

global report

# Randstad Workmonitor 4<sup>th</sup> quarter 2015

employee outlook 2016: STEM and digital profiles high on wish lists

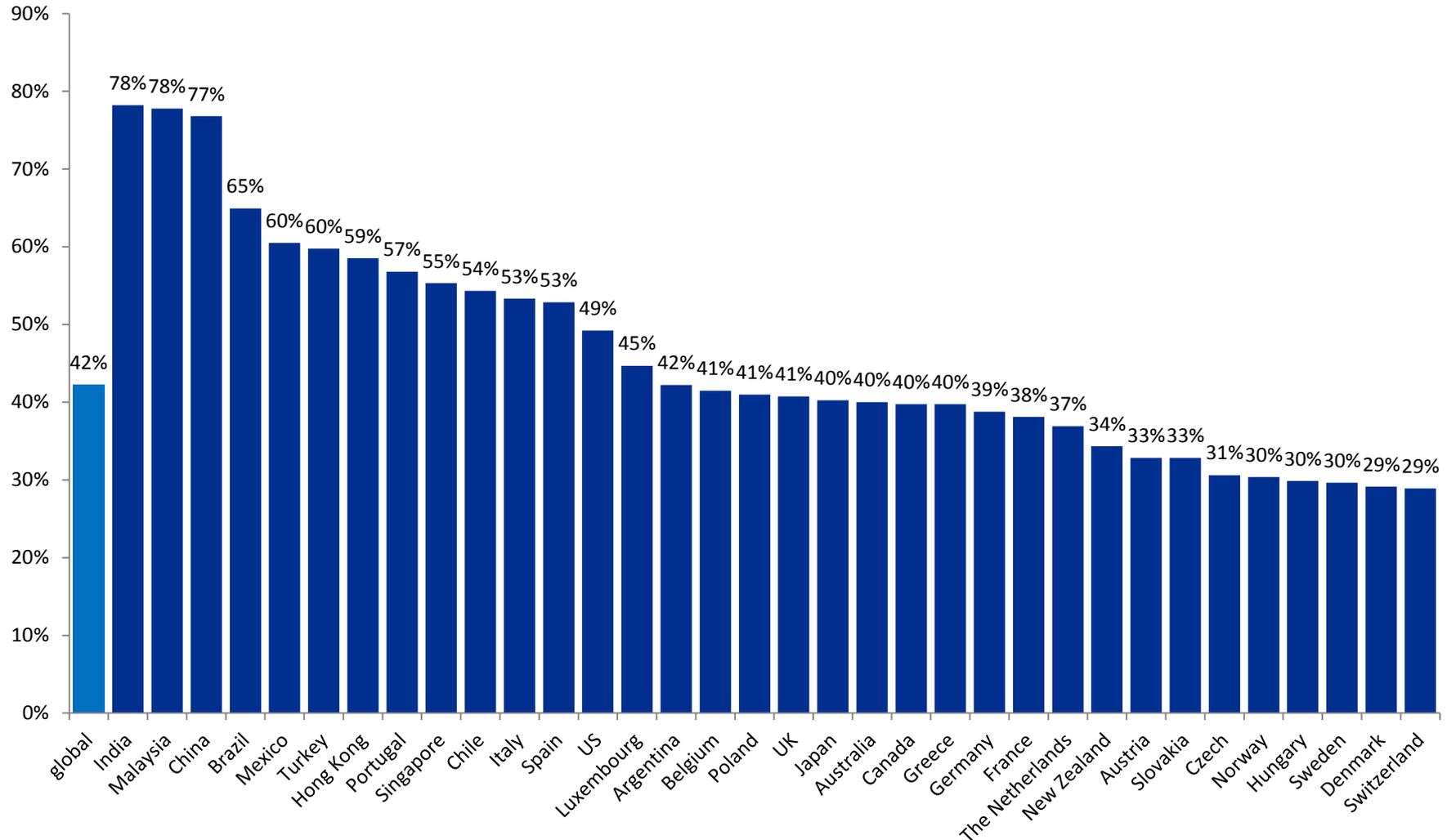
incl. quarterly mobility, job change and job satisfaction

Group Communications  
Randstad Holding nv  
December 2015

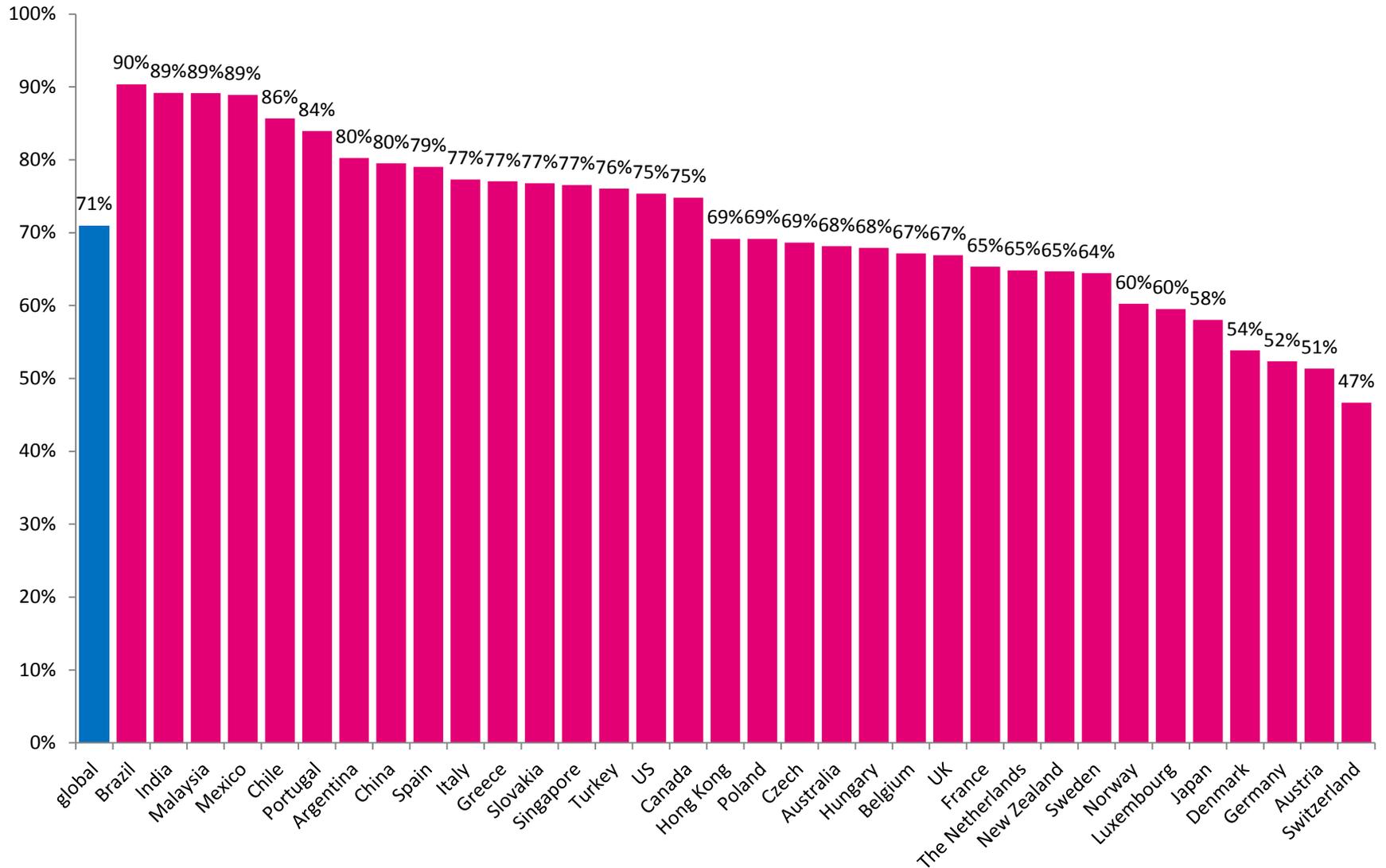


# OUTLOOK ON ECONOMIC AND FINANCIAL SITUATION, NEED FOR STEM AND DIGITAL

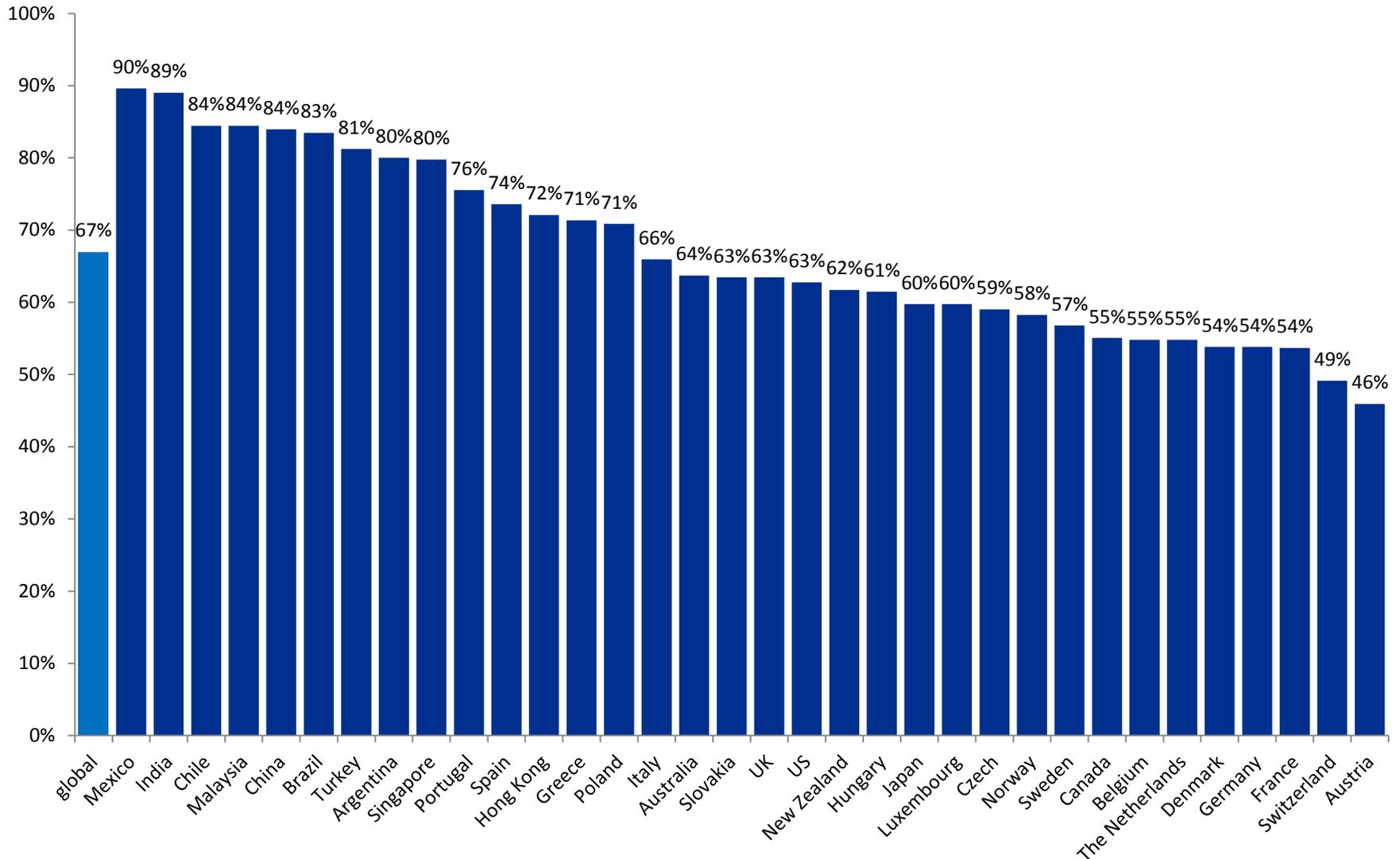
# 42% state that their employer has an increasing need for STEM profiles (Science, Technology, Engineering, Math)



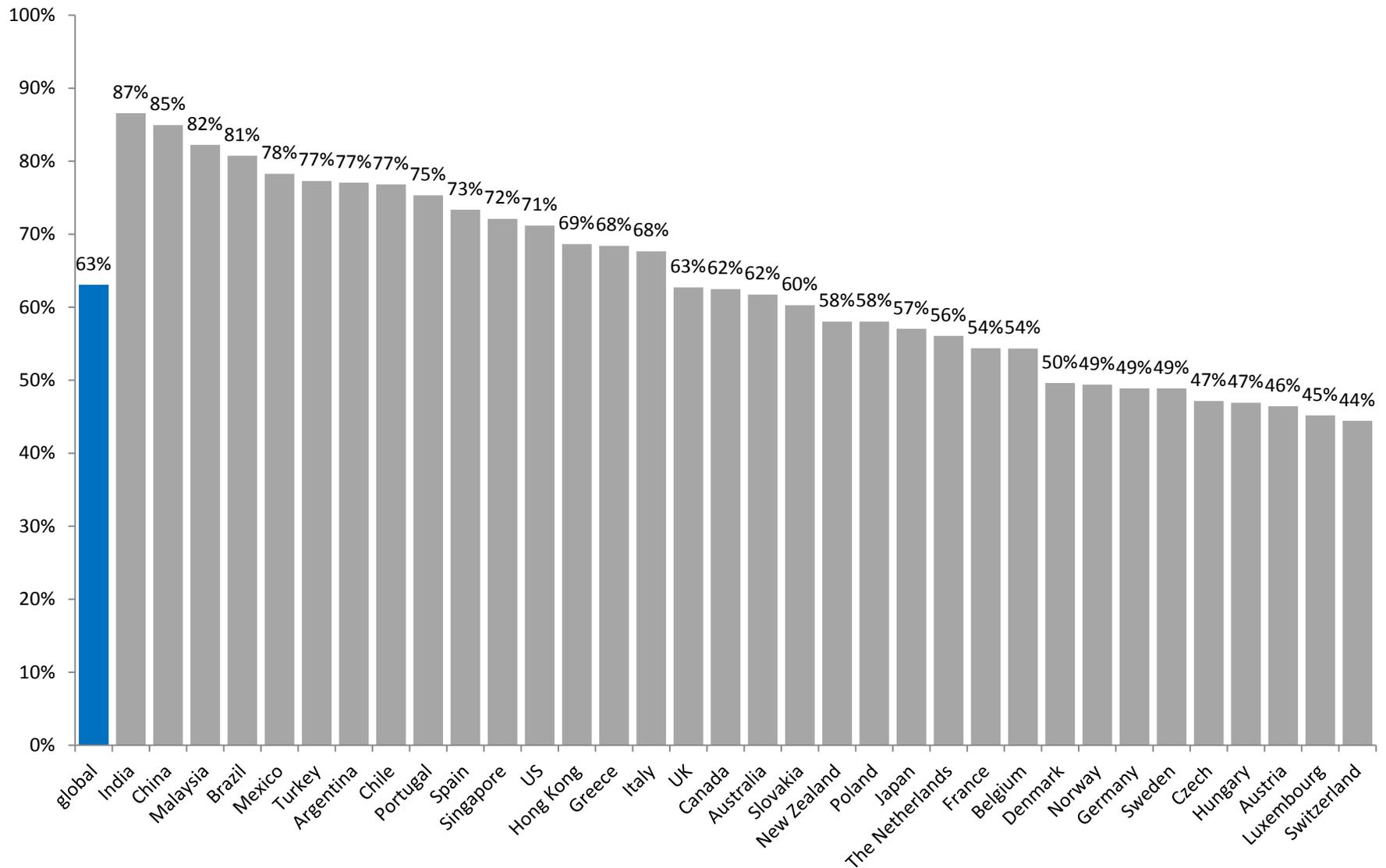
# 71% point out that more students should focus on a career within STEM



