

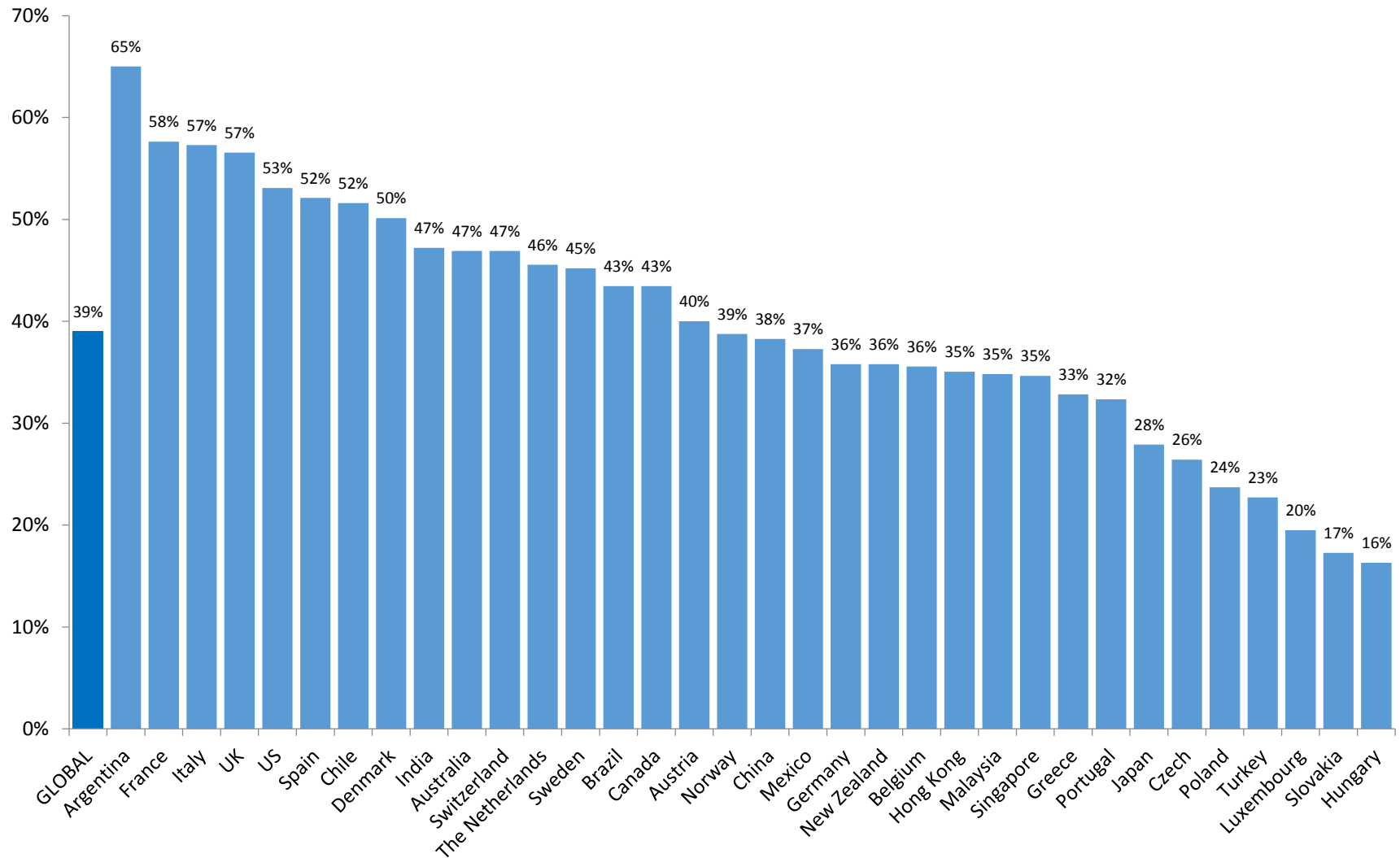
global report Randstad Workmonitor wave 1, 2015
**Growing to be 100 years old: impact on
pensions, employability, and older
workers biases**
incl. quarterly mobility, job change and job satisfaction

Group communications
Randstad Holding nv
March 2015

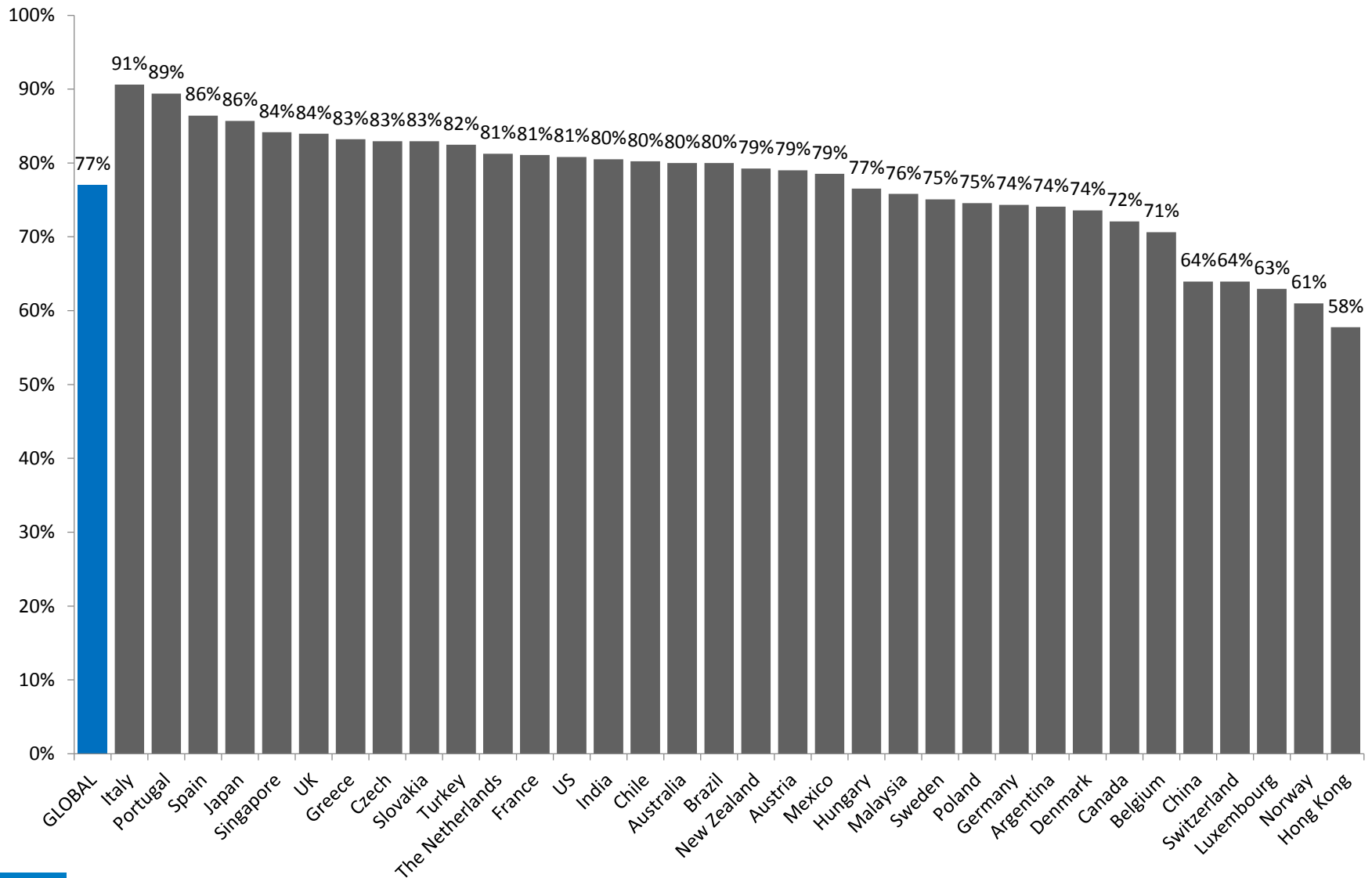


AGING: IMPACT ON PENSION & EMPLOYABILITY AND OLDER WORKERS BIASES

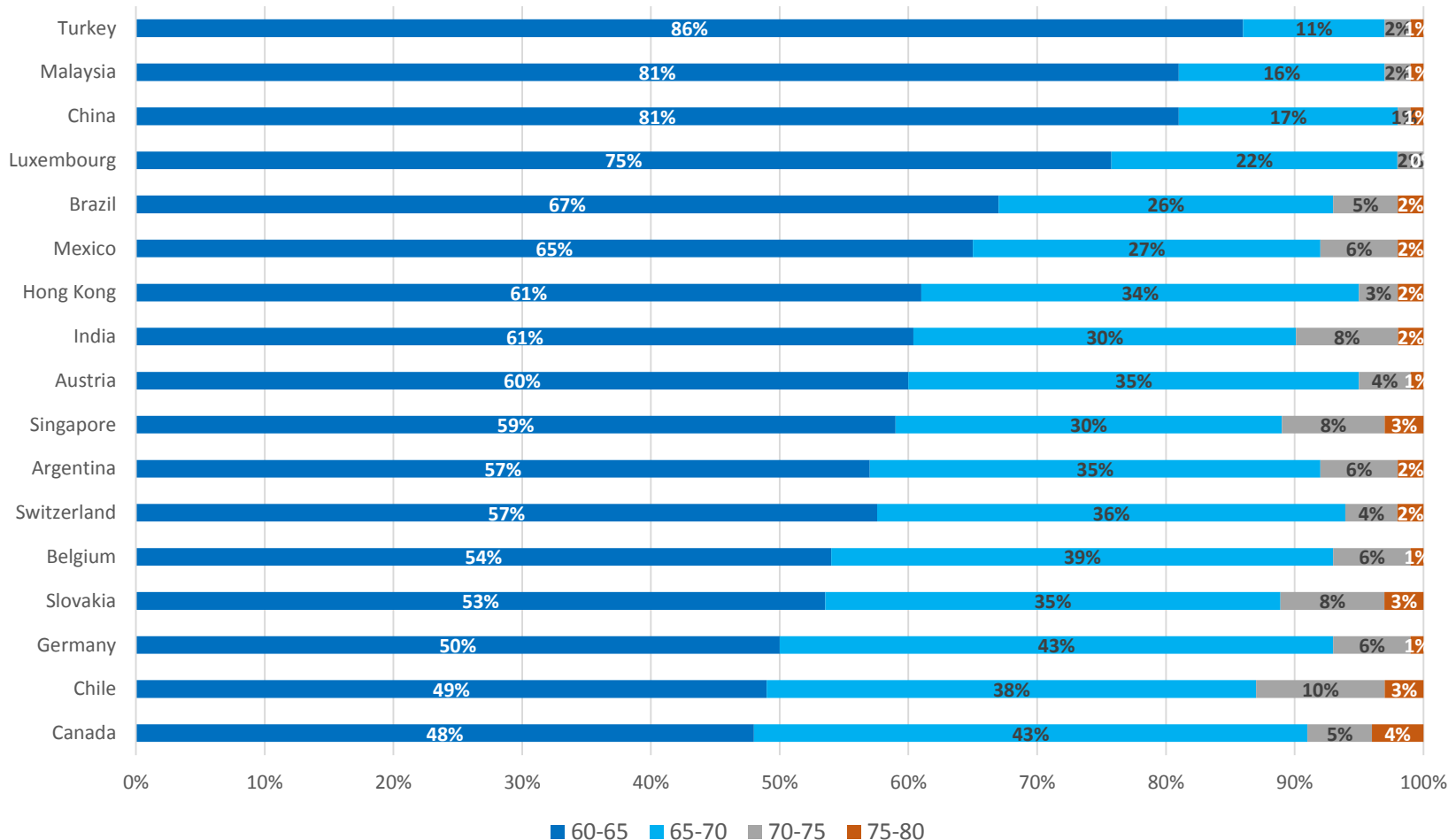
only 39% believe that children born today will live to be 100 years



77% expect to work longer than the current retirement age in their country



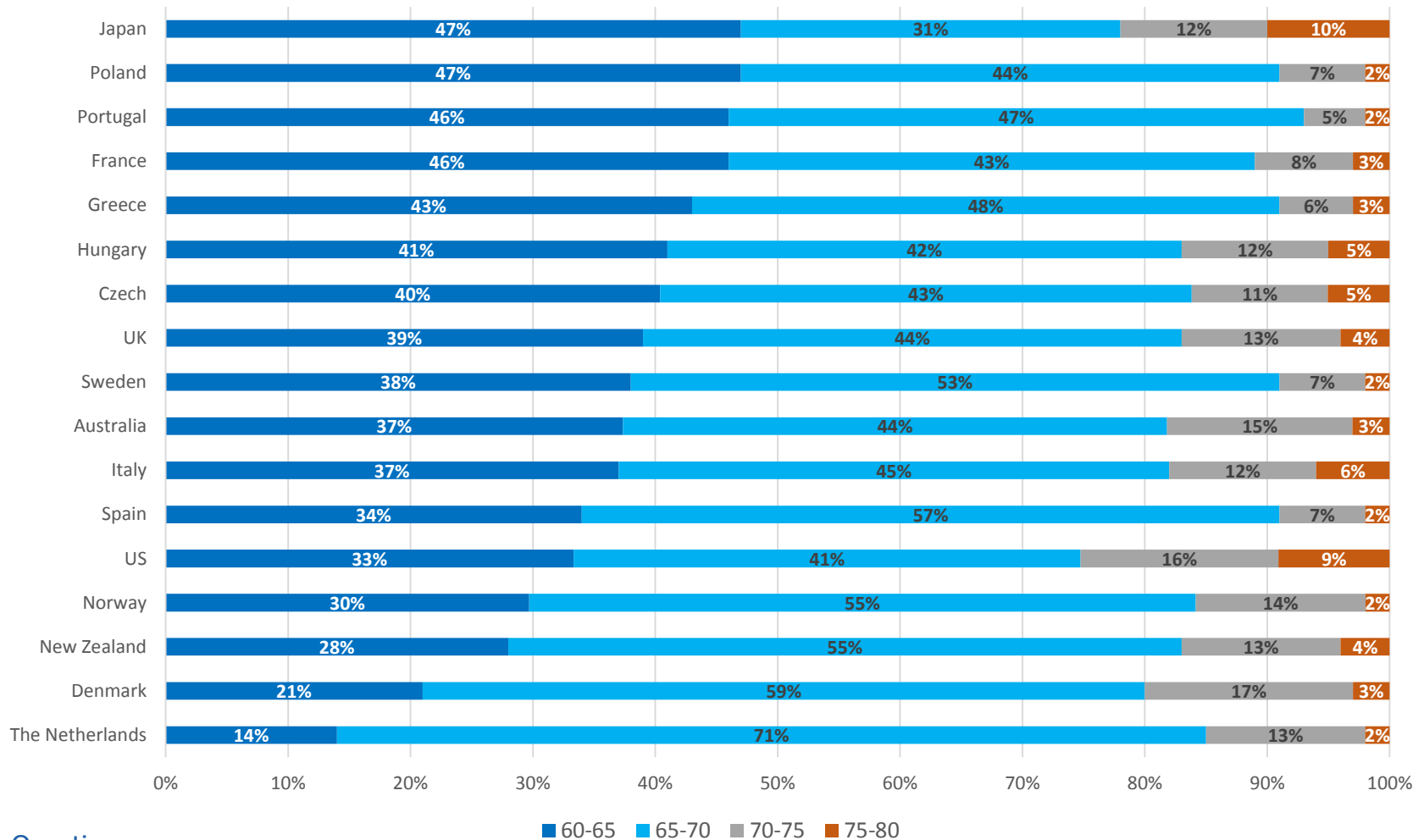
most employees expect to retire at 60-65



Question:

- I expect to retire between age ?

