

global report Randstad Workmonitor 1st quarter 2016

Technology and the human touch

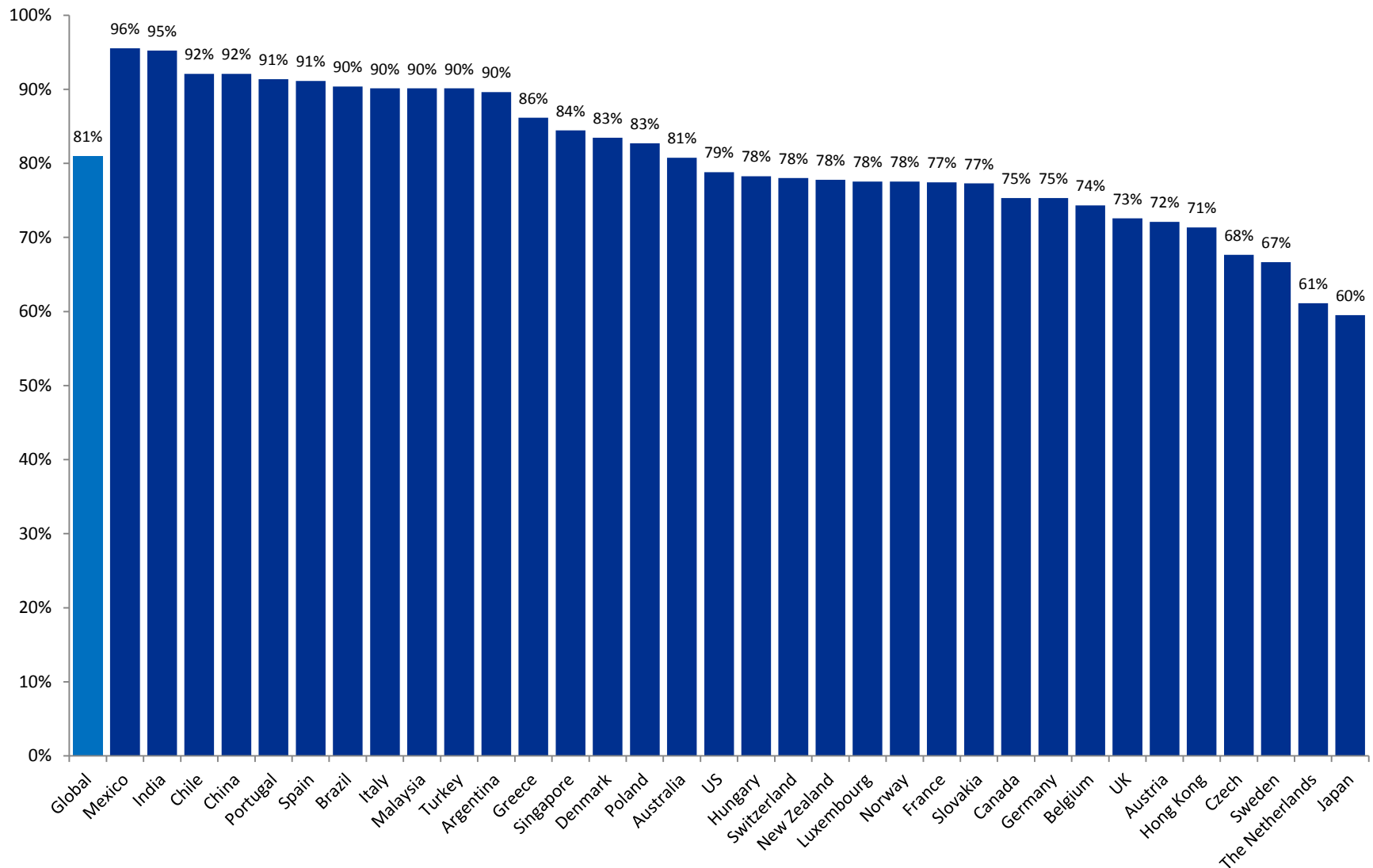
incl. quarterly mobility, job change and job satisfaction

Group Communications
Randstad Holding nv
March 2016

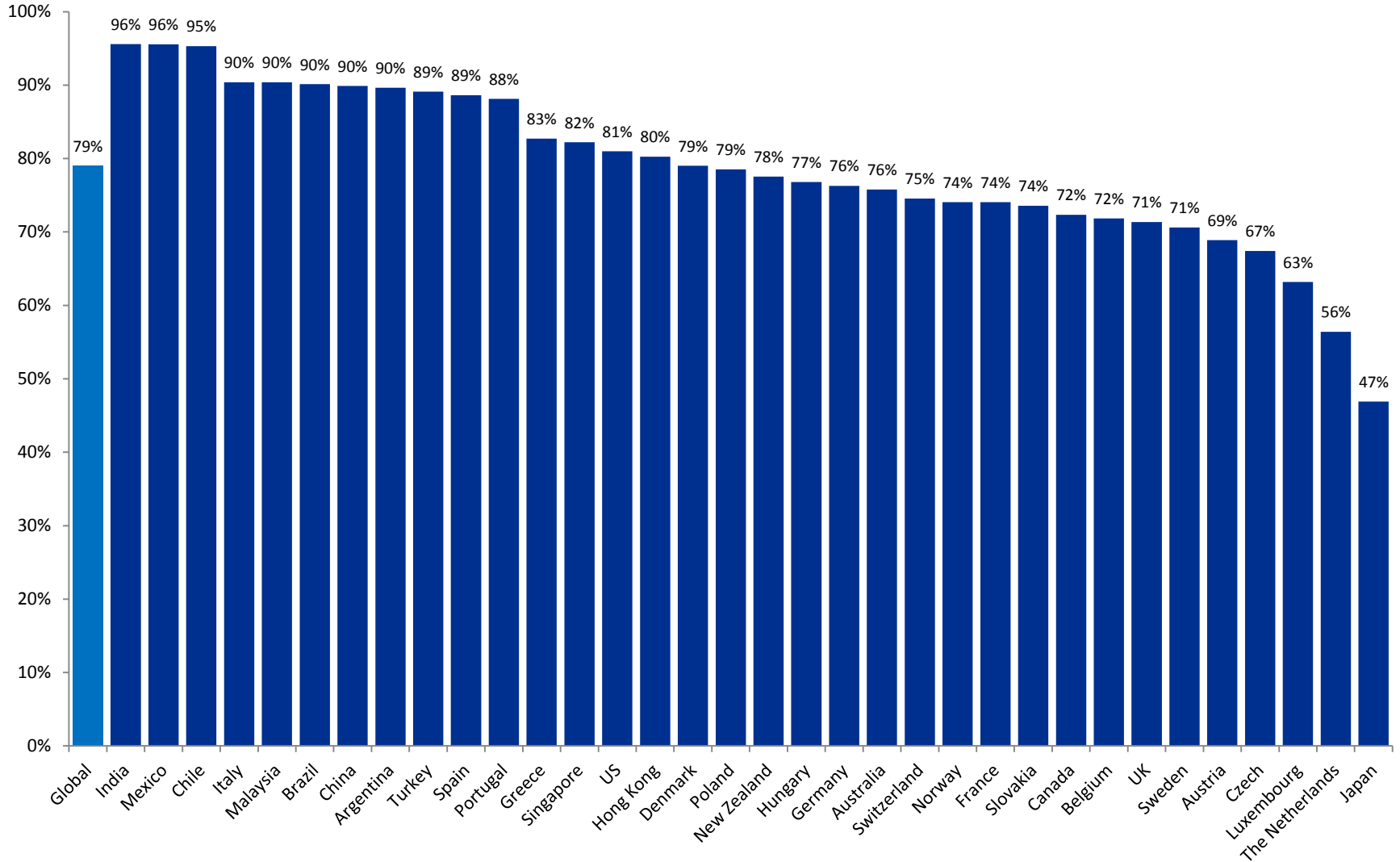


- 1) IMPACT OF TECHNOLOGY AND DIGITALIZATION
- 2) WORKING GLOBALLY

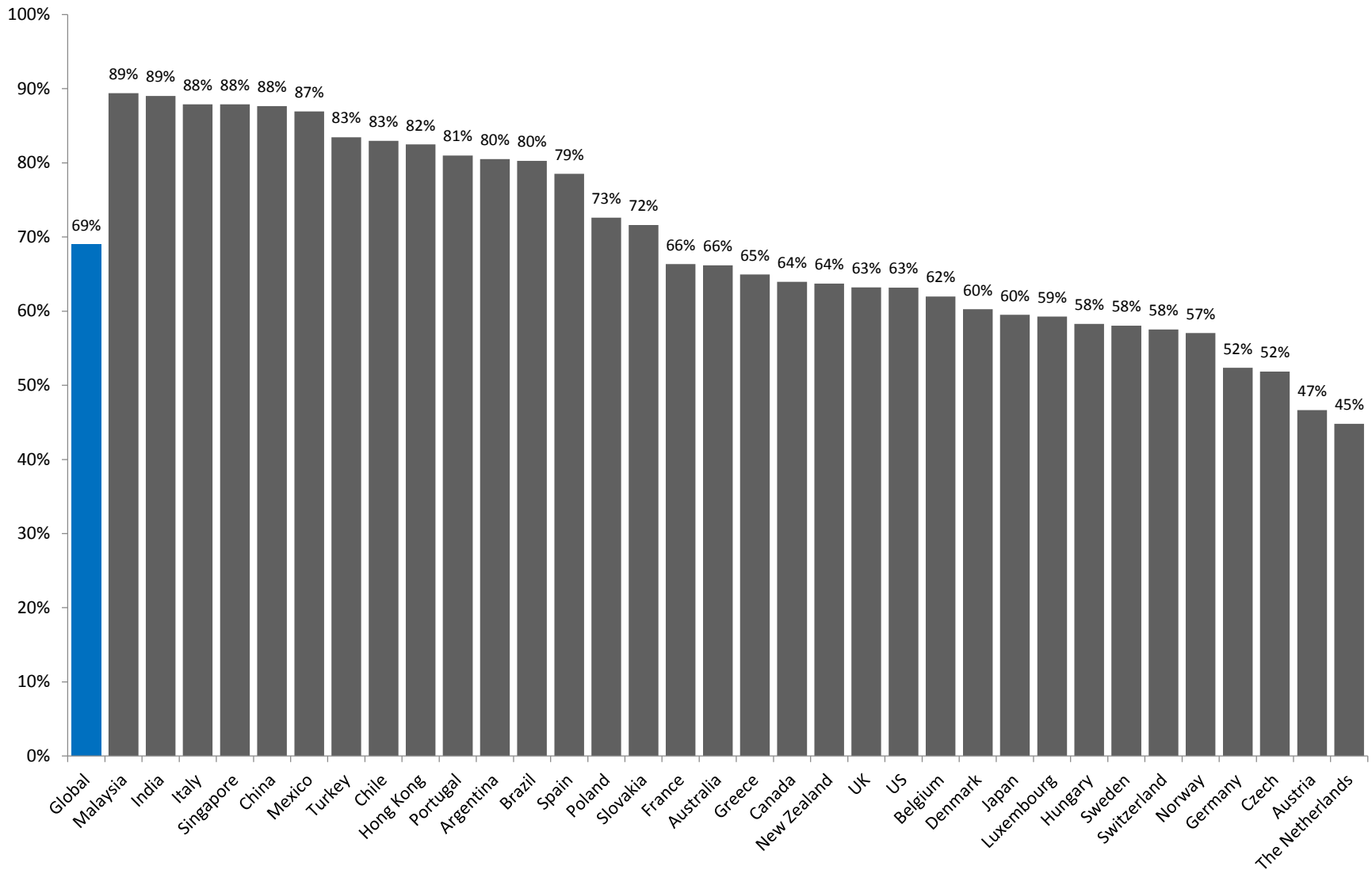
81% agree that technology and digitalization has a major impact on their job



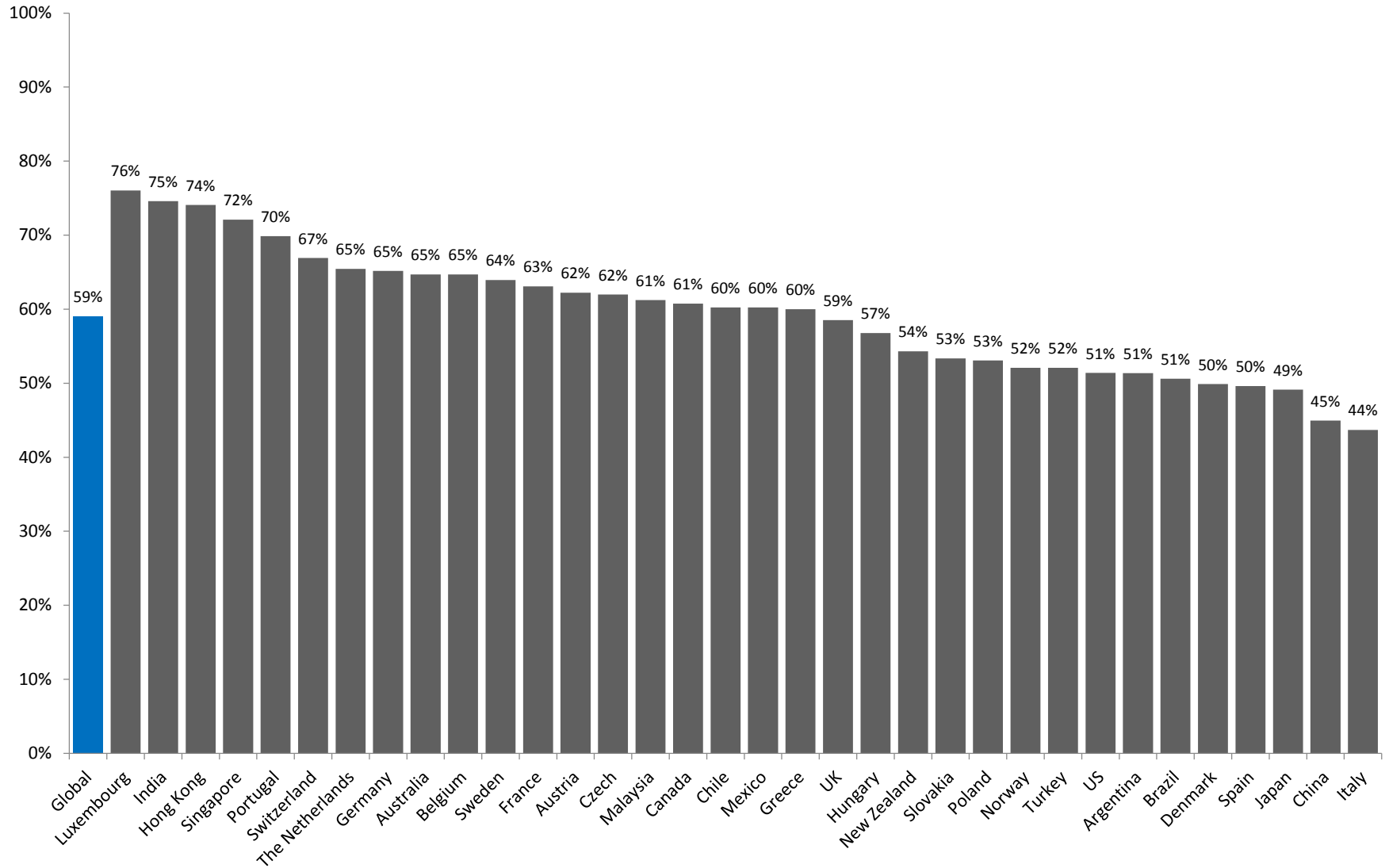
79% point out that they see the increasing impact of technology on their job as an opportunity