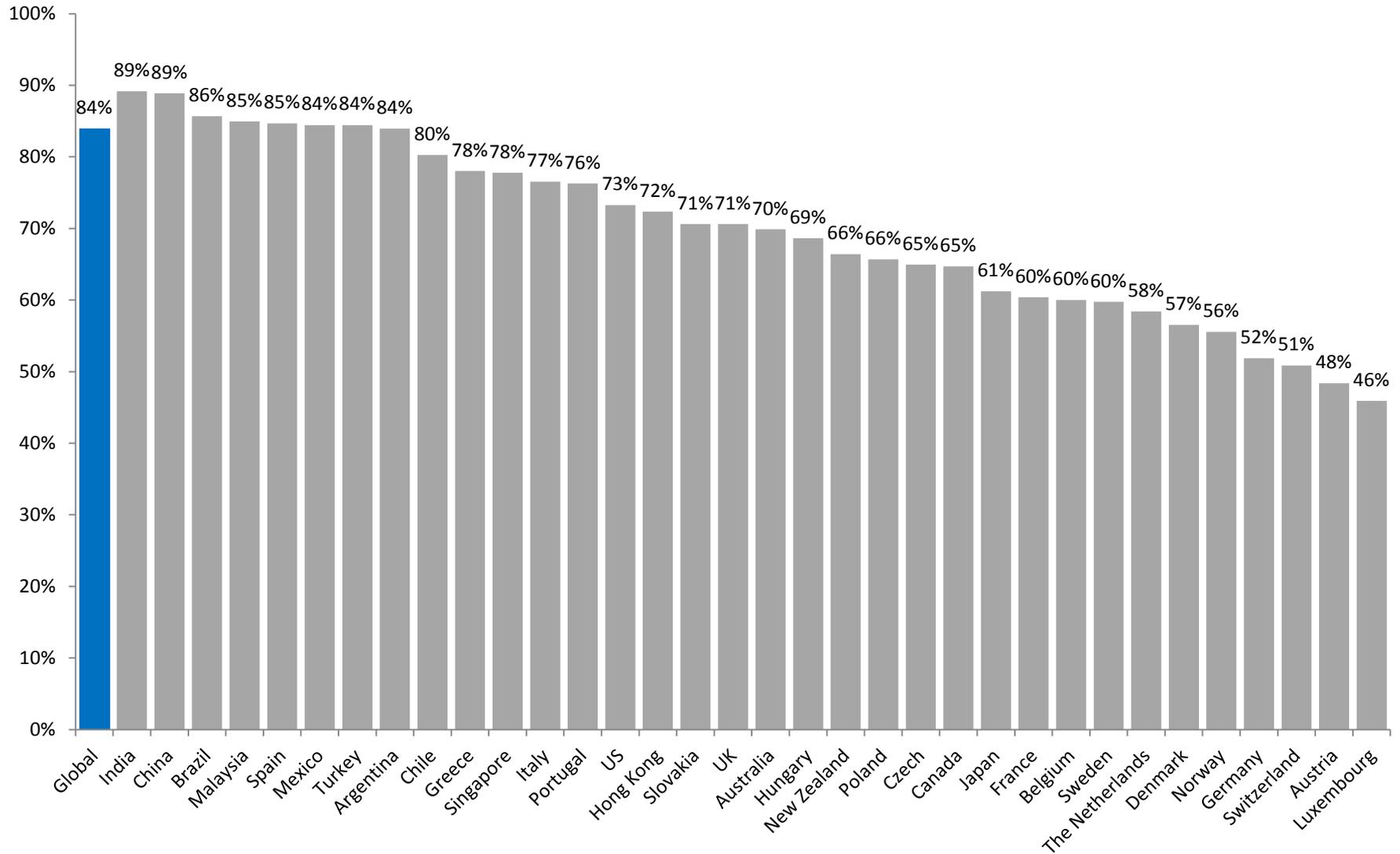
# 67% state their employer should invest more in developing digital skills



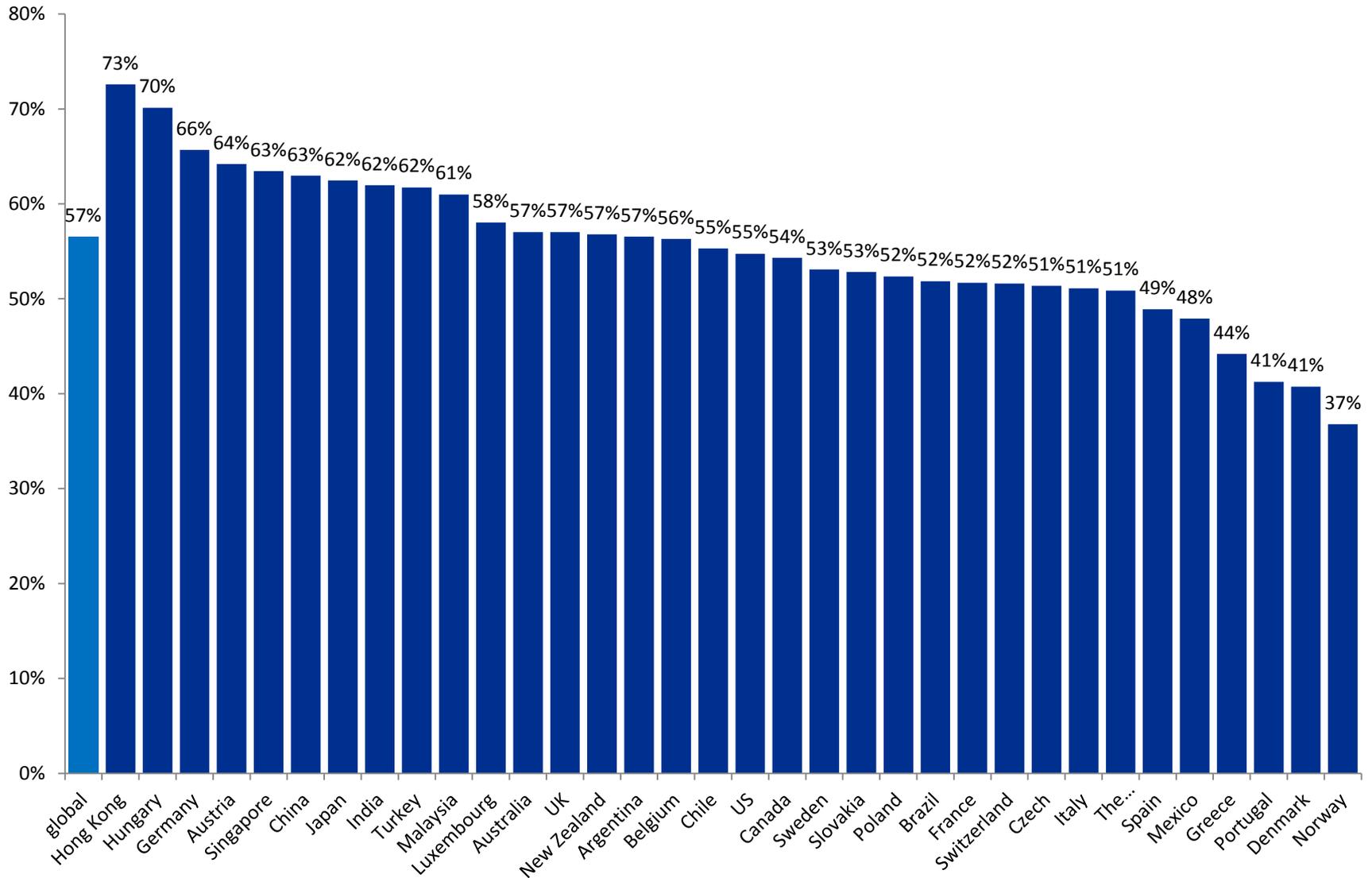
# 63% agree that if they were 18 years old again, they would focus on a study field within STEM



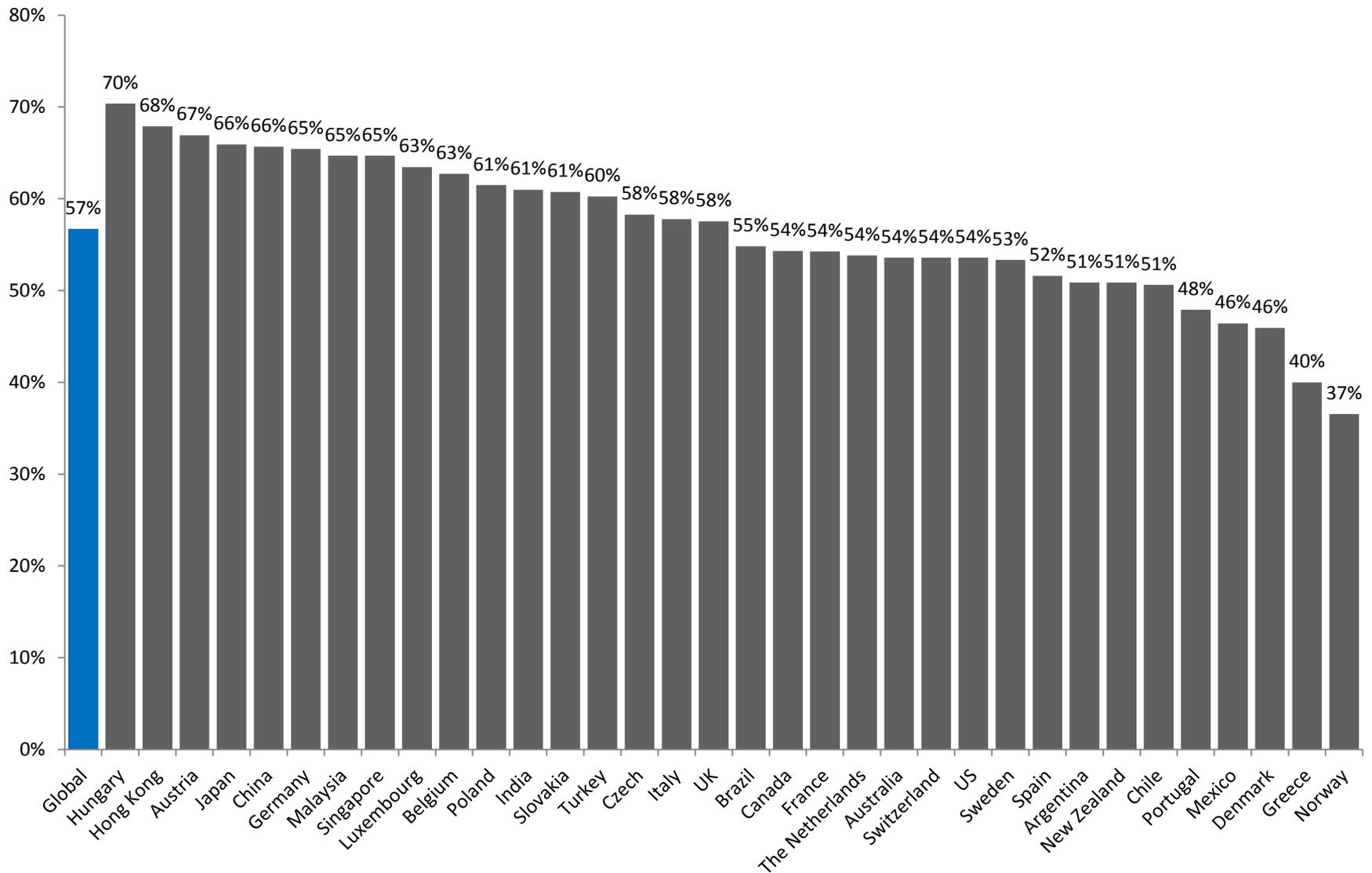
# 84% agree that if they were 18 years old again, they would focus on a study field within digital/online



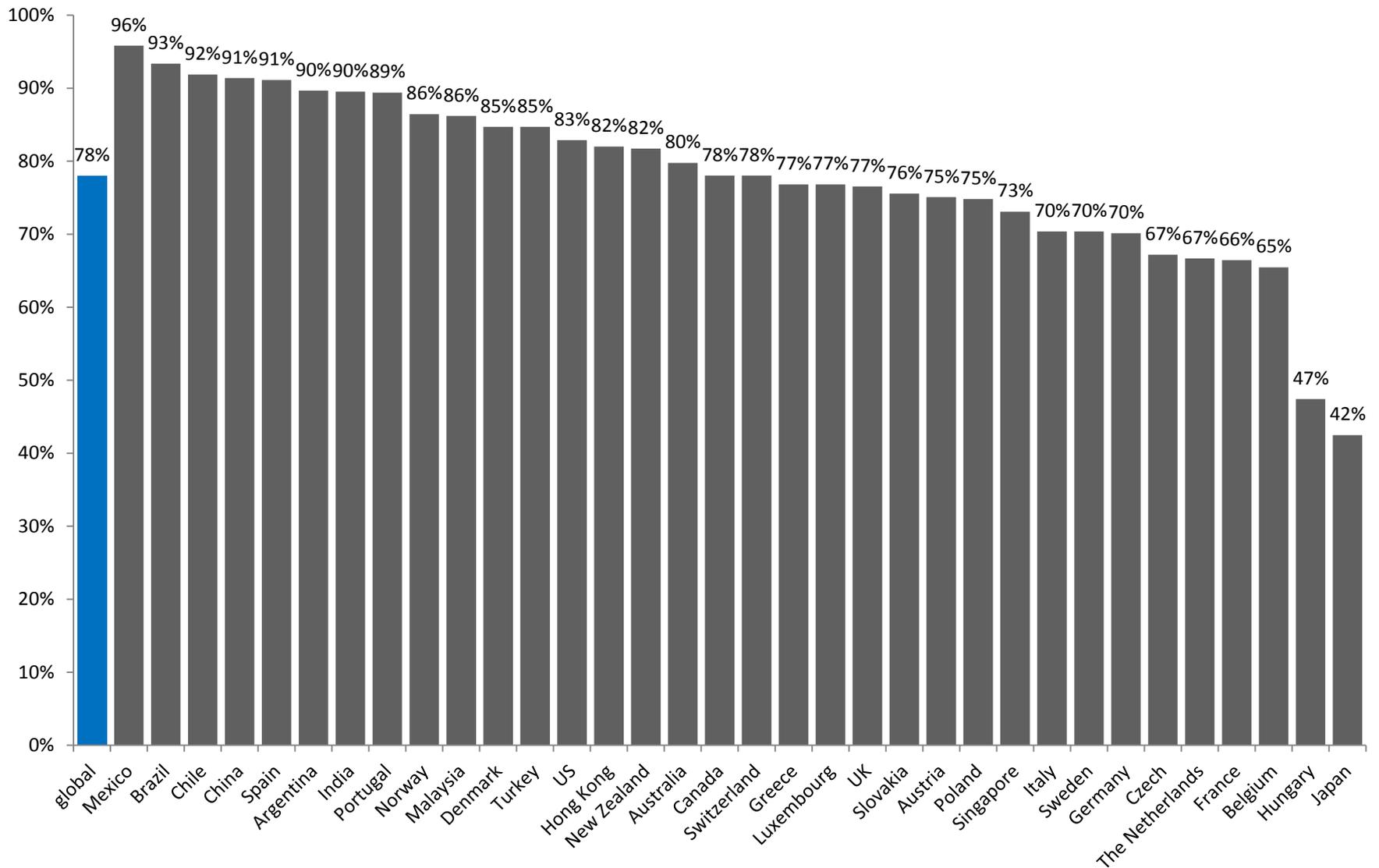
# 57% point out that their employer has trouble in finding the right talent today



