

global report Randstad Workmonitor Q2, 2016  
**Prospects for older workers shrink while the  
skills gap widens**  
incl. quarterly mobility, job change and job satisfaction

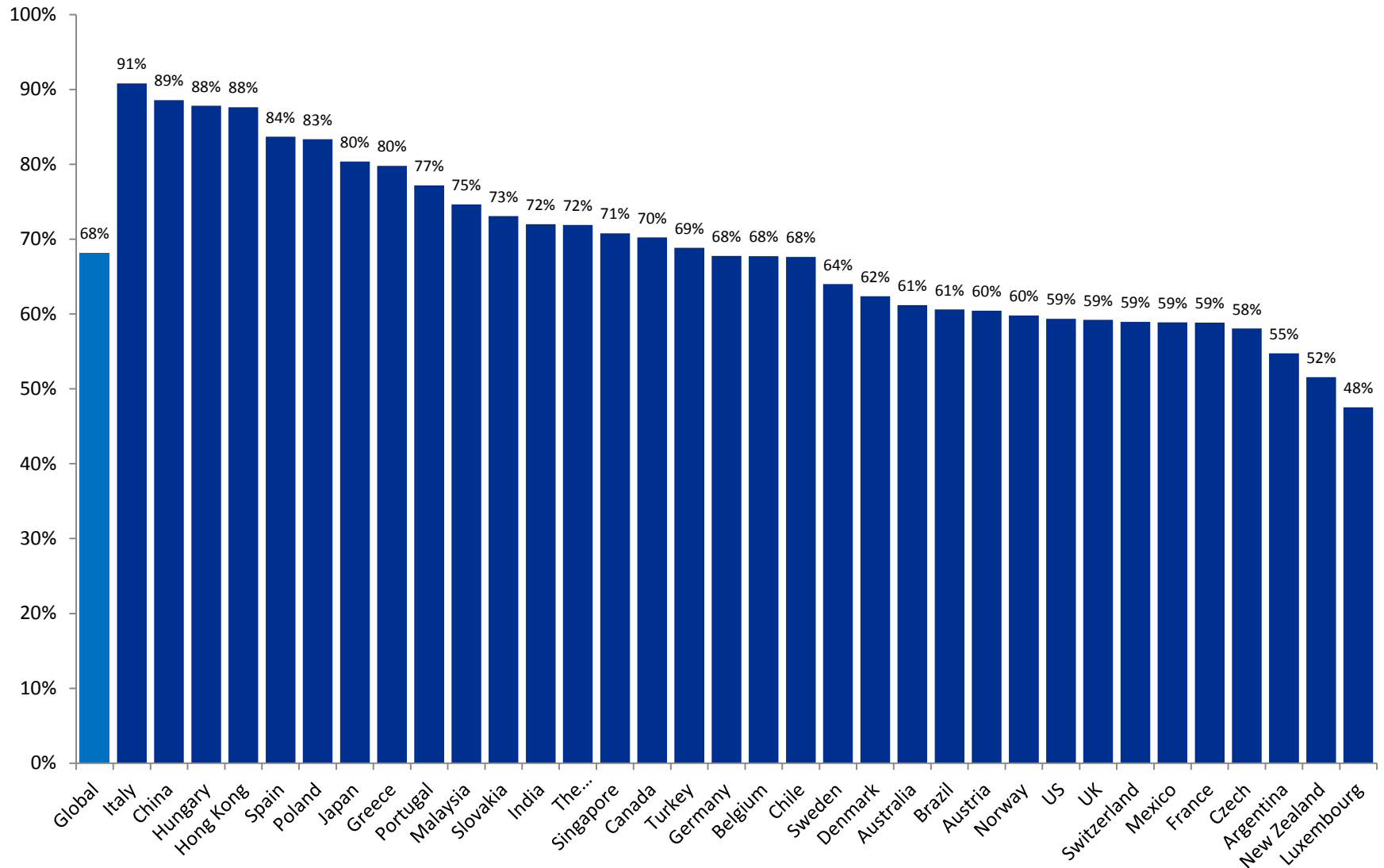
Group Communications  
Randstad Holding nv

June 2016

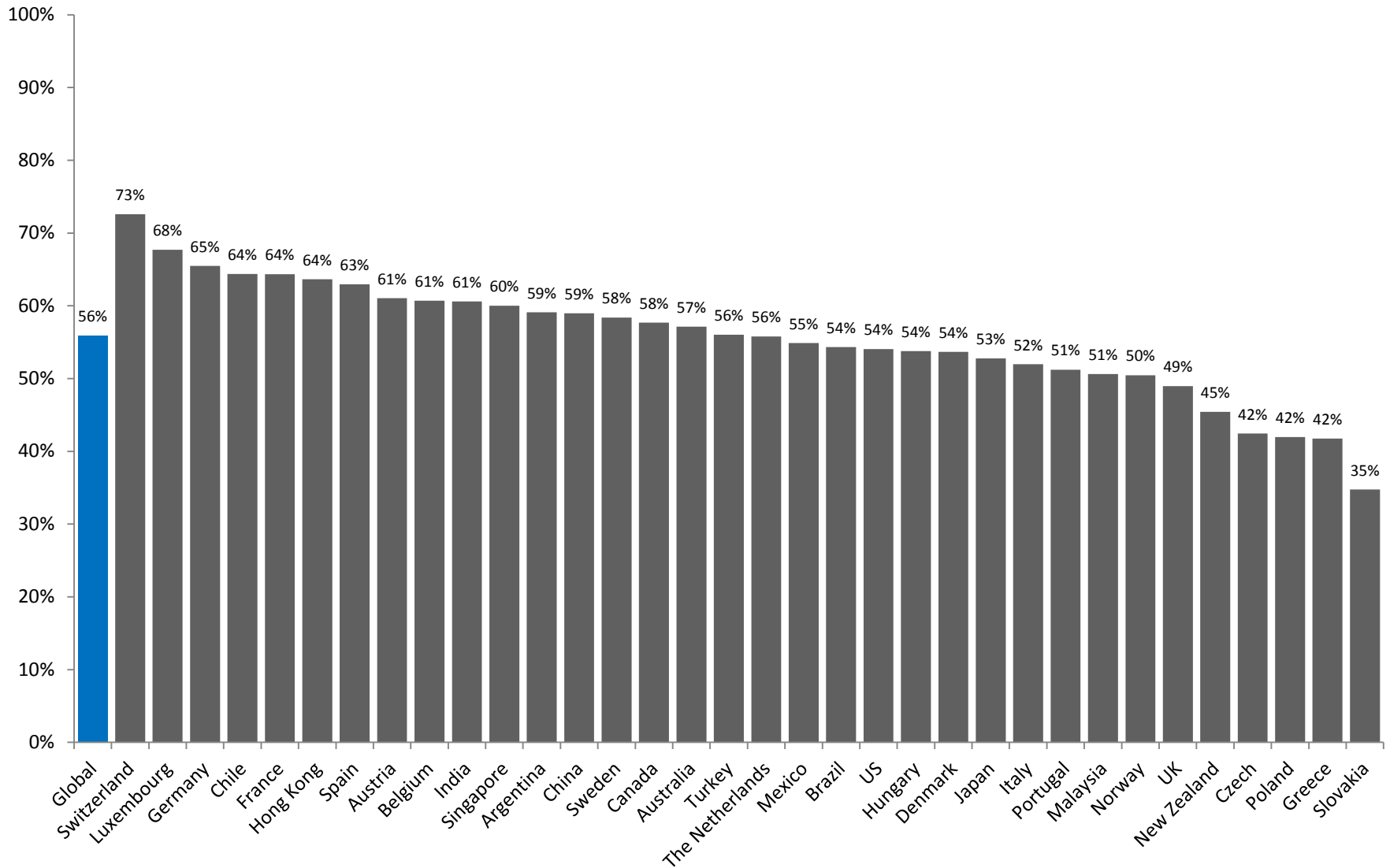


# 1) PROSPECTS FOR OLDER WORKERS SHRINK WHILE THE SKILLS GAP WIDENS

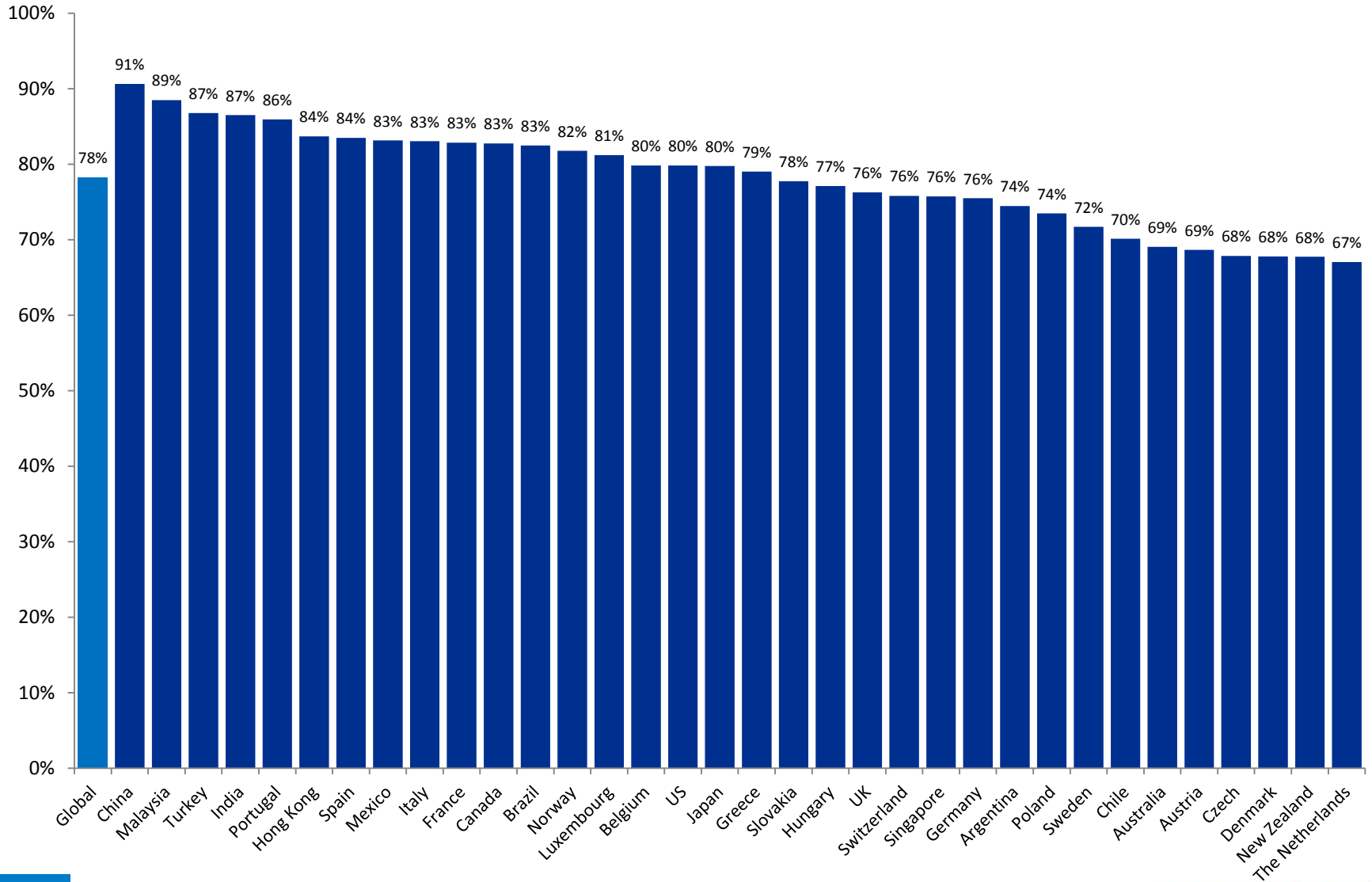
# 68% agree that an aging workforce will cause a decrease in the working population in their country