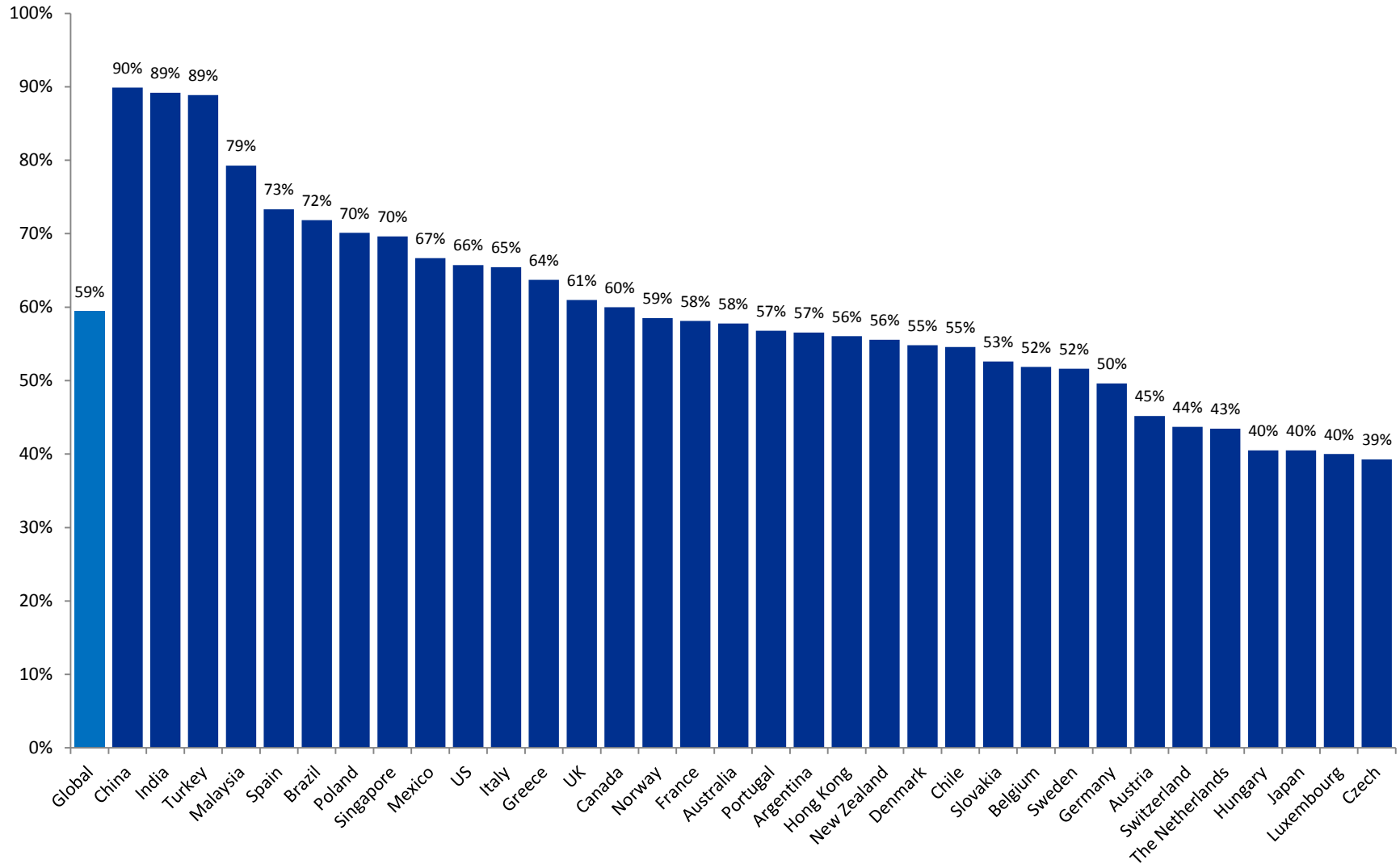
69% feel that they need more training to keep up with the developments in technology



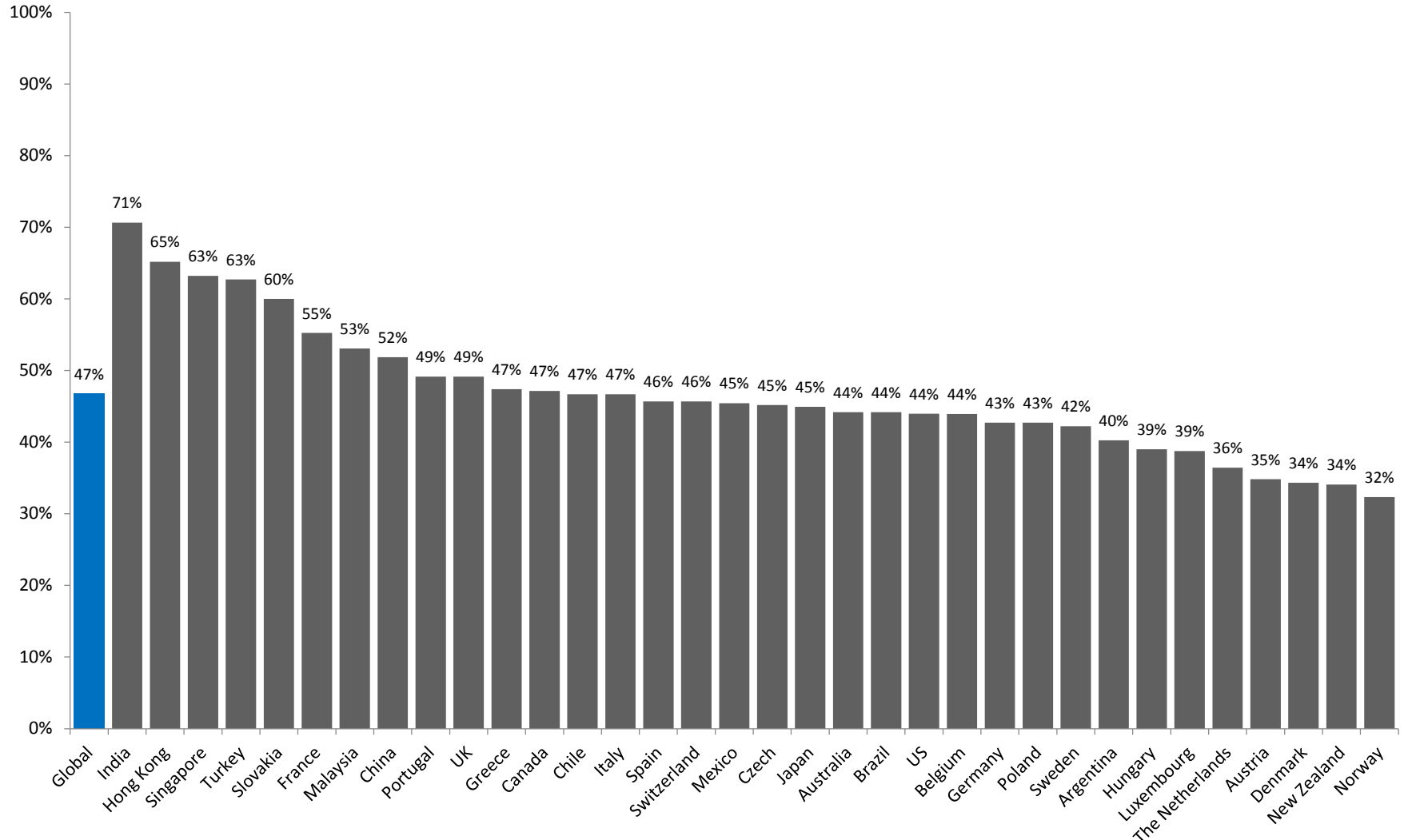
59% feel that technology makes society less humane



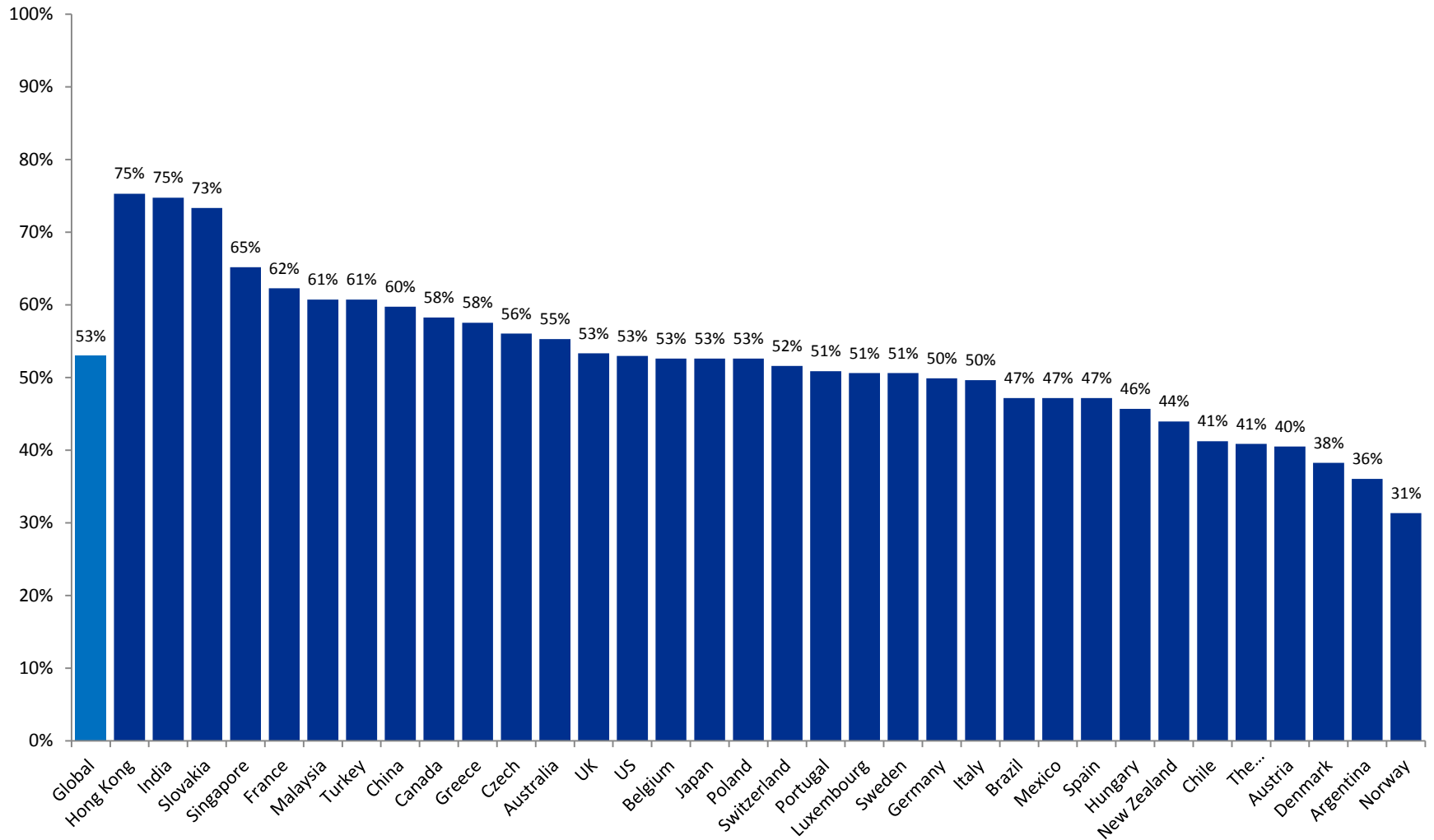
59% see technology and its global reach as an enabler to create a more humane society



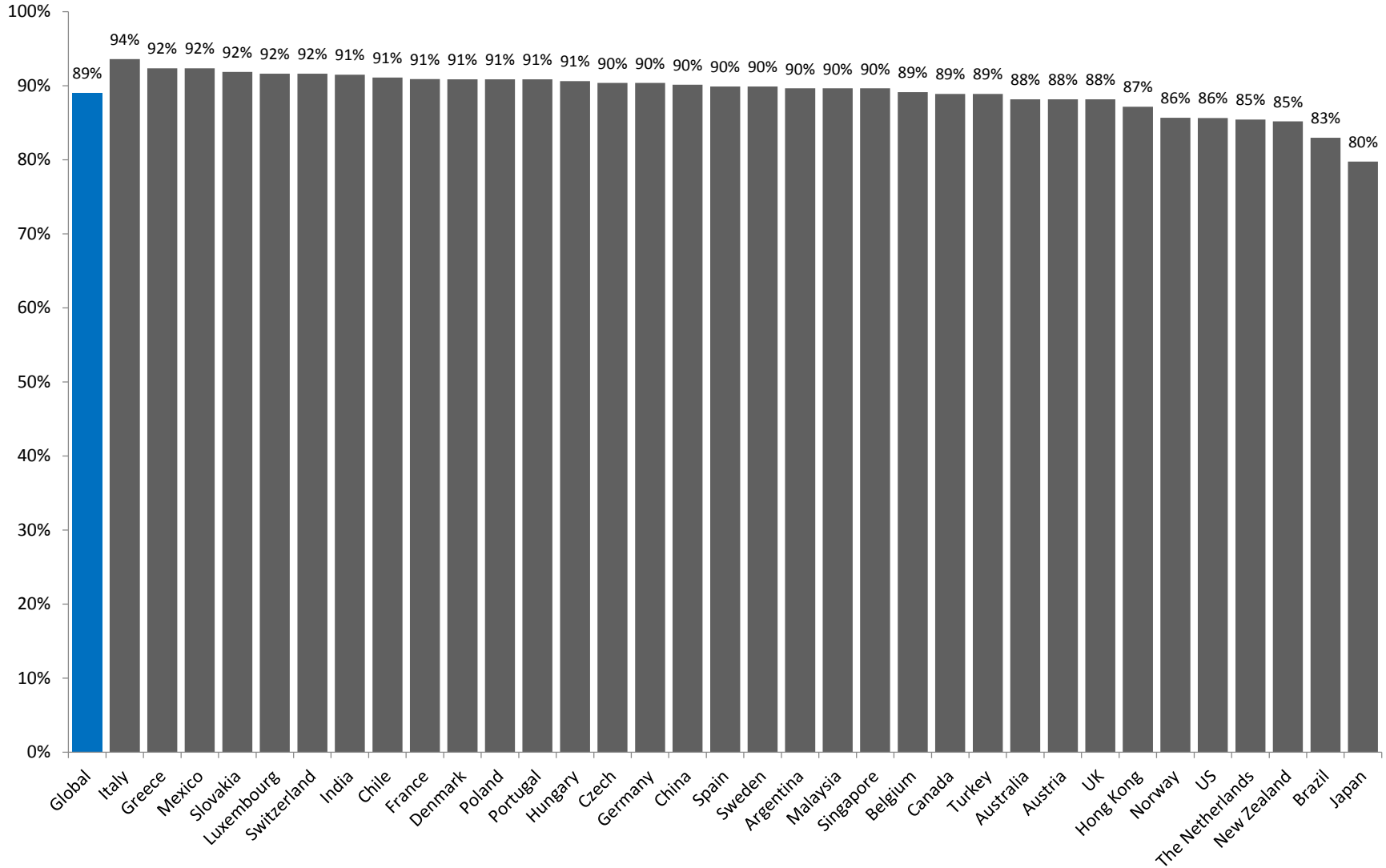
47% agree that the omnipresence of technology in the workplace make them feel less connected to their co-workers



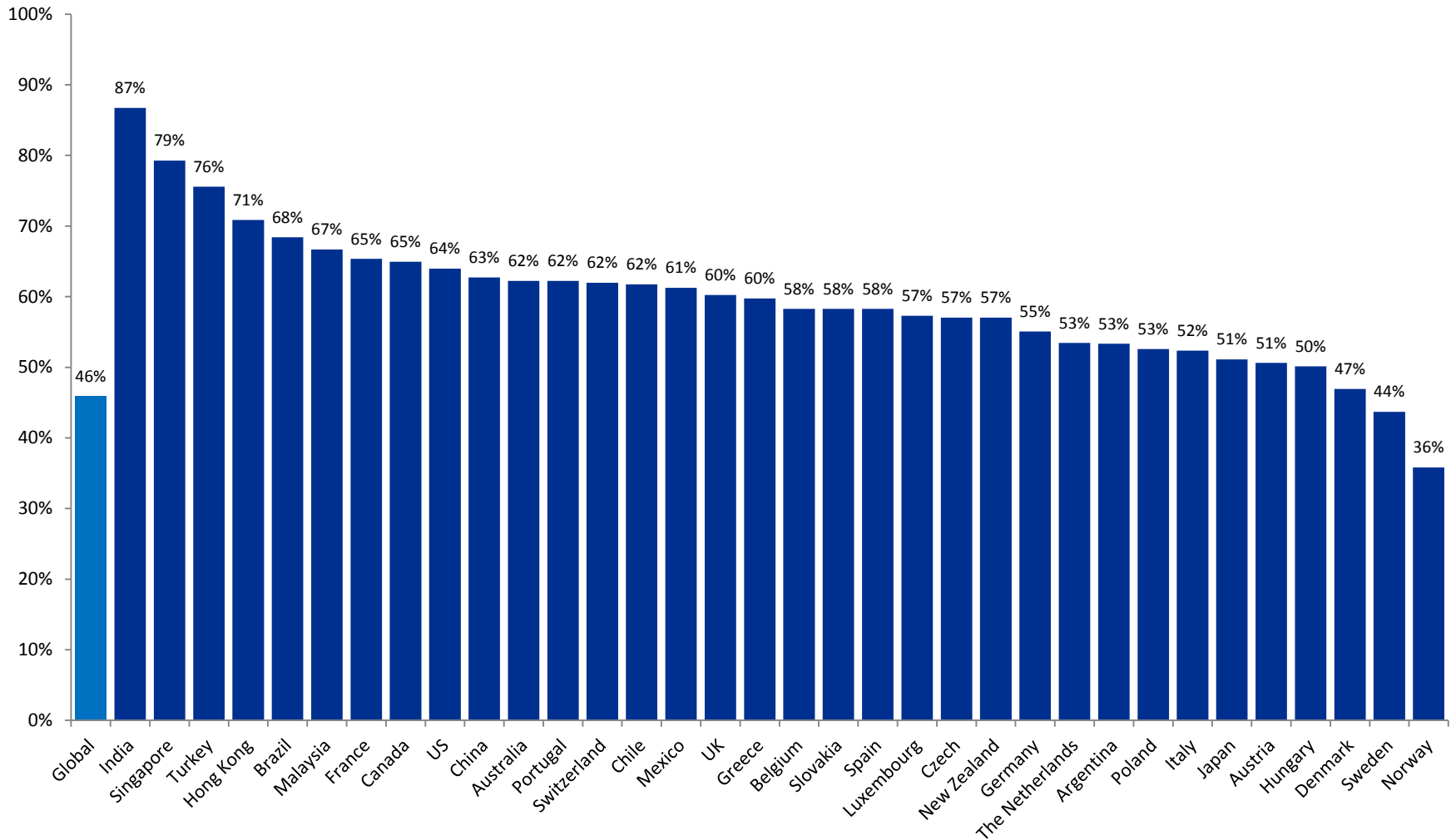
53% agree that the omnipresence of technology makes them feel less connected to people in the real world