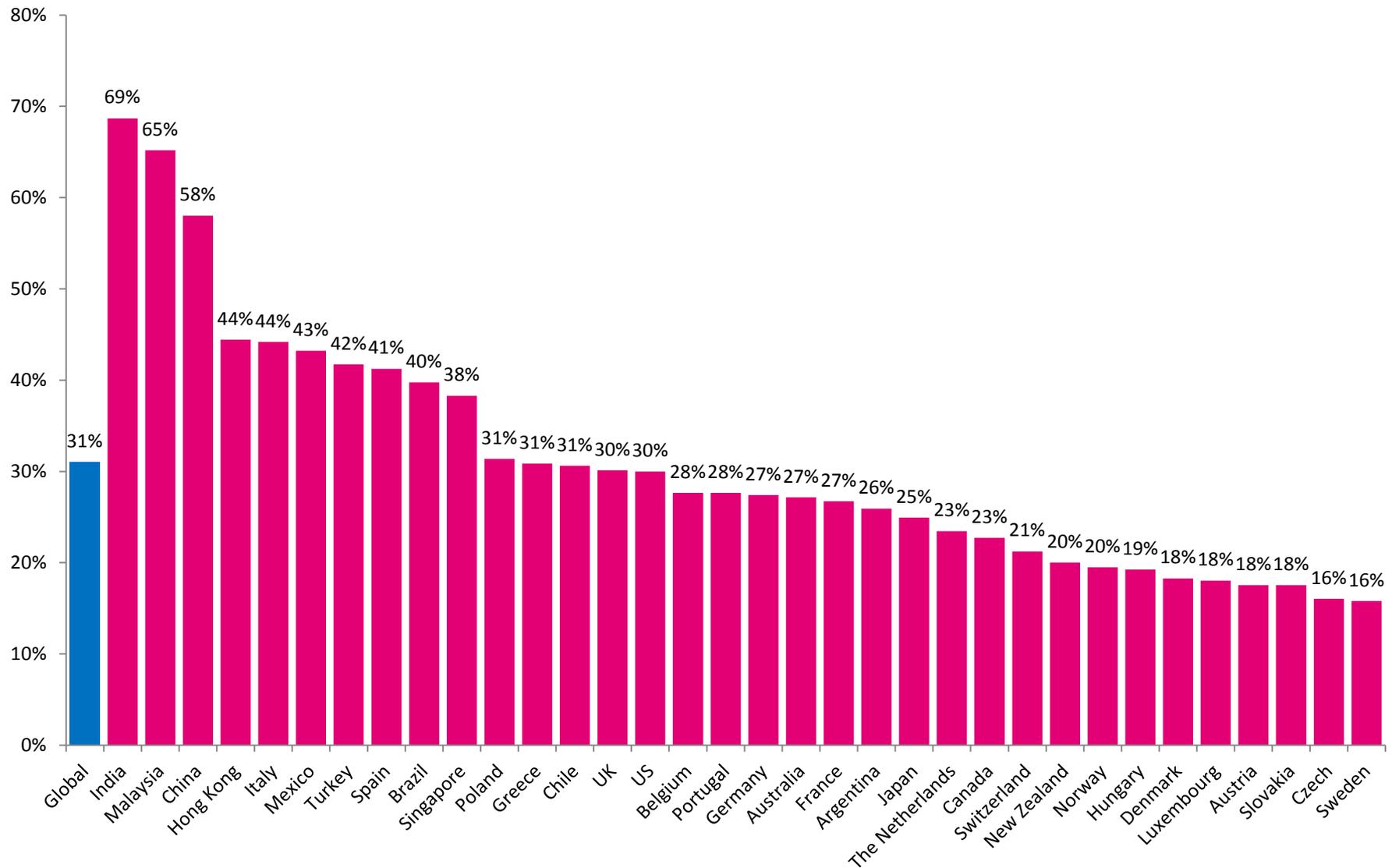
# 57% expect it to be increasingly difficult for their employer to find the right talent in the future



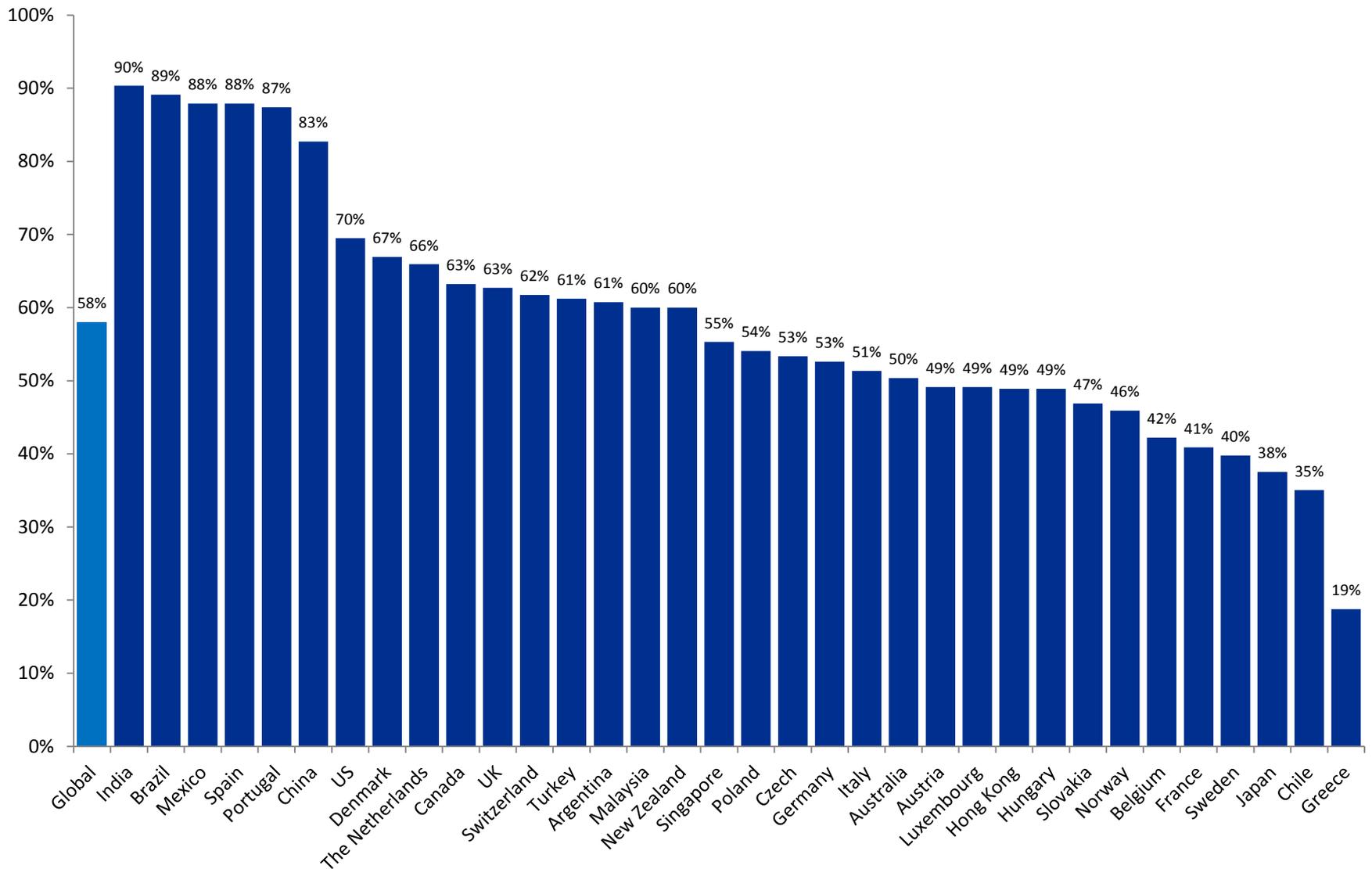
# 78% say that they feel equipped to deal with the digitalization in their job



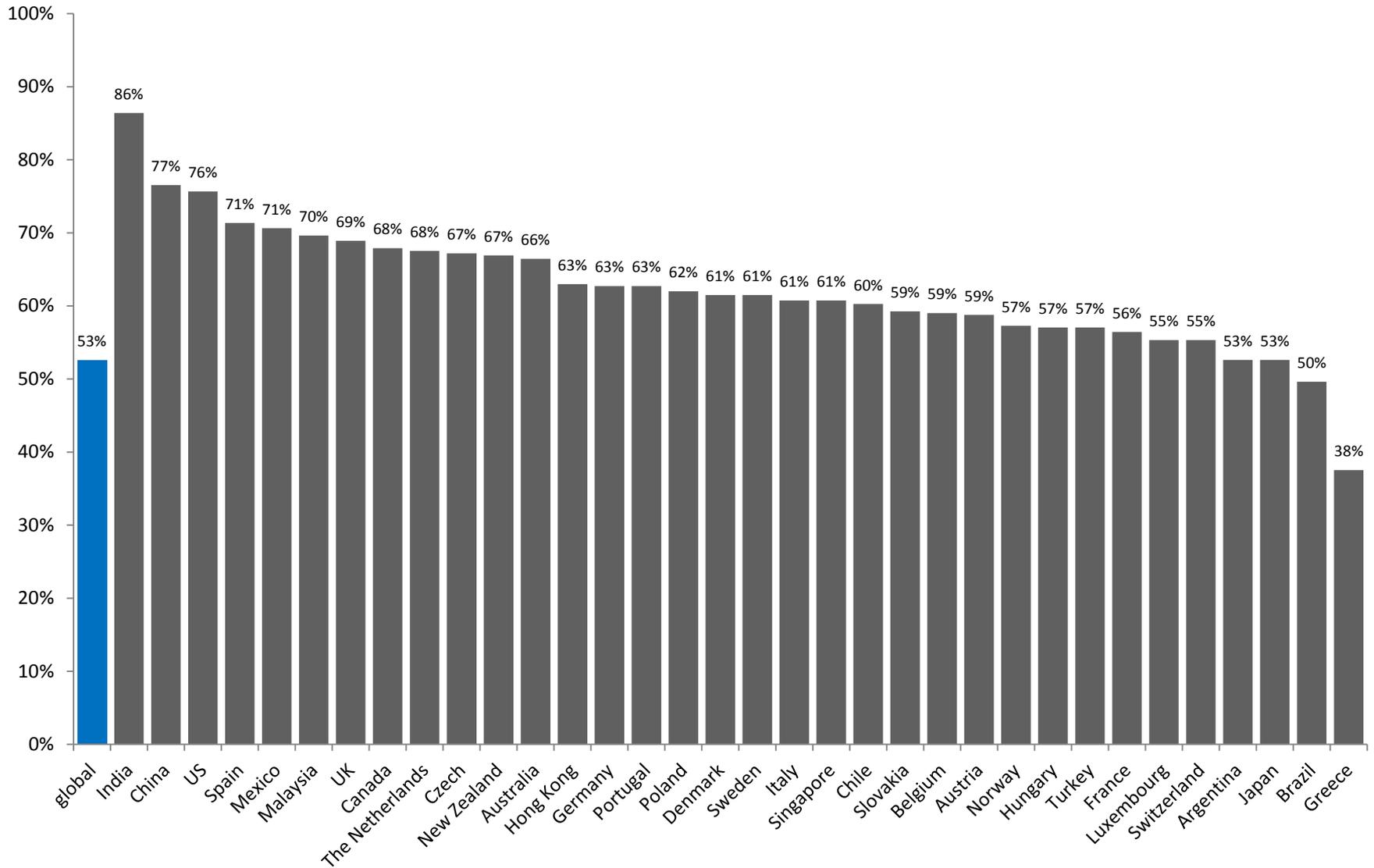
# 31% expect that their job will be automated in the next 5 to 10 years



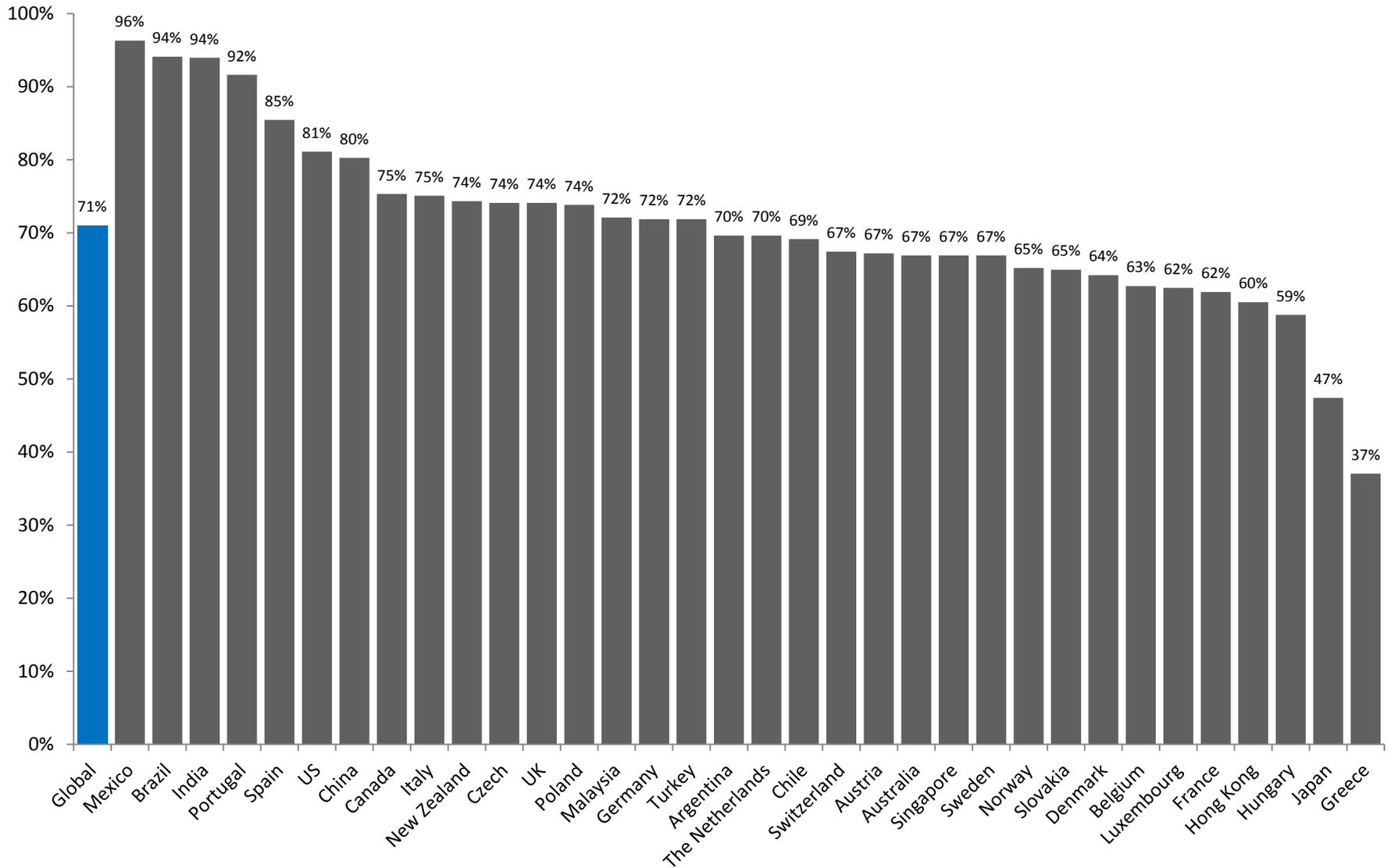
# 58% expect that the economic situation in their country will improve in 2016



