

global report

Randstad Workmonitor wave 4, 2014

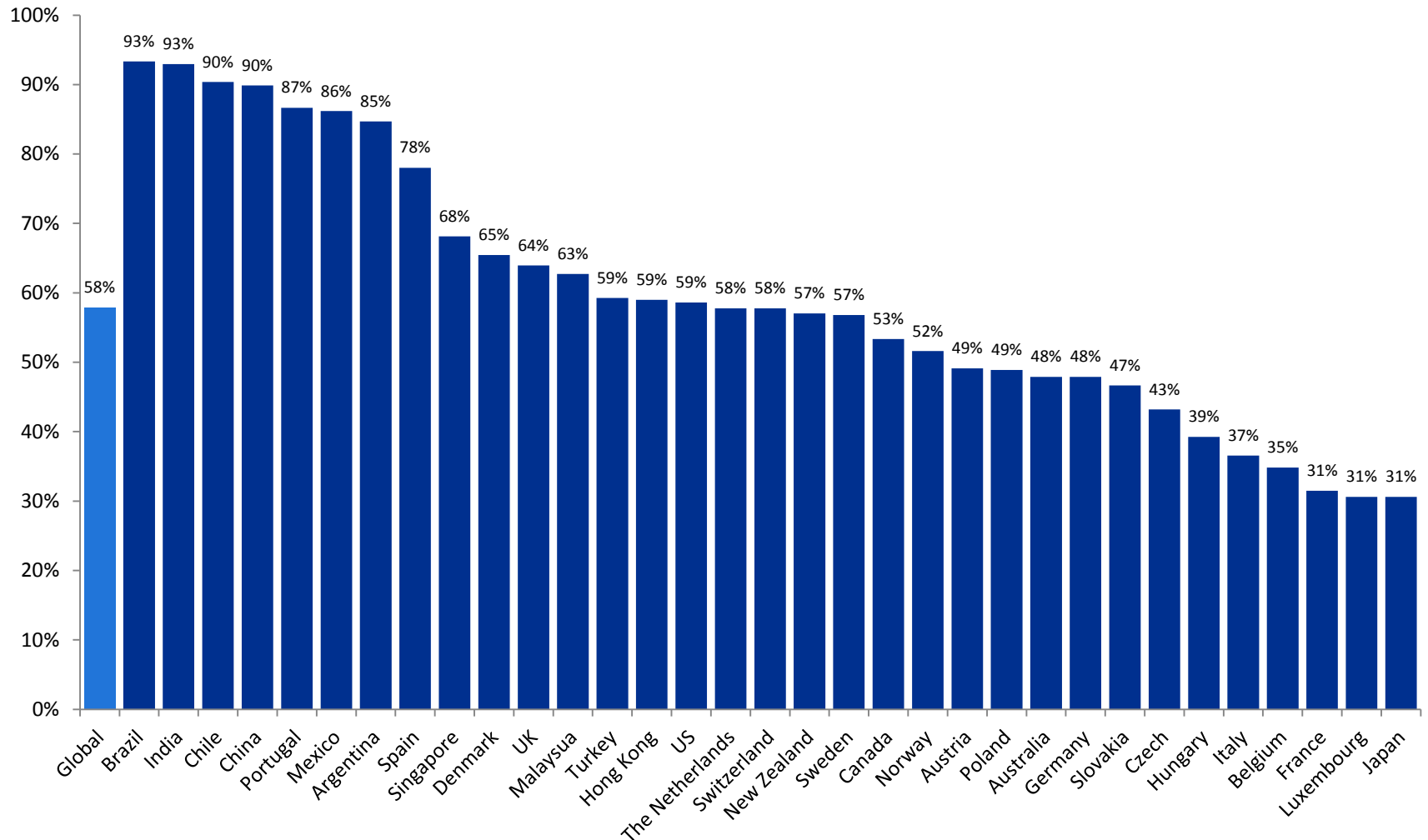
incl. quarterly mobility, job change and job satisfaction

Group communications
Randstad Holding nv
December 2014

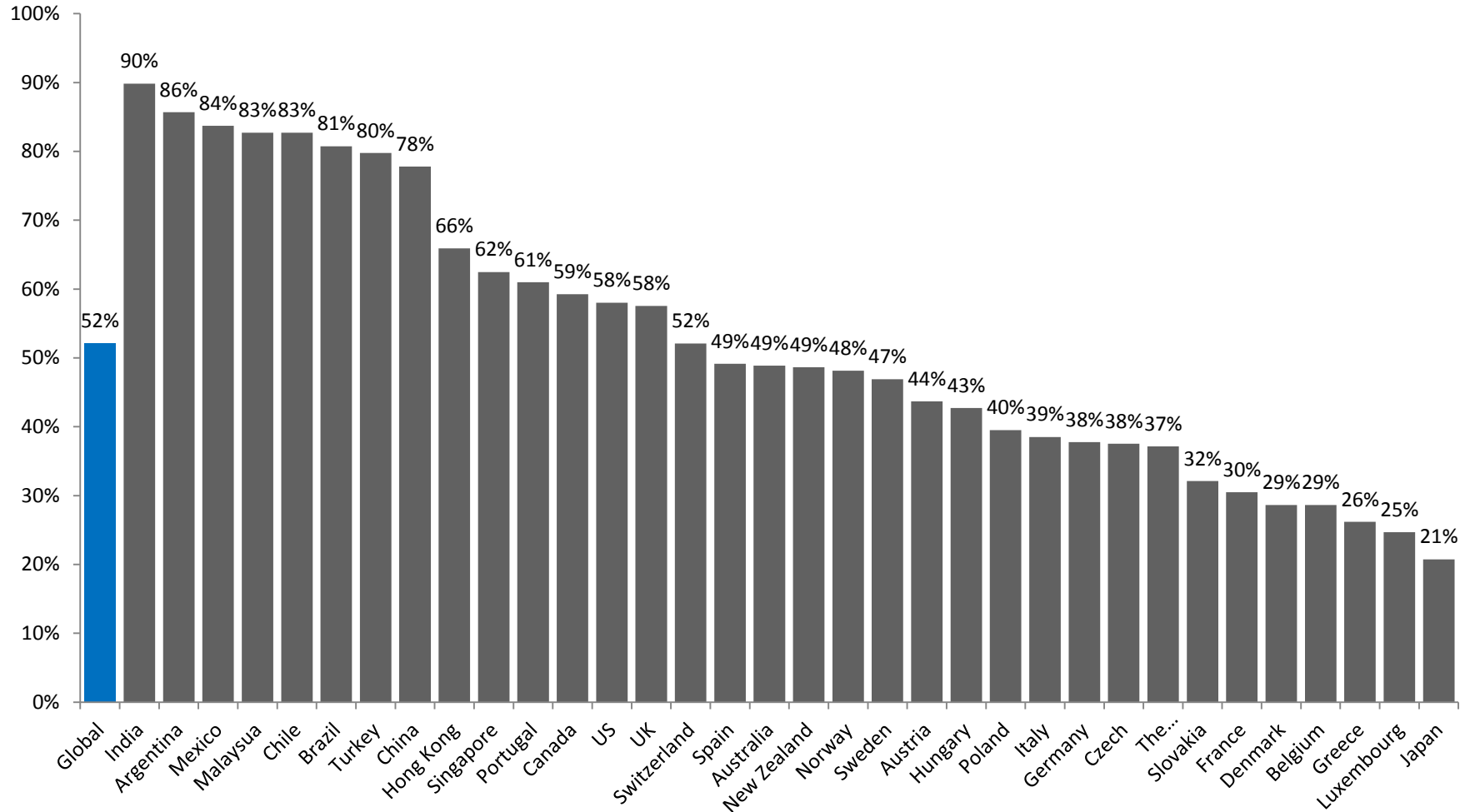


2015 EMPLOYEE OUTLOOK, EMPLOYABILITY & GEN Z

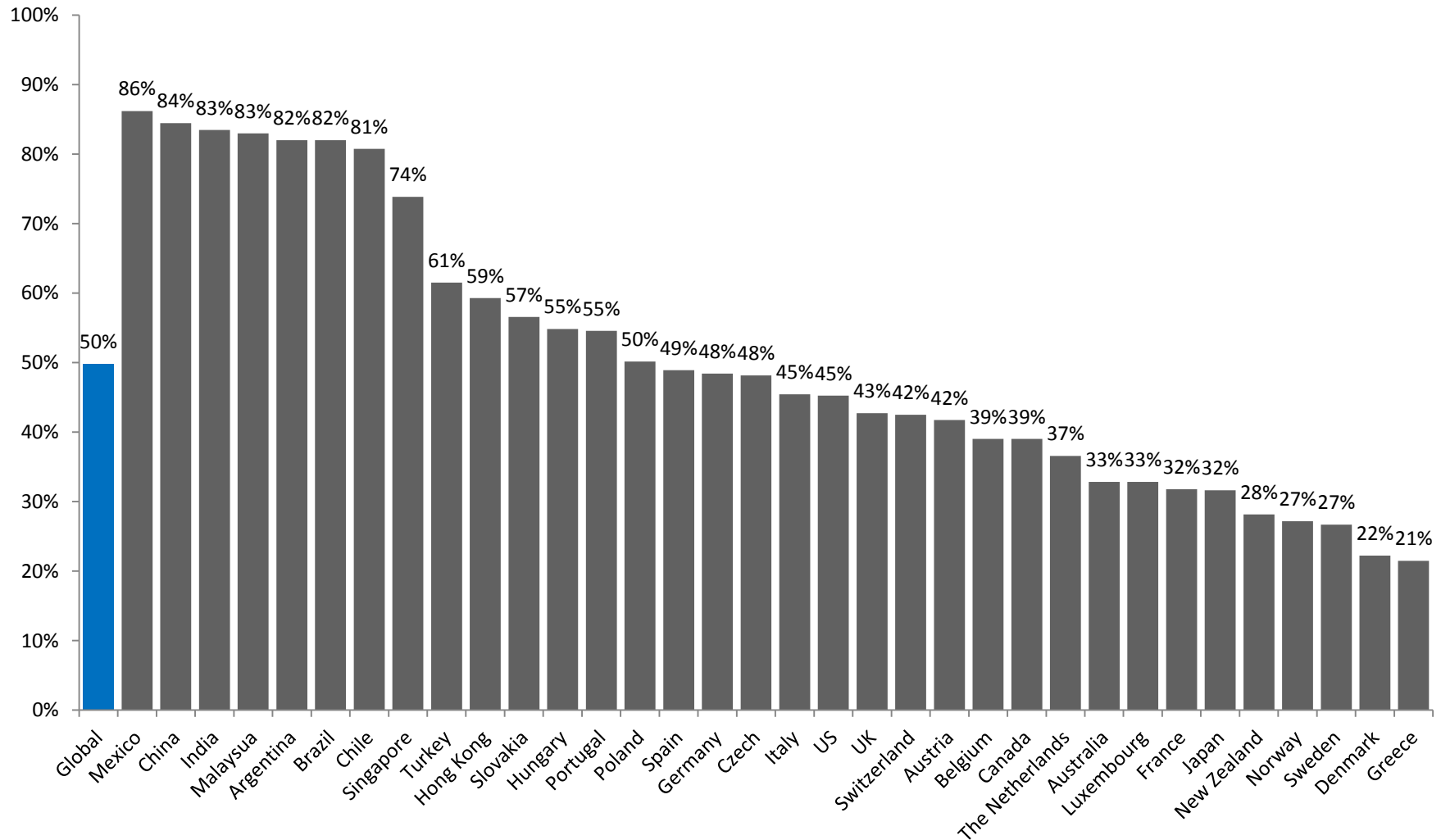
58% expects the economic situation in their country to improve in 2015



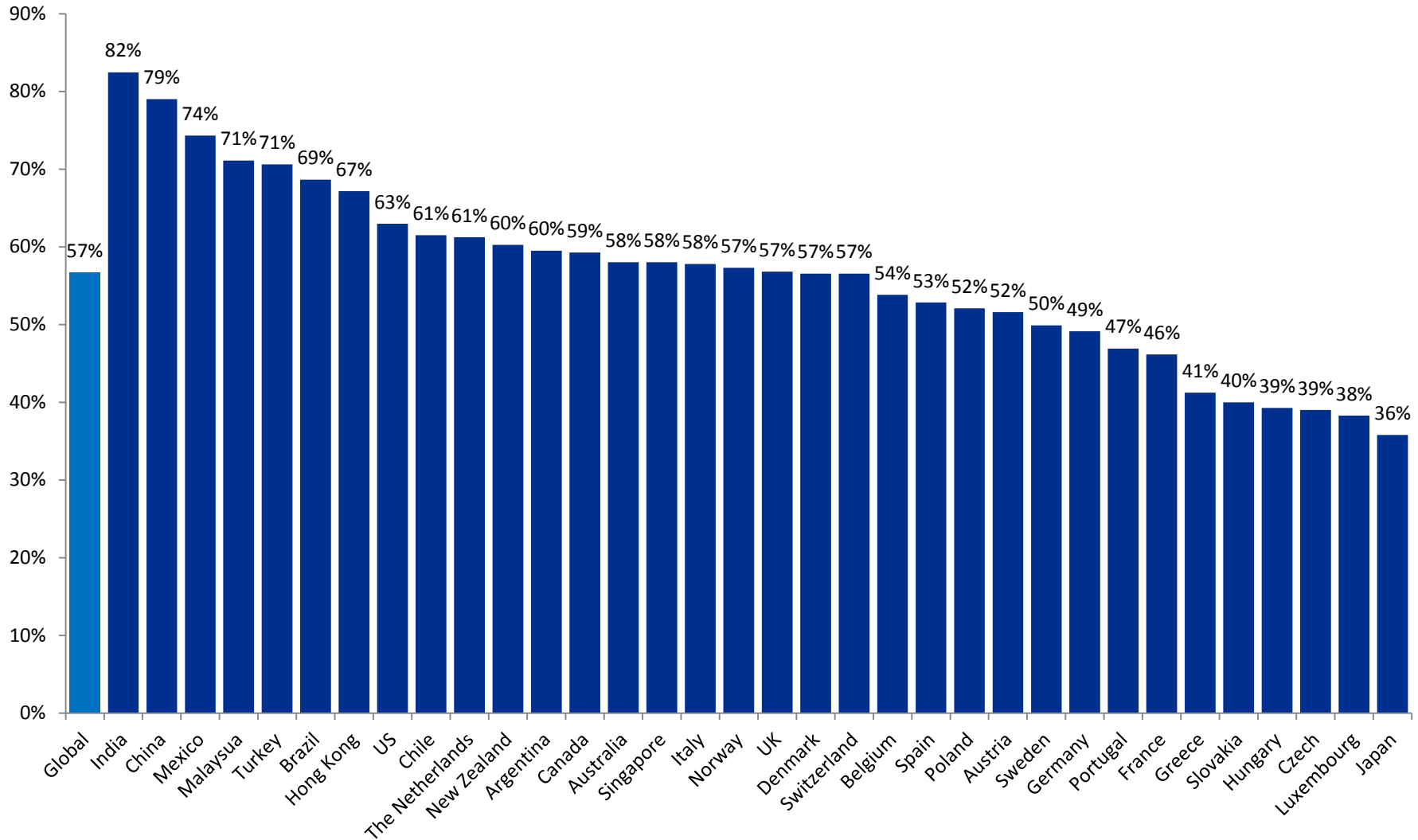
52% expects to receive a raise at the end of this year



