

Q4 / 2013

Manpower  
Employment  
Outlook Survey  
United States

A Manpower Research Report



Manpower®

# Q4/13

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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.

# United States Employment Outlook

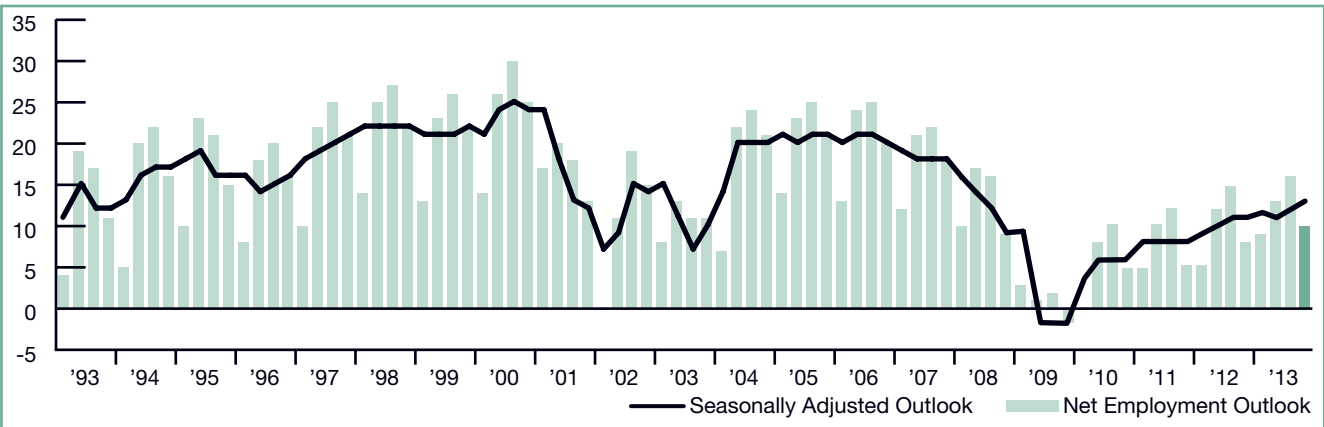
More than 18,000 interviews have been conducted with employers within the United States, including all 50 states, the top 100 Metropolitan Statistical Areas (MSAs), the District of Columbia and Puerto Rico, to measure hiring intentions between October and December 2013. The mix of industries within the 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 December 2013 as compared to the current quarter?”

Among U.S. employers surveyed, 18 percent expect to add to their workforces, and 8 percent expect a decline in their payrolls during Quarter 4 2013. Seventy-two percent of employers anticipate making no change to staff levels, and the remaining 2 percent of employers are undecided about their Quarter 4 2013 hiring plans.

When seasonal variations are removed from the data, the Net Employment Outlook is +13%. Survey results suggest that employers expect hiring intentions to remain relatively stable during Quarter 4 2013 compared to Quarter 3 2013 and to slightly increase compared to one year ago at this time. U.S. employers have now conveyed a positive Outlook for 16 straight quarters.

All four U.S. regions surveyed report a positive Net Employment Outlook. When seasonal variations are removed from the data, employers in the West region report the strongest Outlook at +14%. Quarter-over-quarter, employers in the Northeast expect a slight increase in hiring, while plans to add workers remain consistent among employers in the Midwest, South and West. Compared to one year ago at this time, employers in the Northeast and West project a slight increase in hiring for Quarter 4 2013, and employers in the Midwest and South expect a relatively stable hiring environment.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
<b>Quarter 4 2013</b>	<b>18</b>	<b>8</b>	<b>72</b>	<b>2</b>	<b>10</b>	<b>13</b>
Quarter 3 2013	22	6	70	2	16	12
Quarter 2 2013	18	5	73	4	13	11
Quarter 1 2013	17	8	72	3	9	12
Quarter 4 2012	17	9	72	2	8	11



No bar indicates Net Employment Outlook of zero. Revised methodology effective Quarter 1 2009.

## Industry Sector Comparisons

For Quarter 4 2013, employers have a positive Outlook in all 13 industry sectors included in the survey: Wholesale & Retail Trade (+22%), Leisure & Hospitality (+17%), Professional & Business Services (+13%), Transportation & Utilities (+11%), Information (+11%), Financial Activities (+10%), Mining (+9%), Education & Health Services (+9%), Durable Goods Manufacturing (+8%), Nondurable Goods Manufacturing (+7%), Construction (+5%), Government (+4%) and Other Services (+2%).

