

global report Randstad Workmonitor 1st quarter 2017
being an entrepreneur is considered attractive,
but actually becoming one, seems a step too far
incl. quarterly mobility, job change and job satisfaction

Group Communications
Randstad Holding nv
March 2017

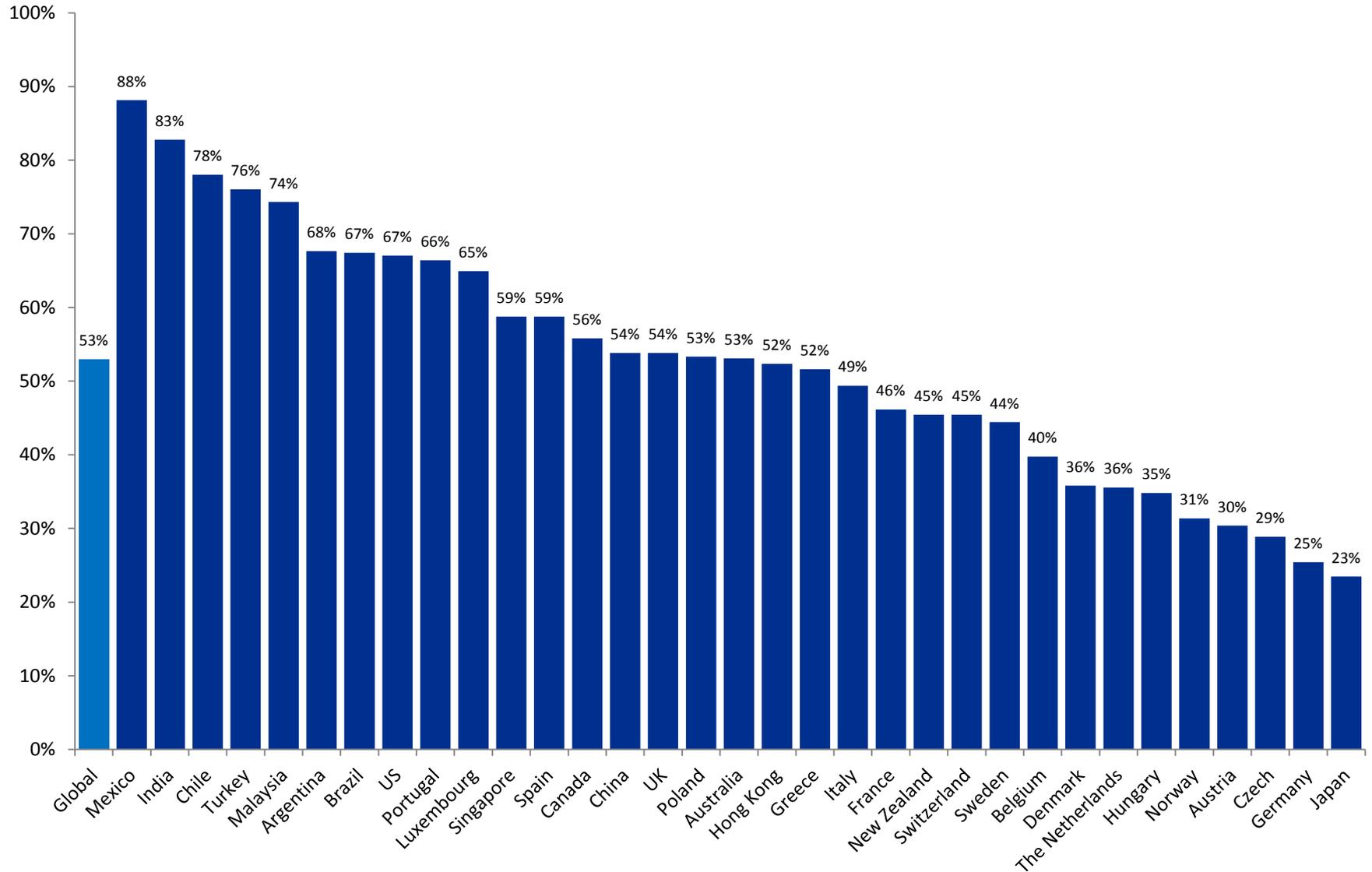


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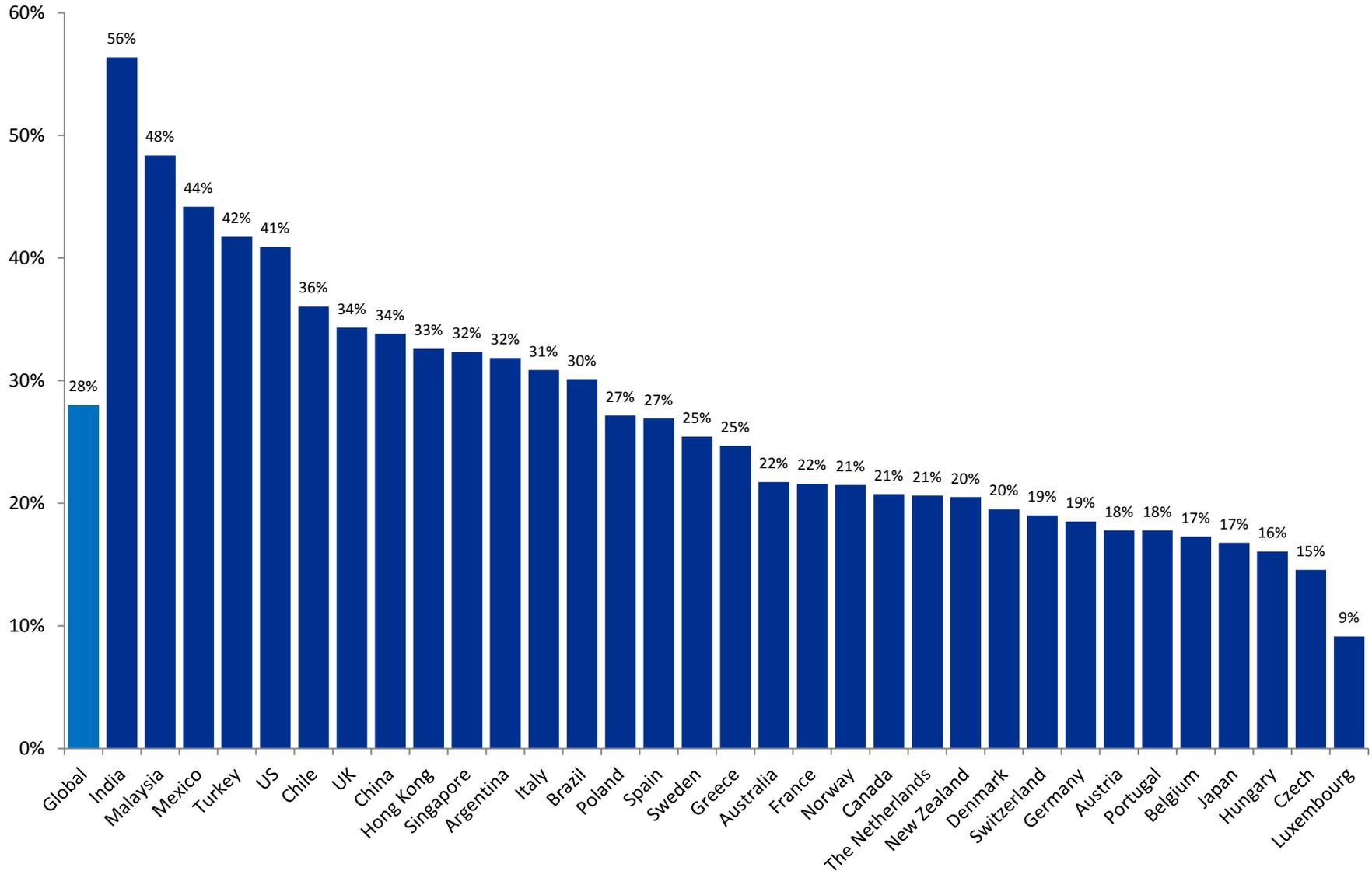
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outlook on entrepreneurship