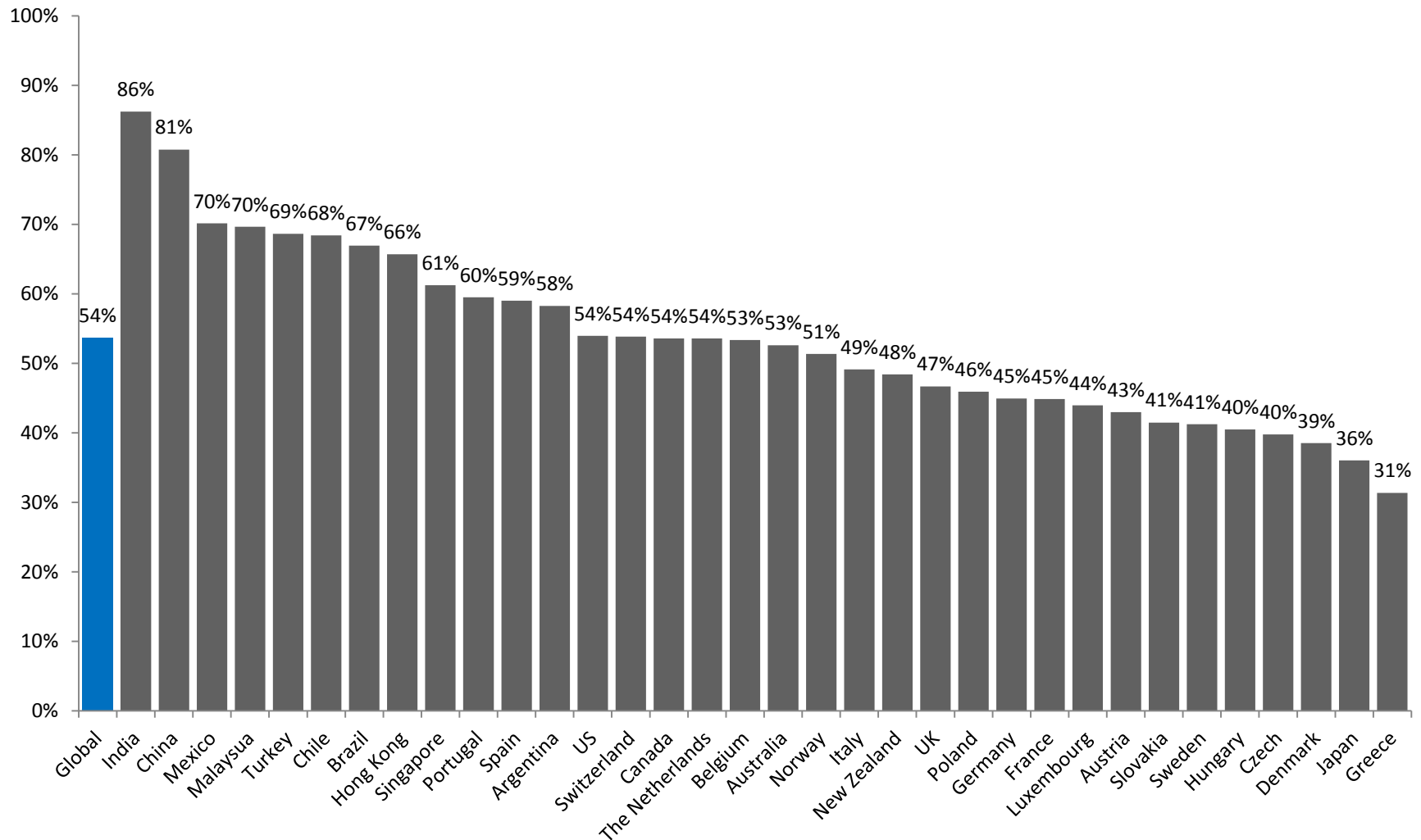
50% expects to receive a one-time financial reward/bonus at the end of this year



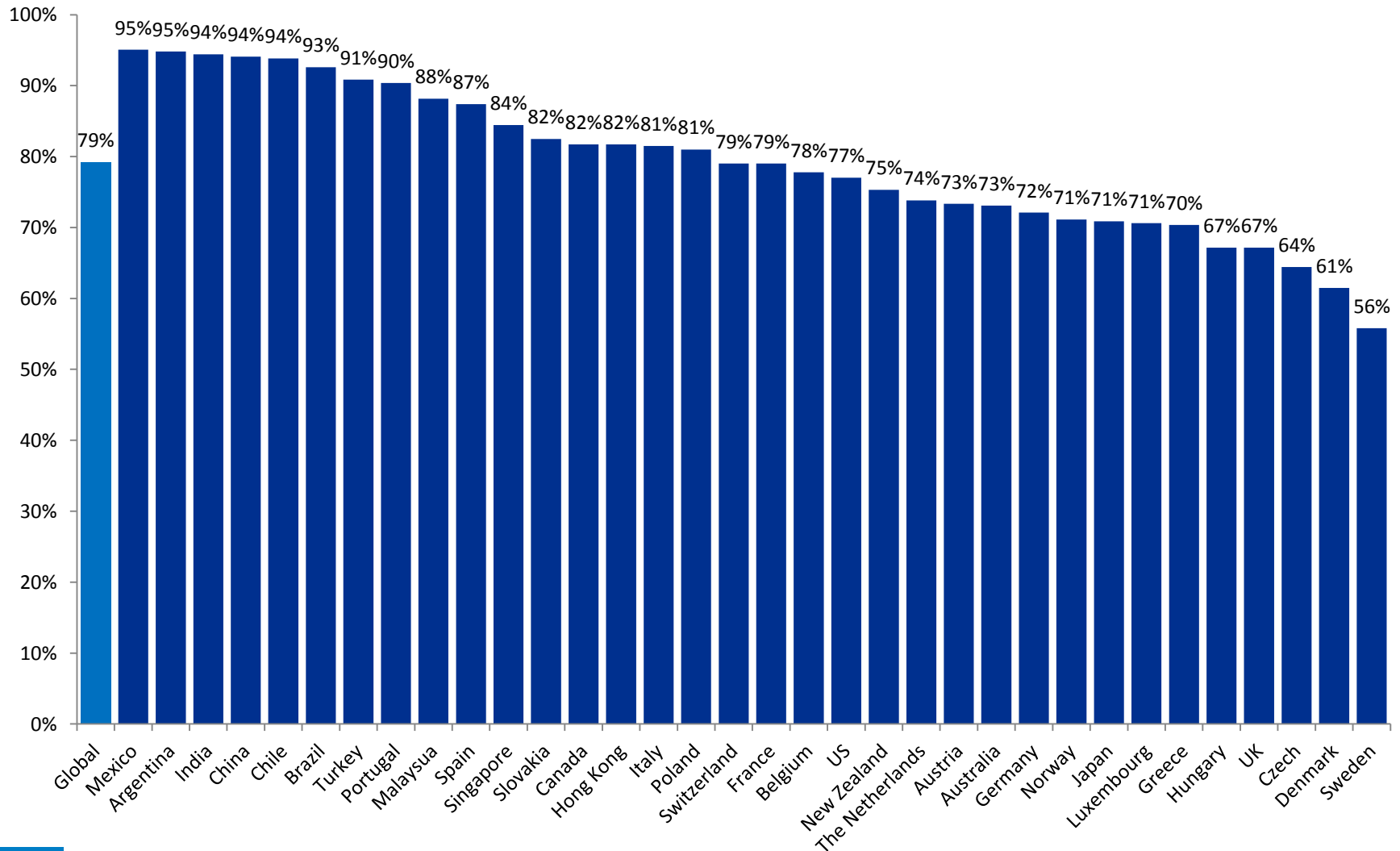
57% says their employer allows them to define their own career path



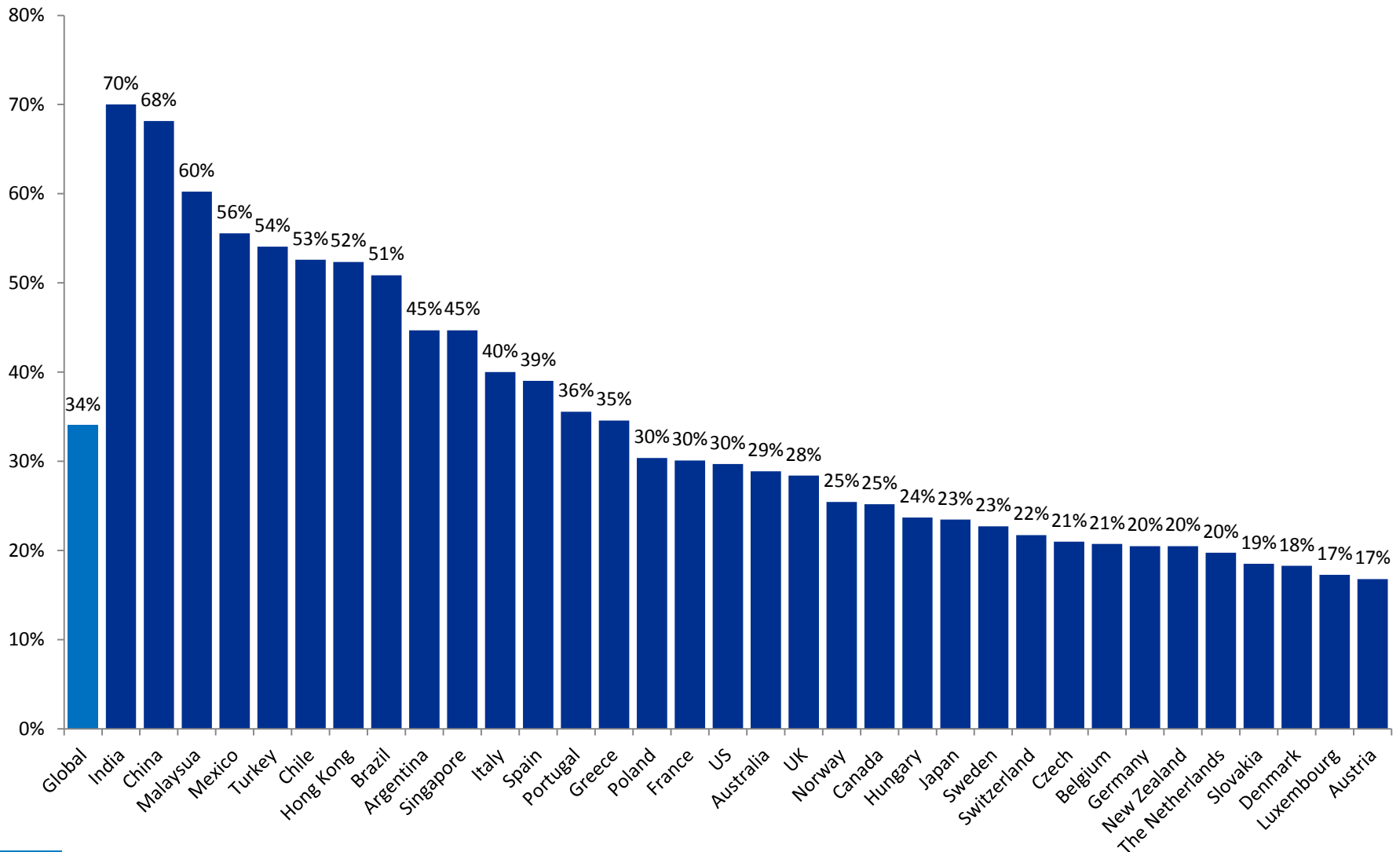
54% says their employer dedicates more time and resources to talent development than 10 years ago



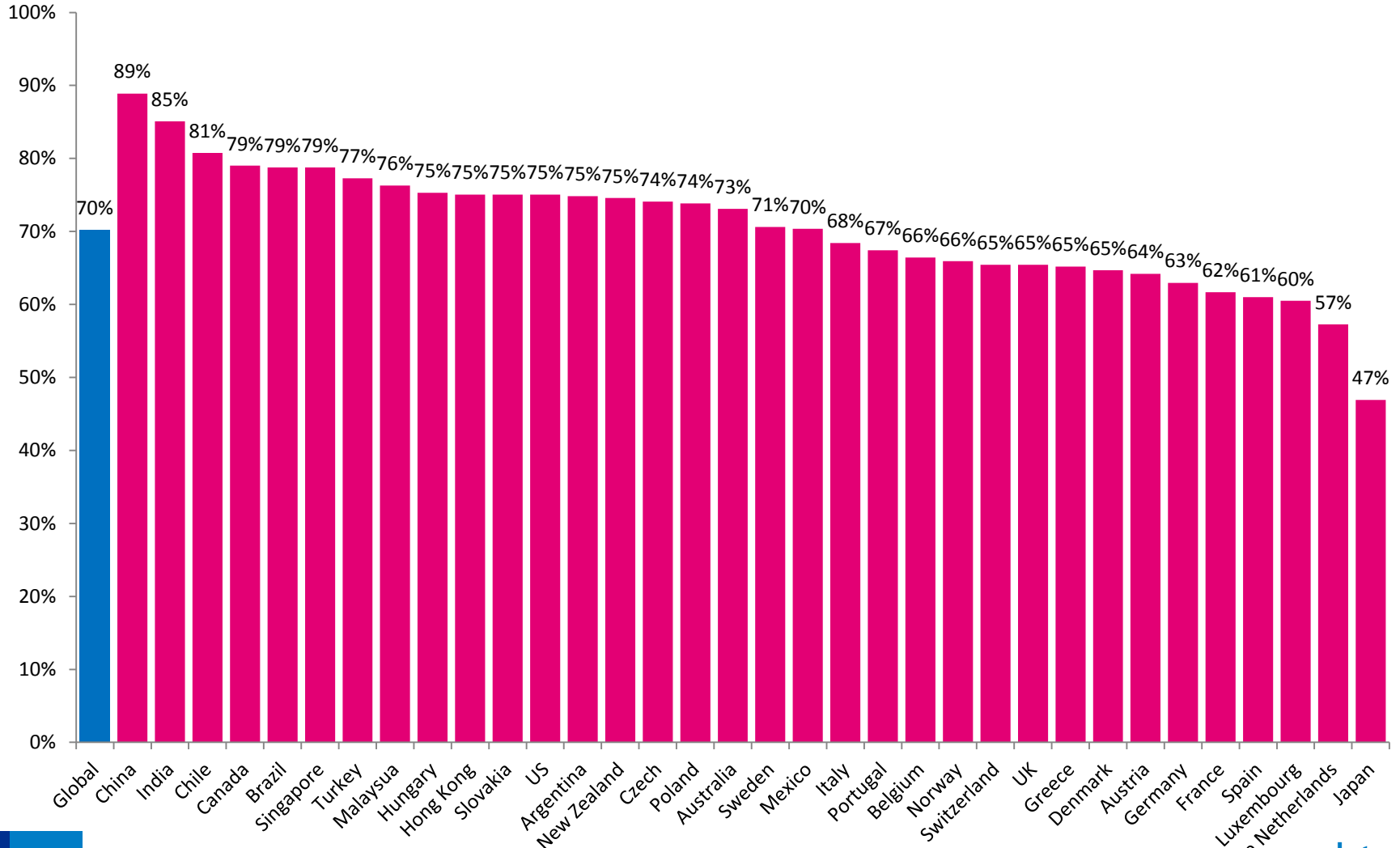
79% agrees that the focus on talent development is an opportunity for personal growth