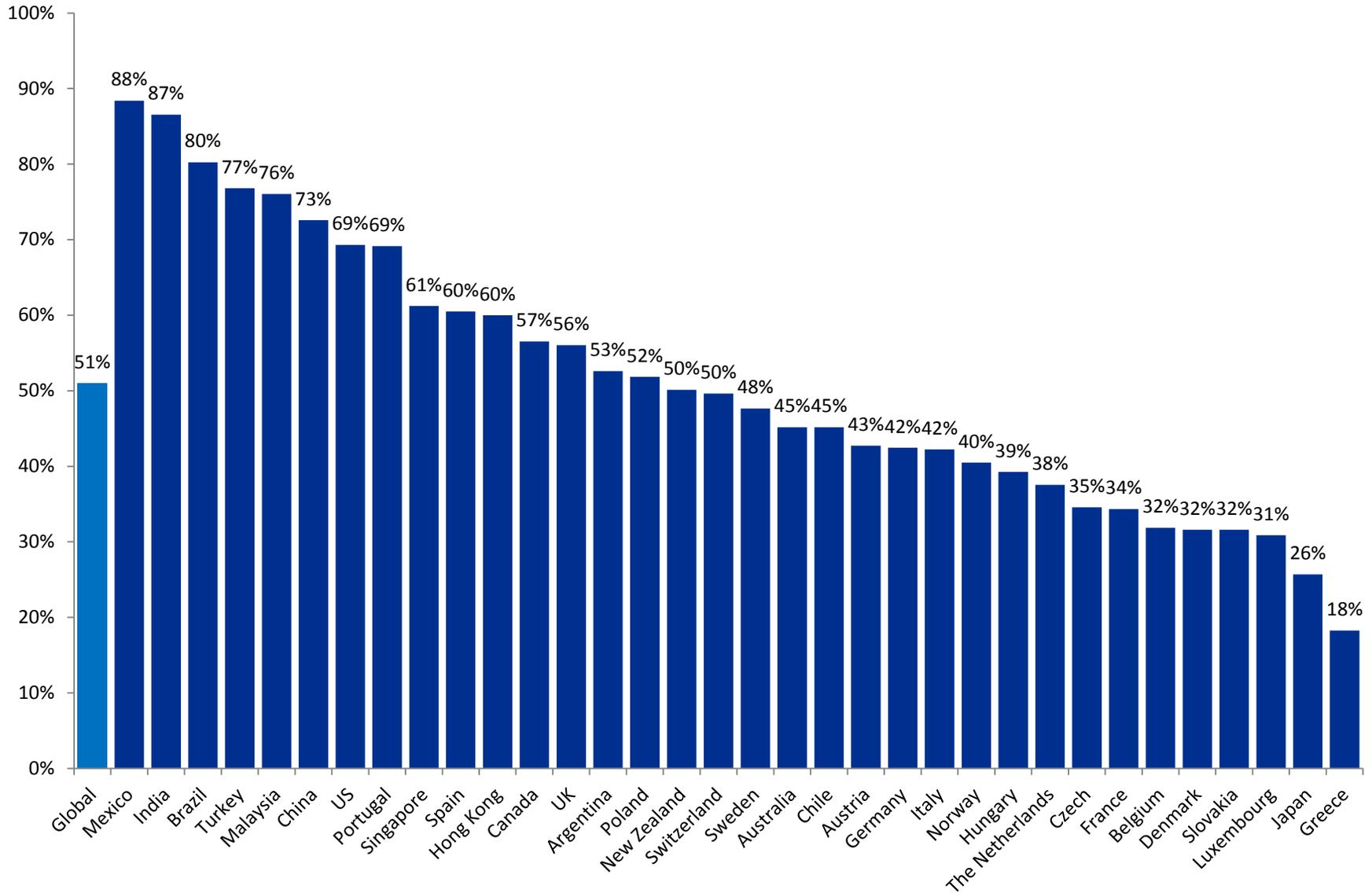
# 53% state that their employer performed better financially in 2015 than in 2014



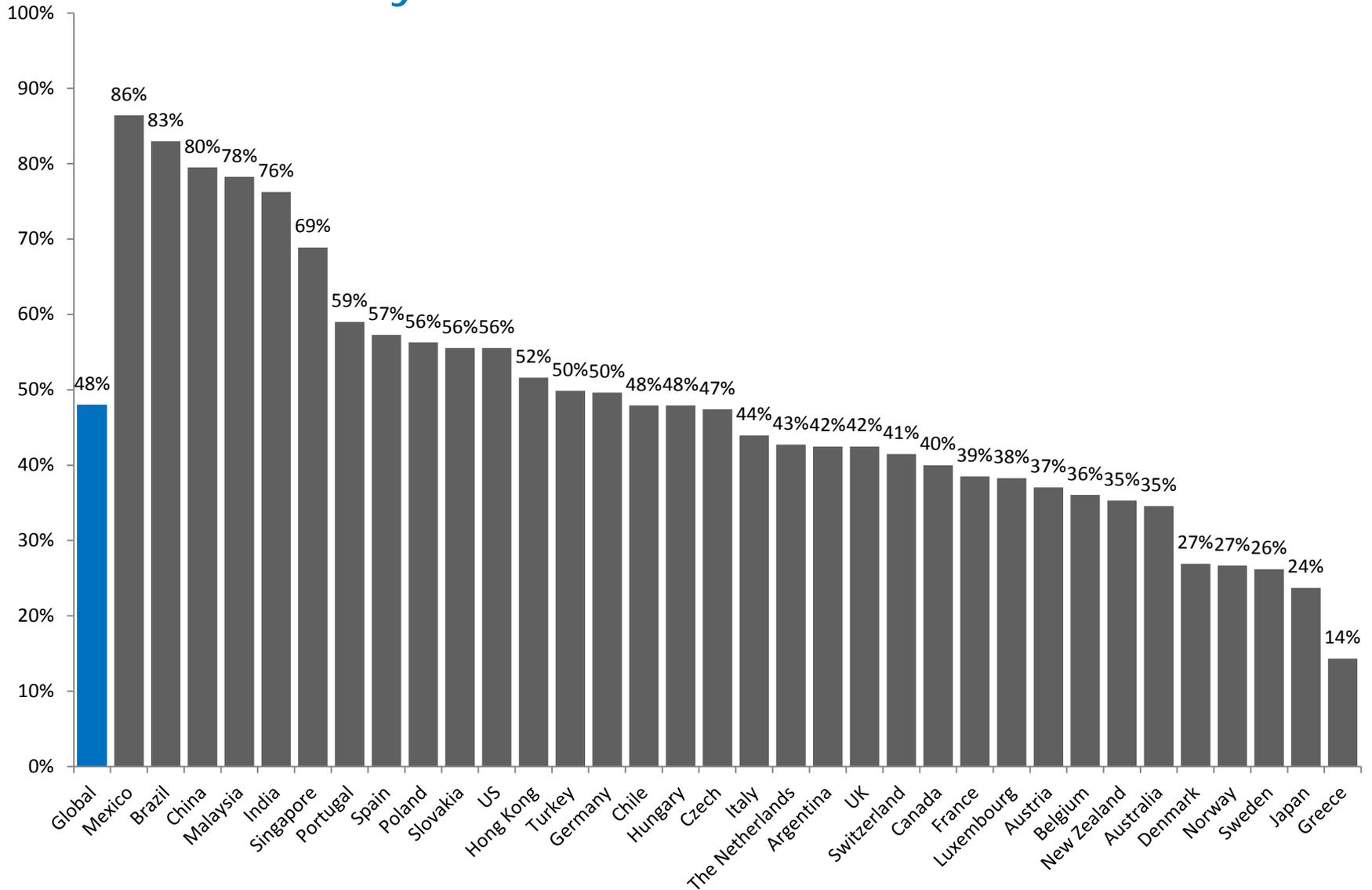
# 71% expect that their employer will perform better financially in 2016 than in 2015



# 51% expect to receive a raise at the end of this year

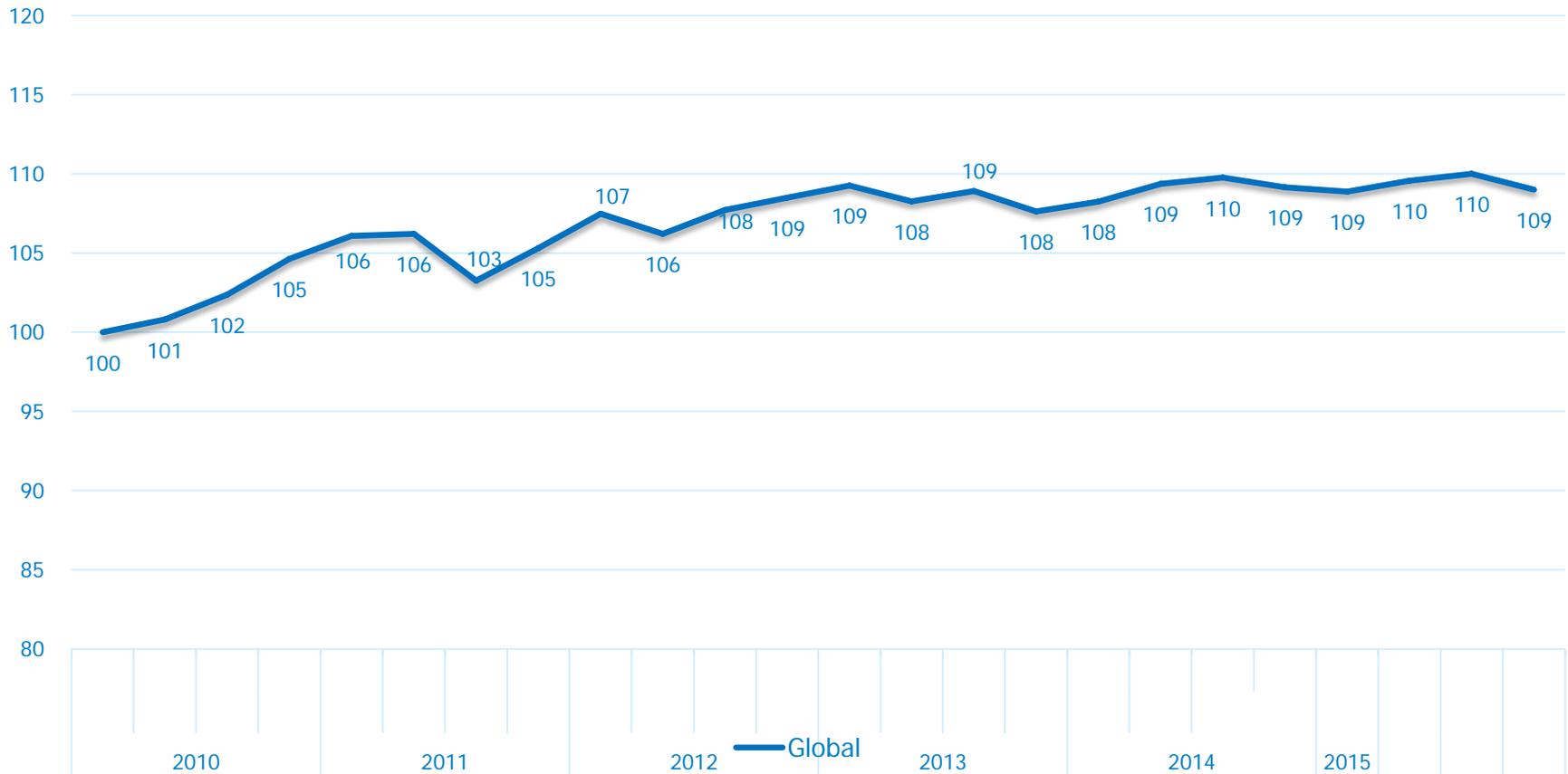


# 48% expect to receive a one-time financial bonus at the end of this year



# MOBILITY INDEX

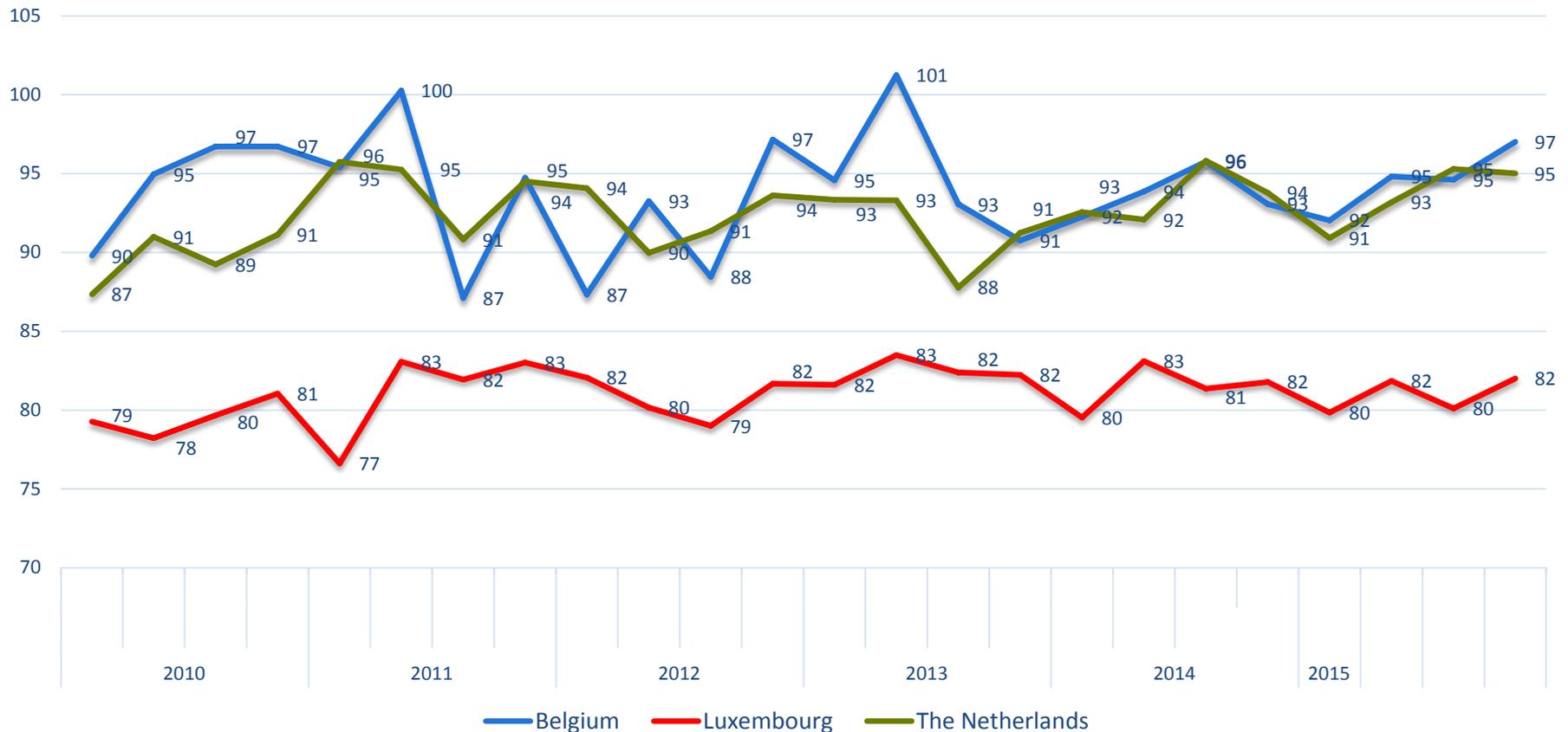
# the global Mobility Index is at the same level as last year (Q4)



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?