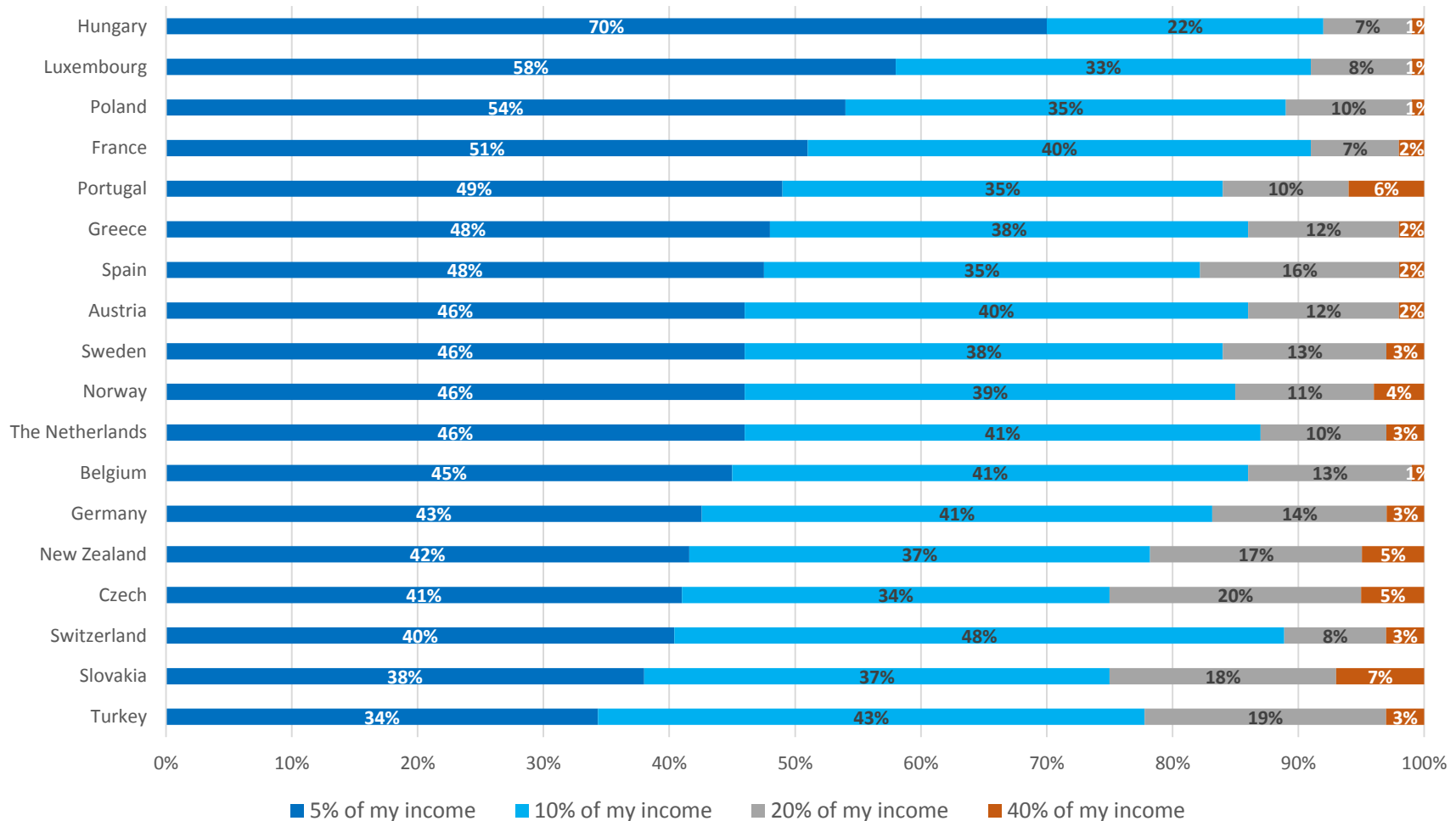
most Dutch, Danish and Spanish employees expect to retire at 65-70



Question:

- I expect to retire between age ?

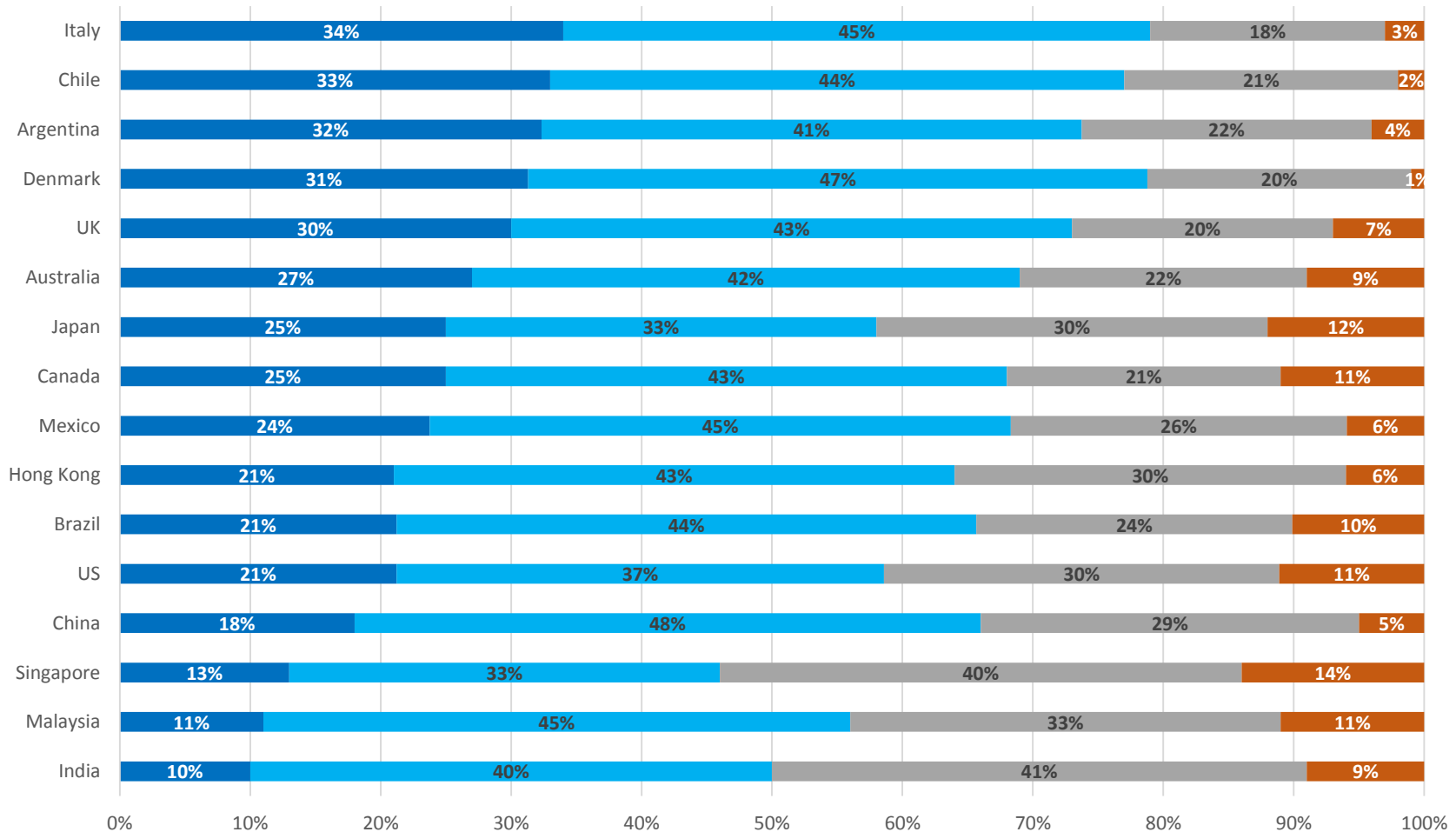
most employees are willing to save 10% or less of their income for their pension



Question:

- Living longer also means a longer period of retirement. I am prepared to save up to this amount of my income for my pension ...?

in Singapore, over 50% is willing to save 20% or more for their pension

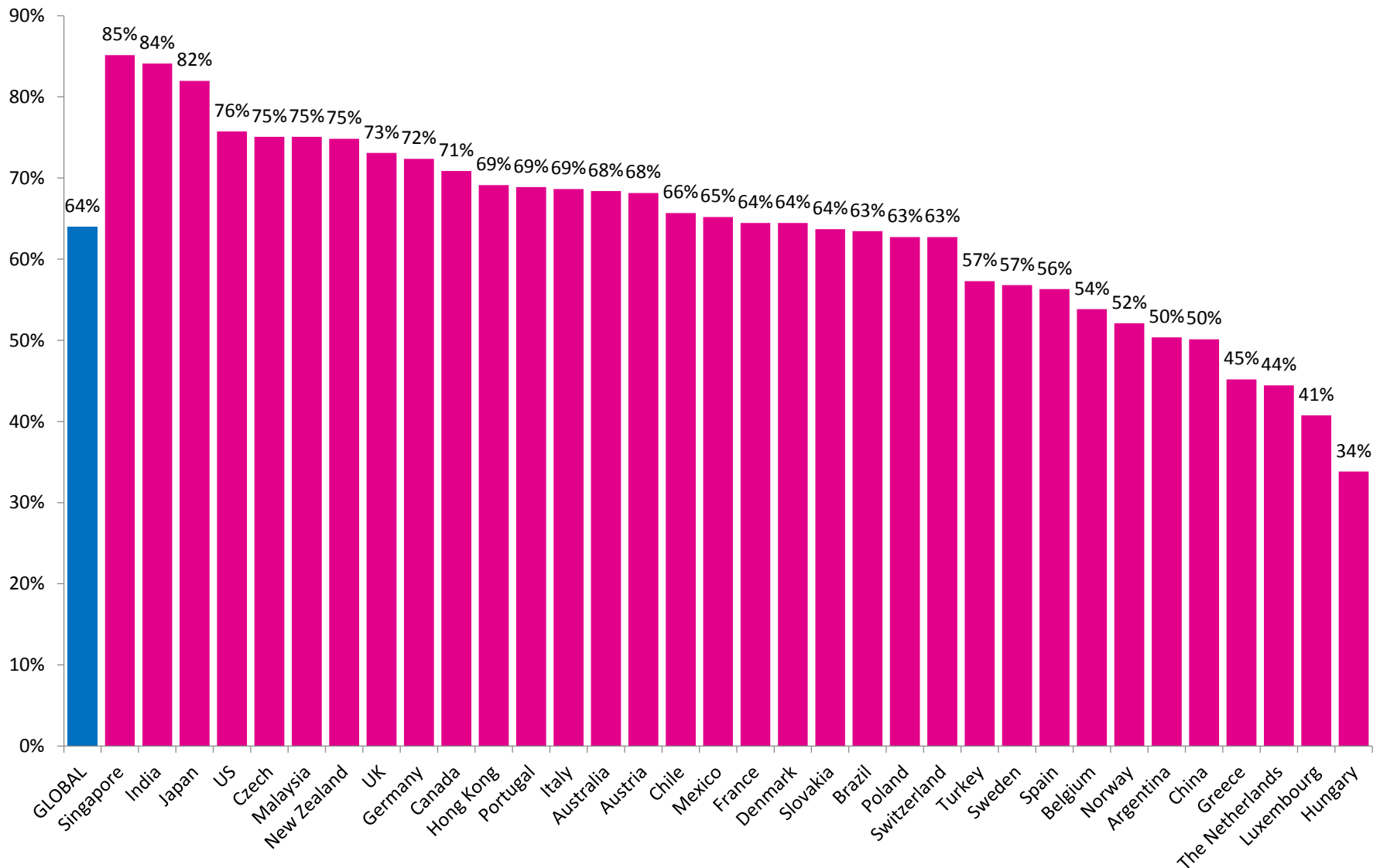


Question:

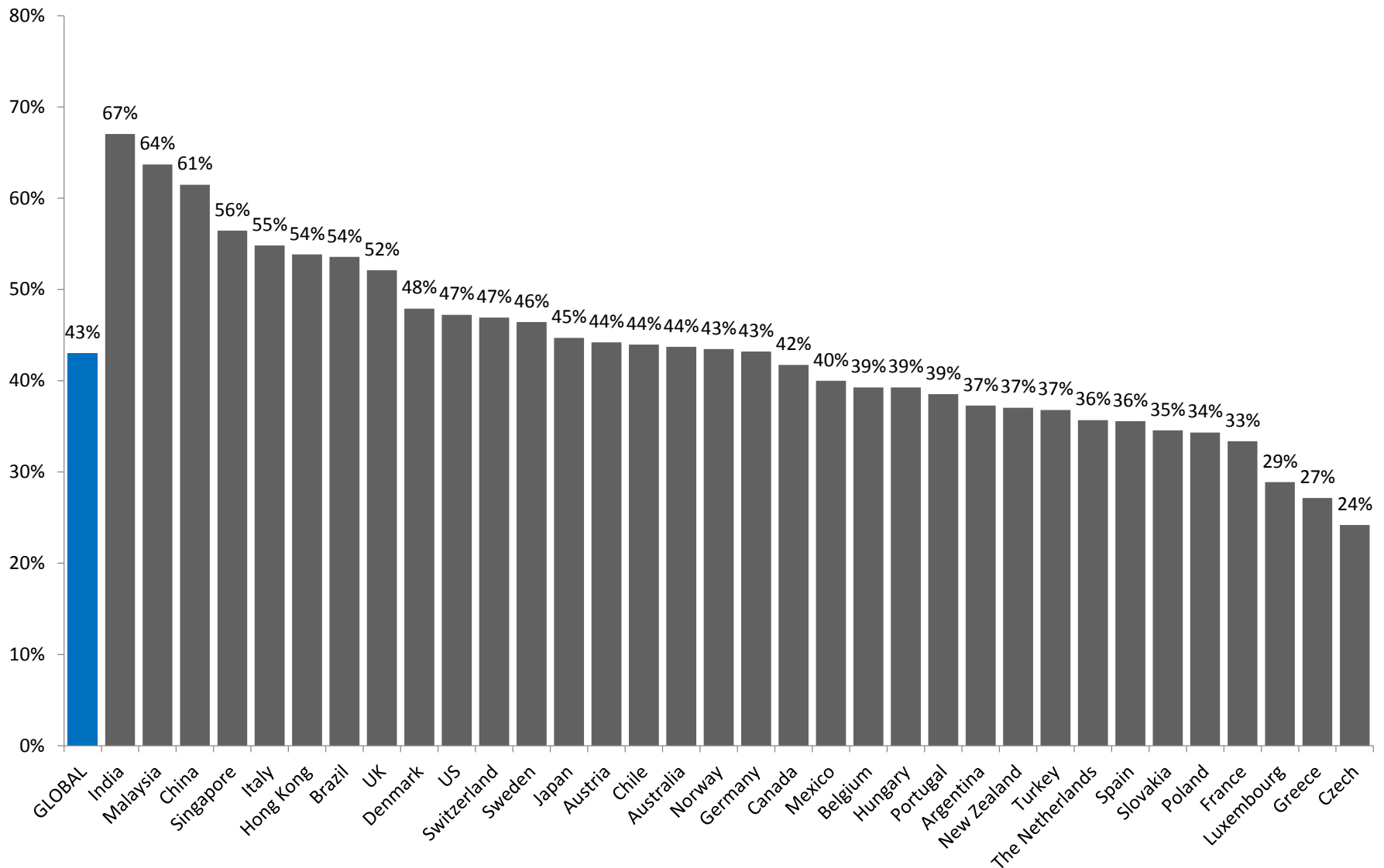
■ 5% of my income ■ 10% of my income ■ 20% of my income ■ 40% of my income

• Living longer also means a longer period of retirement. I am prepared to save up to this amount of my income for my pension ...?