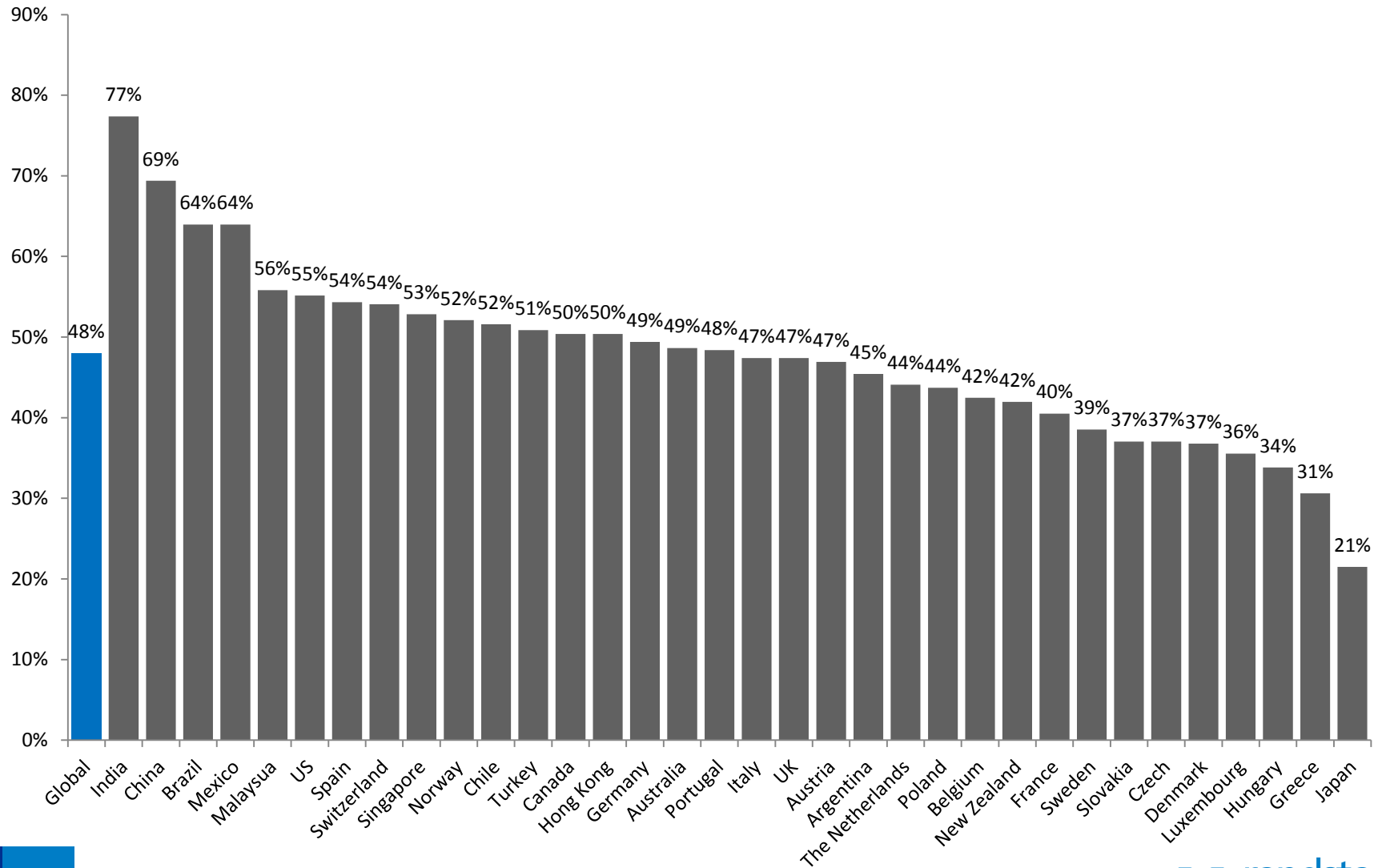
34% believes their current job will be automated within the next decade



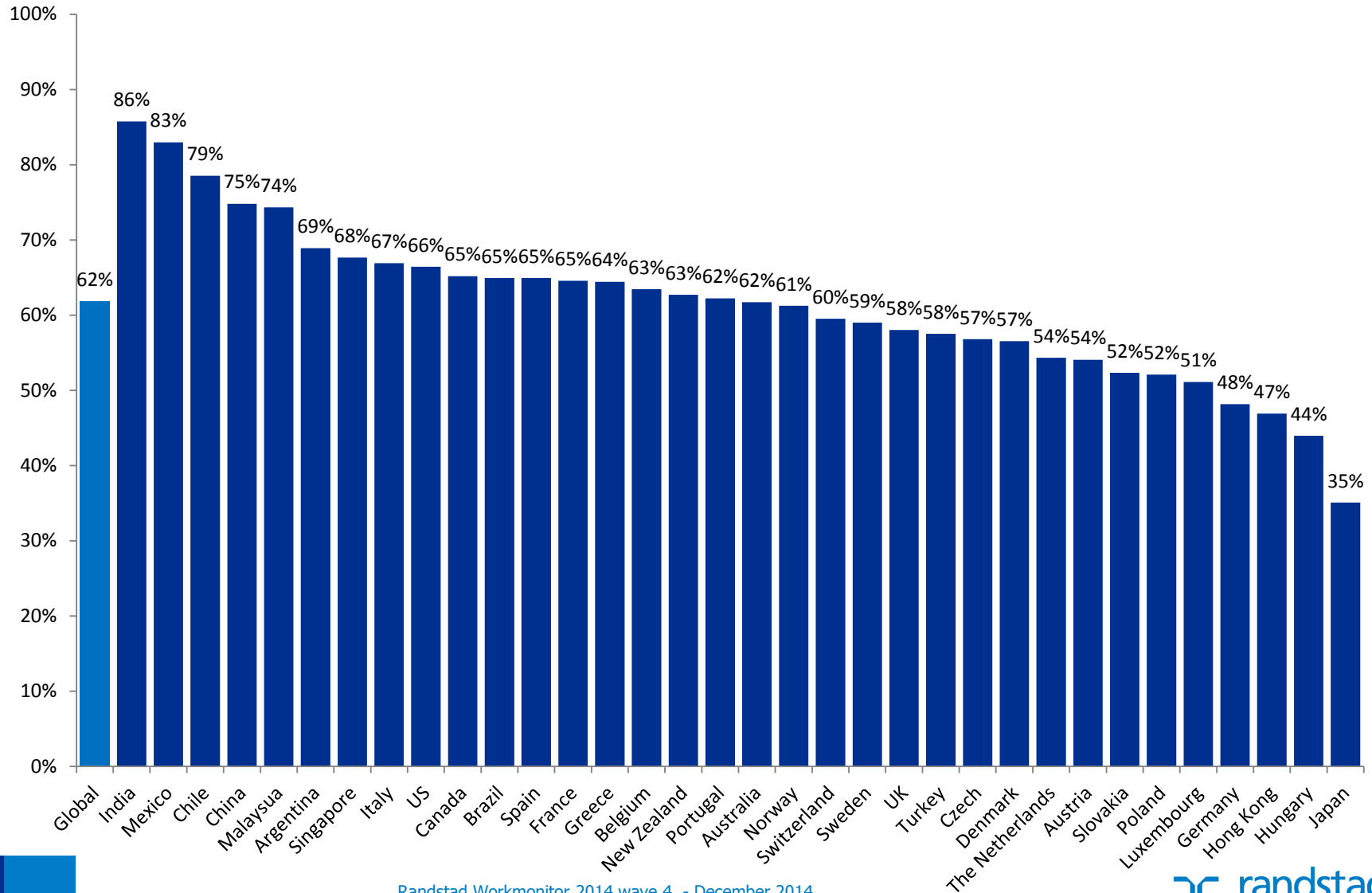
70%: Gen Z (age 14-19) more inclined to demand flexible working arrangements than older generations



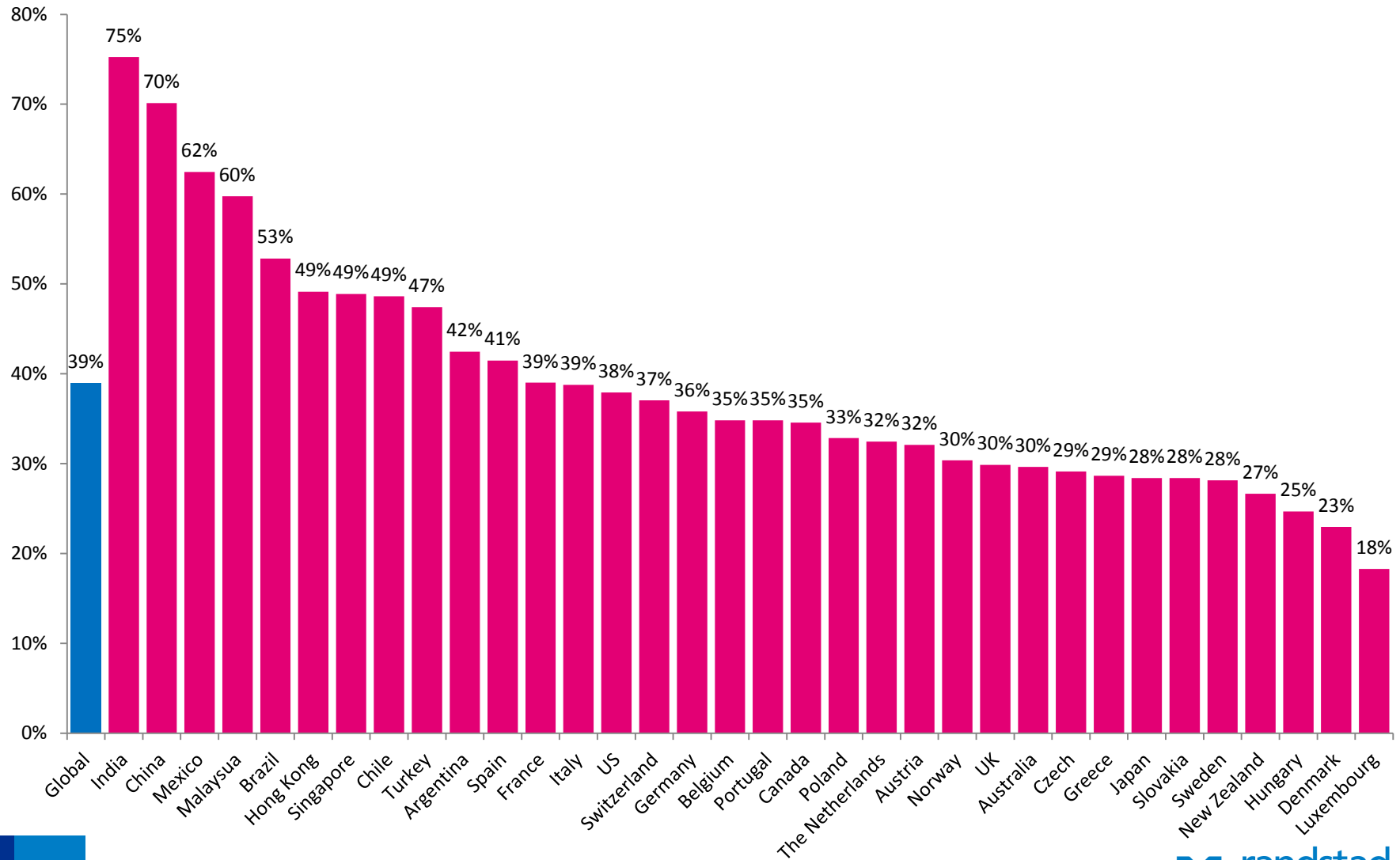
48% states their employer is well-prepared to meet the demands of Gen Z



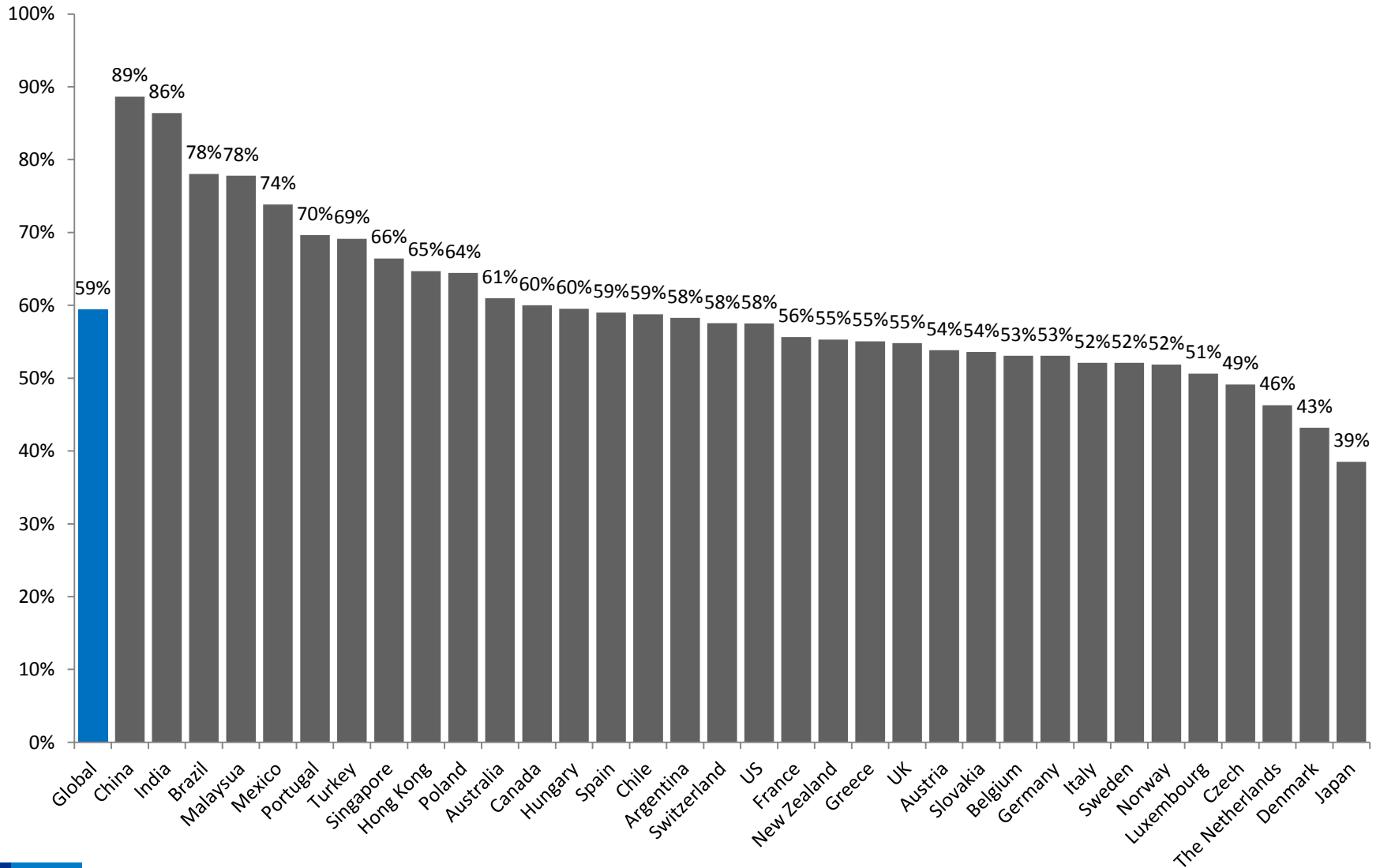
62% says they can learn a lot from Gen Z on the use of technology



