the most optimistic since Quarter 4 2007. Transportation & Public Utilities sector employers expect a steady hiring pace, reporting an Outlook of +15%, while Outlooks stand at +12% and +11% in the Finance, Insurance & Real Estate sector and the Manufacturing – Durables sector, respectively. Education sector employers report the strongest hiring intentions since Quarter 4 2010 with an Outlook of +9% and the Construction sector Outlook also stands at +9%. Meanwhile, the Services sector Outlook of +7% is the weakest since Quarter 1 2010 and Wholesale & Retail Trade sector employers report the weakest Outlook since Quarter 4 2009, standing at +8%. Mining sector employers report uncertain hiring intentions with an Outlook of -1%.

When compared with the previous quarter, employers report weaker hiring prospects in five of the 10 industry sectors. The most notable Outlook declines of five and three percentage points are reported in the Manufacturing – Non-Durables sector and the Construction sector, respectively. However, hiring intentions improve in four sectors. The Outlook for the Public Administration sector is 19 percentage points stronger and an increase of seven percentage points is reported in the Transportation & Public Utilities sector.

Employers in six of the 10 industry sectors report weaker hiring prospects when compared with Quarter 2 2013.

The Construction sector Outlook declines by 10 percentage points while decreases of seven and five percentage points are reported in the Transportation & Public Utilities sector and the Mining sector, respectively. Elsewhere, hiring plans improve in four sectors, most notably by 11 percentage points in the Public Administration sector. Outlooks are nine percentage points stronger in both the Education sector and the Finance, Insurance & Real Estate sector.

Payrolls are expected to grow in 23 of the 24 areas during Quarter 2 2014 with the most respectable Outlooks of +17% reported in both Hamilton and St. Catharines.

Employers in both Brampton and Kitchener/Cambridge Area report hopeful hiring plans with Outlooks of +16%, while Outlooks stand at +14% in both Durham Region and Fort Erie. Meanwhile, Ottawa employers report uncertain hiring intentions with an Outlook of -2%.

Hiring prospects improve in 10 areas quarter-over-quarter, with the most notable improvement of 11 percentage points in St. Catharines. Welland/Port Colborne employers report a moderate improvement of five percentage points. However, hiring prospects decline in 11 areas, including Kingston and Niagara Falls, with decreases of 12 and nine percentage points, respectively.

Year-over-year, Outlooks strengthen in nine areas, including St. Catharines where employers report an increase of 10 percentage points. Brampton and Northumberland County Outlooks are seven percentage points stronger. Meanwhile, employers in 15 areas report weaker hiring intentions. The Outlook for Thunder Bay declines by 13 percentage points and decreases of 10 and nine percentage points are reported in Ottawa and Niagara Falls, respectively.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
All Industries	15	4	79	2	11	8
Construction	16	2	77	5	14	9
Education	11	3	84	2	8	9
Finance, Insurance & Real Estate	17	3	79	1	14	12
Manufacturing – Durables	15	2	82	1	13	11
Manufacturing – Non-Durables	11	5	84	0	6	5
Mining	9	9	79	3	0	-1
Public Administration	33	0	65	2	33	23
Services	13	4	81	2	9	7
Transportation & Public Utilities	24	3	72	1	21	15
Wholesale & Retail Trade	15	5	73	2	10	8

Quebec +9 (5)%

Some workforce gains are expected in Quarter 2 2014 with employers reporting a Net Employment Outlook of +5%. Hiring plans improve by three percentage points when compared with the previous quarter but employers report a three percentage point decline year-over-year.

Employers in nine of the 10 industry sectors expect to grow staffing levels during the next three months. Education sector employers report the most positive hiring intentions with an Outlook of +19% and steady hiring activity is forecast for both the Public Administration sector and the Services sector, with Outlooks standing at +15%. Employers in both the Finance, Insurance & Real Estate sector and the Mining sector report respectable hiring plans with Outlooks of +11%. Meanwhile, Manufacturing – Non-Durables sector employers anticipate an uncertain hiring pace, reporting an Outlook of -3%. Wholesale & Retail Trade sector employers report the weakest hiring prospects since the sector analysis was first carried out in Quarter 1 2004 with a Net Employment Outlook of +1%.

Hiring intentions strengthen in six of the 10 industry sectors when compared with Quarter 1 2014. Mining sector employers report a sharp improvement of 28 percentage points while the Finance, Insurance & Real Estate sector Outlook is 15 percentage points stronger. Outlooks also improve by 11 percentage points in the Transportation & Public Utilities sector and eight percentage points in the Services sector. However, employers in four sectors report weaker hiring prospects, most notably in the Manufacturing – Durables sector where the Outlook declines by eight percentage points.

Year-over-year, Outlooks strengthen in six of the 10 industry sectors, The Education sector Outlook improves

by 18 percentage points and an increase of 12 percentage points is reported in the Public Administration sector. Hiring prospects improve by eight and five percentage points in the Mining sector and the Finance, Insurance & Real Estate sector, respectively. Elsewhere, hiring intentions weaken in four sectors. Outlooks decline by 11 and 10 percentage points in the Manufacturing – Non-Durables sector and the Wholesale & Retail Trade sector, respectively.

Seasonally adjusted data is available for four of the five areas in Quebec. Employers in three of the four areas expect to increase staffing levels during the forthcoming quarter. Quebec City employers report the most upbeat Outlook of +10%, while some payroll gains are expected in Montreal, where the Outlook stands at +6%. However, Monteregie (formerly Granby) employers expect payrolls to decline, reporting an Outlook of -7%.

When compared with Quarter 1 2014, hiring intentions improve in three of the four areas, most notably by four percentage points in both Montreal and Eastern Townships (formerly Sherbrooke). The Quebec City Outlook remains relatively stable.

Year-over-year, the Outlook for Quebec City is four percentage points stronger. However, hiring plans weaken in both Monteregie (formerly Granby) and Eastern Townships (formerly Sherbrooke), declining by 19 and four percentage points, respectively.

Based on unadjusted survey data, employers in Laval report cautiously optimistic hiring intentions for Quarter 2 2014 with an Outlook of +7%. Hiring prospects are seven percentage points stronger when compared with Quarter 1 2014.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
All Industries	16	7	77	0	9	5
Construction	23	8	69	0	15	8
Education	31	13	56	0	18	19
Finance, Insurance & Real Estate	23	8	69	0	15	11
Manufacturing – Durables	14	11	75	0	3	4
Manufacturing – Non-Durables	4	7	89	0	-3	-3
Mining	18	7	75	0	11	11
Public Administration	0	0	100	0	0	15
Services	19	0	81	0	19	15
Transportation & Public Utilities	13	6	81	0	7	6
Wholesale & Retail Trade	16	11	71	2	5	1

Western Canada +13 (13)%

Employers forecast a steady hiring pace in the next three months, reporting a Net Employment Outlook of +13%. However, hiring intentions decline by two and four percentage points quarter-over-quarter and year-over-year, respectively.

Payrolls are expected to grow in all 10 industry sectors during the coming quarter. The healthiest hiring plans are reported in the Construction sector where the Outlook stands at +28%. An upbeat hiring pace is forecast for three sectors with Outlooks of +17% – the Education sector, the Mining sector and the Transportation & Public Utilities sector. Manufacturing – Durables sector employers expect a hopeful hiring climate, reporting a Net Employment Outlook of +15%, while Outlooks stand at +14% and +13% in the Wholesale & Retail Trade sector and the Public Administration sector, respectively.

Employers report Outlook declines in six of the 10 industry sectors when compared with the previous quarter. The Wholesale & Retail Trade sector Outlook declines by six percentage points while hiring prospects for the Finance, Insurance & Real Estate sector are five percentage points weaker. Meanwhile, hiring intentions improve in two sectors, most notably by nine percentage points in the Education sector.

When compared with Quarter 2 2013, employers report weaker hiring prospects in seven of the 10 industry sectors. The Transportation & Public Utilities sector Outlook declines by 15 percentage points while a decrease of 10 percentage points is reported by Finance, Insurance & Real Estate sector employers. The Outlook for the Manufacturing – Durables sector is seven percentage

points weaker and Outlooks decline by four percentage points in both the Mining sector and the Services sector. Elsewhere, employers report stronger hiring intentions in three sectors, including the Education sector and the Public Administration sector, where Outlooks improve by four percentage points.

Employers in all 11 areas expect to grow staffing levels during the next three months. The brightest labour markets are forecast by employers in Edmonton and Winnipeg, where Outlooks stand at +32% and +20%, respectively. Employers in both Regina and Richmond-Delta report upbeat hiring prospects with Outlooks of +16%. Meanwhile, the most cautious Outlook of +4% is reported in Saskatoon.

Quarter-over-quarter, hiring intentions weaken in seven of the 11 areas. The most noteworthy declines of 24 and 12 percentage points are reported in Red Deer and Saskatoon, respectively. Meanwhile, hiring prospects strengthen in three areas. Employers in Richmond-Delta report a considerable Outlook improvement of 10 percentage points and the Outlook for Edmonton increases by five percentage points.

Hiring intentions weaken in nine of the 11 areas year-over-year. The Saskatoon Outlook declines by a steep margin of 23 percentage points while Red Deer employers report a decrease of 12 percentage points. Outlooks weaken by 10 percentage points in both Surrey and Victoria & Capital Regional District. Elsewhere, hiring plans strengthen in two areas, most notably by eight percentage points in Winnipeg.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
All Industries	17	4	77	2	13	13
Construction	32	6	57	5	26	28
Education	15	3	82	0	12	17
Finance, Insurance & Real Estate	16	5	78	1	11	12
Manufacturing – Durables	18	0	82	0	18	15
Manufacturing – Non-Durables	10	5	80	5	5	7
Mining	14	2	83	1	12	17
Public Administration	6	6	88	0	0	13
Services	15	5	77	3	10	12
Transportation & Public Utilities	22	2	76	0	20	17
Wholesale & Retail Trade	20	3	73	4	17	14