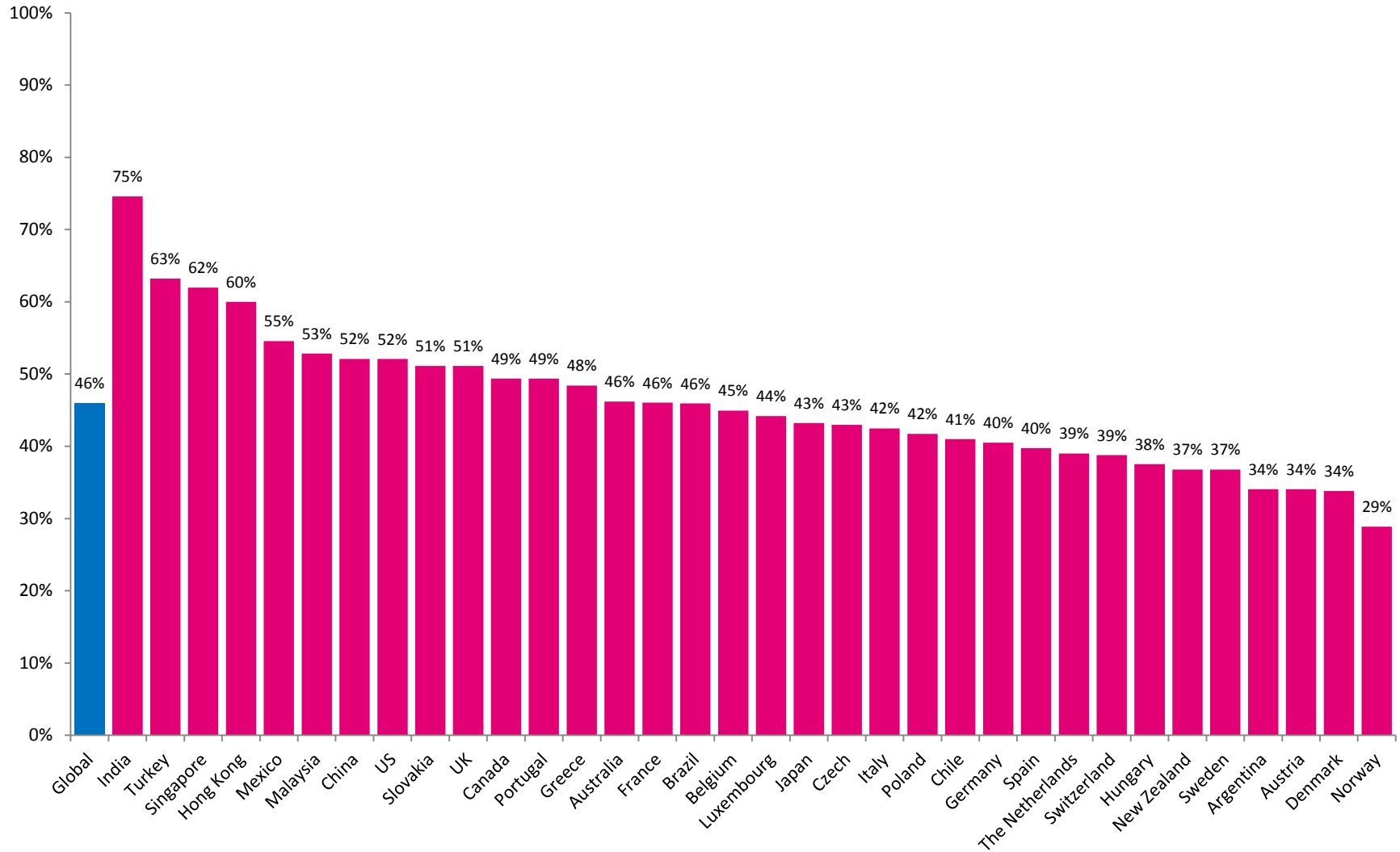
89% believe that a face-to-face meeting is the best way to interact with someone



46% point out that due to technology their interactions with work contacts are less frequently face-to-face

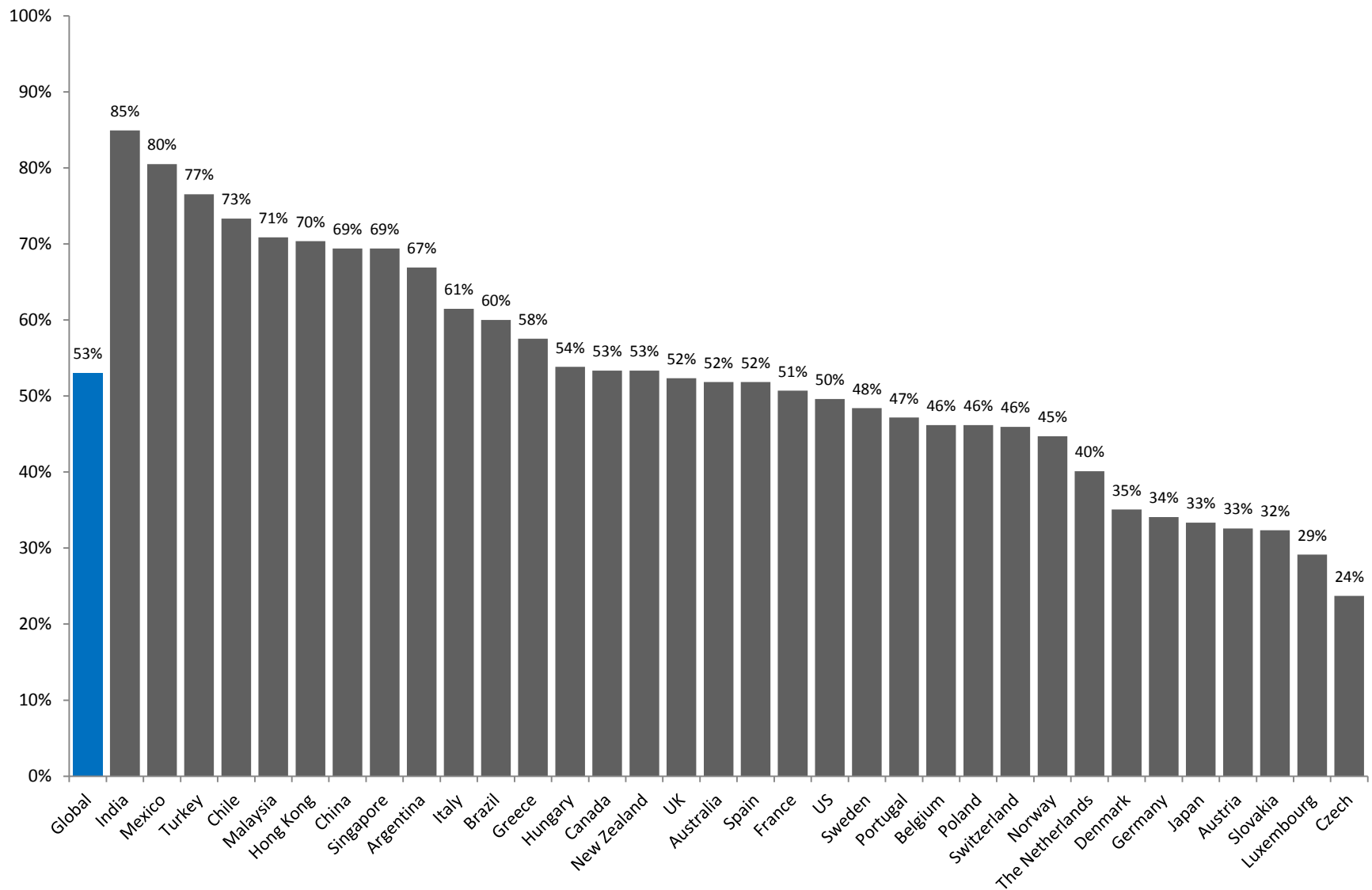


46% agree that they have fewer personal interactions with their colleagues due to technology