When the industry sector data is compared quarter-over-quarter, employers in the Wholesale & Retail Trade and Education & Health Services sectors anticipate a slight

hiring increase, while employers in the Information sector expect the hiring pace to remain relatively stable.

The hiring pace is expected to moderately decrease in seven industry sectors: Durable Goods Manufacturing, Nondurable Goods Manufacturing, Transportation & Utilities, Financial Activities, Professional & Business Services, Other Services and Government.

A considerable decline in hiring is anticipated in the Mining, Construction and Leisure & Hospitality sectors.

Results for the Mining sector are reported only in the national survey data to ensure statistical accuracy.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2013	Net Employment Outlook Q3 2013
	%	%	%	%	%	%
Construction	16	11	70	3	5	18
Education & Health Services	15	6	77	2	9	6
Financial Activities	14	4	81	1	10	15
Government	13	9	76	2	4	9
Information	16	5	78	1	11	12
Leisure & Hospitality	28	11	59	2	17	30
Manufacturing - Durable Goods	16	8	74	2	8	13
Manufacturing - Nondurable Goods	16	9	73	2	7	14
Mining	19	10	68	3	9	18
Other Services	11	9	79	1	2	10
Professional & Business Services	20	7	72	1	13	18
Transportation & Utilities	19	8	71	2	11	17
Wholesale & Retail Trade	27	5	67	1	22	20

## Regional Comparisons

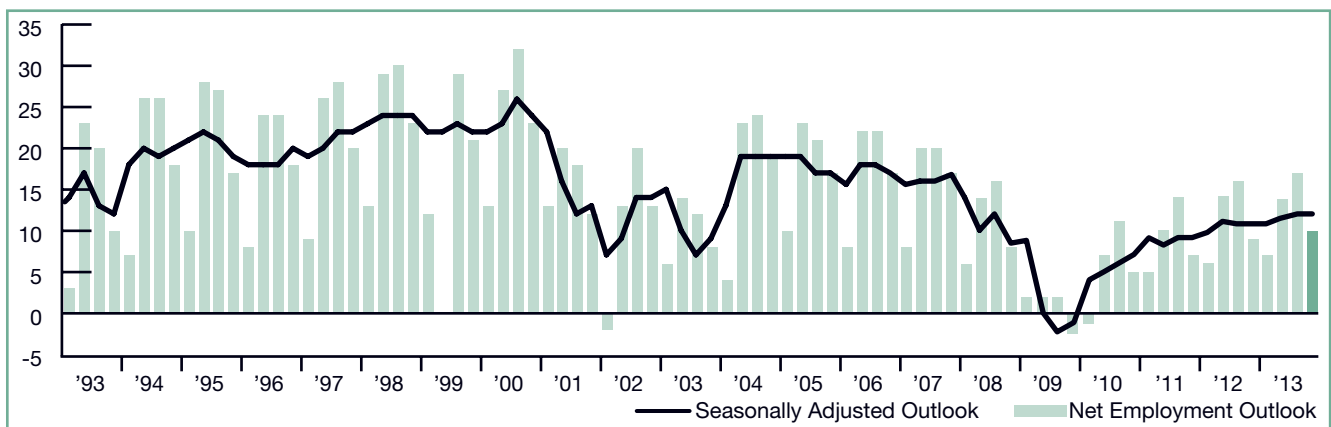
### Midwest Seasonally Adjusted Net Employment Outlook: +12%

In the Midwest, 18 percent of employers surveyed expect to increase staff levels for Quarter 4 2013 and 8 percent anticipate reduced headcounts, leading to a Net Employment Outlook of +10%. When seasonal variations are removed from the data, the Outlook for Quarter 4 2013 is similar to Quarter 3 2013 and to one year ago at this time.