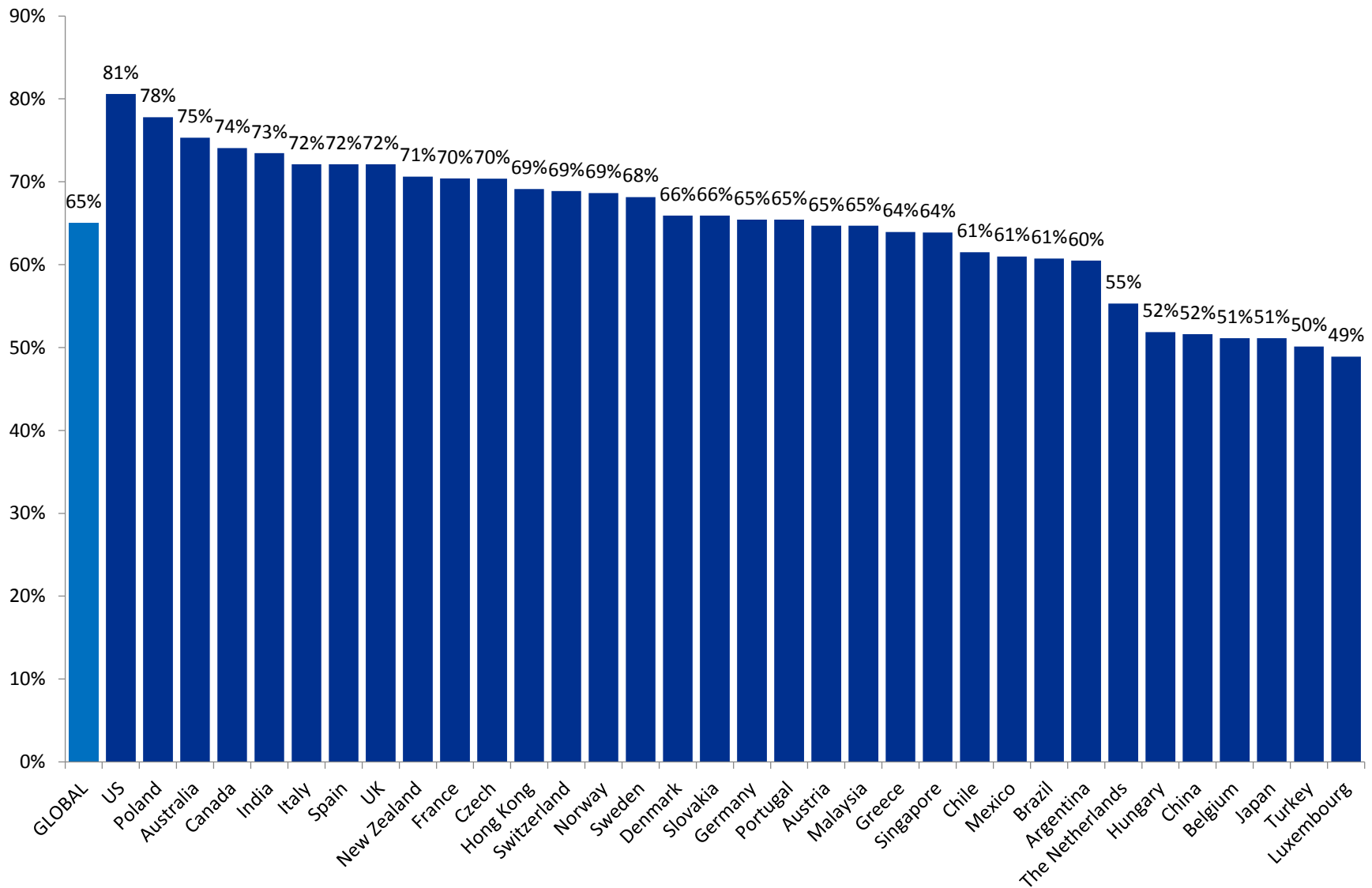
64% agree that saving for a pension is your own responsibility, not your employer's



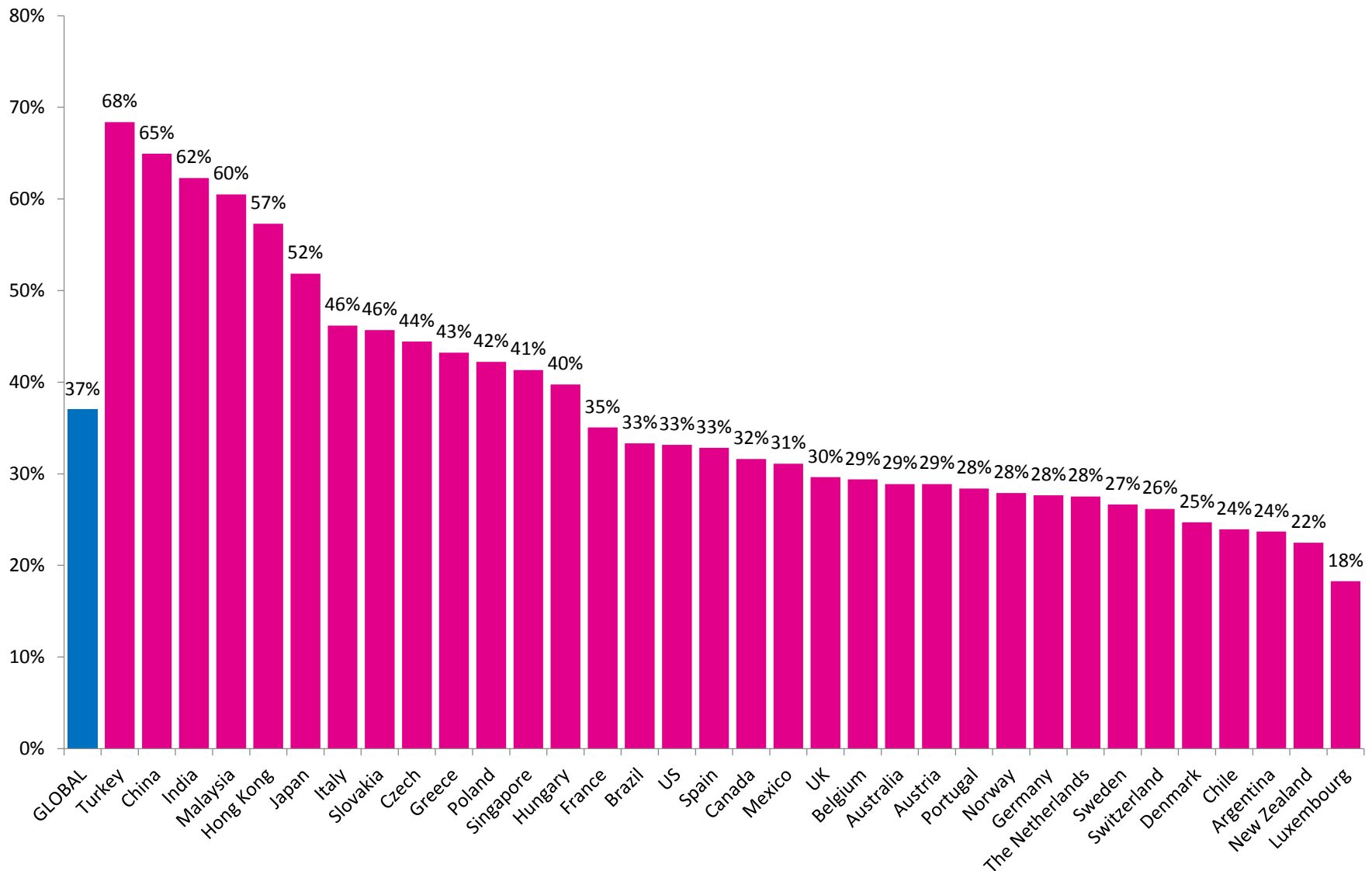
43% of employers have active policies in place to attract and retain people aged 55 and above



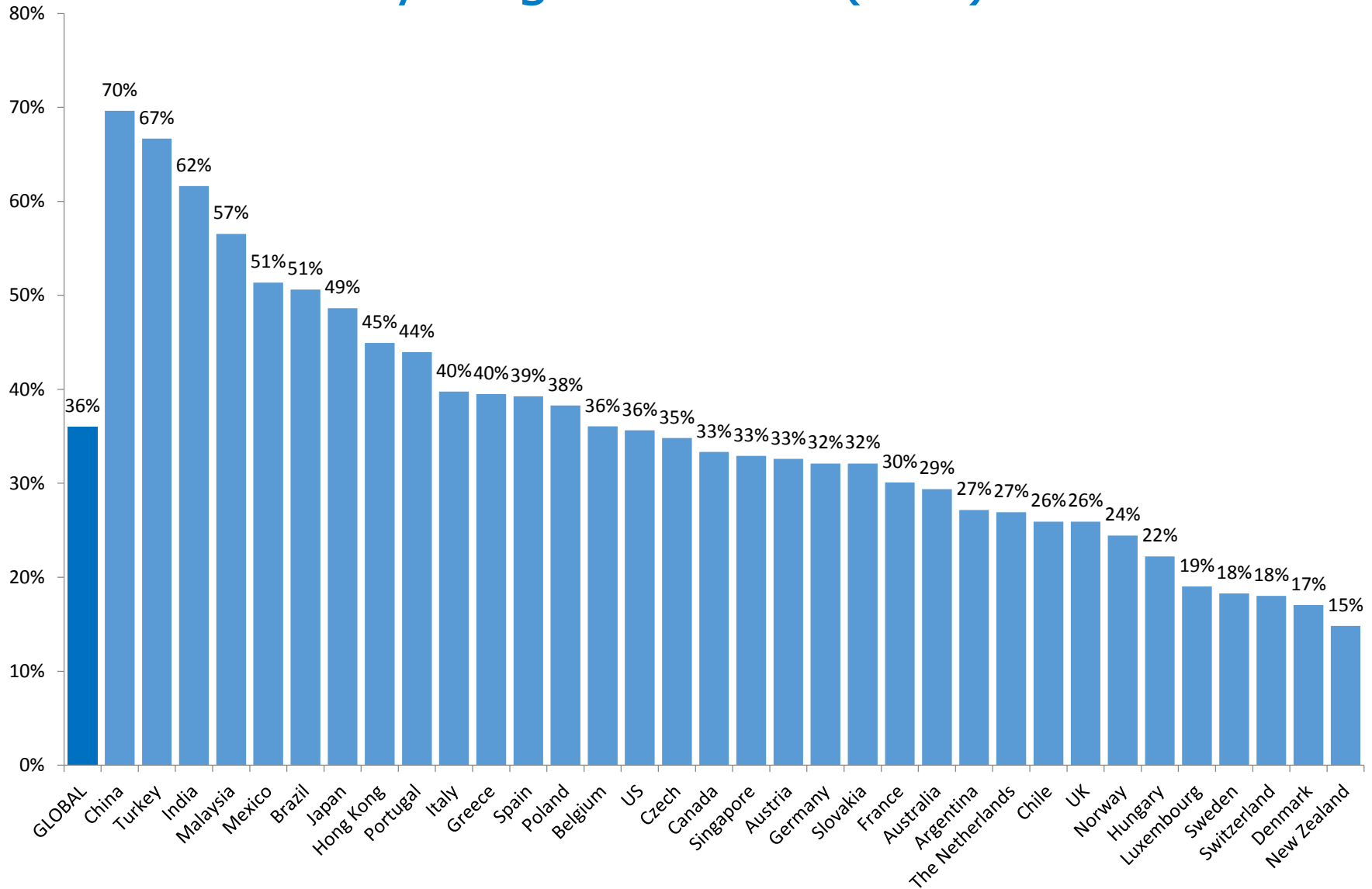
65% say that workers aged 55 and above should work comparable hours like younger generations



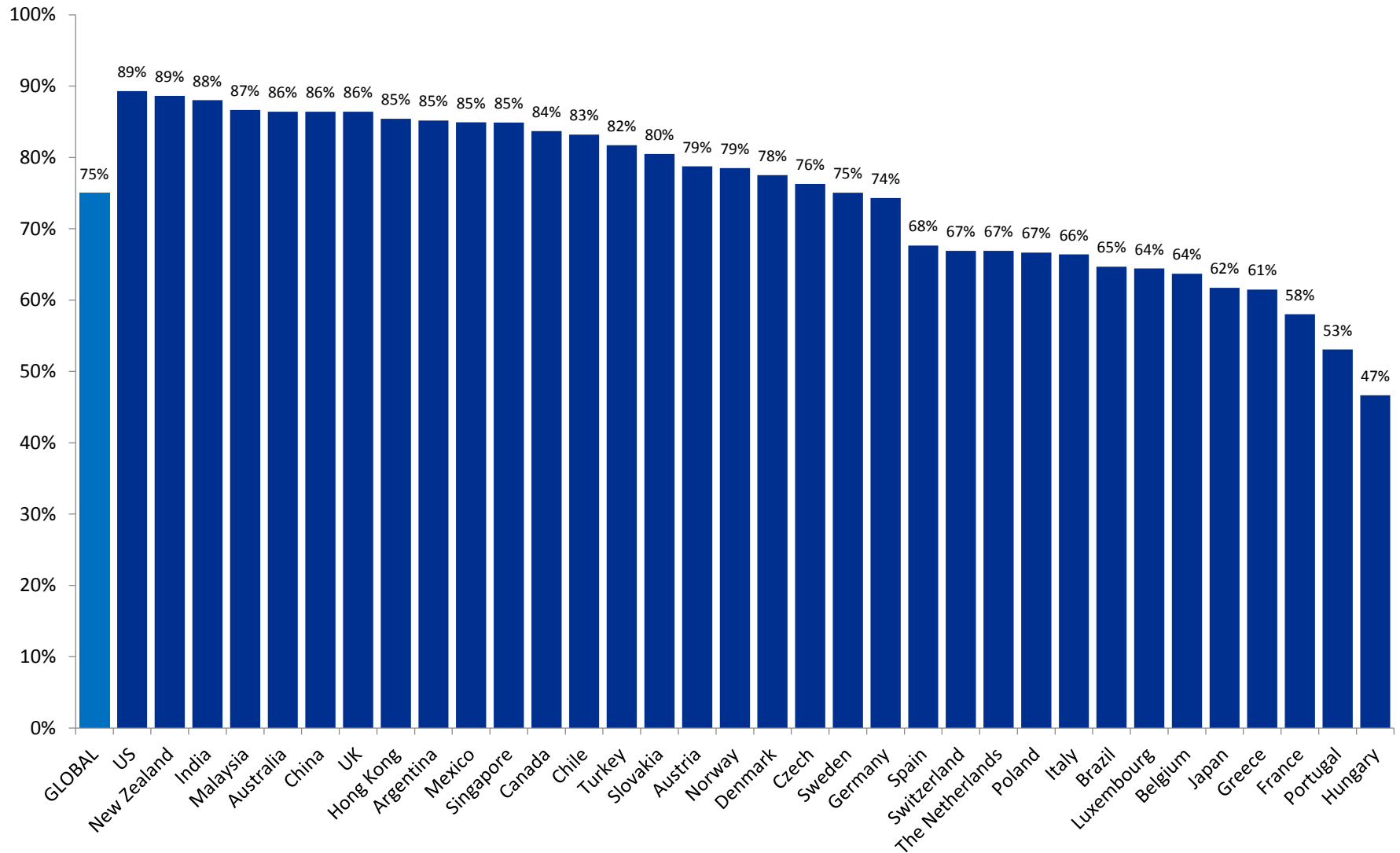
37% believe that workers aged 55 and above are less productive than workers aged 35 and younger