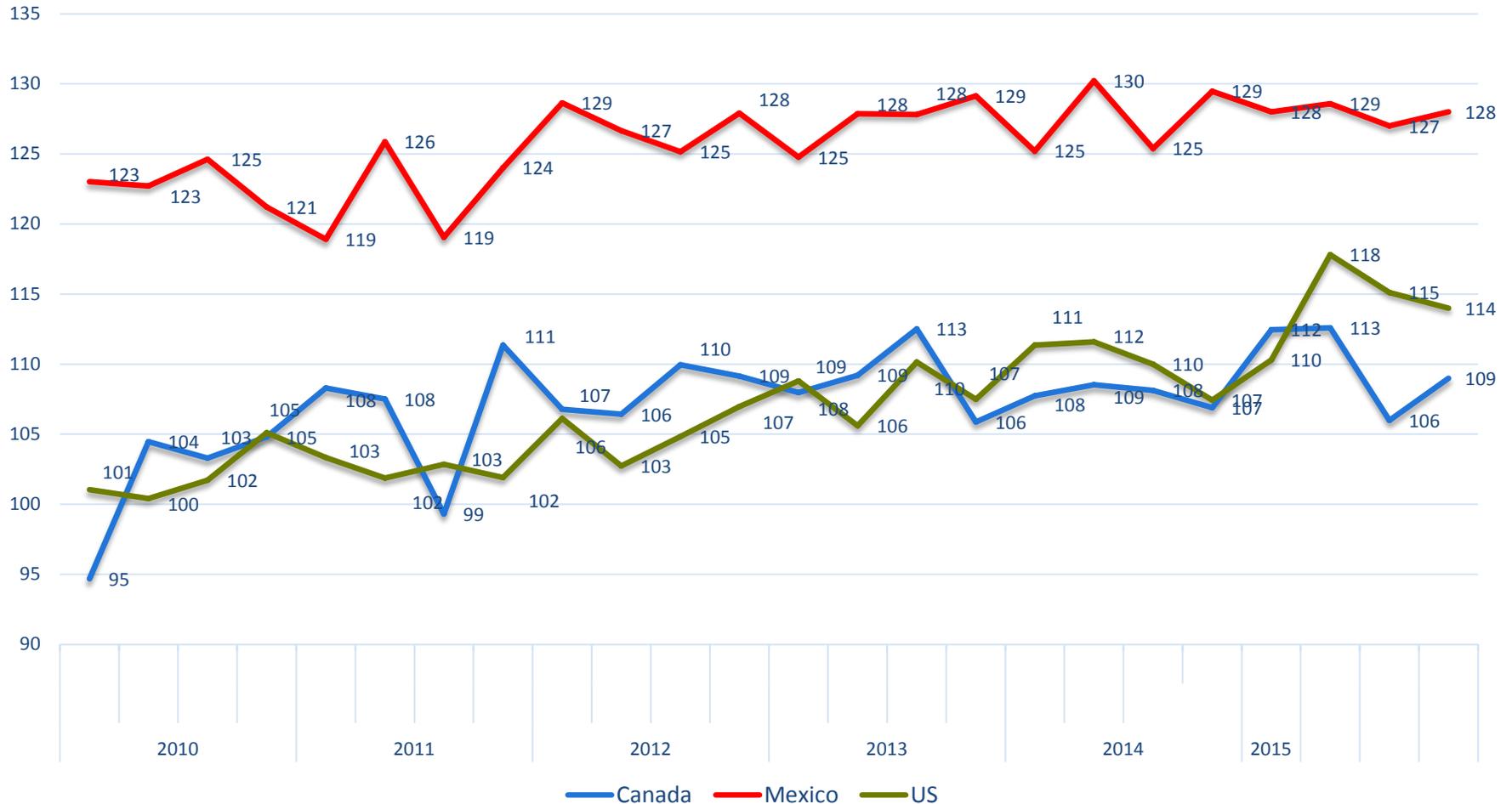
# mobility stable in the Netherlands; up in Belgium and Luxembourg (+2)



Question:

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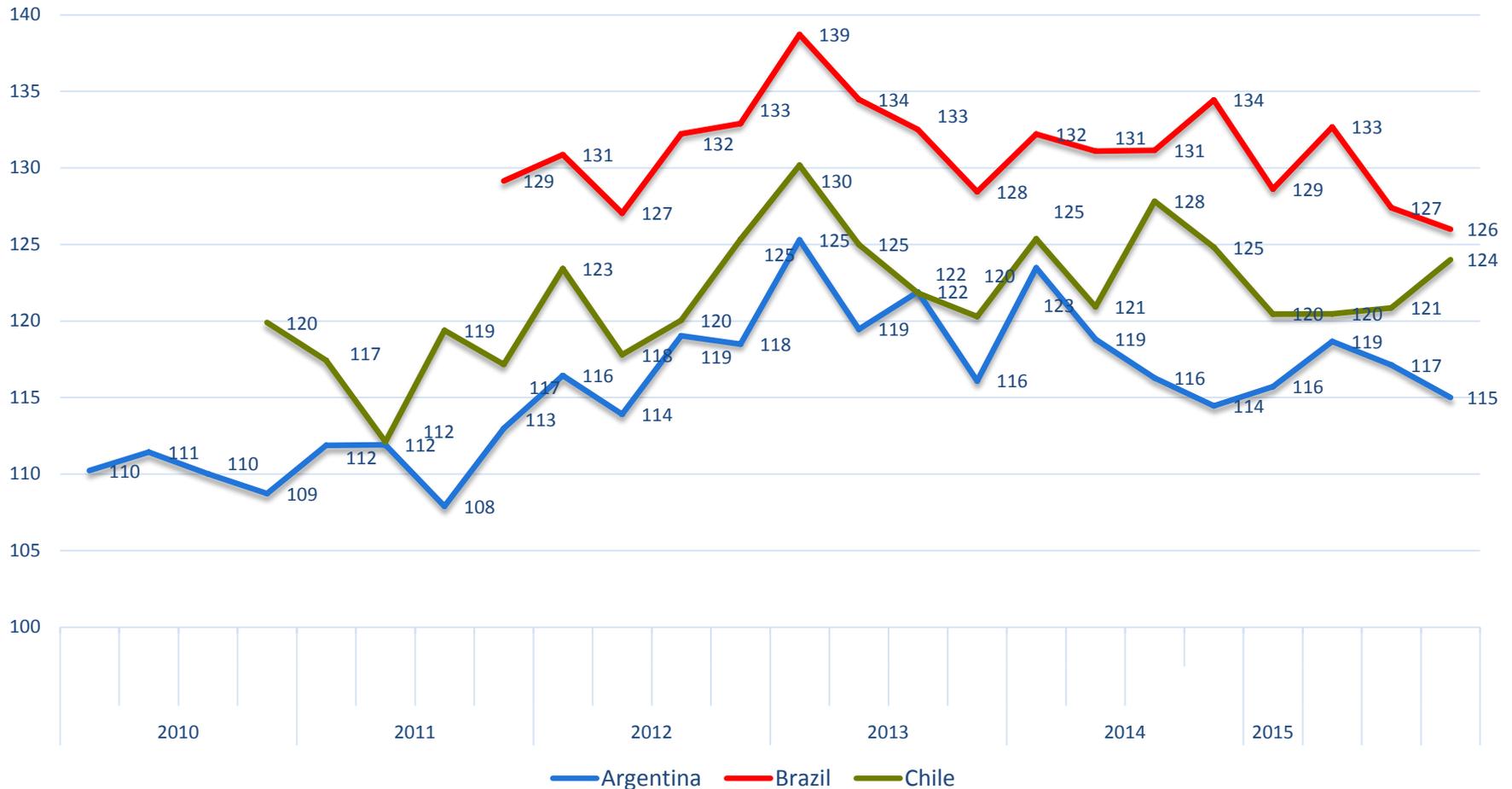
# mobility up in Canada (+3); Mexico shows slight increase (+1) and the US a slight decrease (-1)



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?

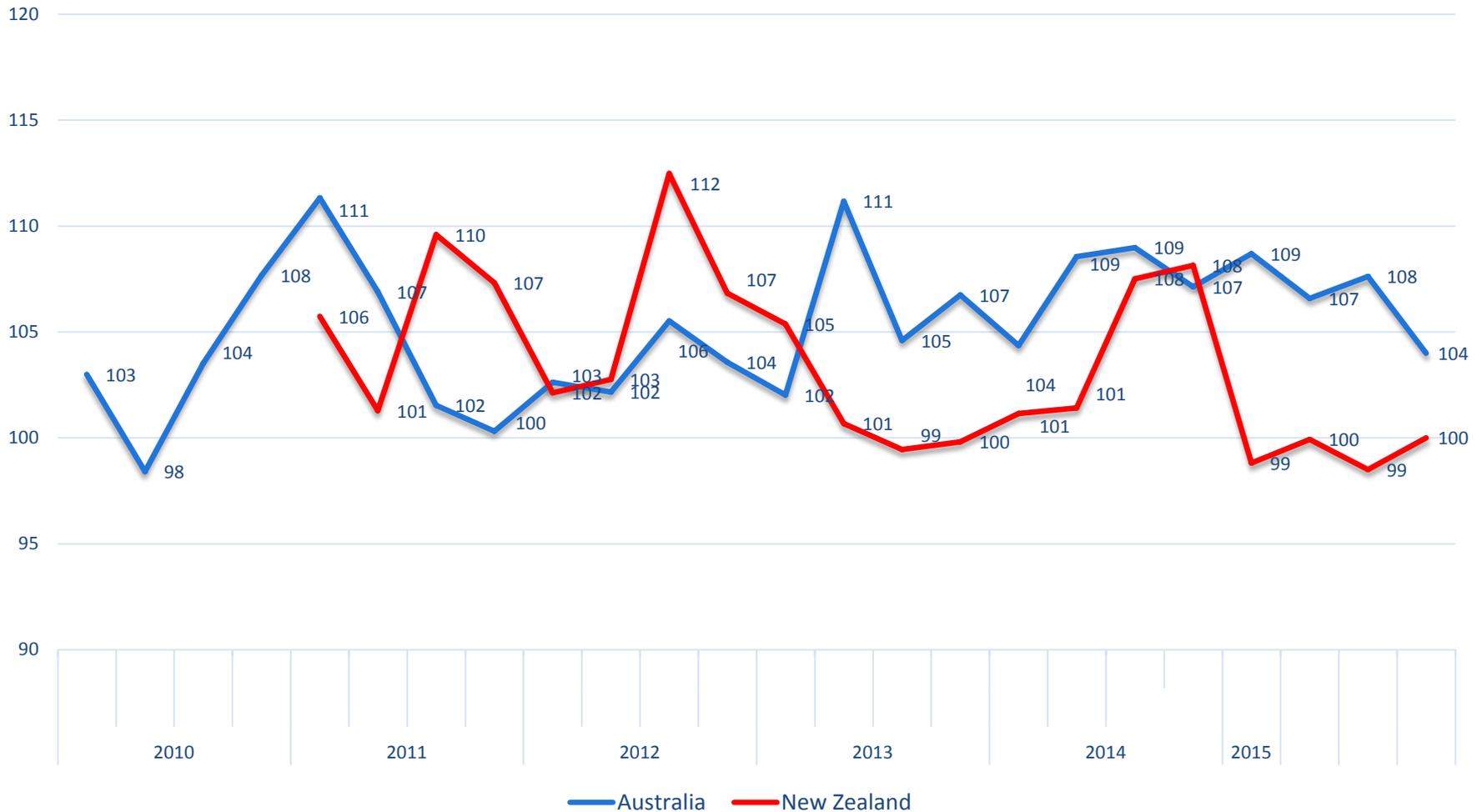
# mobility up in Chile (+3), down in Argentina (-2) and Brazil (-1)



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?

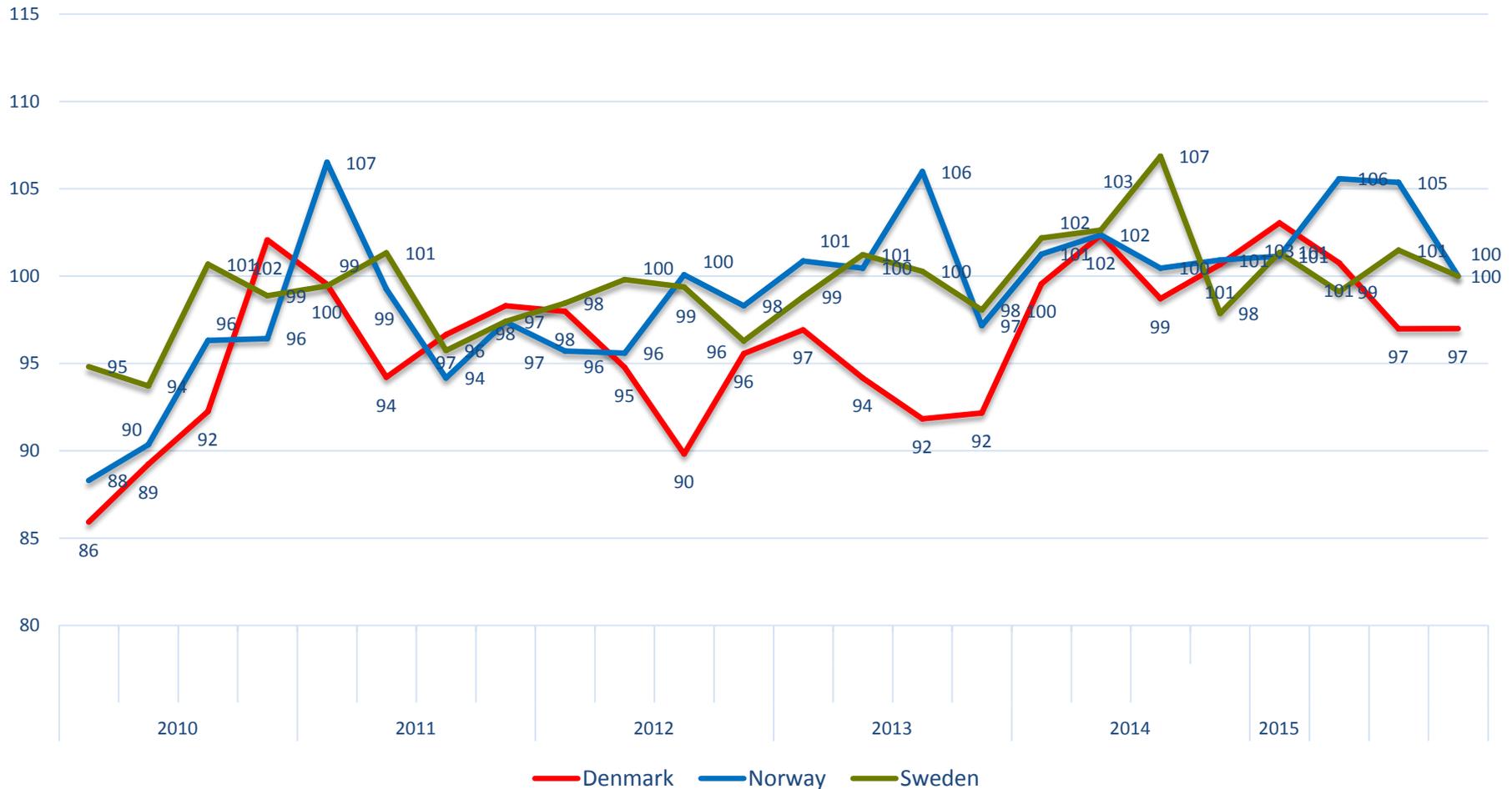
# mobility dropped in Australia (-4); New Zealand shows a slight increase in mobility (+1)



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?