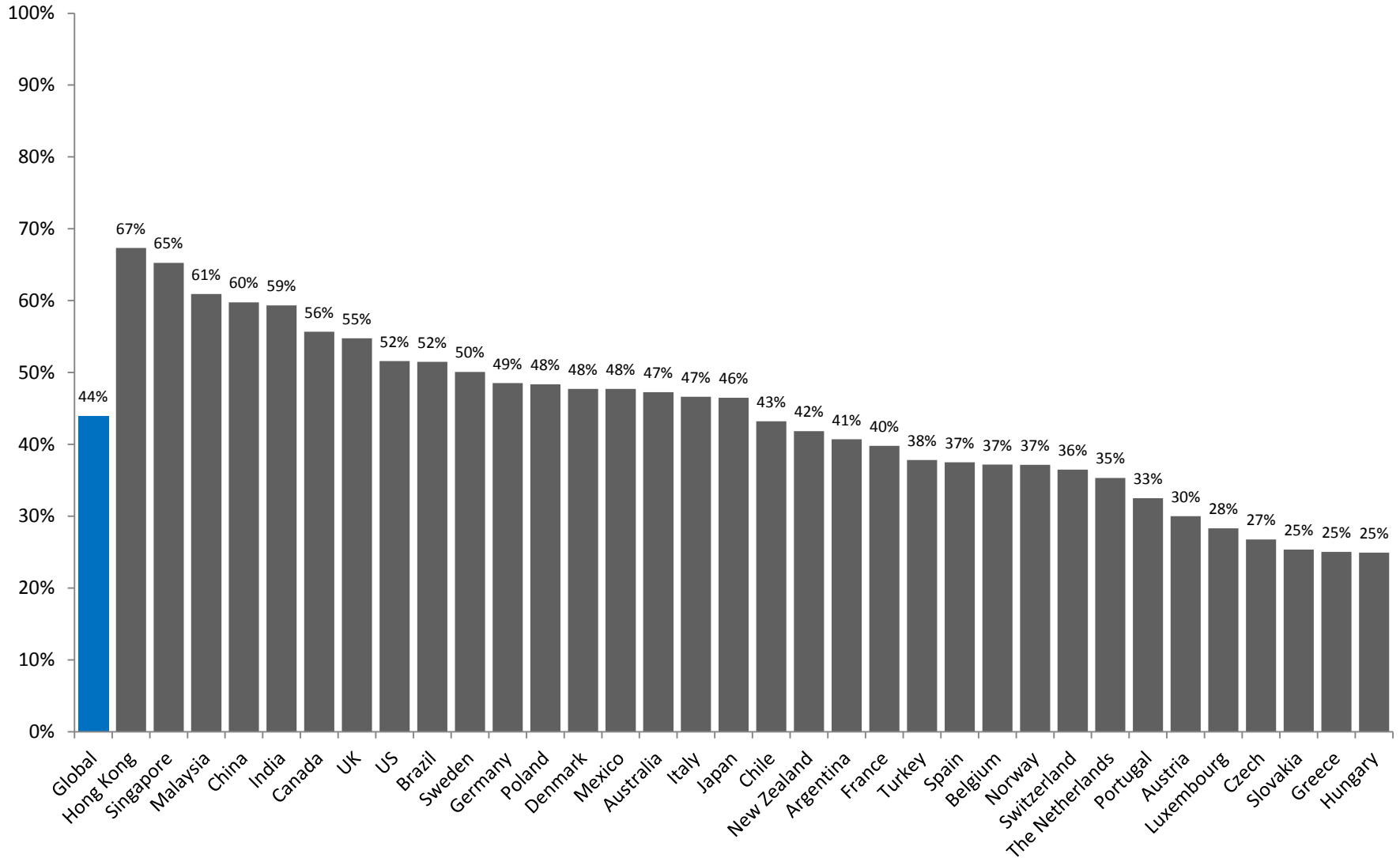
# 56% agree that retaining older workers (over 55) is crucial for their company's success



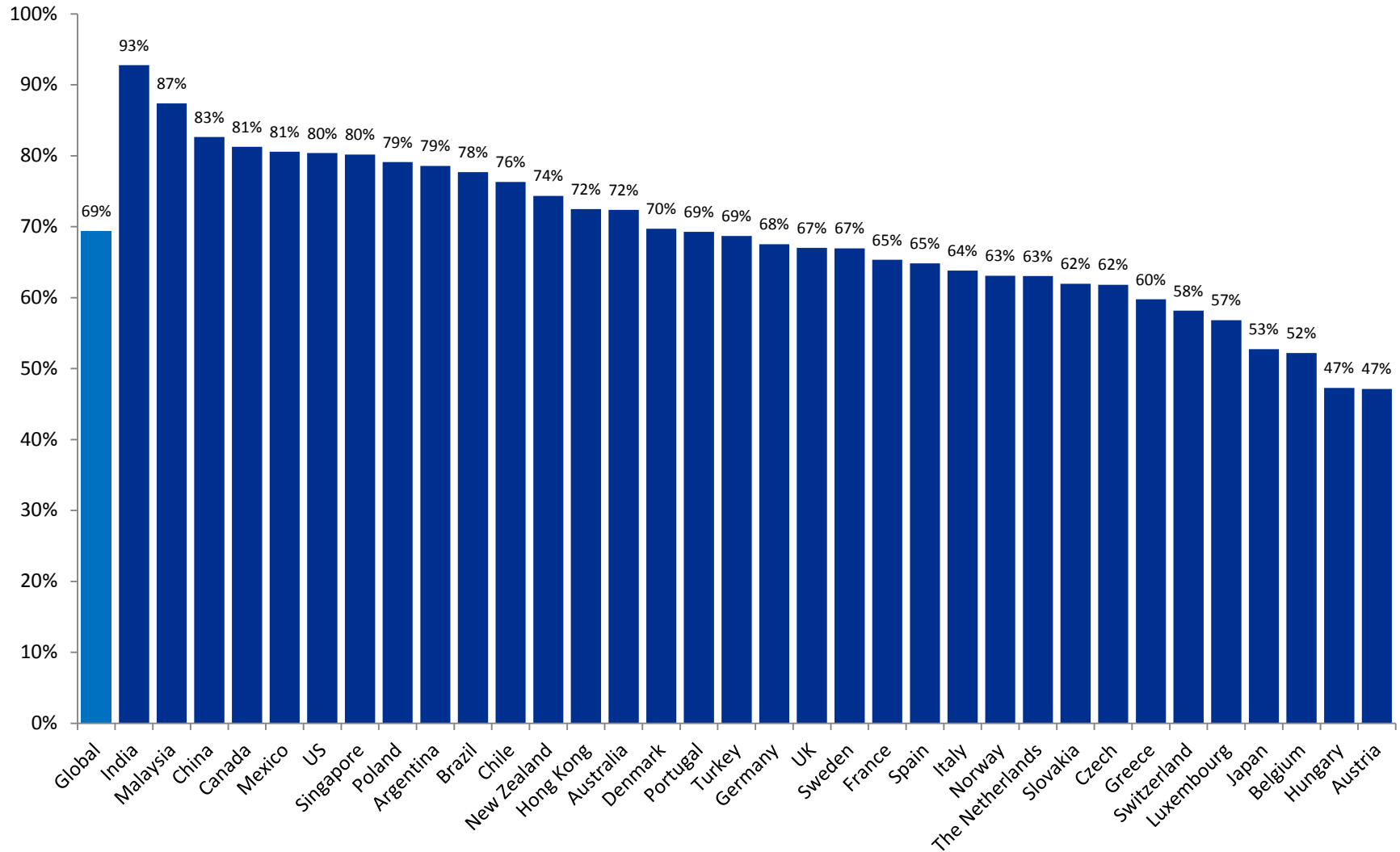
# 78% agree that attracting young people is crucial for their company's success



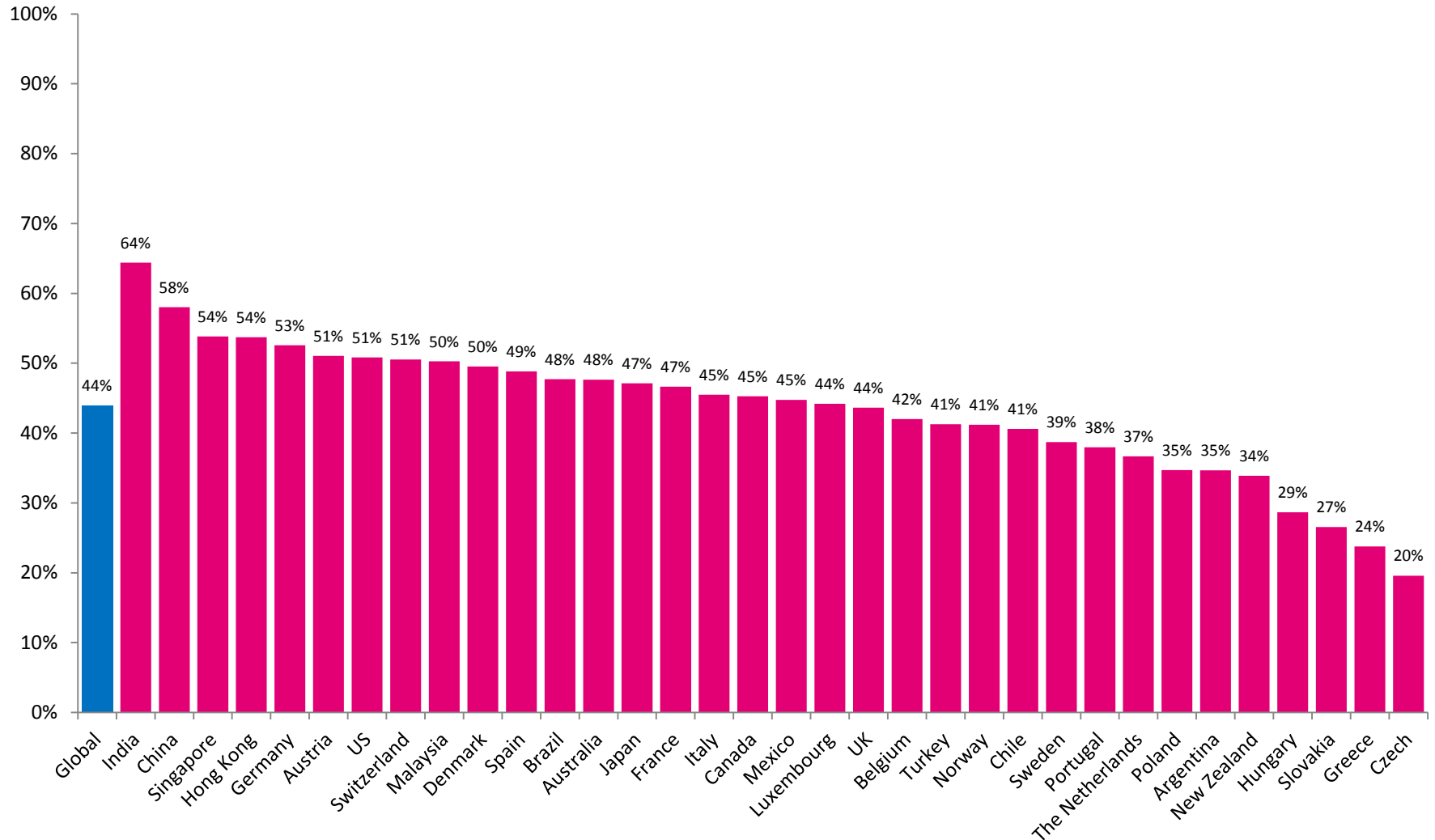
# 44% believe that employment prospects for older workers (over 55) will increase in the next 5 years