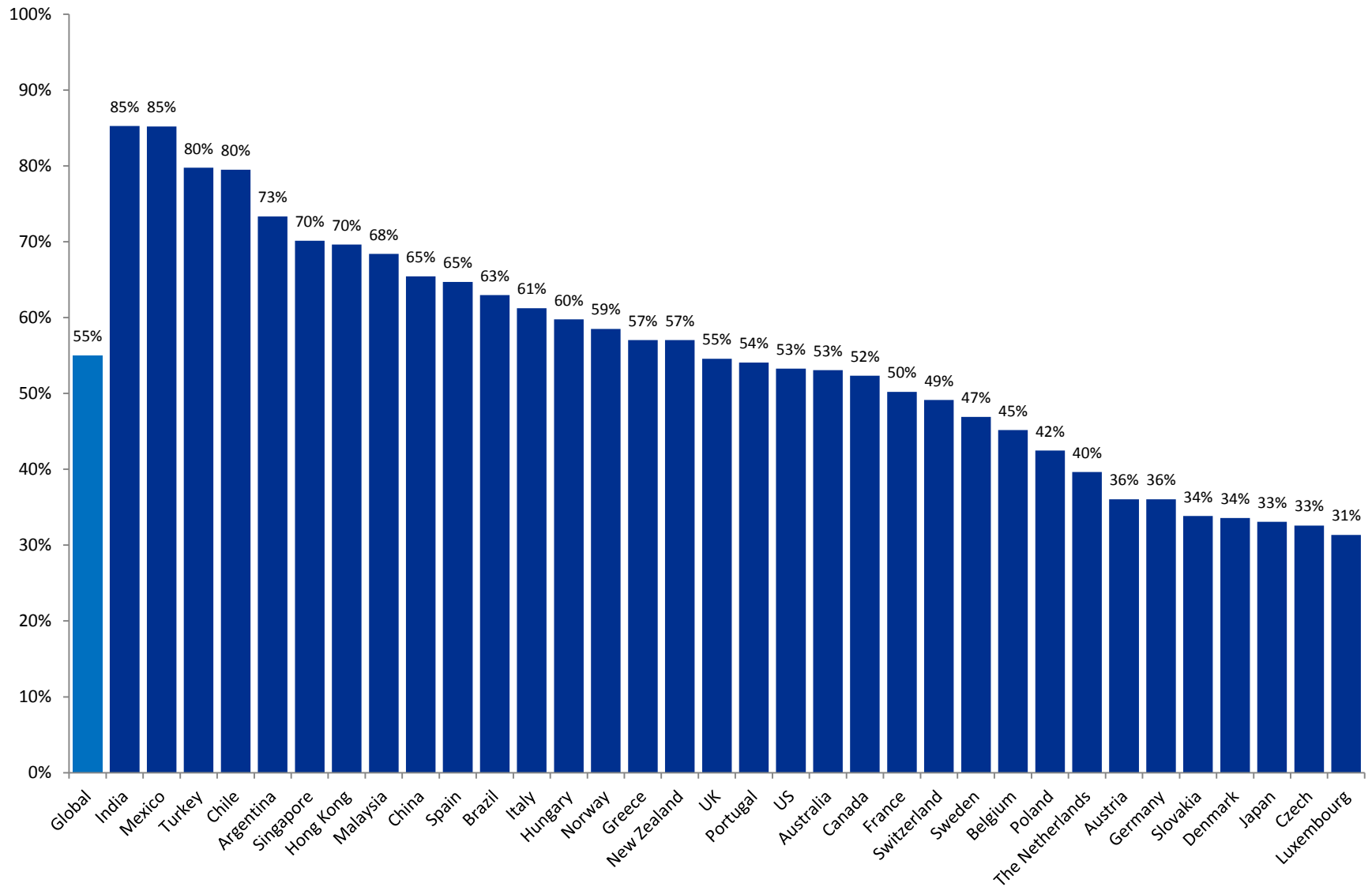


2) INTERNATIONAL TRAVEL AND WORKING ABROAD

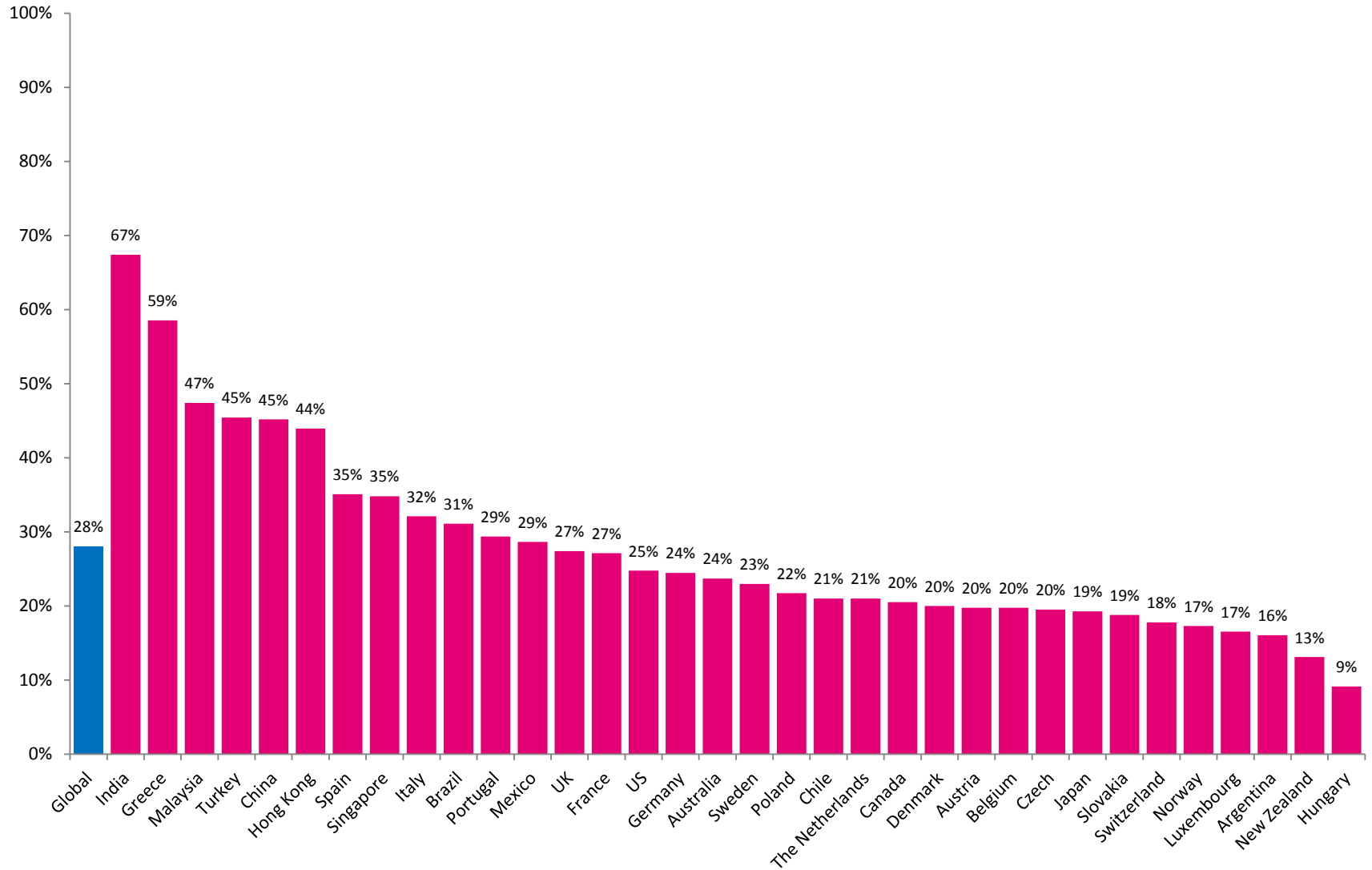
53% are interested in working abroad



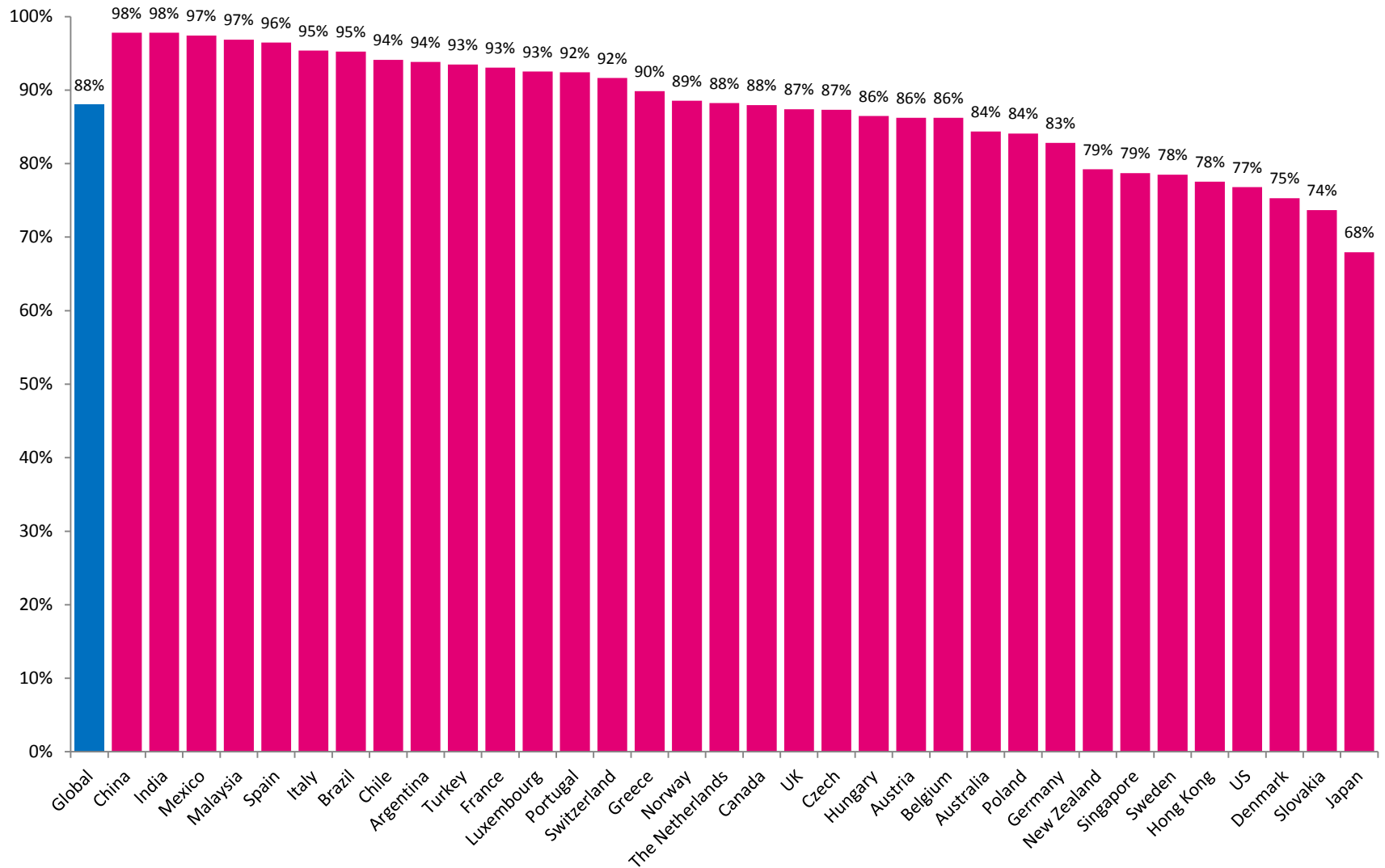
55% are willing to move abroad for the right job



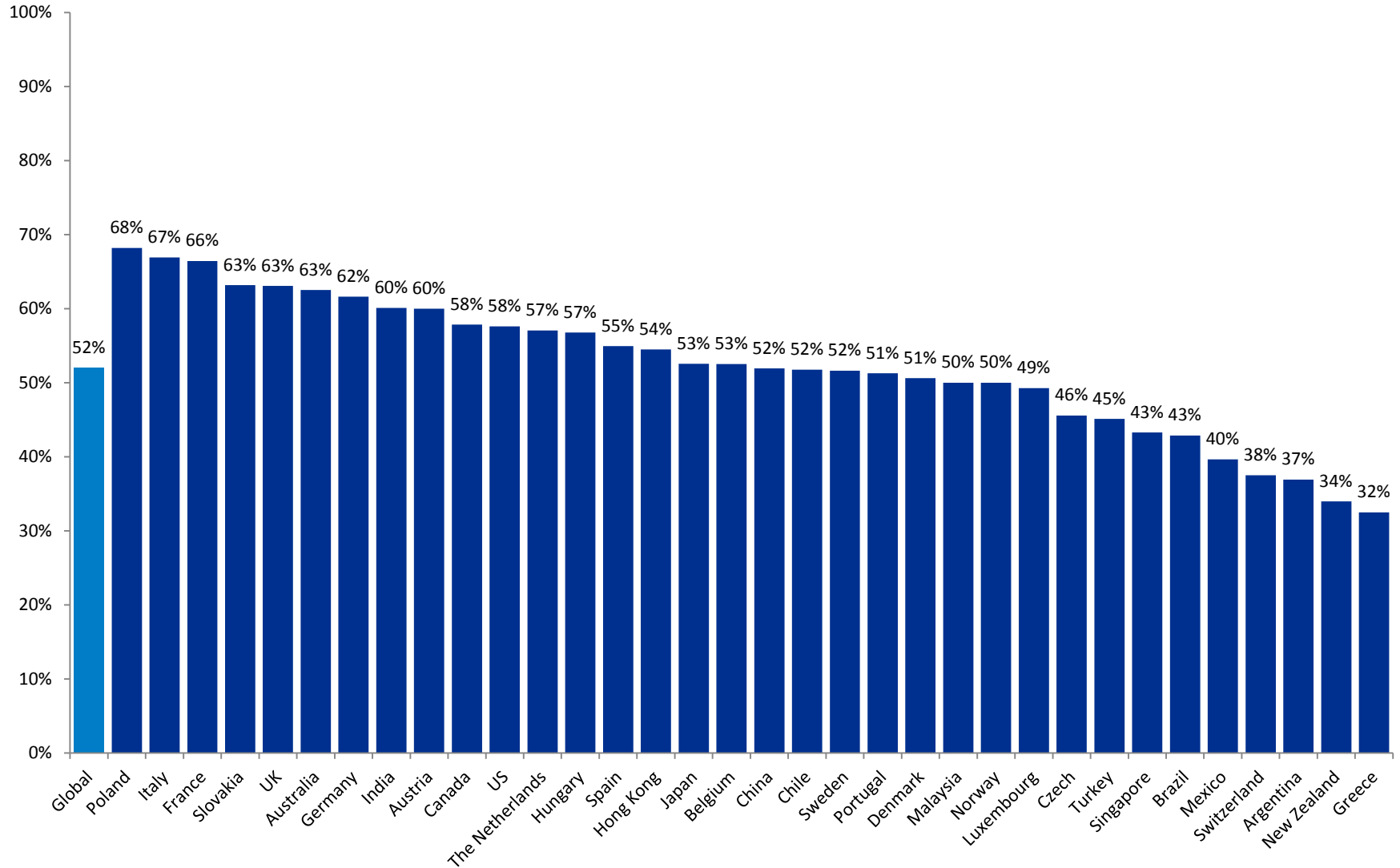
28% have a job that includes international travel



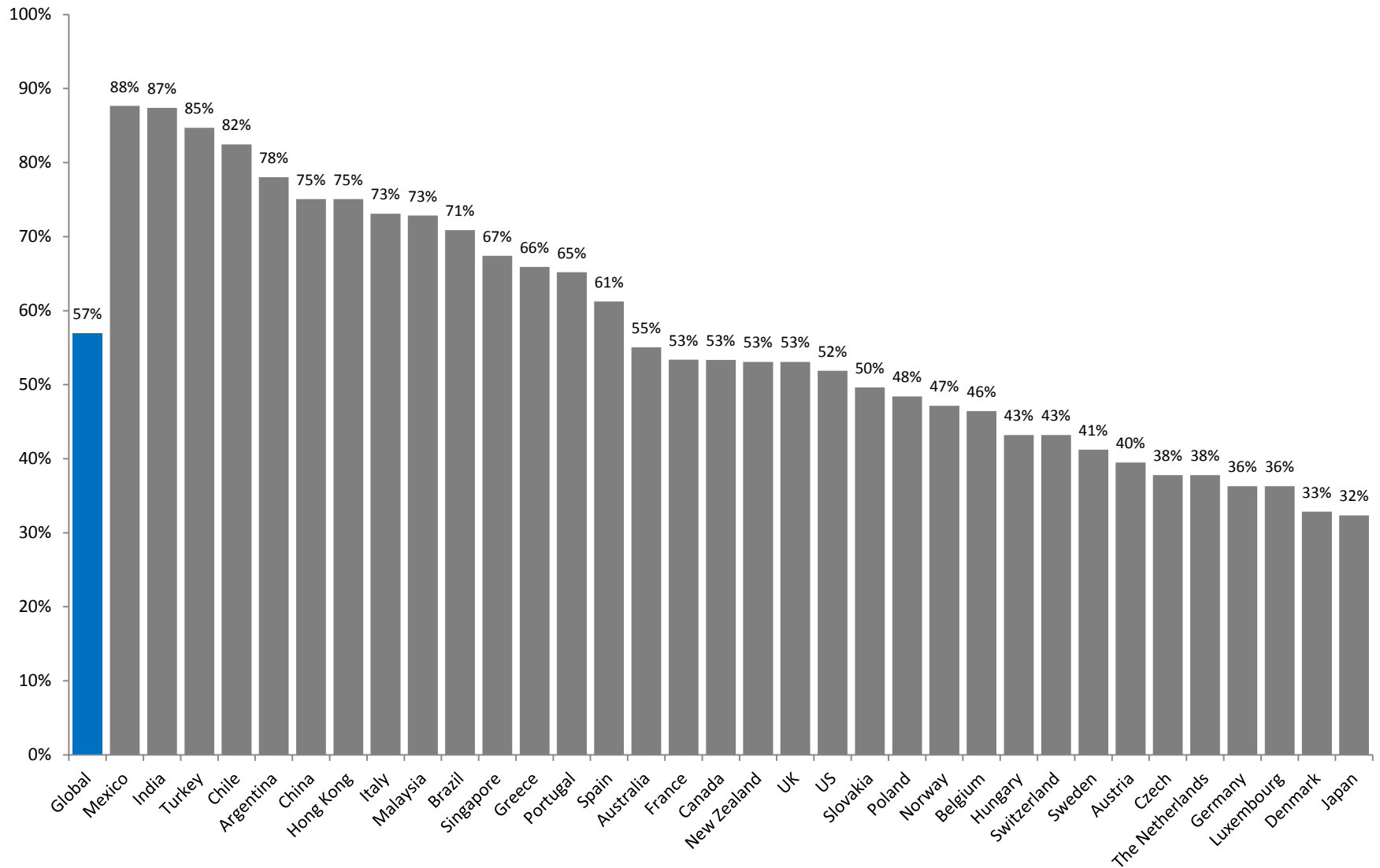
88% consider traveling for work as an added value to their job



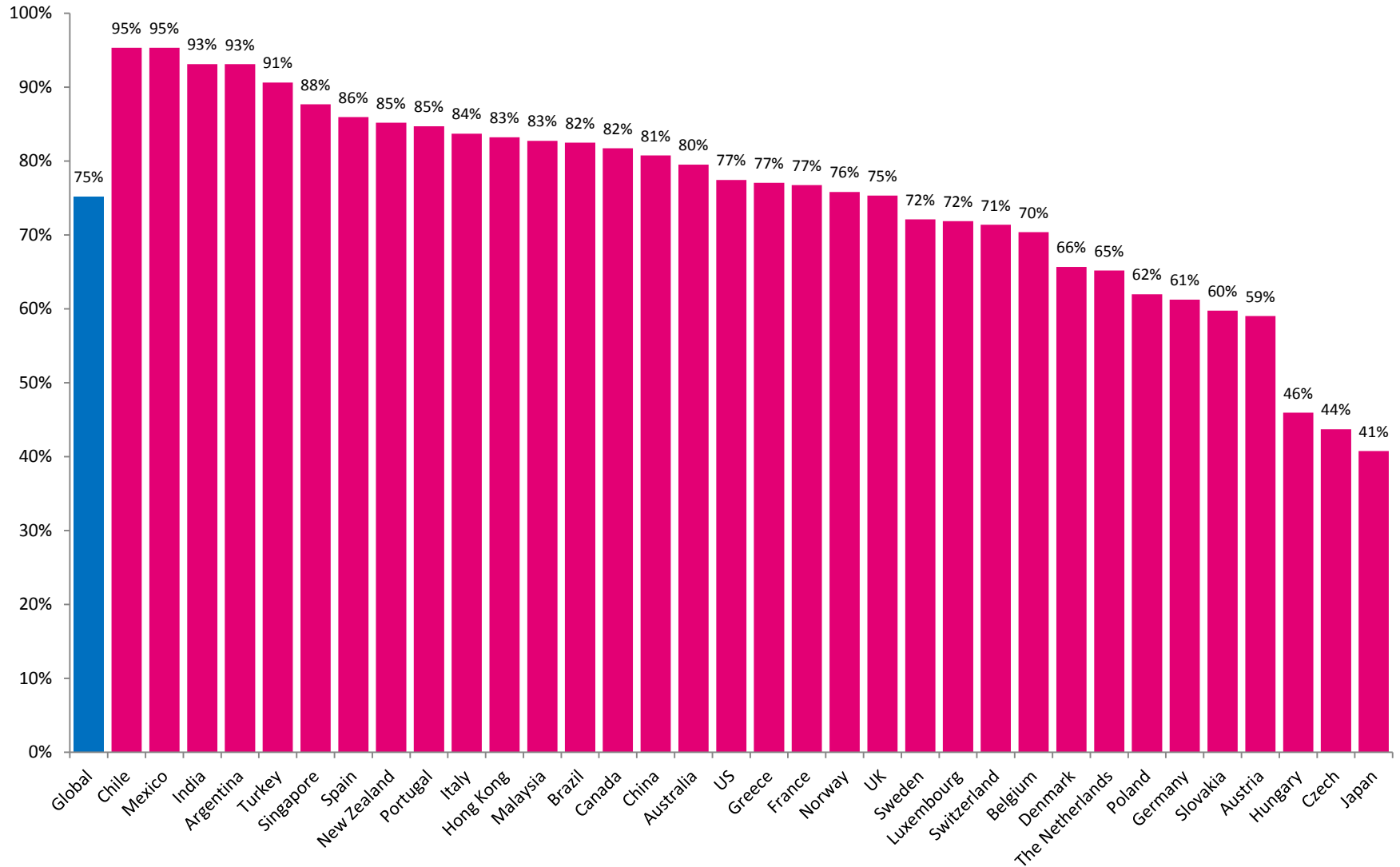
52% see traveling for work as a burden on their personal life