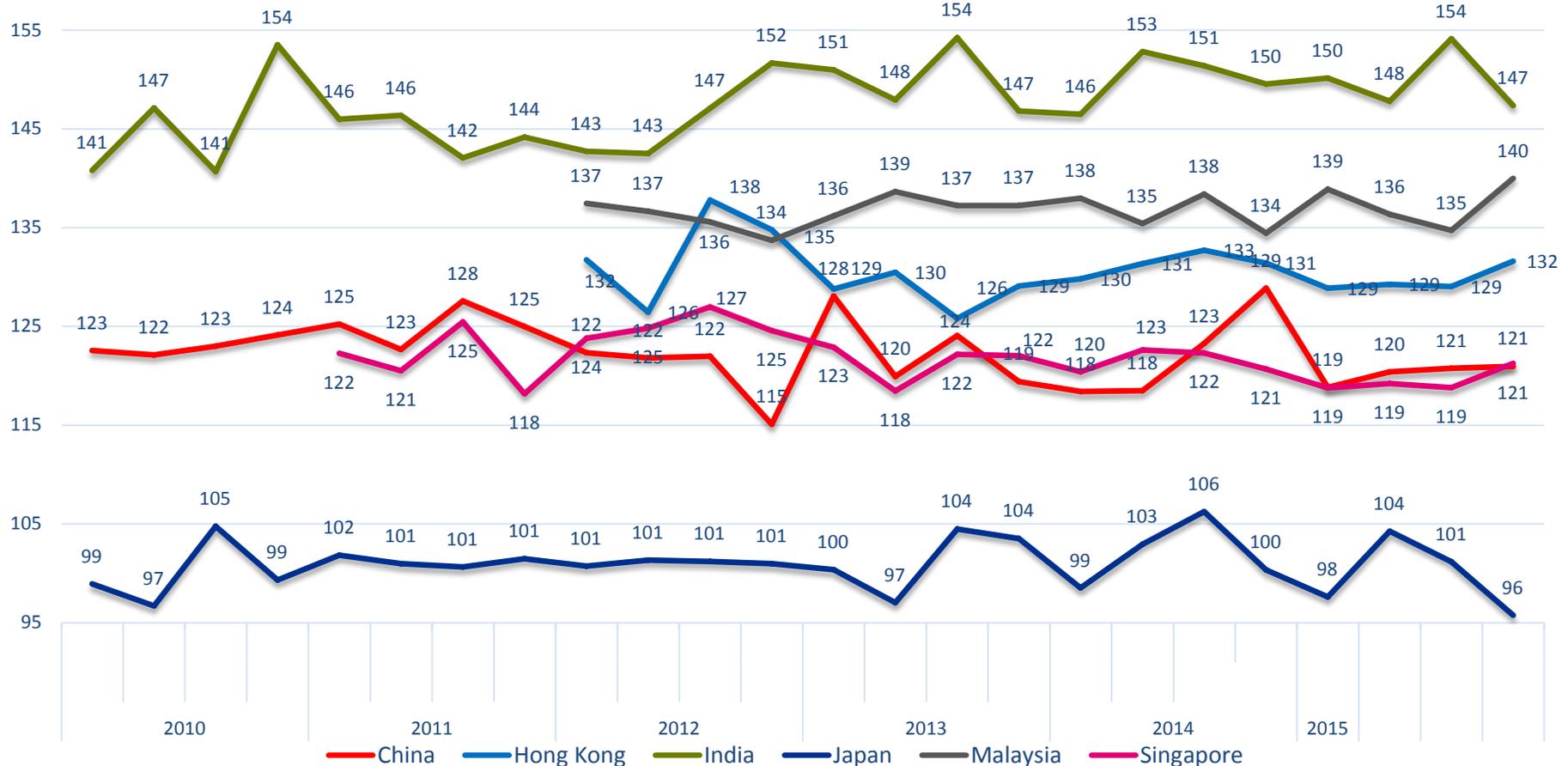
# mobility dropped in Norway (-5); a slight decrease in Sweden (-1), stable in Denmark



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?

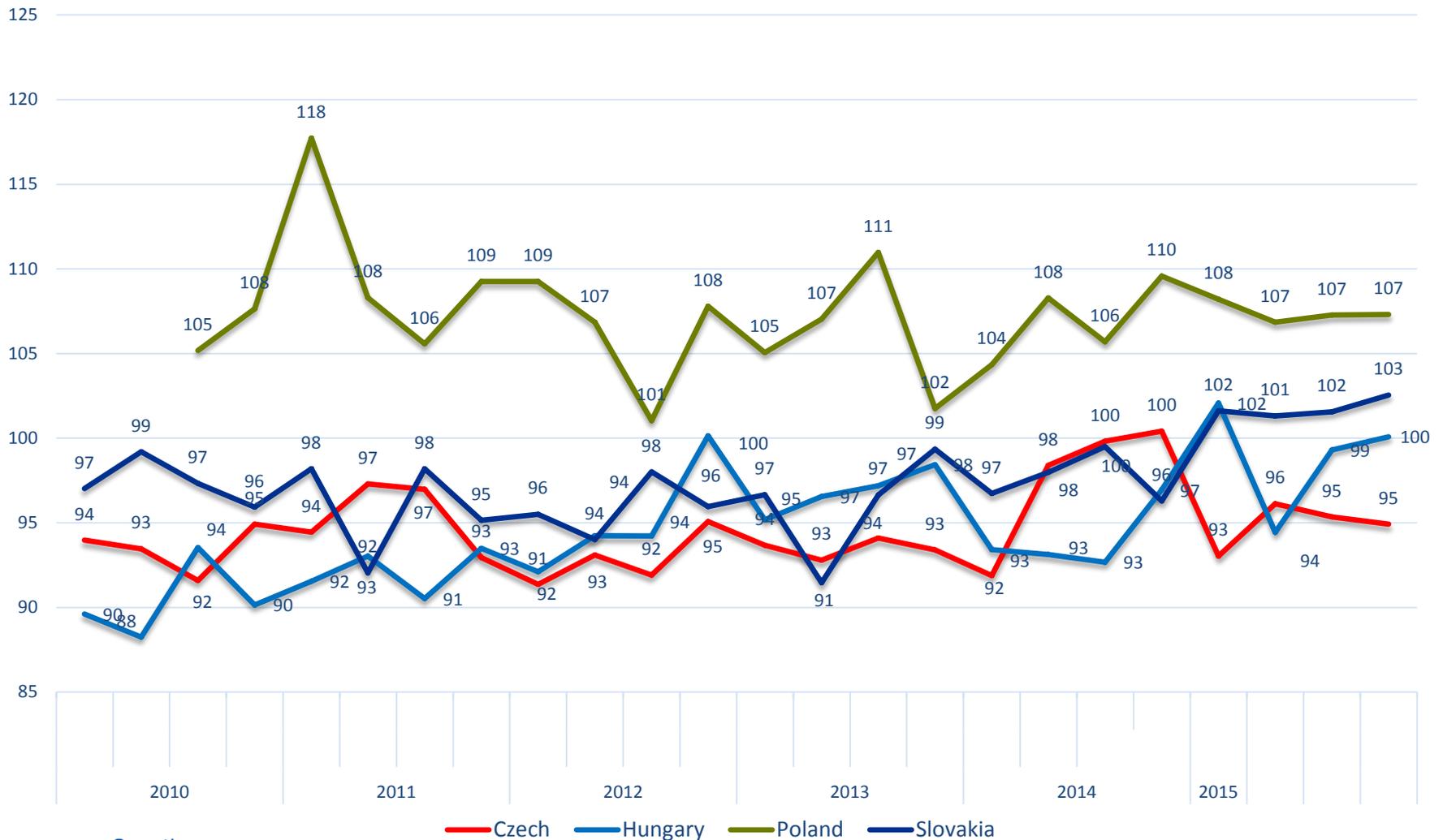
mobility down in India (-7) and Japan (-5); up in Malaysia (+5) and Hong Kong (+3). A slight increase in Singapore (+1); China no change



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?

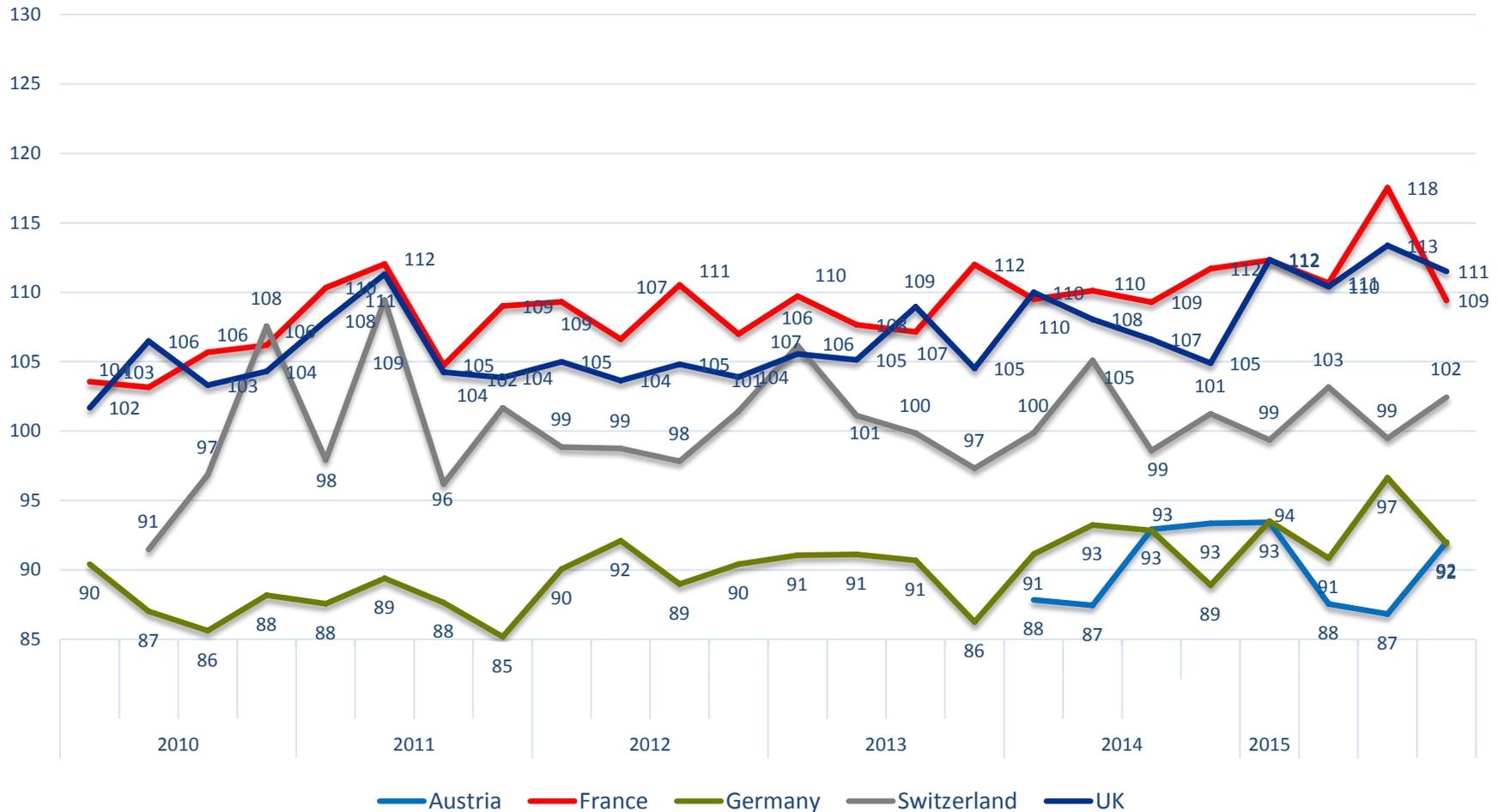
# mobility slightly up in Slovakia and Hungary (+1). In Czech Republic and Poland no change



Question:

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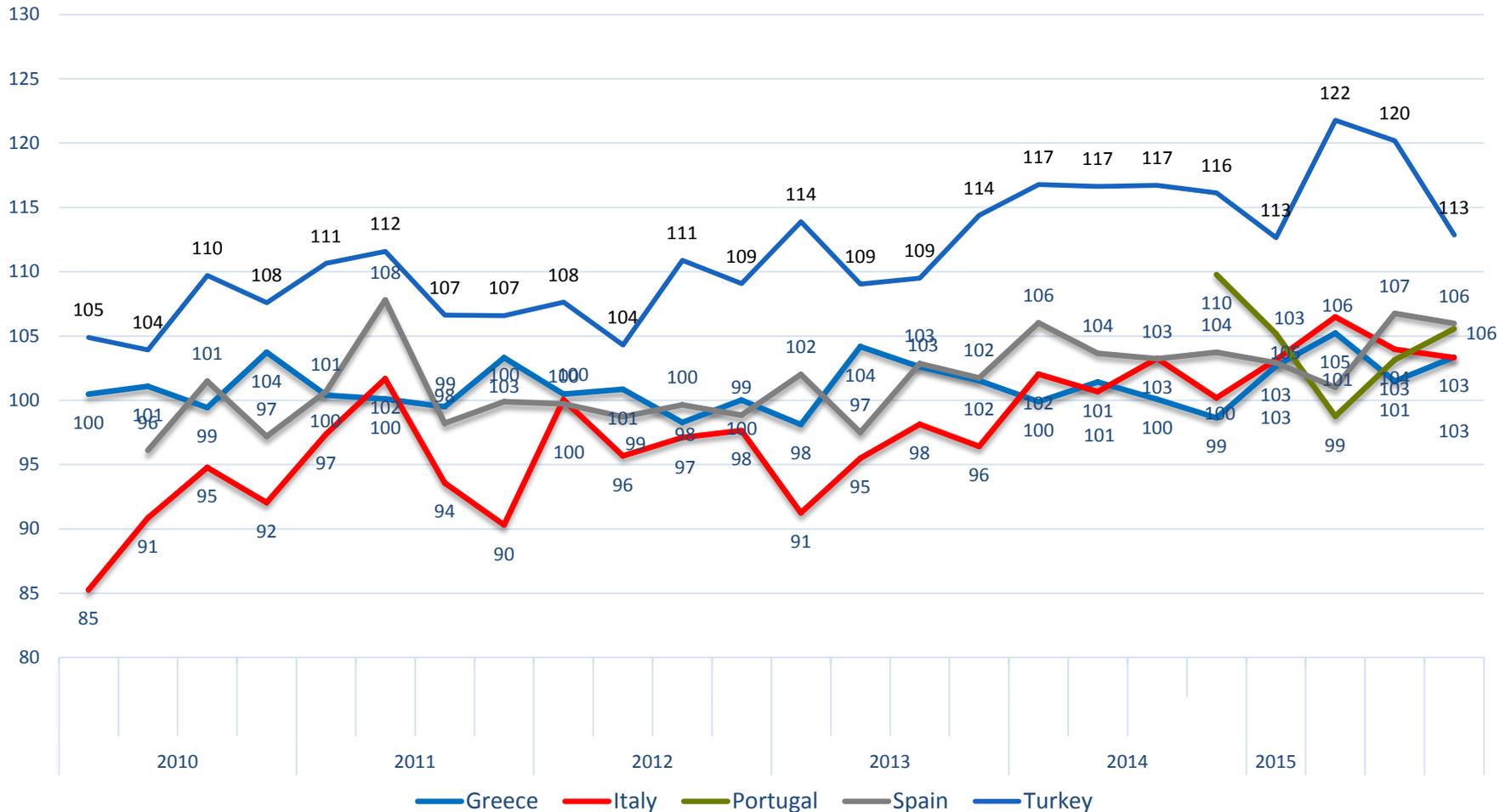
mobility dropped in France (-9) and Germany (-5); also UK shows a decrease (-2). Up in Austria (+5) and Switzerland (+3)



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?

mobility dropped in Turkey (-7), slightly down in Italy and Spain (-1). Up in Portugal (+3) and Greece (+2)

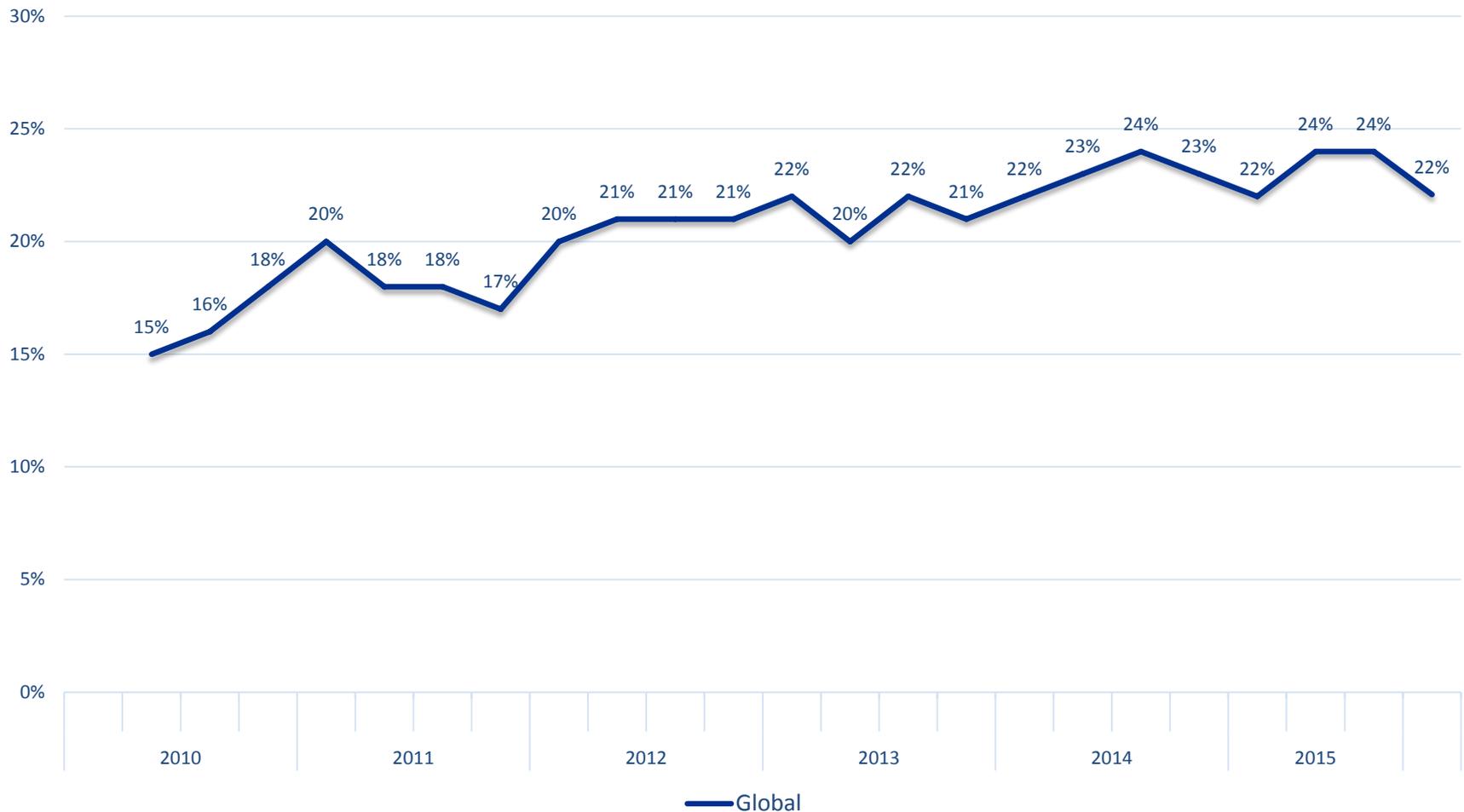


Question:

- 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?

# ACTUAL JOB CHANGE

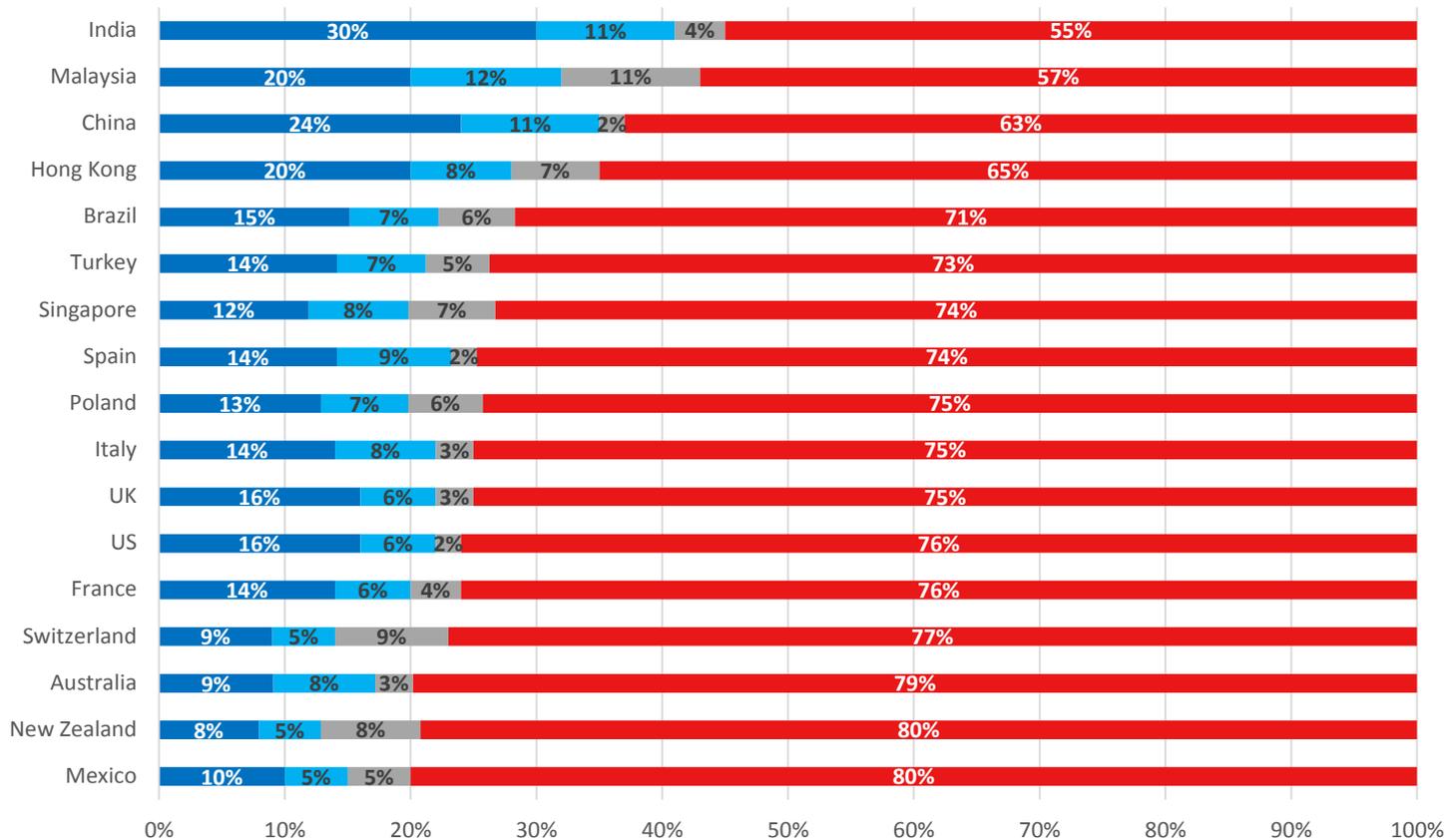
# actual job change decreased (-2%) compared to last quarter



## 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 increased in Portugal, Turkey, Austria, Australia and Malaysia.

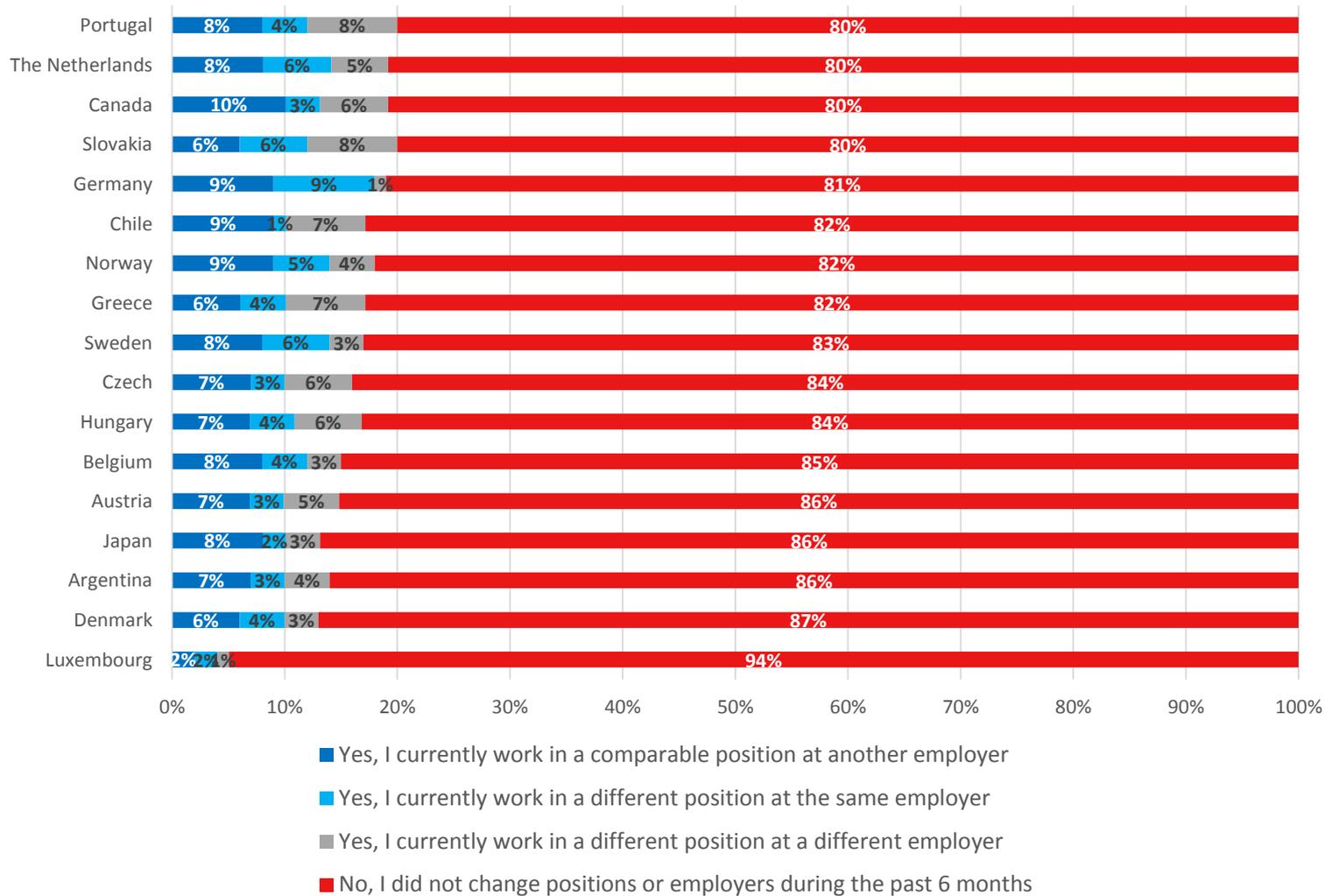
In US, Japan, Denmark, Chile, Belgium, India, Singapore the job change decreased compared to last quarter.

- 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?