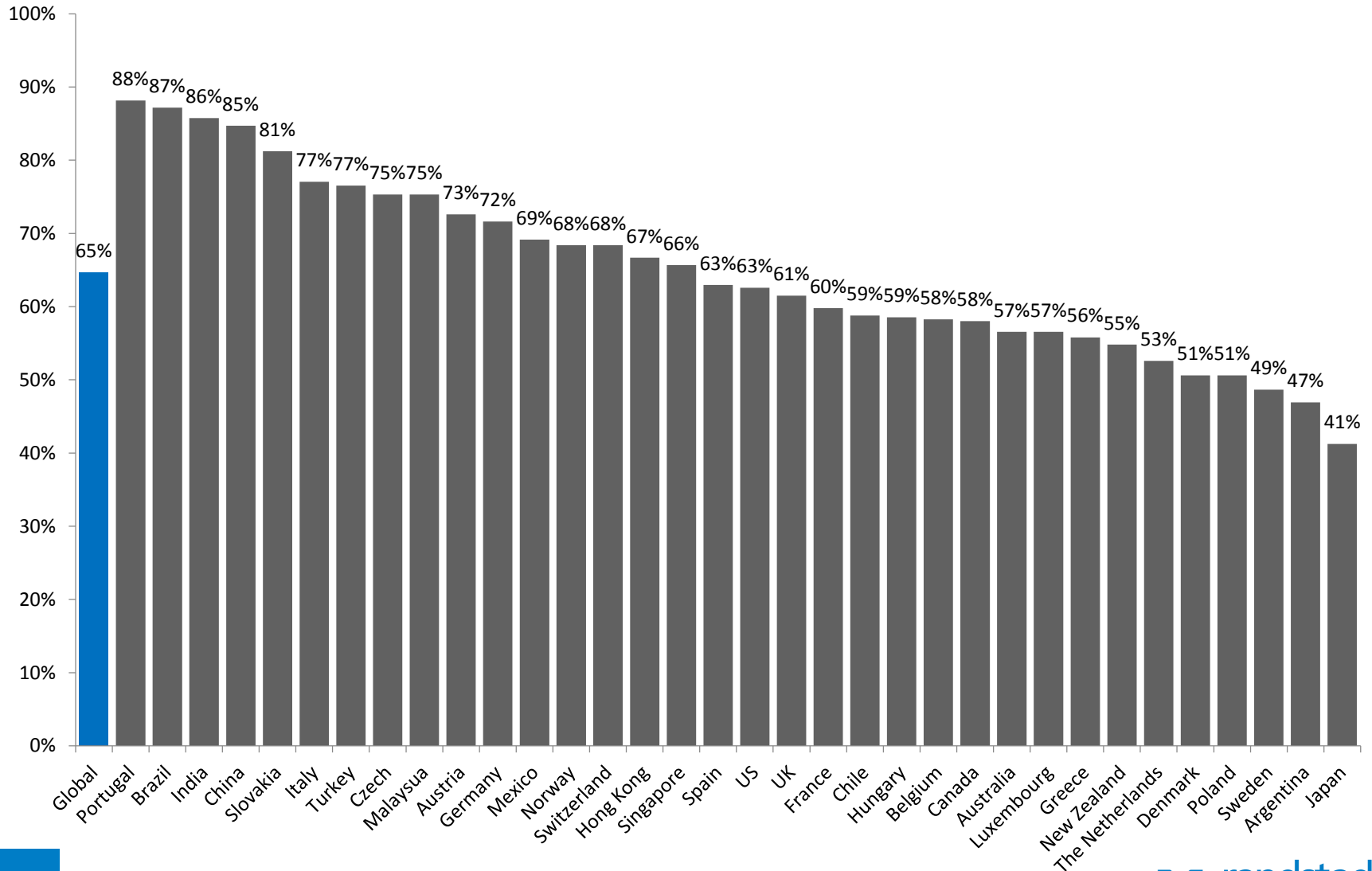
learn from Gen Z re. work-life balance (39% agrees)



59% of the employers actively promote mentorship: older workers coaching younger colleagues

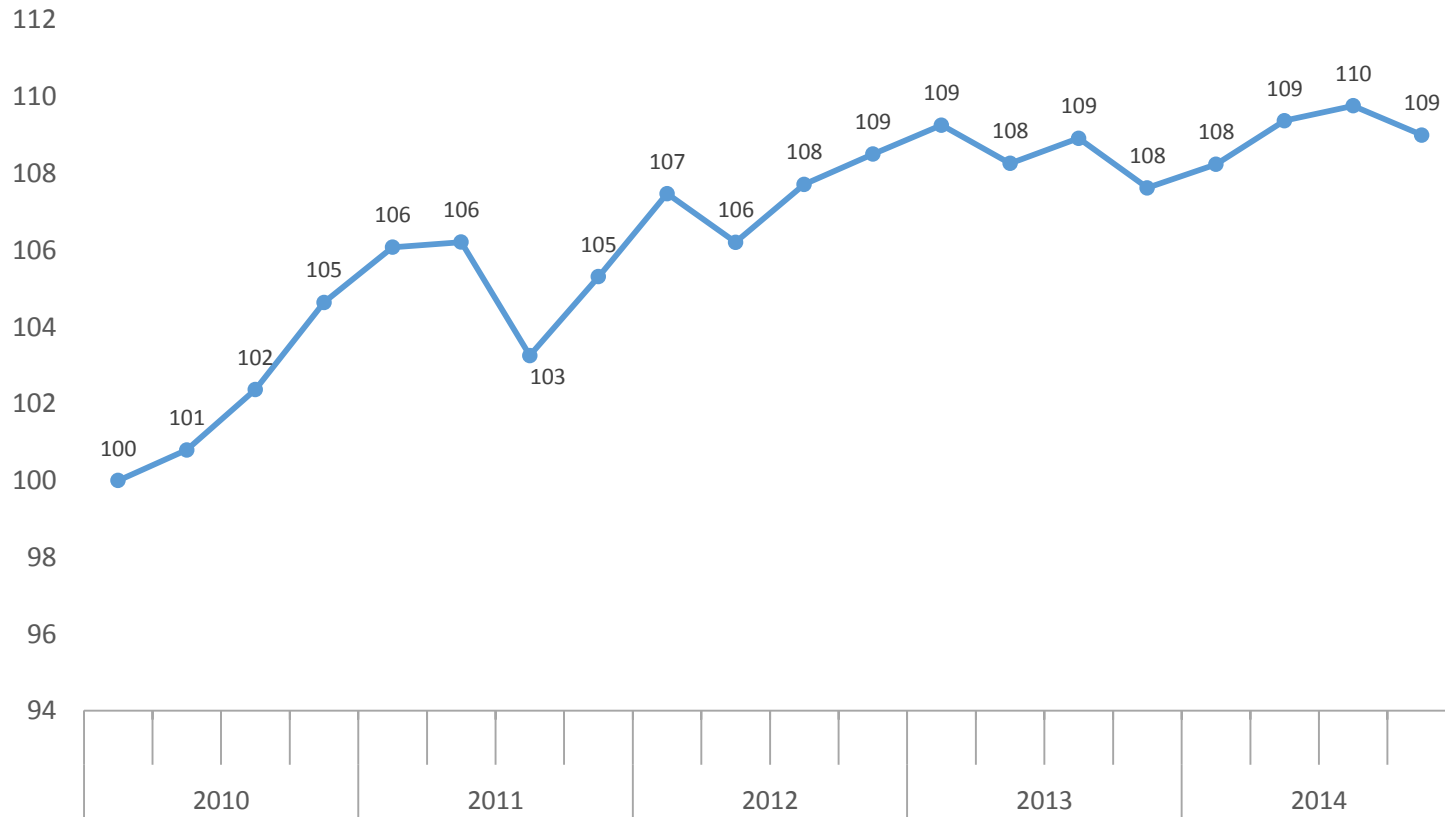


65% says companies need Gen Z to be truly innovative



MOBILITY INDEX

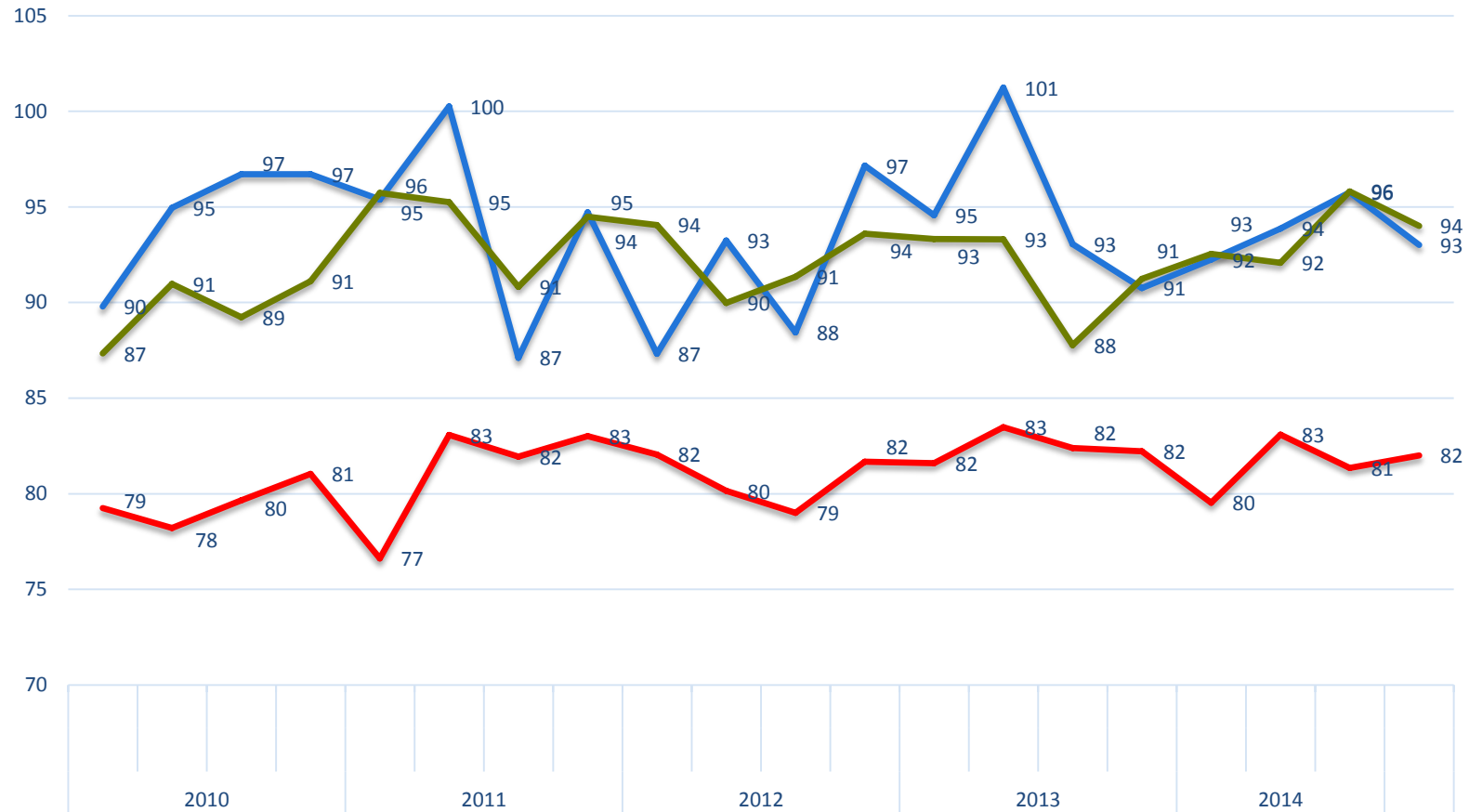
the global Mobility Index steady at 109



Question:

- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
- Do you think you will be doing *different work for a different employer* within the next 6 months?