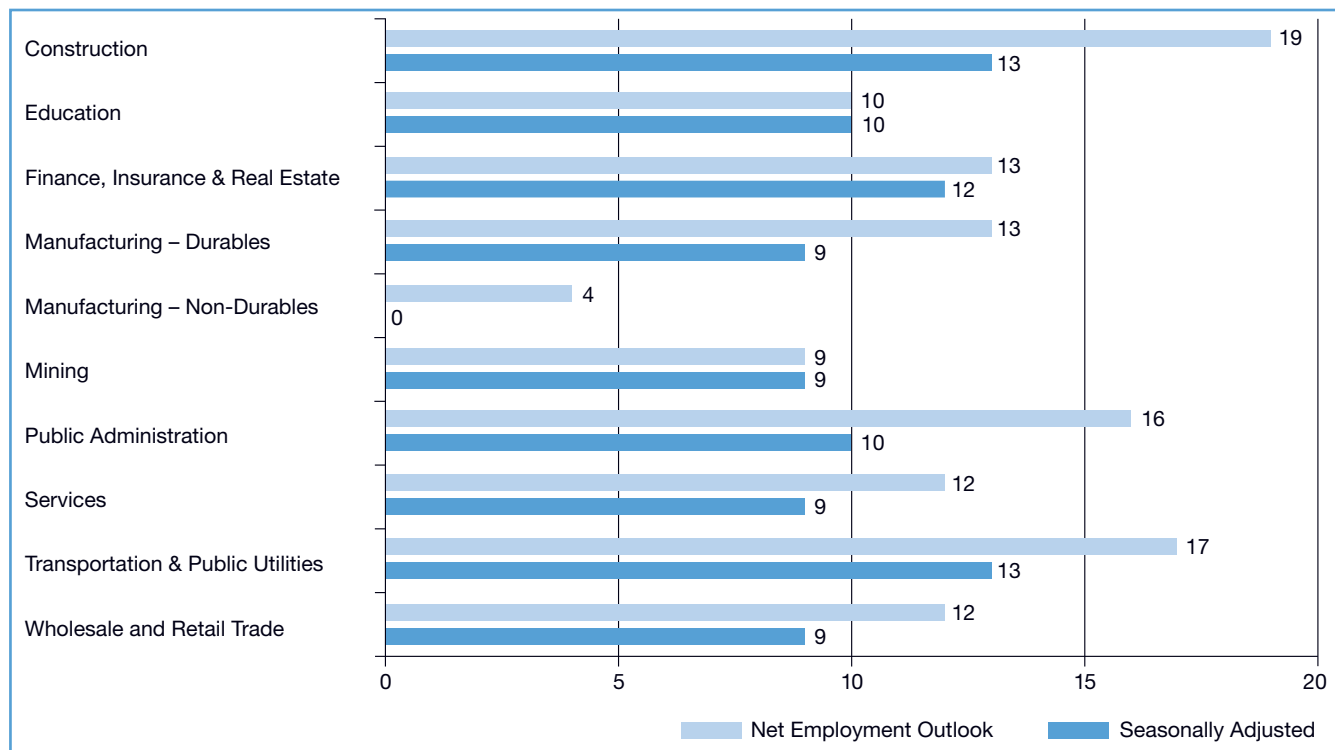
Sector Comparisons

Employers anticipate job gains in nine of the 10 industry sectors during the coming quarter. The most respectable hiring prospects are reported in two sectors with Net Employment Outlooks of +13% – the Construction sector and the Transportation & Public Utilities sector. A steady hiring pace is also anticipated in the Finance, Insurance & Real Estate sector where the Outlook stands at +12%. Outlooks of +10% reflect cautiously optimistic hiring plans in both the Education sector and the Public Administration sector. Meanwhile, Manufacturing – Non-Durables sector employers anticipate a flat labour market, reporting an Outlook of 0%.

Hiring prospects improve in four of the 10 industry sectors when compared with the previous quarter. The most noteworthy improvement of eight percentage points is reported in the Transportation & Public Utilities sector while the Outlook for the Mining sector

is four percentage points stronger. However, hiring intentions weaken in four sectors, most notably by seven percentage points in the Manufacturing – Durables sector. Outlooks also decline by five and four percentage points in the Manufacturing – Non-Durables sector and the Wholesale & Retail Trade sector, respectively.

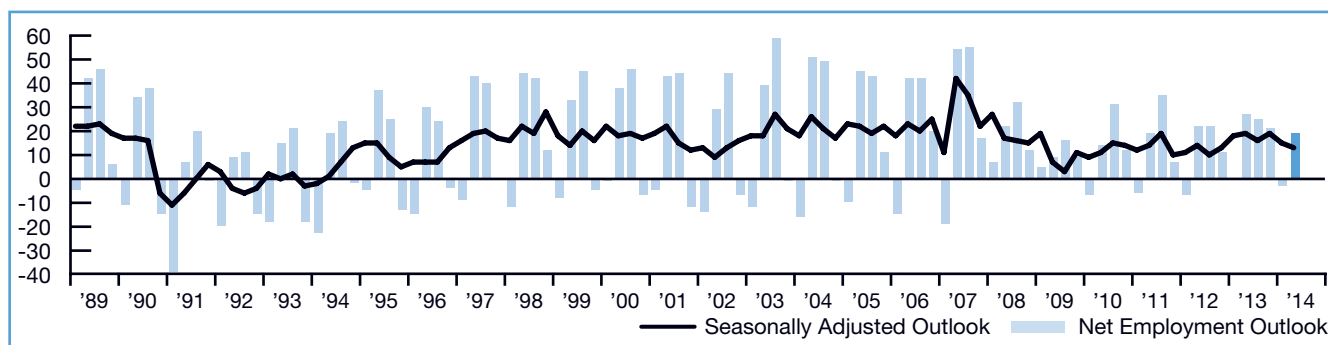
Year-over-year, employers in five sectors report weaker hiring plans. The Transportation & Public Utilities sector Outlook declines by eight percentage points while decreases of six percentage points are reported in three sectors – the Construction sector, the Manufacturing – Non-Durables sector and the Wholesale & Retail Trade sector. Elsewhere, hiring intentions improve in five sectors, most notably by five percentage points in the Education sector and by four percentage points in the Public Administration sector.



Construction +19 (13)%

Job seekers can expect a favourable hiring climate in the upcoming quarter, according to employers who report a Net Employment Outlook of +13%.

However, hiring prospects weaken by two and six percentage points quarter-over-quarter and year-over-year, respectively.

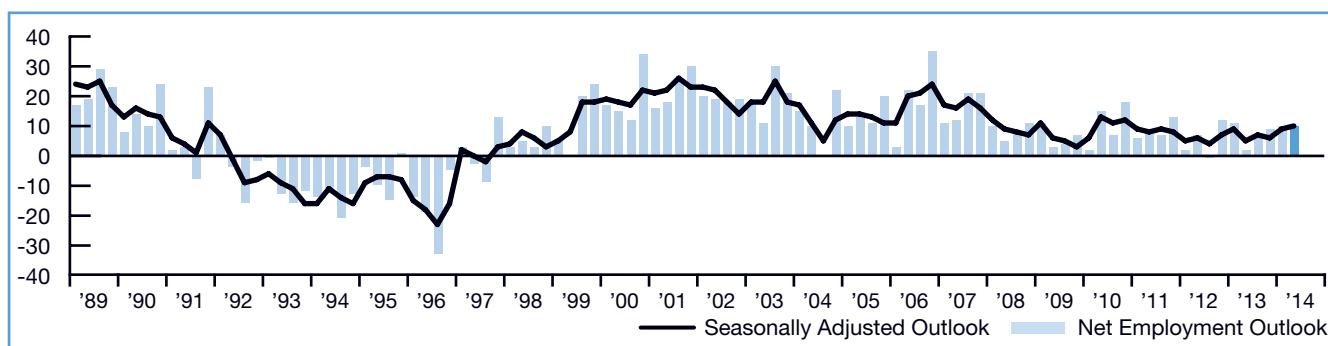


No bar indicates Net Employment Outlook of zero.

Education +10 (10)%

With a Net Employment Outlook of +10% for the next three months, employers forecast the most upbeat hiring pace since Quarter 4 2010. While the Outlook

remains relatively stable quarter-over-quarter, employers report a five percentage point year-over-year improvement.

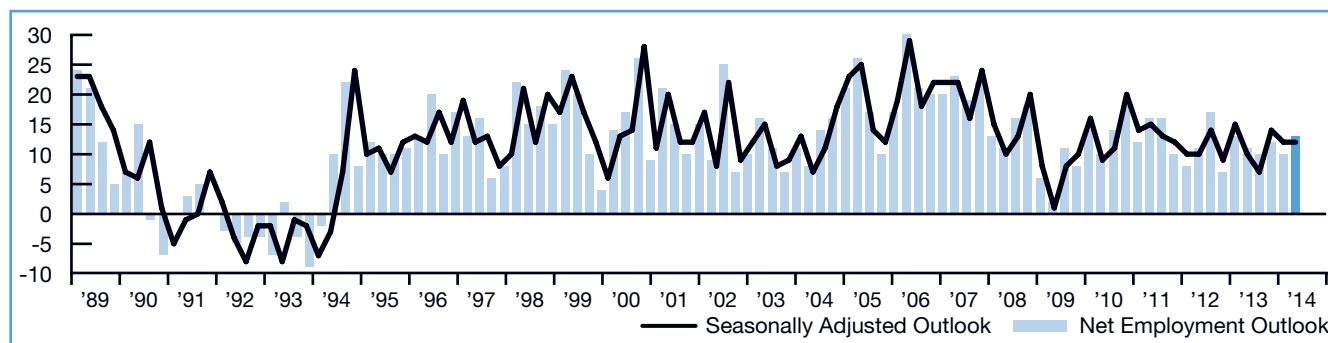


No bar indicates Net Employment Outlook of zero.

Finance, Insurance & Real Estate +13 (12)%

Respectable payroll gains are anticipated in the April-June time frame with employers reporting a Net Employment Outlook of +12%. Hiring prospects are

unchanged quarter-over-quarter and improve by two percentage points year-over-year.

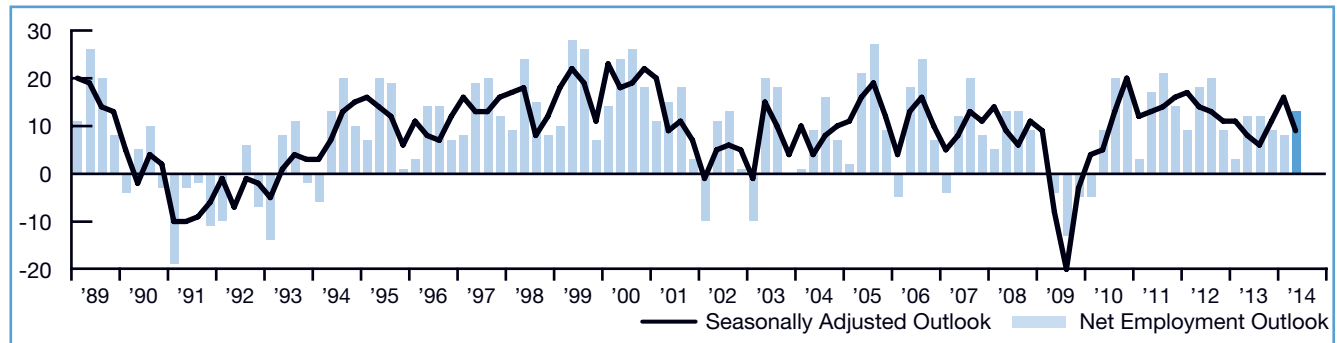


No bar indicates Net Employment Outlook of zero.

Manufacturing – Durable Goods +13 (9)%

Employers report cautiously optimistic hiring plans for Quarter 2 2014 with a Net Employment Outlook of +9%. Hiring intentions weakened by seven percentage

points when compared with the previous quarter but remain relatively stable year-over-year.

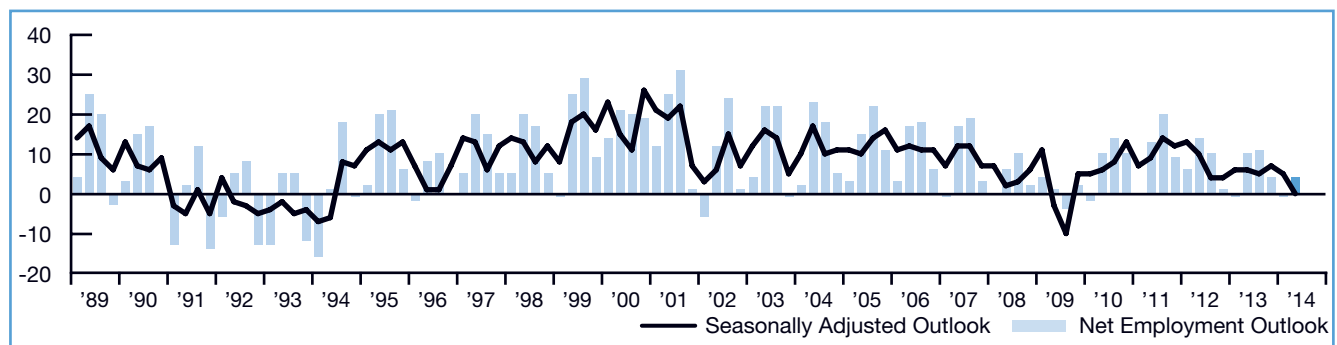


No bar indicates Net Employment Outlook of zero.