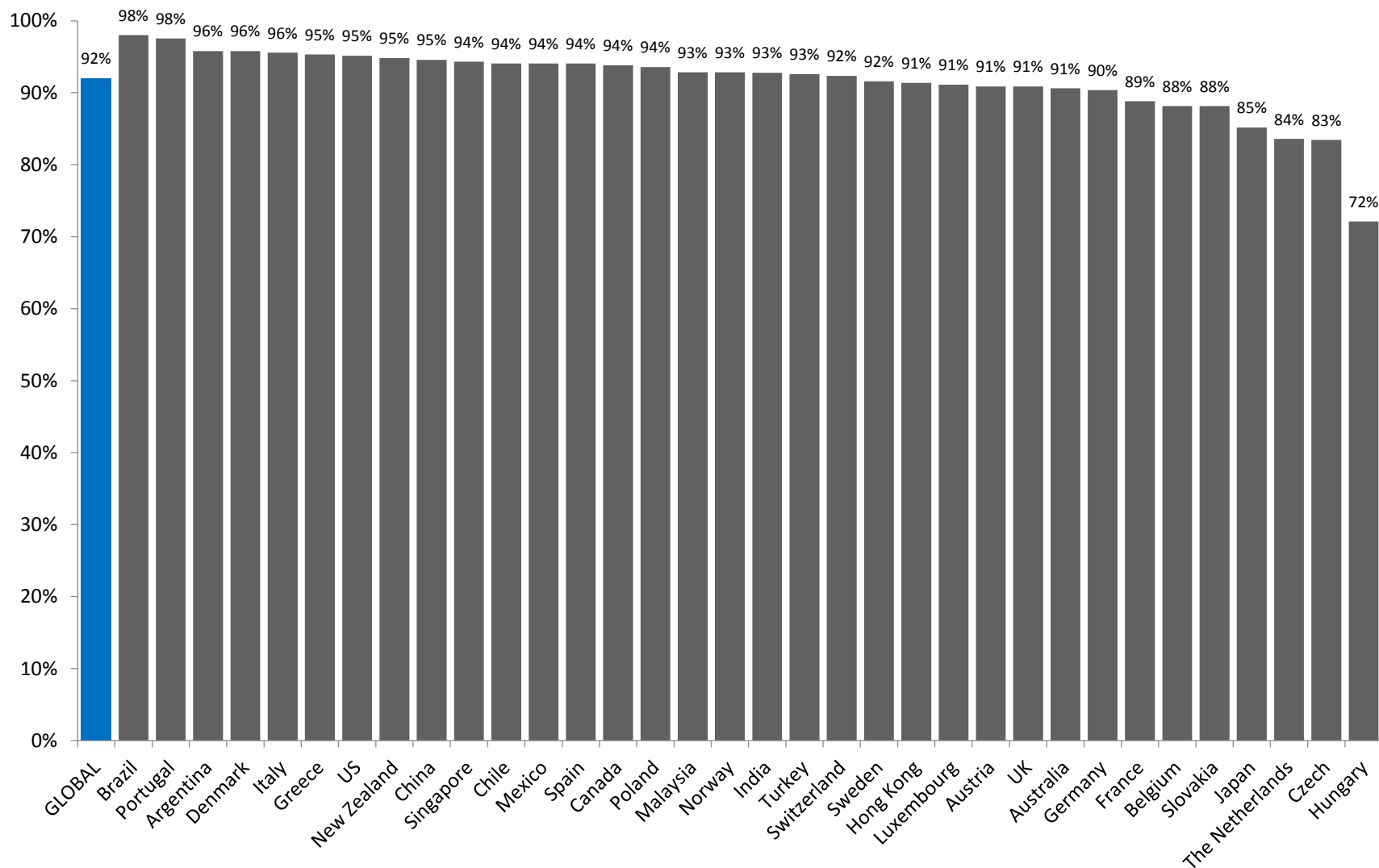
36% believe that older workers (>55) take more sick leave than younger workers (<35)



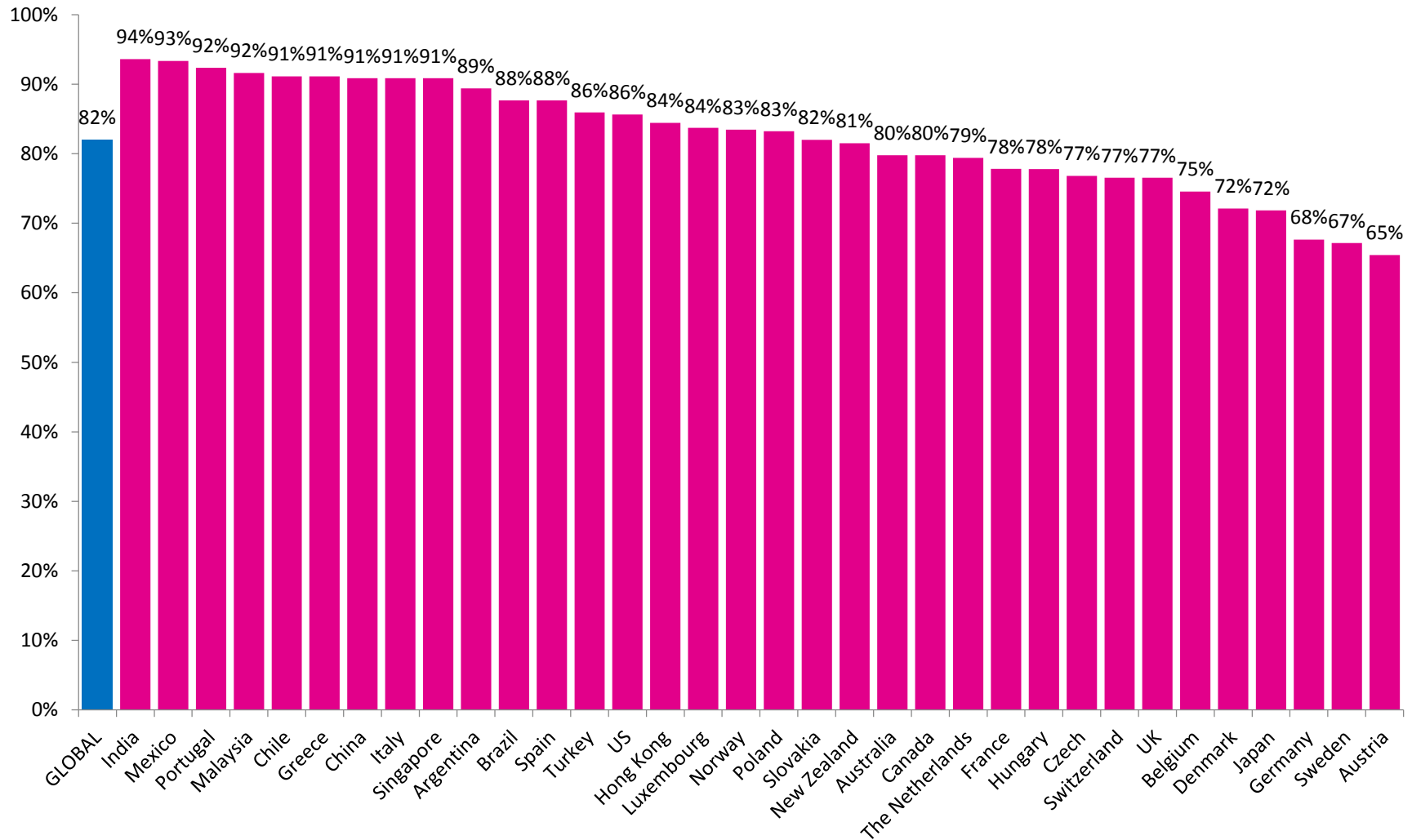
75% agree that employability is your own responsibility, not your employer's



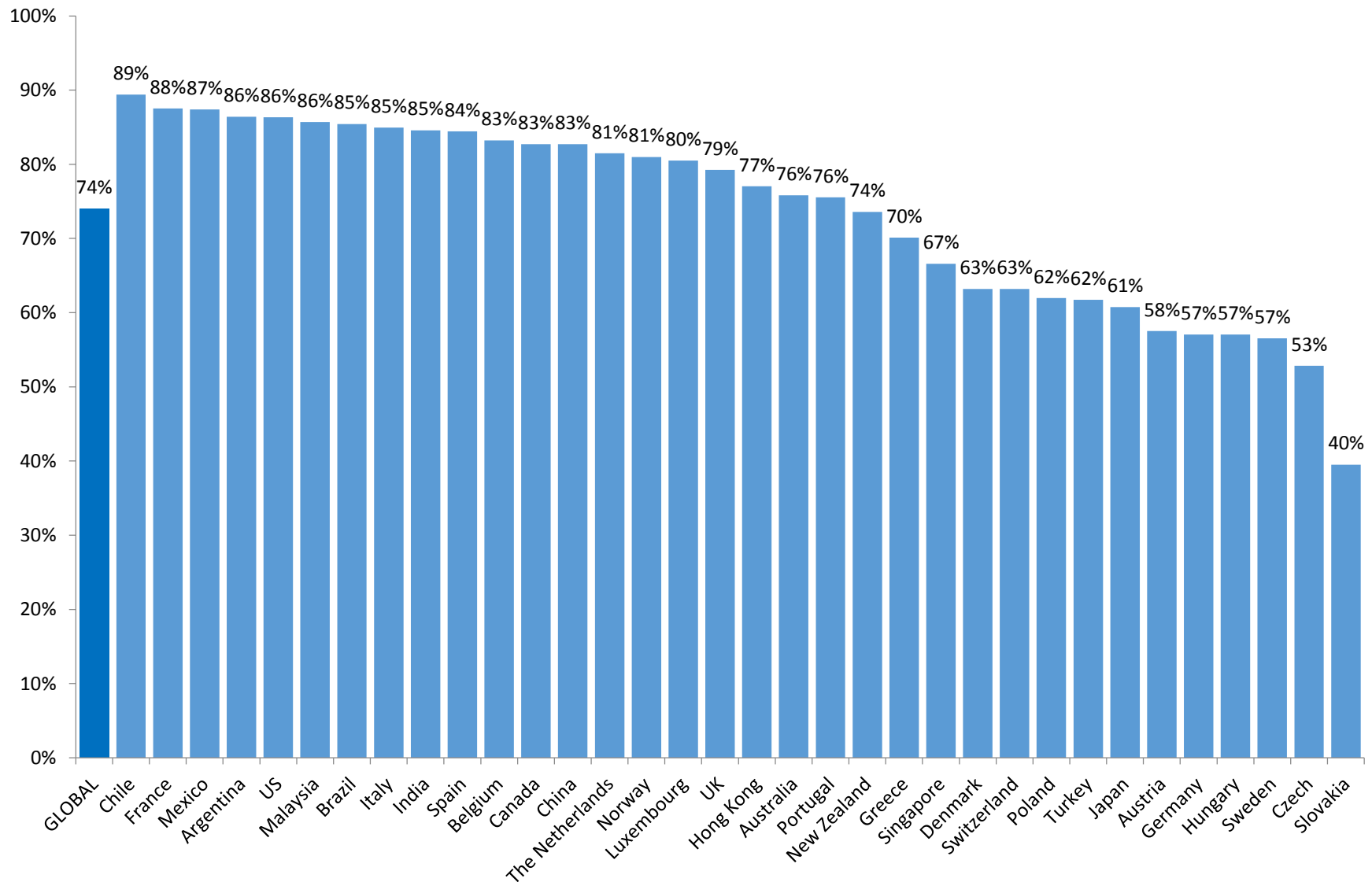
92% believe in life-long learning regardless of age



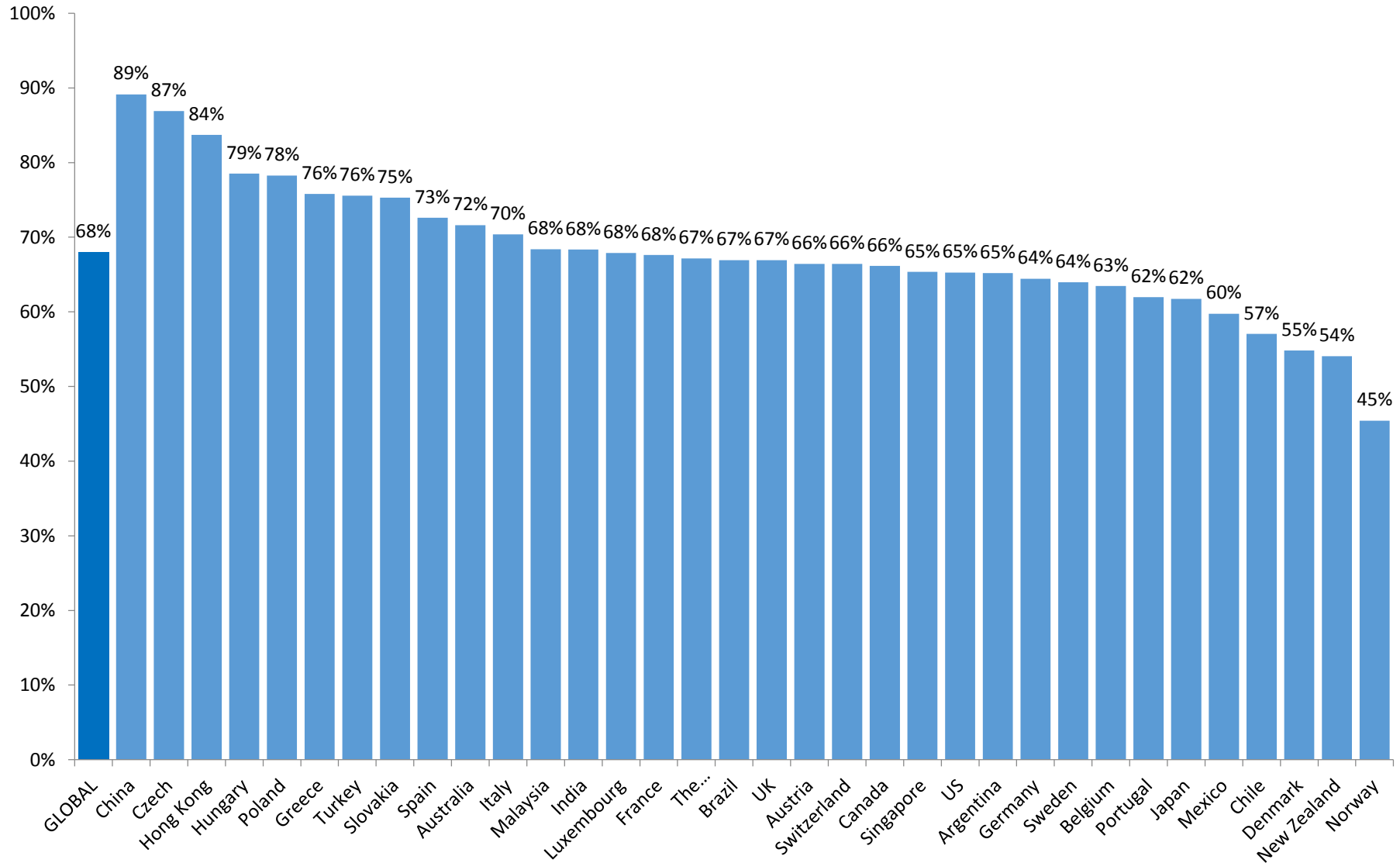
82% believe in refreshing skills & competencies every five years to enhance employability