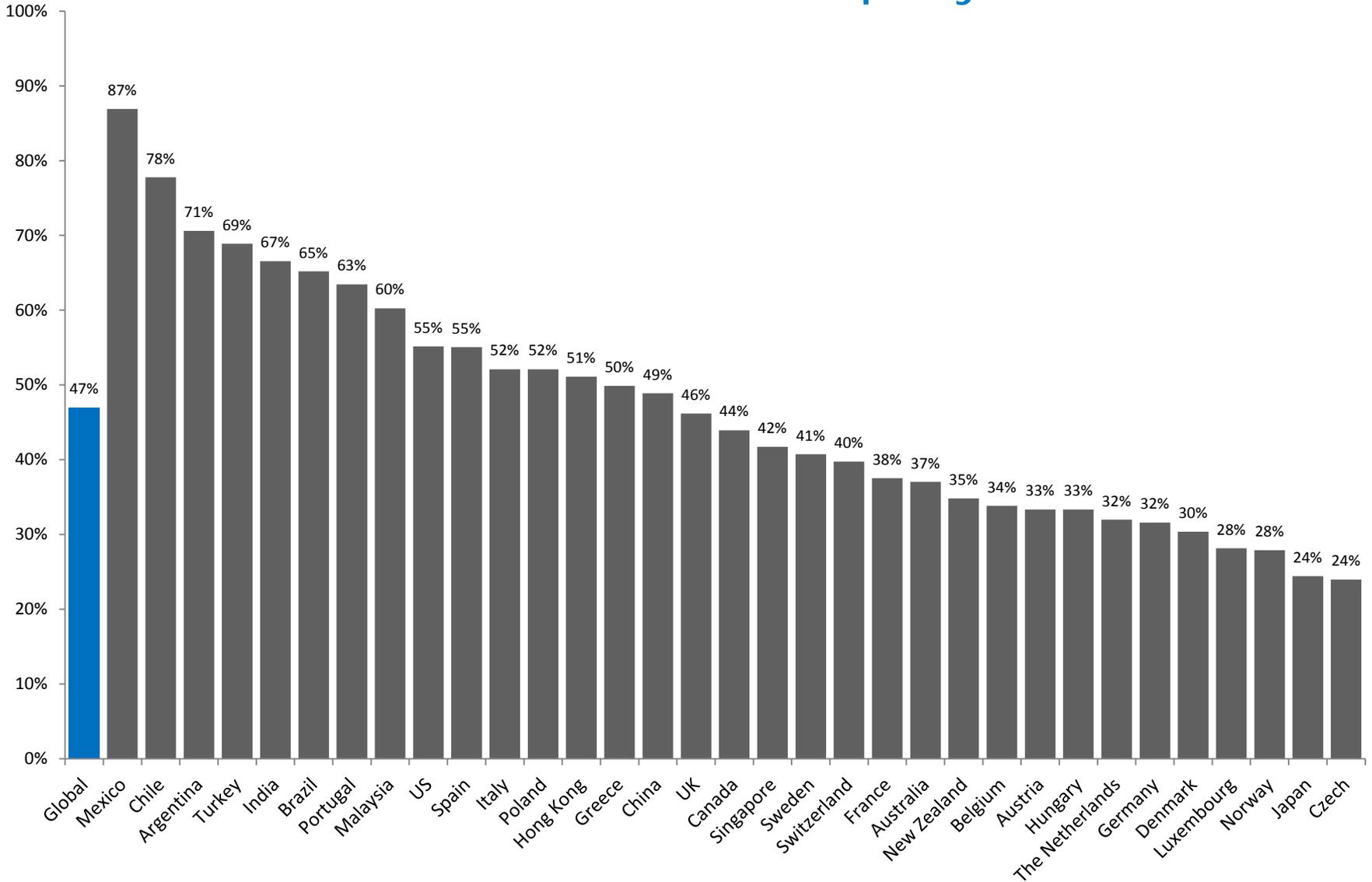
53% would love to be an entrepreneur, because it gives them more opportunities



