

global report Randstad Workmonitor wave 2, 2015

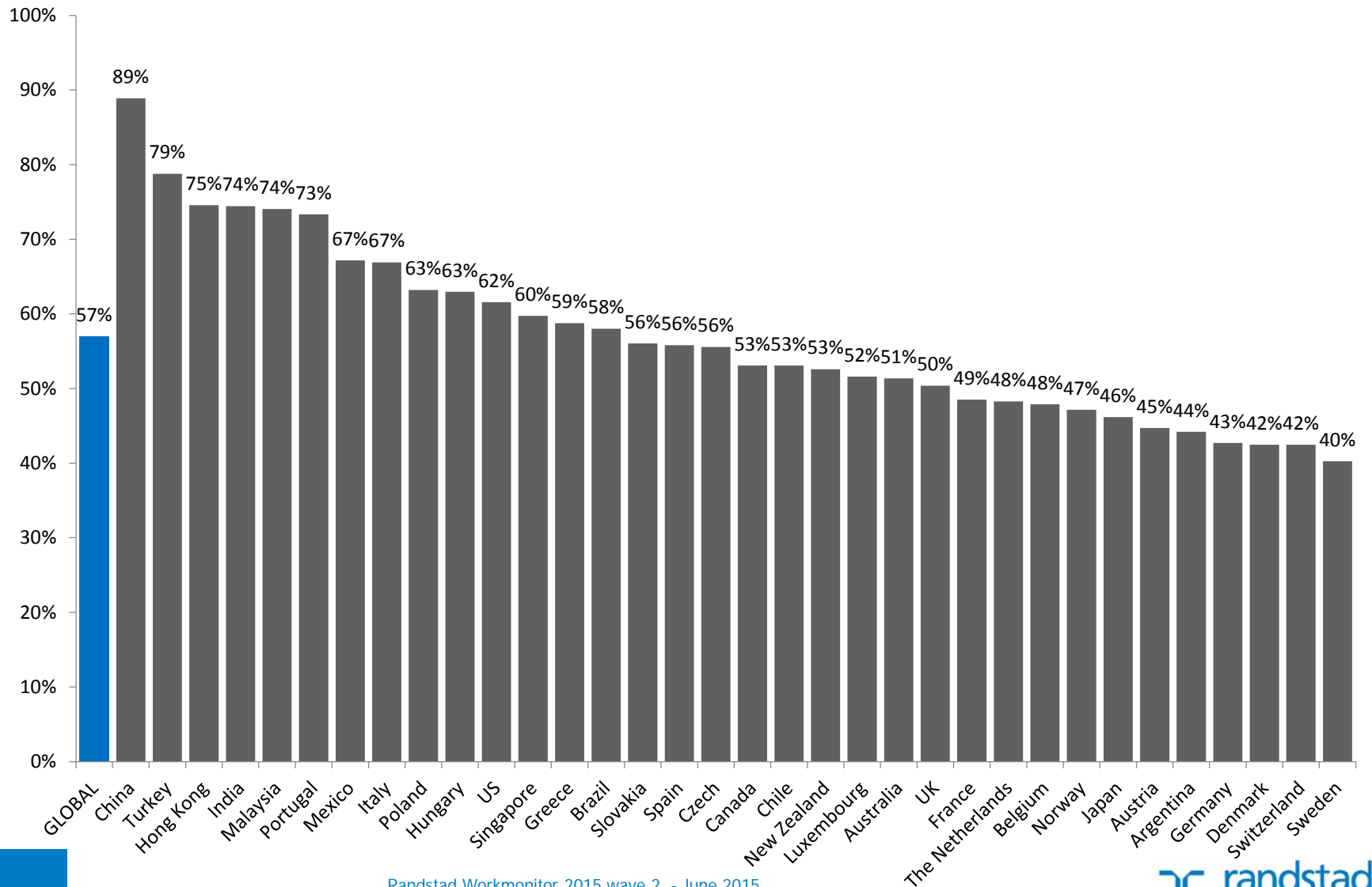
working hours vs. private time: blurred lines

incl. quarterly mobility, job change and job satisfaction

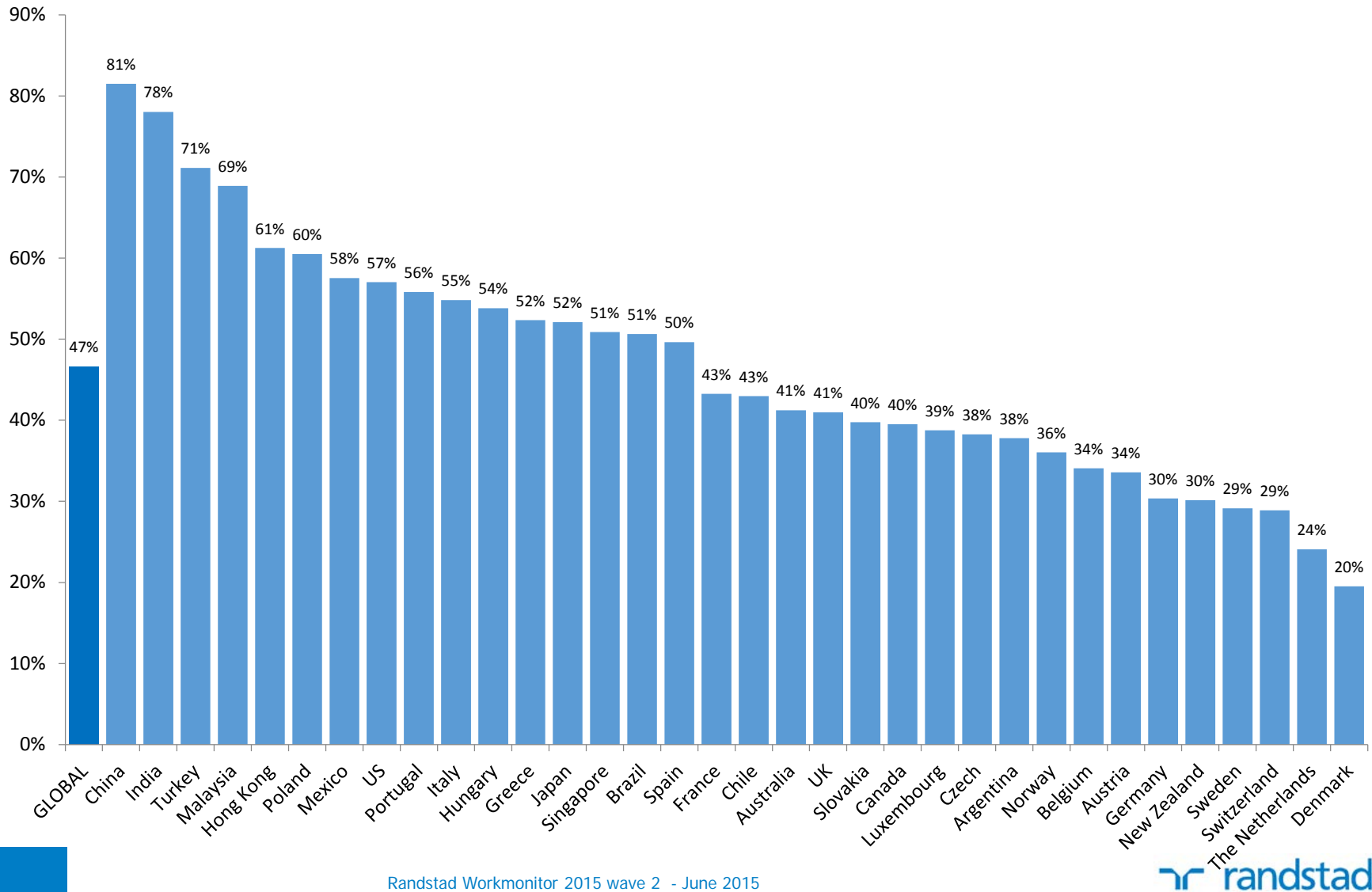
Group Communications
Randstad Holding nv
June 2015



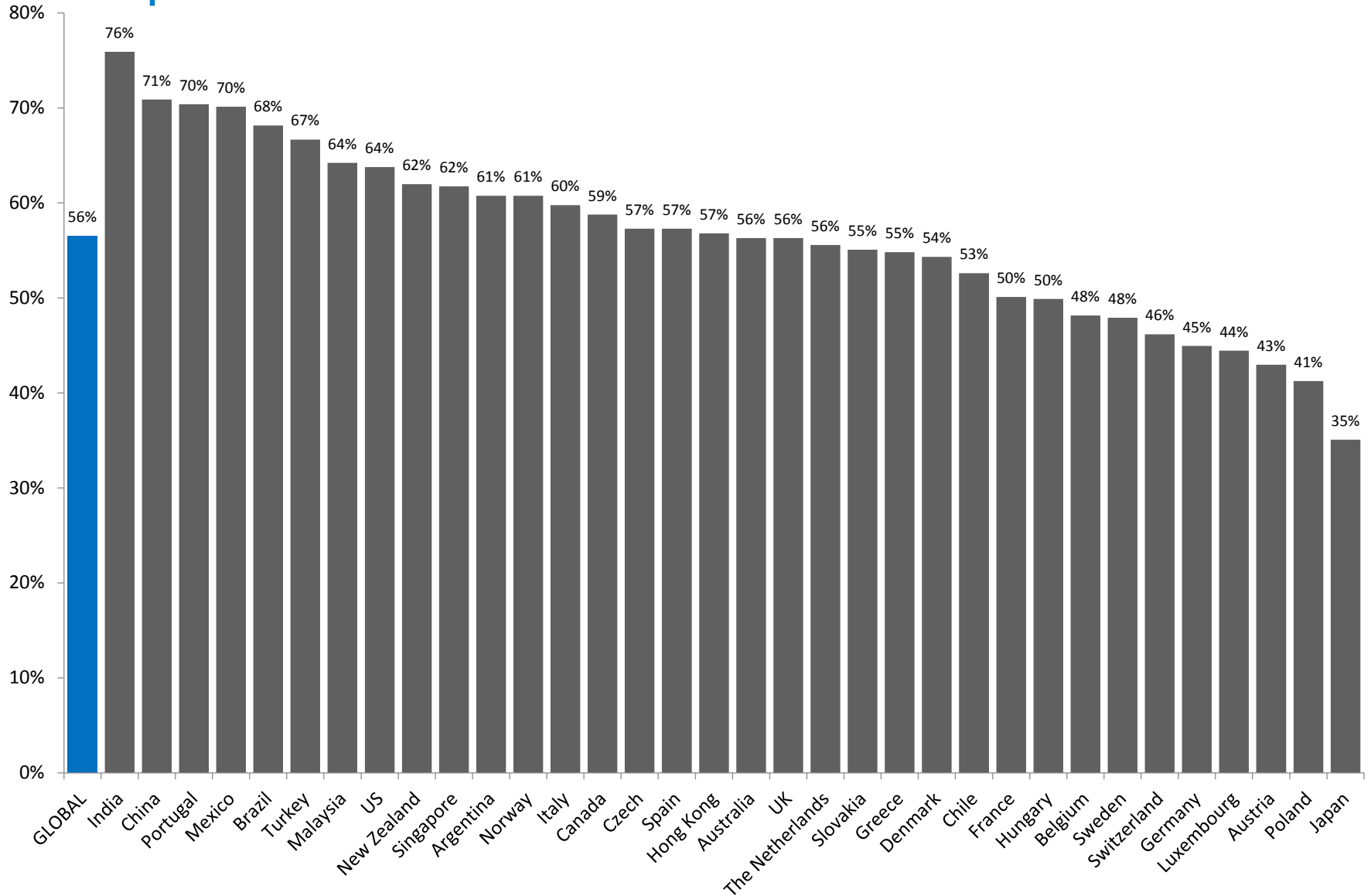
57% say their employer expects them to be available outside regular office hours