74% say acquired skills and competences will last an entire career

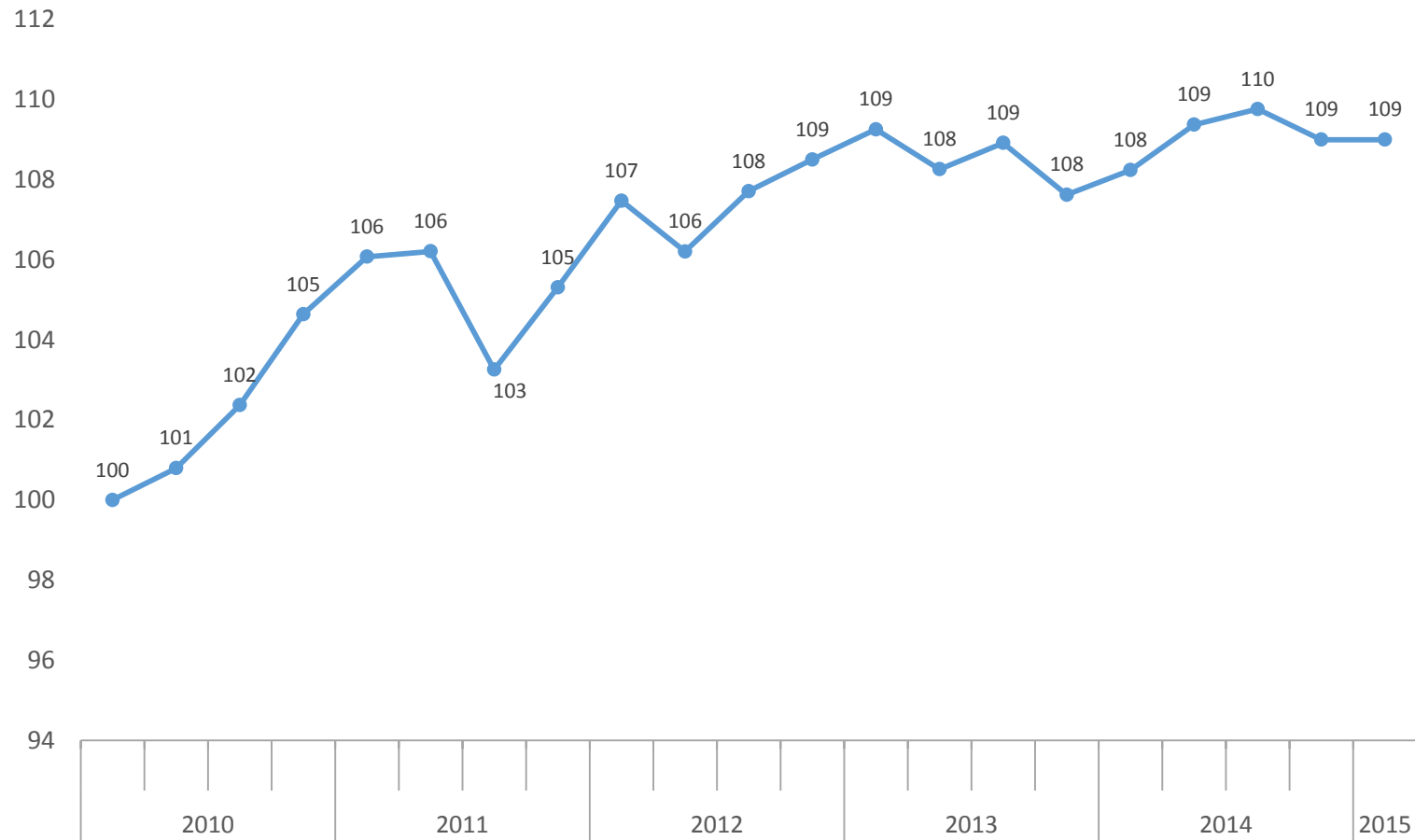


68% believe it is harder to acquire new skills for workers aged 55 and above



MOBILITY INDEX

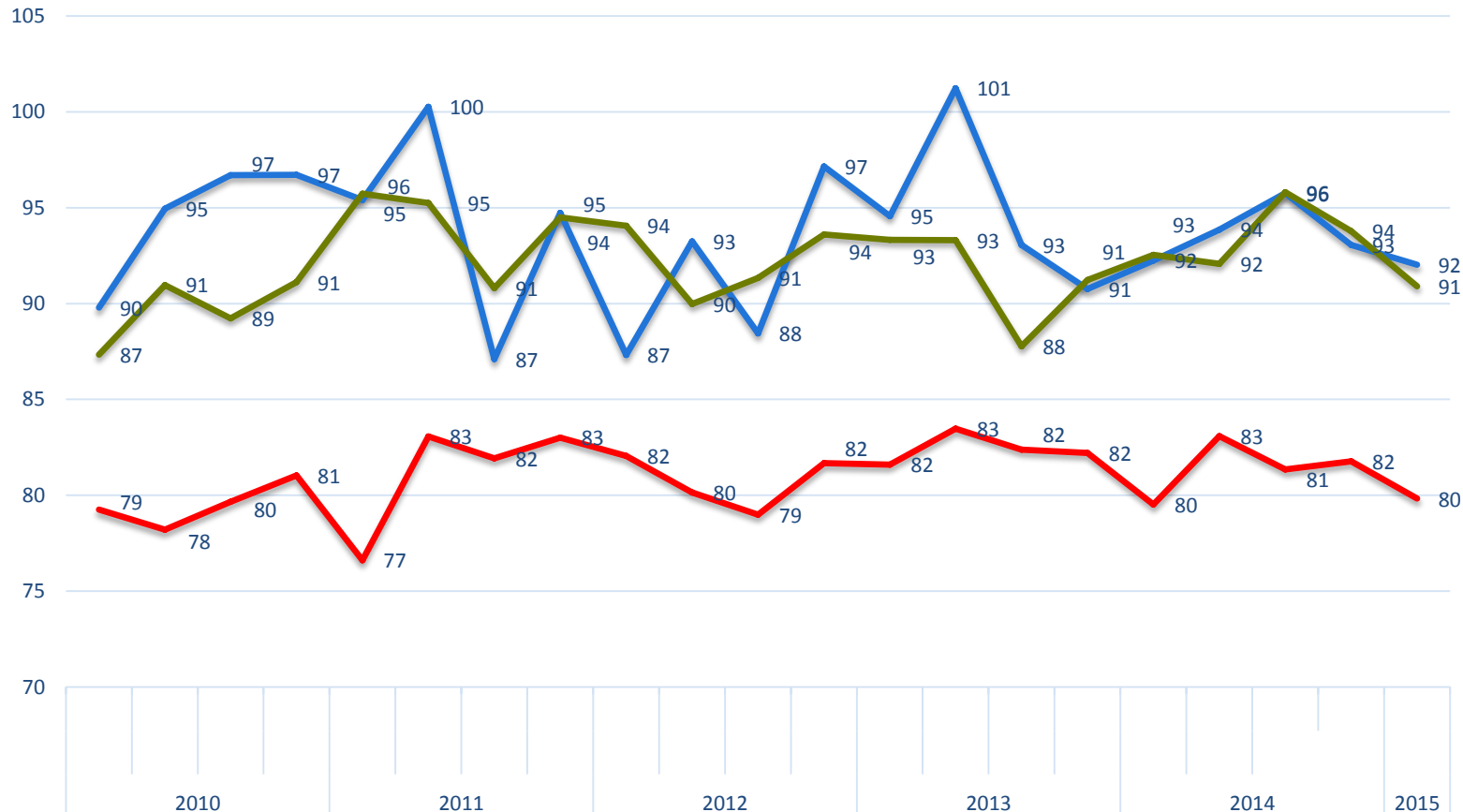
global Mobility Index steady at 109



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 in NL (-3), Belgium (-1) and Luxembourg (-2) declines

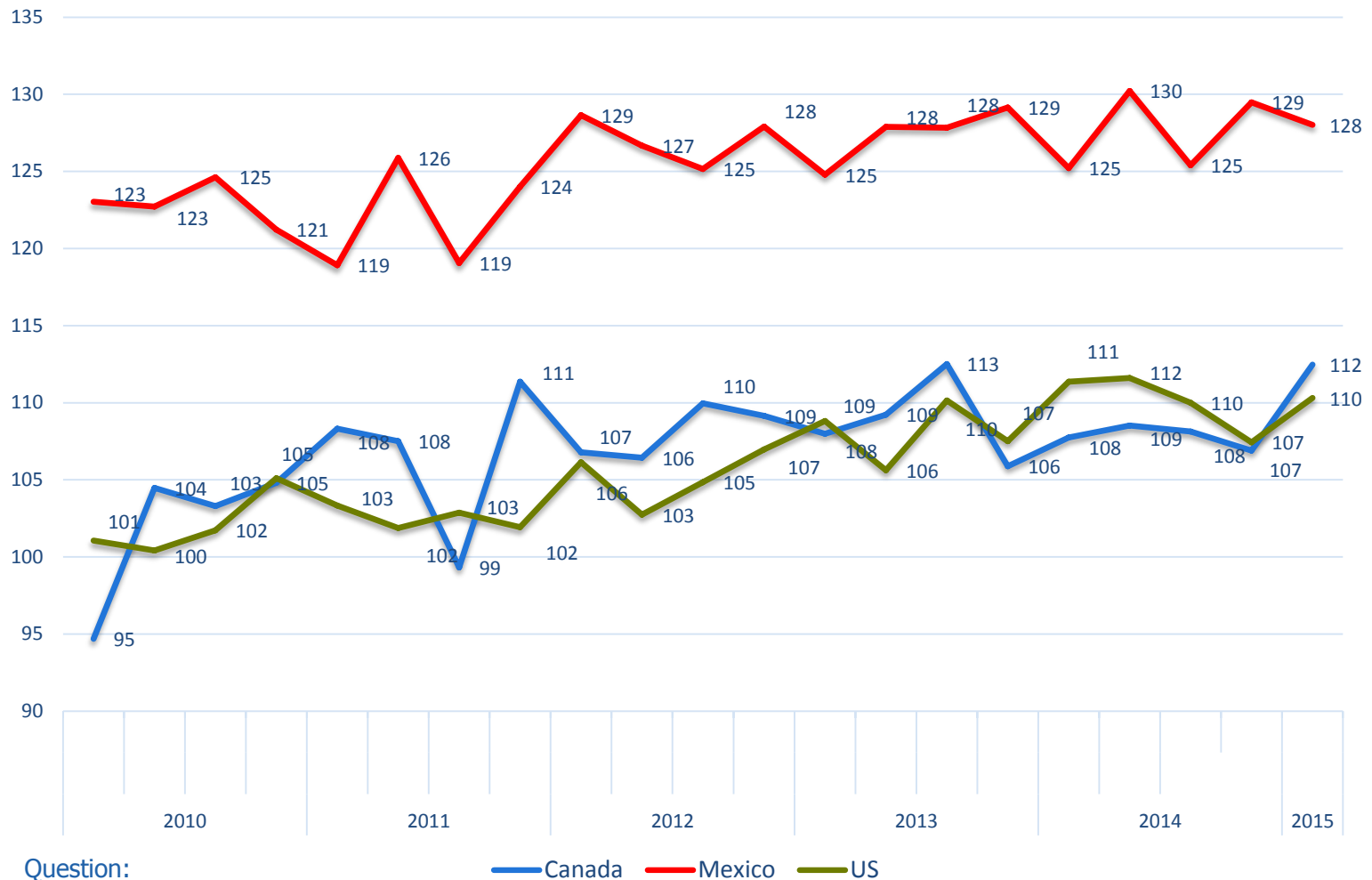


Question:

— 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?

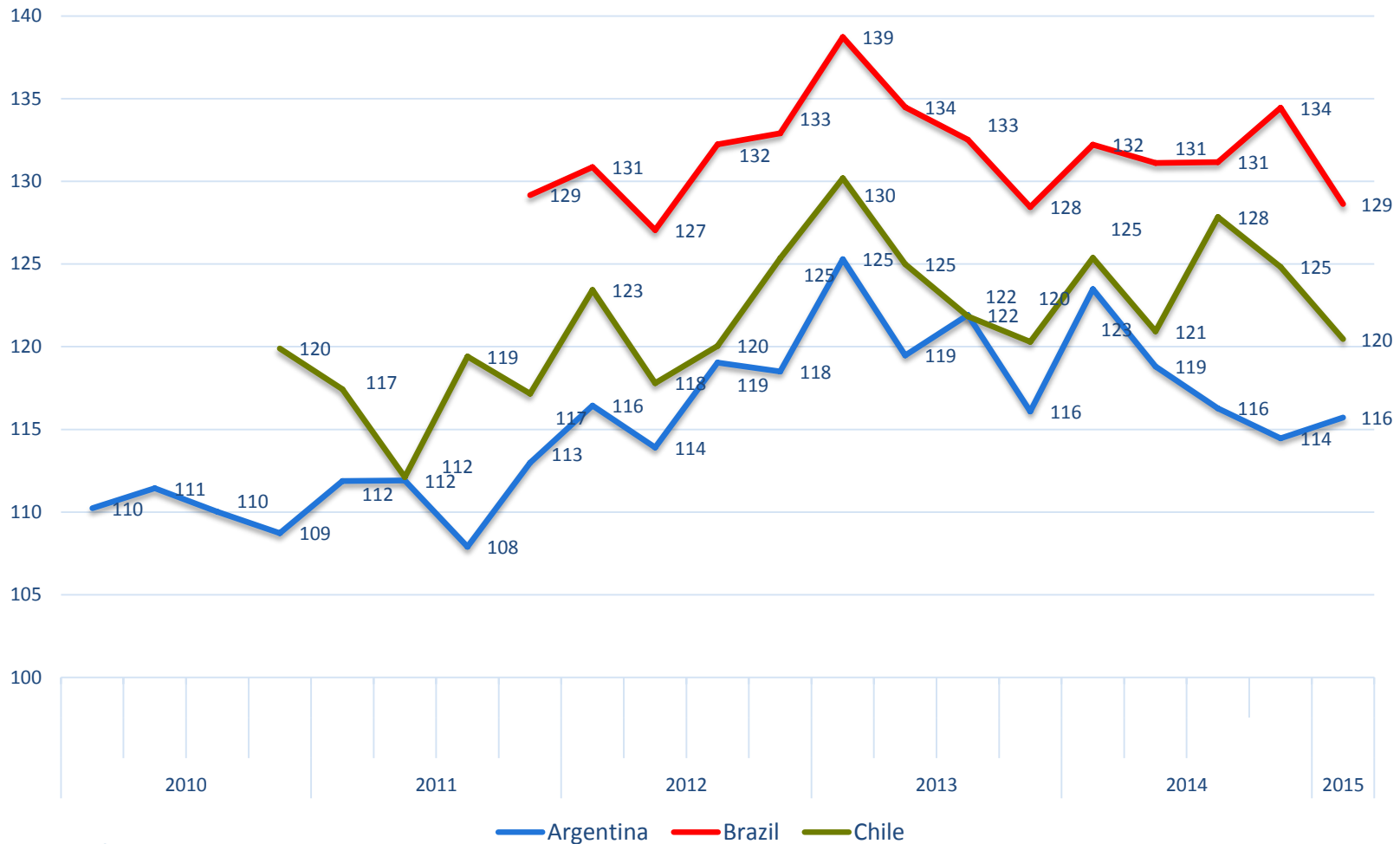
mobility increased in US (+3) and Canada (+5); slightly down in Mexico (-1)



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?

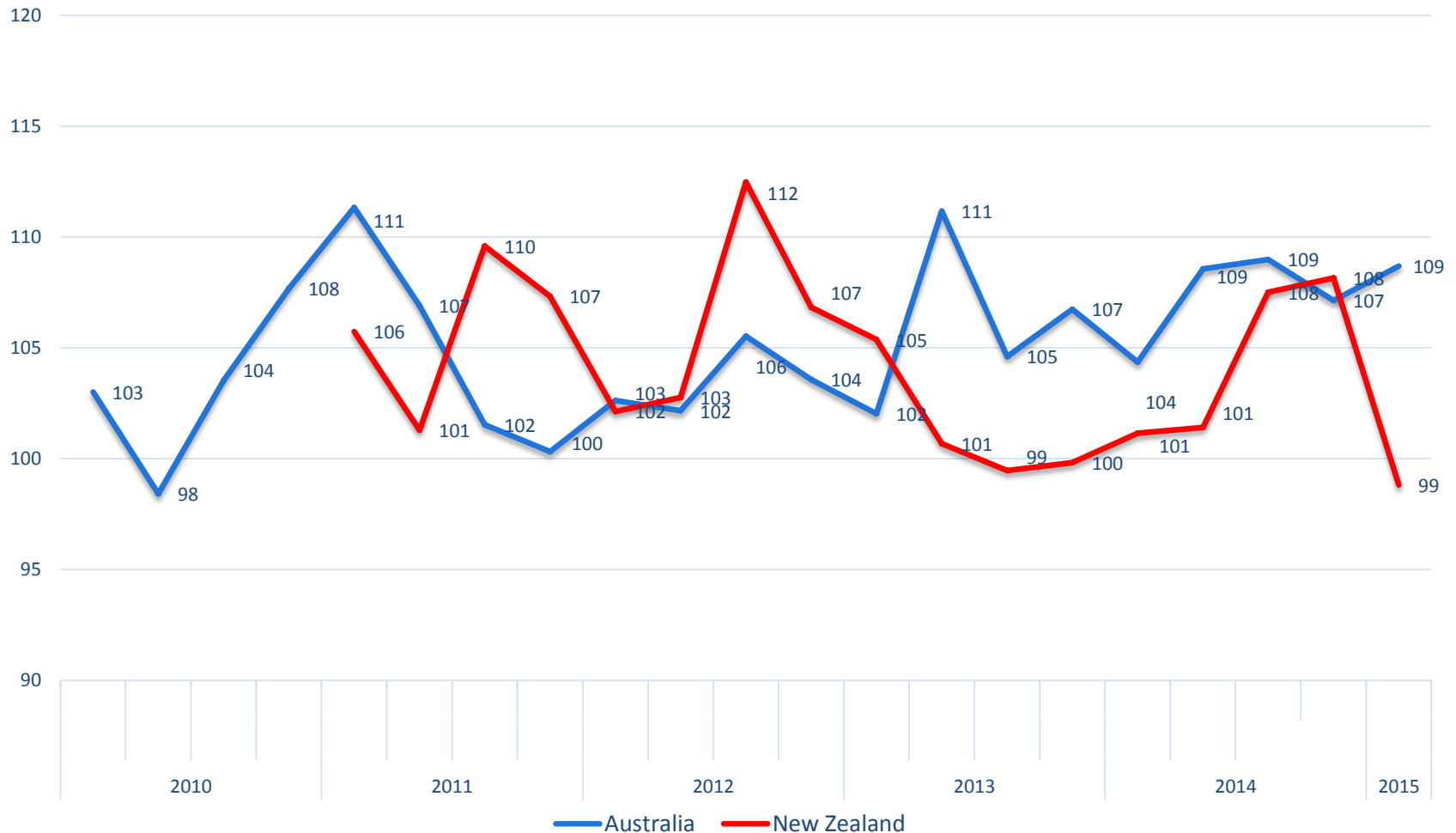
mobility up in Argentina (+2); a drop in Chile and Argentina (both -5)



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?