57% would like to have a job which requires international travel

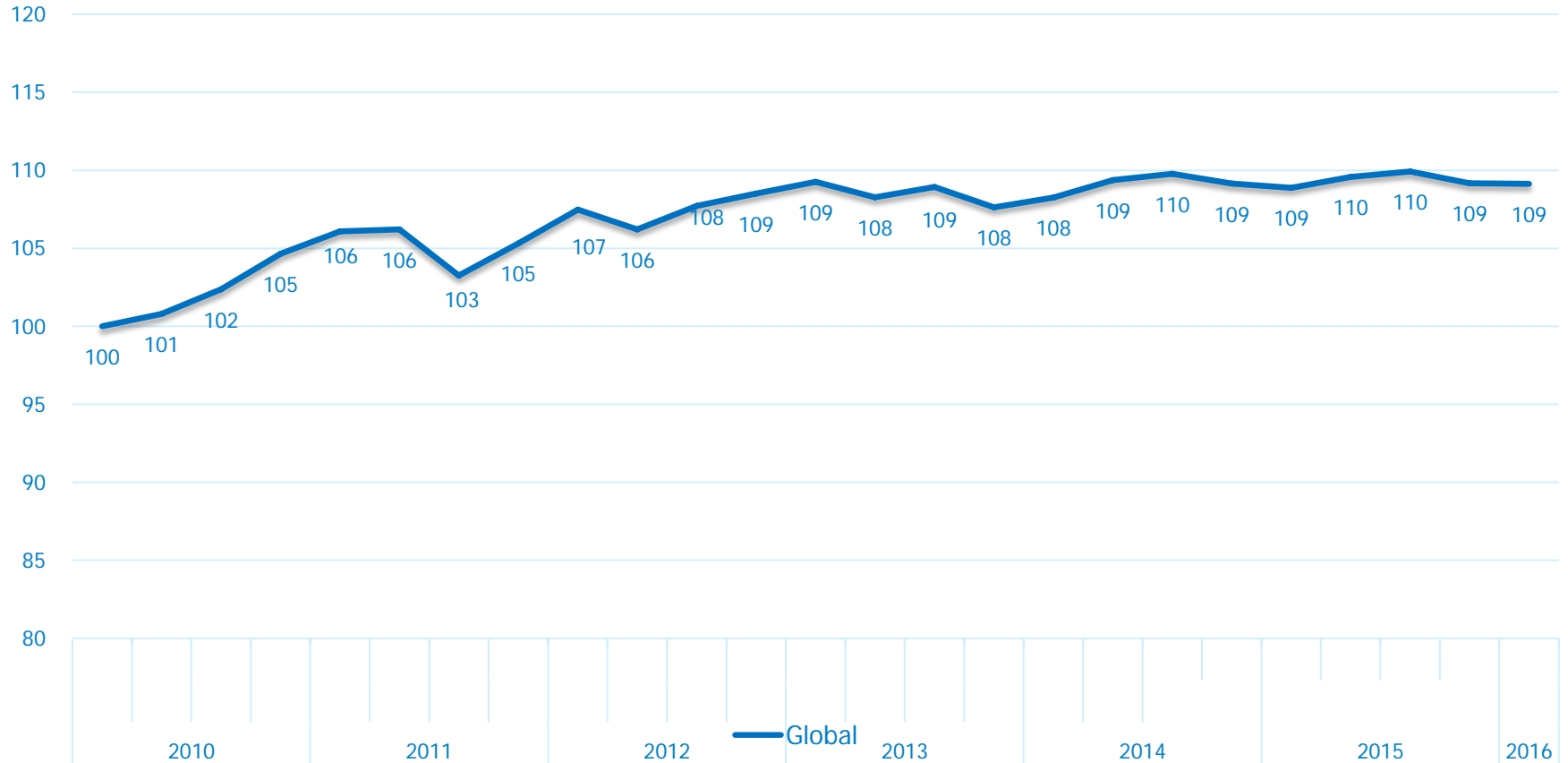


75% would like to work with colleagues from different nationalities/cultures



MOBILITY INDEX

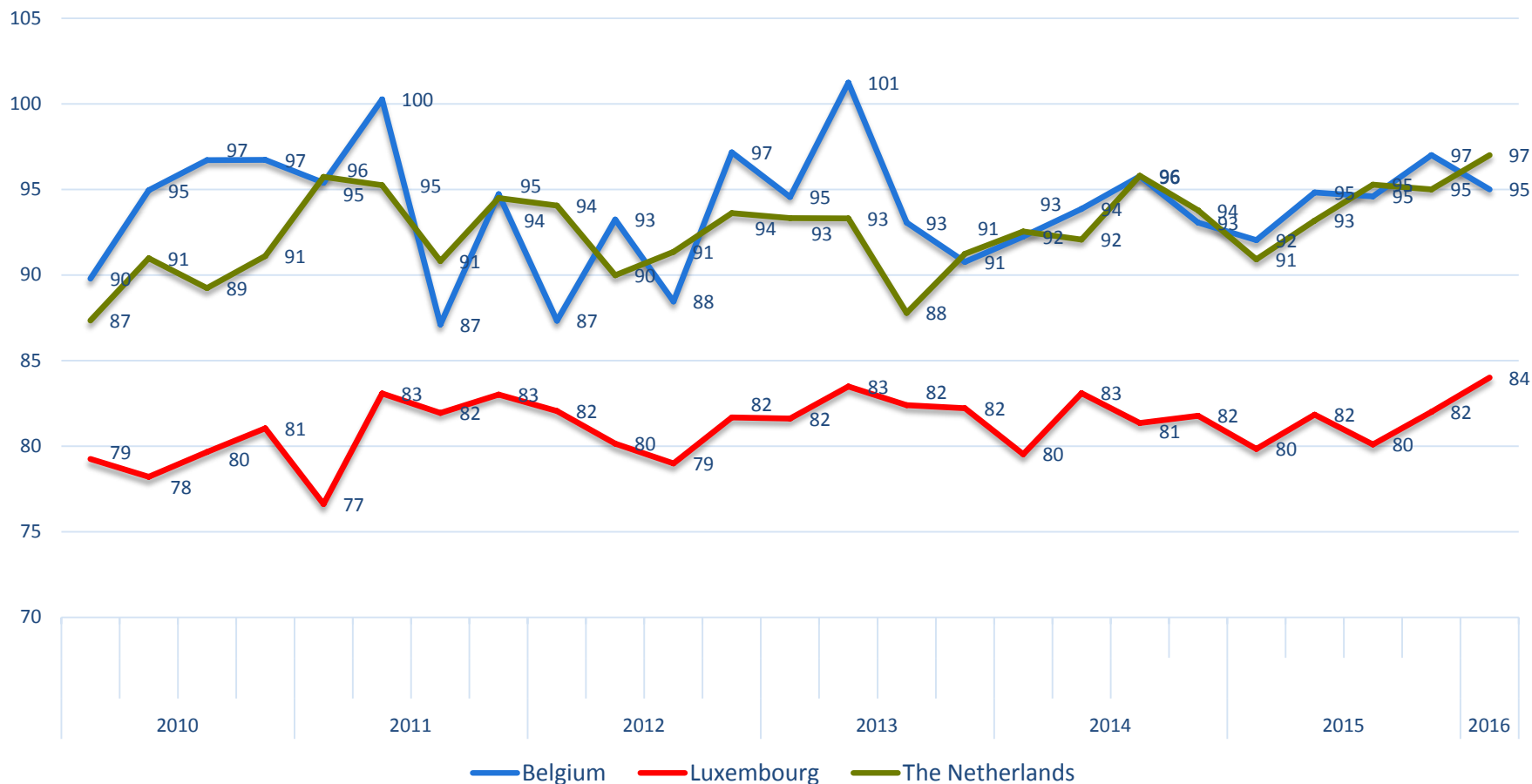
the global Mobility Index remained stable



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?

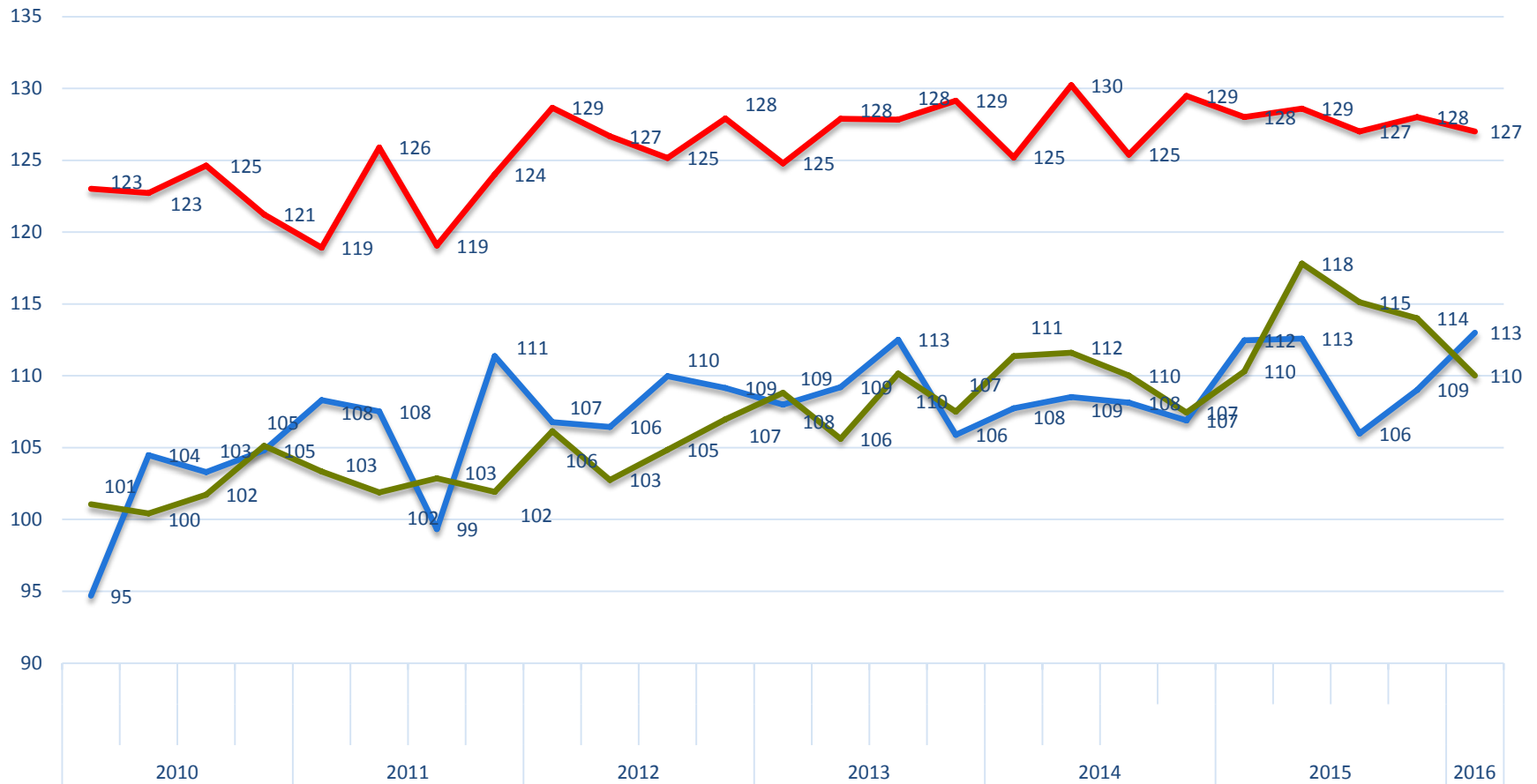
mobility Netherlands & Luxembourg +2; Belgium -1



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 Canada +4; US -4, Mexico -1

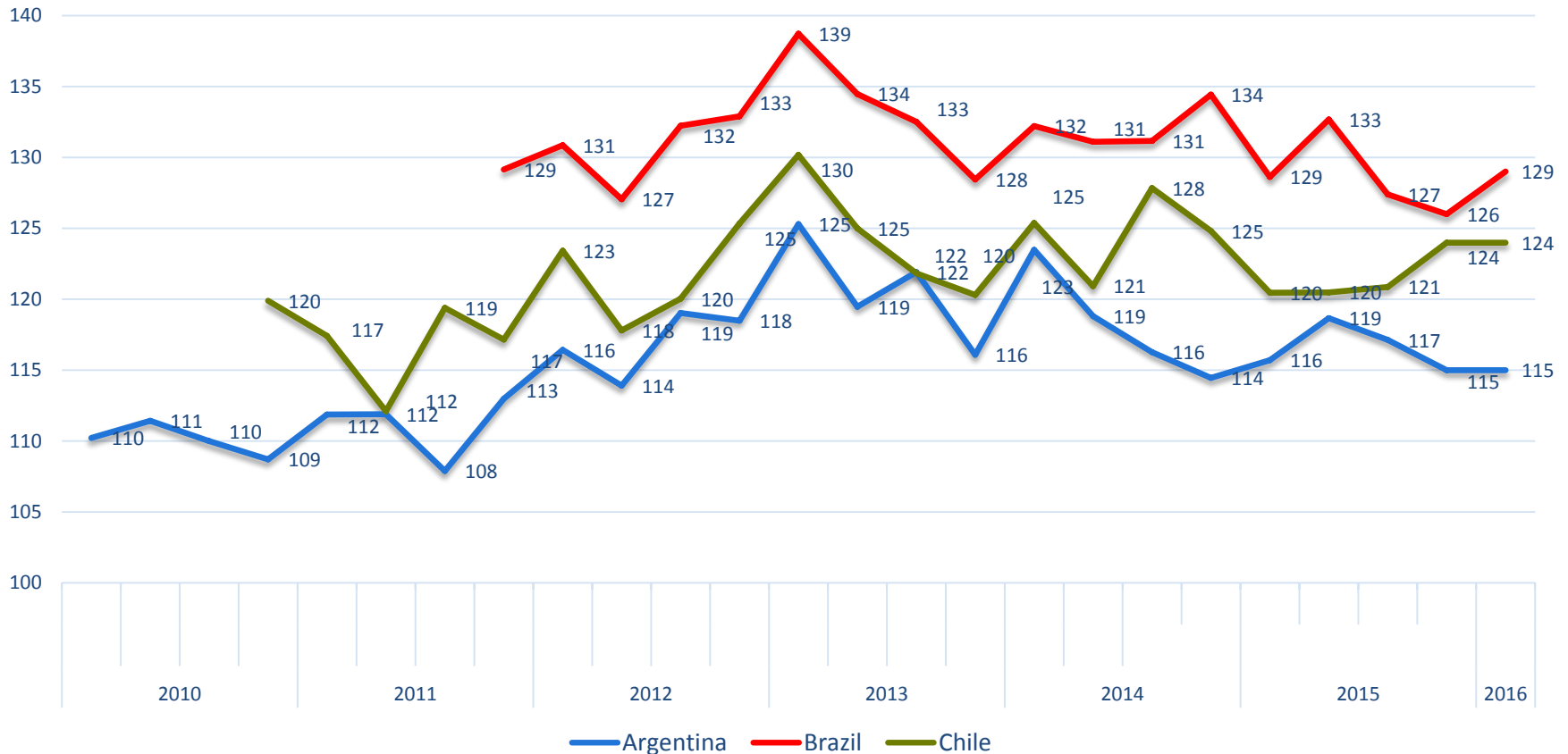


Question:

— Canada — Mexico — US

- 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?