# 69% believe that employment prospects for young people (18-30) will increase in the next 5 years

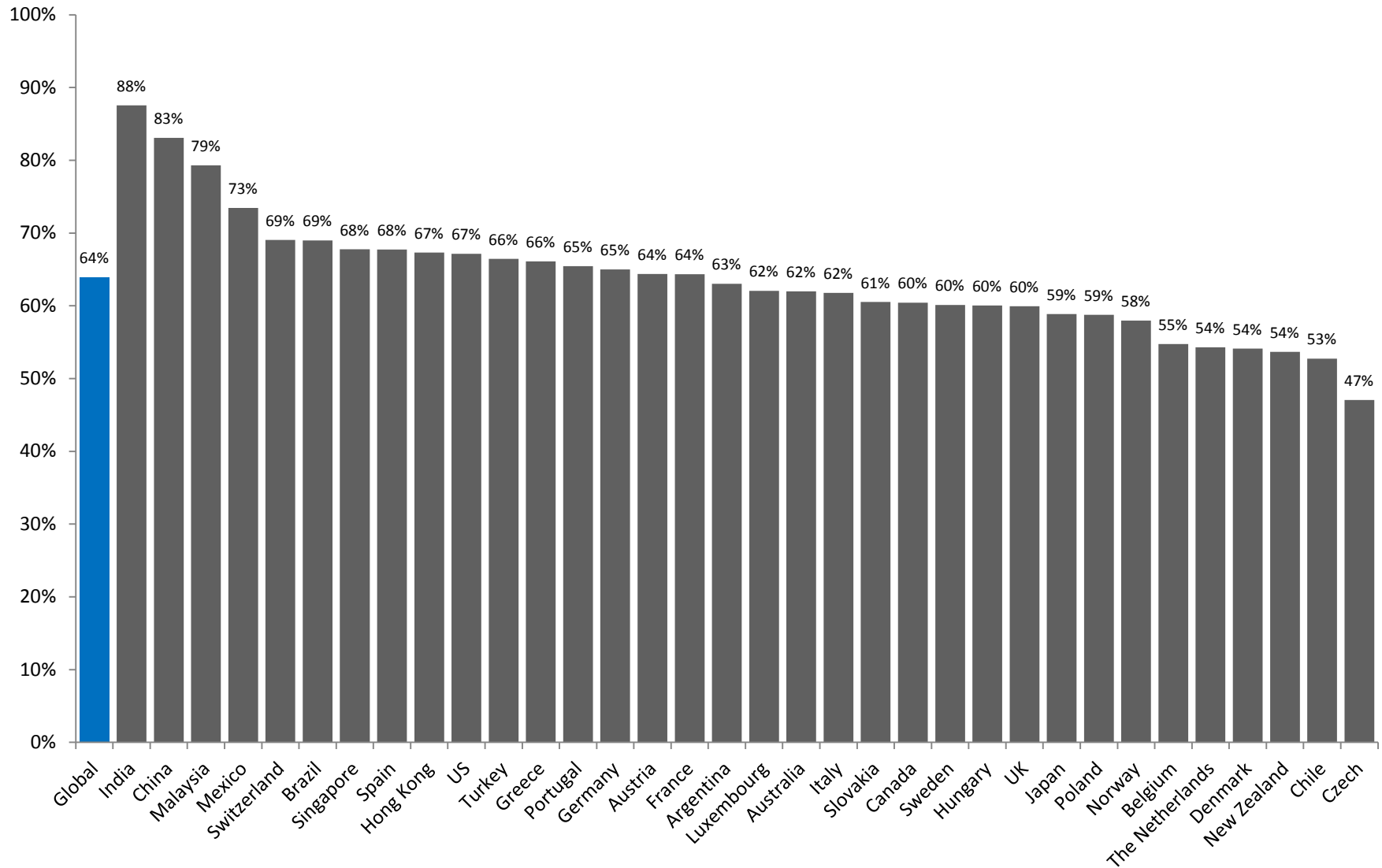


# 44% state that their employer has active policies in place to attract and retain people aged 55 and above

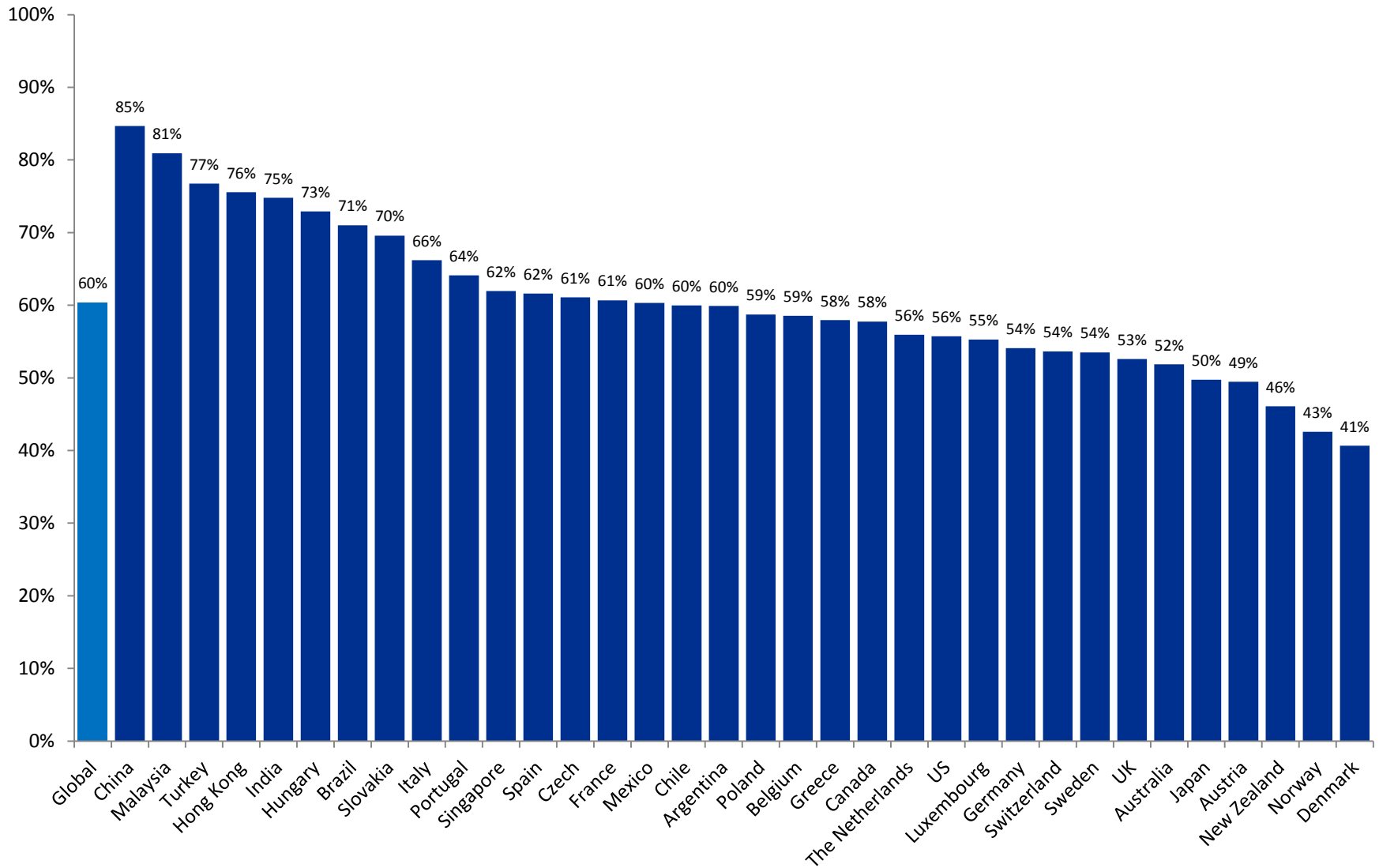




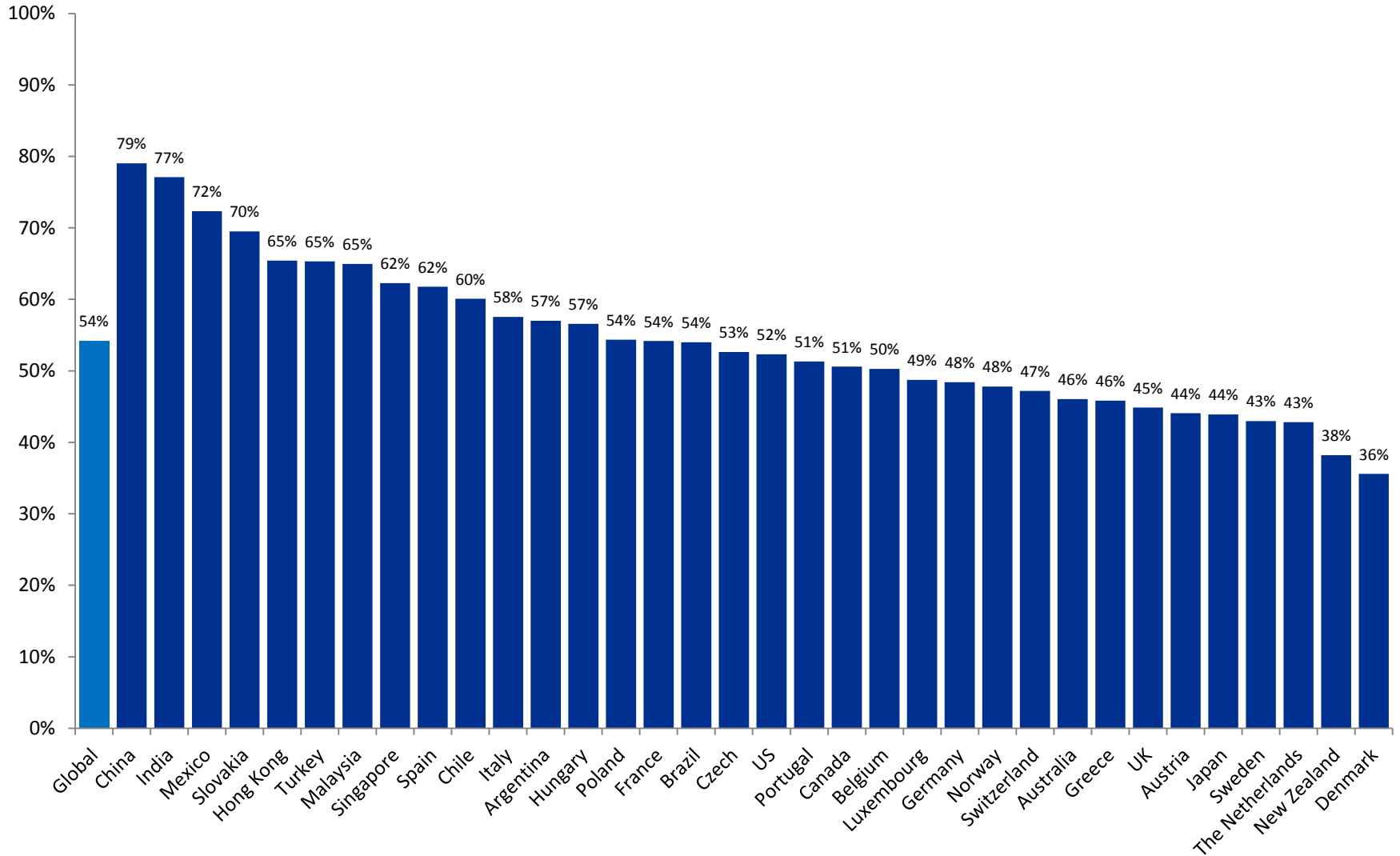
# 64% state that their employer has active policies in place to attract younger workers (18-30)



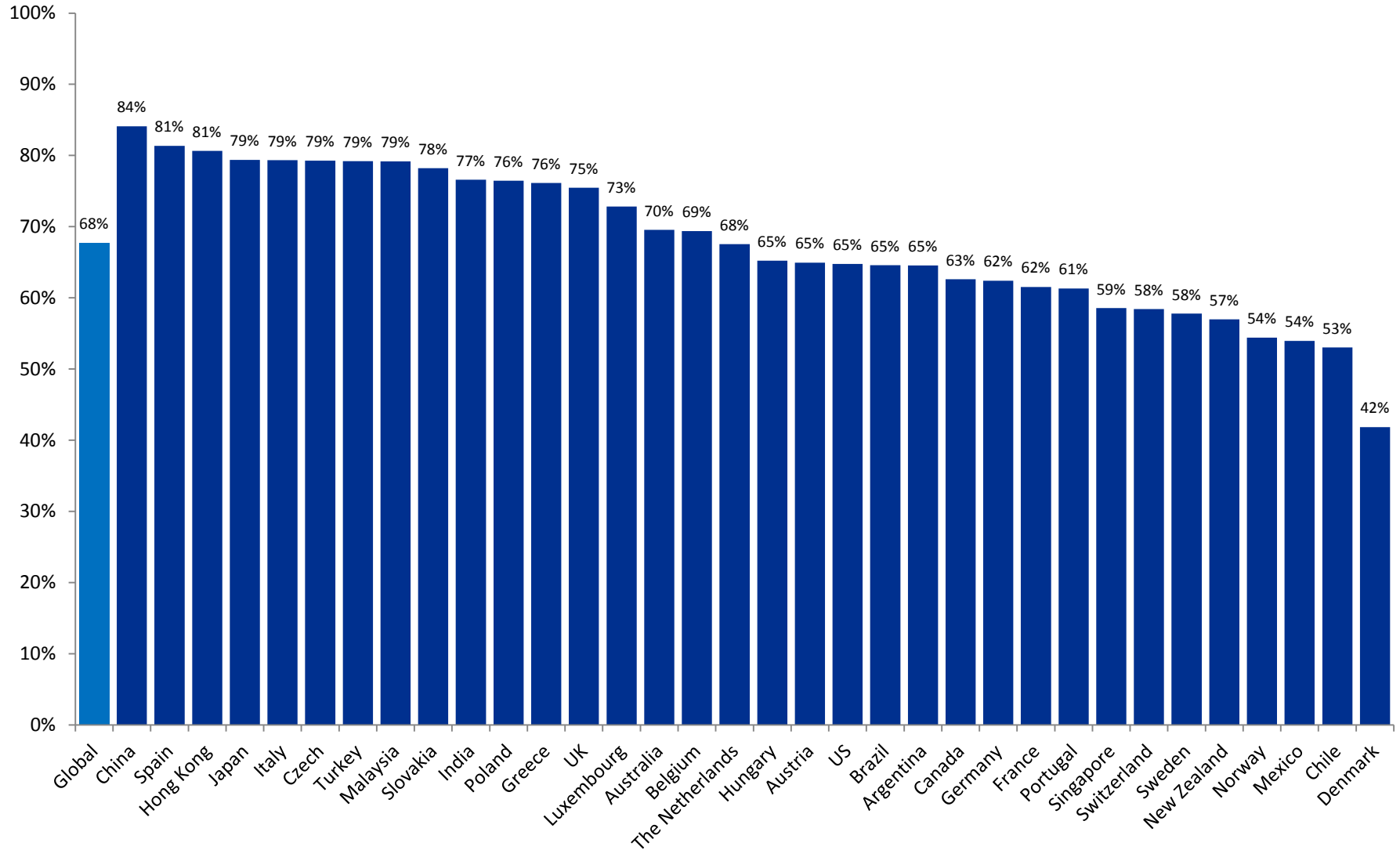
# 60% point out that the skills gap is a real problem for their employer



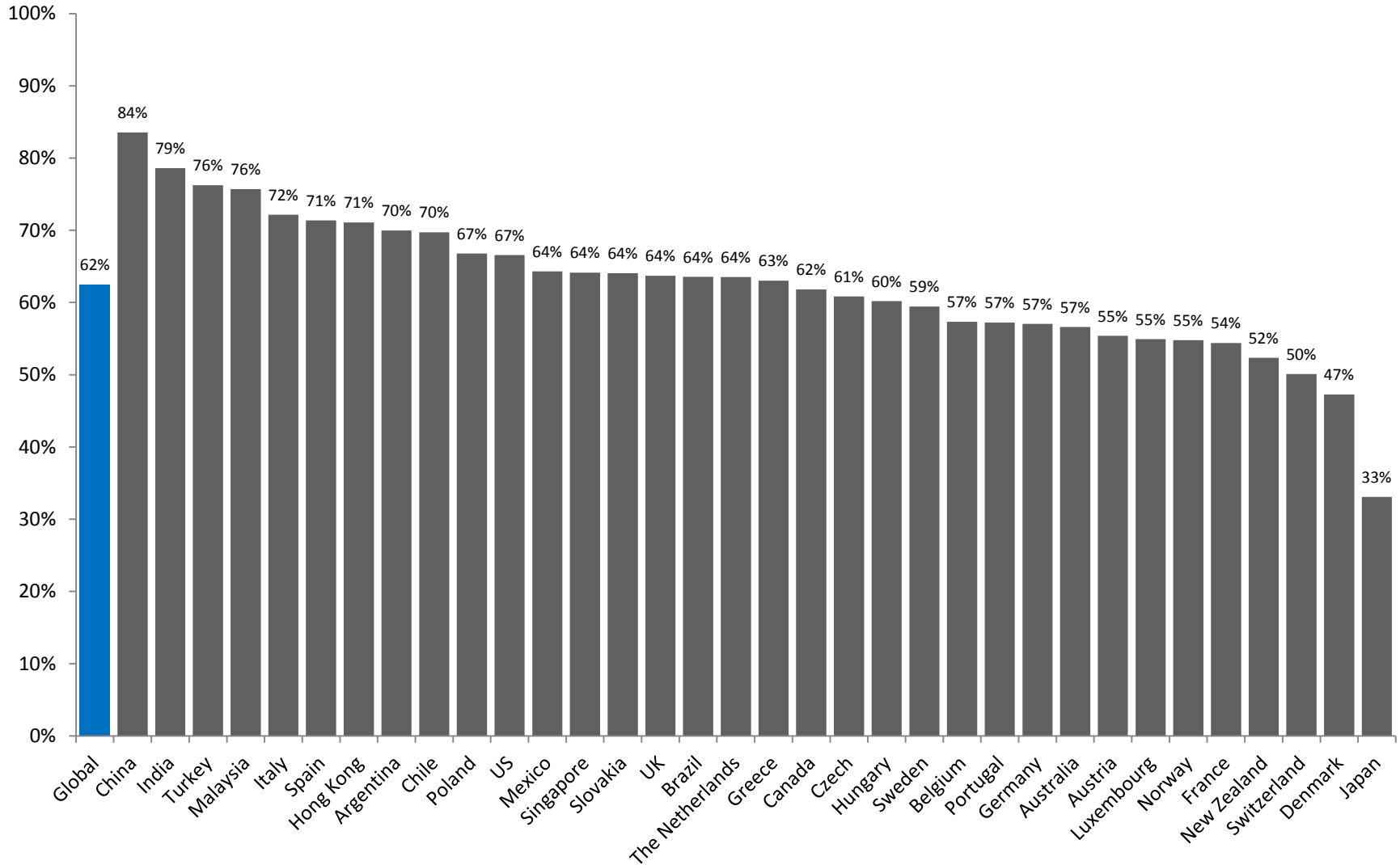
# 54% see that closing the skills gap is the number one priority for their employer