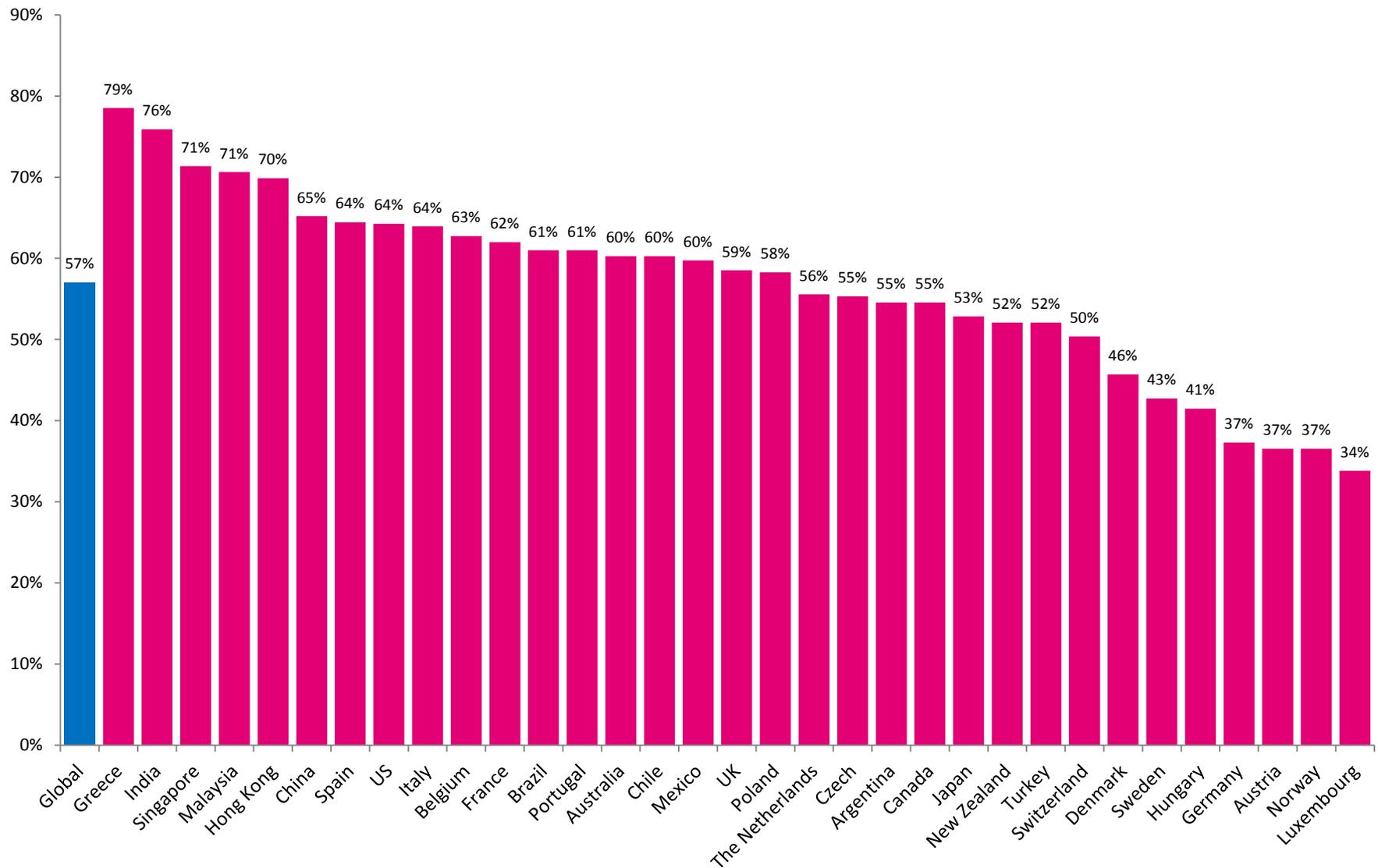
28% is considering leaving their current job and start their own business



47% state that if they lost their current job, they would like to start their own company