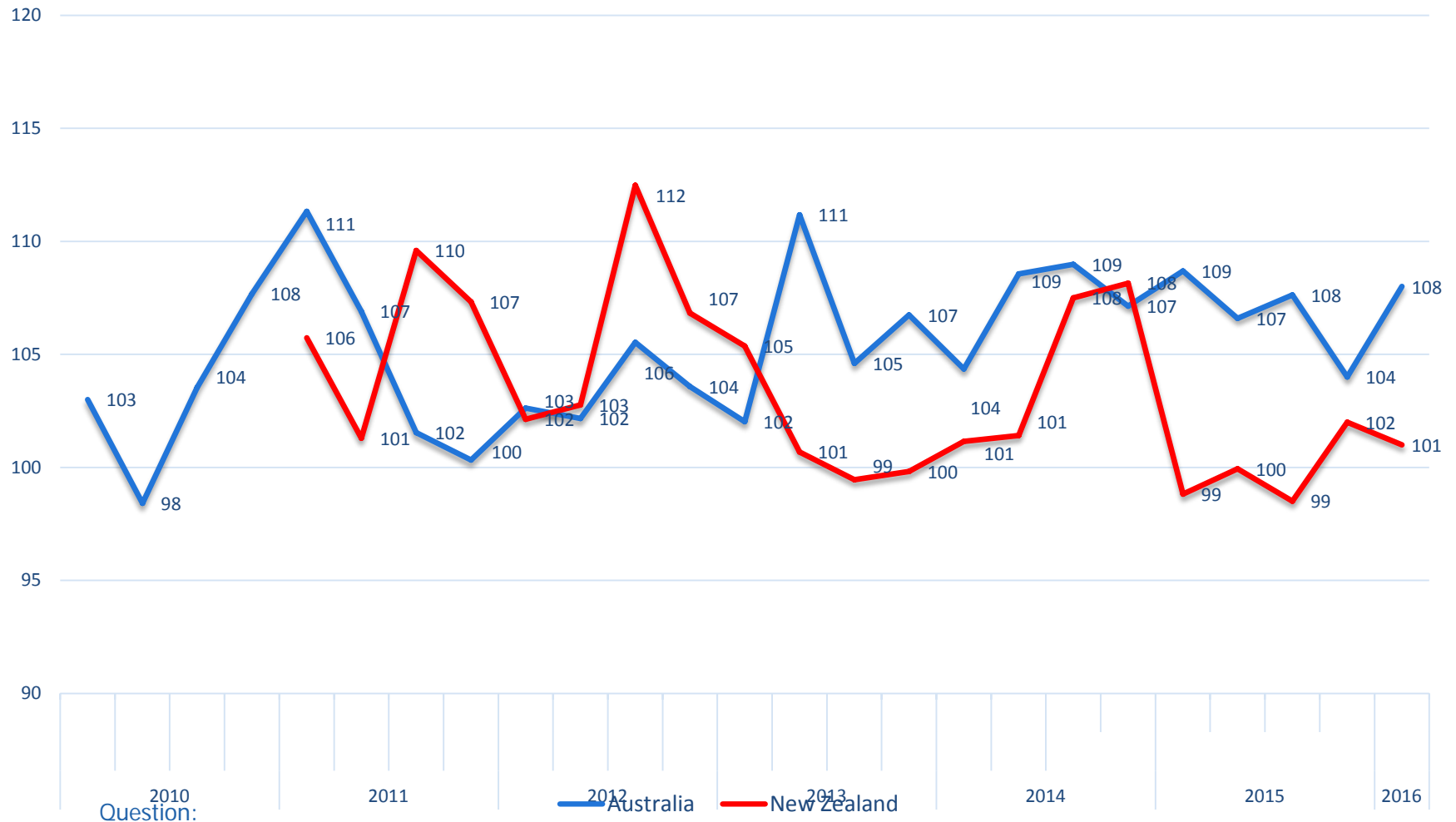
mobility Brazil +3; flat in Argentina & Chile



Question:

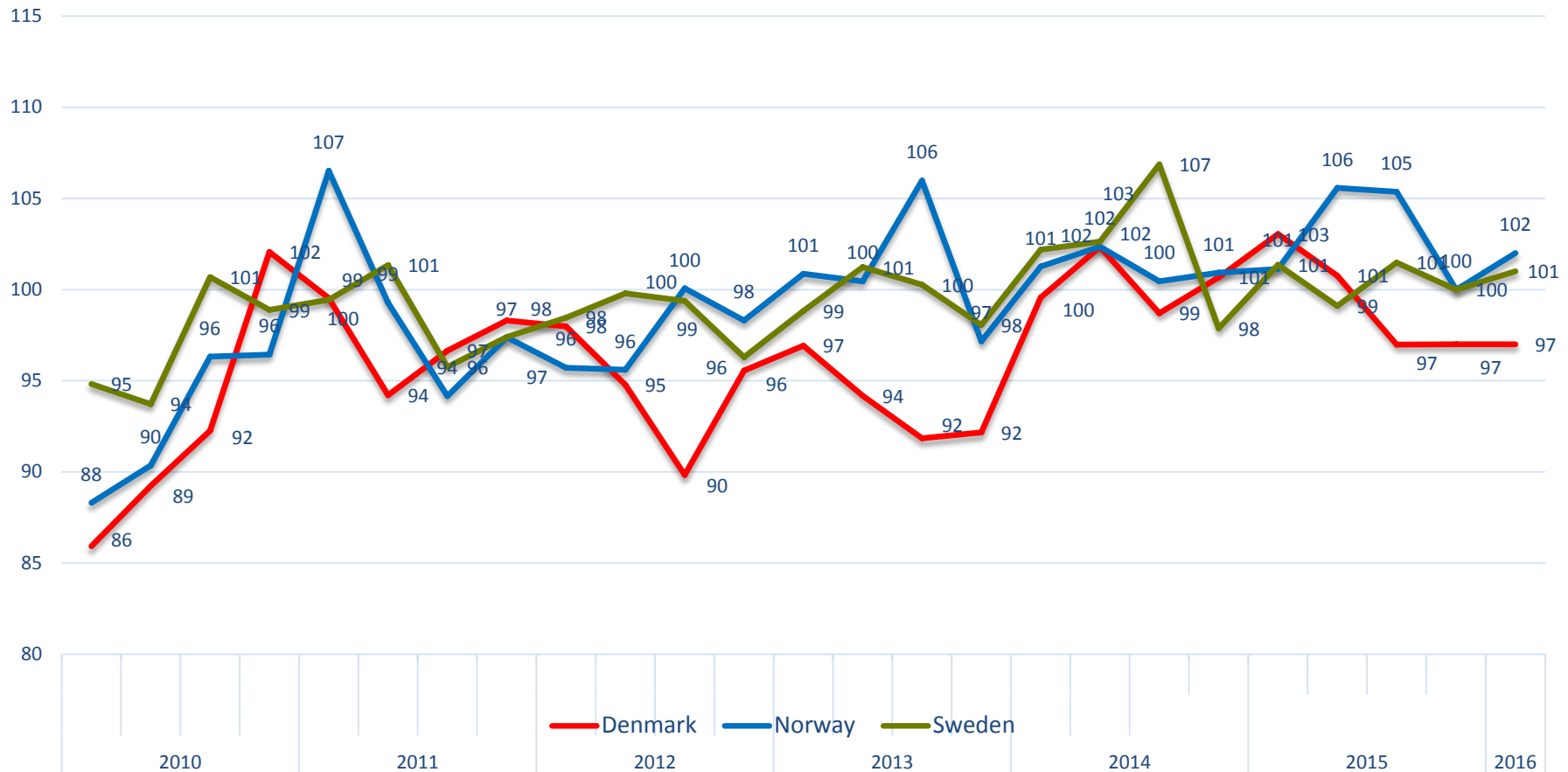
- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
- Do you think you will be doing *different work for a different employer* within the next 6 months?

mobility Australia +4; New Zealand -1



- 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?

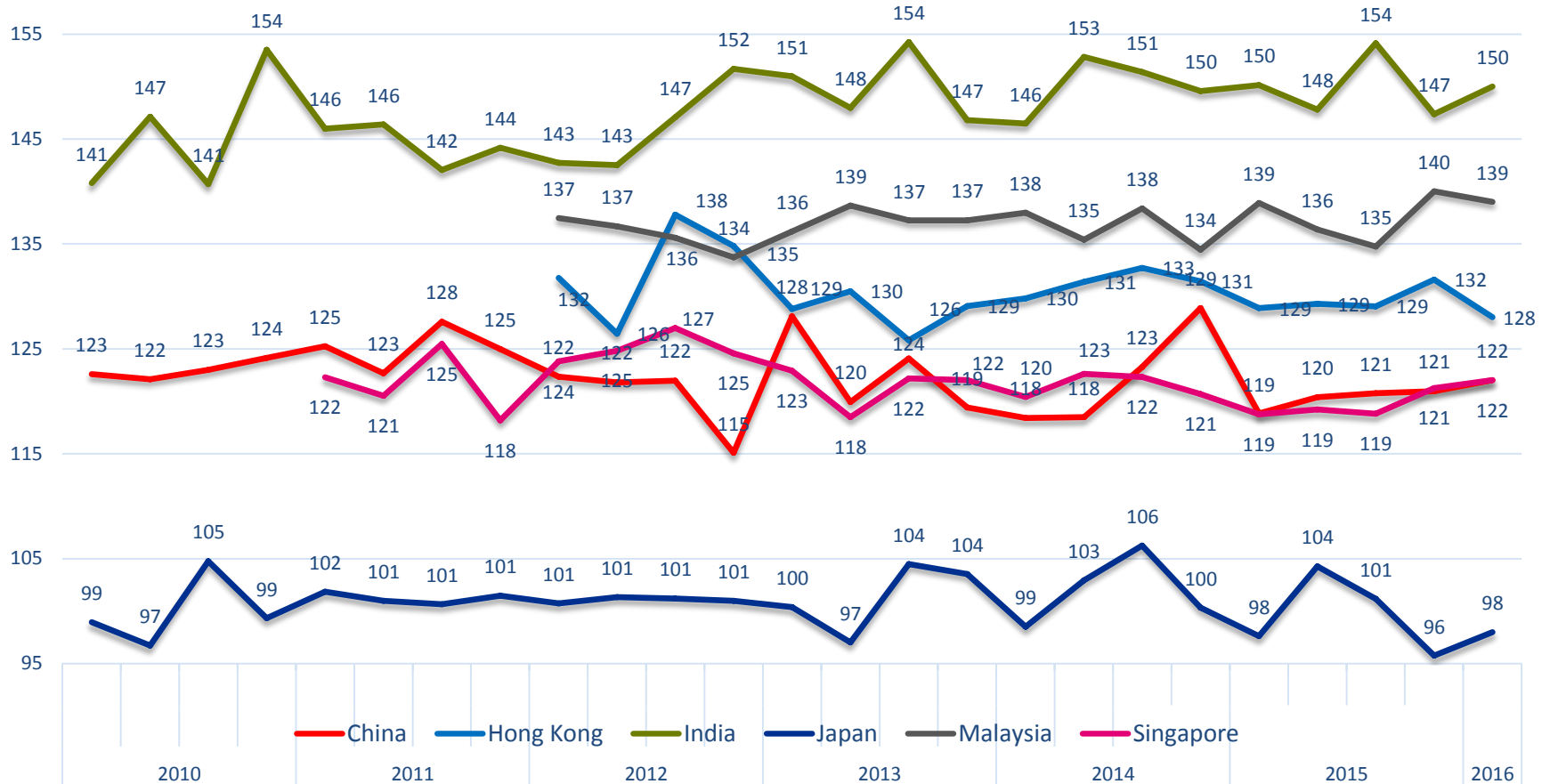
mobility Norway +2; Sweden +1; Denmark flat



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?

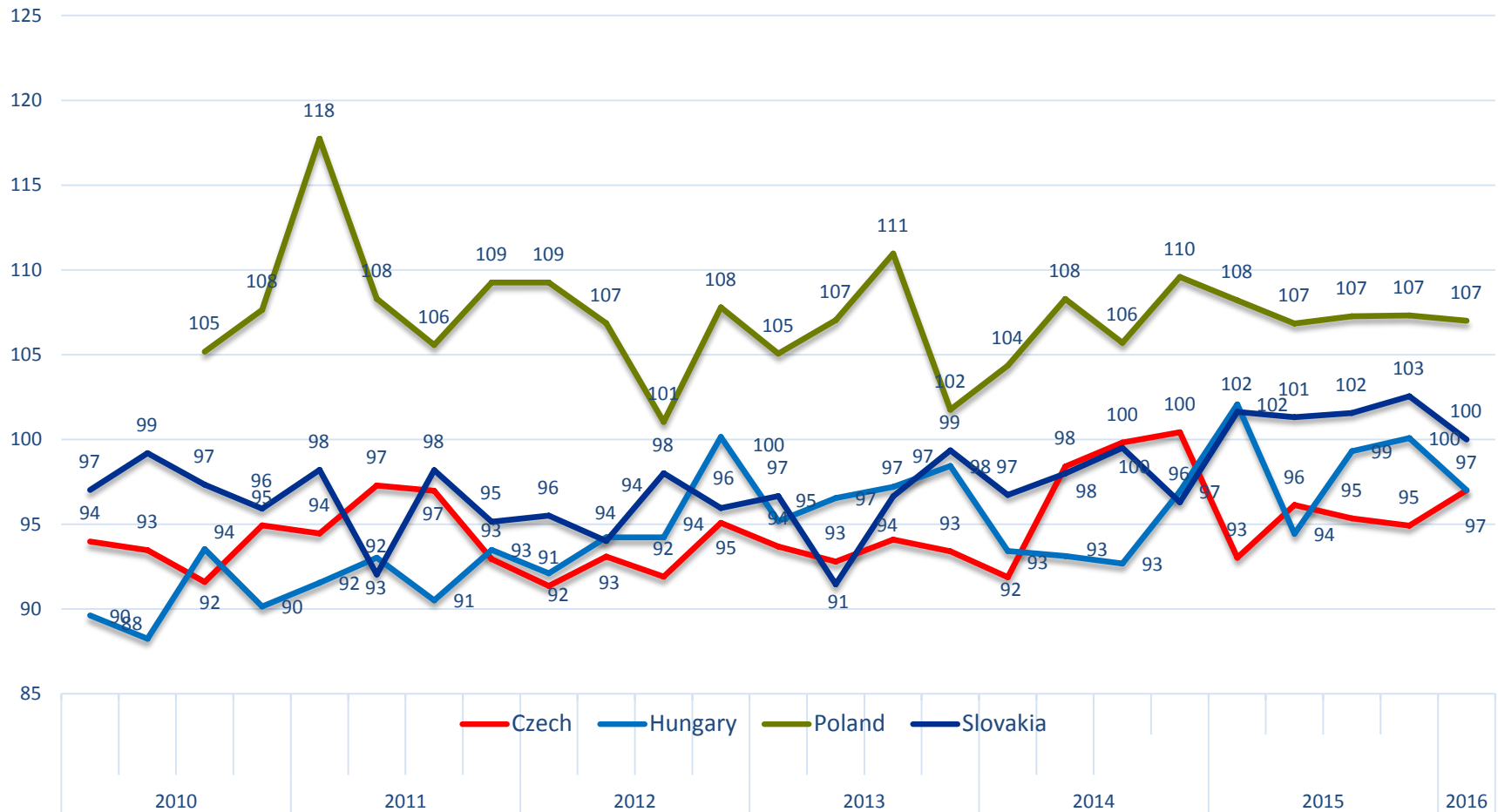
mobility India +3; Japan +2; China & Singapore +1; Hong Kong -4; Malaysia -1



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?

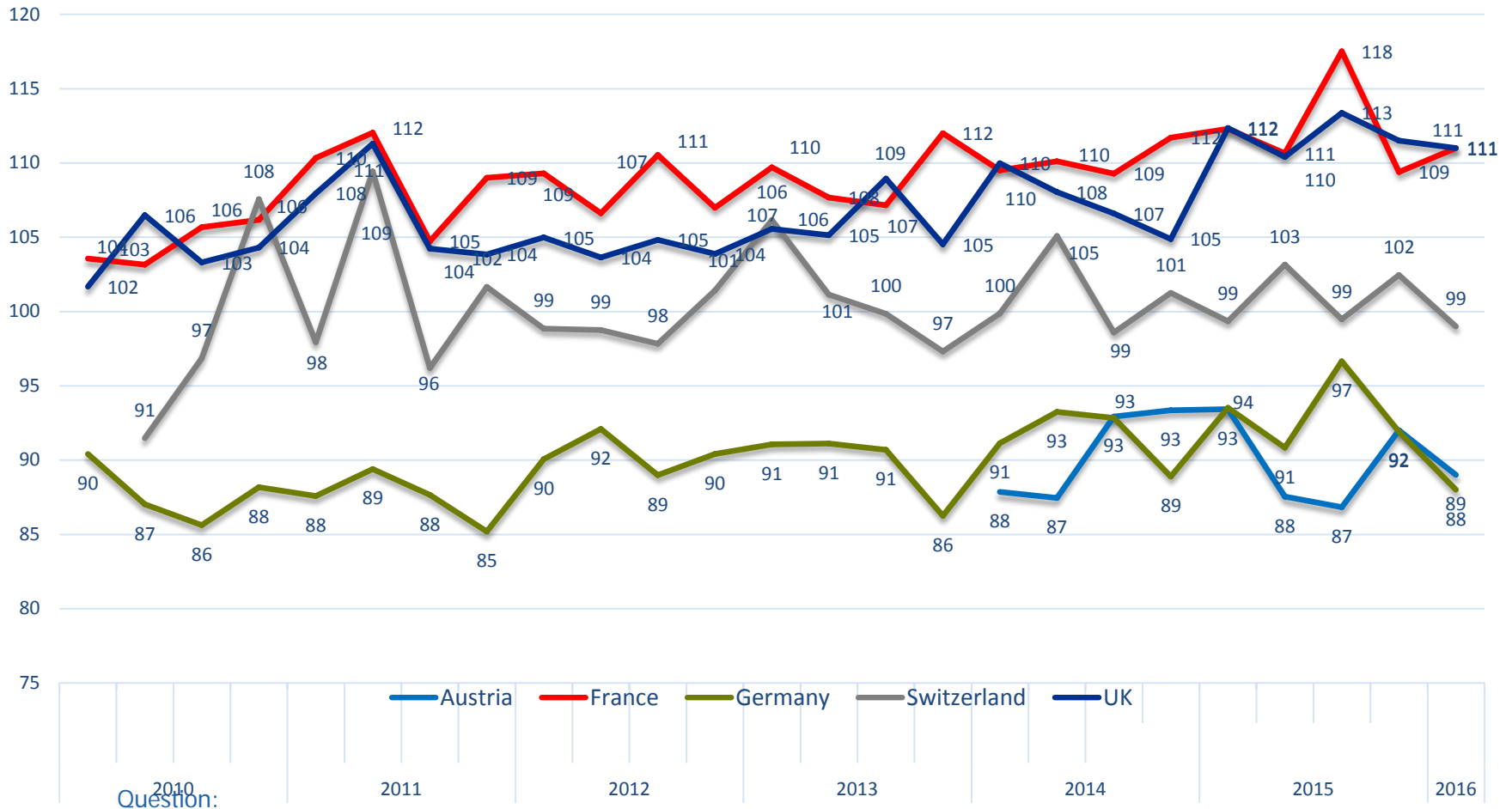
mobility Czech Republic +2; Hungary & Slovakia -3; Poland flat