# 68% believe that it is harder for older workers (above 55) to acquire new skills

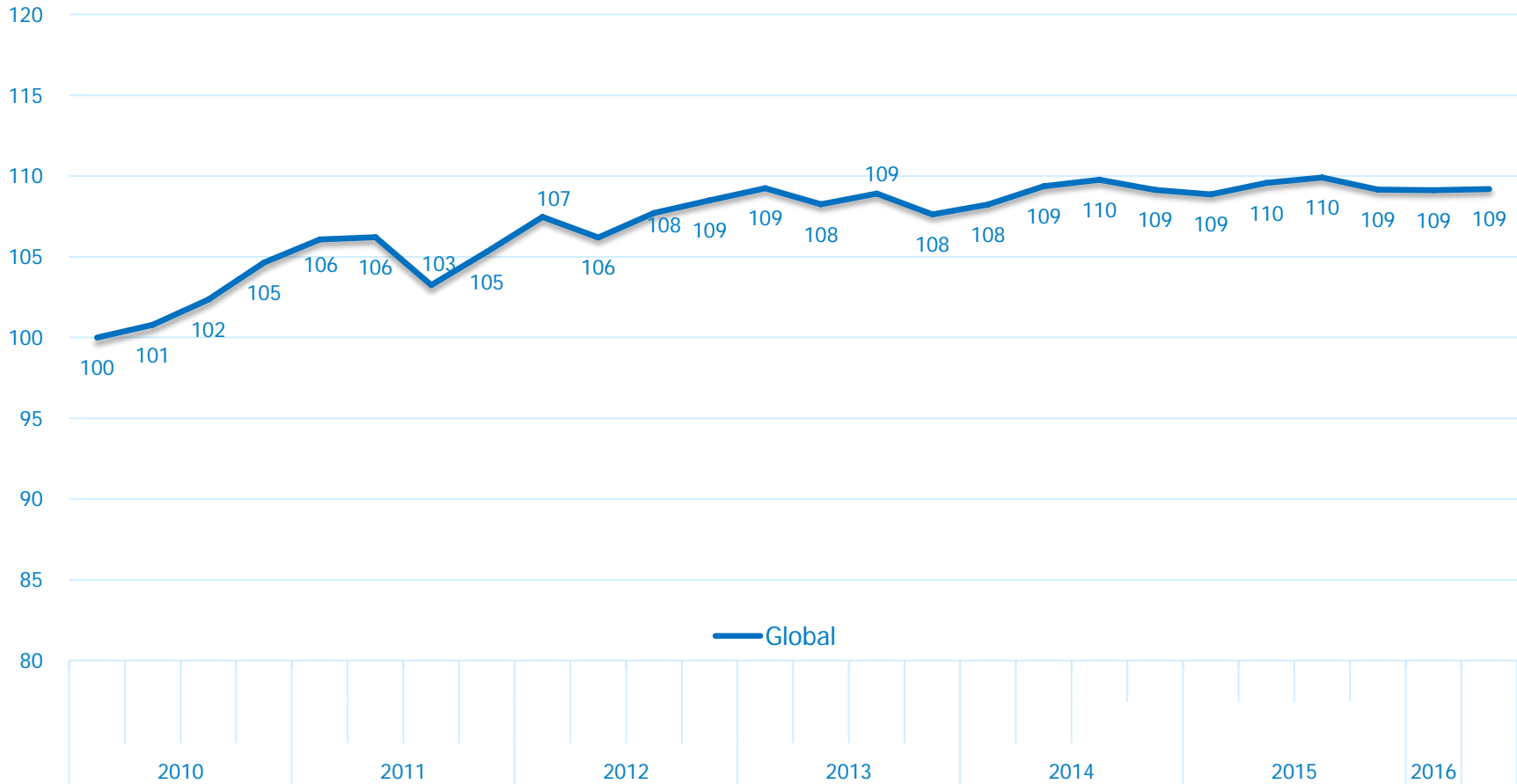


# 62% agree that the main skills gap lies in STEM (Science, Technology, Engineering, Mathematics)



# MOBILITY INDEX

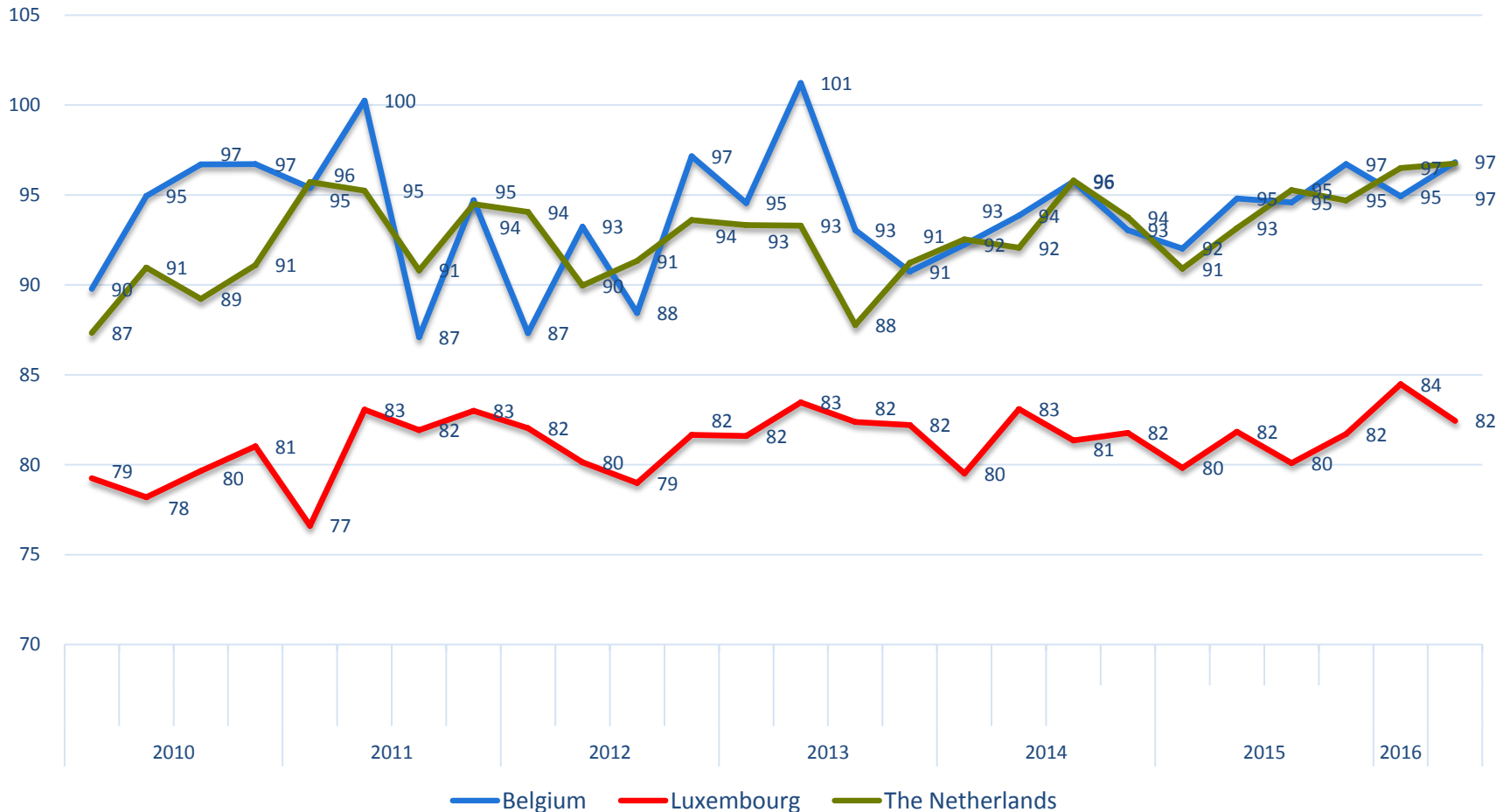
# the global Mobility Index did not change in the last three quarters



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 Luxembourg -2; Belgium +2; flat in the Netherlands

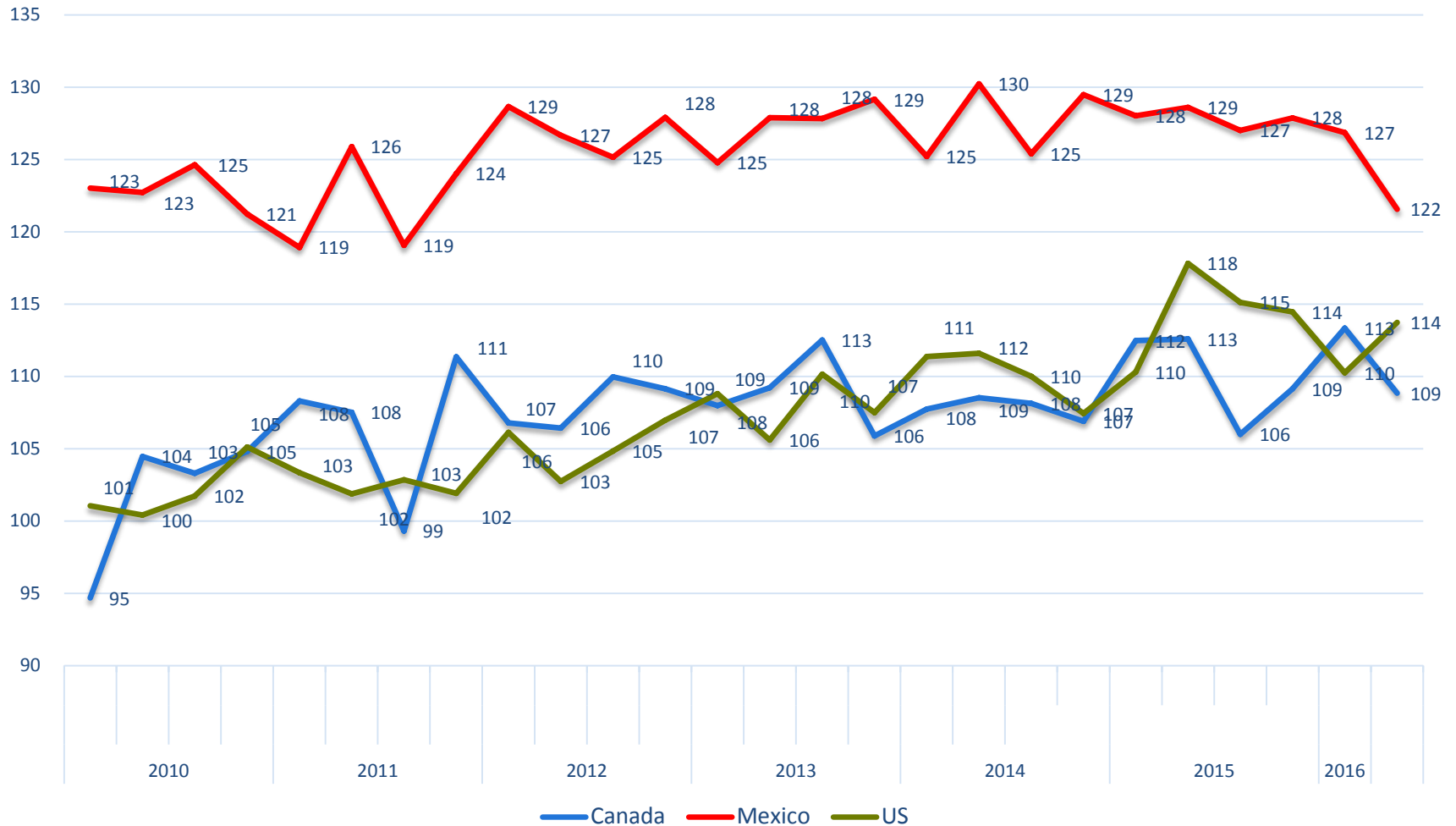


Question:

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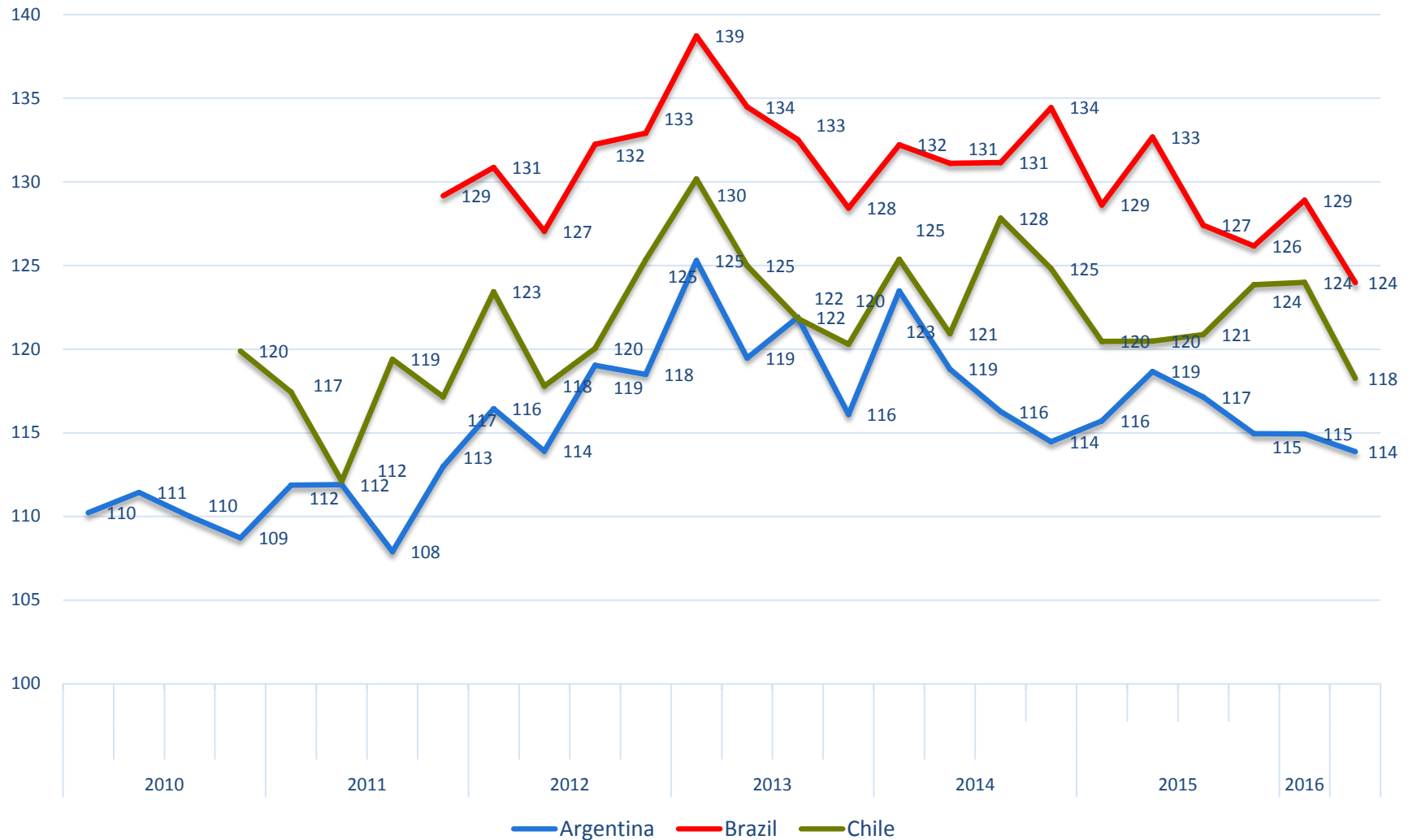
# mobility Mexico -5 and Canada -4; US +4



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?

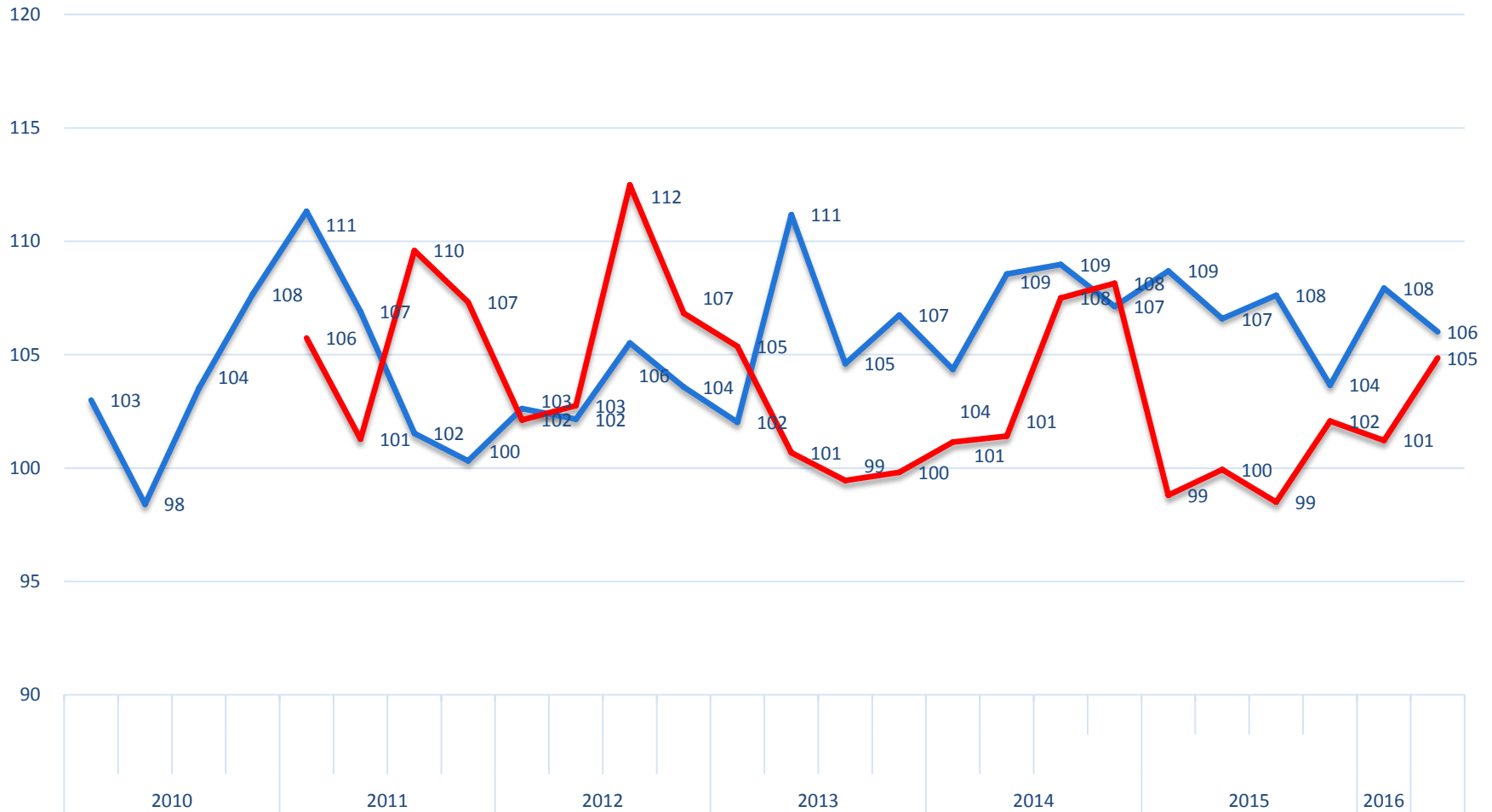
# mobility Chile -6; Brazil -5; Argentina -1



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 New Zealand +4; Australia -2

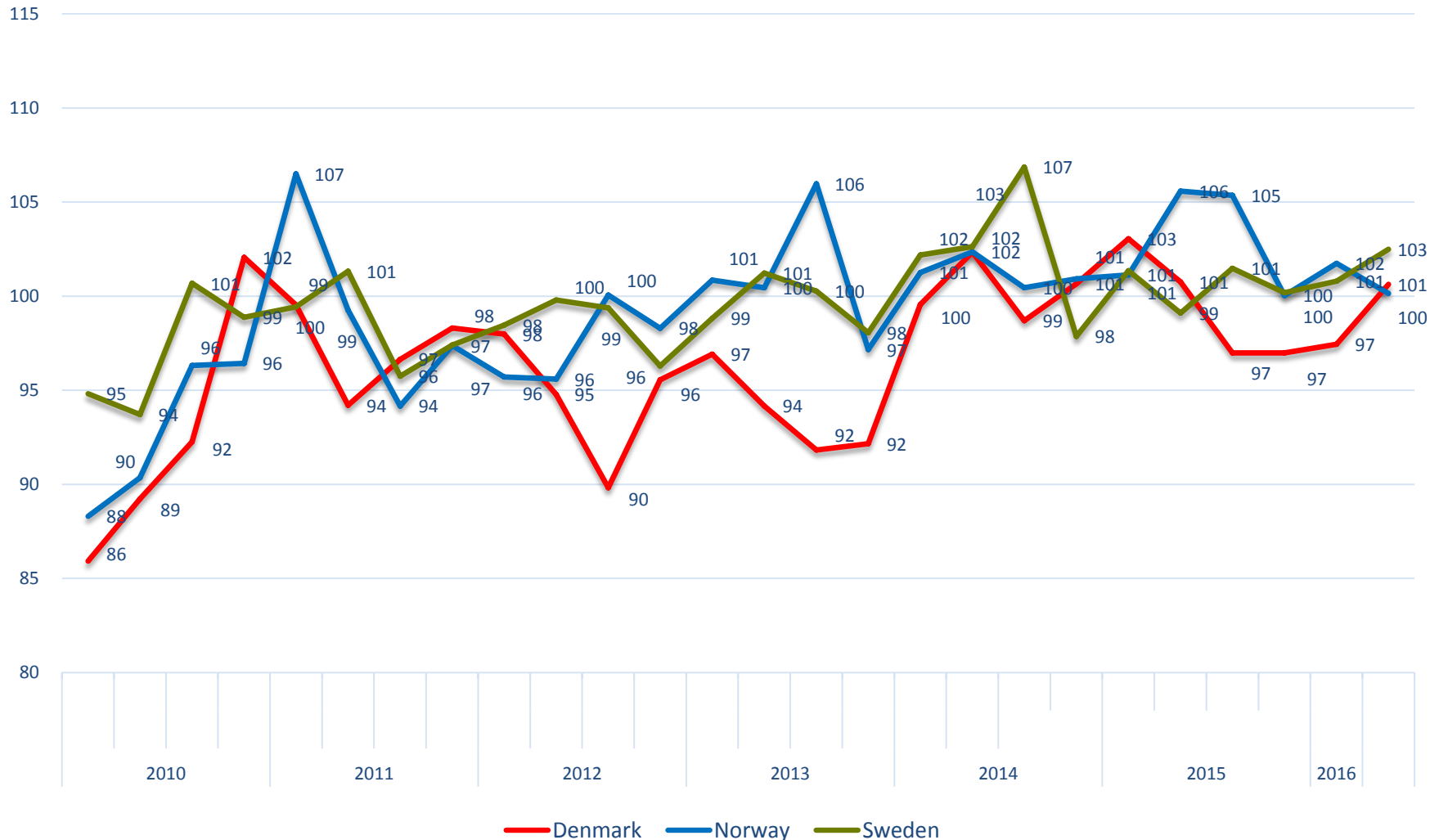


Question:

— Australia — New Zealand

- 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?

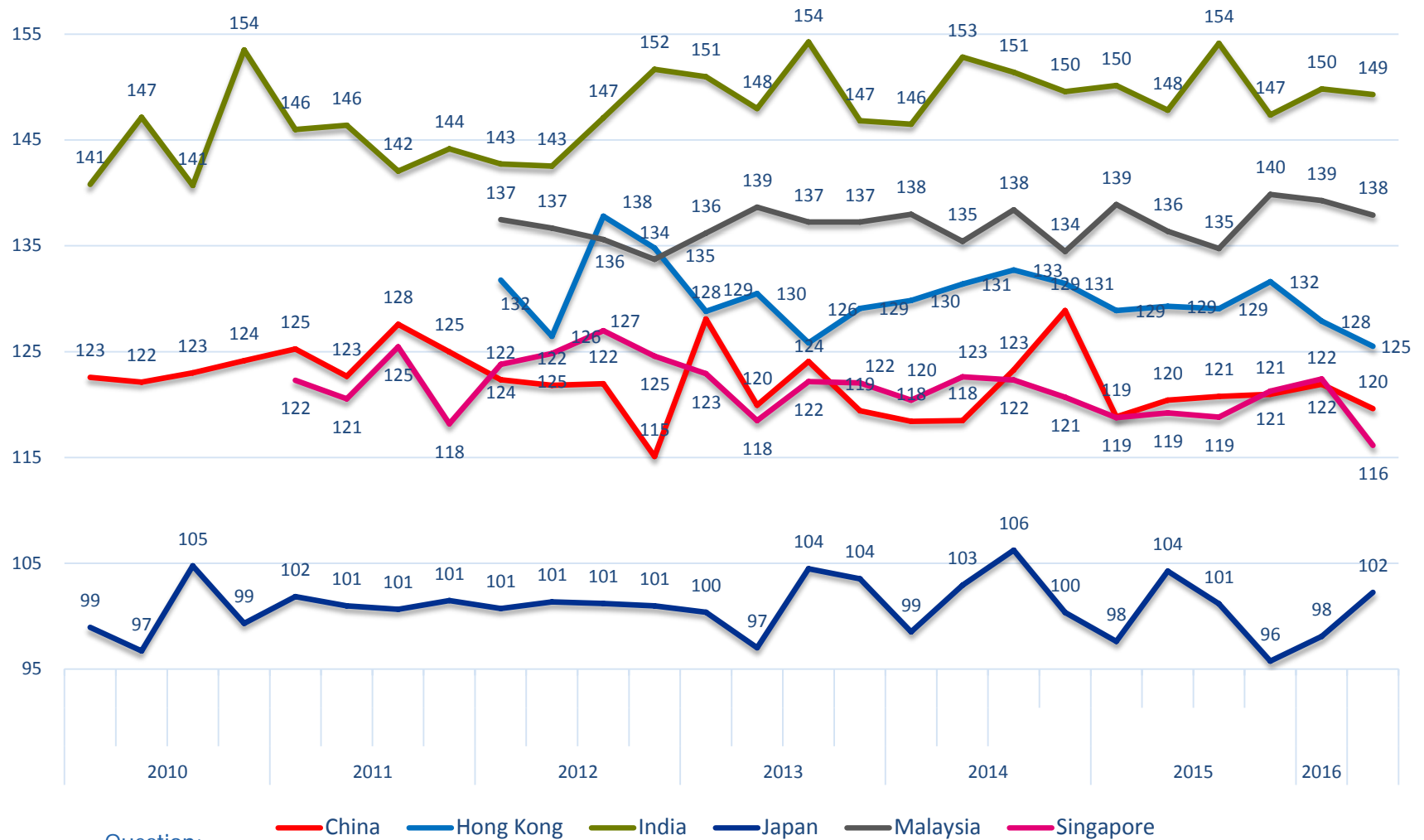
# mobility Denmark +4 and Sweden +2; Norway -2



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?