Among Midwest employers, hiring plans are stronger or relatively stable for Quarter 4 2013 compared to Quarter 3 2013 across 3 of the industries surveyed. A moderate increase is anticipated among employers in the Education & Health Services sector, while

employers in the Wholesale & Retail Trade and Information sectors look for the hiring pace to remain relatively stable. Durable Goods Manufacturing and Financial Activities employers expect the hiring pace to slightly decline, and employers in the Nondurable Goods Manufacturing and Professional & Business Services sectors anticipate a moderate decline in the quarter-over-quarter hiring pace. A considerable decrease in the hiring pace is expected by employers in the Construction, Transportation & Utilities, Leisure & Hospitality, Other Services and Government sectors.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2013	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries - Midwest</b>	<b>18</b>	<b>8</b>	<b>73</b>	<b>1</b>	<b>10</b>	<b>12</b>
Construction	15	12	68	5	3	-
Education & Health Services	15	8	75	2	7	-
Financial Activities	14	2	83	1	12	-
Government	10	10	78	2	0	-
Information	14	4	82	0	10	-
Leisure & Hospitality	30	12	57	1	18	-
Manufacturing - Durable Goods	21	9	69	1	12	-
Manufacturing - Nondurable Goods	16	8	74	2	8	-
Other Services	8	11	81	0	-3	-
Professional & Business Services	18	6	75	1	12	-
Transportation & Utilities	17	7	75	1	10	-
Wholesale & Retail Trade	29	6	65	0	23	-



No bar indicates Net Employment Outlook of zero. Revised methodology effective Quarter 1 2009.

The Midwest Region comprises the following states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries is not currently available.

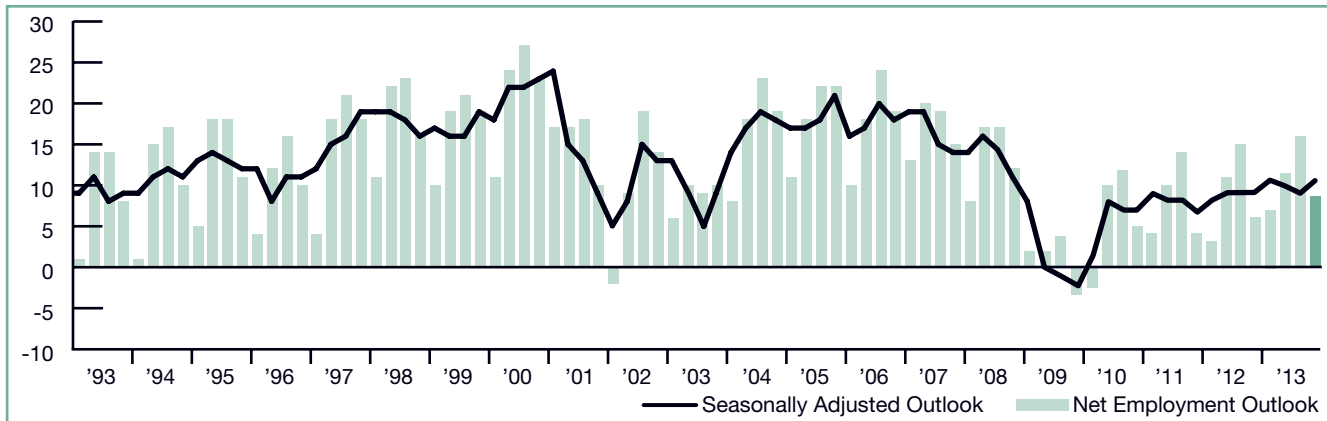
## Northeast Seasonally Adjusted Net Employment Outlook: +11%

In the Northeast, 17 percent of employers indicate plans to increase staff levels, while 9 percent expect to decrease payrolls, resulting in a Net Employment Outlook of +8% for Quarter 4 2013. According to seasonally adjusted survey results, employers anticipate a slight increase in hiring compared to Quarter 3 2013 and one year ago at this time.

Compared to Quarter 3 2013 survey results for the Northeast, employers in the Education & Health Services sector expect a moderate increase in the hiring pace for Quarter 4 2013, while employers in the Transportation &

Utilities and Information sectors look for the hiring pace to remain relatively stable. Employers in two industry sectors report a slight decrease in hiring intentions for October – December 2013 compared to July – September 2013: Professional & Business Services and Government. Durable and Nondurable Goods Manufacturing, Wholesale & Retail Trade and Financial Activities employers expect a moderate decrease in hiring, while Construction, Leisure & Hospitality and Other Services employers foresee a considerable decline in the hiring pace quarter-over-quarter.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2013	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – Northeast</b>	<b>17</b>	<b>9</b>	<b>72</b>	<b>2</b>	<b>8</b>	<b>11</b>
Construction	15	13	70	2	2	–
Education & Health Services	15	7	77	1	8	–
Financial Activities	13	5	80	2	8	–
Government	13	9	76	2	4	–
Information	14	5	81	0	9	–
Leisure & Hospitality	22	14	62	2	8	–
Manufacturing - Durable Goods	14	9	75	2	5	–
Manufacturing - Nondurable Goods	12	11	76	1	1	–
Other Services	10	11	78	1	-1	–
Professional & Business Services	21	5	72	2	16	–
Transportation & Utilities	22	7	70	1	15	–
Wholesale & Retail Trade	26	5	67	2	21	–



Revised methodology effective Quarter 1 2009.