Manufacturing – Non-Durable Goods +4 (0)%

The weakest labour market since Quarter 3 2009 is anticipated in the coming quarter, with employers reporting a flat Net Employment Outlook of 0%.

Hiring prospects decline by five percentage points quarter-over-quarter and are six percentage points weaker year-over-year.

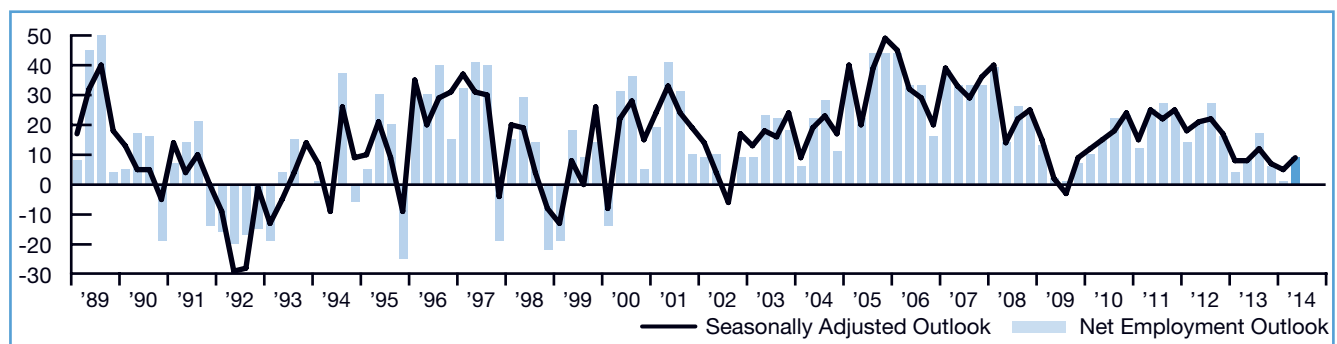


No bar indicates Net Employment Outlook of zero.

Mining +9 (9)%

Job seekers can expect to benefit from some hiring opportunities in the upcoming quarter, according to employers who report a Net Employment Outlook

of +9%. The Outlook is four percentage points stronger quarter-over-quarter and remains relatively stable when compared with Quarter 2 2013.

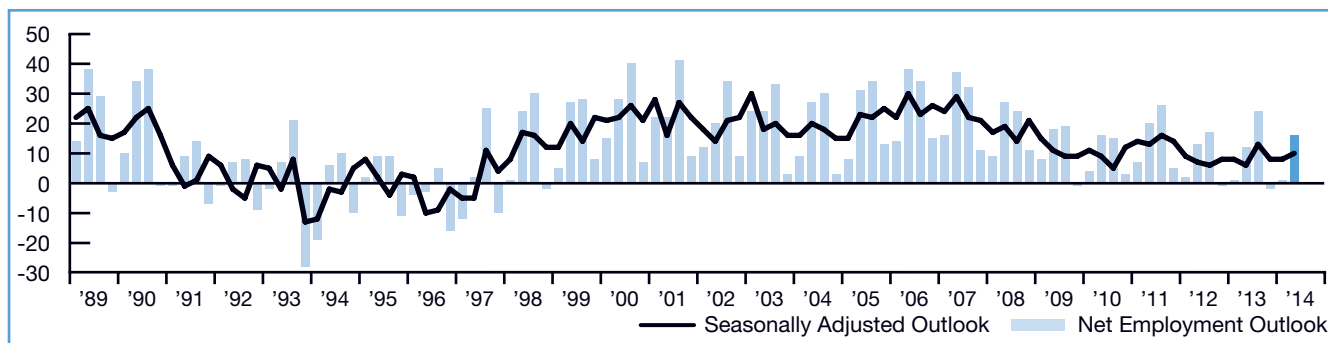


No bar indicates Net Employment Outlook of zero.

Public Administration +16 (10)%

Employers anticipate a steady hiring pace in the next three months, reporting a Net Employment Outlook of +10%. Hiring intentions improve by two percentage

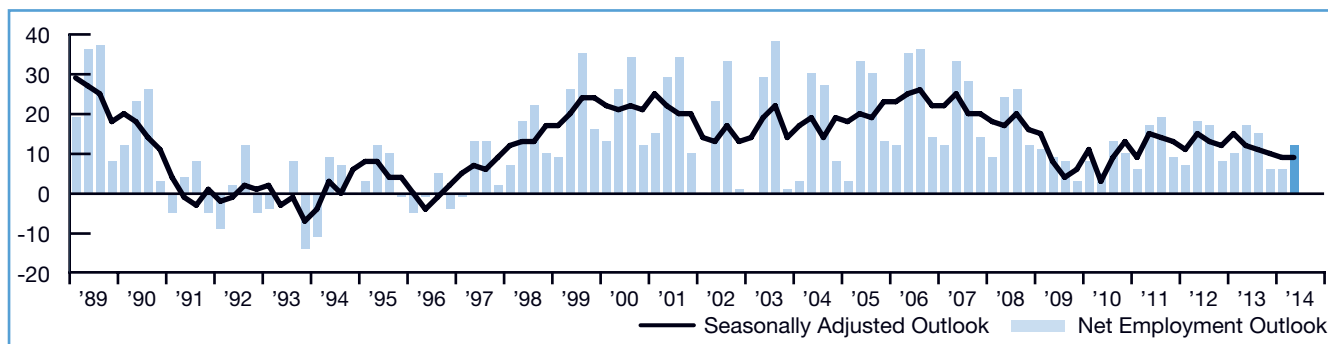
points quarter-over-quarter and four percentage points year-over-year.



Services +12 (9)%

With a Net Employment Outlook of +9% employers report encouraging signs for job seekers in the April-June time frame. Hiring prospects are

unchanged when compared with the previous quarter but decline by three percentage points year-over-year.

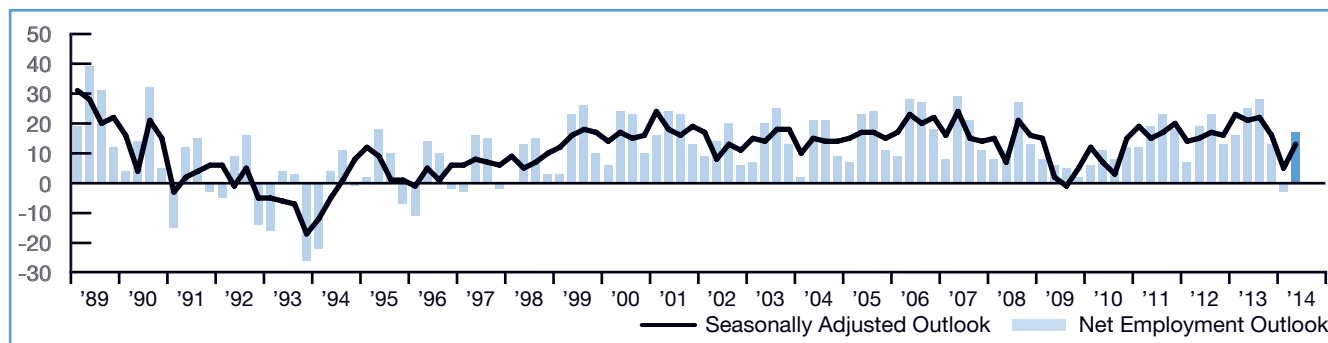


No bar indicates Net Employment Outlook of zero.

Transportation & Public Utilities +17 (13)%

Respectable payroll gains are forecast for Quarter 2 2014 with employers reporting a Net Employment Outlook of +13%. While the Outlook is eight

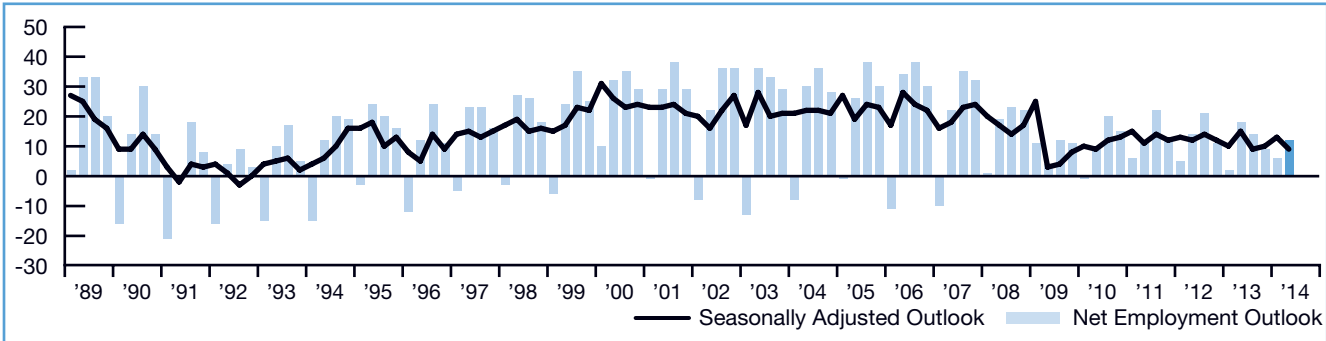
percentage points stronger quarter-over-quarter, employers also report an eight percentage point year-over-year decline.



No bar indicates Net Employment Outlook of zero.

Wholesale & Retail Trade +12 (9)%

Employers report cautiously optimistic hiring plans for the coming quarter with a Net Employment Outlook of +9%. However, hiring intentions weaken both quarter-over-quarter and year-over-year, declining by four and six percentage points, respectively.



No bar indicates Net Employment Outlook of zero.

Global Employment Outlook

The Manpower Employment Outlook Survey for the second quarter of 2014 is based on interviews with over 65,000 employers in 42 countries and territories. Employers were asked “How do you anticipate total employment at your location to change in the three months to the end of June 2014 as compared to the current quarter?” The quarterly research conducted by ManpowerGroup measures employer hiring plans* in the world’s major labour markets, and a brief overview of their responses follows.

The second-quarter survey indicates that the headwinds encountered in many global labour markets may be moderating amid numerous signs of measured optimism among employers. Staffing levels are expected to increase in 38 of 42 countries and territories – the largest proportion of positive hiring plans since the third quarter of 2008 – with employers in both Ireland and Spain reporting their first positive hiring forecasts since 2008. The strongest hiring plans across the globe are reported by employers in India, Taiwan, New Zealand, Turkey and Costa Rica. Conversely, the weakest – and only negative – second-quarter forecasts are reported by employers in Italy, the Czech Republic and in France where the Outlook slips into negative territory for the second time in the past four quarters.

Outlooks strengthen in 26 of 42 countries and territories in a quarter-over-quarter comparison and weaken in 11. When compared to year-ago forecasts, the hiring pace is expected to be stronger in 28 countries and territories and weaker in 11. And in a comparison with last year at this time, the hiring pace is expected to improve or remain relatively stable in six of the G7 countries.

Looking at the three global regions separately, employers in all 10 countries surveyed in the Americas region expect to grow payrolls during the next three months. When compared with the previous quarter, hiring plans improve in four countries but decline in two. Year-over-year, the Net Employment Outlook is stronger in four countries but weaker in five. Employers in Costa Rica report the region’s most optimistic second-quarter hiring prospects, while for

the third consecutive quarter employers in Argentina report the least optimistic Outlook in the Americas.

Staffing levels are forecast to grow in all eight Asia Pacific countries and territories during the next three months. Stronger Net Employment Outlooks are reported in five countries and territories when compared with the previous quarter, with employers reporting weaker hiring prospects in two. When compared with Quarter 2 2013, hiring plans improve in seven countries and territories, and decline only in China. The strongest labour market is expected in India, while for the eighth consecutive quarter employers in Australia report the region’s weakest hiring prospects.