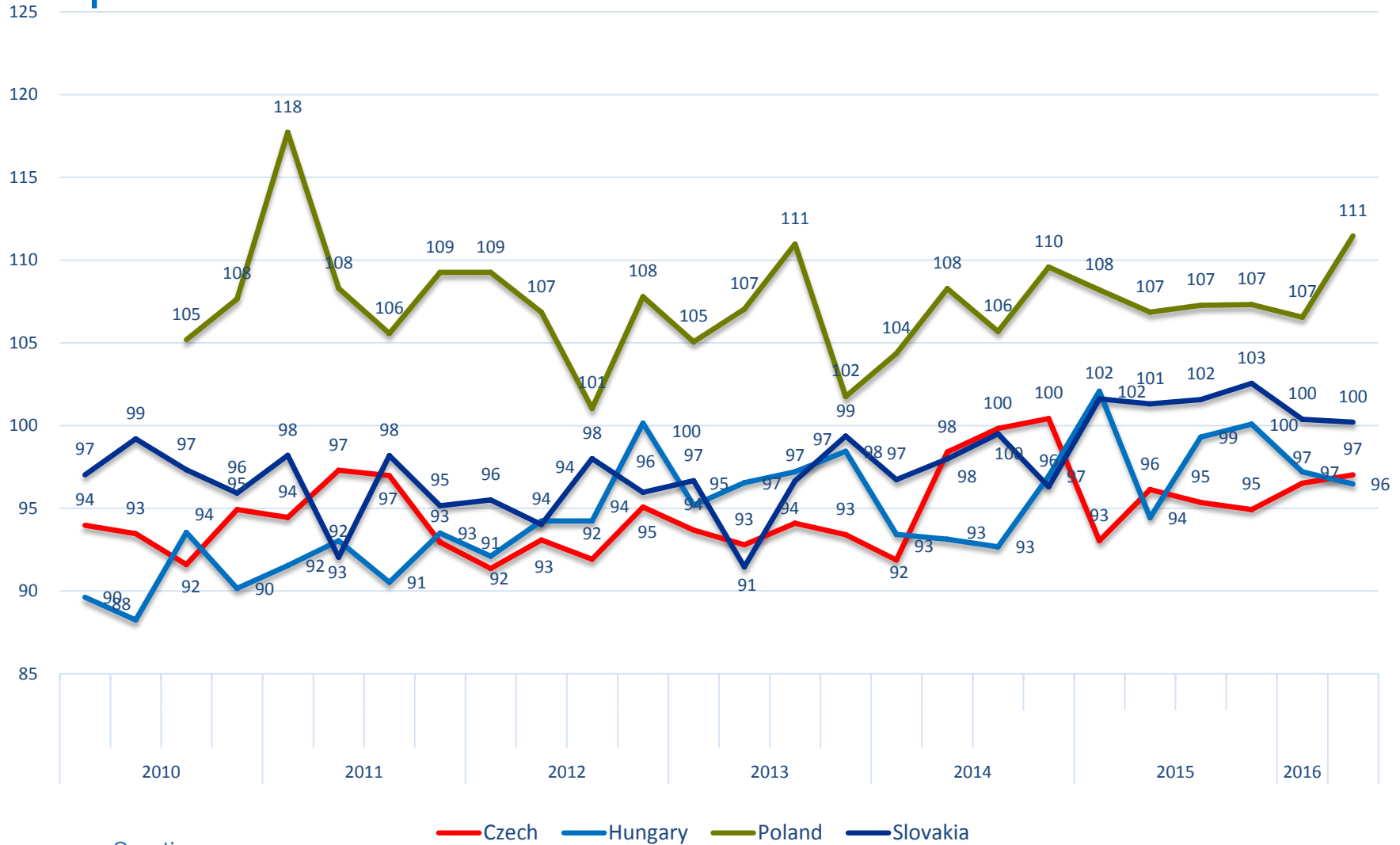
# mobility Japan +4; Singapore -6; Hong Kong -3; China -2; India & Malaysia -1



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?

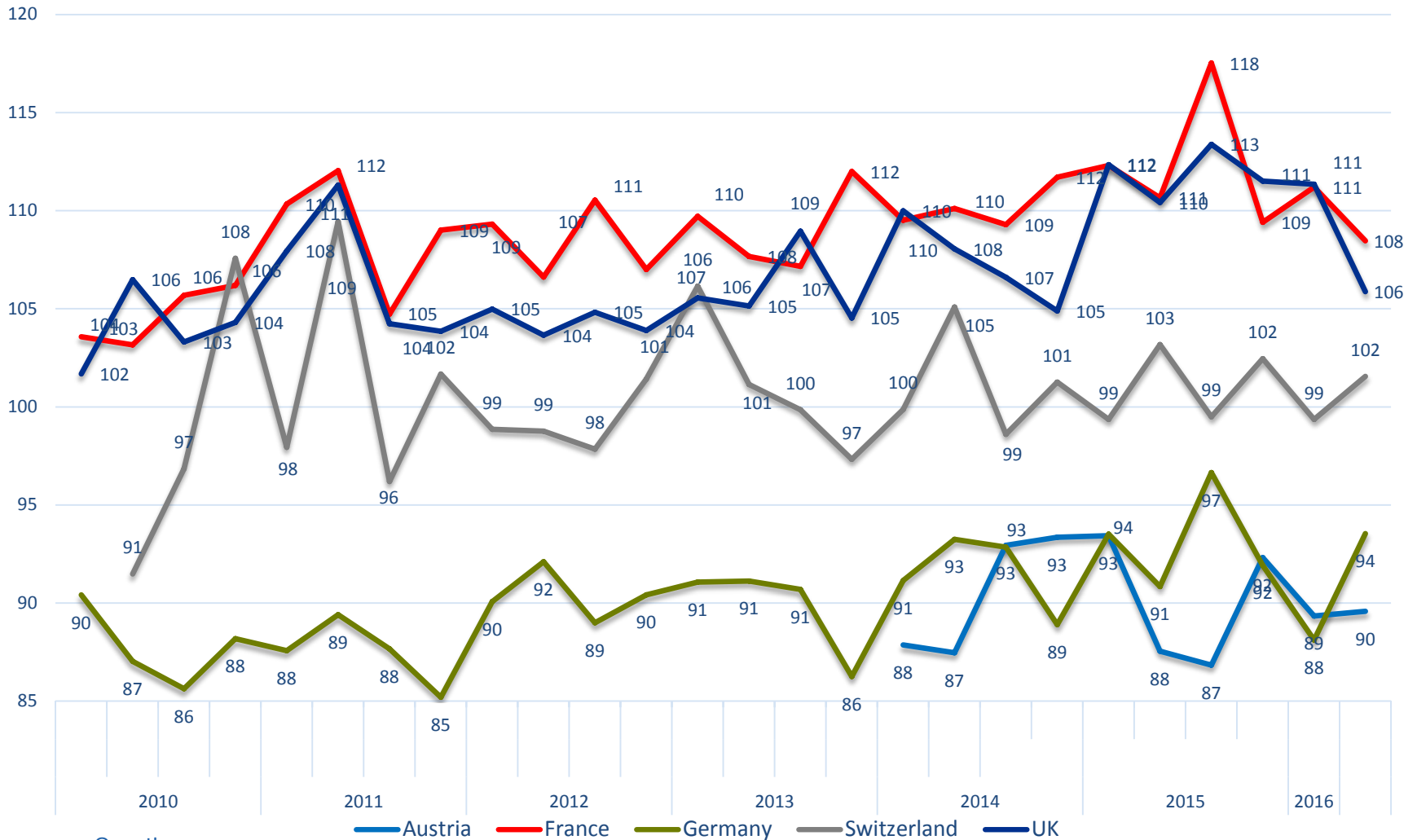
# mobility Poland +4; Hungary -1; Slovakia & Czech Republic flat



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?

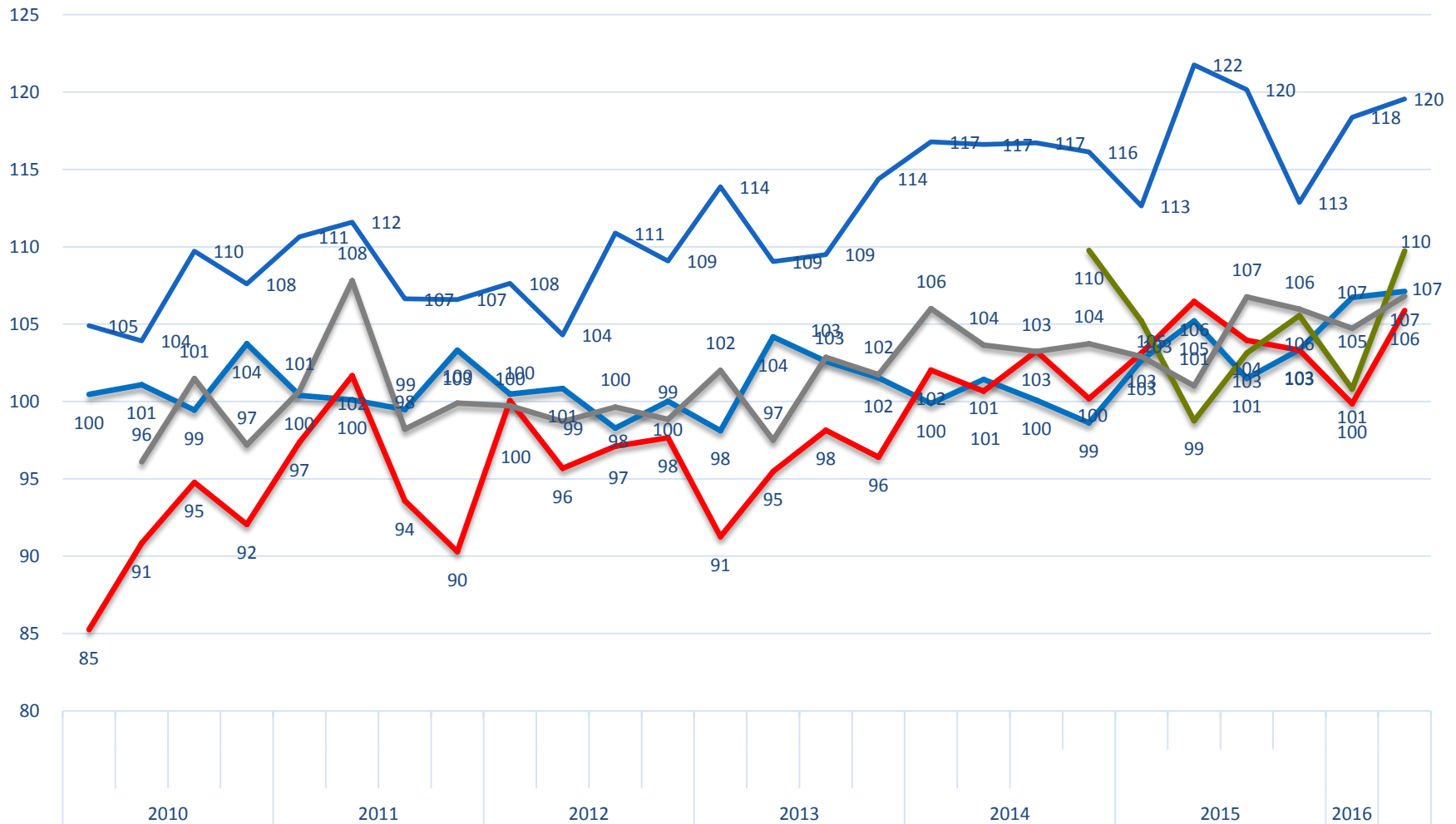
# mobility Germany +5; Switzerland +3 and Austria +1; France -3; UK -5



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 Portugal +9; Italy +6; Turkey +2; Spain -1; Greece flat



Question:

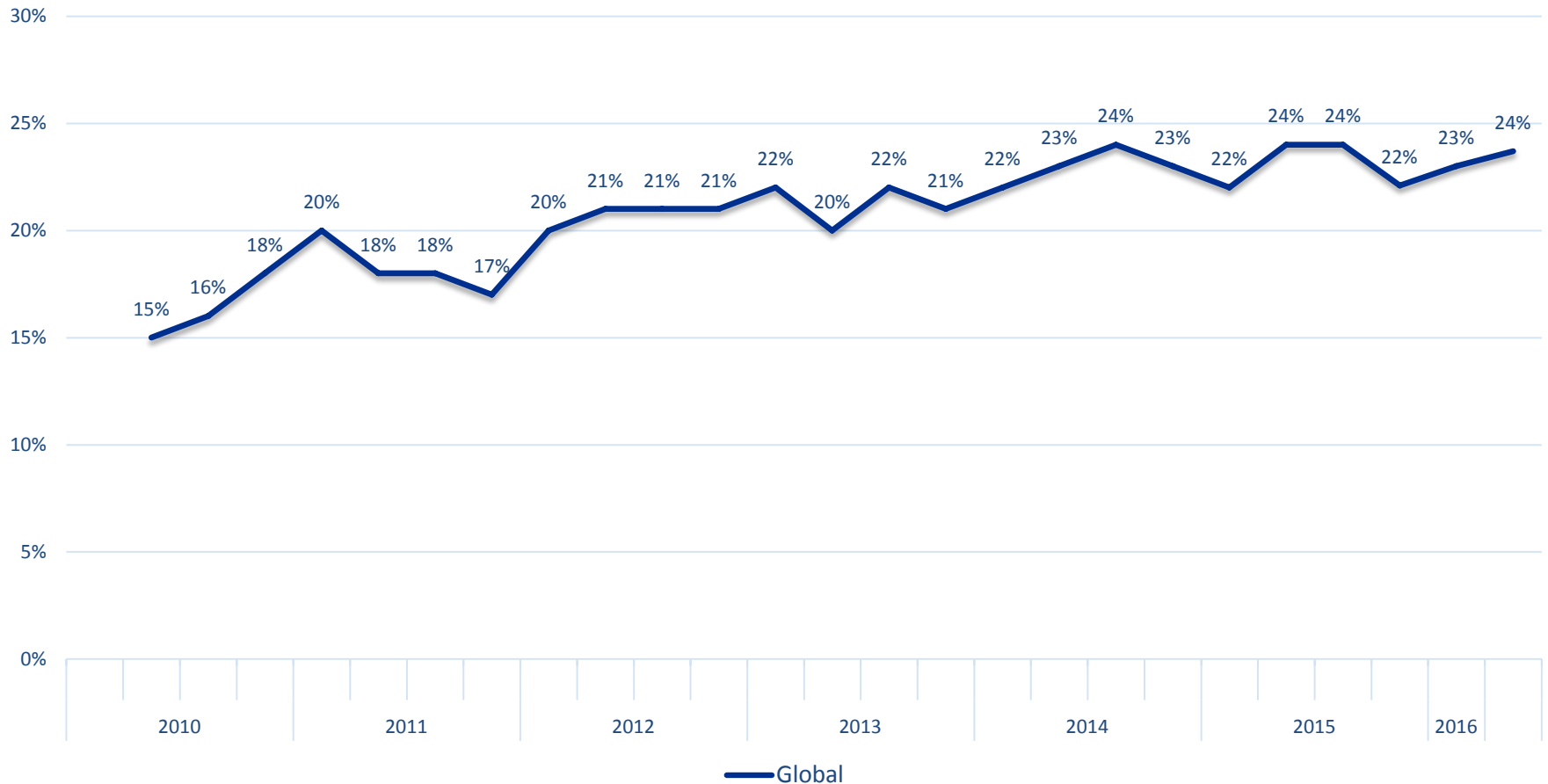
- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
- Do you think you will be doing *different work for a different employer* within the next 6 months?

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# ACTUAL JOB CHANGE

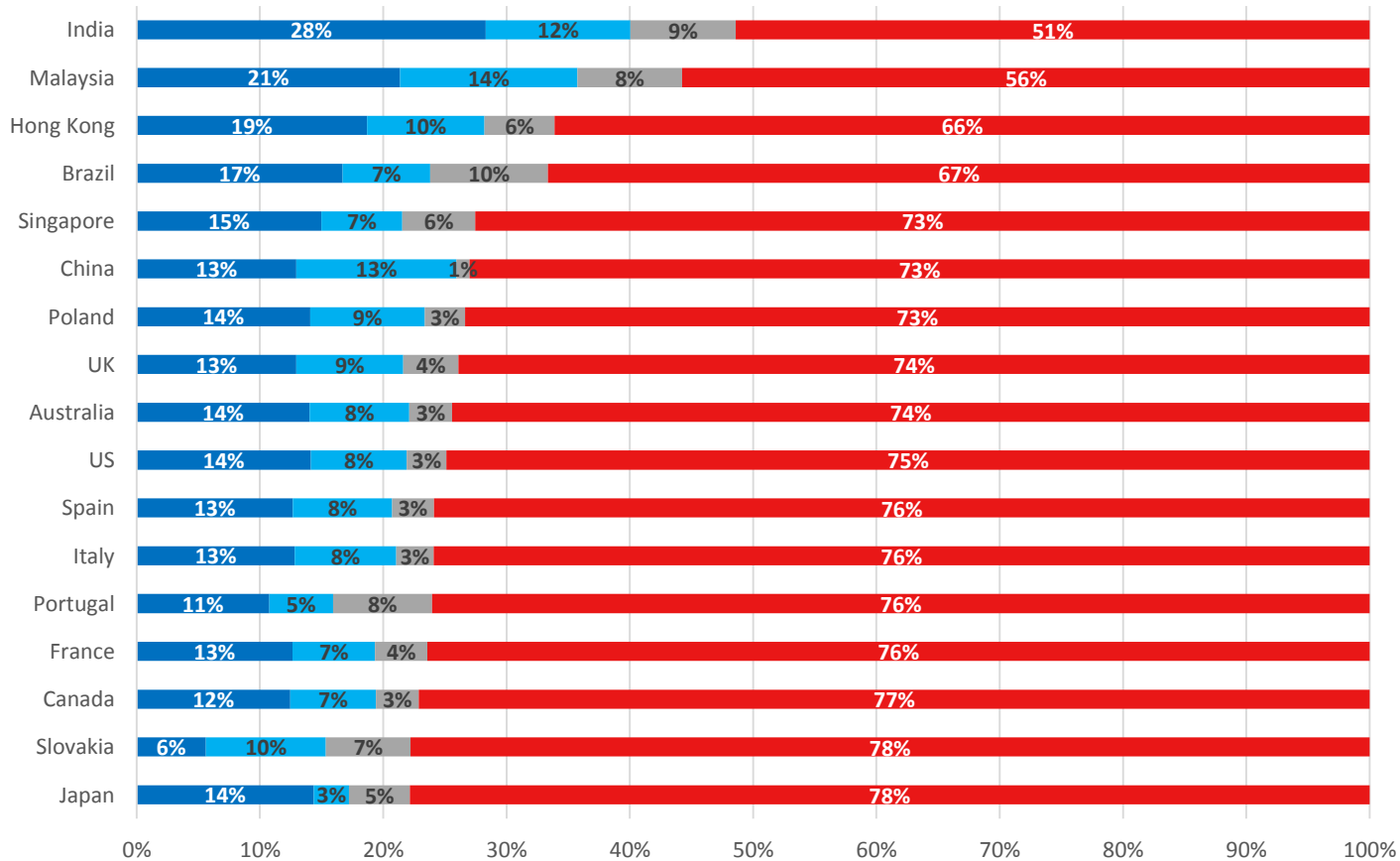
# actual job change slightly increased compared to last quarter (+1%)



## 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 China and India.

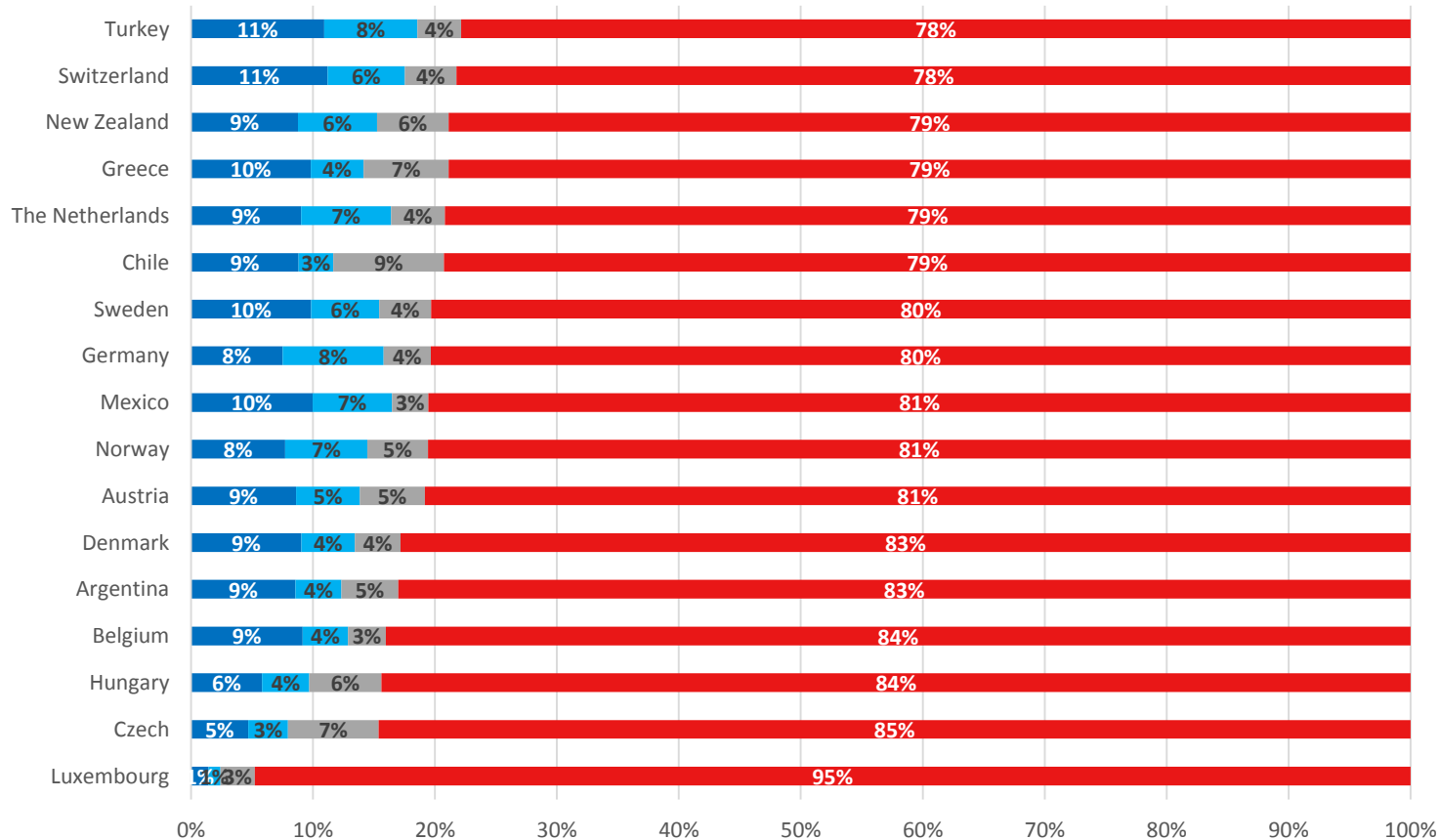
In Brazil, Hong Kong, Japan, New Zealand, Norway, Slovakia and Switzerland the job change decreased compared to last quarter.

- 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

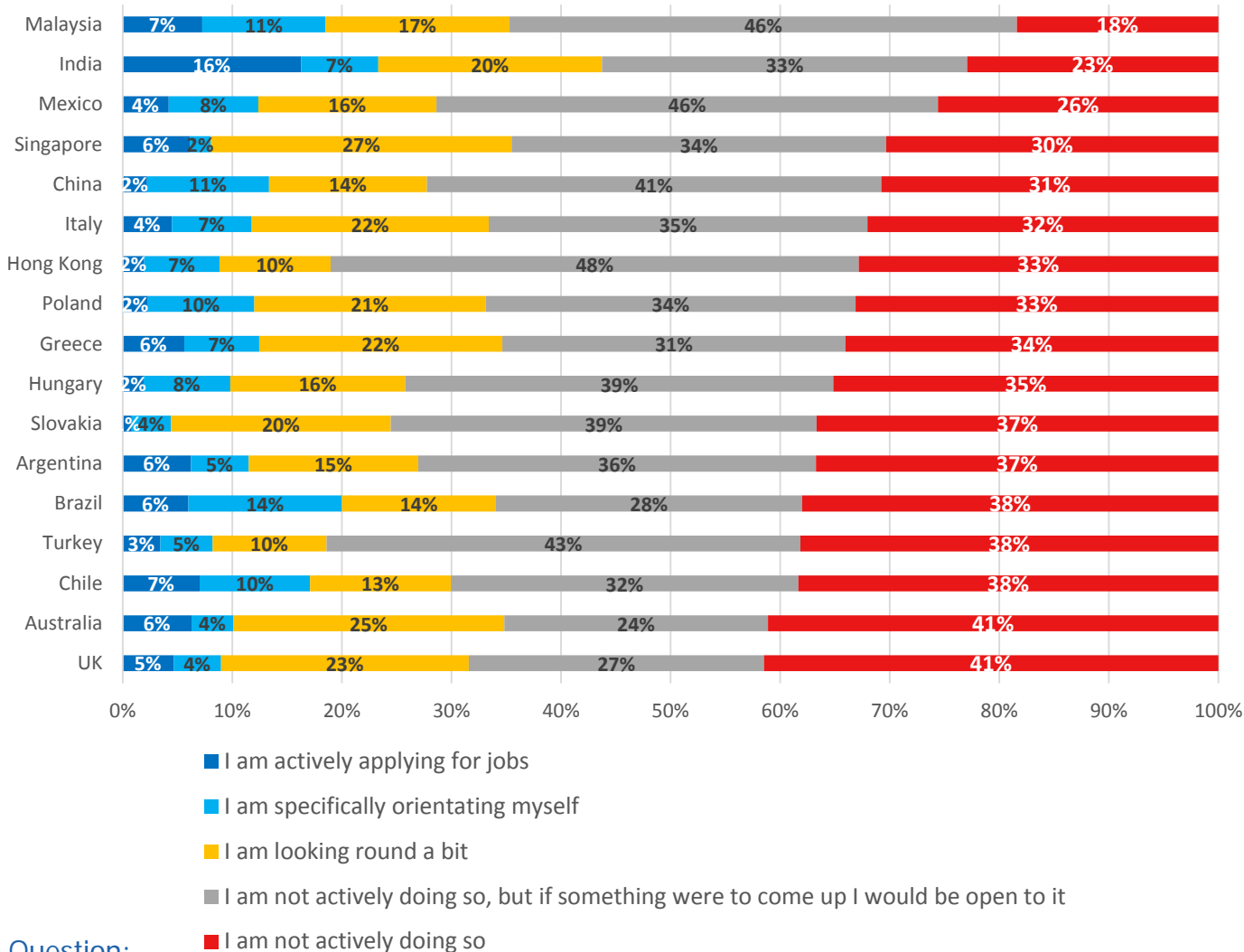


- Yes, I currently work in a comparable position at another employer
- Yes, I currently work in a different position at the same employer
- Yes, I currently work in a different position at a different employer
- No, I did not change positions or employers during the past 6 months