The Northeast Region comprises the following states: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries is not currently available.

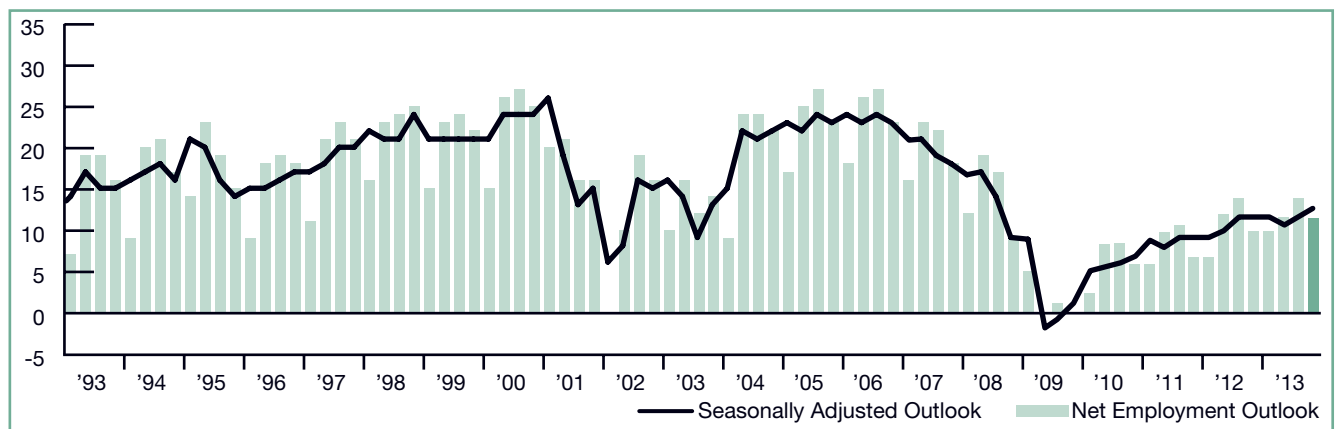
## South Seasonally Adjusted Net Employment Outlook: +13%

In the South, 19 percent of employers surveyed expect to increase staff levels and 7 percent plan to decrease their employee headcounts, resulting in a Net Employment Outlook of +12%. When seasonal variations are removed from the data, the expected Quarter 4 2013 hiring pace is relatively stable from Quarter 3 2013 and Quarter 4 2012.

Quarter-over-quarter, employers in the Wholesale & Retail Trade sector anticipate a moderate increase in

hiring plans, while employers in the Education & Health Services sector report a slight increase in hiring expectations. Employers in four industry sectors report slightly declining hiring expectations in Quarter 4 2013: Financial Activities, Professional & Business Services, Other Services and Government. Construction, Durable and Nondurable Goods Manufacturing, Transportation & Utilities, Information and Leisure & Hospitality employers anticipate a moderate decrease in hiring pace.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2013	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries - South</b>	<b>19</b>	<b>7</b>	<b>72</b>	<b>2</b>	<b>12</b>	<b>13</b>
Construction	15	10	72	3	5	-
Education & Health Services	15	4	77	4	11	-
Financial Activities	14	4	80	2	10	-
Government	13	7	78	2	6	-
Information	16	7	74	3	9	-
Leisure & Hospitality	30	10	58	2	20	-
Manufacturing - Durable Goods	15	6	76	3	9	-
Manufacturing - Nondurable Goods	15	8	77	0	7	-
Other Services	12	8	79	1	4	-
Professional & Business Services	21	7	71	1	14	-
Transportation & Utilities	18	9	69	4	9	-
Wholesale & Retail Trade	26	5	67	2	21	-



No bar indicates Net Employment Outlook of zero. Revised methodology effective Quarter 1 2009.

The South Region comprises Puerto Rico and the following states: Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries is not currently available.