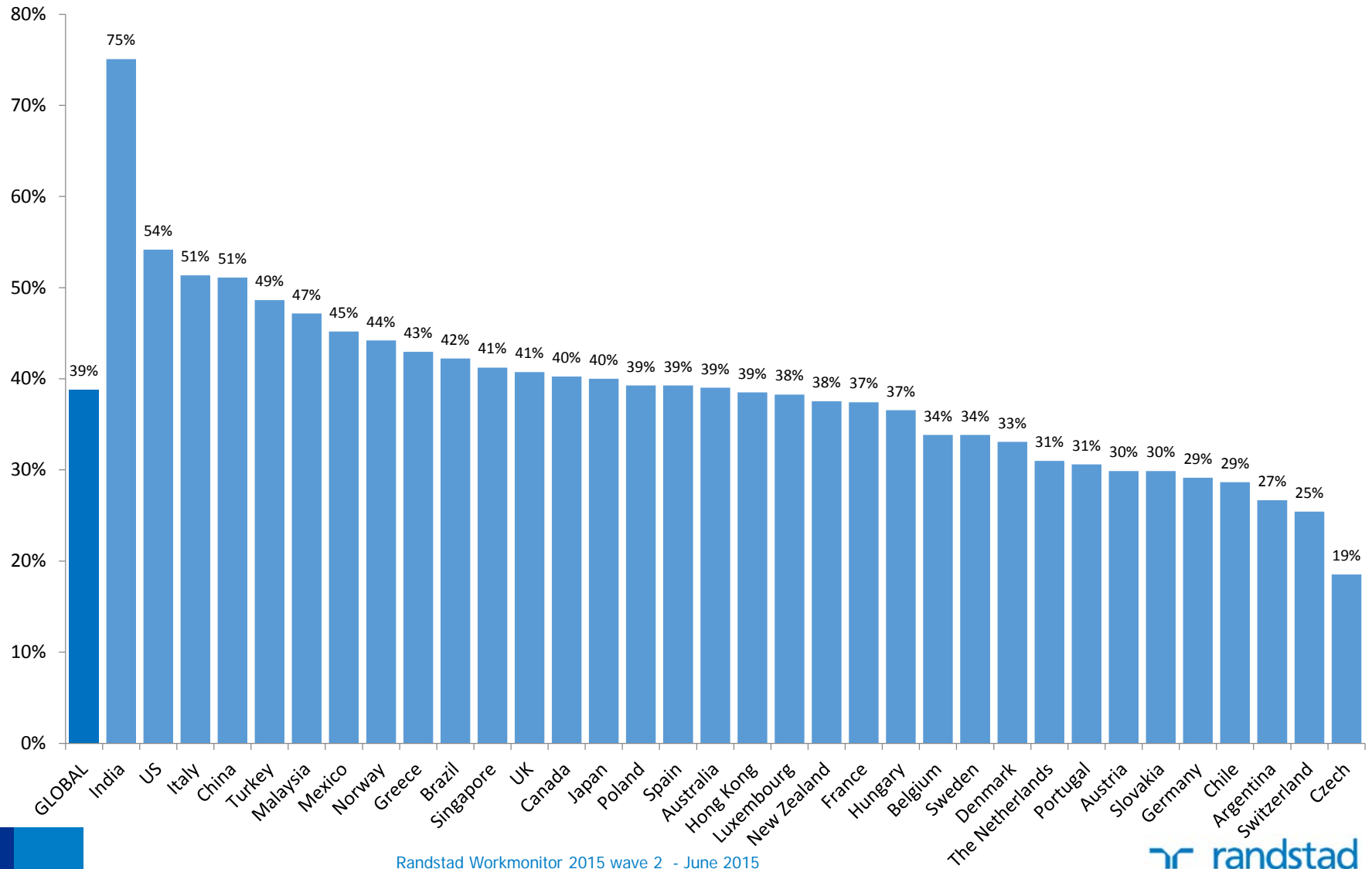
47% say their employer expects them to be available by phone and email during holidays



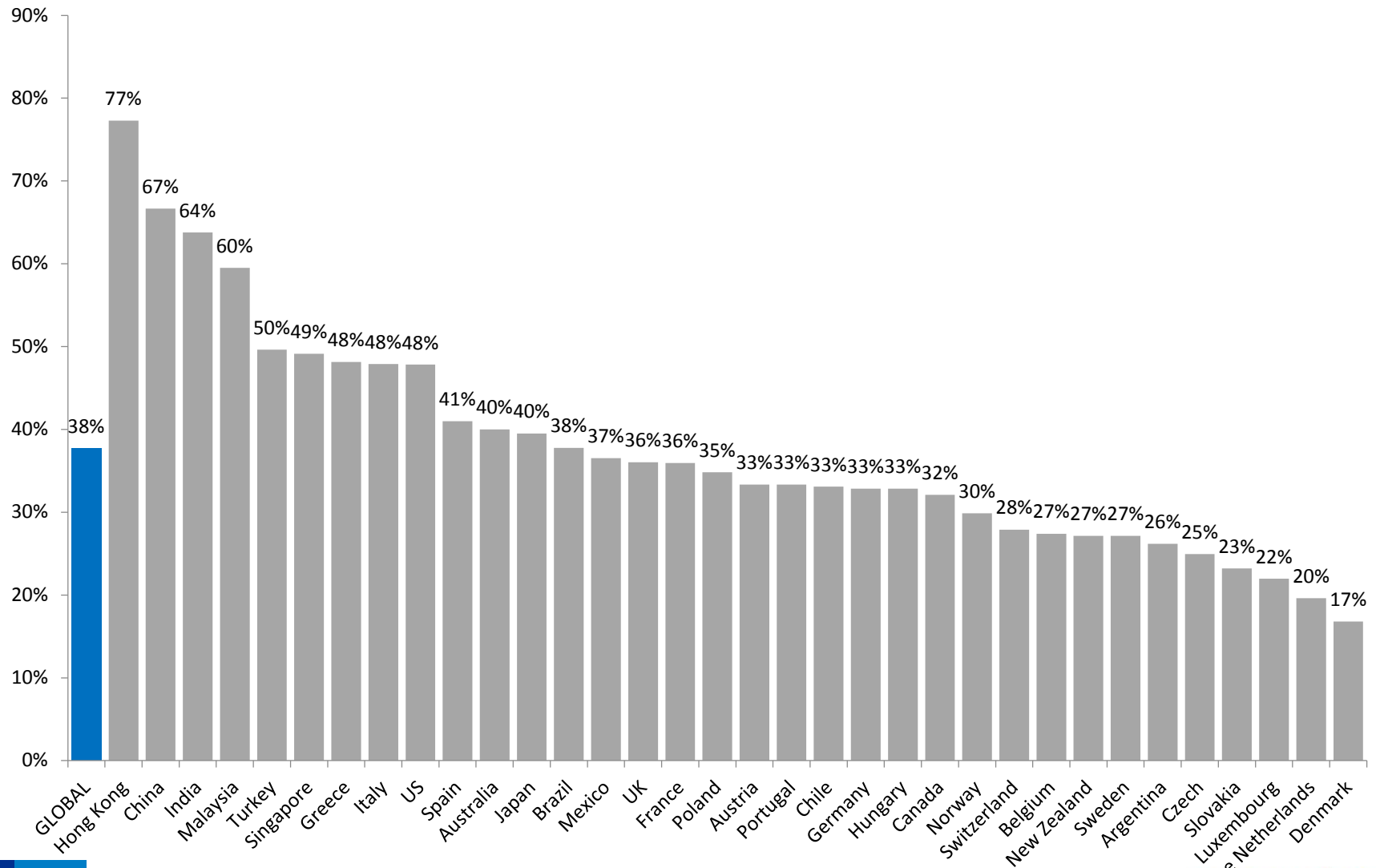
56% do not mind handling work-related matters in their private time



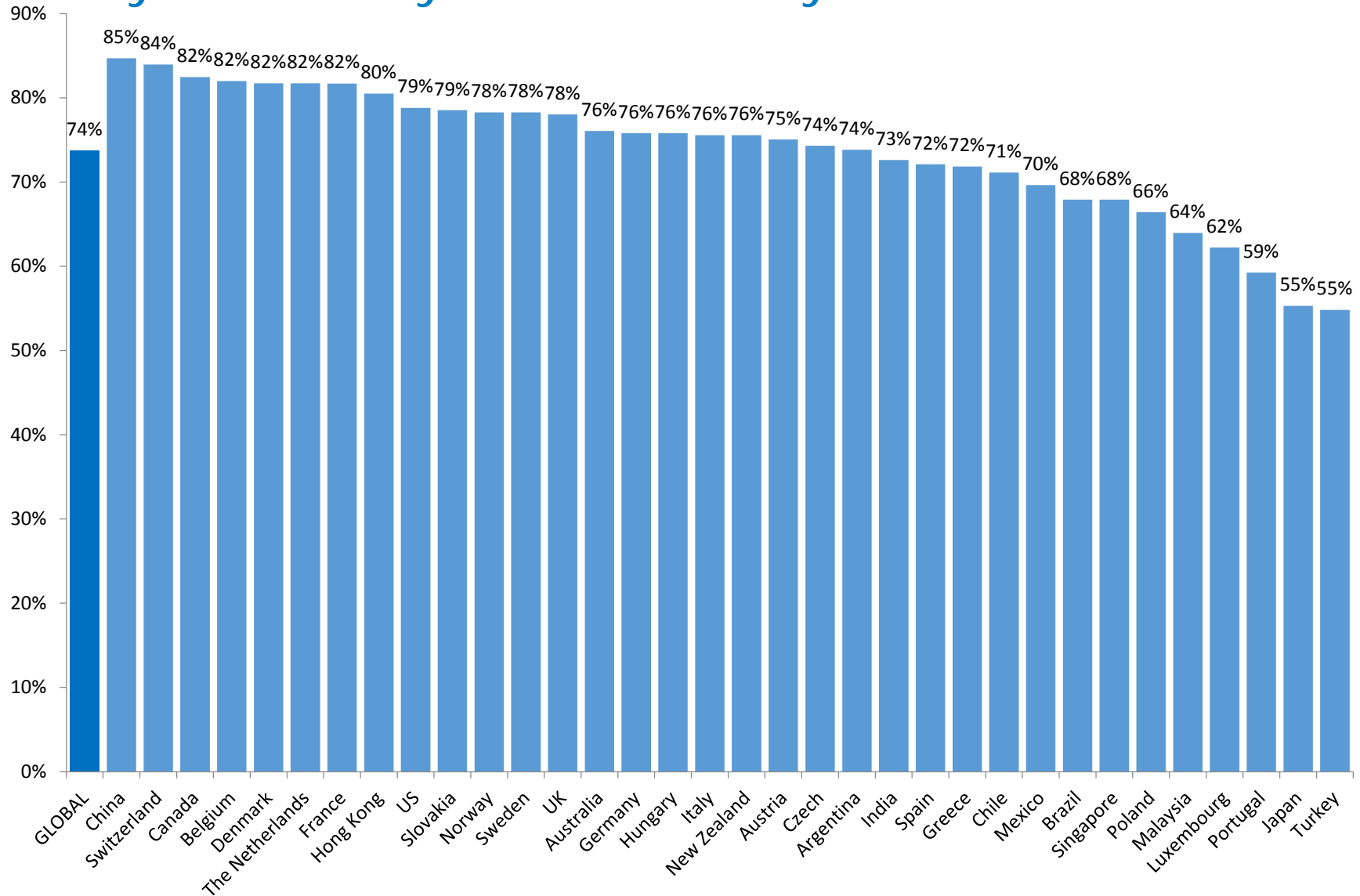
39% handle work-related matters during holidays because they like to stay involved



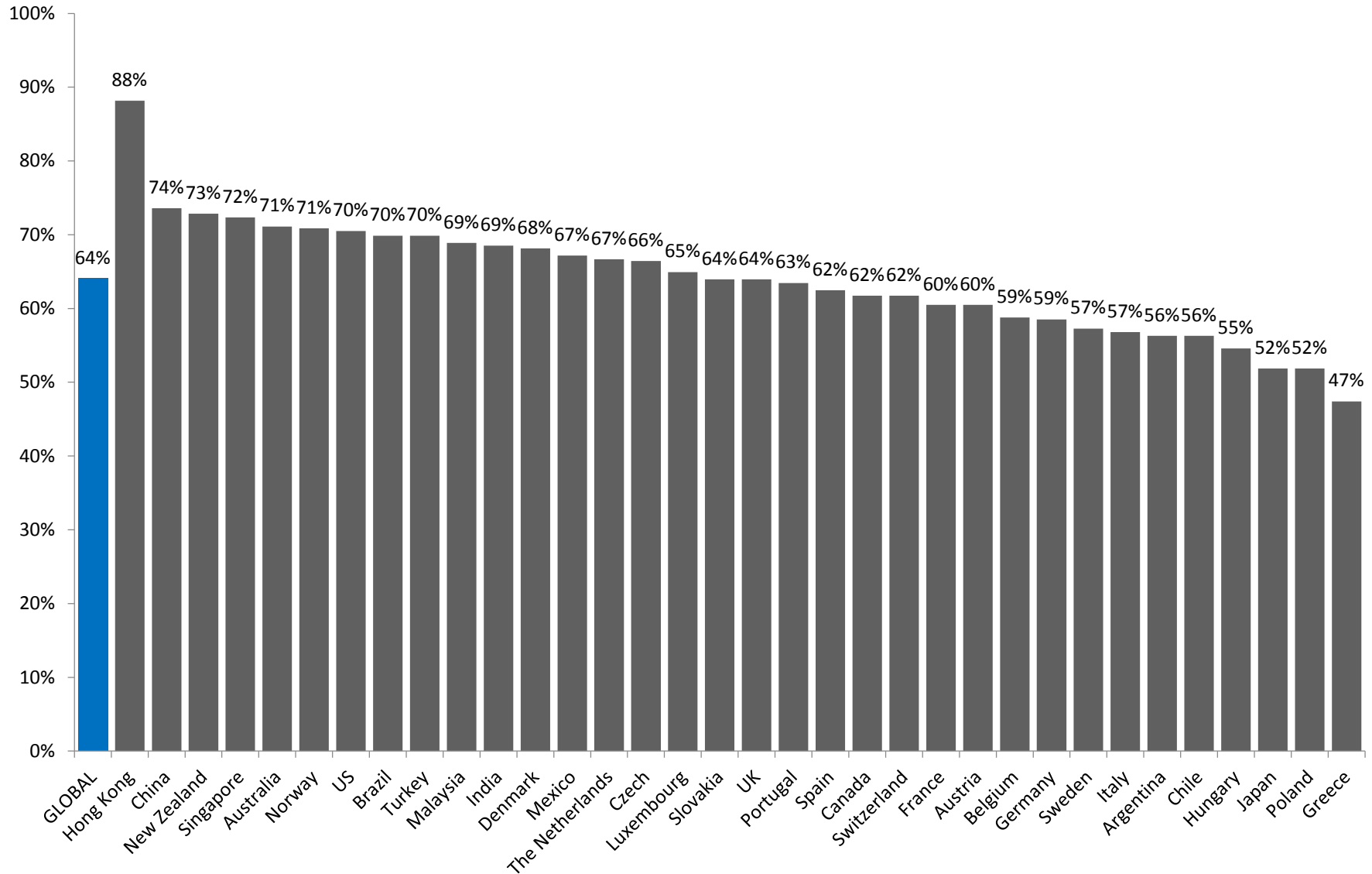
38% feel pressured to respond to work-related calls and emails when they are on holiday