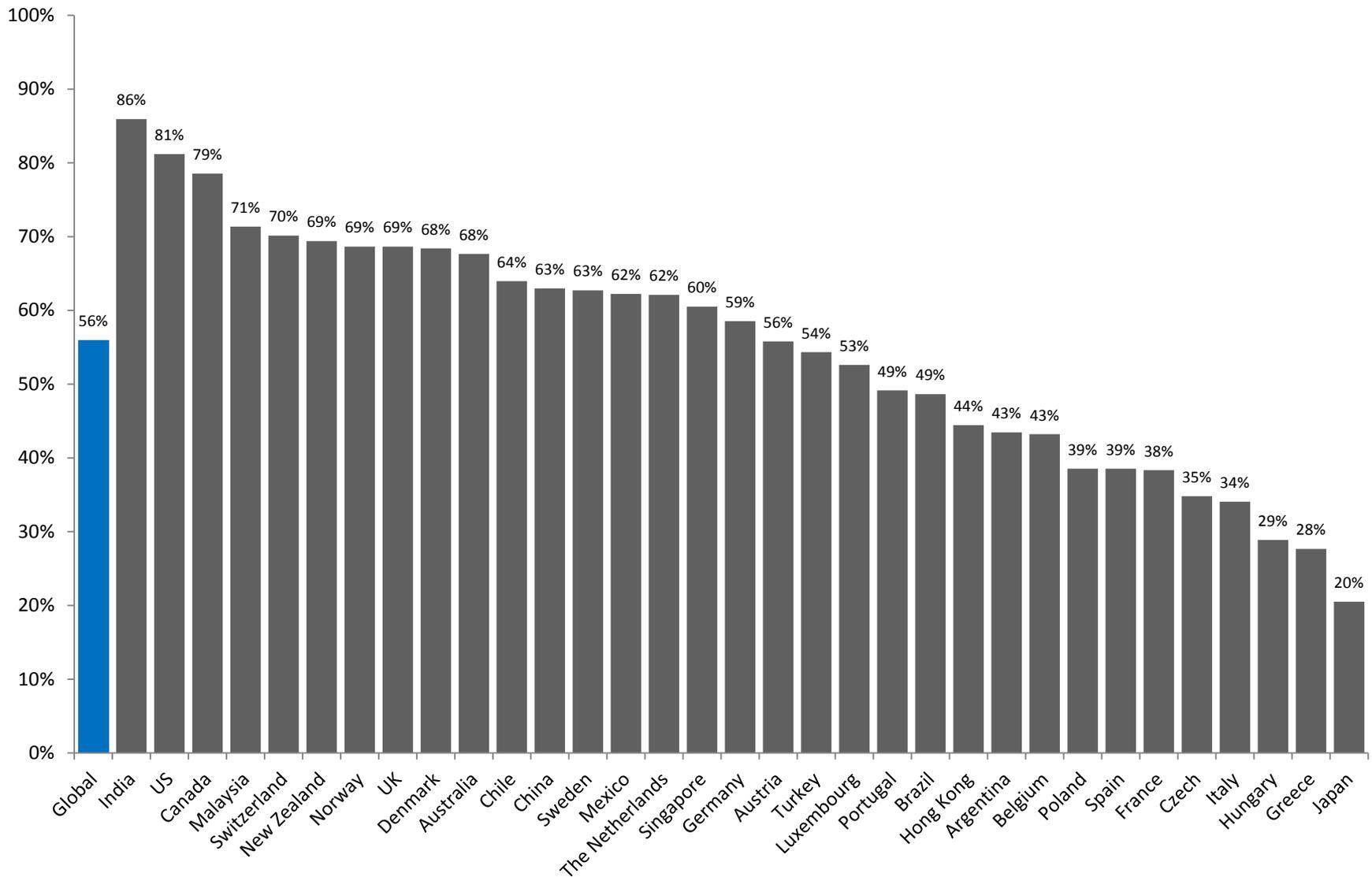


57% would love to be an entrepreneur, but to them the risk of failure is too big

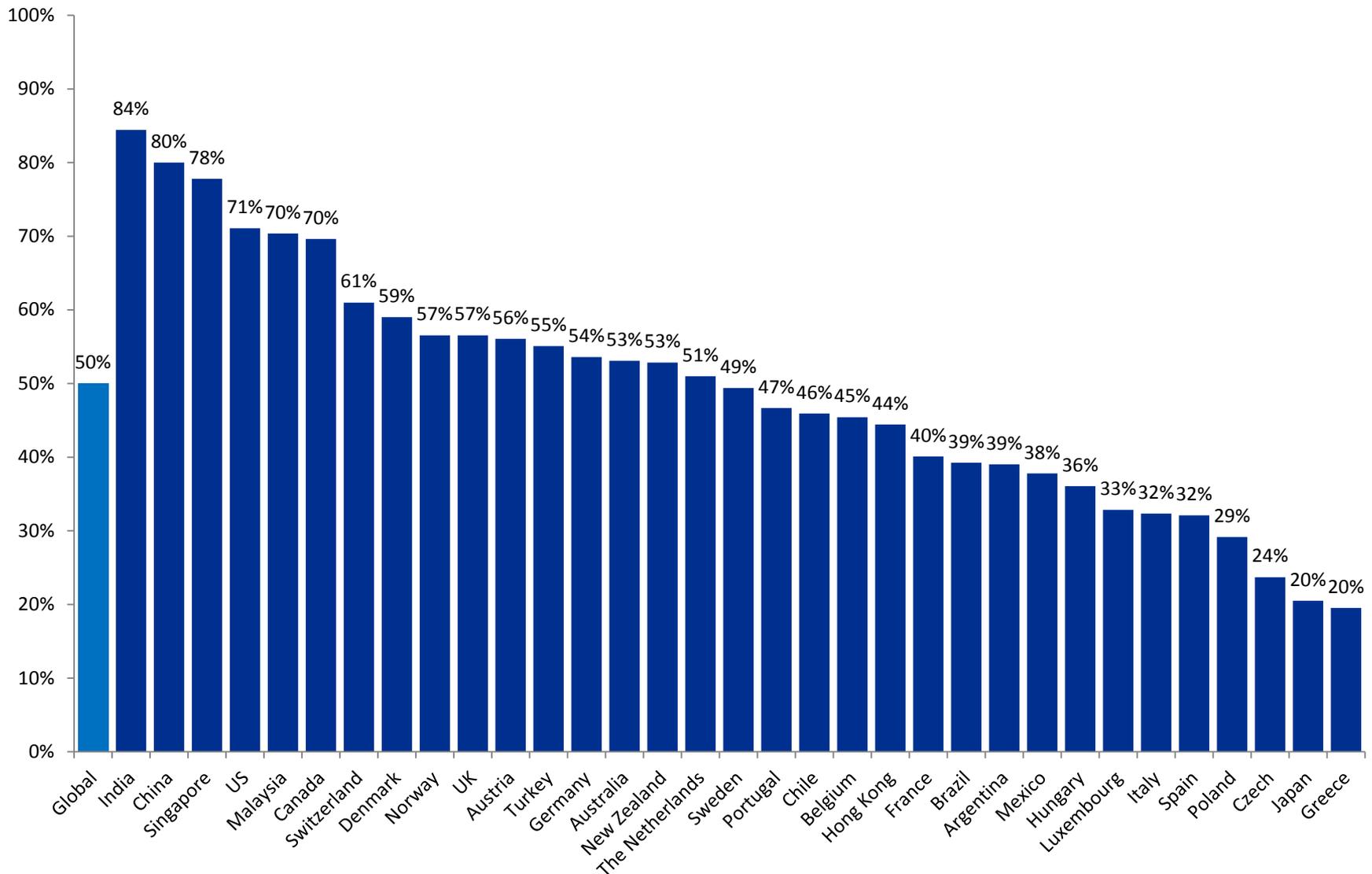


outlook on startups, small businesses, and multinationals

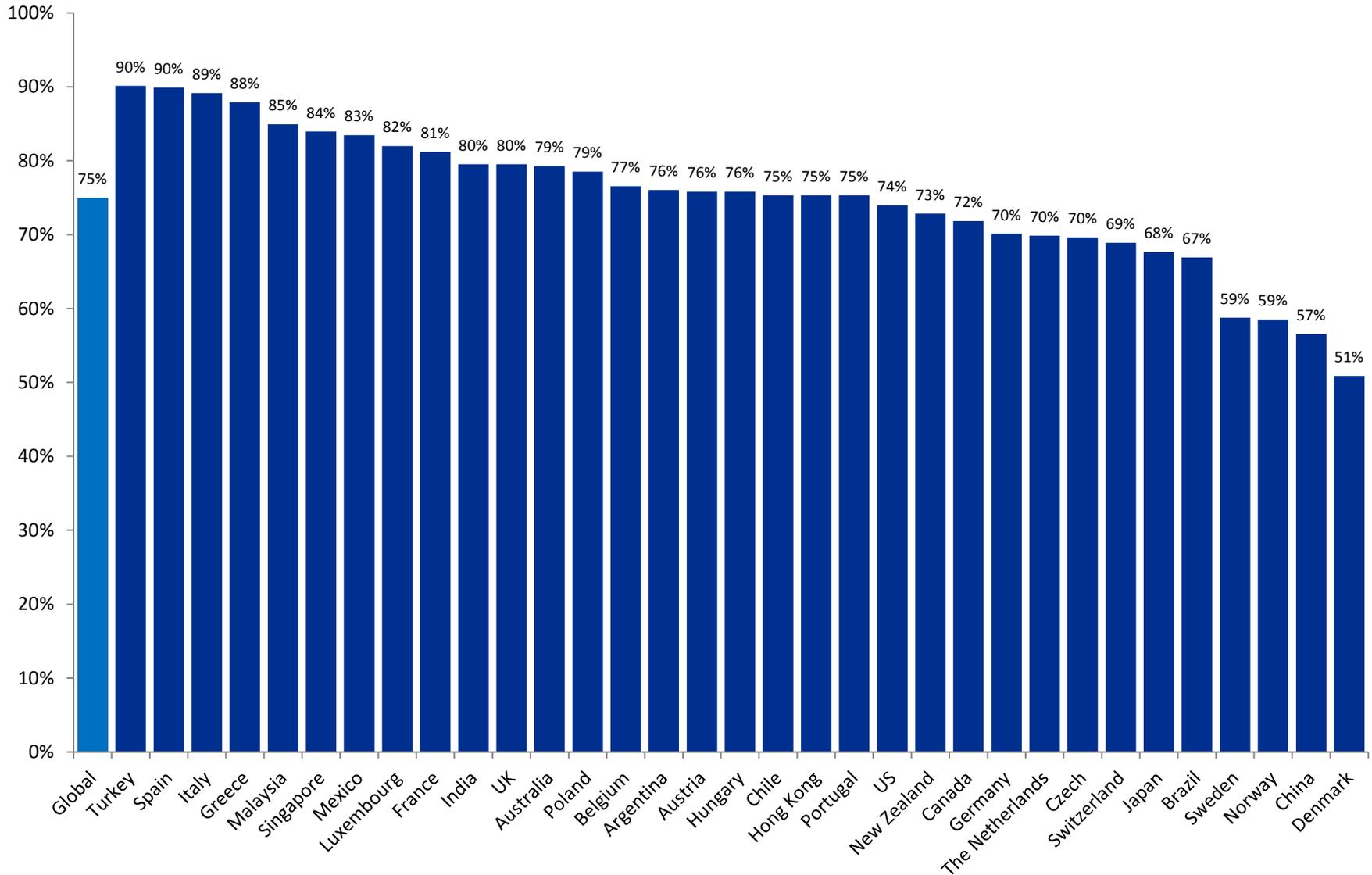
56% feel the country they live in is a good place to run a startup