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

# JOB CHANGE APPETITE

# Maylasia and India highest appetite for job change



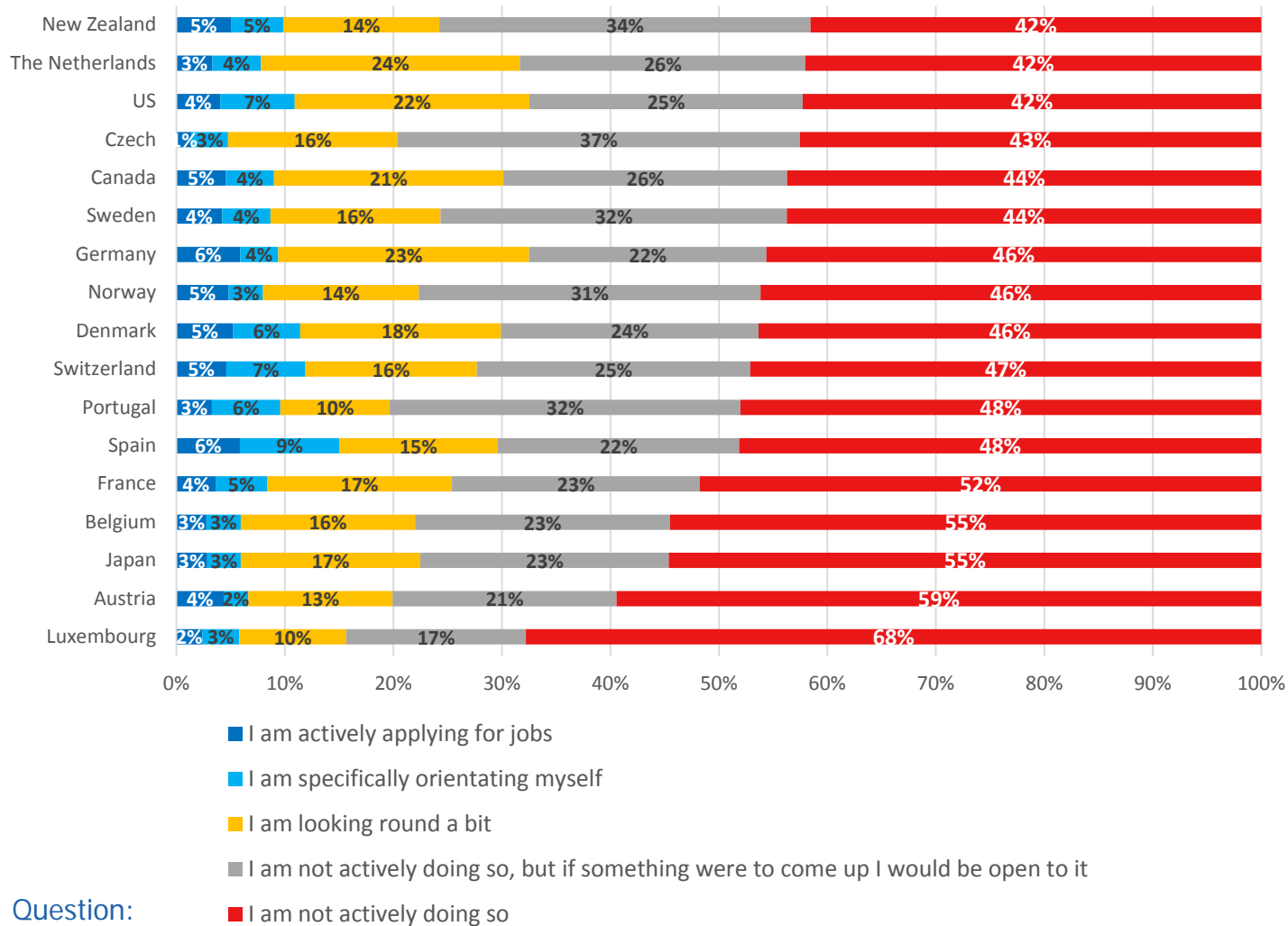
Compared to last quarter, the job appetite increased in China, Greece, Hong Kong, Luxembourg, Malaysia, Mexico, New Zealand and Slovakia.

Australia, Brazil, Denmark, Poland, Portugal, Singapore and the Netherlands show a decrease in appetite compared to last quarter.

Question:

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

# Luxembourg lowest appetite for job change



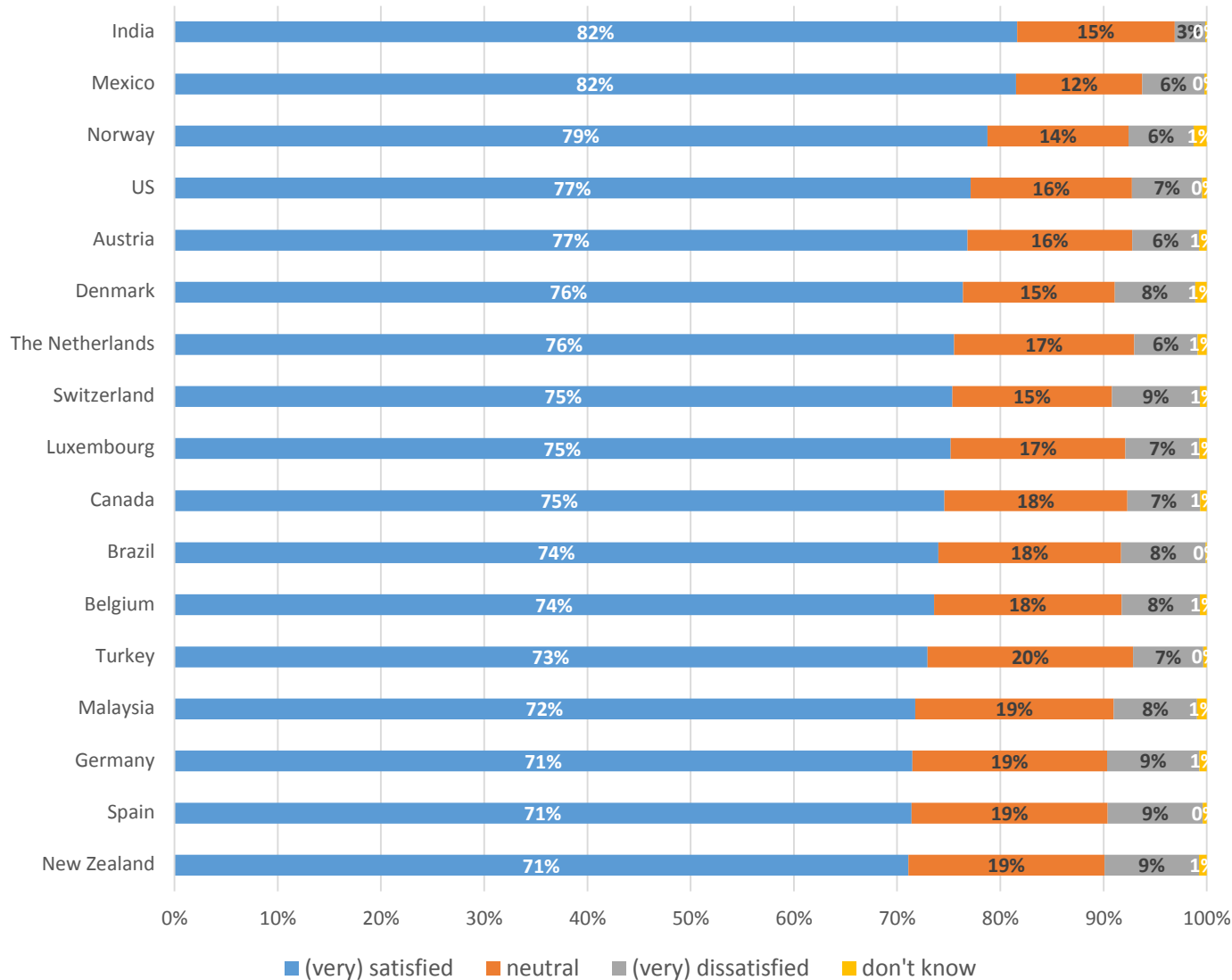
Question:

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

# JOB SATISFACTION



# job satisfaction is highest in India and Mexico



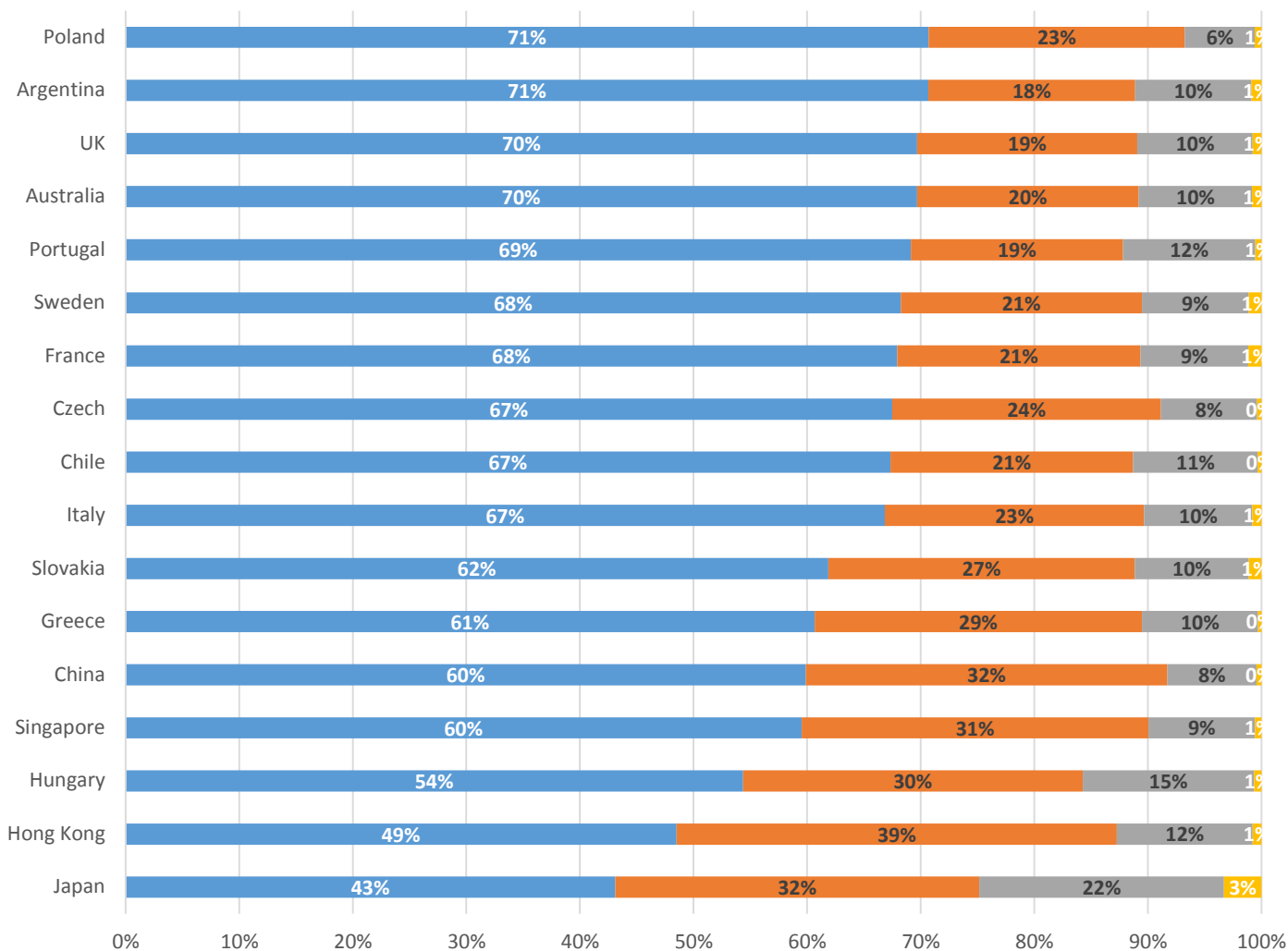
Job satisfaction decreased in Argentina, Austria, Denmark, Germany, Greece, Hungary, Japan, Portugal, Spain and Switzerland.

There are no positive shifts in job satisfaction compared to last quarter.

Question:

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

# job satisfaction lowest in Japan



Question:

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

•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 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 survey of 2016 was conducted from April 22<sup>nd</sup> till May 9<sup>th</sup> 2016 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	US

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