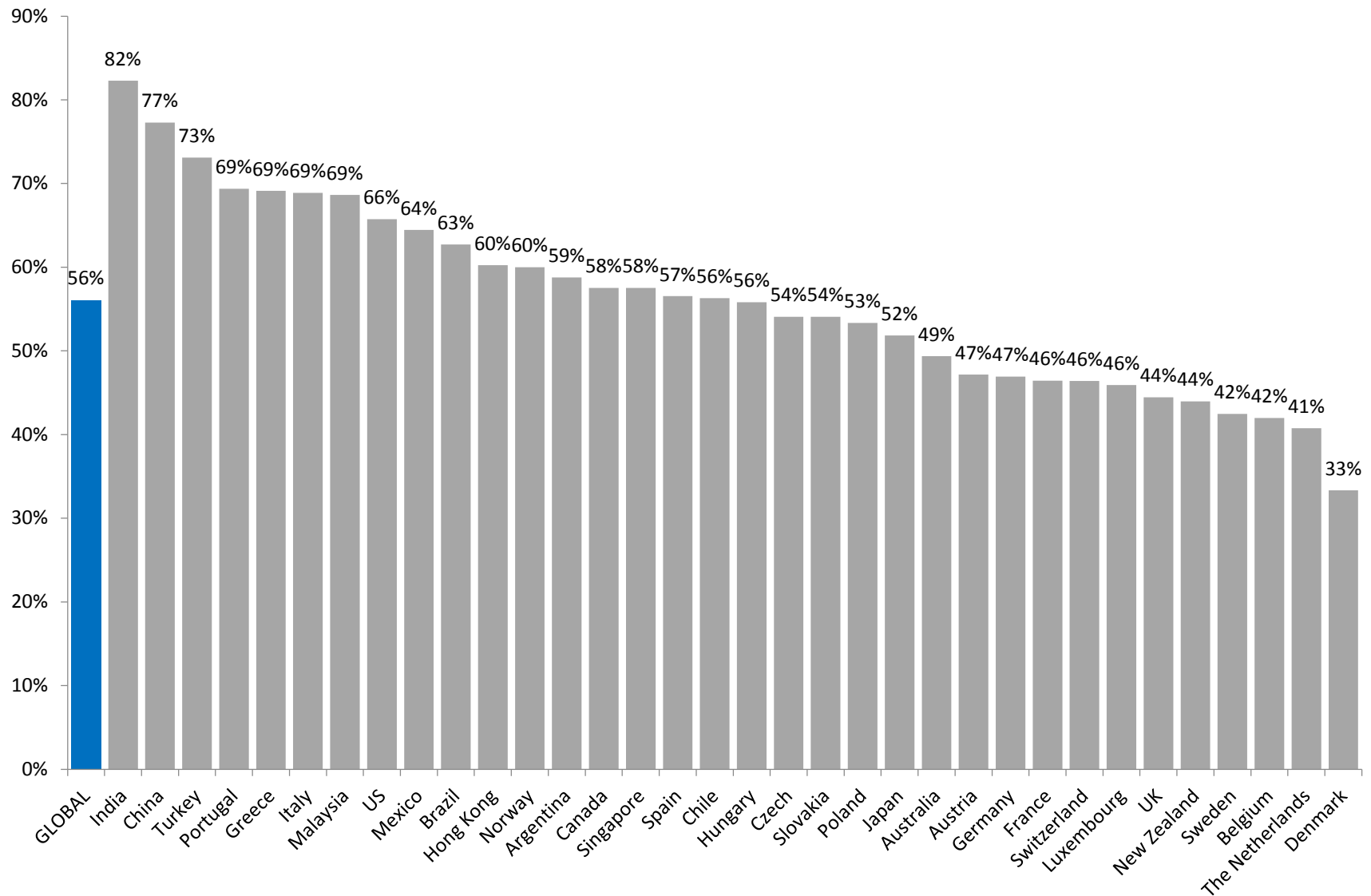
74% agree that they are able to let go of work easily when they are on holiday



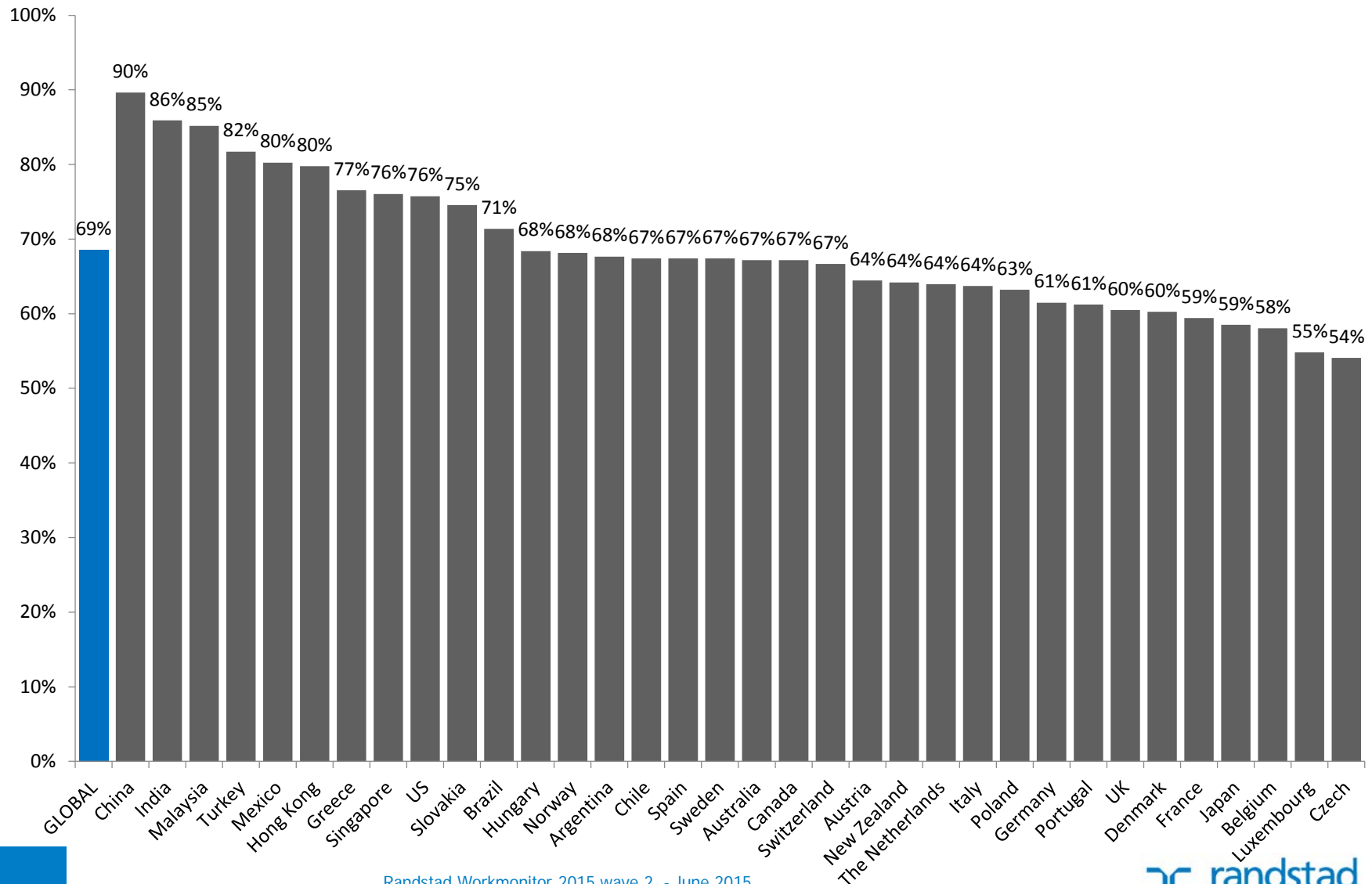
64% sometimes deal with private matters during work hours



56% respond to work-related calls and emails immediately outside regular office hours