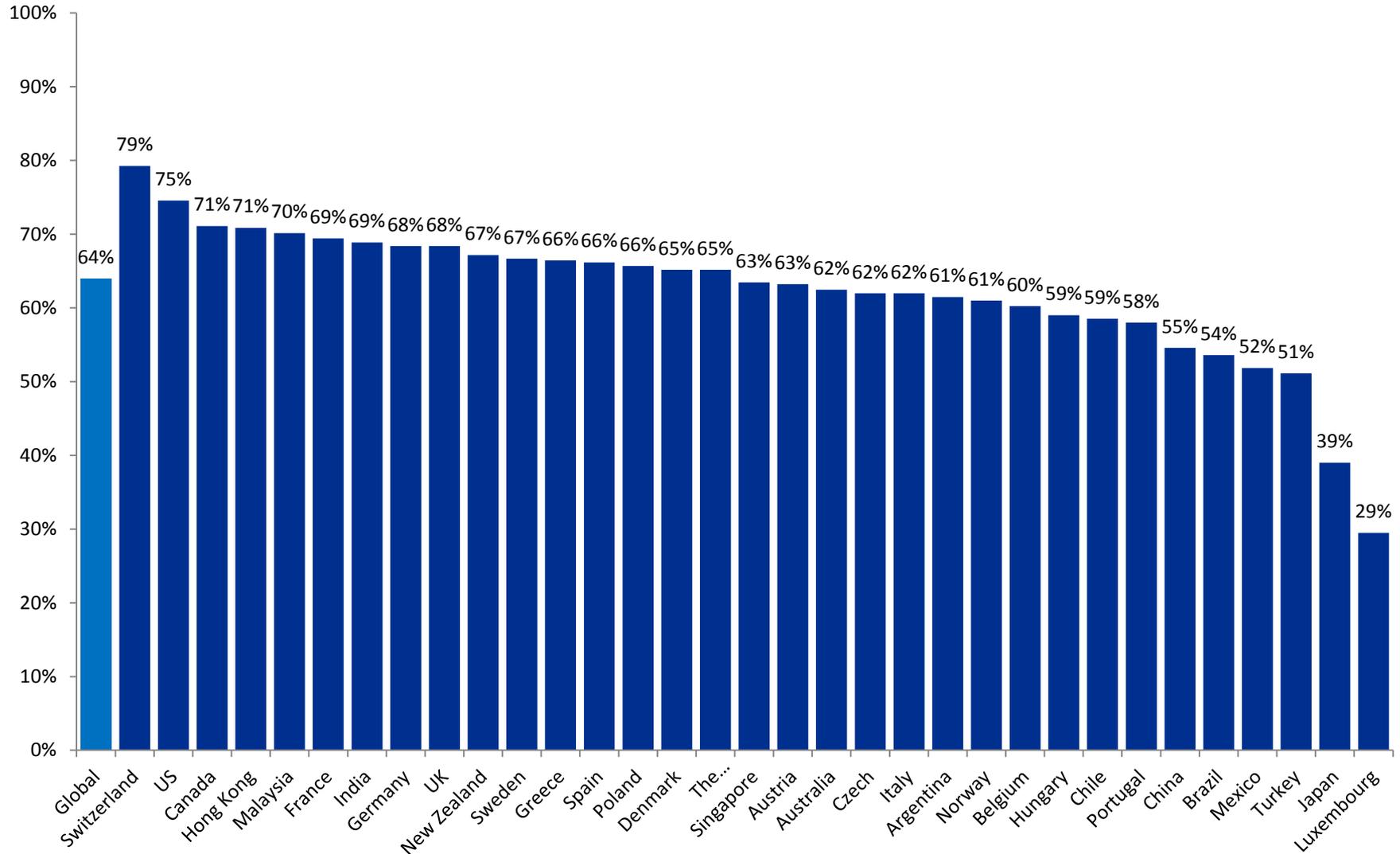
50% believe that the government in their country actively supports new startups



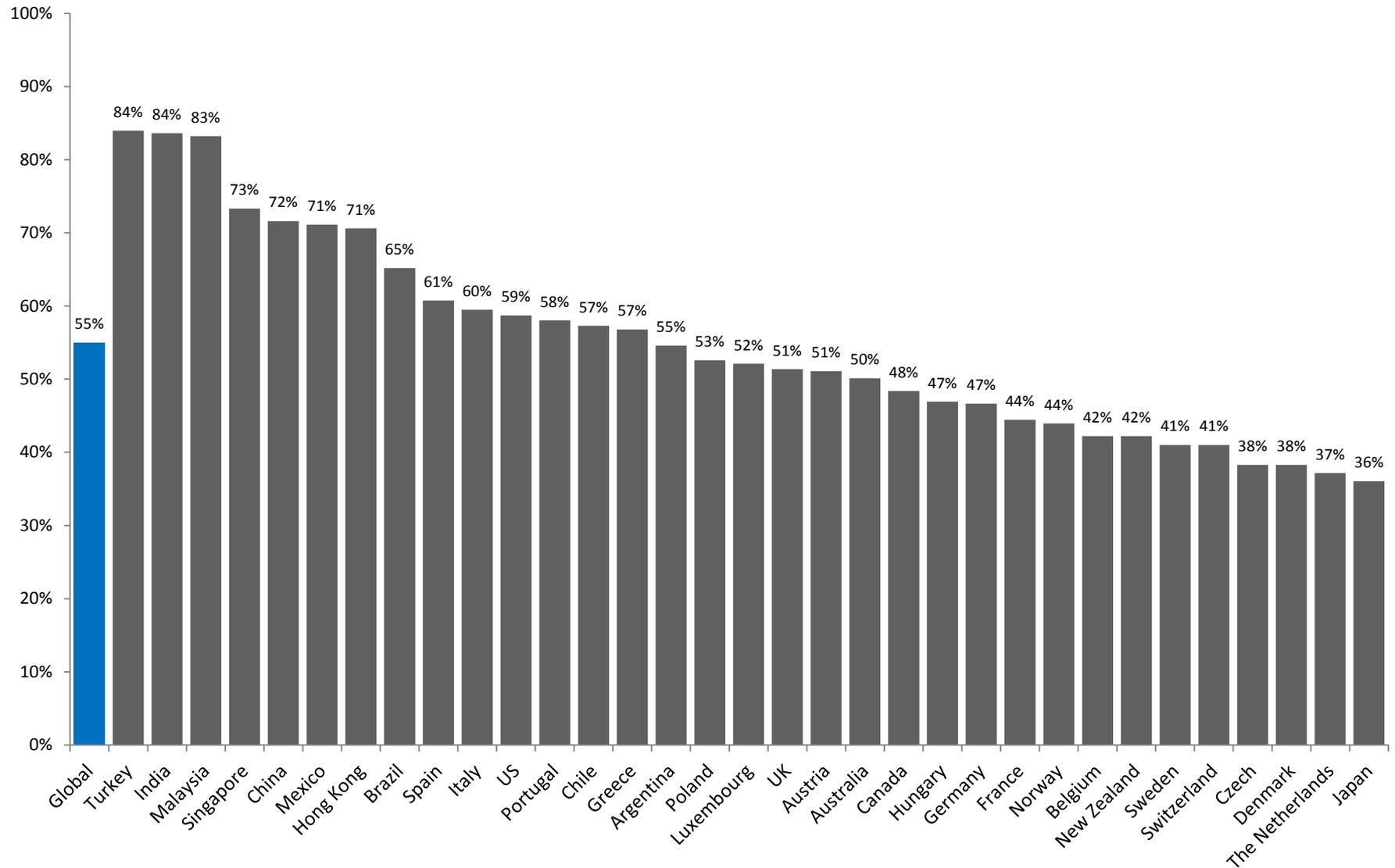
75% agrees that due to globalization, small businesses have a hard time surviving