Question:

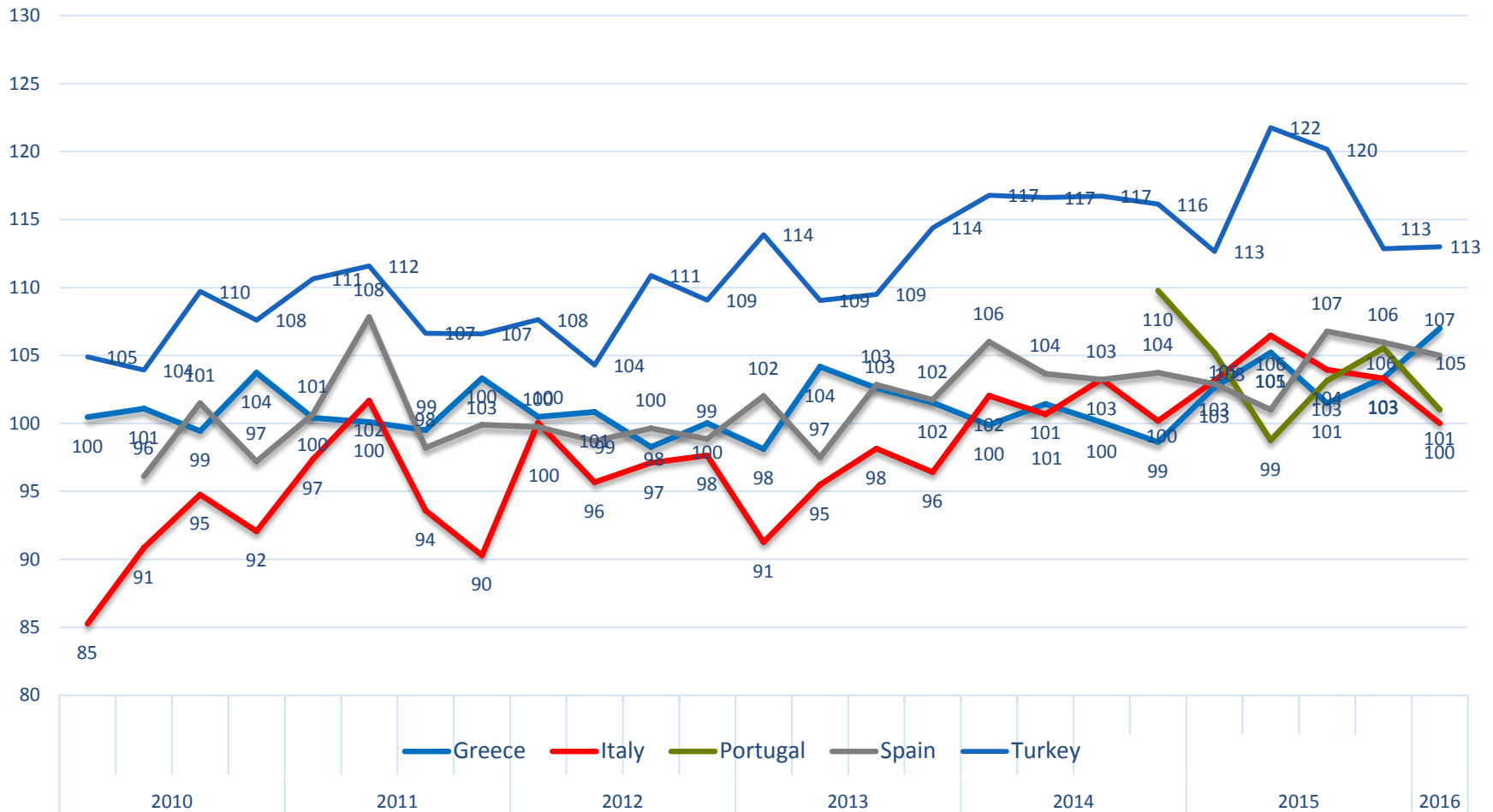
- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
- Do you think you will be doing *different work for a different employer* within the next 6 months?

mobility France +2; Germany -4; Switzerland & Austria -3; UK 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 Turkey +5; Greece +4; Portugal -5; Italy -3; Spain -1

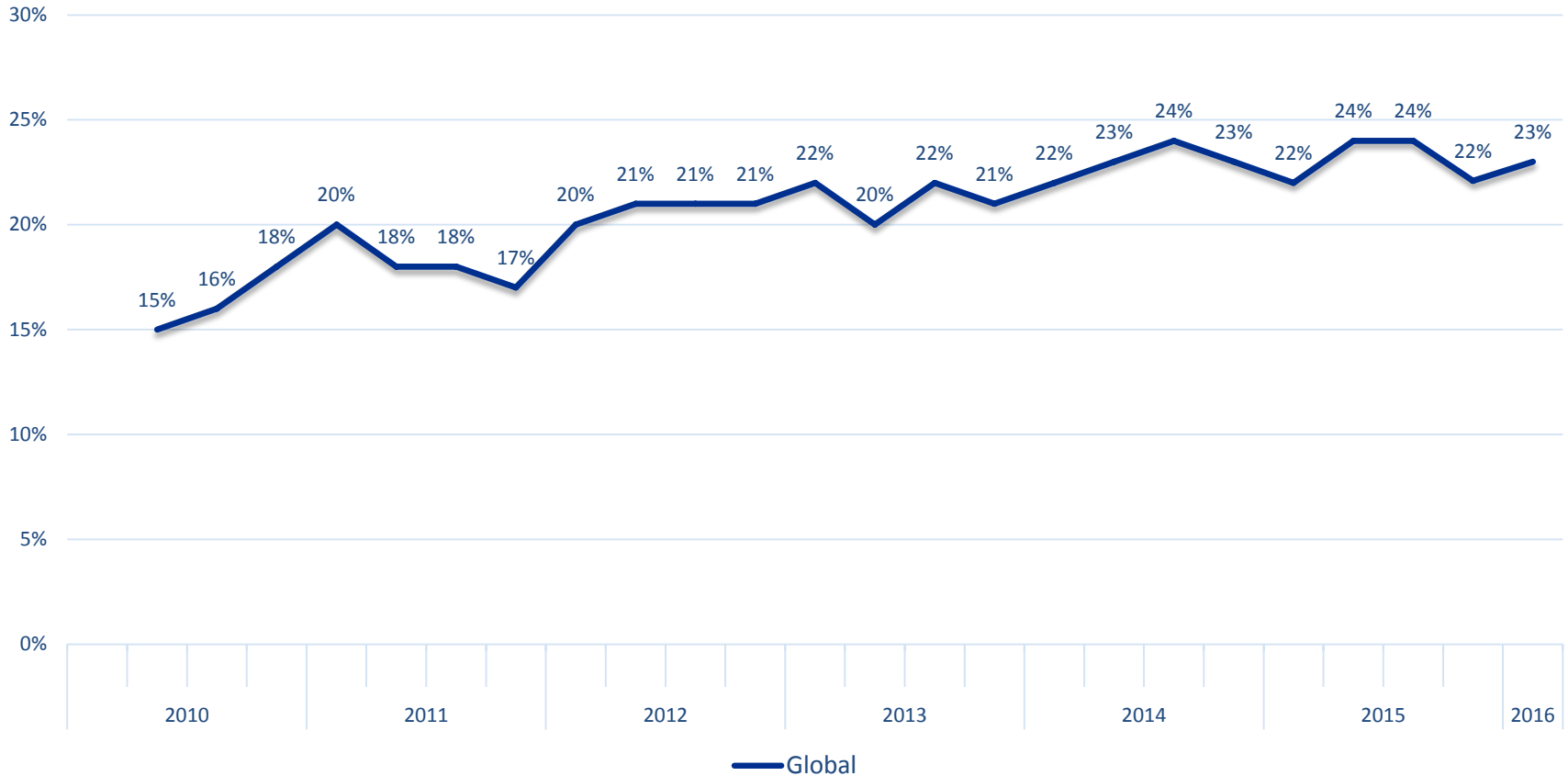


Question:

- 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?

ACTUAL JOB CHANGE

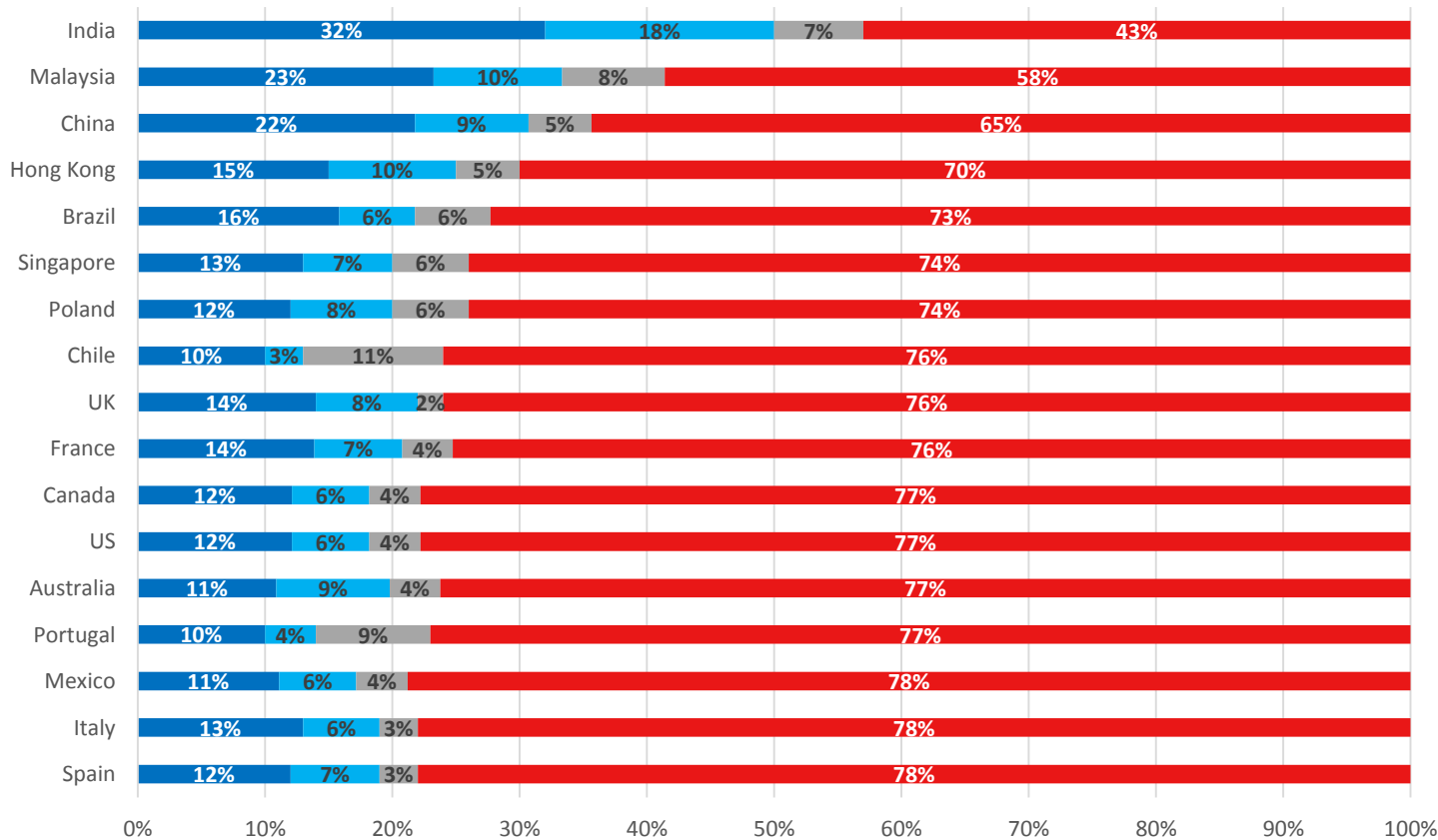
actual job change slightly increased compared to last quarter (+1%)



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, Malaysia and China



Job change increased in Portugal, India and Hungary.

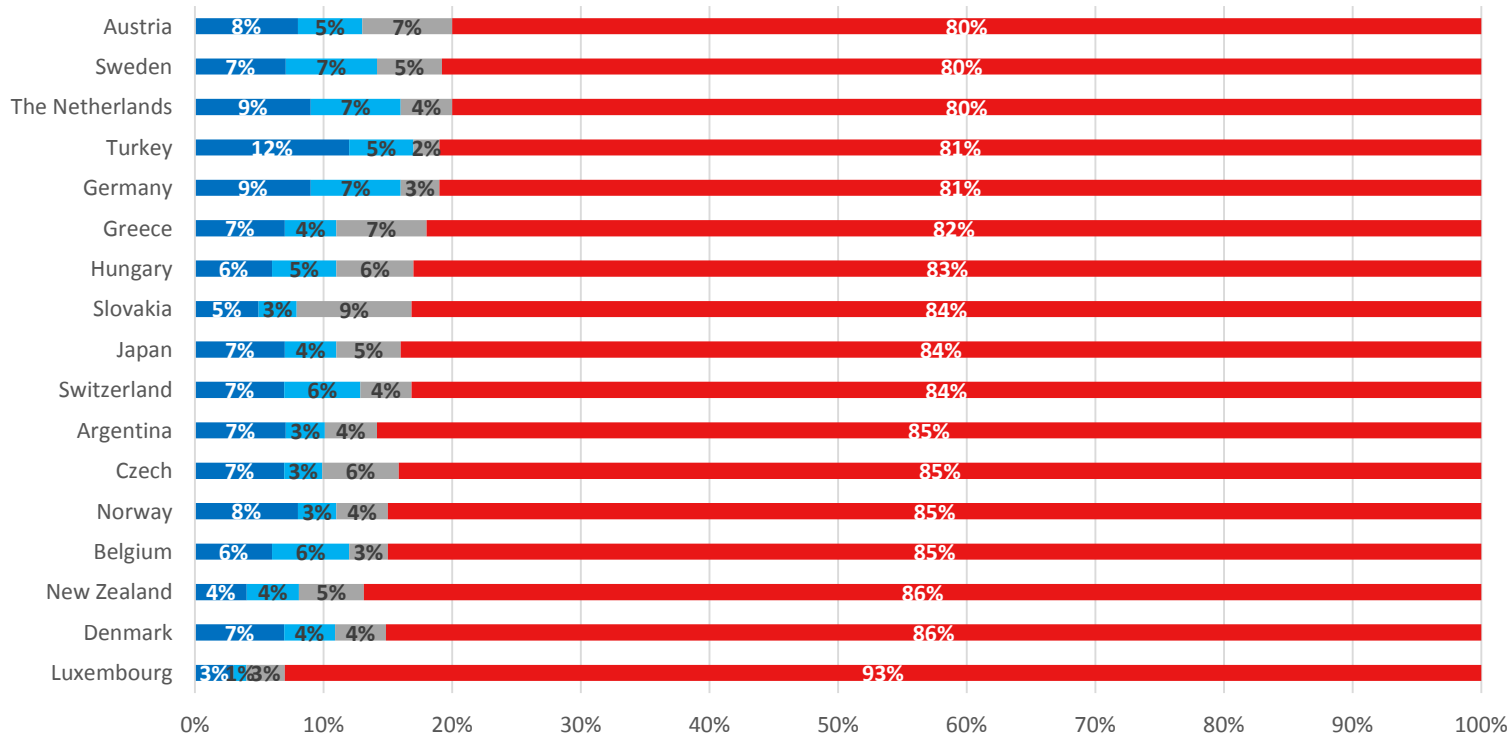
In Belgium, Brazil, Denmark, Japan, New Zealand, Norway, Singapore, Switzerland and the US the job change decreased compared to last quarter.