mobility slightly down in Belgium(-3) and the Netherlands (-2); Luxembourg +1

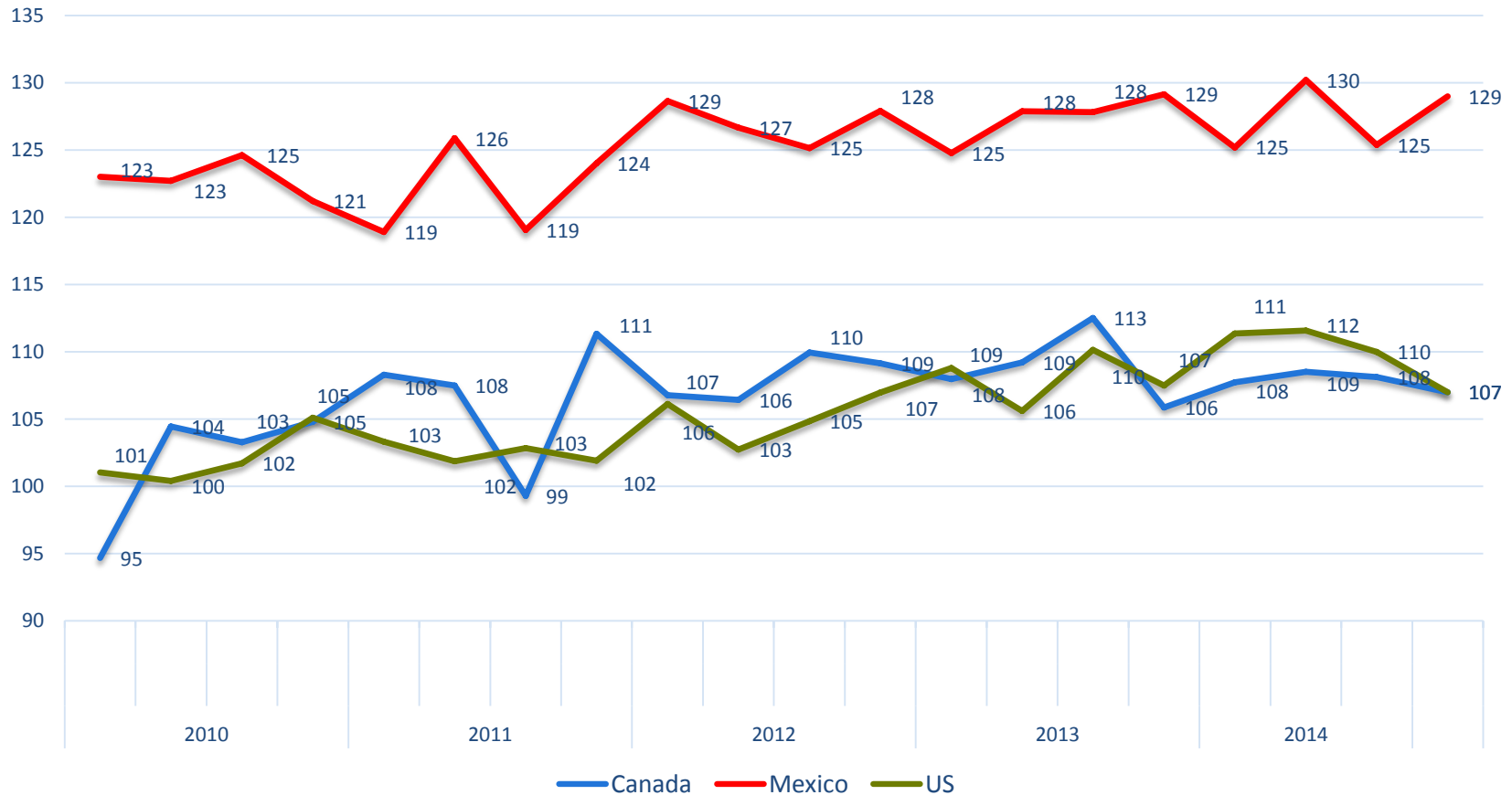


Question:

— Belgium — Luxembourg — The Netherlands

- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
- Do you think you will be doing *different work for a different employer* within the next 6 months?

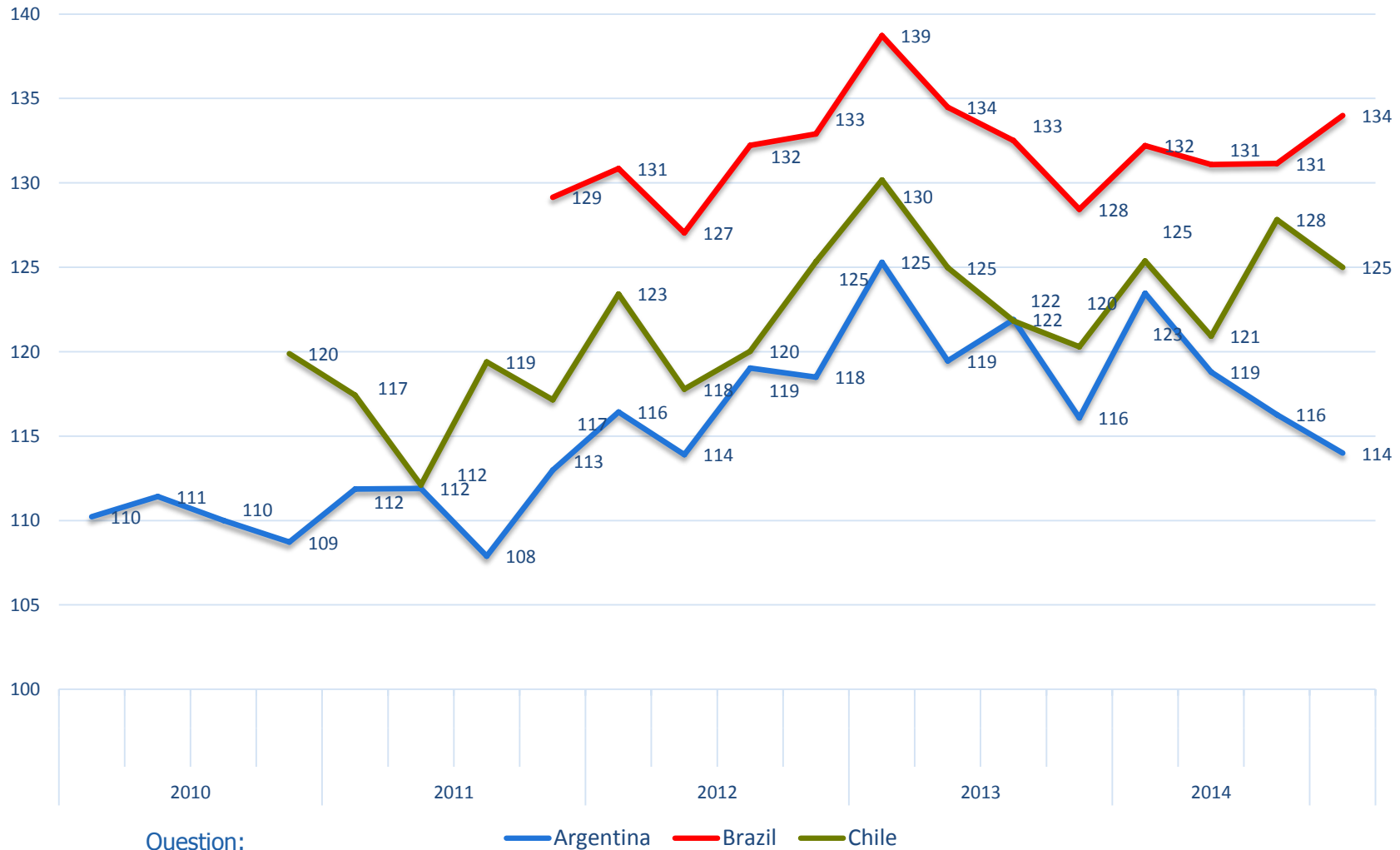
mobility Mexico up (+4); declines in the US (-3) & Canada (-1)



Question:

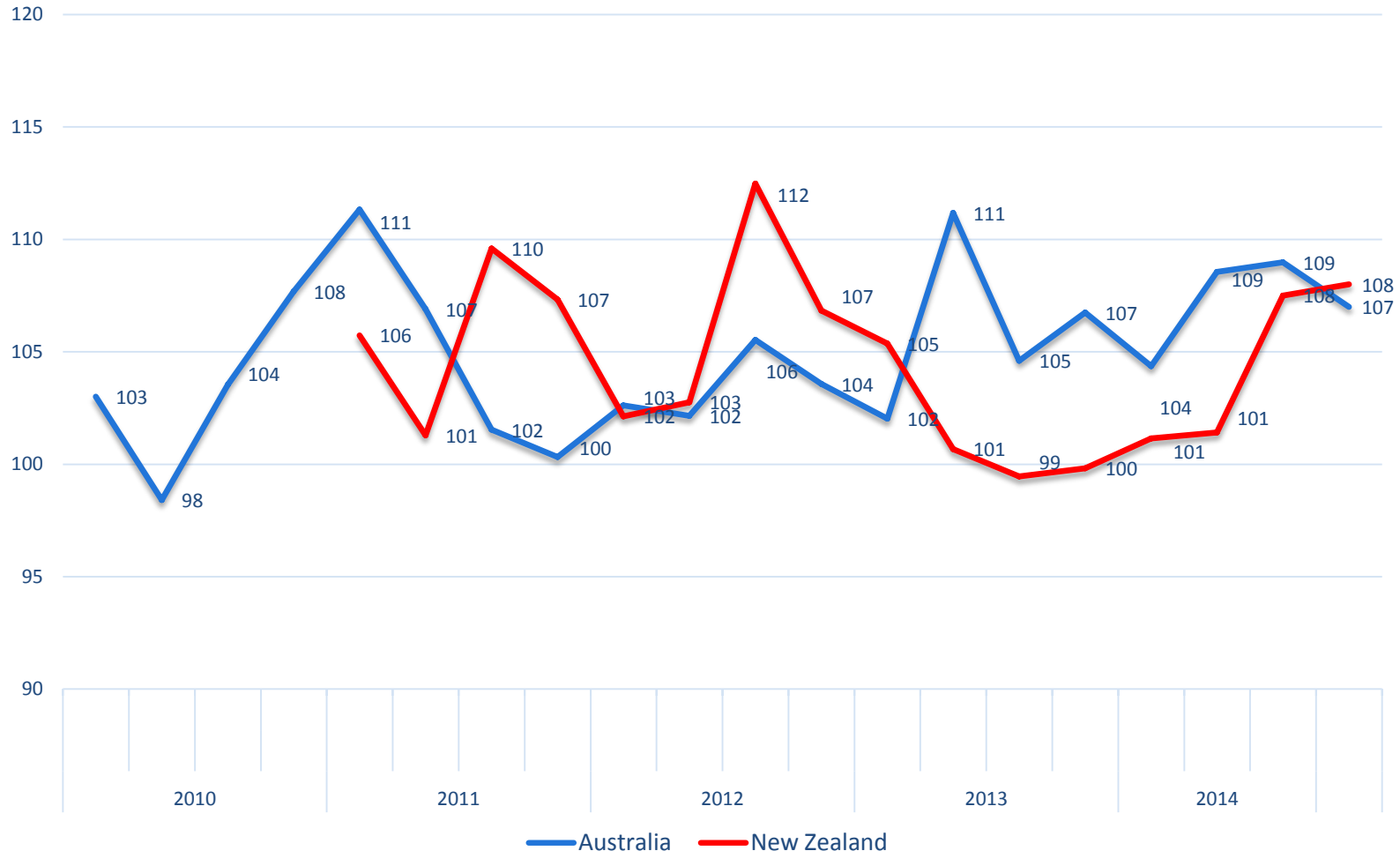
- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
- Do you think you will be doing *different work for a different employer* within the next 6 months?

mobility Brazil up (+3); Chile (-3) and Argentina (-2) down



- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
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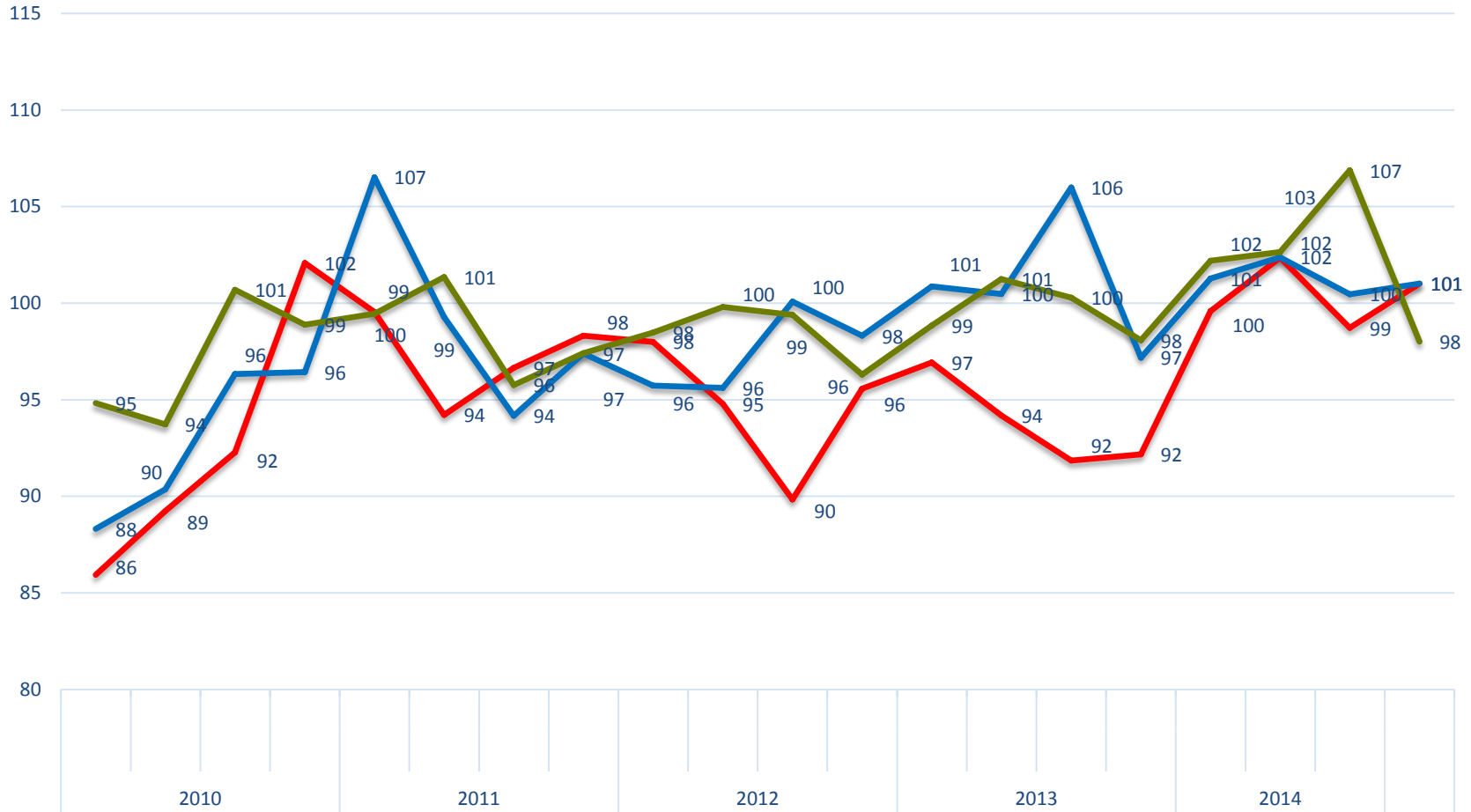
Australia shows a slight decline in mobility (-2); mobility in New Zealand is flat



Question:

- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
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mobility Sweden dips (-9); Denmark (+2) & Norway (+1) slightly up