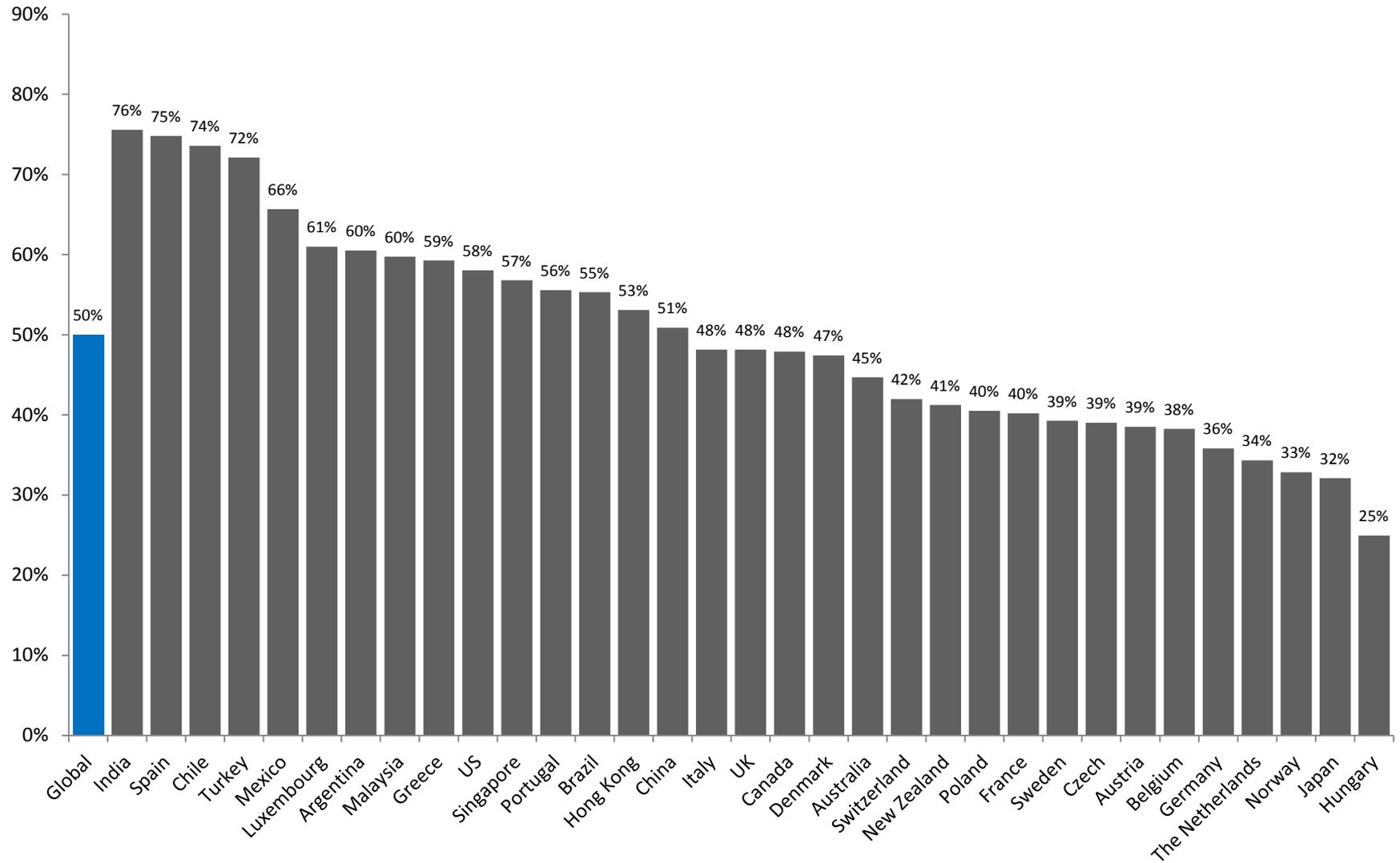
64% prefer to work for a small or medium enterprise or a privately-managed company