Employers in 20 of 24 countries in the Europe, Middle East & Africa (EMEA) region forecast workforce growth during the next three months. Hiring prospects improve in 17 countries quarter-over-quarter, but decline in seven. Year-over-year, the Net Employment Outlook is stronger in 17 countries, weaker in five and unchanged in two. As in the previous four quarters, Turkish employers report the most optimistic hiring intentions in the region. The region’s weakest Outlook is reported in Italy, but employers here report their strongest forecast since the third quarter of 2012 with hiring plans expected to improve or remain relatively stable in most industry sectors and regions when compared to both three months ago and last year at this time.

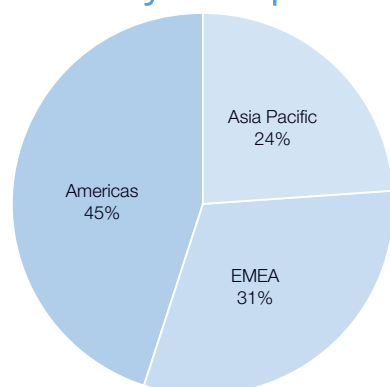
Full survey results for each of the 42 countries and territories included in this quarter’s survey, plus regional and global comparisons, can be found at http://manpowergroup.com/press/meos_landing.cfm.

Additionally, you can examine and compare the latest survey data for all 42 countries and territories with the Manpower Employment Outlook Survey Explorer. The Explorer makes it easy to navigate current hiring trends and historical labour market data. Visit <http://www.manpowergroupsolutions.com/DataExplorer/>.

The next Manpower Employment Outlook Survey will be released on 10 June 2014 to report hiring expectations for the third quarter of 2014.

* Commentary is based on seasonally adjusted data where available.

Survey Respondents by Region



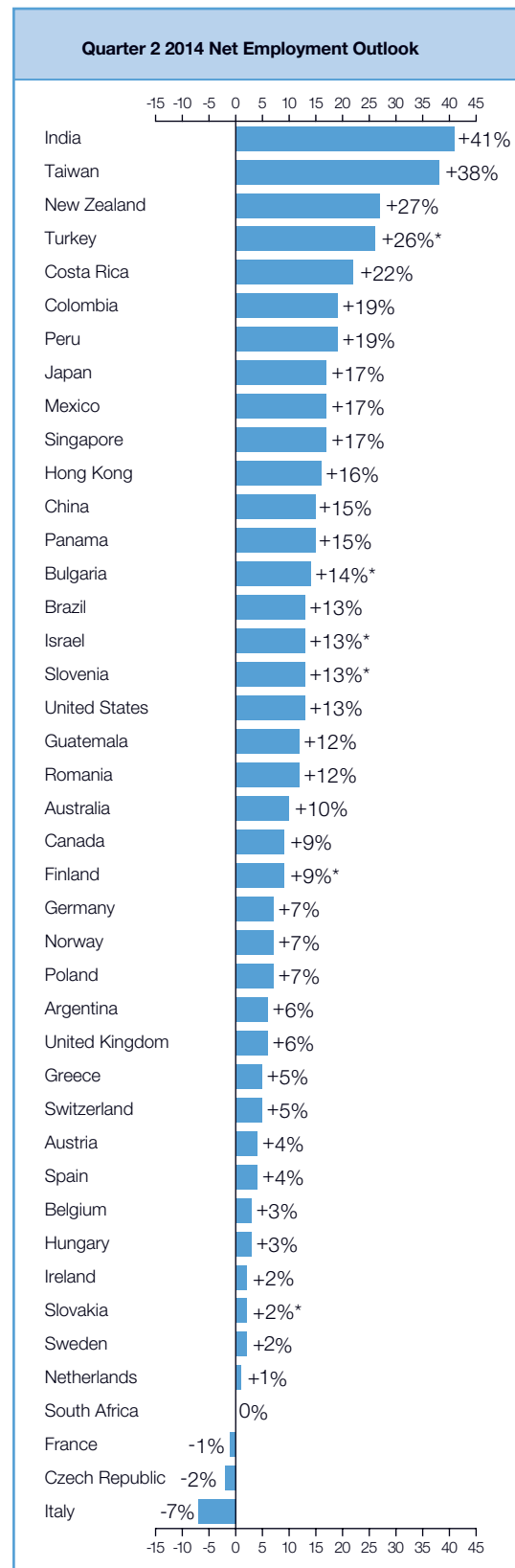
For the Quarter 2 2014 research ManpowerGroup surveyed more than 65,000 human resources directors and senior hiring managers from public and private organisations worldwide: 45% of respondents come from 10 countries in the Americas; 24% from eight countries and territories across Asia Pacific; and 31% from 24 countries in EMEA.

Manpower Employment Outlook Survey Canada

	Quarter 2 2014	Qtr on Qtr Change Q1 2014 to Q2 2014	Yr on Yr Change Q2 2013 to Q2 2014
	%		
Americas			
Argentina	10 (6) ¹	4 (0) ¹	-6 (-6) ¹
Brazil	18 (13) ¹	8 (-3) ¹	-12 (-11) ¹
Canada	12 (9) ¹	7 (-2) ¹	-3 (-3) ¹
Colombia	19 (19) ¹	2 (0) ¹	3 (3) ¹
Costa Rica	19 (22) ¹	4 (10) ¹	6 (11) ¹
Guatemala	11 (12) ¹	-2 (1) ¹	-1 (-1) ¹
Mexico	18 (17) ¹	6 (3) ¹	0 (0) ¹
Panama	13 (15) ¹	-1 (0) ¹	-12 (-7) ¹
Peru	19 (19) ¹	4 (3) ¹	2 (2) ¹
United States	15 (13) ¹	5 (0) ¹	2 (2) ¹
Asia Pacific			
Australia	11 (10) ¹	4 (3) ¹	3 (4) ¹
China	16 (15) ¹	4 (2) ¹	-2 (-2) ¹
Hong Kong	14 (16) ¹	0 (2) ¹	5 (5) ¹
India	45 (41) ¹	16 (8) ¹	15 (14) ¹
Japan	27 (17) ¹	15 (0) ¹	4 (4) ¹
New Zealand	29 (27) ¹	10 (6) ¹	6 (6) ¹
Singapore	18 (17) ¹	2 (-2) ¹	1 (1) ¹
Taiwan	39 (38) ¹	7 (-1) ¹	6 (7) ¹
EMEA[†]			
Austria	6 (4) ¹	6 (-1) ¹	2 (2) ¹
Belgium	4 (3) ¹	5 (3) ¹	5 (6) ¹
Bulgaria	14	13	2
Czech Republic	-1 (-2) ¹	-1 (-5) ¹	-1 (-1) ¹
Finland	9	15	7
France	-1 (-1) ¹	0 (-2) ¹	-1 (-1) ¹
Germany	8 (7) ¹	6 (2) ¹	4 (4) ¹
Greece	8 (5) ¹	7 (1) ¹	11 (11) ¹
Hungary	8 (3) ¹	5 (-1) ¹	3 (2) ¹
Ireland	4 (2) ¹	13 (7) ¹	6 (6) ¹
Israel	13	3	0
Italy	-4 (-7) ¹	8 (3) ¹	6 (5) ¹
Netherlands	1 (1) ¹	2 (1) ¹	6 (4) ¹
Norway	6 (7) ¹	4 (3) ¹	0 (0) ¹
Poland	8 (7) ¹	4 (-1) ¹	8 (8) ¹
Romania	15 (12) ¹	14 (5) ¹	4 (5) ¹
Slovakia	2	4	1
Slovenia	13	11	8
South Africa	0 (0) ¹	-6 (-4) ¹	-2 (-2) ¹
Spain	4 (4) ¹	10 (7) ¹	15 (15) ¹
Sweden	4 (2) ¹	2 (-2) ¹	-2 (-2) ¹
Switzerland	6 (5) ¹	6 (5) ¹	6 (6) ¹
Turkey	26	10	-2
UK	7 (6) ¹	4 (1) ¹	1 (1) ¹

TEMEA – Europe, Middle East and Africa.

1. Number in parentheses is the Net Employment Outlook when adjusted to remove the impact of seasonal variations in hiring activity. Please note that this data is not available for all countries as a minimum of 17 quarters worth of data is required.



* Indicates unadjusted data.

International Comparisons – Americas

Nearly 30,000 employers from 10 countries throughout North, Central and South America were interviewed to measure hiring plans for Quarter 2 2014. Employers in each country report varying degrees of positive hiring activity for the next three months. However, the results are mixed when compared over time. In a quarter-over-quarter comparison, forecasts improve in four countries, decline in two and are unchanged in four. In comparison to Quarter 2 2013, Outlooks improve in four countries, weaken in five and are unchanged in one. Panama's survey results are seasonally adjusted for the first time this quarter.

Opportunities for job seekers are expected to be strongest in Costa Rica where more than one in every four employers surveyed indicate they will add to their payrolls in the April-June time frame. The hiring pace is expected to be particularly active in the Services and the Commerce sectors in response to growing demand from large multinational firms for outsourcing services.

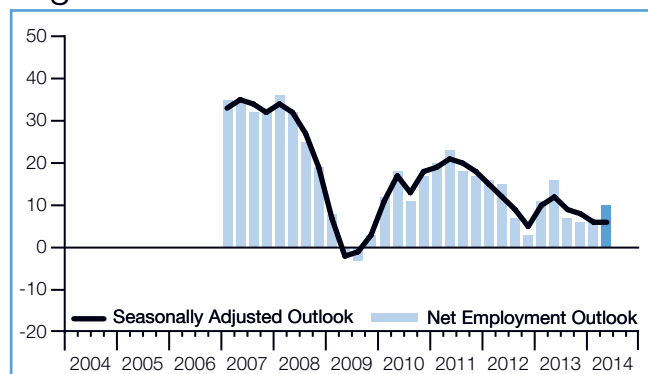
Meanwhile, the hiring pace in Brazil is expected to remain steady, with employers in the Services sector expected to continue hiring in preparation for the World Cup. But Brazil's overall Outlook has gradually declined for 10 consecutive quarters to its weakest level since the survey began here in Quarter 4 2009. Outlooks in Colombia and Peru remain upbeat fuelled by strong forecasts in both the Transportation & Utilities and the Finance, Insurance & Real Estate sectors.

Employers in the United States continue to expect a favourable hiring environment in the months ahead, with the strongest opportunities expected for job seekers in the Leisure & Hospitality sector. The hiring pace is expected to gain traction in Mexico with forecasts improving in most sectors and regions from three months ago. The forecast is particularly strong in the Mining & Extraction sector where the Outlook improves for the fourth consecutive quarter. Employers in the sector expect changes in the government's energy policies will expand opportunities for oil and gas companies and boost both domestic and foreign investment.

Employers in Canada expect some payroll gains in the April-June time frame, but the country's Outlook softens in both quarter-over-quarter and year-over-year comparisons. Hiring intentions remain positive in most industry sectors and all regions. Employers report upbeat hiring plans in the Transportation & Public Utilities sector and in the Construction sector where nearly one out of four employers plan to add to their workforces in the months ahead.