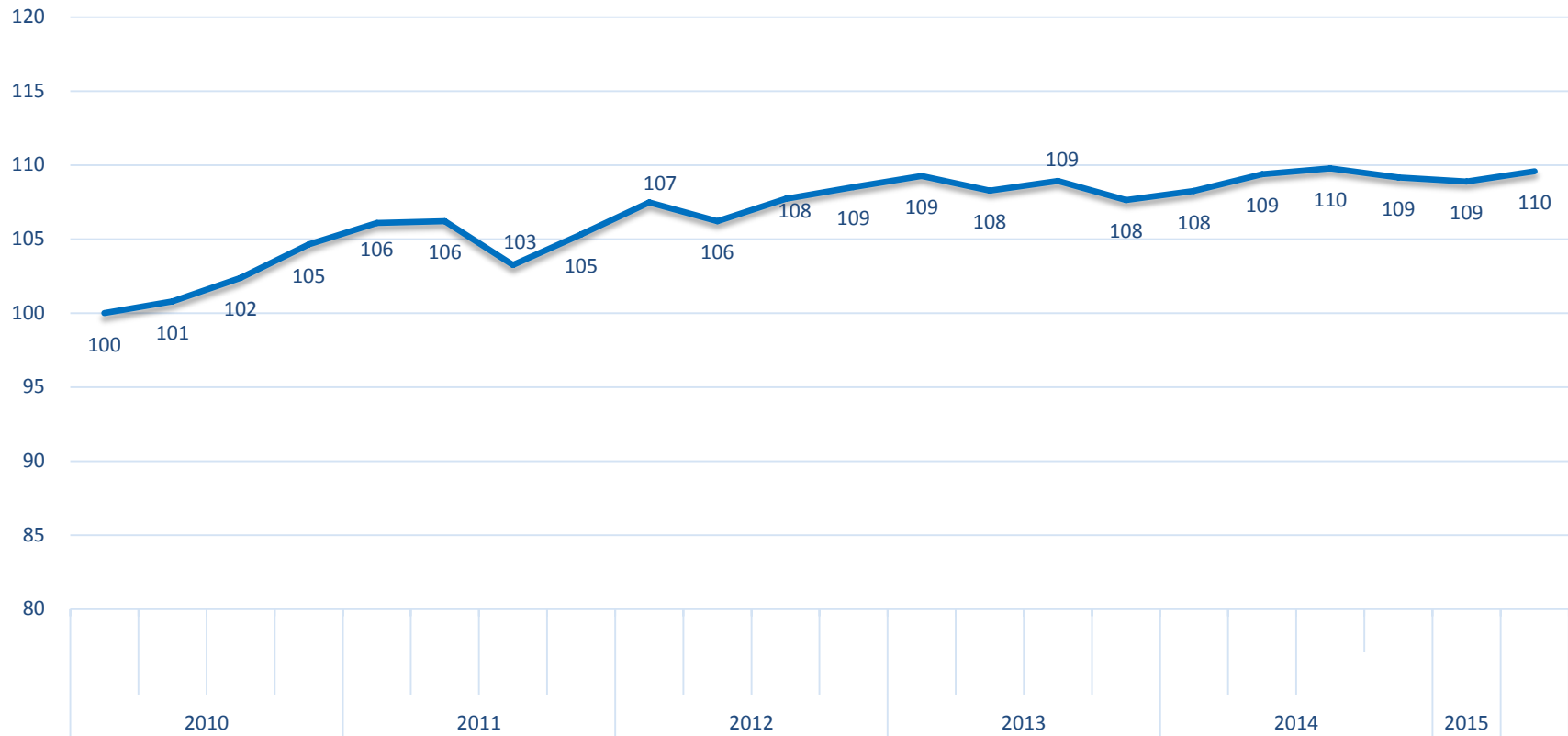


69% choose to respond to work-related calls and emails at a convenient time



MOBILITY INDEX

Mobility Index increased slightly to 110, moving sideways on the long-term

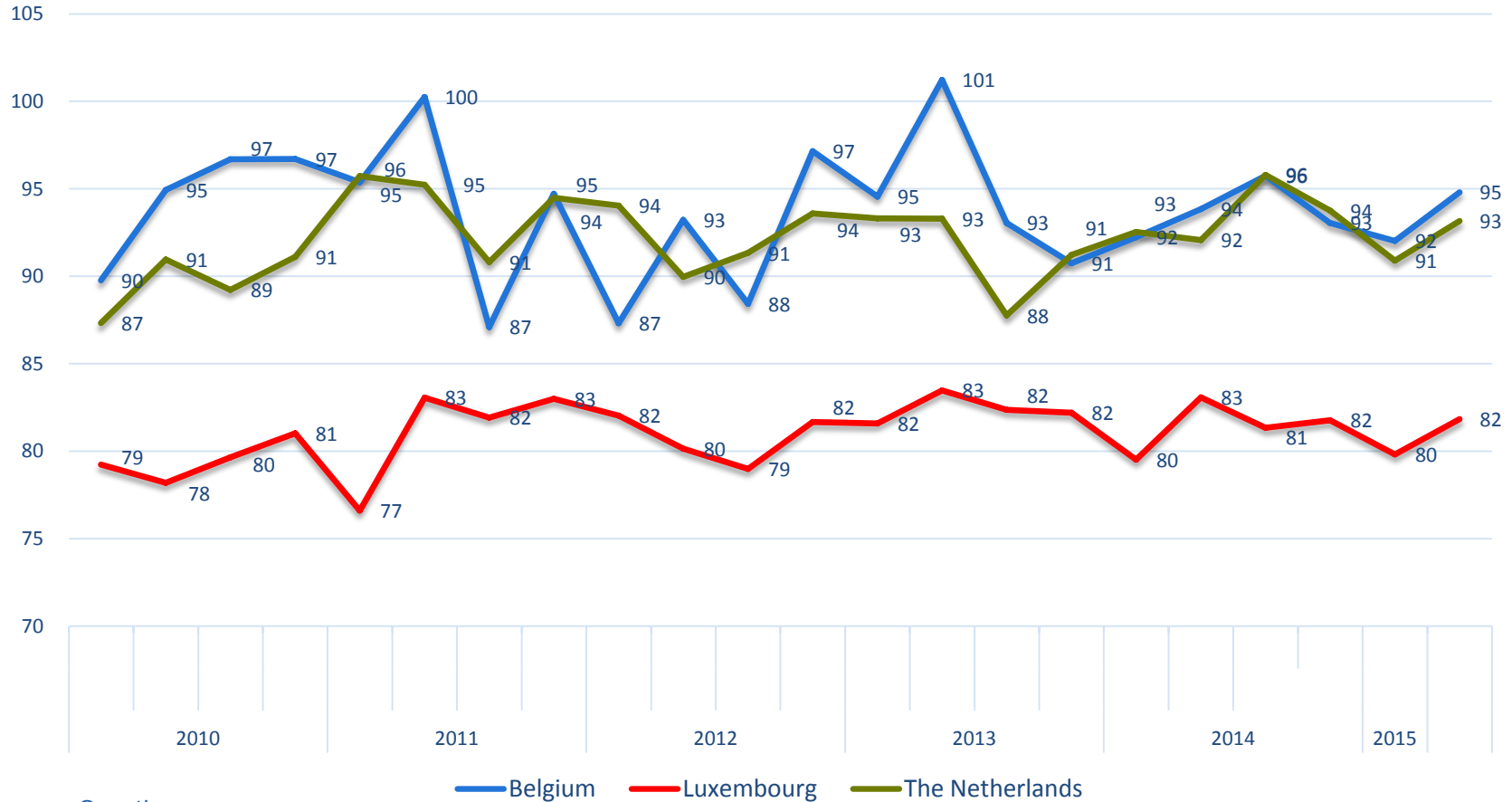


Question:

— Global

- 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?

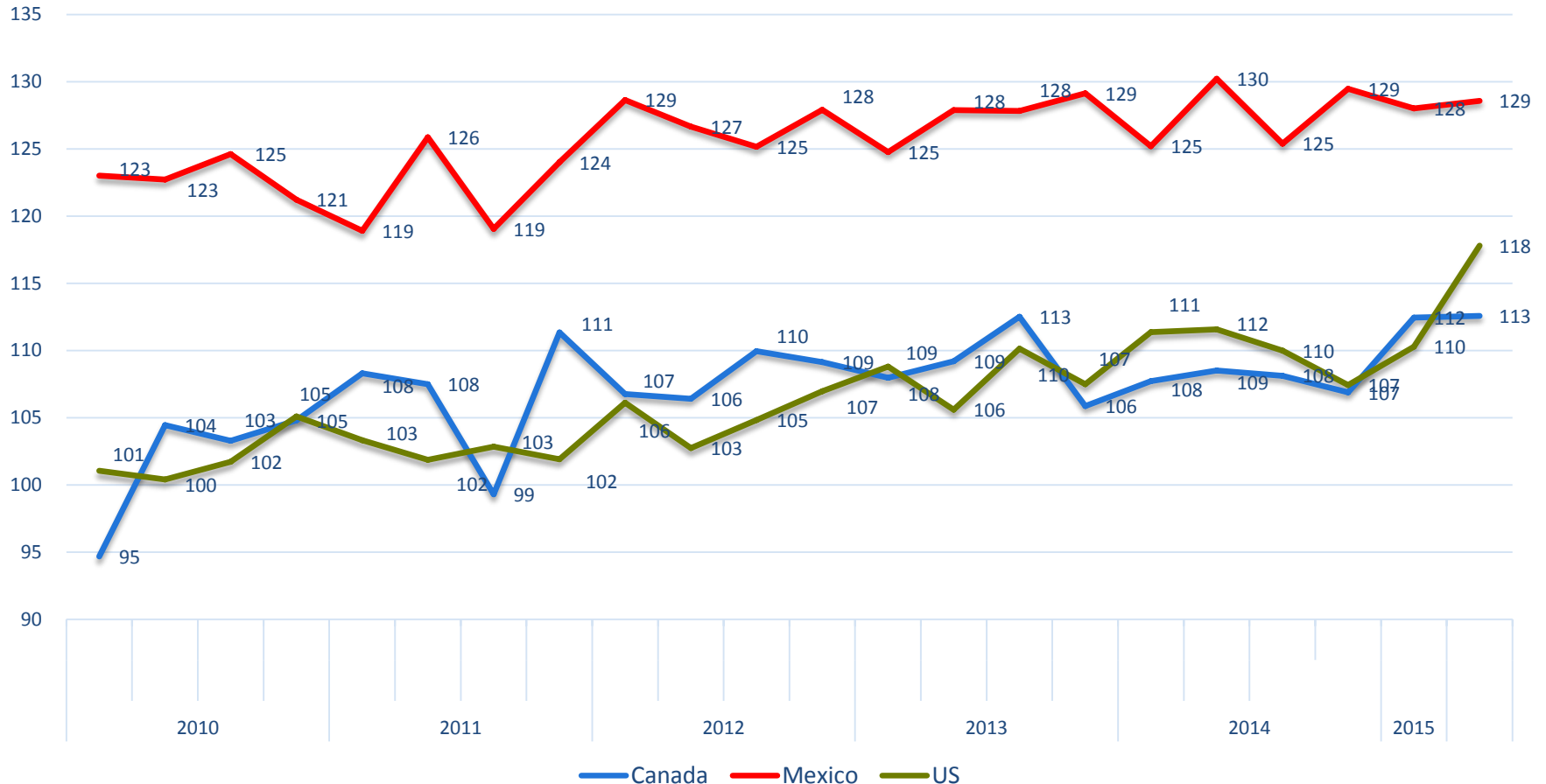
mobility Netherlands +3; Belgium & Luxembourg +2



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?

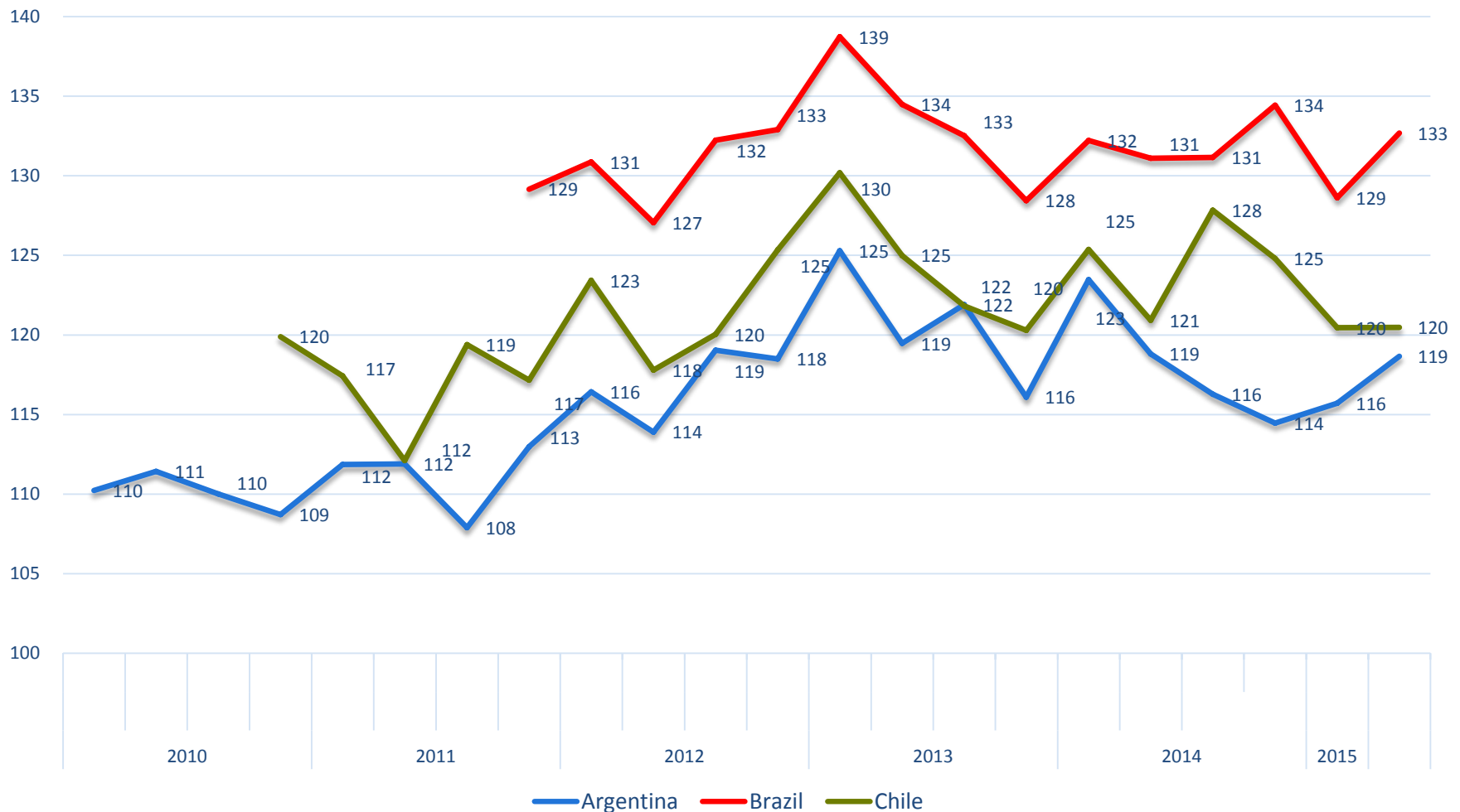
mobility jump in US (+8); Canada & Mexico at +1



Question:

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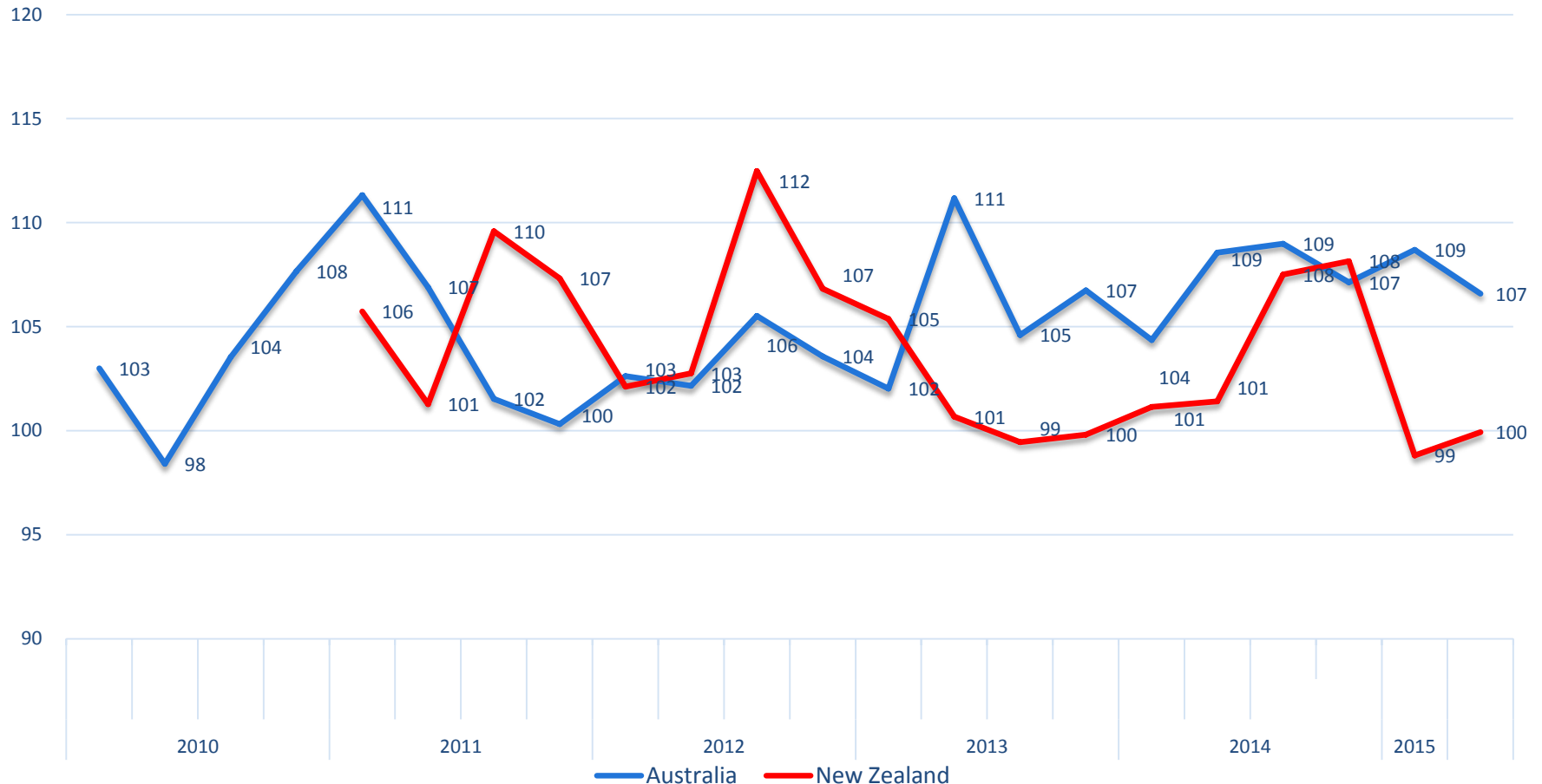
mobility Brazil +4; Argentina +3; Chile flat



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?

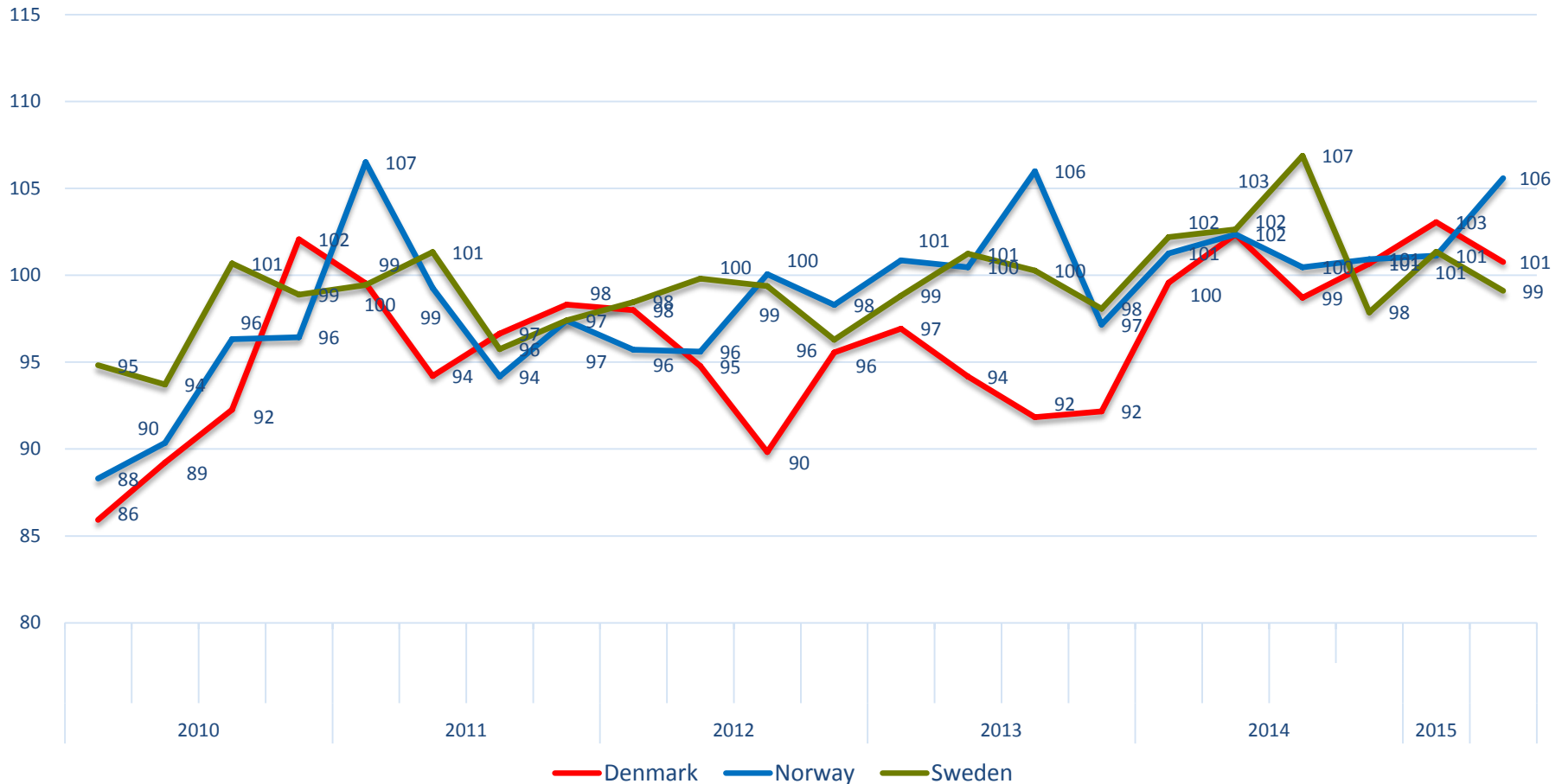
mobility New Zealand +1; Australia -2



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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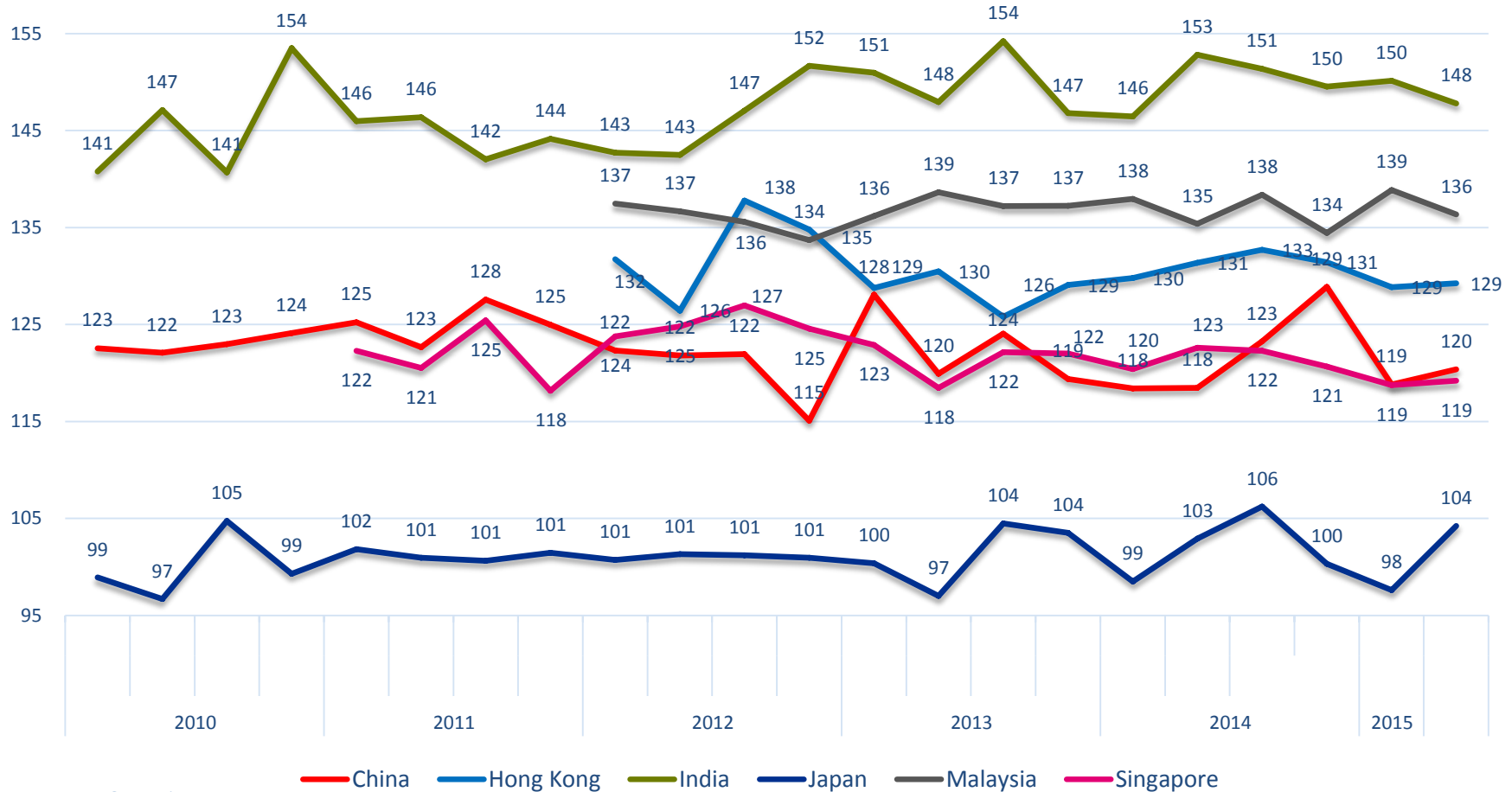
mobility rise Norway (+5); Sweden & Denmark -2