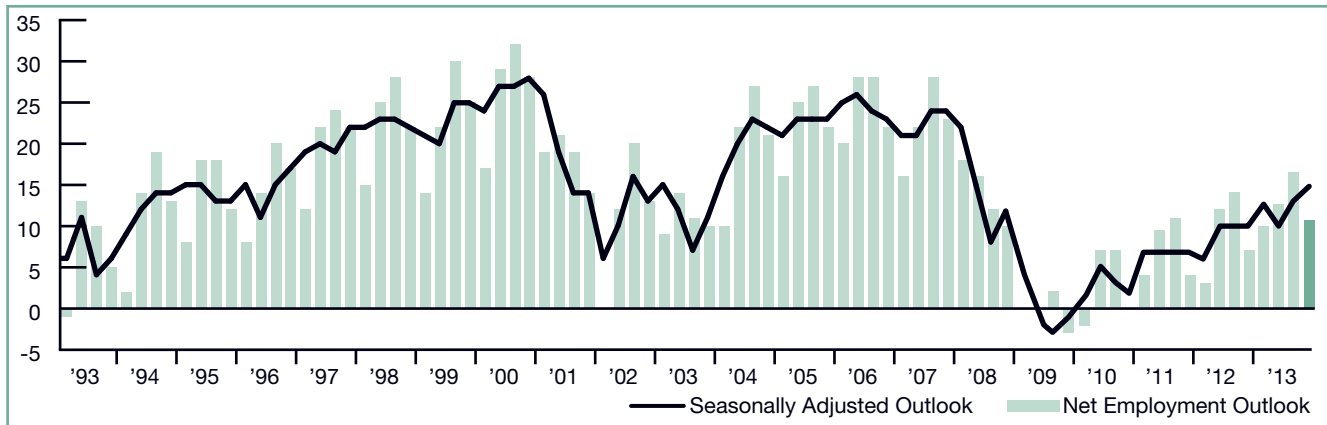
### West Seasonally Adjusted Net Employment Outlook: +14%

Among employers surveyed in the West, 19 percent plan to add staff, while 8 percent anticipate a decline in payrolls, resulting in a Net Employment Outlook of +11% for Quarter 4 2013. According to seasonally adjusted survey results, employers in the West anticipate hiring to remain relatively stable compared to Quarter 3 2013, and increase slightly compared to one year ago at this time.

Employers in the Information sector expect hiring plans to remain relatively stable. Durable Goods Manufacturing,

Wholesale & Retail Trade, Education & Health Services and Other Services employers report a slightly declining Net Employment Outlook. Employers in five sectors anticipate a moderate decrease in hiring expectations: Nondurable Goods Manufacturing, Transportation & Utilities, Financial Activities, Professional & Business Services and Government. Construction and Leisure & Hospitality employers expect hiring plans to considerably decrease.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook Q4 2013	Seasonally Adjusted
	%	%	%	%	%	%
<b>All Industries – West</b>	<b>19</b>	<b>8</b>	<b>71</b>	<b>2</b>	<b>11</b>	<b>14</b>
Construction	17	10	69	4	7	–
Education & Health Services	13	6	79	2	7	–
Financial Activities	14	4	81	1	10	–
Government	15	11	70	4	4	–
Information	19	5	74	2	14	–
Leisure & Hospitality	27	11	61	1	16	–
Manufacturing - Durable Goods	15	8	77	0	7	–
Manufacturing - Nondurable Goods	21	12	64	3	9	–
Other Services	15	7	78	0	8	–
Professional & Business Services	18	9	71	2	9	–
Transportation & Utilities	20	8	70	2	12	–
Wholesale & Retail Trade	26	5	67	2	21	–



No bar indicates Net Employment Outlook of zero. Revised methodology effective Quarter 1 2009.

The West Region comprises the following states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming. Because the industry sector reporting method has been changed effective Quarter 1 2009, seasonally adjusted data for individual industries is not currently available.



# Global Employment Outlook

Over 65,000 hiring managers across 42 countries and territories were recently asked, “How do you anticipate total employment at your location to change in the three months to the end of December 2013 as compared to the current quarter?”

Based on employer responses, general labor market conditions are expected to remain mostly positive, with employers in 29 of the 42 countries and territories reporting that they plan to boost payrolls by varying degrees during the fourth quarter. Worldwide, hiring expectations are strongest in India, Taiwan, Panama, Singapore and Brazil. The weakest opportunities for job seekers are expected in Italy, Spain and Finland.