55% prefer to work for a multinational company

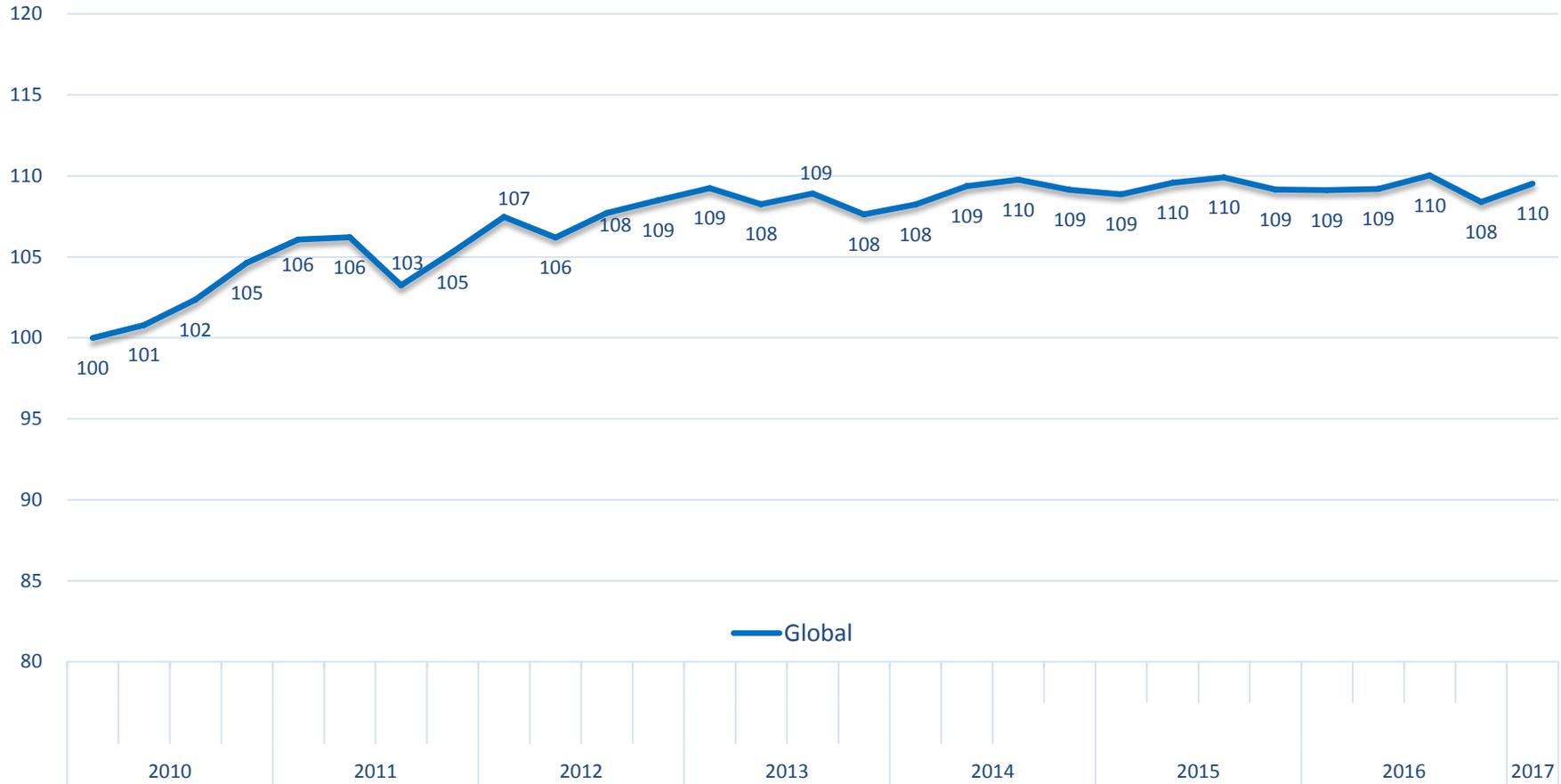


50% state that they would like to work for a start-up



mobility index

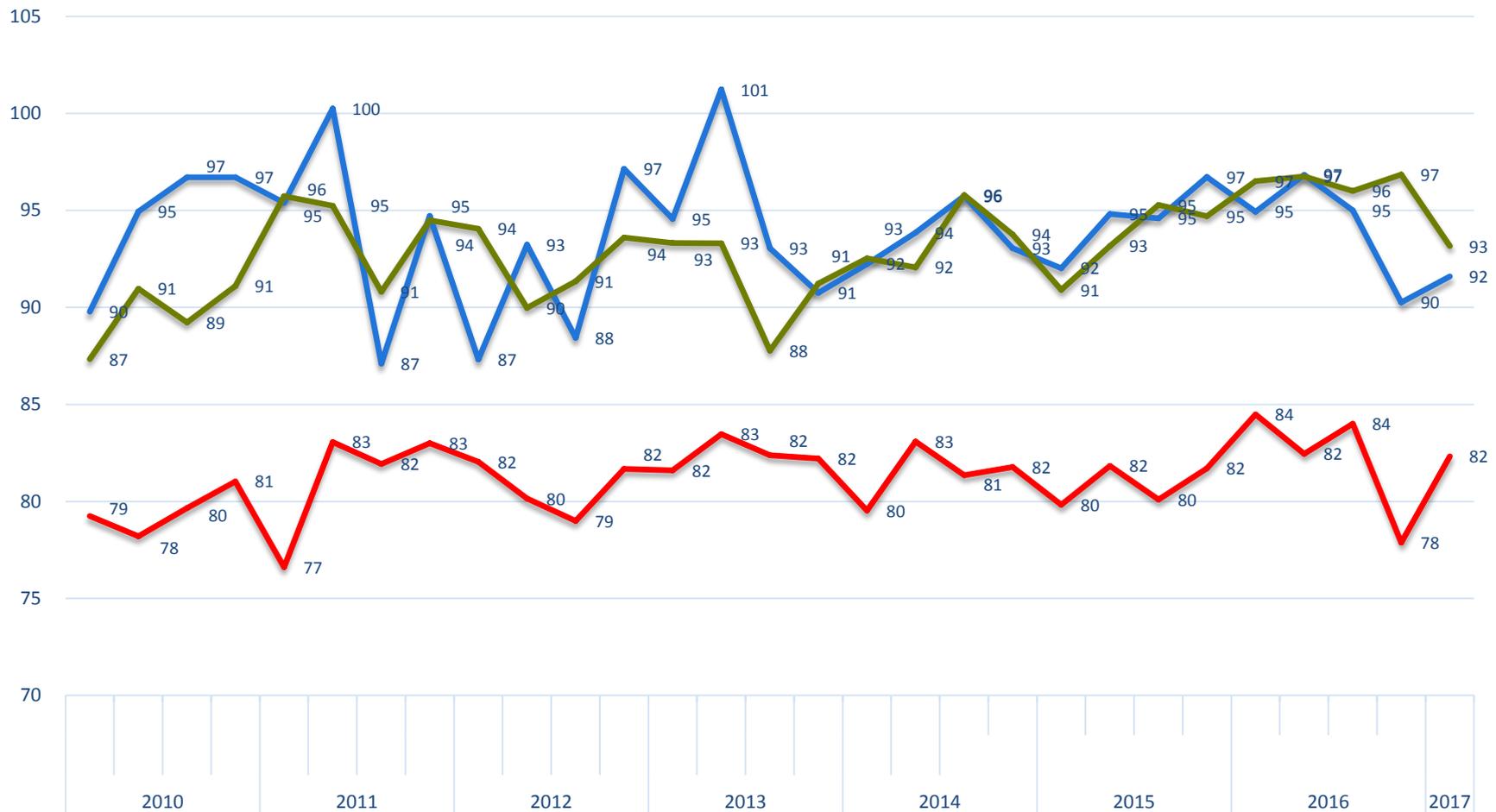
the global Mobility Index increased from 108 to 110 points



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 +4; Belgium +2 and the Netherlands -4