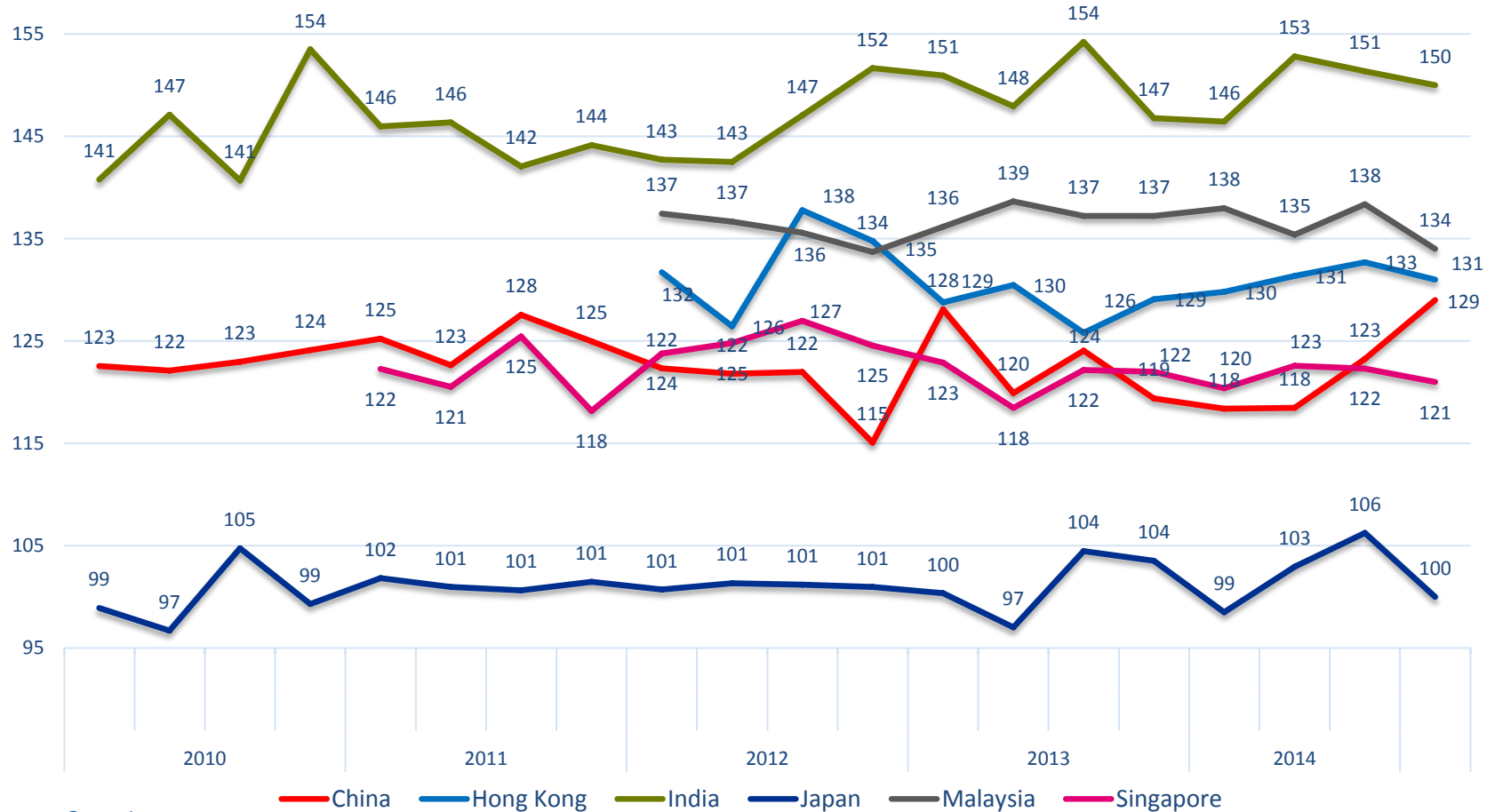


Question:

— Denmark — Norway — Sweden

- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
- Do you think you will be doing *different work for a different employer* within the next 6 months?

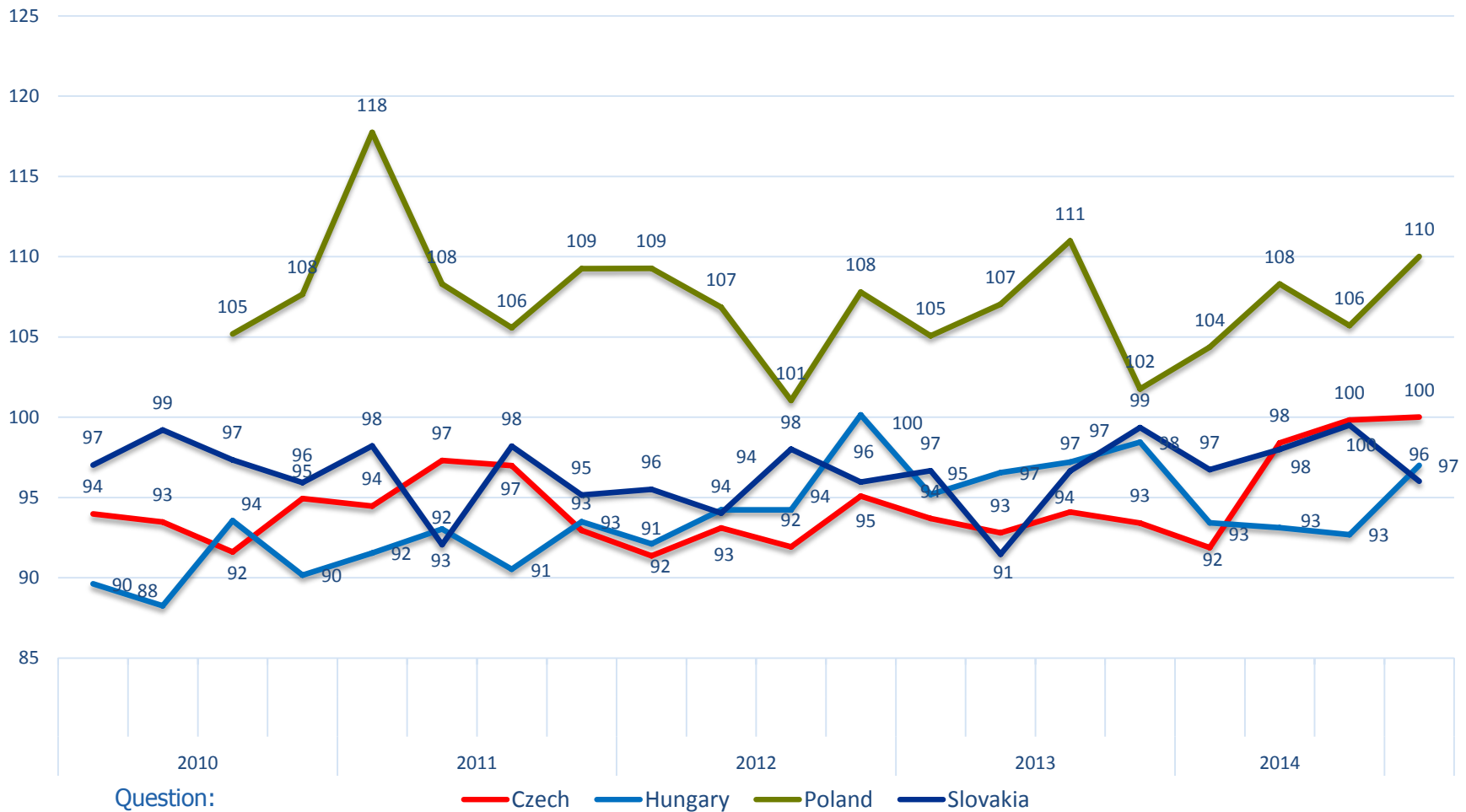
significant increase mobility China (+6); down in Japan (-6), Malaysia (-4), Hong Kong (-2), India & Singapore (-1)



Question:

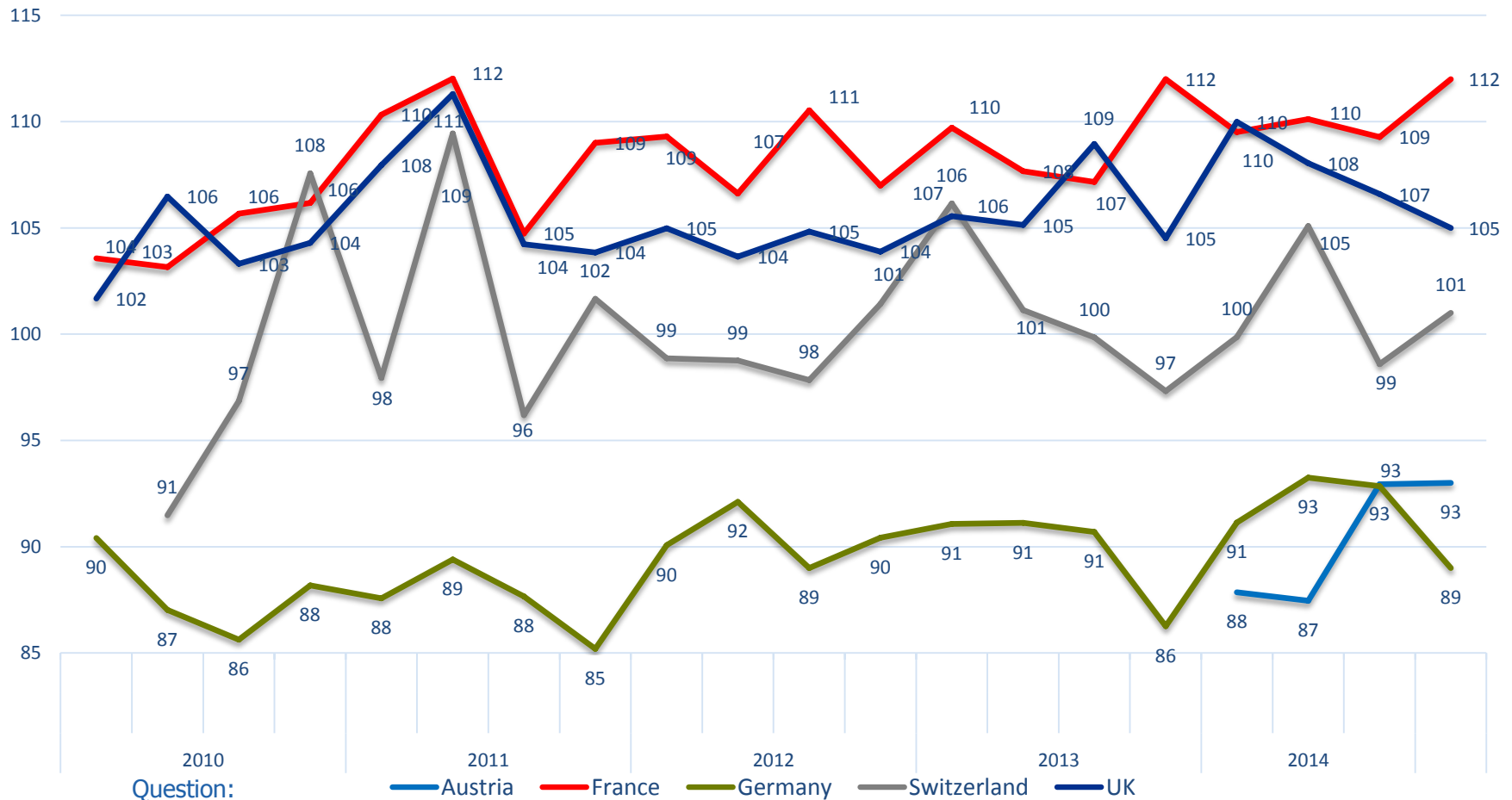
- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
- Do you think you will be doing *different work for a different employer* within the next 6 months?

mobility increases in Poland & Hungary (both +4); Czech Republic is flat; Slovakia at -4



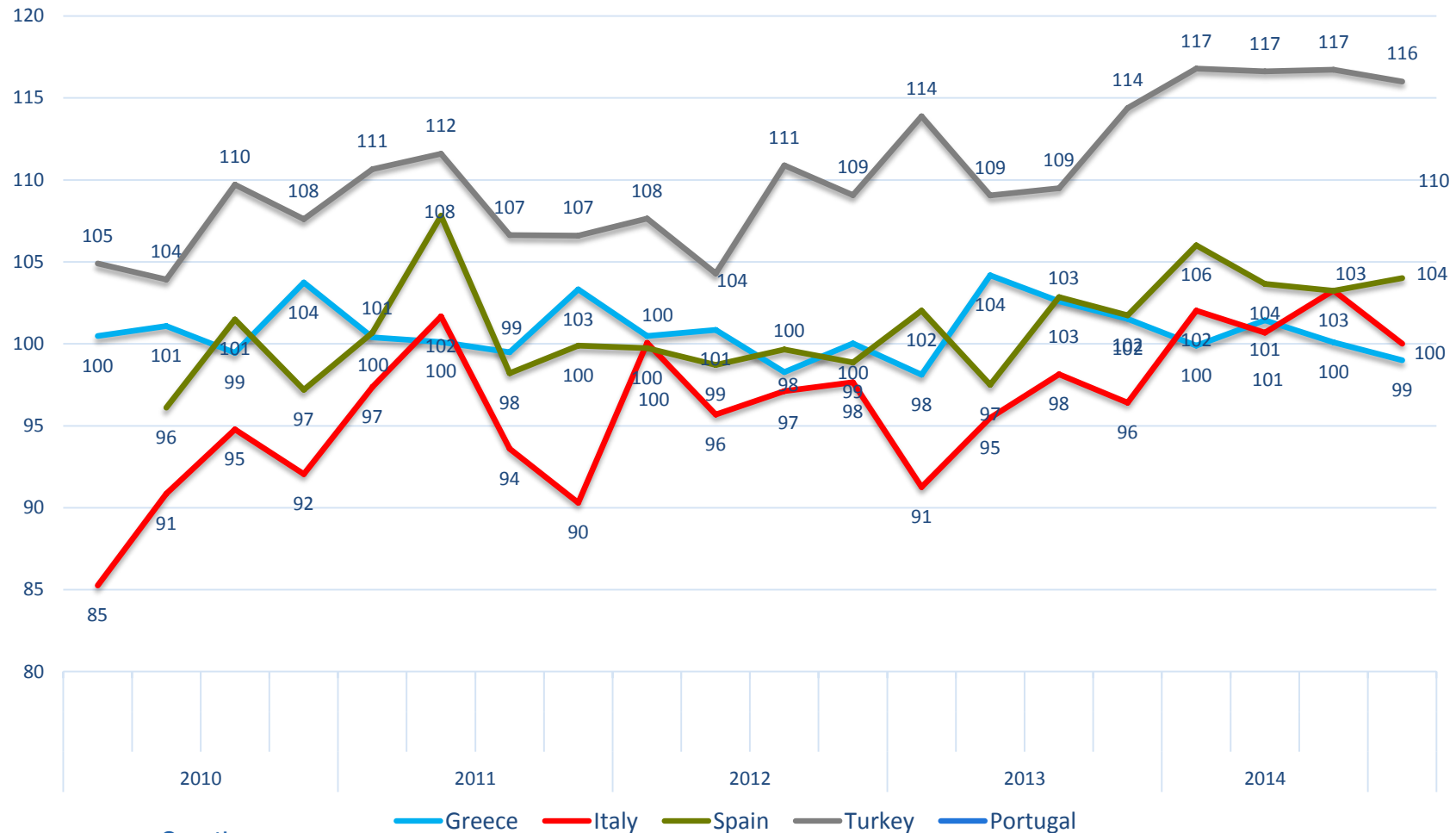
- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
- Do you think you will be doing *different work for a different employer* within the next 6 months?