- 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

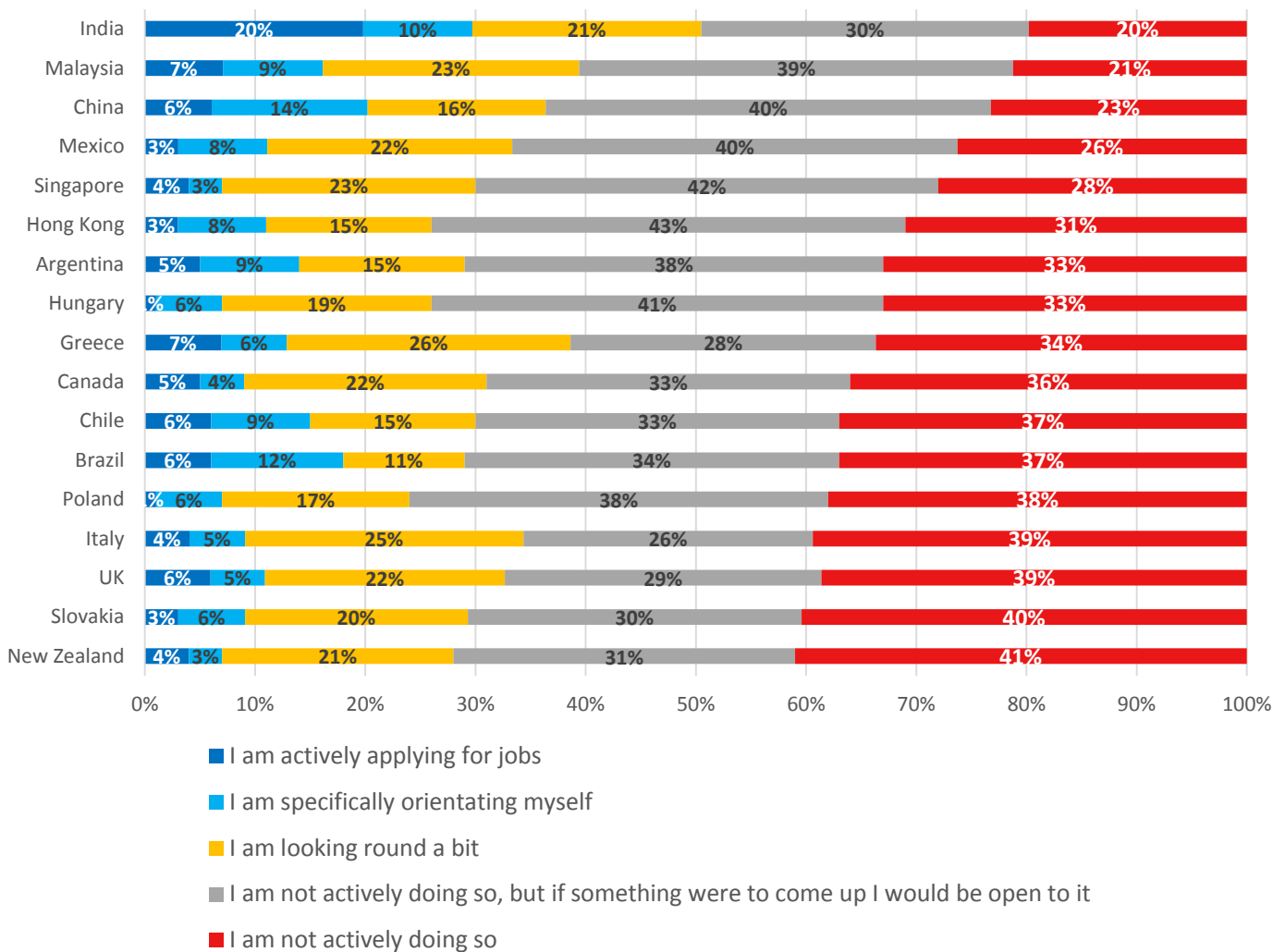


- Yes, I currently work in a comparable position at another employer
- Yes, I currently work in a different position at the same employer
- Yes, I currently work in a different position at a different employer
- No, I did not change positions or employers during the past 6 months

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

JOB CHANGE APPETITE

India highest appetite for job change



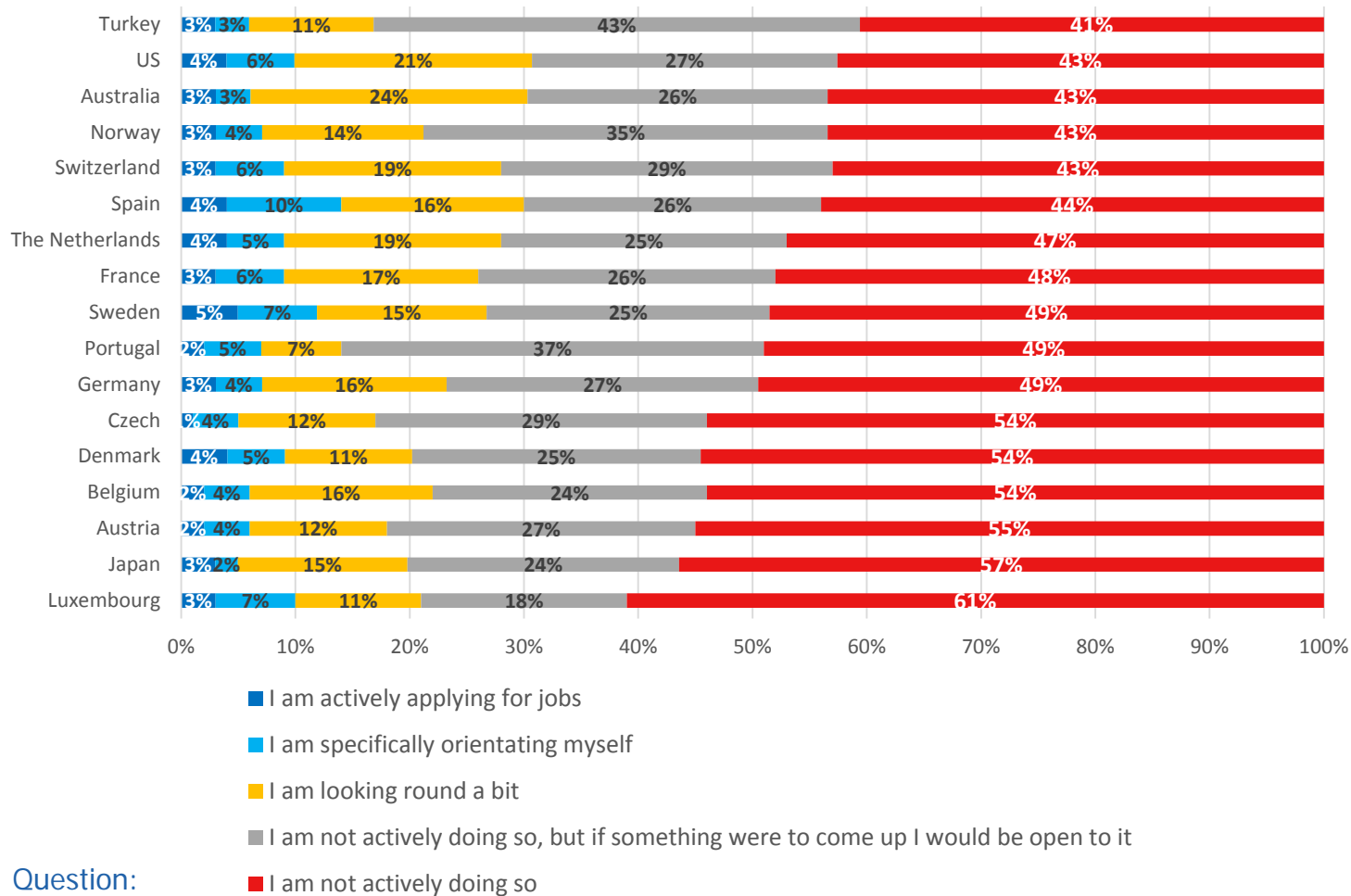
Compared to last quarter, the job appetite increased in India, Luxembourg, Malaysia and New Zealand.

Australia, Denmark, Germany, Norway, Poland, Portugal, Singapore, Switzerland, Turkey and the US 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

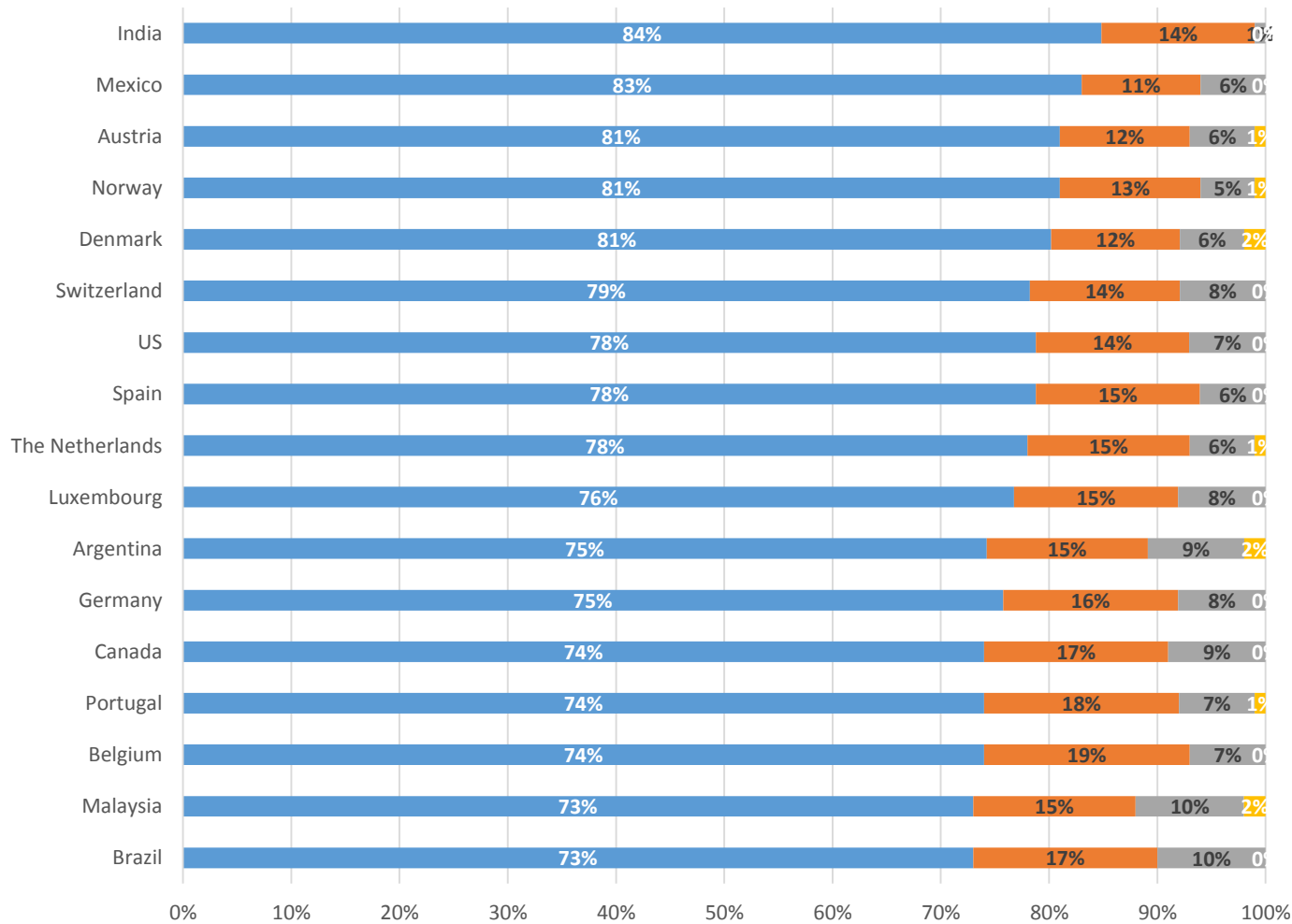


Question:

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

JOB SATISFACTION

job satisfaction is highest in India



Job satisfaction increased in Argentina, Austria, Denmark, Germany, Greece, Hungary, India, Japan, Portugal, Singapore, Slovakia and Switzerland.

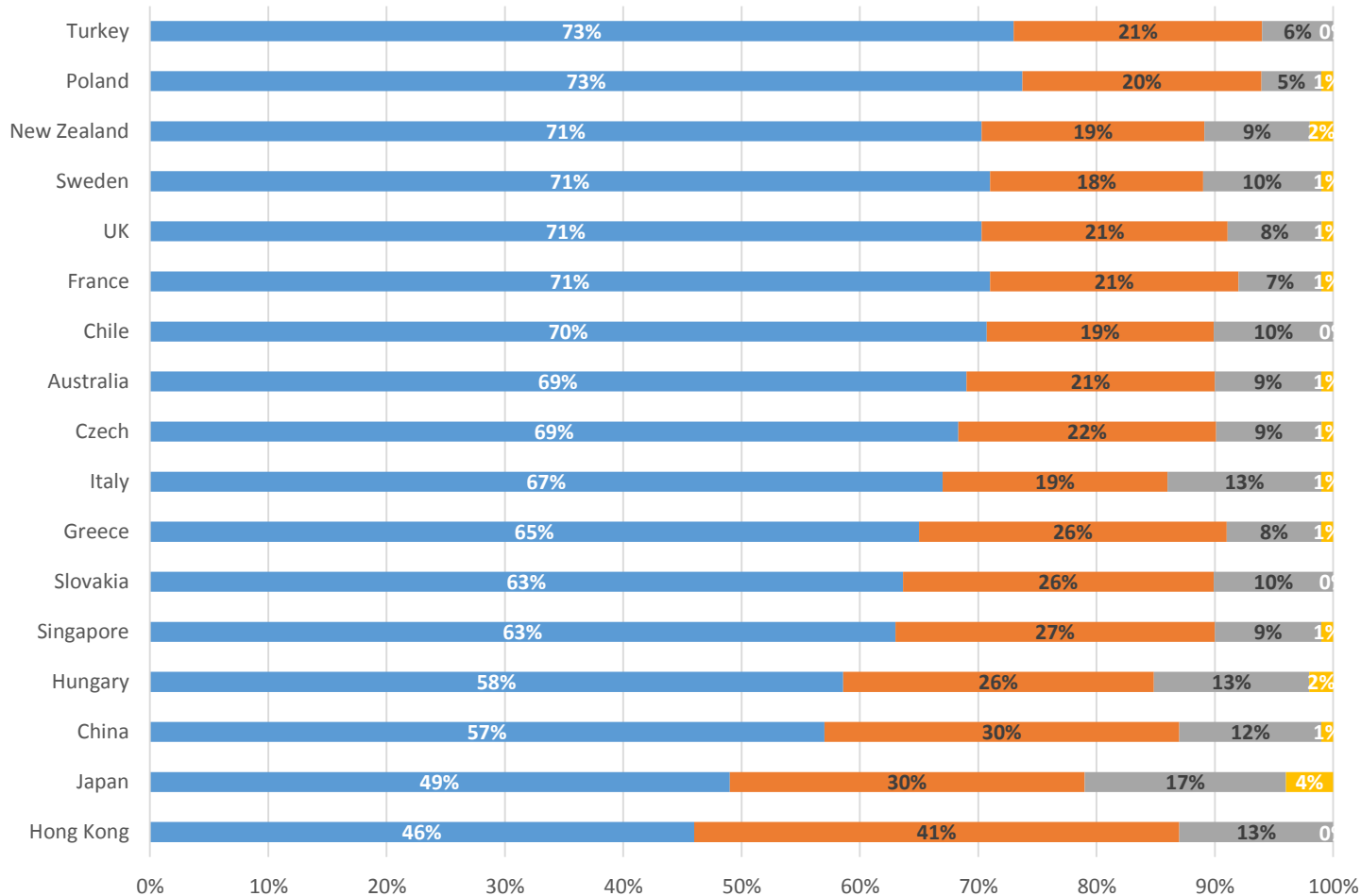
Job satisfaction decreased in China.

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 Hong Kong and 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 first survey of 2016 was conducted from 13-29 January 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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