

Memo

Date: June 8, 2016
 To: Express Employment Professionals
 From: Harris Poll/Nielsen Consumer Insights (f/k/a Harris Interactive)
 Subject: Survey of Unemployed Americans

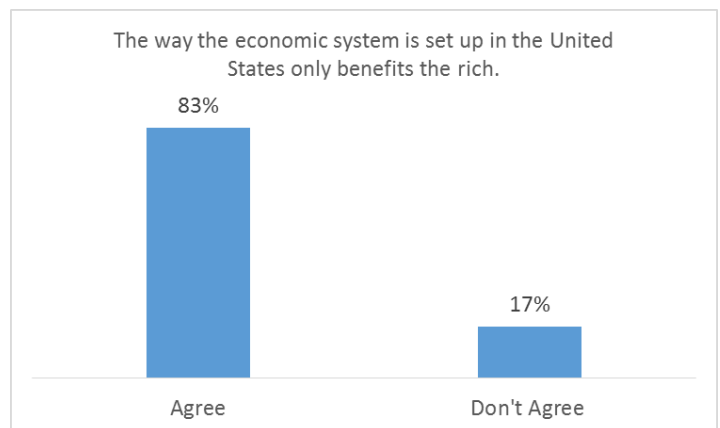
This study was conducted online by Harris Poll on behalf of Express Employment Professionals and included 1,513 U.S. adults aged 18 or older who are unemployed but capable of working (whether or not they receive unemployment compensation benefits). Excluded are those who are currently retired, choose to stay at home or are unable to work due to long-term disability. The survey was conducted between May 5 and May 17, 2016.

Results were weighted as needed for age by gender, education, race/ethnicity, region and household income. Propensity score weighting was also used to adjust for respondents' propensity to be online. Totals may not equal the sum of their individual components due to rounding. No estimates of theoretical sampling error can be calculated; a full methodology is available upon request.

Economic factors and their impact on job seekers

Unemployed Americans appear to be uneasy about the direction the U.S. is taking with more than 6 in 10 (63%) feeling the economy is going in the wrong direction. These feelings of uneasiness are fueling perceptions of the unemployed that the U.S. economic system is not designed to benefit them: Eighty-three percent agree with the statement “The way the economic system is set up in the United States only benefits the rich.”

This wave of research revealed an increase in those who say they quit their job (22%, up from 15% in 2014 and 19% in 2015) compared to those who say they were laid off (23%, down from 28% in 2015 and 36% in 2014). Many still feel their unemployment is their own fault (48%), while the economy receives less blame for ones' unemployment situation (34% vs. 37% in 2015 and 45% in 2014).



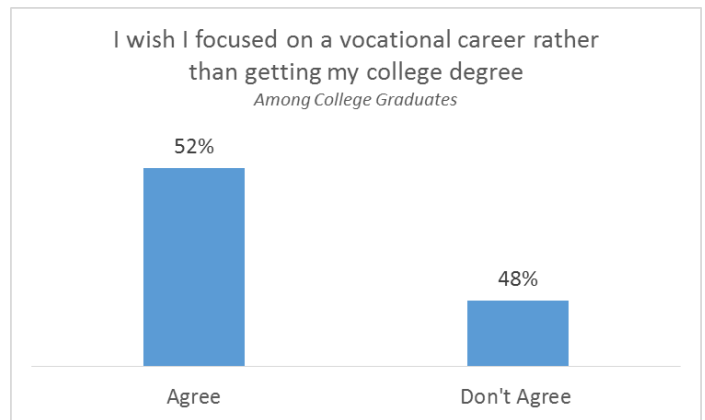
Who are the unemployed? Demographics and Attitudes

The majority of the unemployed are under the age of 40 - with 33% age 18-29 and 20% age 30-39. And, there are more men (55%) than women (45%). Additionally, there are a significant number (44%) who have a High School degree or less.

Among those who attended college, fifty-two percent agree with the statement “I wish I focused on a vocational career (e.g., automotive technology, electrician, plumber, HVAC specialist, dental assistant, medical assisting, etc.) rather than getting my college degree.”