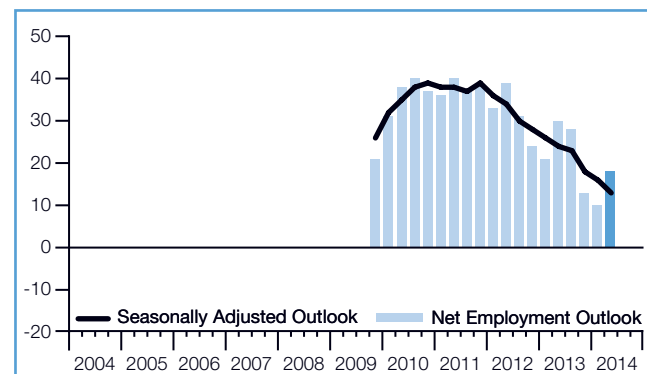
For the third consecutive quarter the region's weakest forecast is reported in Argentina where uncertainty associated with rising inflation and import restrictions continue to drive up prices and wages while minimizing opportunities for job seekers. The diminished employer optimism is compounded by a disappointing forecast in the Manufacturing sector where the Outlook sinks to its weakest level since Argentina's survey was launched in 2007.

Argentina



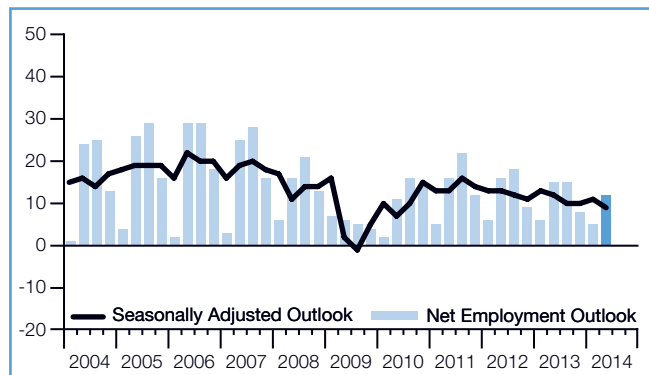
Argentina joined the survey in Q1 2007.

Brazil

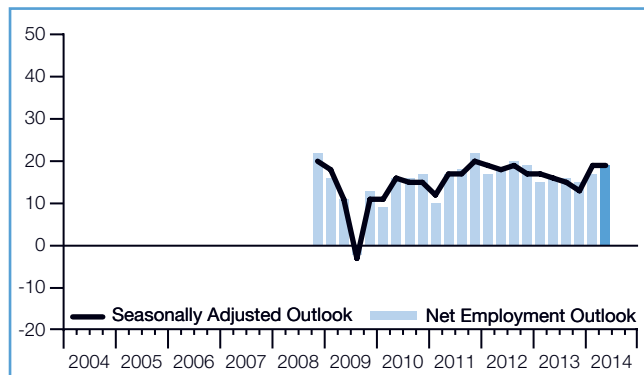


Brazil joined the survey in Q4 2009.

Canada

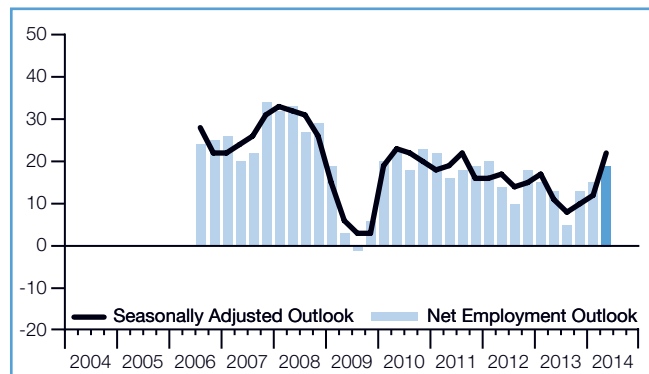


Colombia



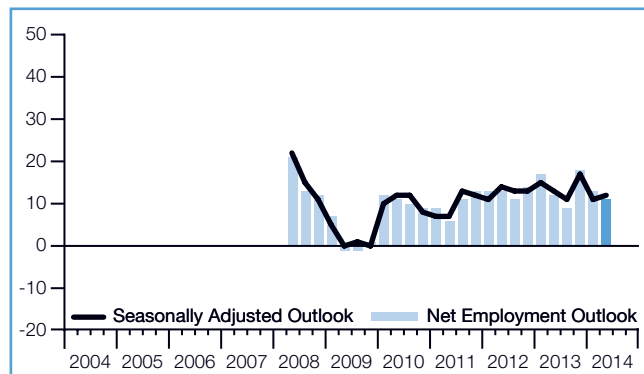
Colombia joined the survey in Q4 2008.

Costa Rica



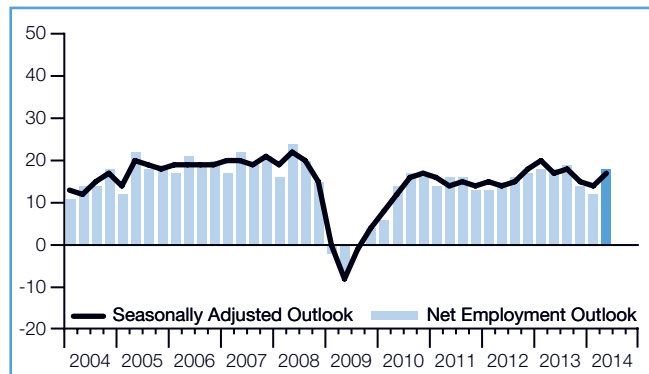
Costa Rica joined the survey in Q3 2006.

Guatemala



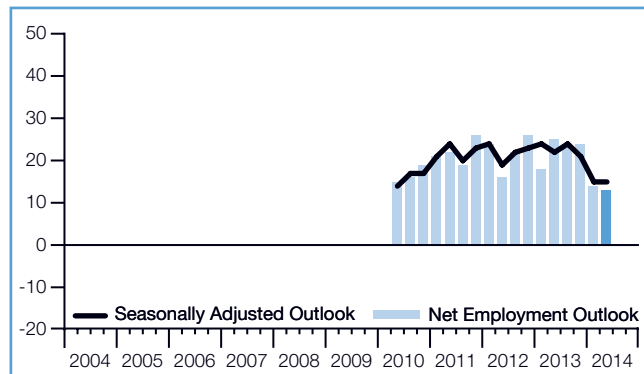
Guatemala joined the survey in Q2 2008.

Mexico



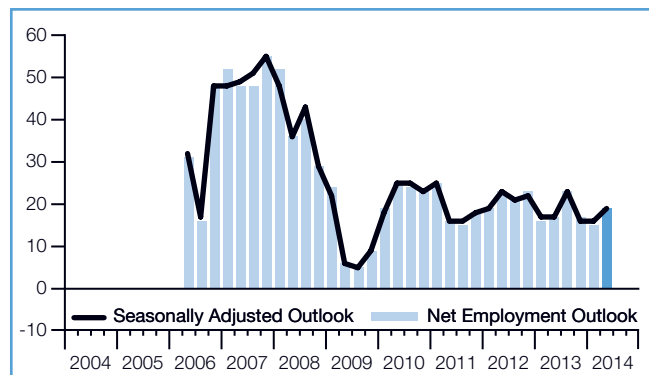
No bar indicates Net Employment Outlook of zero.

Panama



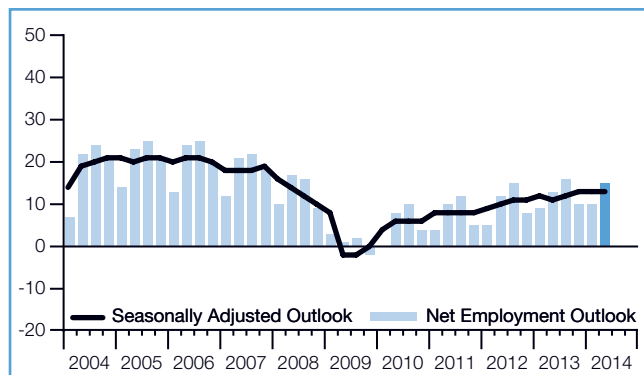
Panama joined the survey in Q2 2010.

Peru



Peru joined the survey in Q2 2006.

USA



No bar indicates Net Employment Outlook of zero.

International Comparisons – Asia Pacific

Over 15,500 employers throughout the Asia Pacific region were interviewed to measure anticipated hiring activity in Quarter 2 2014.

Job prospects remain positive across the region, with employers in India, Taiwan and New Zealand reporting the strongest hiring plans. Outlooks improve in five of the eight countries and territories in a quarter-over-quarter comparison, and strengthen in all countries and territories except China when compared year-over-year.

For the sixth time in the last three years, employers in India report the most optimistic forecast among all 42 countries and territories participating in the survey. Nearly half of the Indian employers surveyed indicate they intend to add to payrolls in the April-June time frame, and hiring plans improve by notable margins in all seven industry sectors and each of the regions in a year-over-year comparison. Competition for talent is expected to be particularly keen among employers in services, financial and IT/ITes firms as an upturn in U.S. outsourcing demand is likely to boost prospects for those with engineering and programming skills.

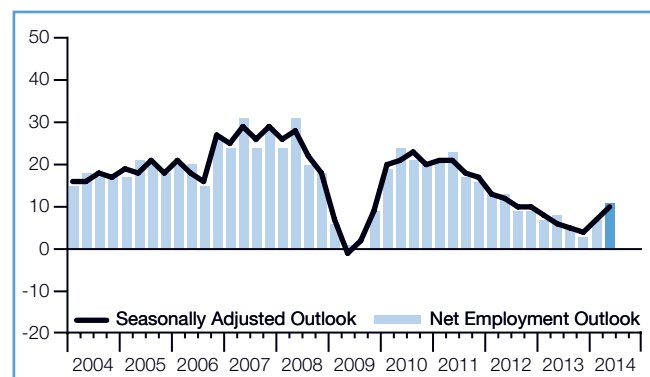
The hiring pace in Taiwan is expected to remain robust despite a drop in demand from mainland China, the largest trading partner of this export-oriented economy. Outlooks strengthen across all industry sectors from last year at this time, with employers in the Mining & Construction sector anticipating the strongest second-quarter hiring pace with a similarly bullish forecast reported in the Finance, Insurance & Real Estate sector.

Japan's employers expect hiring to continue at the strongest pace since Quarter 2 2008. In a year-over-year comparison, the Outlook climbs sharply in the Mining & Construction sector where employers report their most optimistic hiring plans since the survey started in 2003. However, talent shortages continue to frustrate many employers, especially those in small- to medium-size enterprises who often lose out to larger firms and multinationals in the competition for individuals with valued skillsets.

Second-quarter hiring plans improve slightly in China despite signs of weakening domestic demand and uncertainty associated with the country's stated intentions to shift from a manufacturing-driven to a service-driven economy. Hong Kong's second-quarter jobs forecast remains favourable, bolstered in part by considerable improvements in the Finance, Insurance & Real Estate sector as financial institutions continue to aggressively pursue risk & compliance personnel in response to tightened banking regulations.

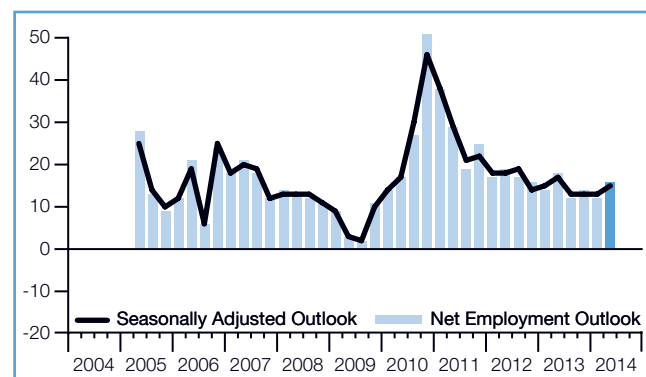
As they have for the previous seven quarters, employers in Australia report the region's weakest hiring plans. However, employer confidence has now grown slightly for the second consecutive quarter and opportunities for job seekers are expected to be the most favourable in the Finance, Insurance & Real Estate and the Transportation & Utilities sectors.