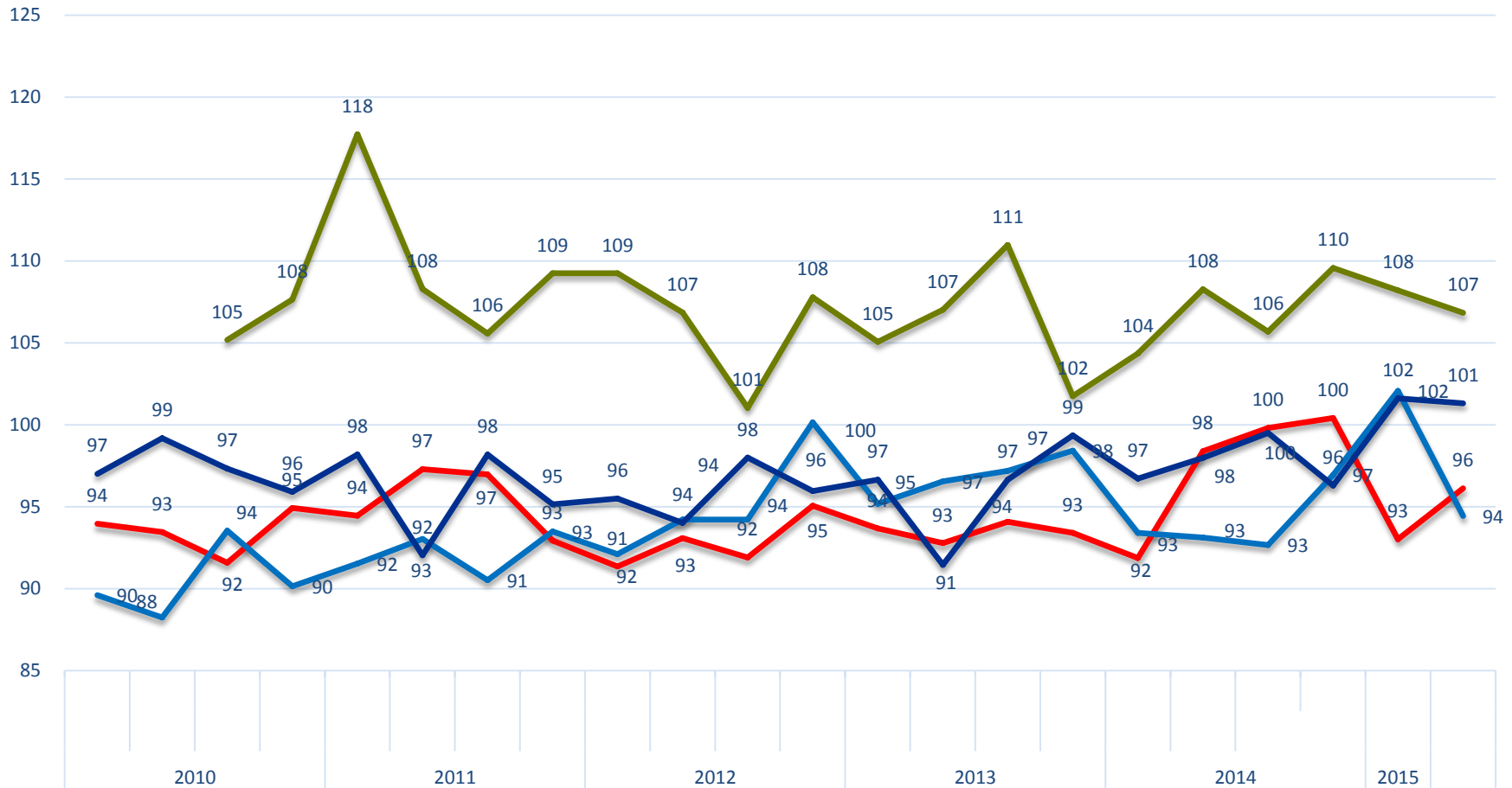
Question:

- 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 up in Japan (+6); China +1; Malaysia -3;
India -2; Hong Kong & Singapore flat



mobility drops in Hungary (-8); Poland & Slovakia at -1; Czech Republic +3

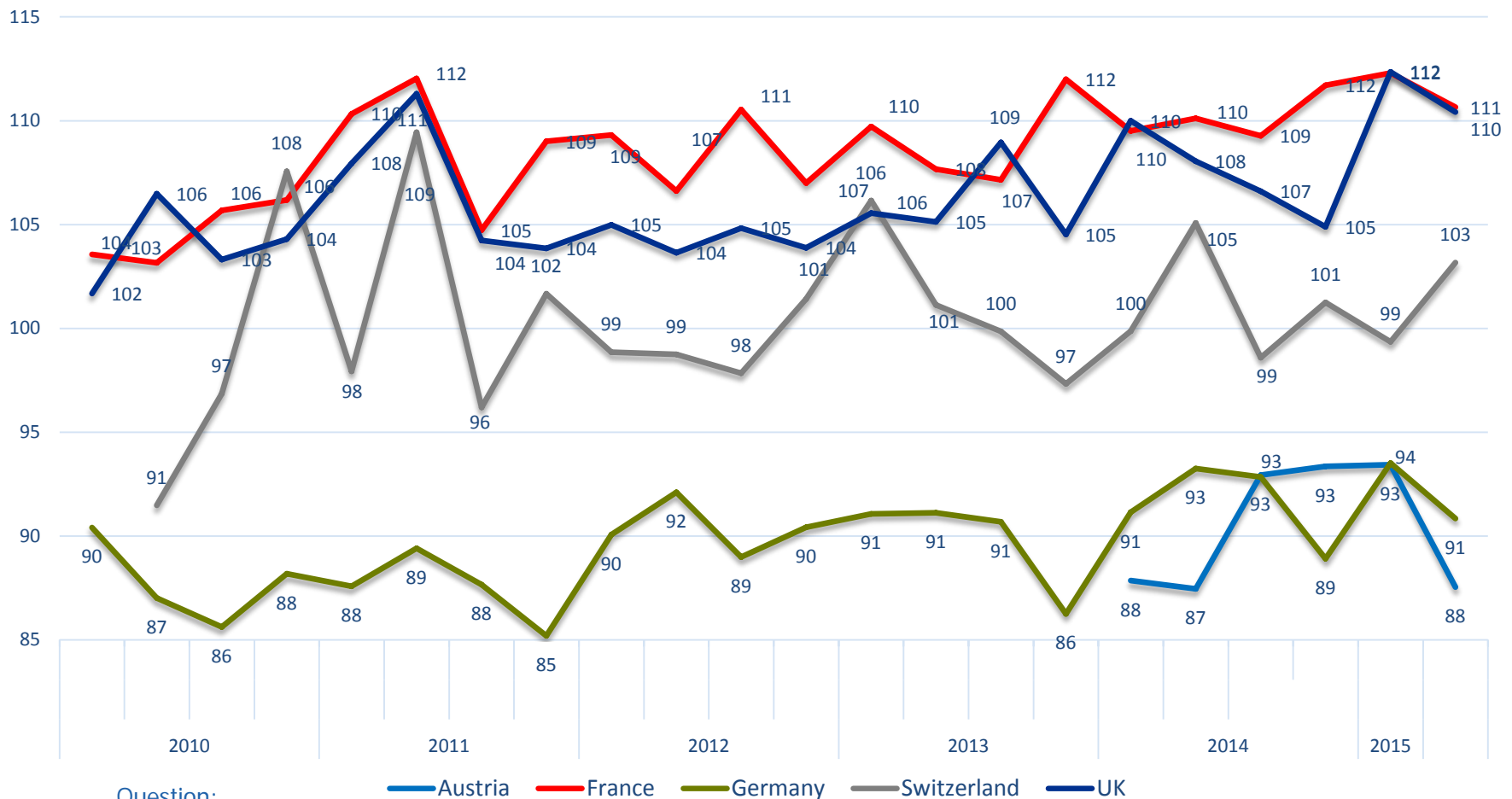


Question:

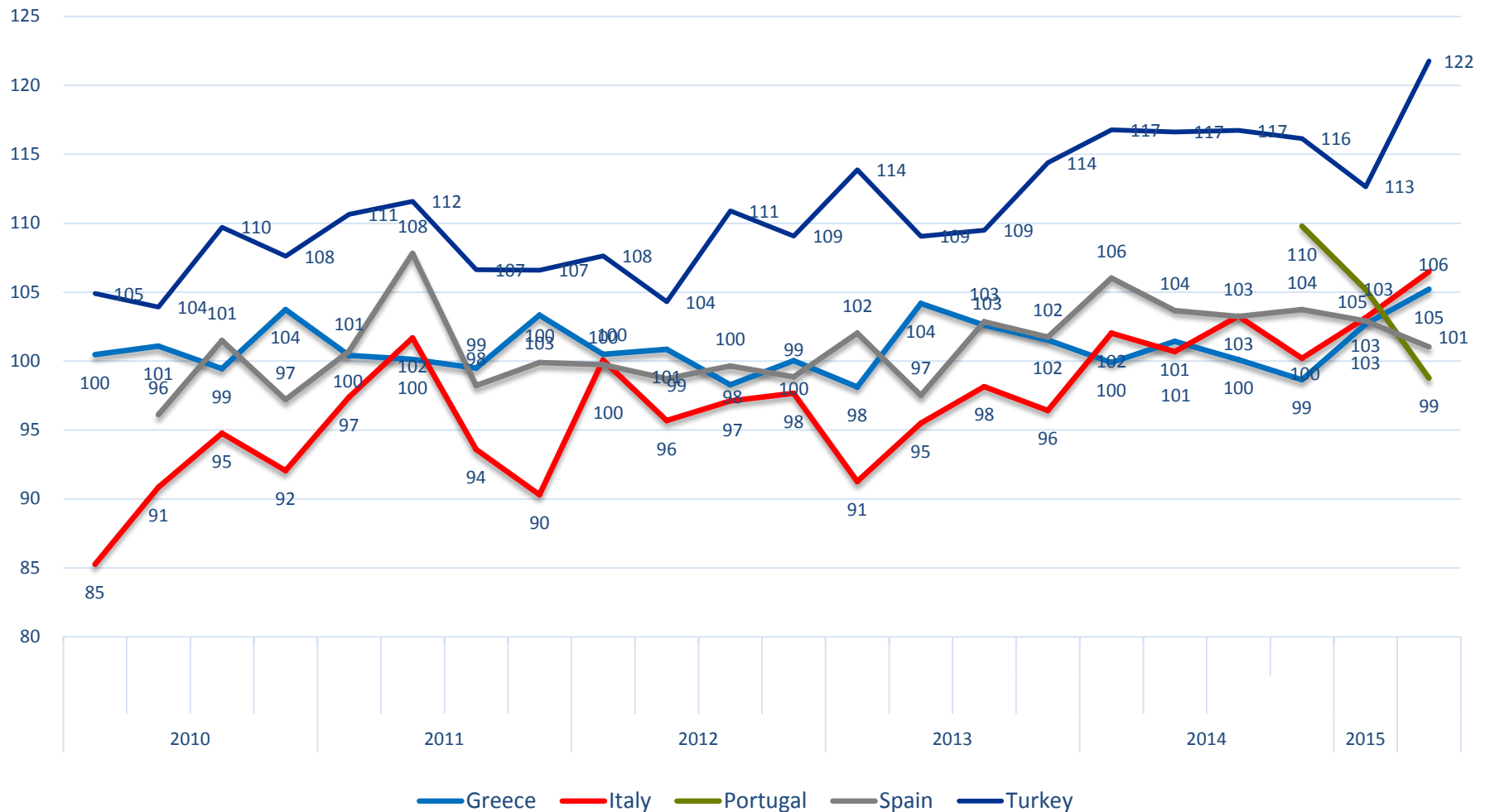
— Czech — Hungary — Poland — Slovakia

- 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 Switzerland (+4); down in Austria (-5), Germany (-3), UK (-2) & France (-1)



mobility jumps in Turkey (+9); Italy (+3); Greece (+2); down in Portugal (-6) & Spain (-2)

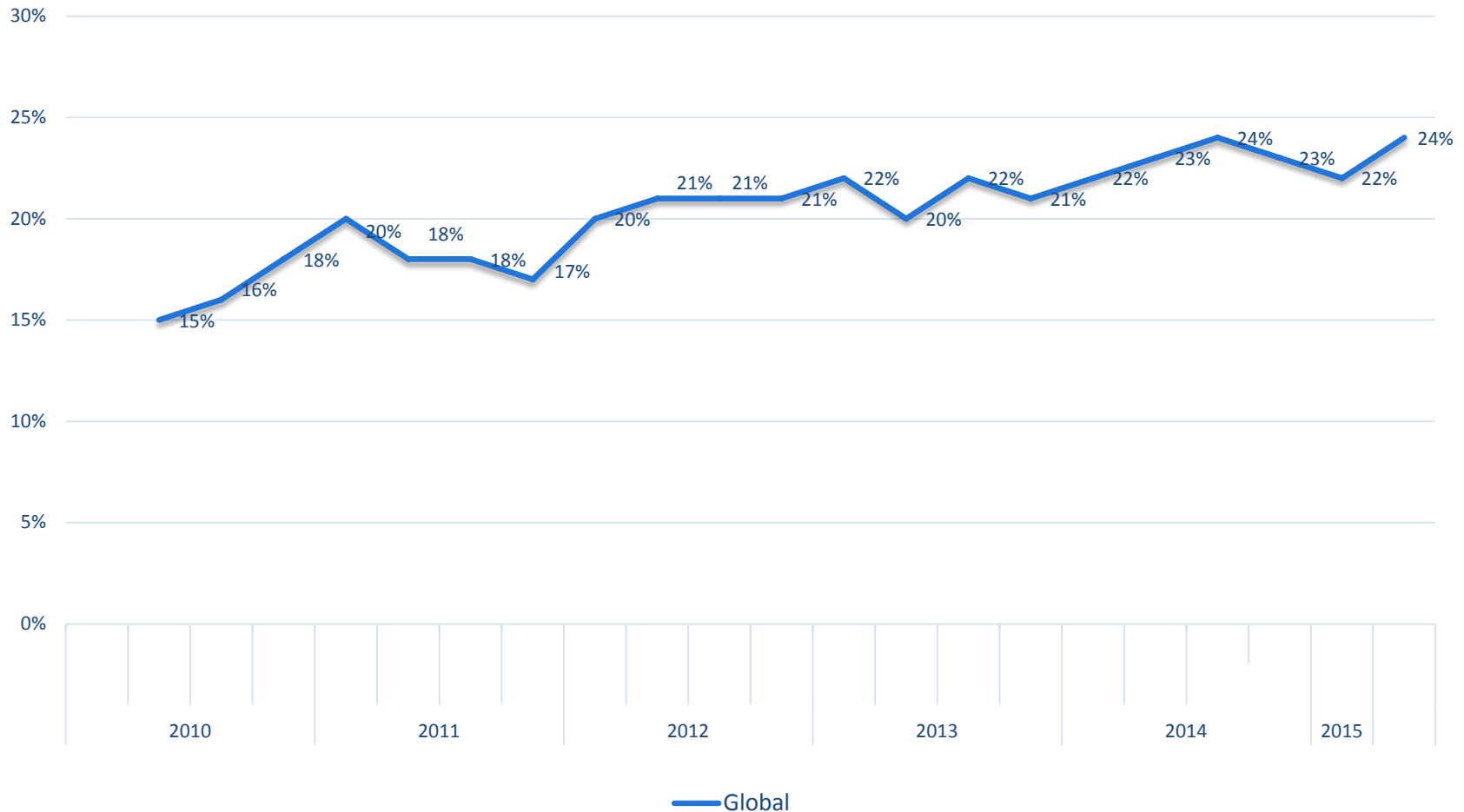


Question:

- 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

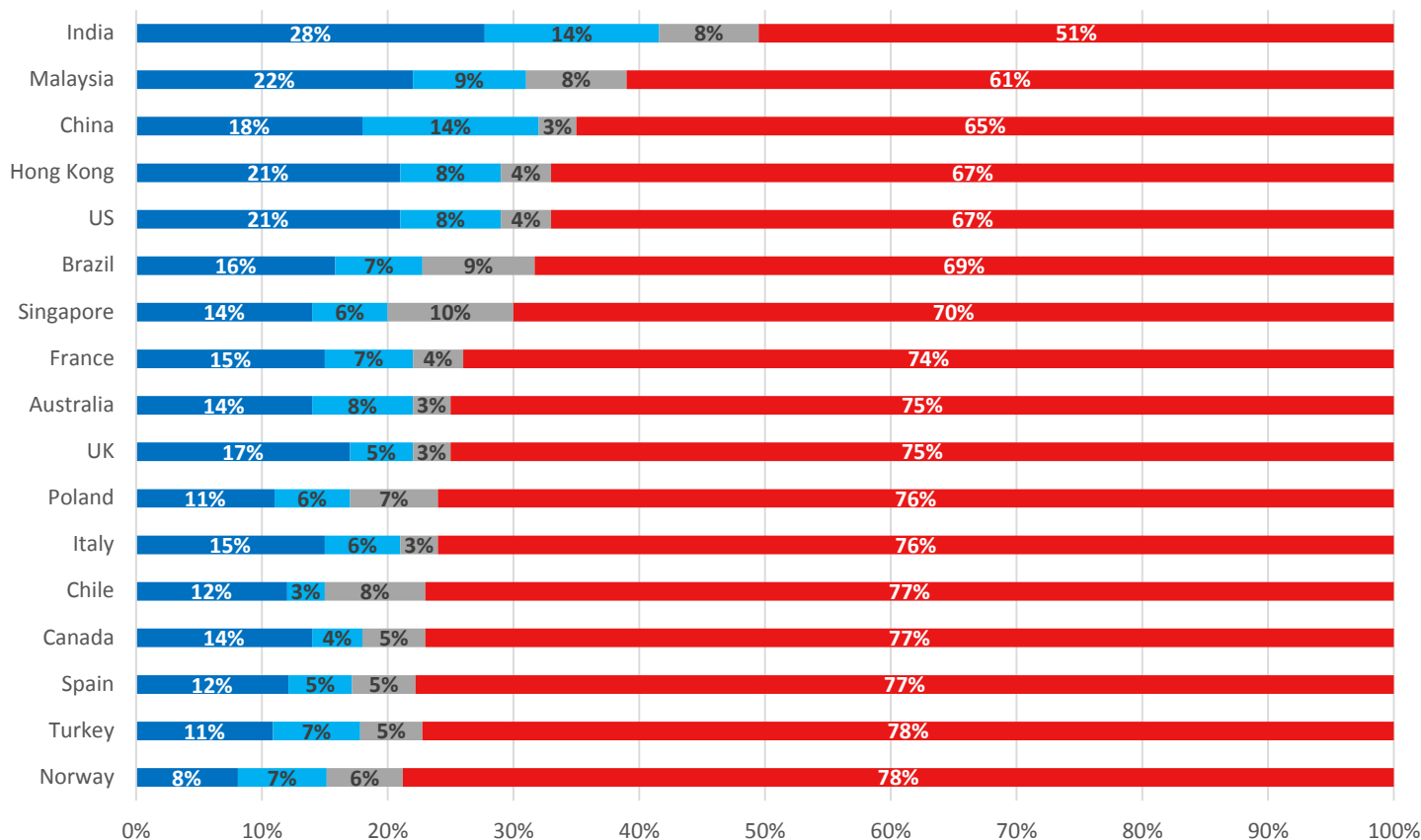
more people changing jobs: actual job change up to 24%



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



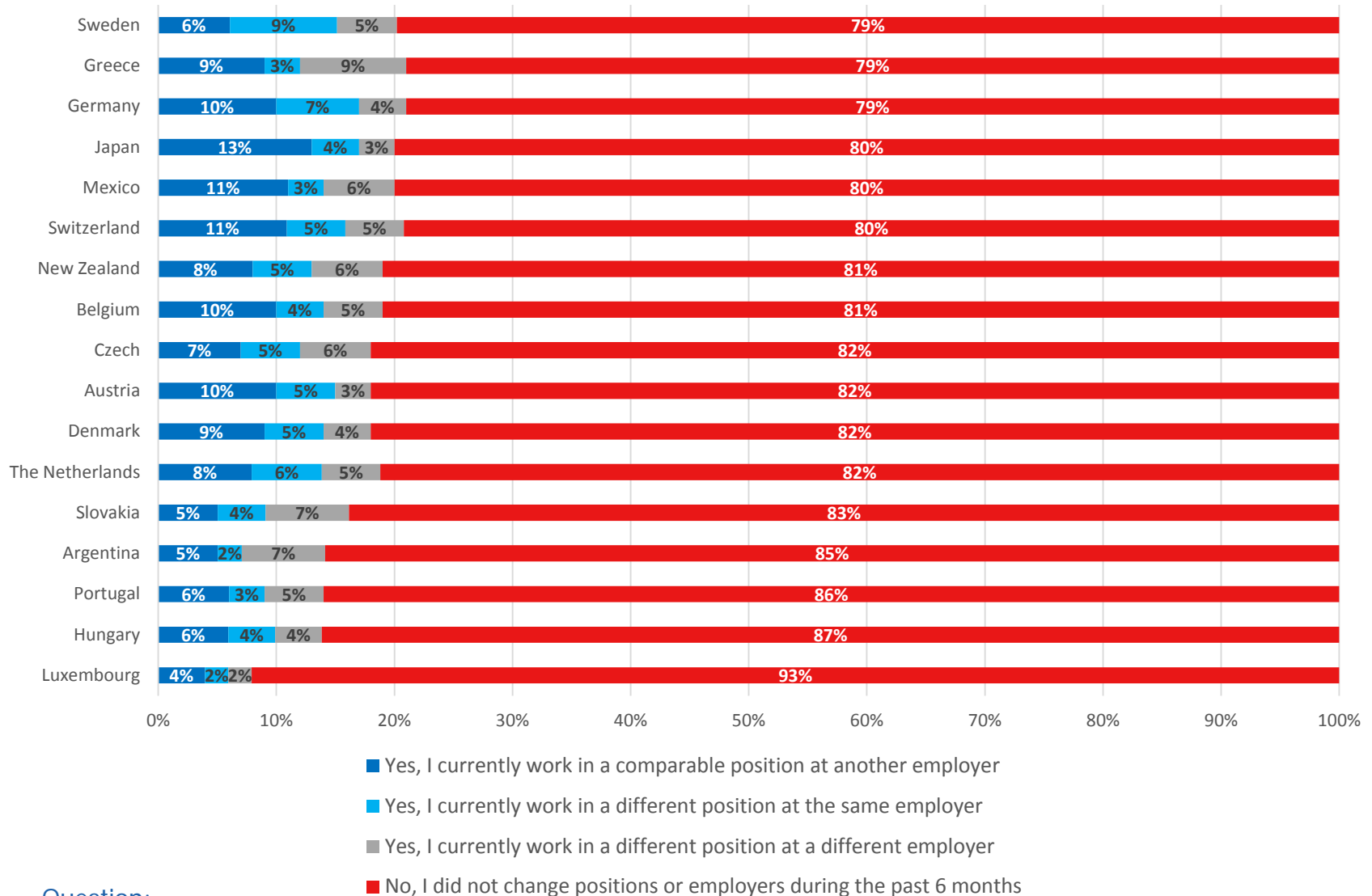
Job change dropped significantly in Malaysia, but is still high compared to other countries. In Hong Kong, Turkey and Slovakia job change also decreased. In the US, Chile, Belgium, China, Singapore, Brazil, Czech, France, Australia, Spain, Norway and Denmark the % of actual job change increased compared to the 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

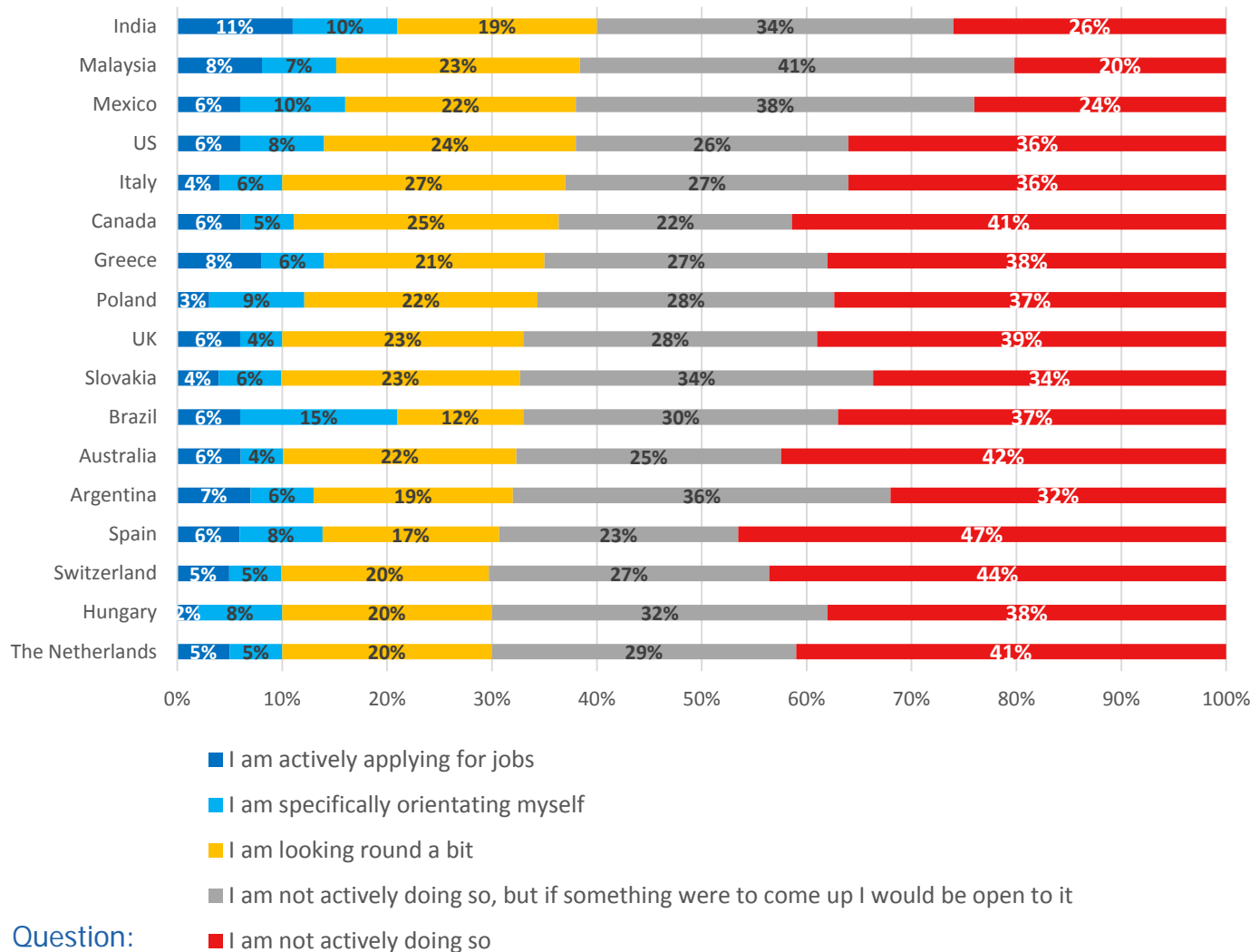


Question:

Have you changed jobs during the past six months?