The study consistently finds that unemployed Americans simultaneously embody both feelings of desperation and hope about their current employment situation. Hope is evident in the fact that most are:

- Confident everything will turn out fine (86%)
- Hopeful that they’ll find a job they really want in the next six months (87%)
- Hopeful they’ll find a job in their field (76%);
- Hopeful they’ll find a job for the pay they want (77%)
- 1 in 5 have turned down job offers

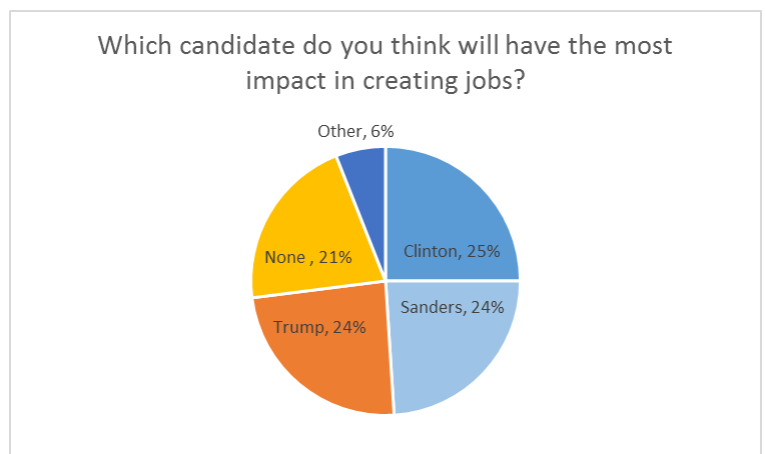


However, their feelings of despair and embarrassment are also readily apparent:

- 2 in 5 (43%) say they have completely given up looking for a job - particularly those out of a job for more than 2 years (59%)
- 8 in 10 are becoming discouraged the longer they are out of work and find it hard to keep their effort level up in looking for a job (87% and 88%, respectively among those out of work for 7-12 months)
- Three-quarters are becoming insecure about their ability to find a job the longer they’re out of work (85% among those out of work 7-12 months), being out of work makes them feel like they don’t know what they’re doing with their life and feel like people are judging them because they’re still out of work
- 7 in 10 are angry about being out of work and being out of work makes them feel desperate (85% and 77%, respectively among those out of work for 7-12 months)

Election and Key issues

Twenty-one percent of the unemployed feel that none of the presidential candidates will have an impact on creating jobs. Of the presidential candidates who were still in the race during the study, the unemployed were split on their impact on job creation: one-quarter of the unemployed felt that Hillary Clinton (25%) would have the biggest impact, similarly, 24% thought Bernie Sanders would have the biggest impact and 24% gave credit to Donald Trump to have the most impact in creating jobs – which closely mirrors the percentages of the unemployed who



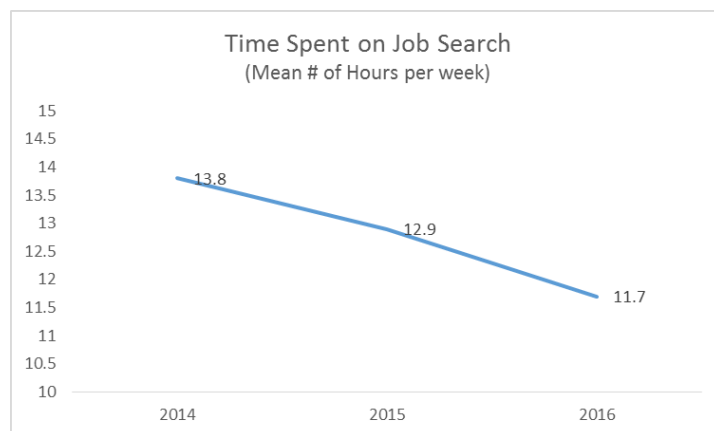
would vote for each candidate – (Hillary Clinton (27%), Bernie Sanders (26%) and Donald Trump (24%).

Regarding recent debates about the minimum wage, only one-in-five believe raising the minimum wage would actually increase jobs (52% believe it would reduce the number of jobs available).

Currently, two-thirds of the unemployed say they do not apply to minimum wage jobs because they don't think they'll pay the bills. And even if the minimum wage was increased to \$15, less than half (48%) say they would be extremely/very likely to apply to a minimum wage job.

Activities of the Unemployed

While feelings of hope are high for many, they have been decreasing slightly over time, which may be impacting the job search. The overall hours dedicated to the search appear to be creeping downward consistently over time. The unemployed are putting in just over a full workday (11.7 hours) per week looking for work but that is down from a high of 13.8 hours in 2014 and 12.9 hours last year. Of the time that is spent, researching job opportunities and filling out applications are still the most prevalent activities.



Barriers to Employment

And while 8 in 10 (84%) report being willing to take almost any job to help pay the bills, less than two-thirds (63%) say they have applied for jobs below their previous job level. In addition, willingness to move city or town is down to less than half (49%) compared to 52% in 2015, while willingness to move out of state remains flat with 2015 at 35%. In addition, 3 in 10 plan to or have gone back to school to become more marketable, however, this too is down from a study high in 2014 of 36%.

The unemployed cite being out of work too long (34%), that their experience doesn't match hiring requirements (33%), no available jobs (30%), being too old (30%), not having relevant experience (27%) and that their experience is too narrow/not transferable (26%) as the biggest hurdles to finding that next job.