Australia



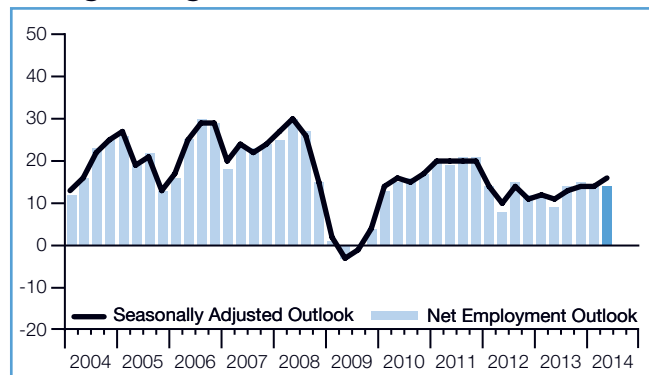
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China



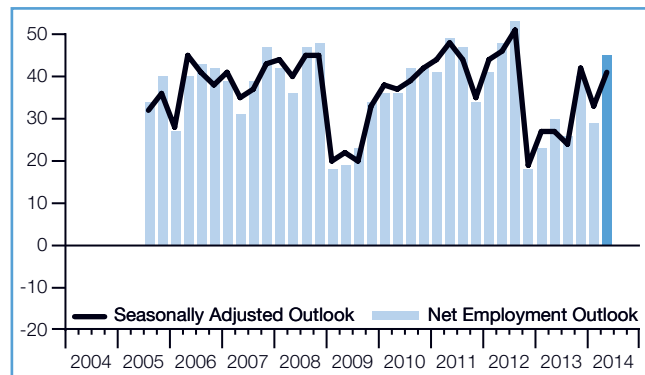
China joined the survey in Q2 2005.

Hong Kong



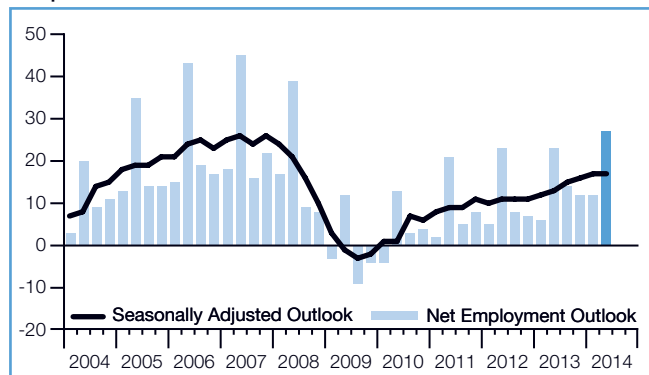
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India

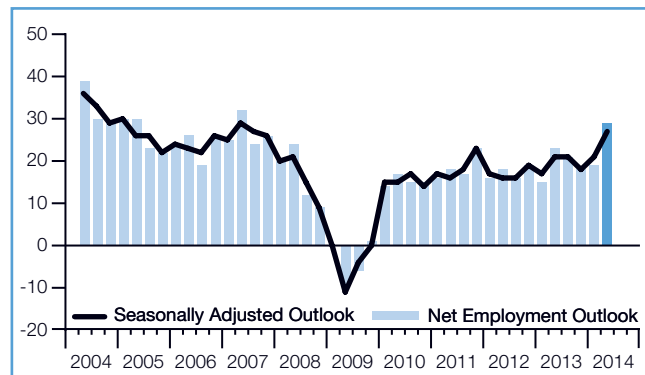


India joined the survey in Q3 2005.

Japan

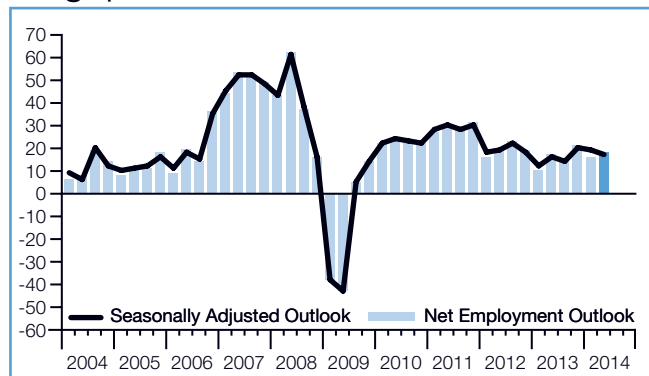


New Zealand

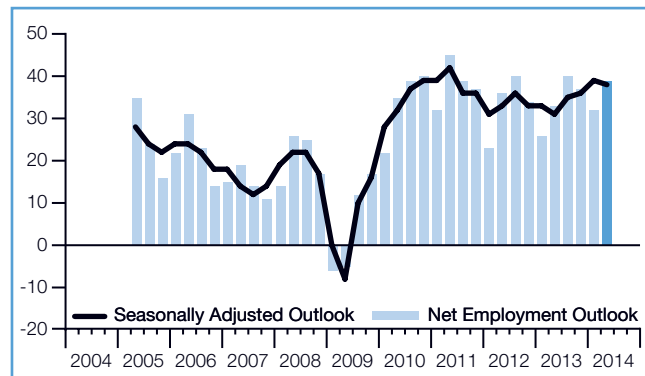


New Zealand joined the survey in Q2 2004.
No bar indicates Net Employment Outlook of zero.

Singapore



Taiwan



Taiwan joined the survey in Q2 2005.

International Comparisons – EMEA

Over 20,000 employer interviews have been conducted across 24 countries in the Europe, Middle East and Africa (EMEA) region to measure anticipated hiring activity for Quarter 2 2014.

The second-quarter survey results don't point to a definitive turnaround in the region, but there are several indications that employer optimism is gradually improving – especially in the handful of countries where hiring plans have remained stubbornly pessimistic in the aftermath of the global recession. Whether the modest upturn is enough to reverse ongoing issues of unemployment and underemployment remains to be seen. However, positive Outlooks are reported by employers in 20 of 24 countries compared to 16 of 24 countries for the first three months of the year, and employers in Ireland and Spain report their first positive Outlooks since 2008. Forecasts improve in 17 of the 24 countries in both quarter-over-quarter and year-over-year comparisons.

Second-quarter hiring plans are strongest in Turkey, Bulgaria, Israel and Slovenia. The weakest – and only negative – forecasts are reported by employers in Italy, the Czech Republic and France.

Turkey's Outlook improves by a considerable margin in comparison to the first-quarter report, propelled by bright hiring prospects in the Manufacturing and Construction industry sectors. The hiring pace in each of Turkey's other nine industry sectors is also expected to be solid as one in every three employers indicate they will add to their workforces in the next three months.

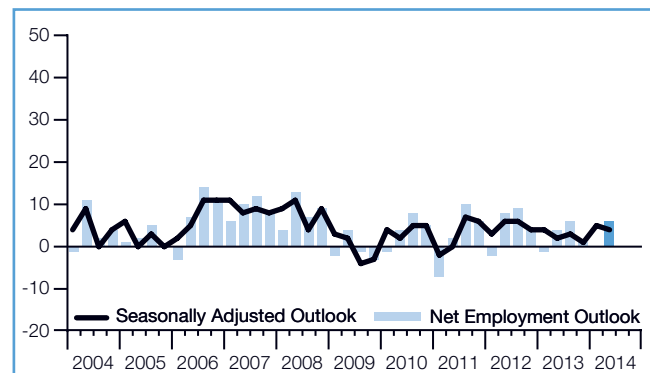
Elsewhere in the region, employer hiring plans remain mixed but there are signs that the labour market is gaining firmer footing. In the United Kingdom, job seekers should continue to benefit from incremental gains in employer optimism. Hiring plans remain upbeat in the Finance & Business Services sector, and a glimmer of promise is seen in the Construction sector where employers report their first positive Outlook since the third quarter of 2008.

Poland's Outlook remains cautiously optimistic. Boosted by an uptick in the production of automobiles and consumer durables, Poland's Manufacturing sector forecast improves for the fifth consecutive quarter with employers expressing a level of confidence not reported since the second quarter of 2011.

Second-quarter hiring activity is expected to remain positive in both Norway and Sweden fuelled by growing momentum in the Finance & Business Services sector forecasts. And confidence among Finnish employers turn positive again following two successive quarters of negative forecasts; the Outlook is strengthened, in part, by sharp improvements in both the Construction and the Transport, Storage & Communications Outlooks.

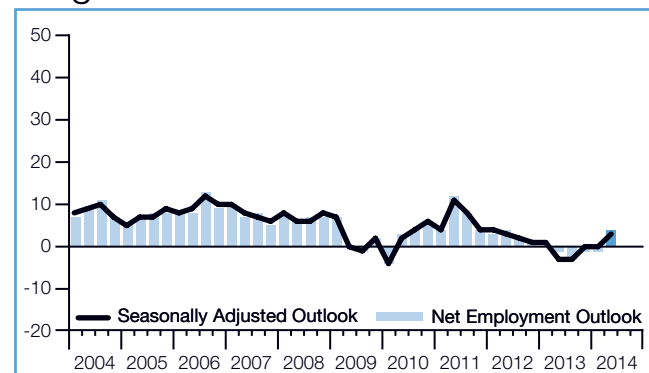
Opportunities for job seekers in Germany remain cautiously optimistic. An active hiring pace is expected in the Finance & Business Services, but this optimism is counterbalanced by an anticipated slowdown in the Manufacturing sector where the Outlook softens to its weakest level in a year and a half. Meanwhile, the forecast in France turns negative despite employers in the Transport, Storage & Communications sector reporting their most optimistic Outlook since the survey started in France in Quarter 3 2003.

Austria



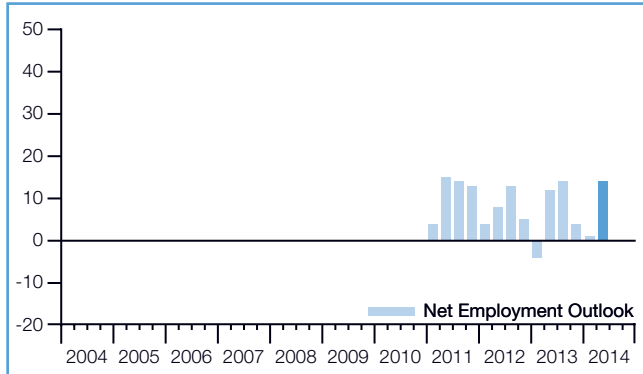
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Belgium



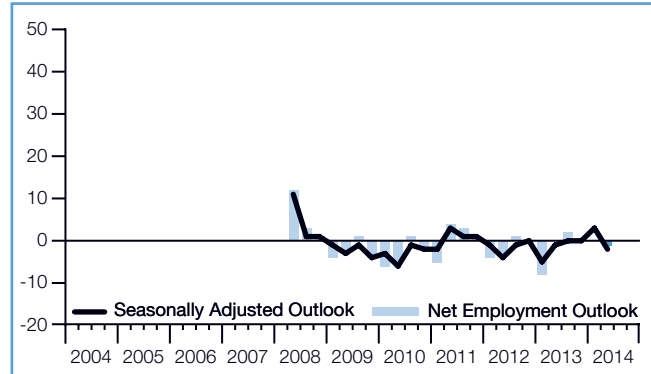
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Bulgaria



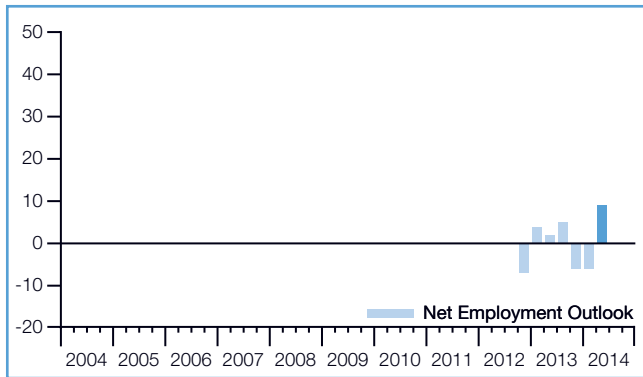
Bulgaria joined the survey in Q1 2011.