mobility decline in Germany (-4) & UK (-2), increase in France (+3) & Switzerland (+2); Austria flat



- Do you think you will be doing *the same or comparable work* for a different employer within the next 6 months?
- Do you think you will be doing *different work* for a different employer within the next 6 months?

mobility down in Italy (-3), Turkey & Greece both at -1, Spain slightly up (+1); Portugal comes in at 110

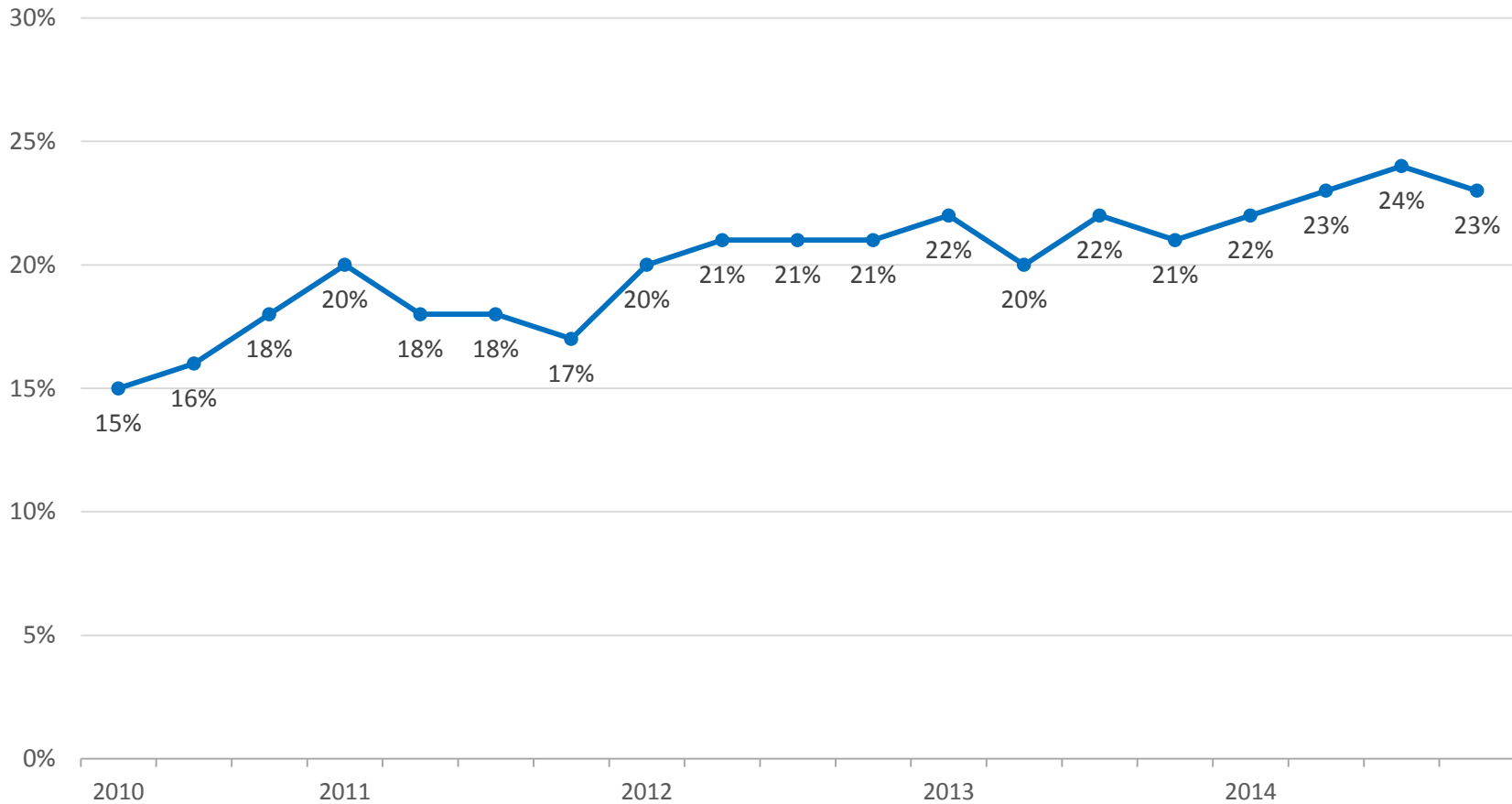


Question:

- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
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ACTUAL JOB CHANGE

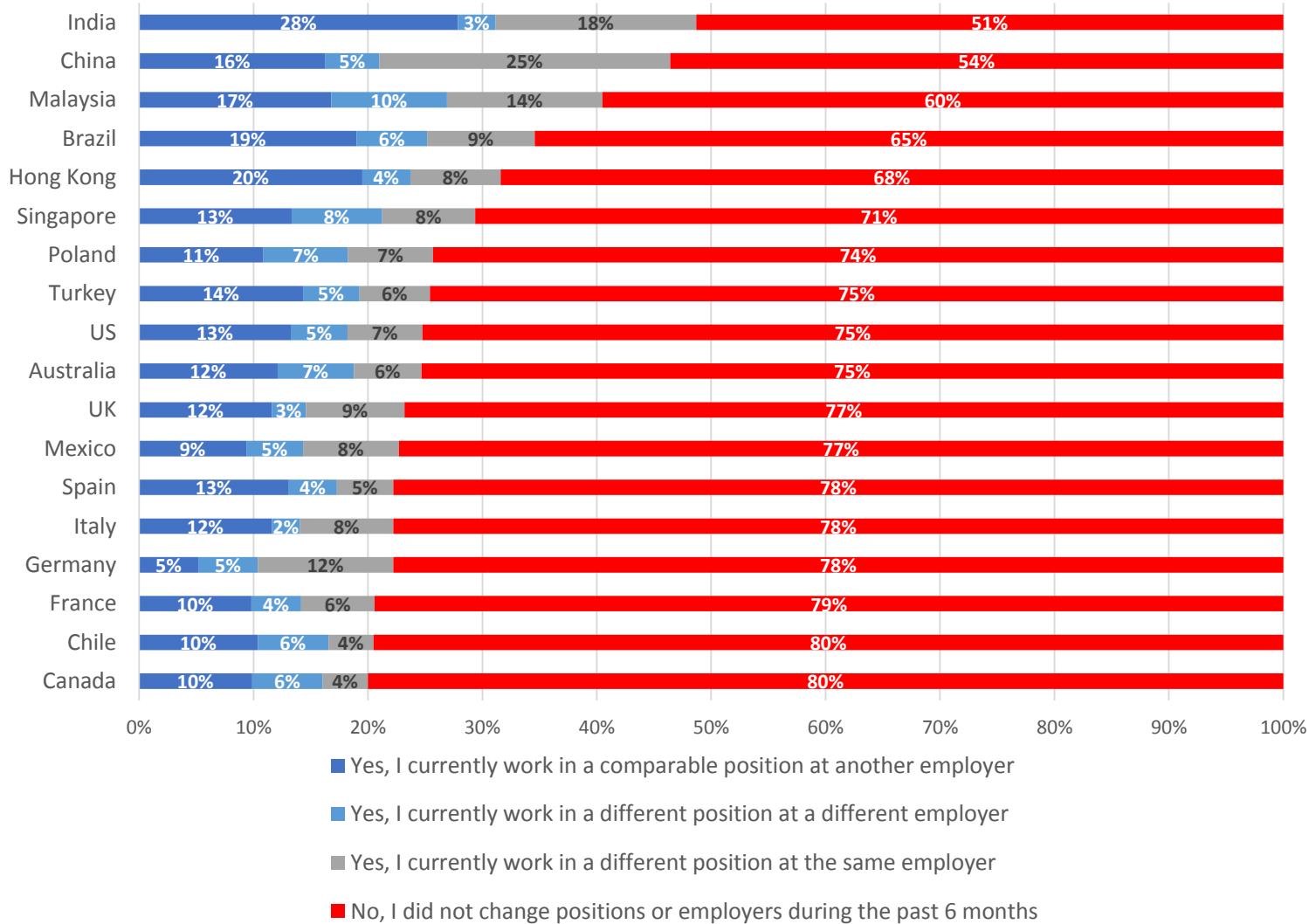
actual job change in the last six months flat at 23%



Question:

Have you changed jobs during the past six months? *If you have started working in your first job during the past six months, this is not a change of employment/employer; please fill in "no"*

actual job change highest in Asia

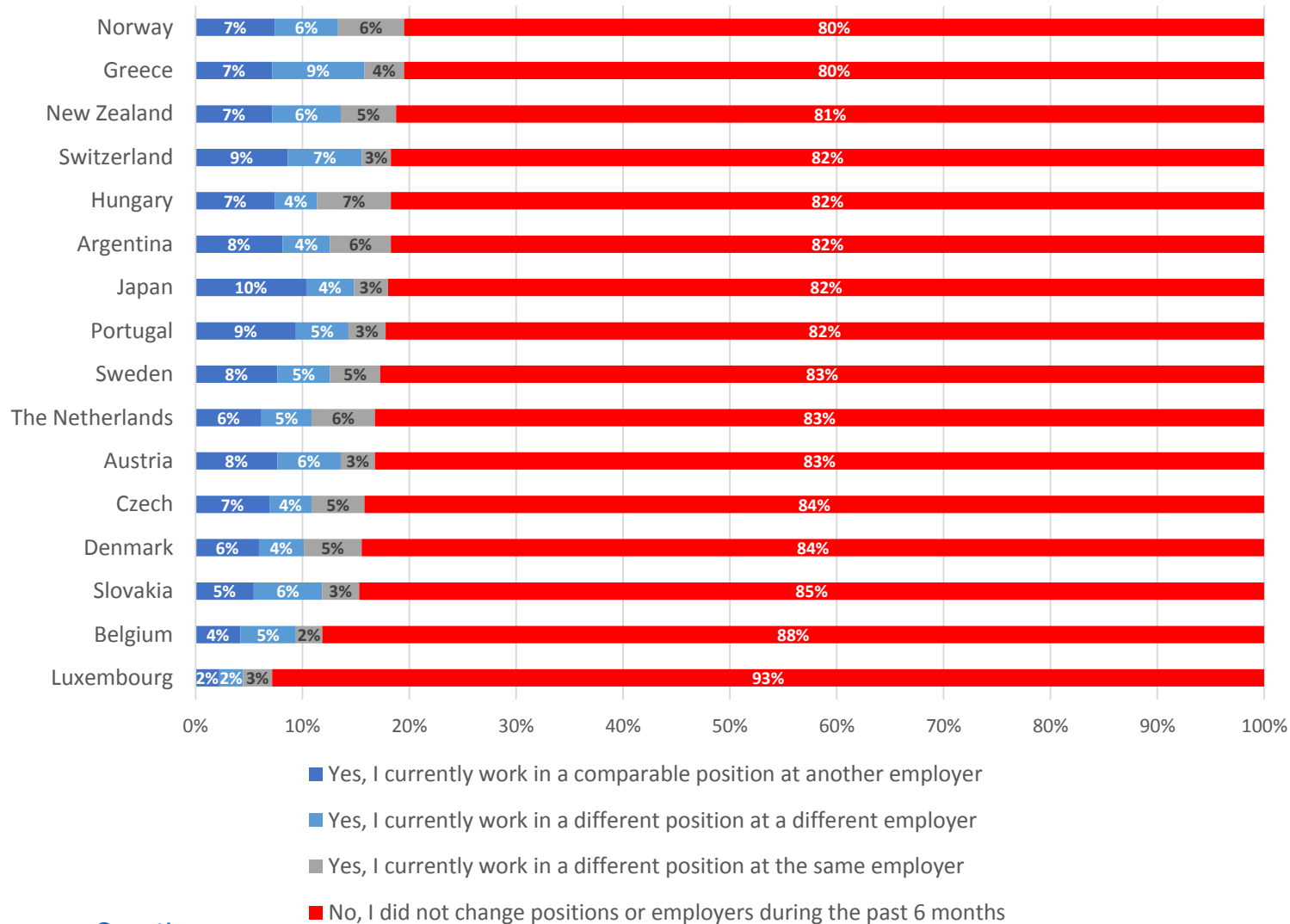


Compared to last quarter there are no shifts in job change. For most countries the majority of job changes are moves to a different employer.

Question:

Have you changed jobs during the past six months?

actual job change lowest in Belgium & Luxembourg

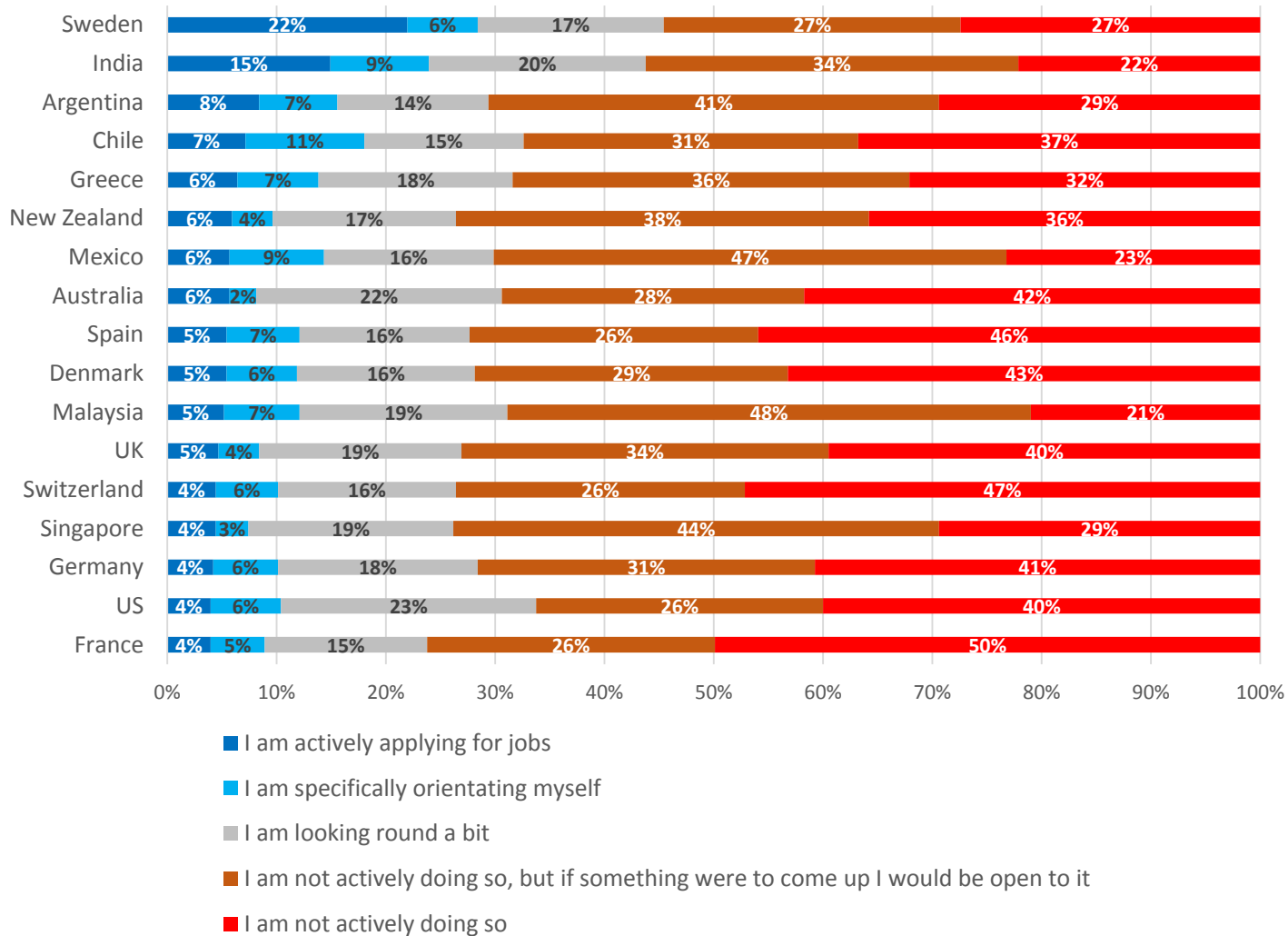


Question:

Have you changed jobs during the past six months?