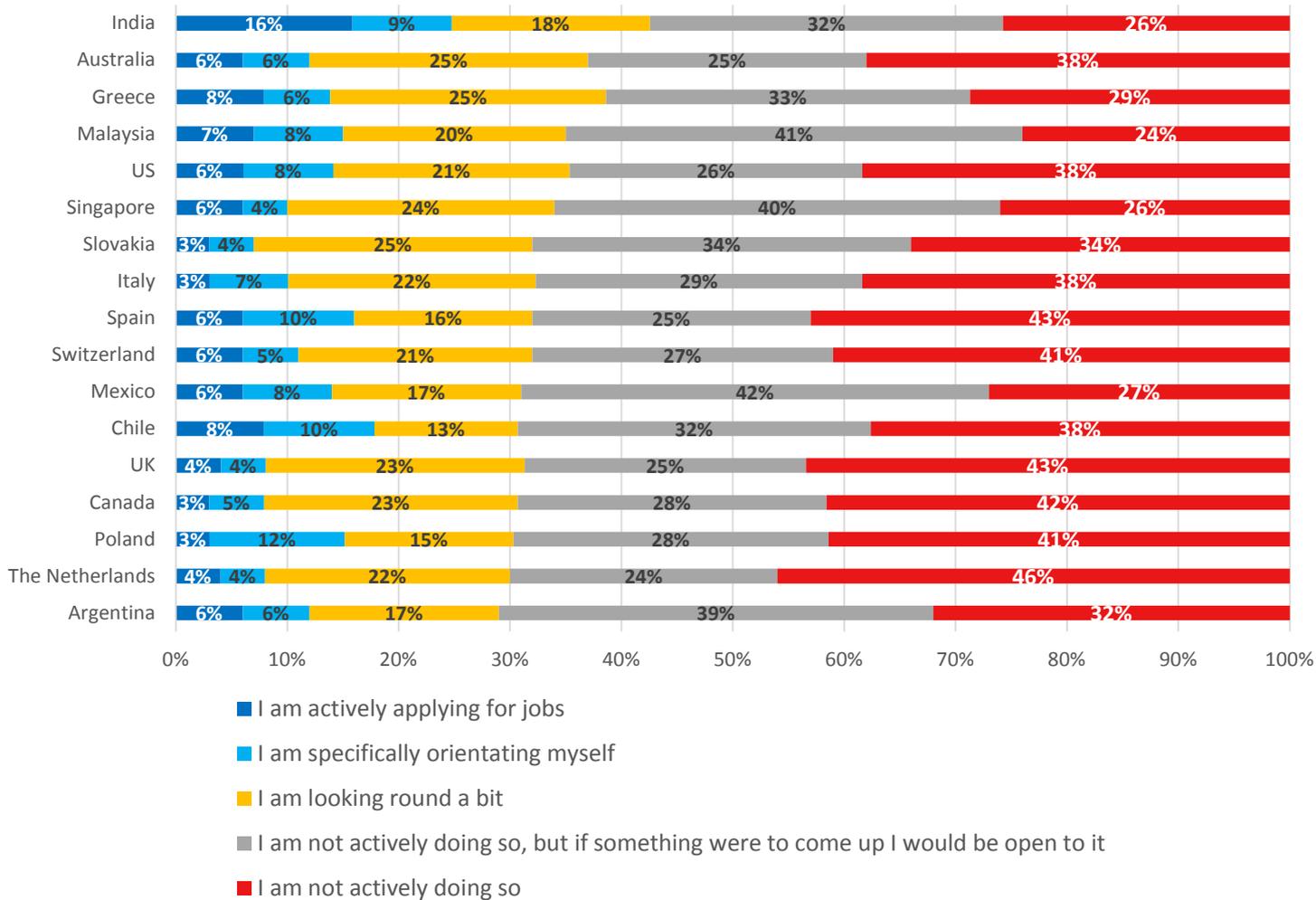
# actual job change lowest in Luxembourg



Question:  
Have you changed jobs during the past six months?

# JOB CHANGE APPETITE

# India highest appetite for job change



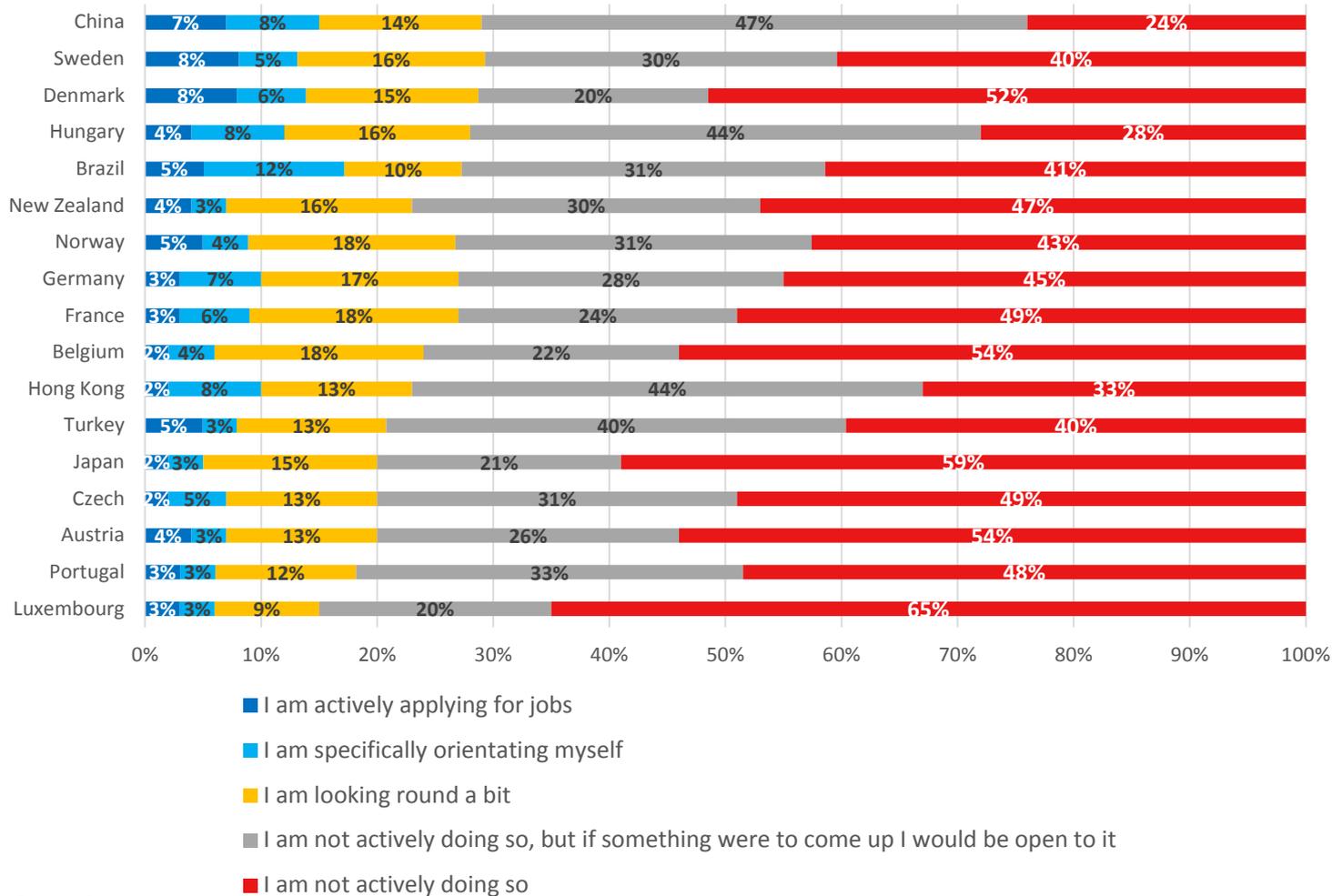
Compared to last quarter, the job appetite increased in Greece, Singapore, Slovakia, Denmark, China and Norway.

The UK, Italy, India, Brazil, Czech Republic, Poland and Japan. show a decrease in appetite compared to last quarter

## Question:

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

# Portugal and Luxembourg show lowest appetite for job change

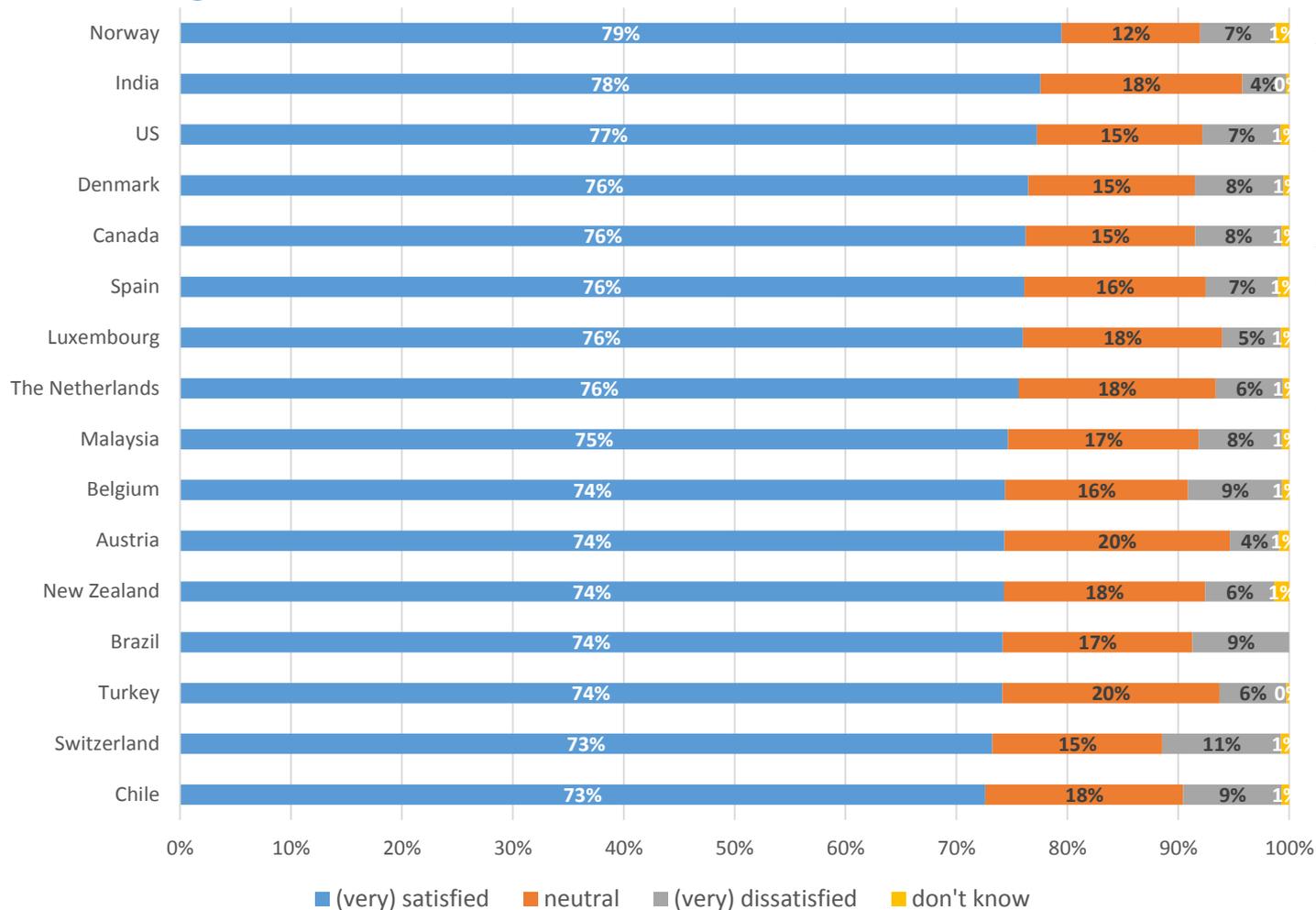


Question:

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

# JOB SATISFACTION

# job satisfaction is high in most countries; highest in Norway and India



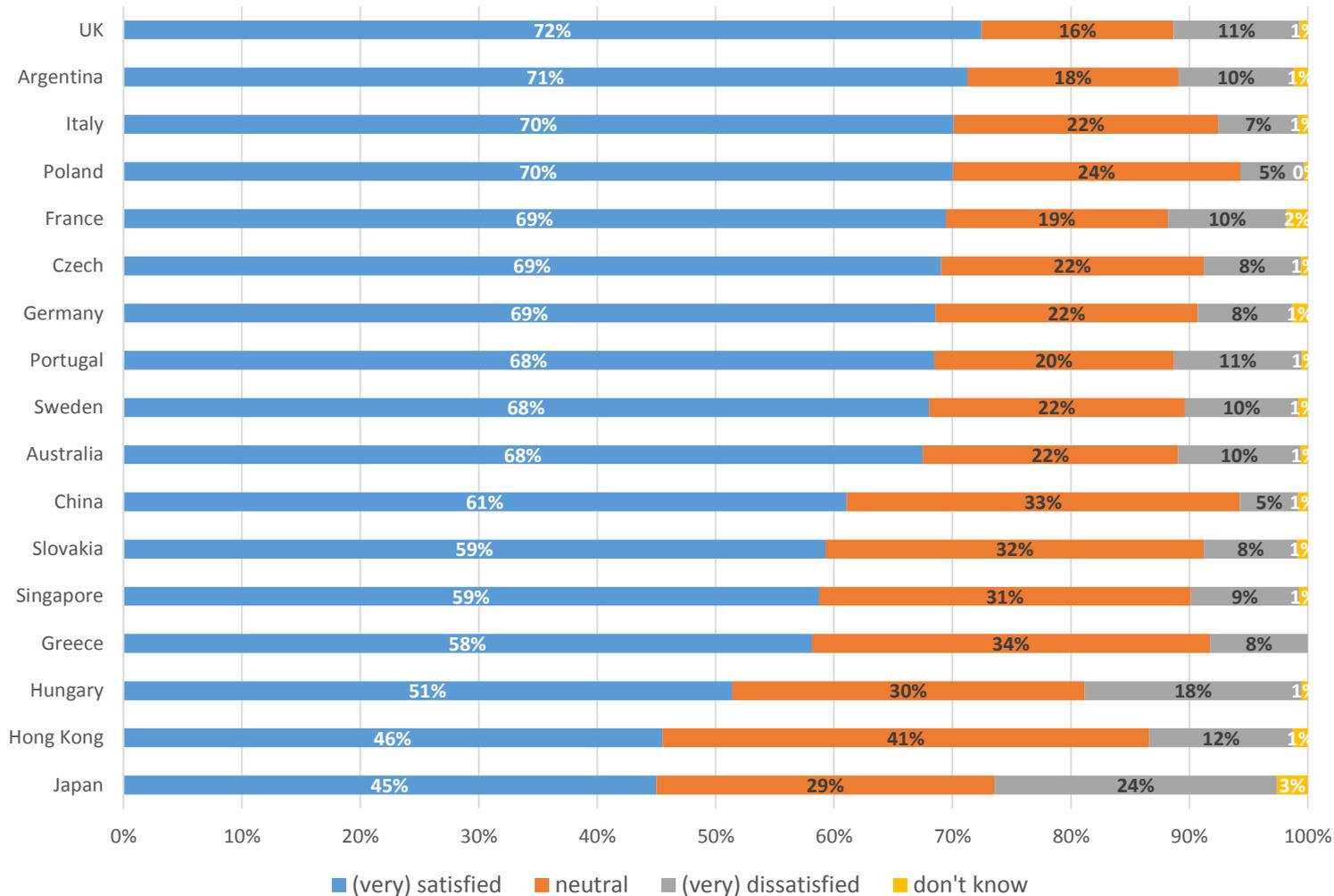
Job satisfaction increased in Chile, Malaysia, Italy and the UK.

Job satisfaction decreased Greece, India, Hong Kong, Argentina, Poland and Germany.

Question:

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

# job satisfaction lowest in Japan; one quarter is dissatisfied



Question:

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

# ABOUT THE Randstad Workmonitor

# background to the 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 four 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 the 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 fourth survey of 2015 was conducted between 21 October and 4 November 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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