Czech Republic



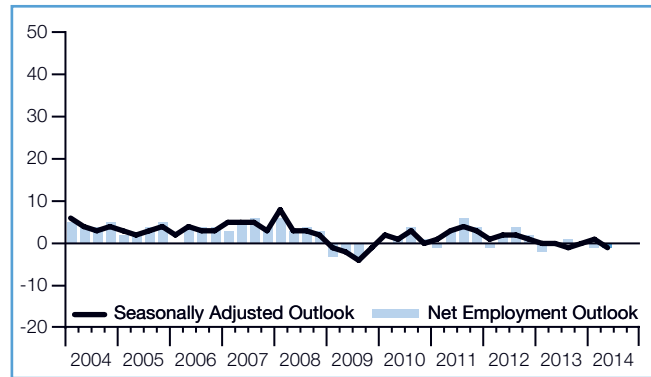
Czech Republic joined the survey in Q2 2008.
No bar indicates Net Employment Outlook of zero.

Finland



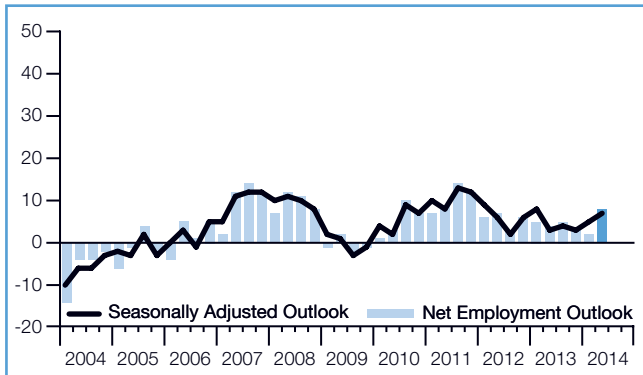
Finland joined the survey in Q4 2012.

France

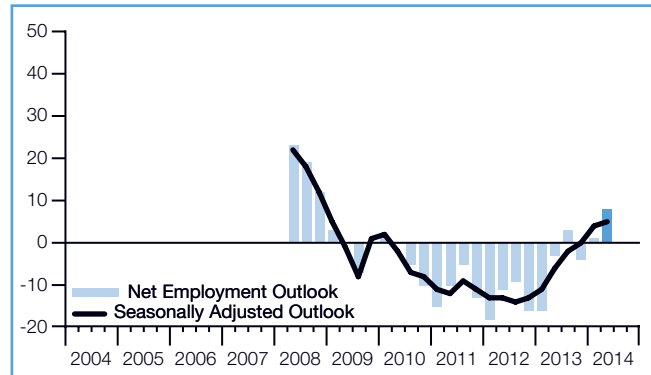


No bar indicates Net Employment Outlook of zero.

Germany

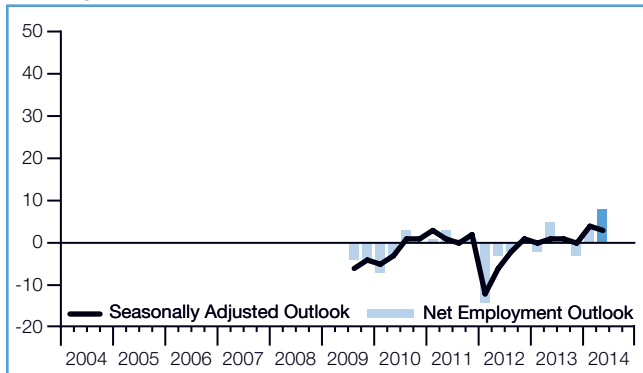


Greece



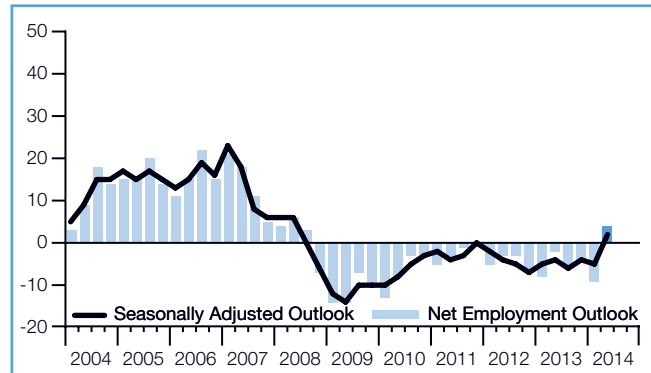
Greece joined the survey in Q2 2008.
No bar indicates Net Employment Outlook of zero.

Hungary



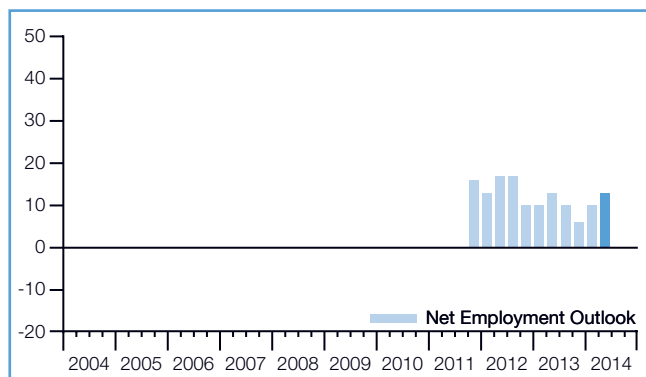
Hungary joined the survey in Q3 2009.
No bar indicates Net Employment Outlook of zero.

Ireland



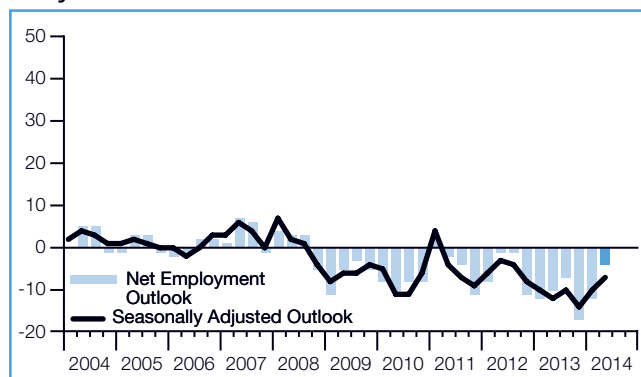
No bar indicates Net Employment Outlook of zero.

Israel



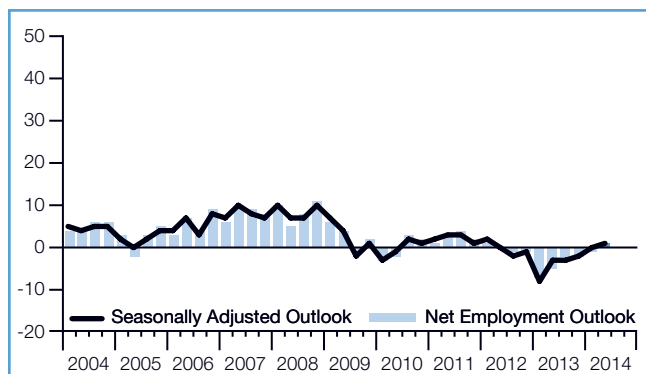
Israel joined the survey in Q4 2011.

Italy



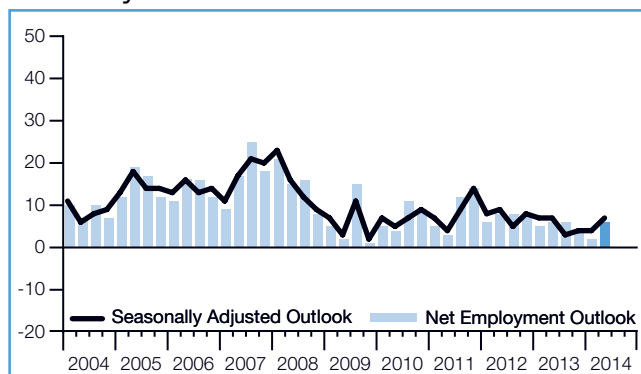
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Netherlands

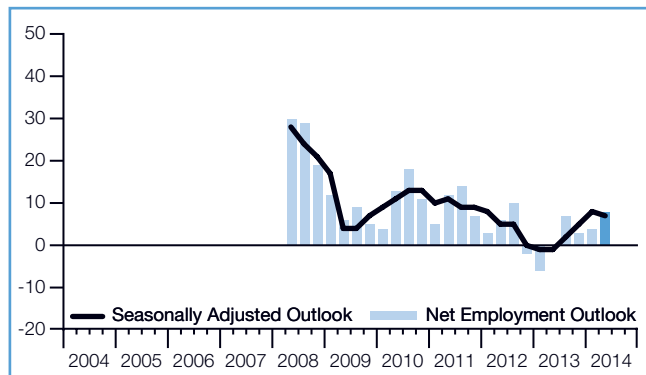


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Norway



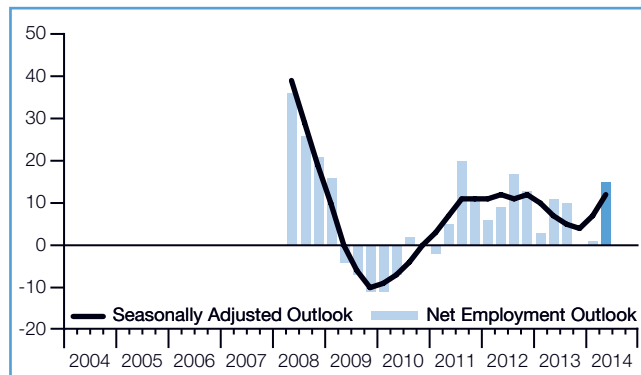
Poland



Poland joined the survey in Q2 2008.

No bar indicates Net Employment Outlook of zero.

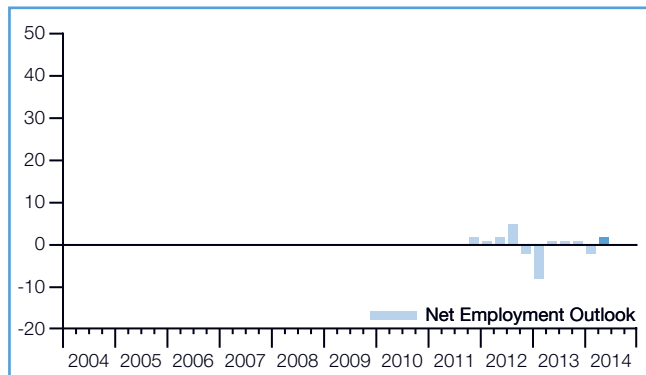
Romania



Romania joined the survey in Q2 2008.

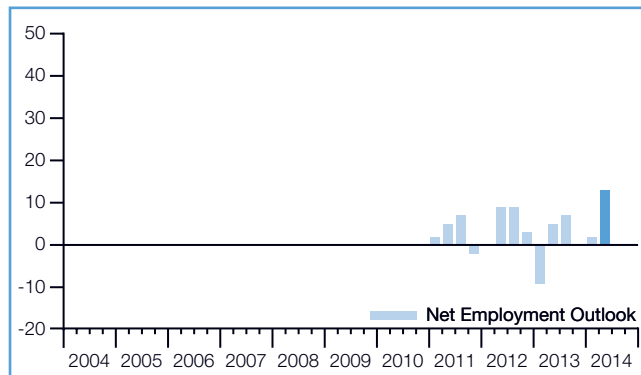
No bar indicates Net Employment Outlook of zero.