When compared with forecasts from the prior quarter and last year at this time, the fourth-quarter research reveals few signs that global hiring momentum will improve by any notable degree. In fact, hiring prospects are stronger in only 14 of 42 countries and territories when compared with the prior quarter, weaken in 19 and are unchanged in nine. Outlooks are stronger in 16 countries and territories when compared to 4Q 2012, but hiring plans actually weaken in 25 and are unchanged in one. Overall, it appears that employers are carefully considering their options, and many are evidently prepared to adopt a wait-and-see attitude toward further hiring until they see clearer resolution to ongoing uncertainty in the marketplace.

One notable exception is in India where fourth-quarter hiring plans are the most optimistic across the globe. In fact, India’s hiring pace is expected to rebound decisively following four consecutive quarters of relatively lackluster forecasts. Elsewhere in the Asia Pacific region, payrolls are

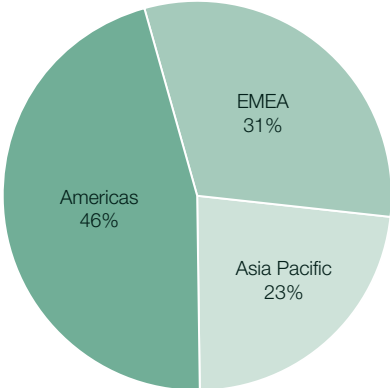
expected to grow in each of the eight countries and territories. Net Employment Outlooks strengthen in three countries and territories in quarter-over-quarter comparisons, and weaken in two. Year-over-year, hiring plans improve in five, but weaken in three. The region’s weakest Outlook for the last three months of the year is reported by Australian employers.

In the Europe, Middle East & Africa (EMEA) region, overall hiring intentions are just nominally weaker than in the prior quarter. Employers forecast jobs gains in 11 of 24 countries in the fourth quarter, compared to 14 positive forecasts reported three months ago. Payroll cuts, on the other hand, are expected in 10 countries—the same as in 3Q 2013. Hiring plans improve in eight countries when compared to the prior quarter but weaken in 13. Year-over-year, the forecasts are stronger in eight countries but weaker in 15. Turkish employers report the region’s strongest hiring plans, while the weakest Outlook is reported in Italy. Employers remain cautiously optimistic in the United Kingdom with Outlooks improving in most industry sectors in comparison to both the prior quarter and last year at this time.

Hiring plans in the Americas remain positive in each of the 10 countries participating in the research. When compared with the previous quarter, forecasts improve in three countries, weaken in four and are unchanged in three. The forecasts trend marginally weaker in a year-over-year comparison, with Outlooks also improving in three countries but declining in seven. Employers in Panama forecast the region’s strongest fourth-quarter hiring pace while those in Argentina report the least optimistic hiring plans. Following four years of steady improvement, the Outlook in the United States is the most optimistic reported since 2Q 2008. The hiring pace in Brazil is expected to remain respectable through the end of the year despite a considerable decline in the Outlook year-over-year. Meanwhile, hiring activity is expected to continue at a steady pace in both Mexico and Canada.

\* Commentary is based on seasonally adjusted data where available.

## Survey Respondents by Region



For the Quarter 4 2013 research ManpowerGroup surveyed more than 65,000 human resources directors and senior hiring managers from public and private organizations worldwide: 46% of respondents come from 10 countries in the Americas; 23% from eight countries and territories across Asia Pacific; and 31% from 24 countries in EMEA.

## 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 4 2013 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 December 2013 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%.

**Regions:** The survey reports results by the four regions within the U.S. as determined by the U.S. Census Bureau. Each region is represented with a minimum error factor of +/- 1.4% based on a 90% confidence level.

**Industries:** The survey reports national results by the NAICS Supersectors. Error factors not to exceed +/- 5% for Mining and +/- 3% for the remaining Supersectors based on a 90% confidence level.

## 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, Colombia, Costa Rica, China, the Czech Republic, France, Germany, Greece, Guatemala, Hong Kong, Hungary, India, Ireland, Italy, Japan, Mexico, Netherlands, New Zealand, Norway, 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.

## 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).

## 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 in the third quarter. ManpowerGroup operations in South Africa launch the Manpower Employment Outlook Survey.
- 2007 ManpowerGroup operations in Argentina join the Manpower Employment Outlook Survey. The survey in New Zealand adds seasonally adjusted data in the first quarter.
- 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 begins reporting seasonally adjusted data in the third quarter and the Brazil operation begins reporting seasonally adjusted data in the fourth quarter.

## About Manpower Group™

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. Specializing in solutions that help organizations 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.

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