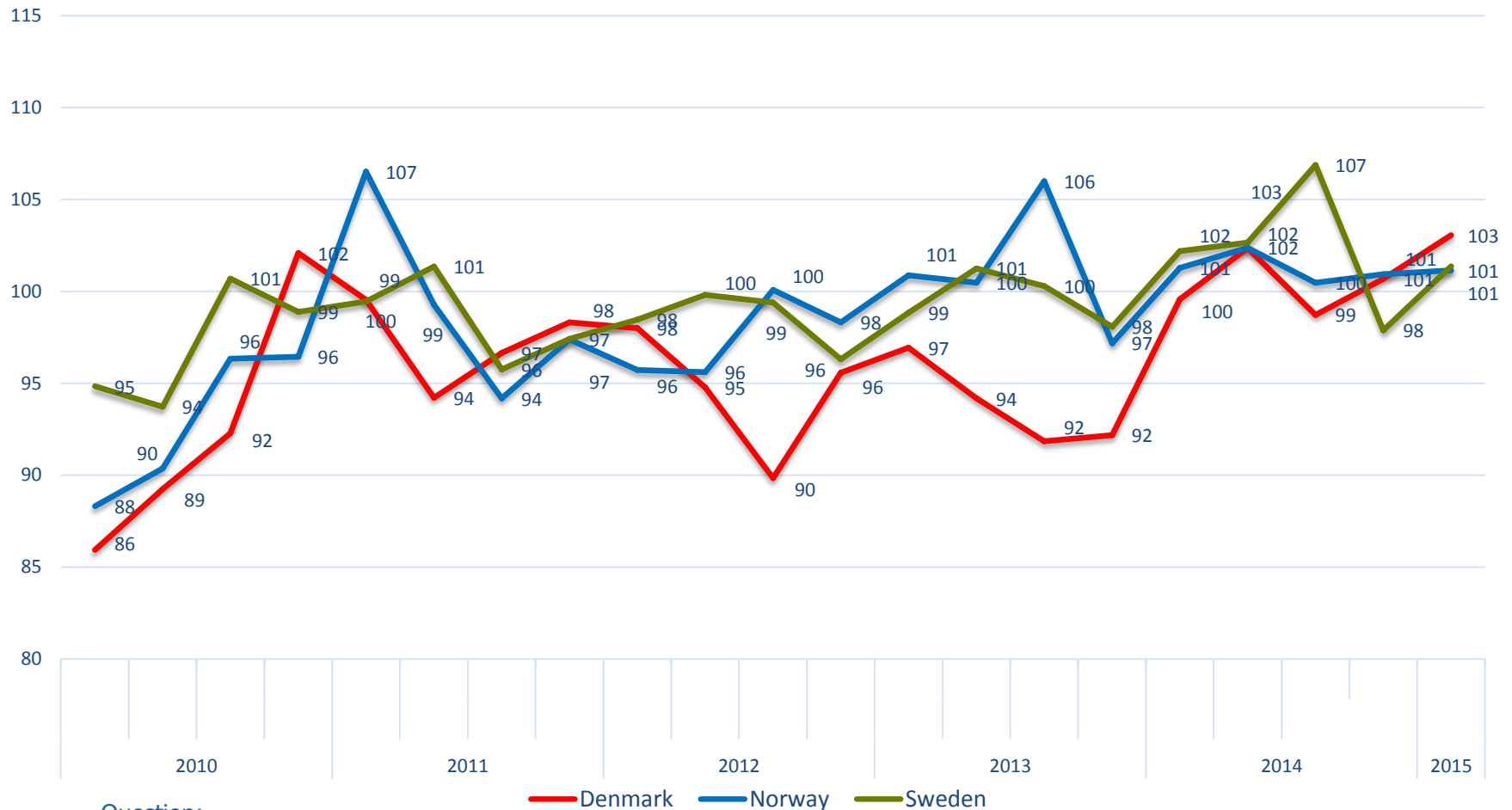
mobility drops significantly in New Zealand (-9); Australia shows a slight increase (+2)



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?

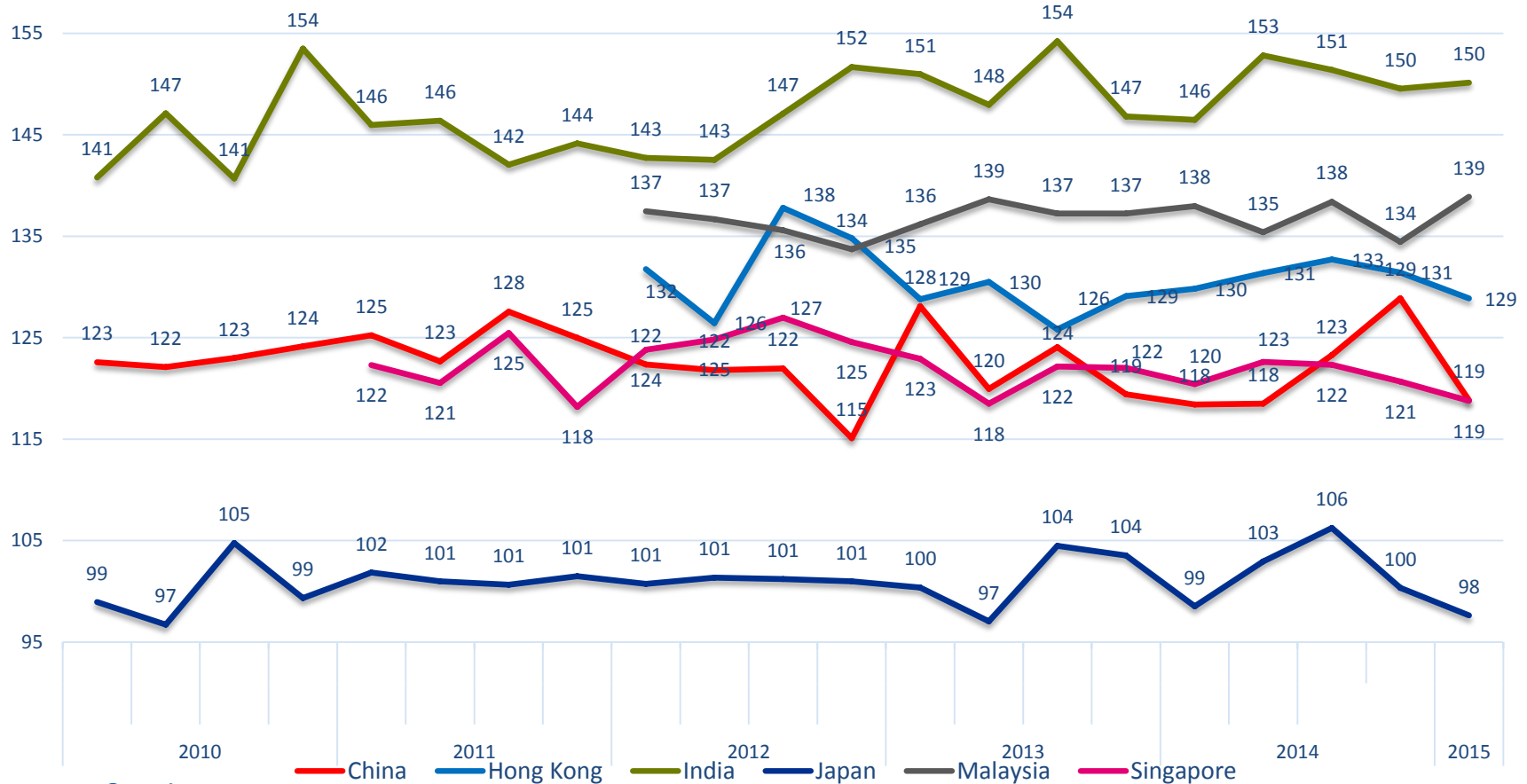
mobility slightly up in Sweden (+3) and Denmark (+2); Norway flat compared to end 2014



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?

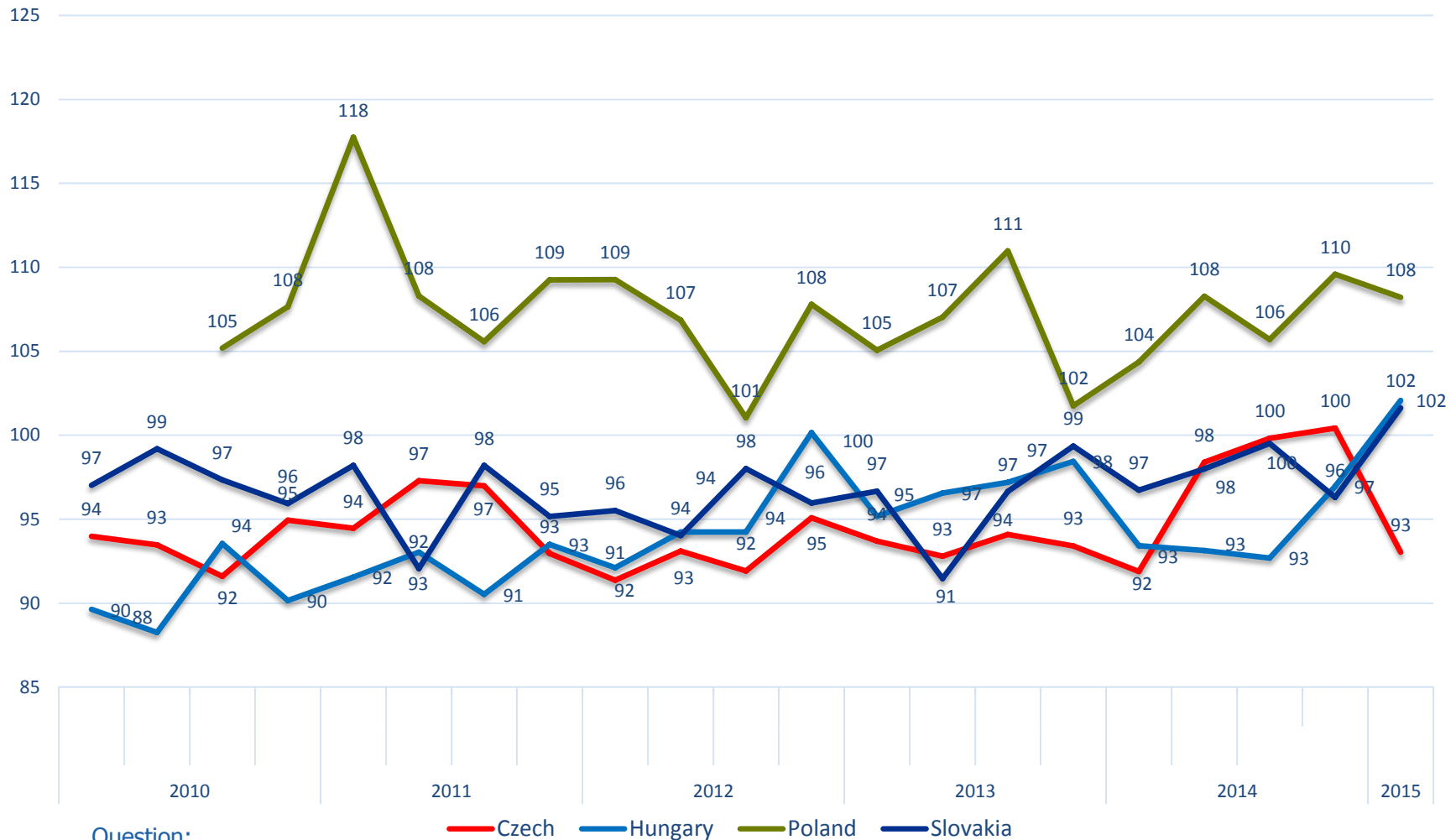
mobility up in Malaysia (+5); big dip in China (-10); slightly down in Hong Kong, Singapore and Japan (all -2); India flat



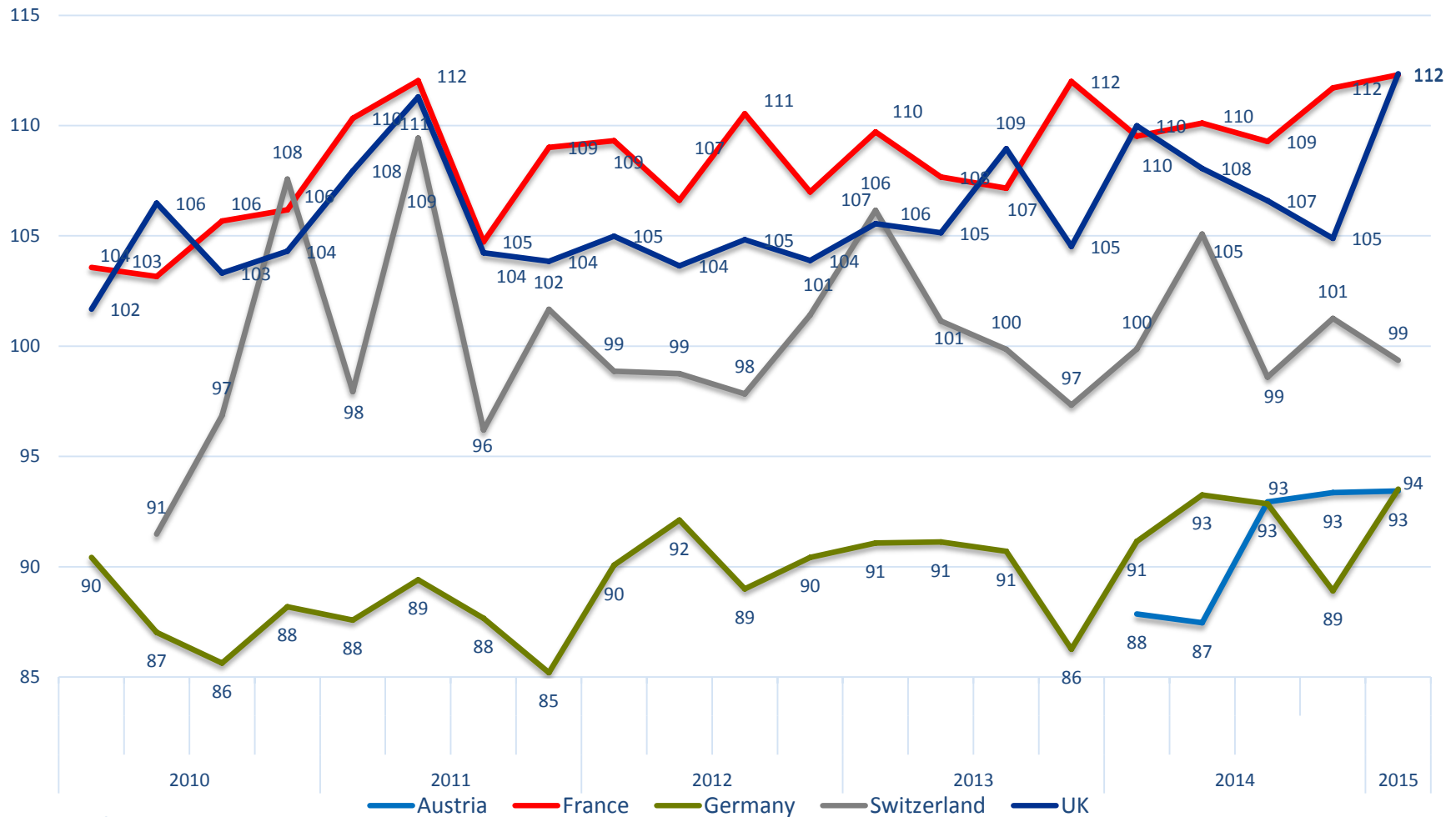
Question:

- 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 up in Slovakia (+6) and Hungary (+5); down in Czech Republic (-7) and Poland (-2)



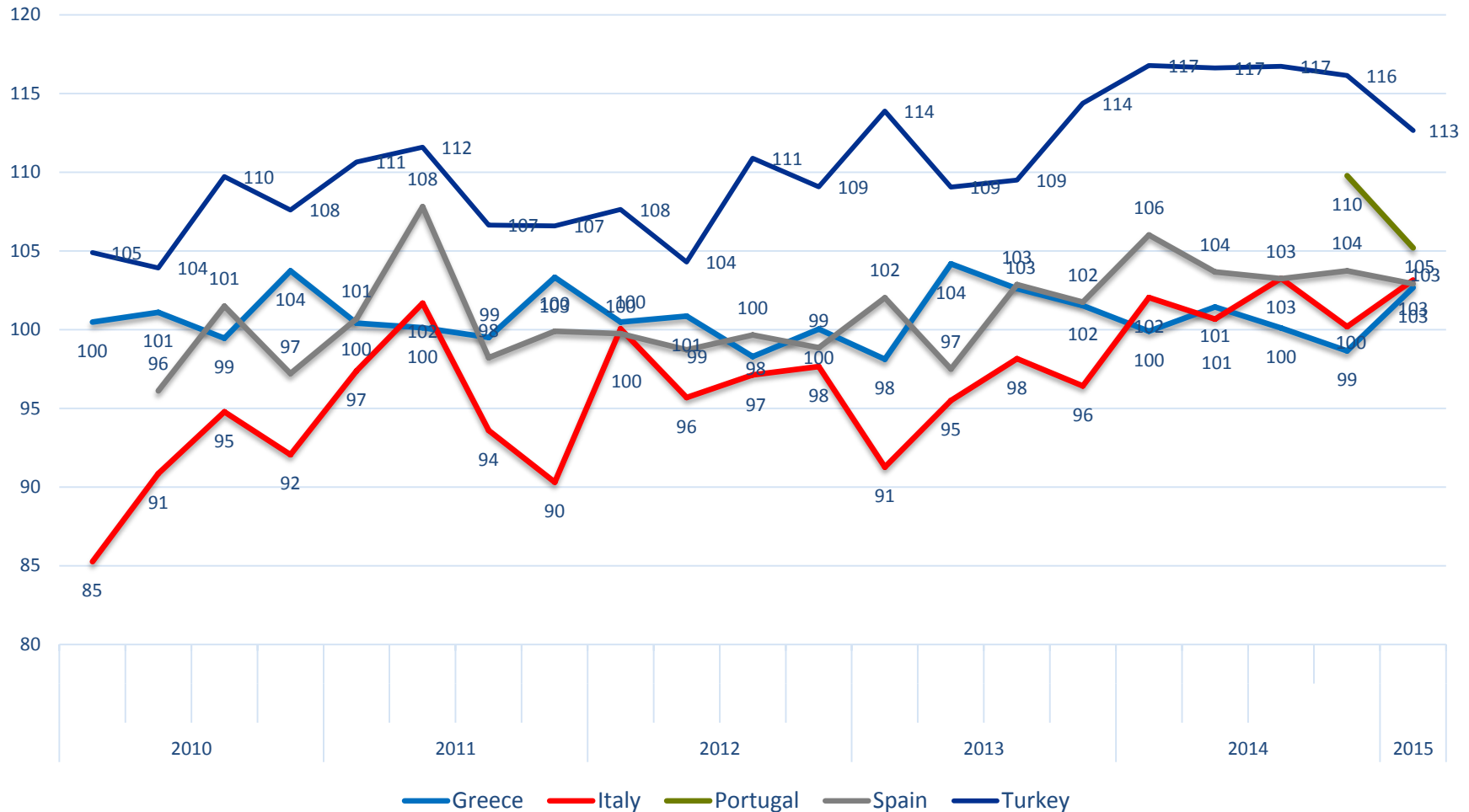
mobility jump UK (+7) and Germany (+5); slightly down in Switzerland (-2); Austria and France flat



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 down in Portugal (-5), Turkey (-3) and Spain (-1); Greece (+1) and Italy up (+3)

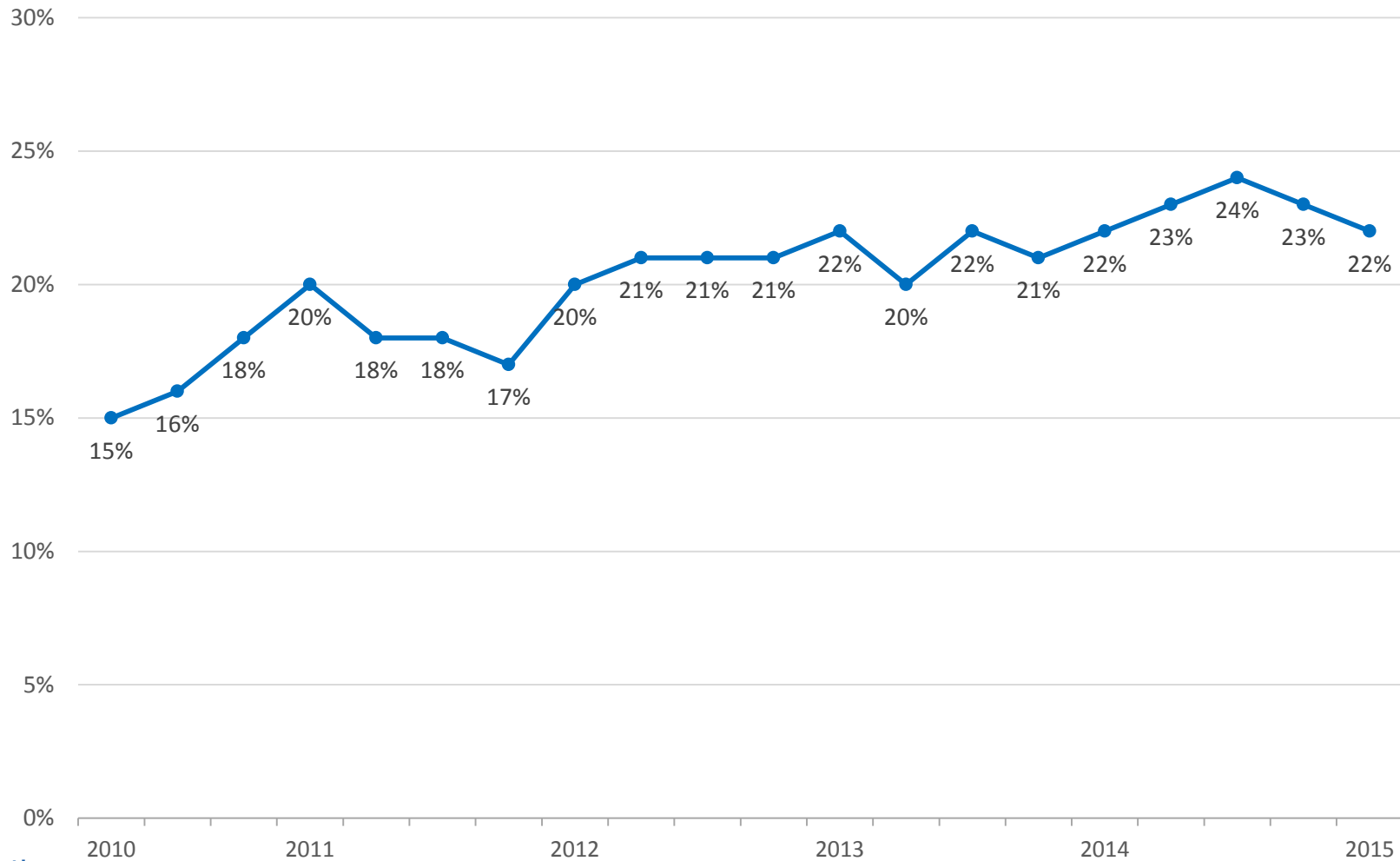


Question:

- 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?

ACTUAL JOB CHANGE

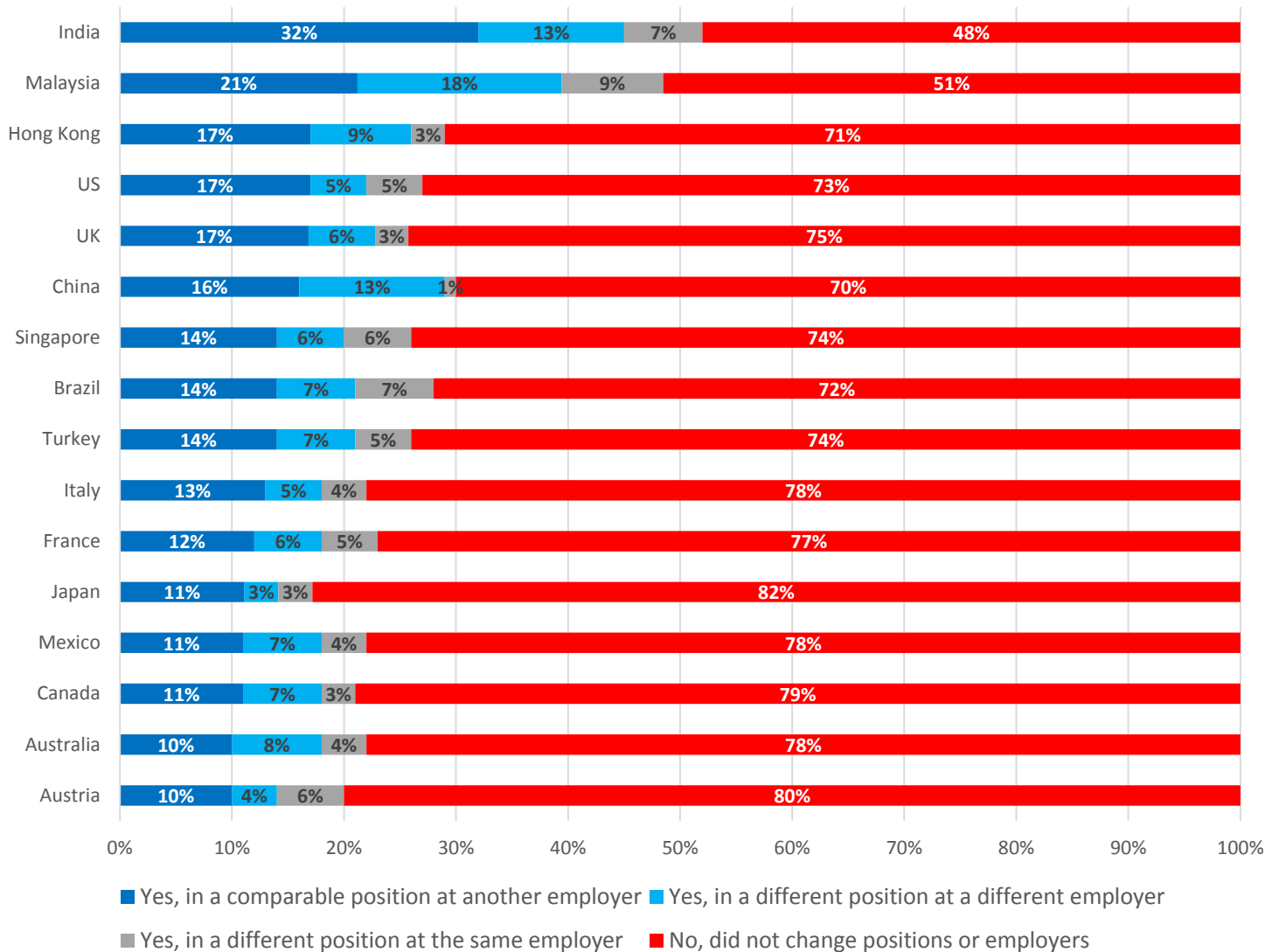
actual job change at 22%



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 India and Malaysia

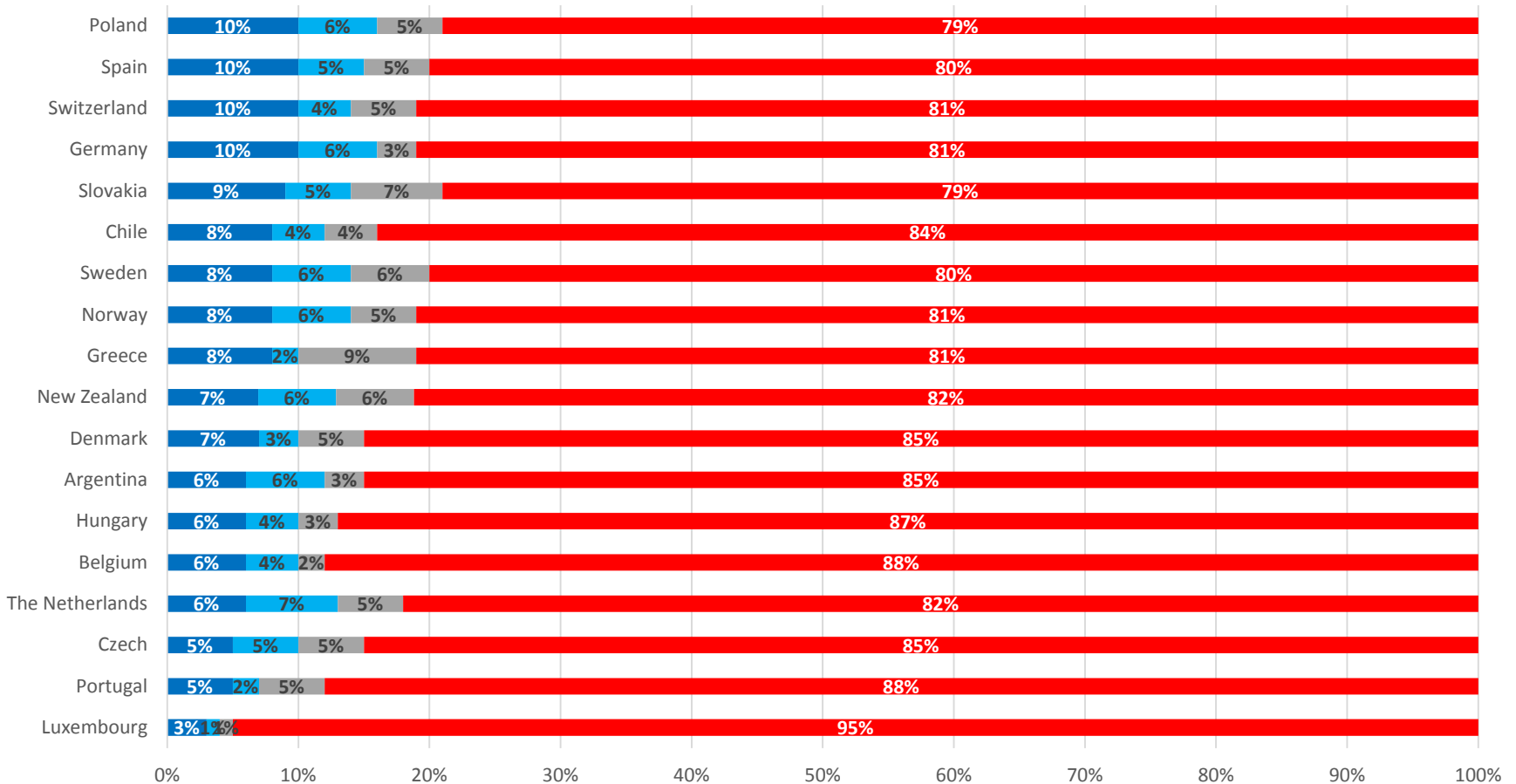


Job change dropped significantly in China and Malaysia, although it is still high compared to the rest of the world. In Brazil, Portugal, Hungary, Poland, Chile, Germany and Argentina job change slightly decreased compared to last quarter. In Slovakia there is a substantial increase in job change.