Slovakia



Slovakia joined the survey in Q4 2011.

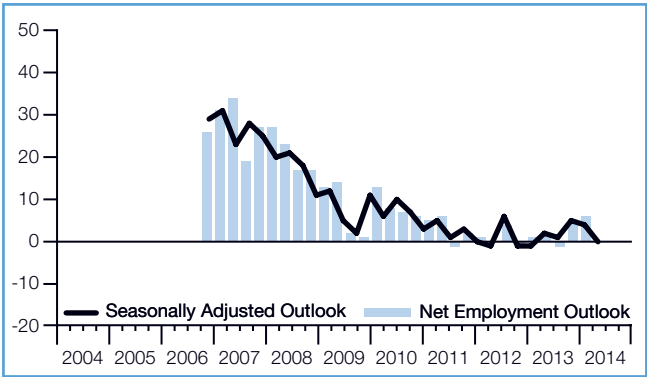
Slovenia



Slovenia joined the survey in Q1 2011.

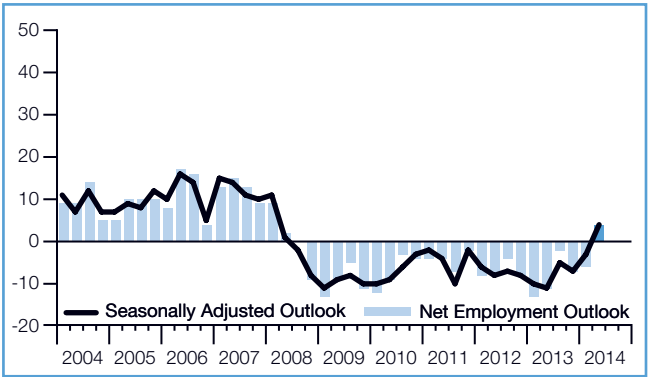
No bar indicates Net Employment Outlook of zero.

South Africa



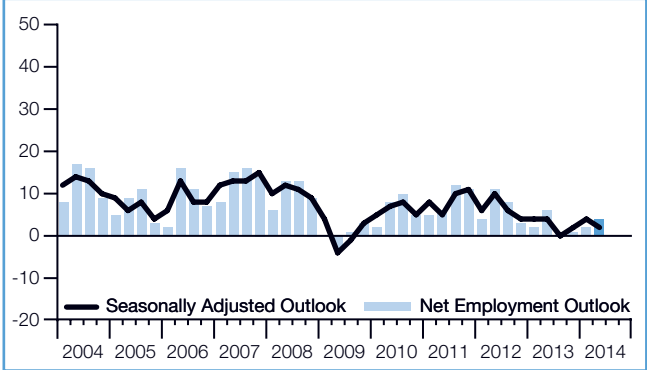
South Africa joined the survey in Q4 2006.
No bar indicates Net Employment Outlook of zero.

Spain



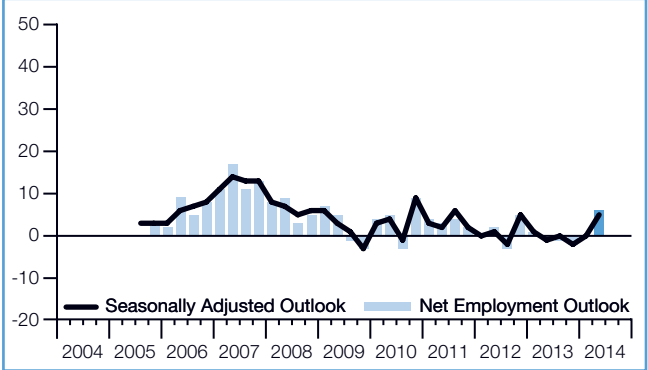
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Sweden



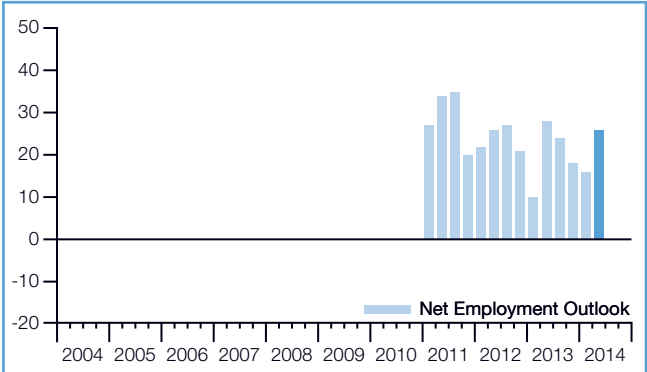
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Switzerland



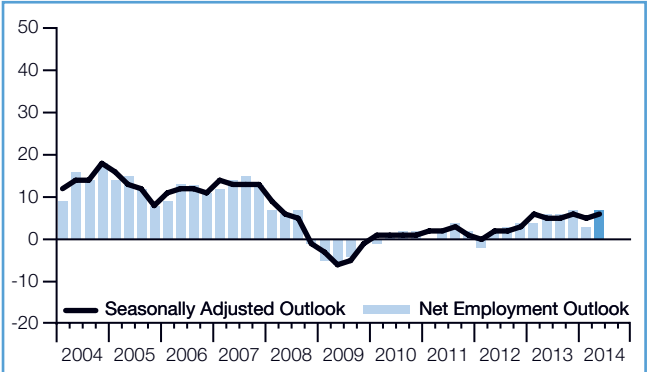
Switzerland joined the survey in Q3 2005.
No bar indicates Net Employment Outlook of zero.

Turkey



Turkey joined the survey in Q1 2011.

UK



No bar indicates Net Employment Outlook of zero.

About the Survey

The Manpower 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 Manpower Employment Outlook Survey:

Unique: It is unparalleled in its size, scope, longevity and area of focus.

Projective: The Manpower 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 65,000 public and private employers across 42 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.

Survey Question

For the Quarter 2 2014 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 June 2014 as compared to the current quarter?"

Methodology

The Manpower Employment Outlook Survey is conducted using a validated methodology, in accordance with the highest standards in market research. The research team for the 42 countries and territories where the survey is currently conducted includes ManpowerGroup's internal research team and Infocorp Ltd. 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%.

The margin of error for the Canadian survey is +/- 2.2%.

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 Adjustment

Seasonal adjustments have been applied to the data for Argentina, Australia, Austria, Belgium, Brazil, Canada, China, Colombia, Costa Rica, the Czech Republic, France, Germany, Greece, Guatemala, Hong Kong, Hungary, India, Ireland, Italy, Japan, Mexico, Netherlands, New Zealand, Norway, Panama, Peru, Poland, Romania, Singapore, South Africa, Spain, Sweden, Switzerland, Taiwan, the United Kingdom and the United States to provide additional insight into the survey data. These adjustments make it possible to review the data without the employment fluctuations that normally occur at the same time each year, thus providing a clearer picture of the data over time. 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.

History of the Survey

- 1962** First generation of the Manpower Employment Outlook Survey launched in the United States and Canada.
- 1966** ManpowerGroup's United Kingdom operation launches the equivalent of the United States survey, naming the report the Quarterly Survey of Employment Prospects. The survey adopts the same forward-looking research format as the United States survey and is the first of its kind in Europe.
- 1976** Second generation of the Manpower Employment Outlook Survey launched in the United States and Canada. Research methodology is updated to evolve with advancements in the field of market research.
- 2002** ManpowerGroup United Kingdom's Quarterly Survey of Employment Prospects is updated to adopt an enhanced research methodology. ManpowerGroup's operations in Mexico and Ireland launch the survey in their respective countries.
- 2003** Third generation of the Manpower Employment Outlook Survey is launched, expanding the program to a total of 18 countries and territories worldwide: Australia, Austria, Belgium, Canada, France, Germany, Hong Kong, Ireland, Italy, Japan, Mexico, Netherlands, Norway, Singapore, Spain, Sweden, the United Kingdom and the United States.
- 2004** ManpowerGroup operations in New Zealand launch the Manpower Employment Outlook Survey.
- 2005** ManpowerGroup operations in China, India, Switzerland and Taiwan launch the Manpower Employment Outlook Survey.
- 2006** ManpowerGroup operations in Costa Rica and Peru join the survey program. Surveys in Australia, Austria, Belgium, France, Germany, Hong Kong, Ireland, Italy, Japan, Mexico, Netherlands, Norway, Singapore, Spain and Sweden add seasonally adjusted data. ManpowerGroup operations in South Africa launch the Manpower Employment Outlook Survey.
- 2007** ManpowerGroup operations in Argentina launch the Manpower Employment Outlook Survey. The survey in New Zealand adds seasonally adjusted data.
- 2008** ManpowerGroup operations in Colombia, the Czech Republic, Greece, Guatemala, Poland and Romania join the survey program. China and Taiwan add seasonally adjusted data in the second quarter. India and Switzerland add seasonally adjusted data in the third quarter.
- 2009** ManpowerGroup operations in Hungary and Brazil launch the Manpower Employment Outlook Survey.
- 2010** ManpowerGroup's Panama operation launches the Manpower Employment Outlook Survey, expanding the program total to 36 countries and territories worldwide. Peru adds seasonally adjusted data in the second quarter. Costa Rica adds seasonally adjusted data in the fourth quarter.
- 2011** Beginning in the first quarter, operations in Bulgaria, Slovenia and Turkey join the Manpower Employment Outlook Survey. Seasonally adjusted data is added in the first quarter for Argentina and South Africa. Israel and Slovakia launch the Manpower Employment Outlook Survey in the fourth quarter.
- 2012** Beginning in the second quarter, ManpowerGroup operations in the Czech Republic, Greece, Guatemala, Poland and Romania initiate reporting of seasonally adjusted data. ManpowerGroup's operation in Finland joins the survey in the fourth quarter. Seasonal variations are also removed from Colombian data for the first time.
- 2013** ManpowerGroup Hungary operation begins reporting seasonally adjusted data in the third quarter and the Brazil operation begins reporting seasonally adjusted data in the fourth quarter.
- 2014** Survey data for Panama is seasonally adjusted for the first time in the second quarter.

About ManpowerGroup™

ManpowerGroup™ (NYSE: MAN) is the world leader in innovative workforce solutions that ensure the talent sustainability of the world's workforce for the good of companies, communities, countries, and individuals themselves. Specialising in solutions that help organisations achieve business agility and workforce flexibility, ManpowerGroup leverages its 65 years of world of work expertise to create the work models, design the people practices and access the talent sources its clients need for the future. From staffing, recruitment, workforce consulting, outsourcing and career management to assessment, training and development, ManpowerGroup delivers the talent to drive the innovation and productivity of organizations in a world where talentism is the dominant economic system. Every day, ManpowerGroup connects more than 630,000 people to work and builds their experience and employability through its relationships with 400,000 clients across 80 countries and territories. ManpowerGroup's suite of solutions is offered through ManpowerGroup™ Solutions, Manpower®, Experis™ and Right Management®. ManpowerGroup was named one of the World's Most Ethical Companies for the third consecutive year in 2013, confirming our position as the most trusted brand in the industry.

About Manpower Canada

With nearly 40 offices strategically located across the country, Manpower Canada's staffing services include administrative, industrial, skilled trades and contact centre personnel as well as the assignment of contract professionals in information technology, scientific, finance, engineering, telecommunications and other professional areas under the Experis brand. More information can be found on the following websites, manpower.ca and experis.ca

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www.manpower.ca

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