JOB CHANGE APPETITE

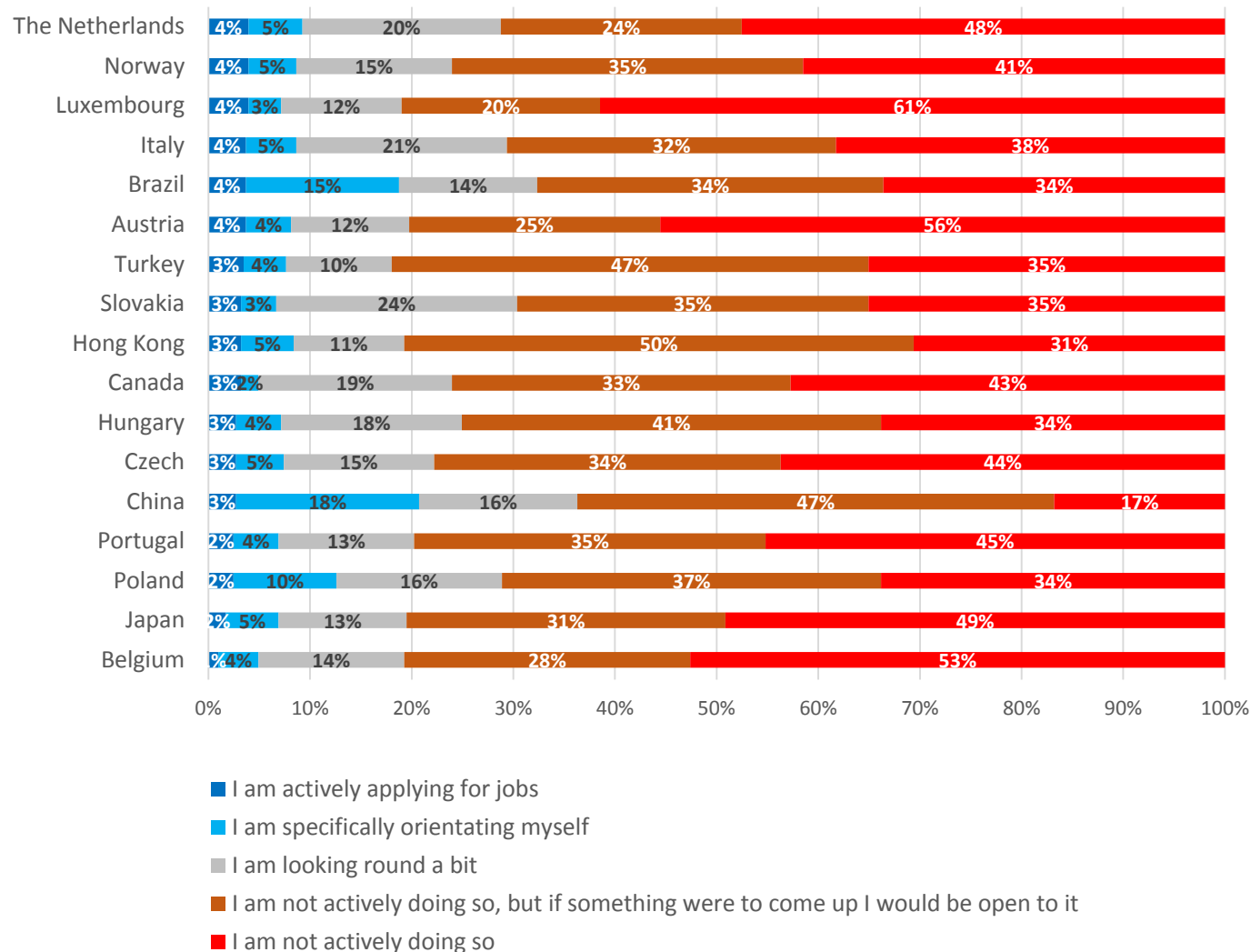
Sweden & India highest appetite for job change



The appetite to switch jobs continues to be highest in Sweden and India.

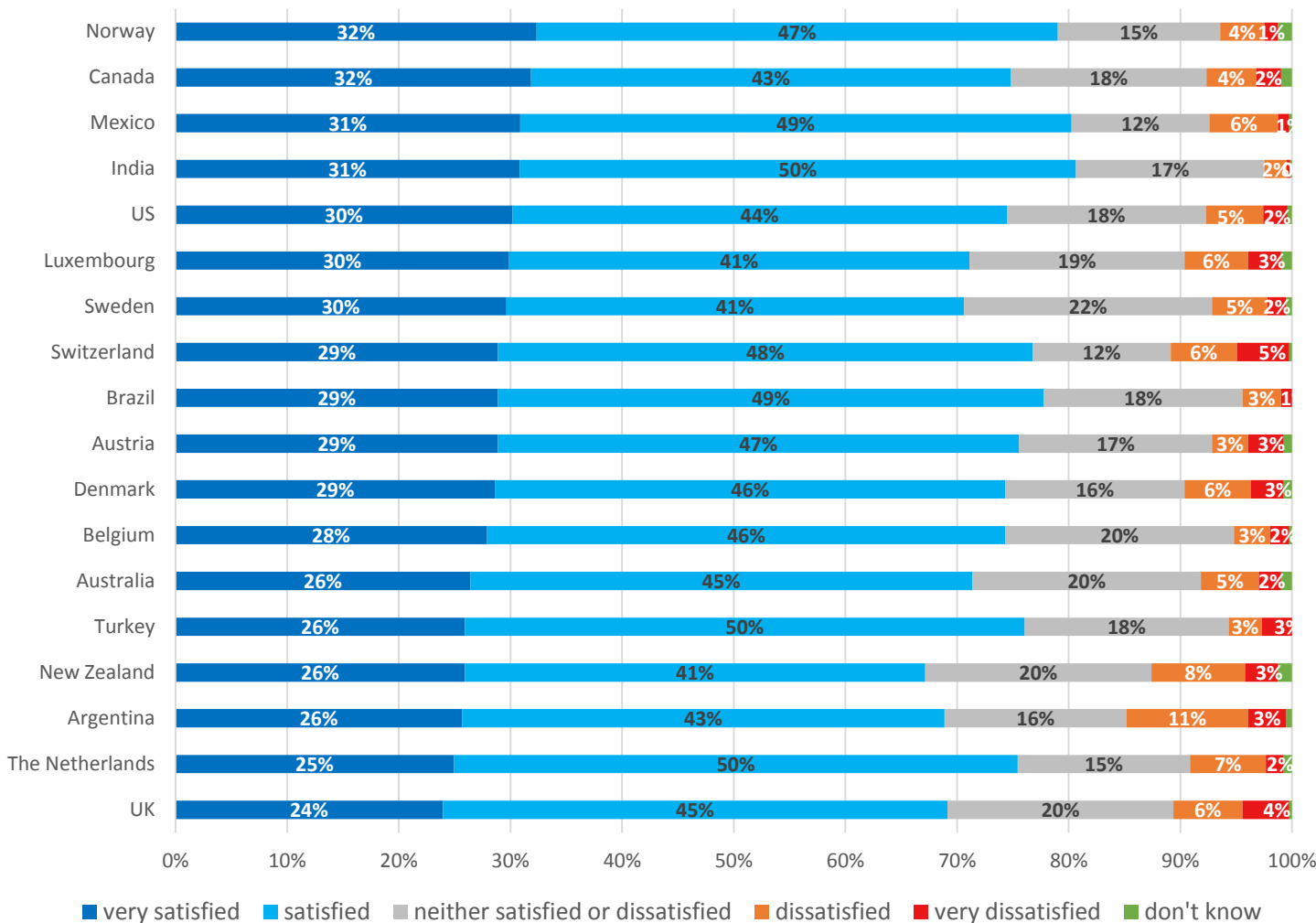
However, in India the appetite for job change decreased compared to last quarter.

Luxembourg, Austria & Belgium lowest appetite for job change



JOB SATISFACTION

job satisfaction highest in Norway, Mexico and India



50% of all countries show a high level of job satisfaction (top-2 box "very satisfied/satisfied": 70% or more).

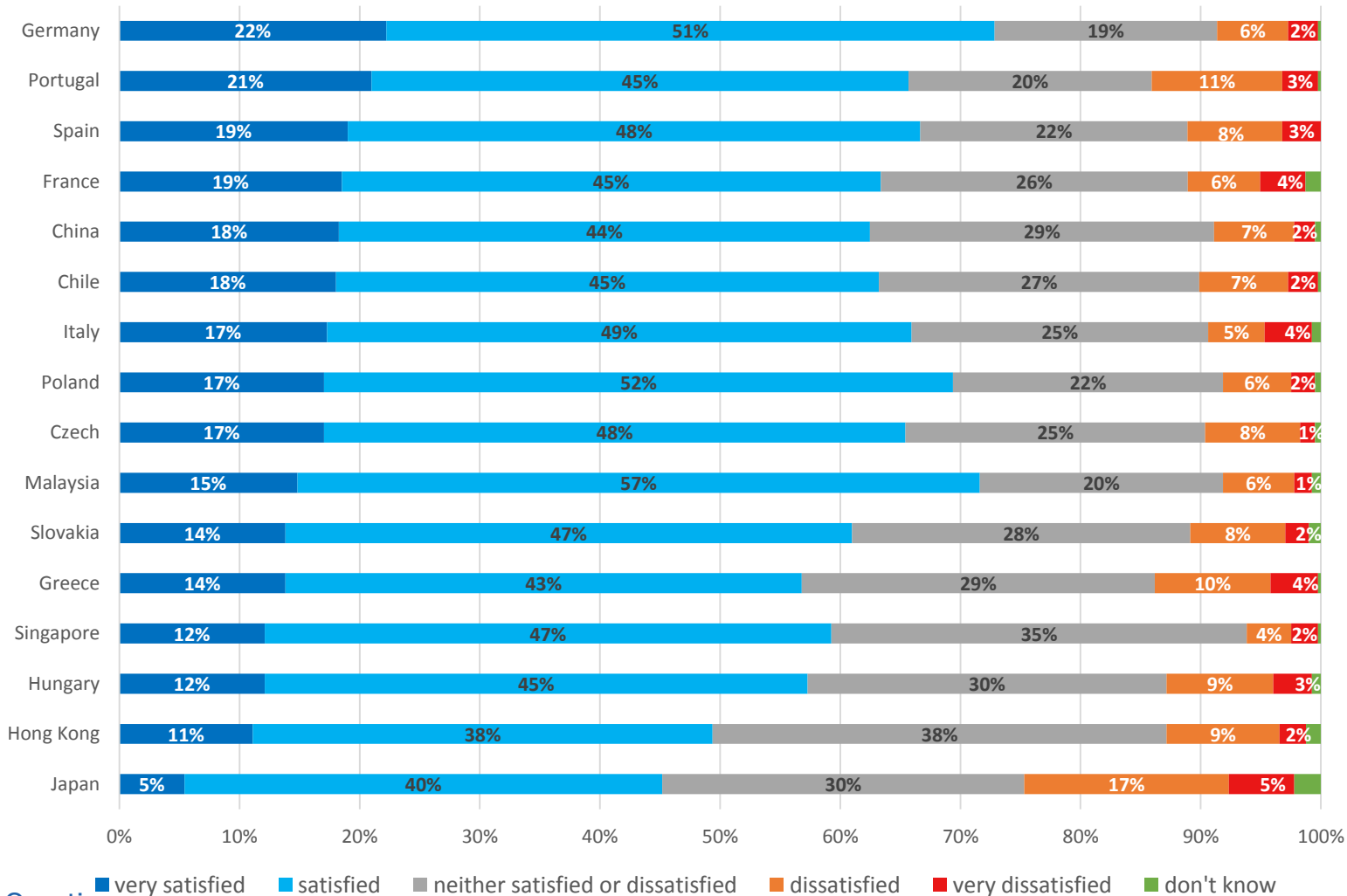
Job satisfaction slightly increased in Argentina, Hungary and Japan compared to last quarter.

Employees in Denmark and New Zealand became somewhat less satisfied with their employer compared to last quarter.

Question:

•How satisfied are you in general about working with your current employer?

job satisfaction lowest in Japan and Hong Kong



Question:

•How satisfied are you in general about working with your current employer?

ABOUT THE RANDSTAD WORKMONITOR

Background to Randstad Workmonitor (1)

- The Randstad Workmonitor was launched in the Netherlands in 2003, then in Germany, and now covers 34 countries around the world. The last country to join was Portugal in 2014. The study encompasses Europe, Asia Pacific and the Americas. The Randstad Workmonitor is published 4 times a year, making both local and global trends in mobility visible over time.
- The Workmonitor's Mobility Index, which tracks employee confidence and captures the likelihood of an employee changing jobs within the next 6 months, provides a comprehensive understanding of sentiments and trends in the job market. Besides mobility, the survey addresses employee satisfaction and personal motivation as well as a rotating set of themed questions.

Background to Randstad Workmonitor (2)

- the study is conducted online among employees aged 18-65, working a minimum of 24 hours a week in a paid job (not self-employed). Minimum sample size is 400 interviews per country. The Survey Sampling International (SSI) panel is used for sampling purposes. The 4th wave of 2014 was conducted between October 23 - November 5, 2014 in the following countries:

Argentina	Czech Republic	Italy	Singapore
Australia	Denmark	Japan	Slovakia
Austria	France	Luxembourg	Spain
Belgium	Germany	Malaysia	Sweden
Brazil	Greece	Mexico	Switzerland
Canada	Hong Kong	New Zealand	The Netherlands
Chile	Hungary	Norway	Turkey
China	India	Poland	UK
		Portugal	USA

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