Question:

Have you changed jobs during the past six months?

actual job change lowest in Belgium and Luxembourg



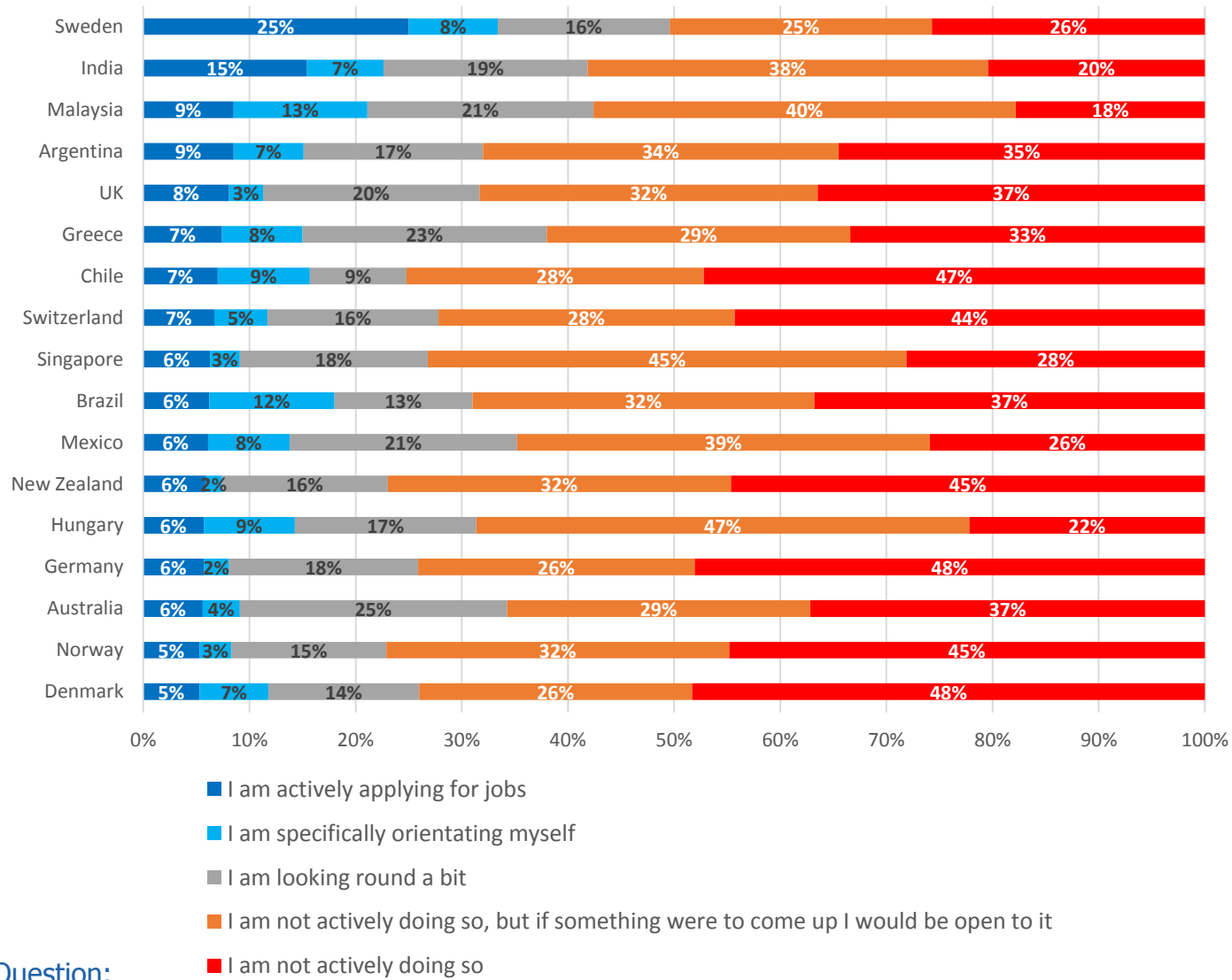
- Yes, I currently work in a comparable position at another employer
- Yes, I currently work in a different position at the same employer
- Yes, I currently work in a different position at a different employer
- No, I did not change positions or employers during the past 6 months

Question:

Have you changed jobs during the past six months?

JOB CHANGE APPETITE

Sweden and India again high appetite for job change



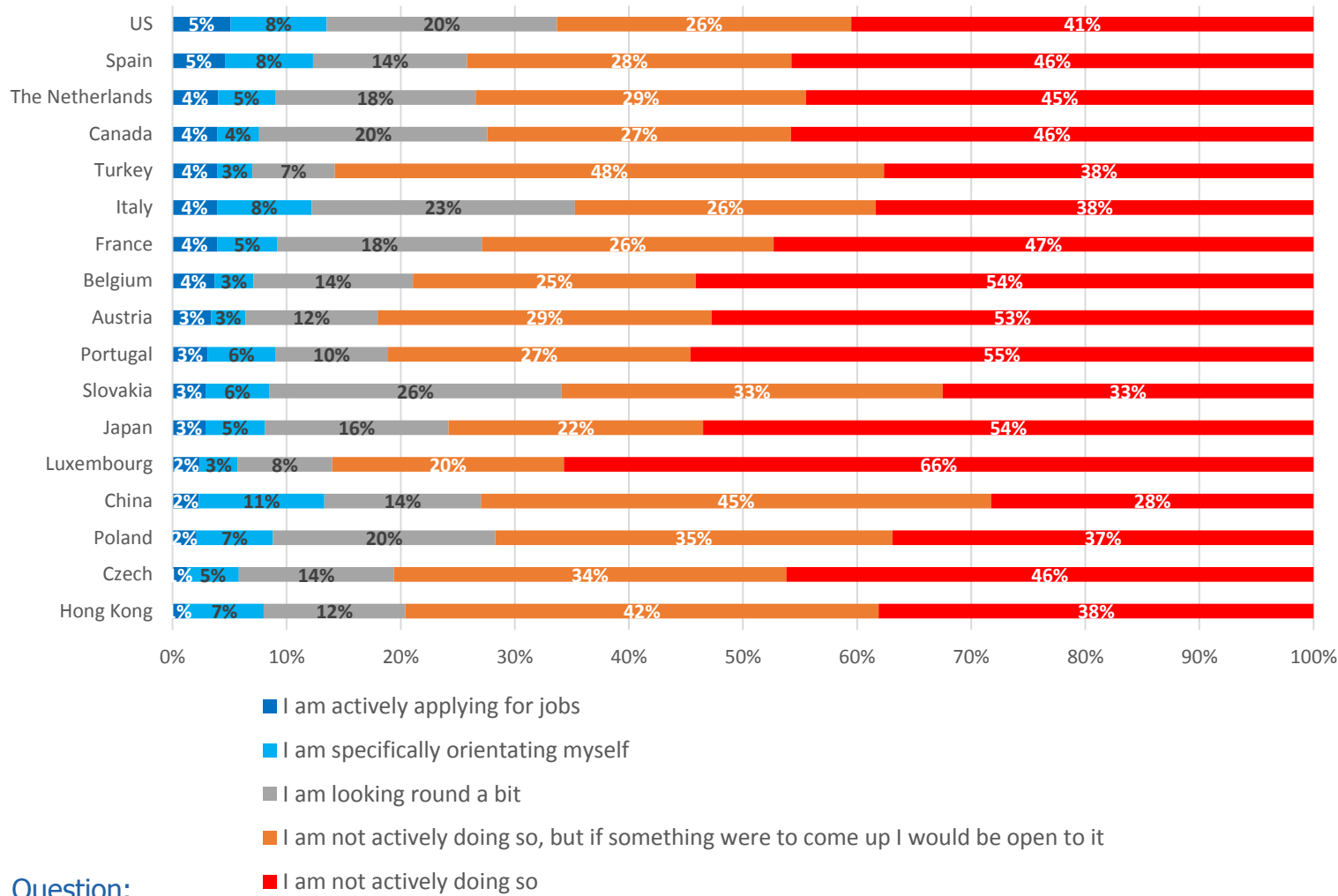
Similar to previous quarters, the appetite to switch jobs is highest in Sweden and India.

Malaysia, Sweden, Switzerland and UK show a slight increase in appetite compared to last quarter.

Question:

- To what extent are you currently looking for another job?

job change appetite (continued)

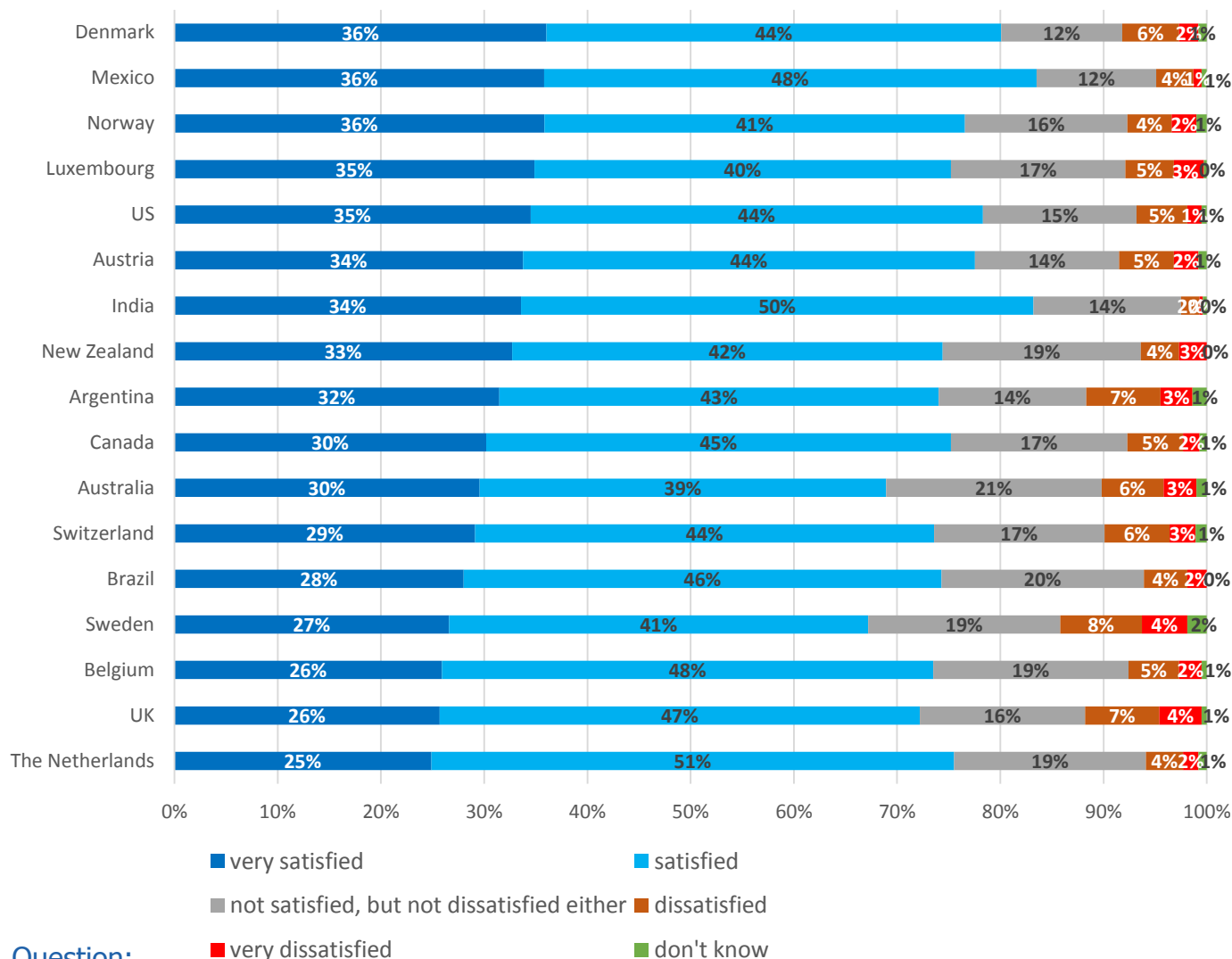


Question:

- To what extent are you currently looking for another job?

JOB SATISFACTION

job satisfaction highest in India and Mexico



Job satisfaction is high in more than half of all countries (top-2 box "very satisfied/ satisfied" is 70% or more).

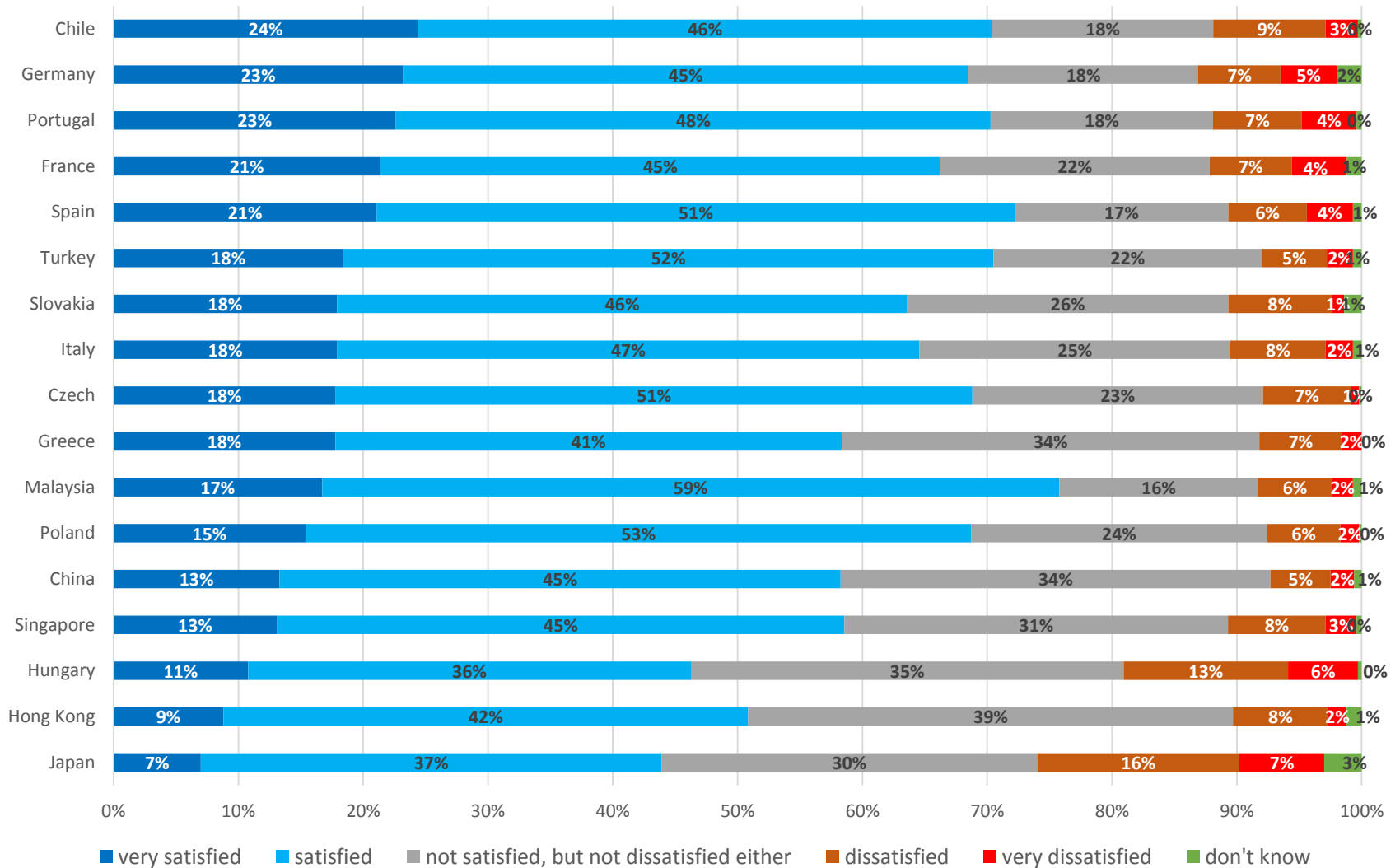
Job satisfaction increased with 5% or more compared to last quarter in New Zealand, Chile, Argentina, UK, Denmark, US, Portugal & Spain.

Job satisfaction dropped with 5% or more in Hungary, Turkey and Germany.

Question:

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

job satisfaction (continued)



Question:

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

ABOUT THE RANDSTAD WORKMONITOR

background 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 end 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 Global 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 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 1st wave of 2015 was conducted between January 21-February 5, 2015 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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