JOB CHANGE APPETITE

India & Malaysia highest appetite for job change



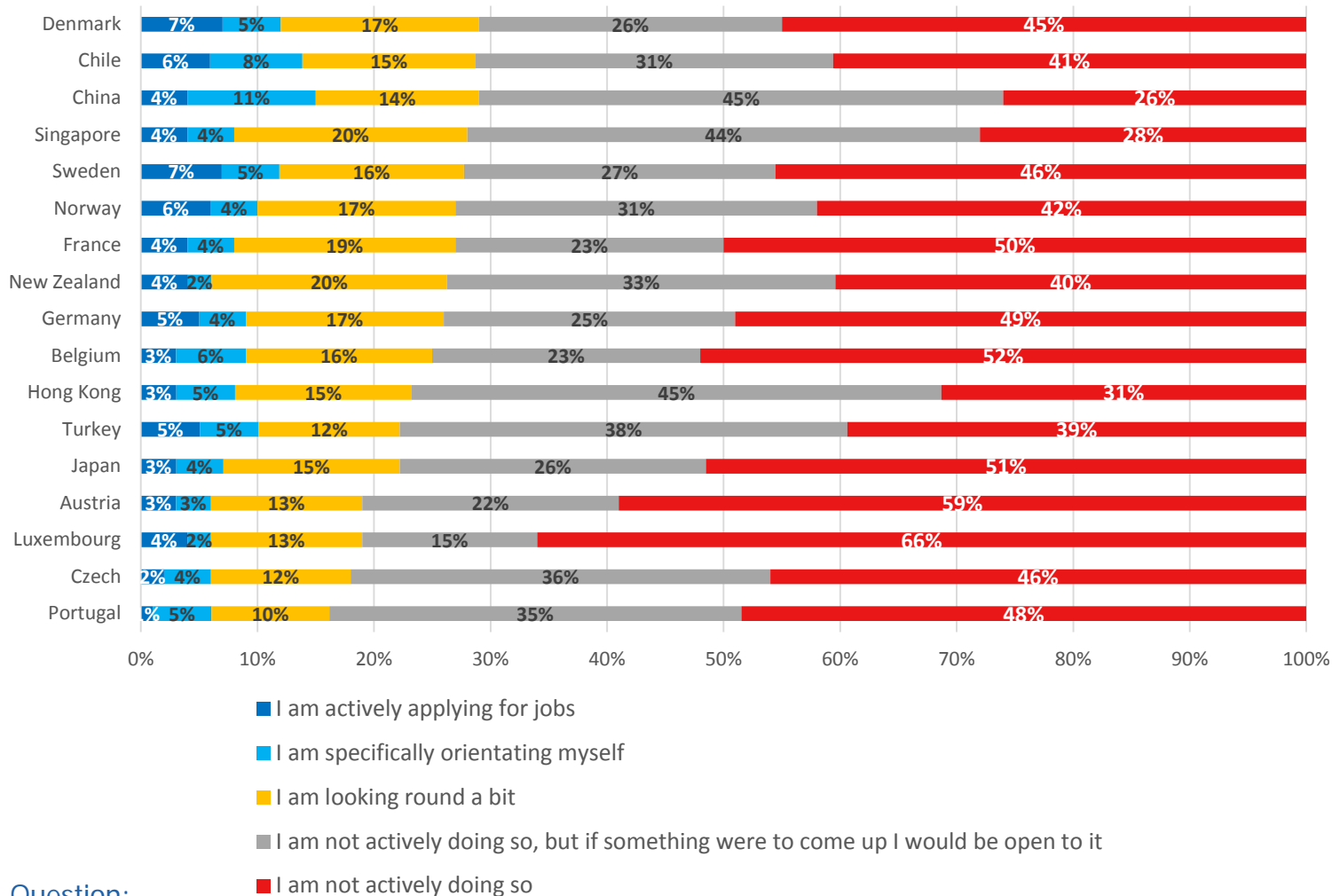
Compared to last quarter, the appetite to change jobs dropped in Sweden, Hungary and Austria, and there is also less appetite to actively look for a new job in India, Greece, Australia and France.

US, Canada, Argentina, The Netherlands, Denmark, Chile, Norway, New Zealand, Hong Kong, Japan and Portugal show a (slight) increase in appetite compared to last quarter.

Question:

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

Luxembourg, Austria, Belgium and Japan lowest appetite for job change

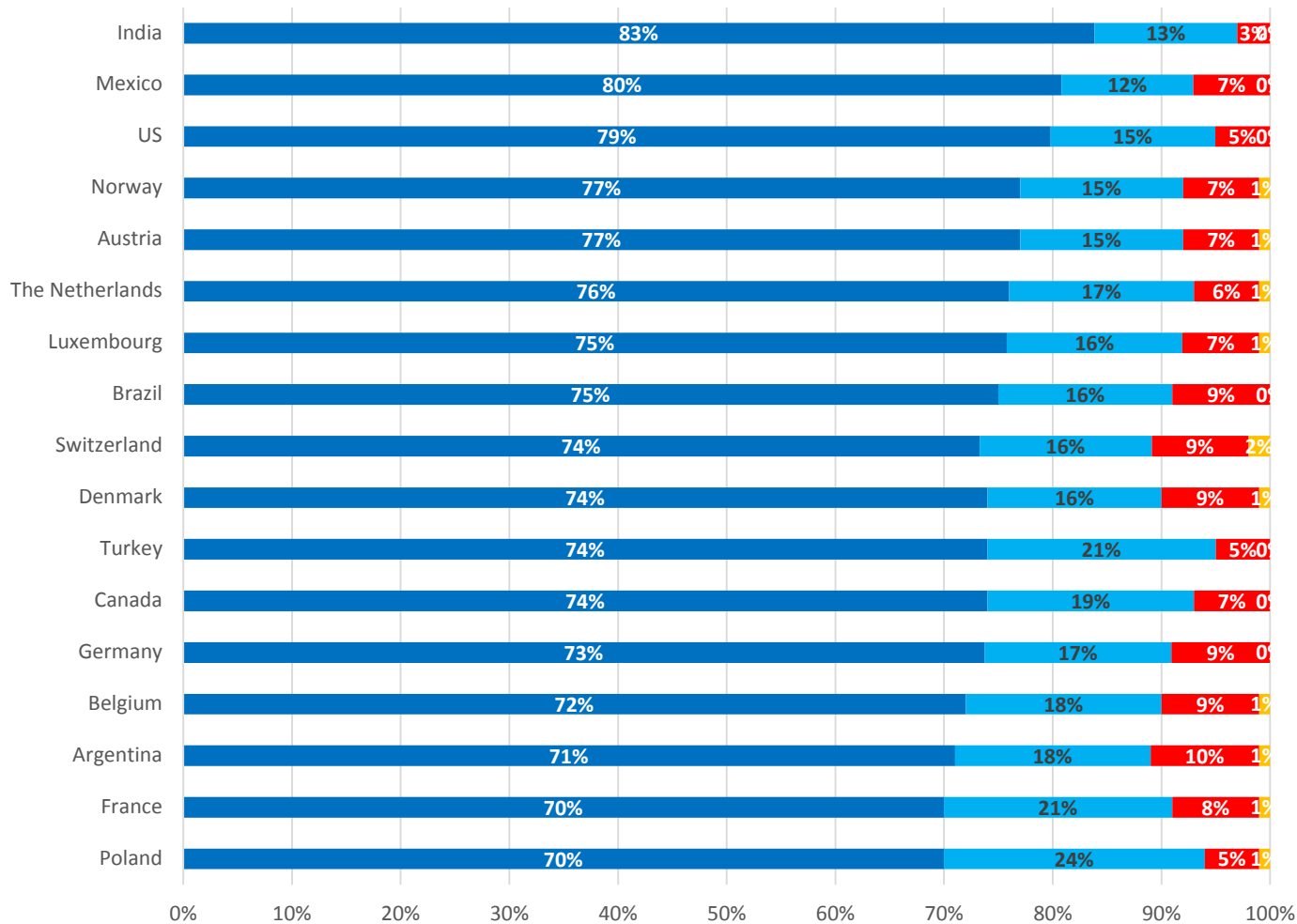


Question:

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

JOB SATISFACTION

Job satisfaction highest in India and Mexico



Job satisfaction (slightly) increased in Turkey, Germany, France, Greece, China and Hungary.

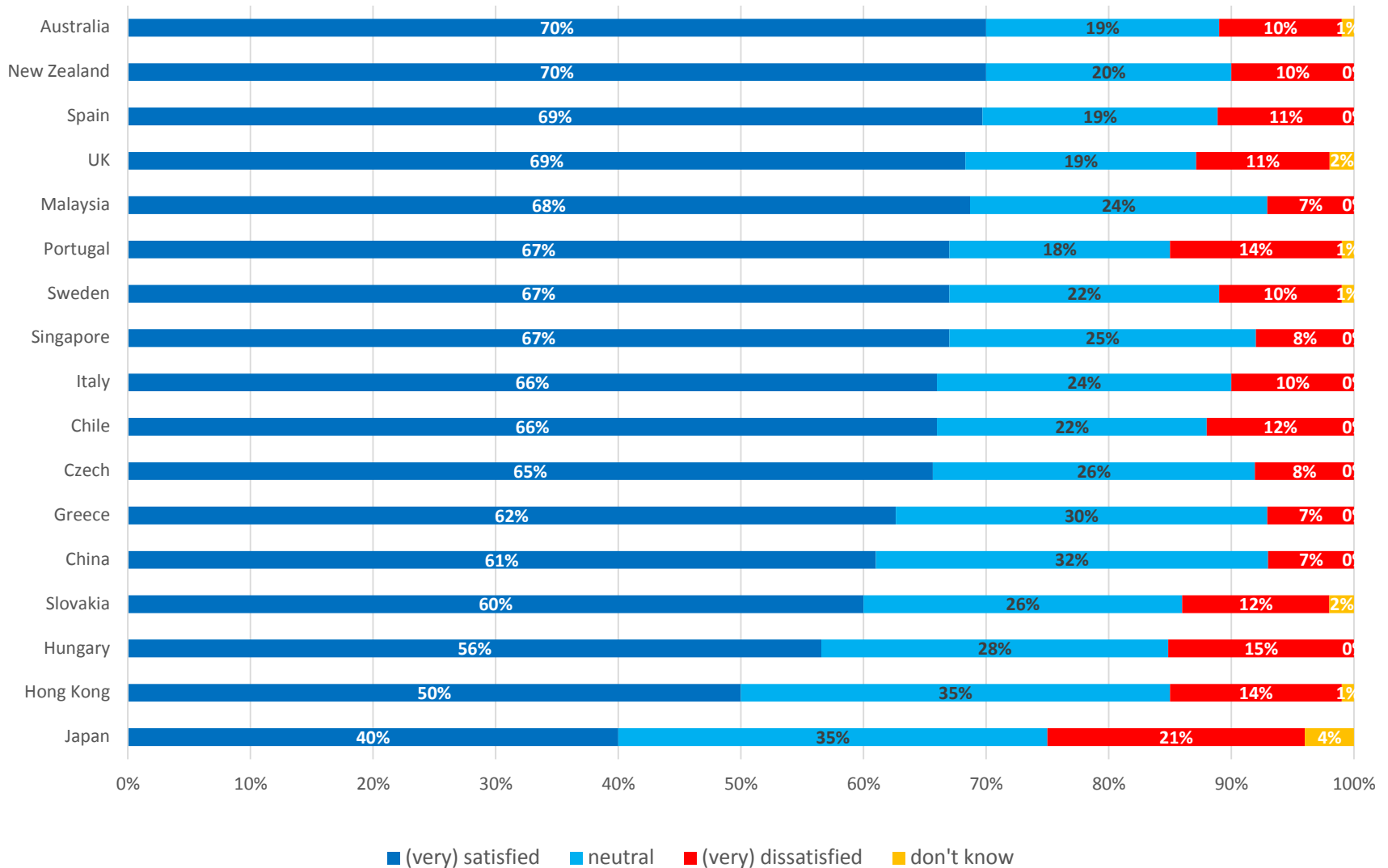
Job satisfaction (slightly) decreased in Mexico, Denmark, Argentina, New Zealand, Spain, UK, Portugal, Chile, Czech Republic, Slovakia and Japan.

Question:

■ (very) satisfied ■ neutral ■ (very) dissatisfied ■ don't know

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

Job satisfaction lowest in Japan



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 second wave of 2015 was conducted between April 17 – May 4, 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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