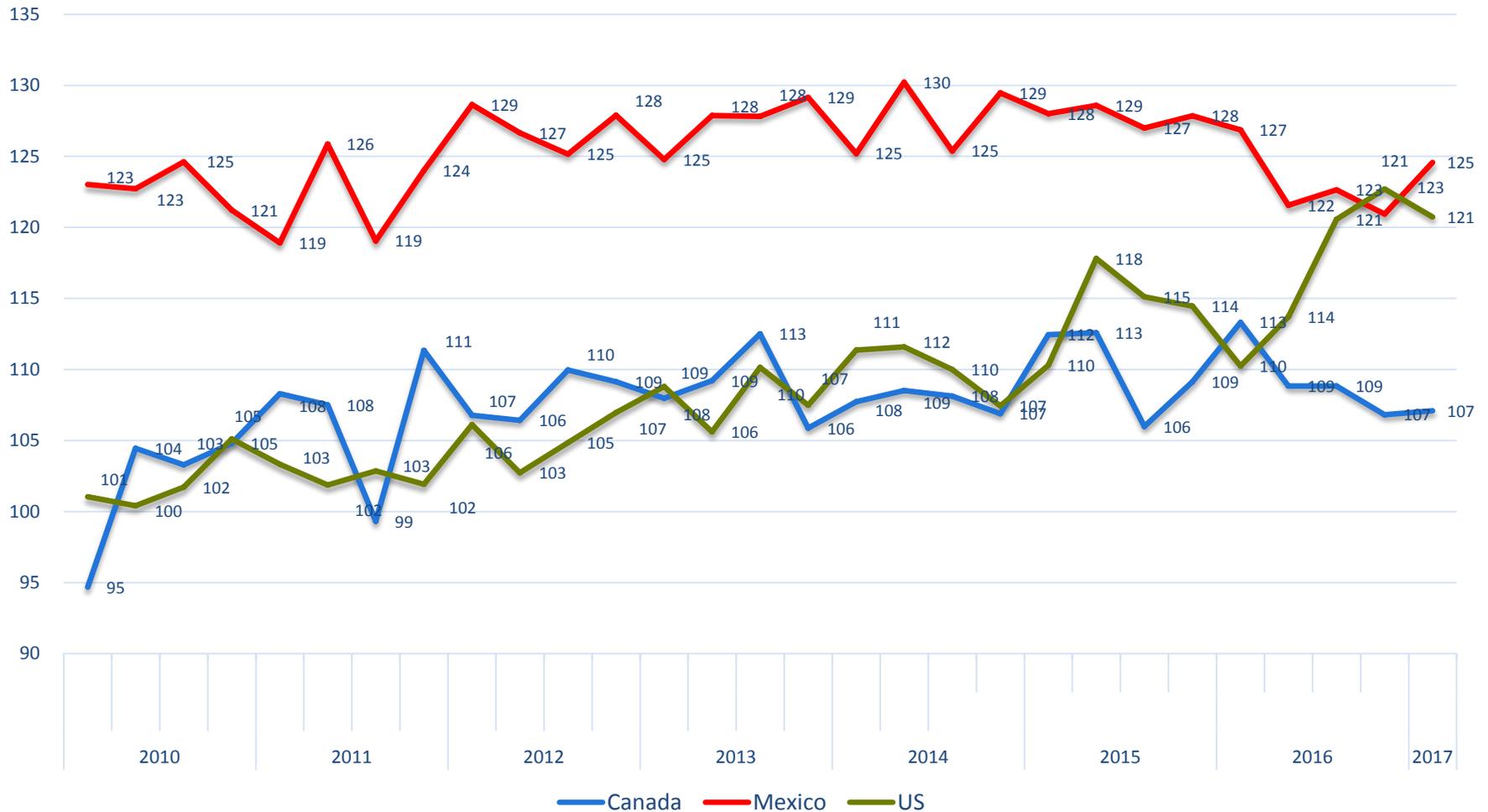


Question:

— 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?

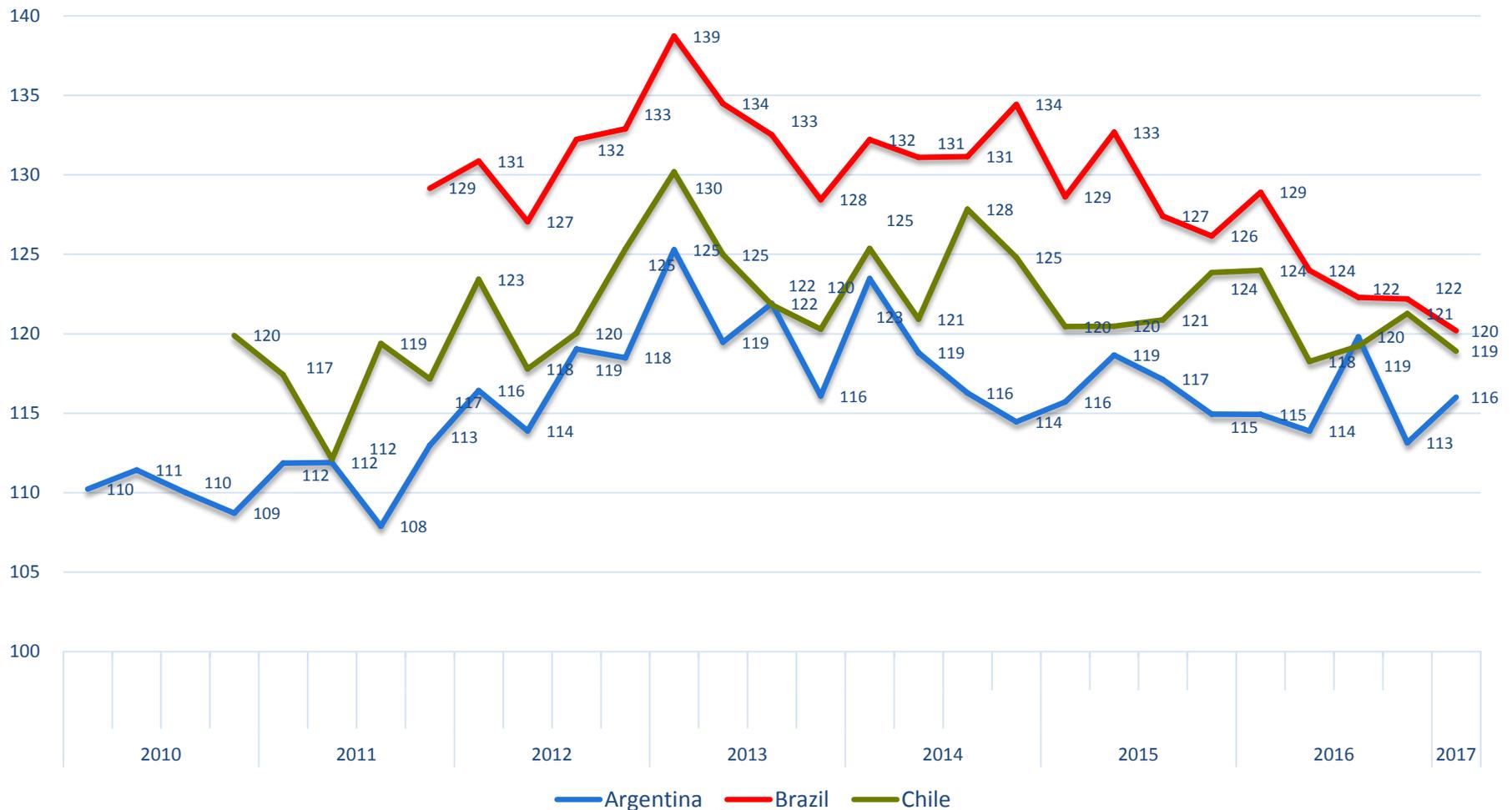
mobility Mexico +4; US -2 and Canada no shift



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?

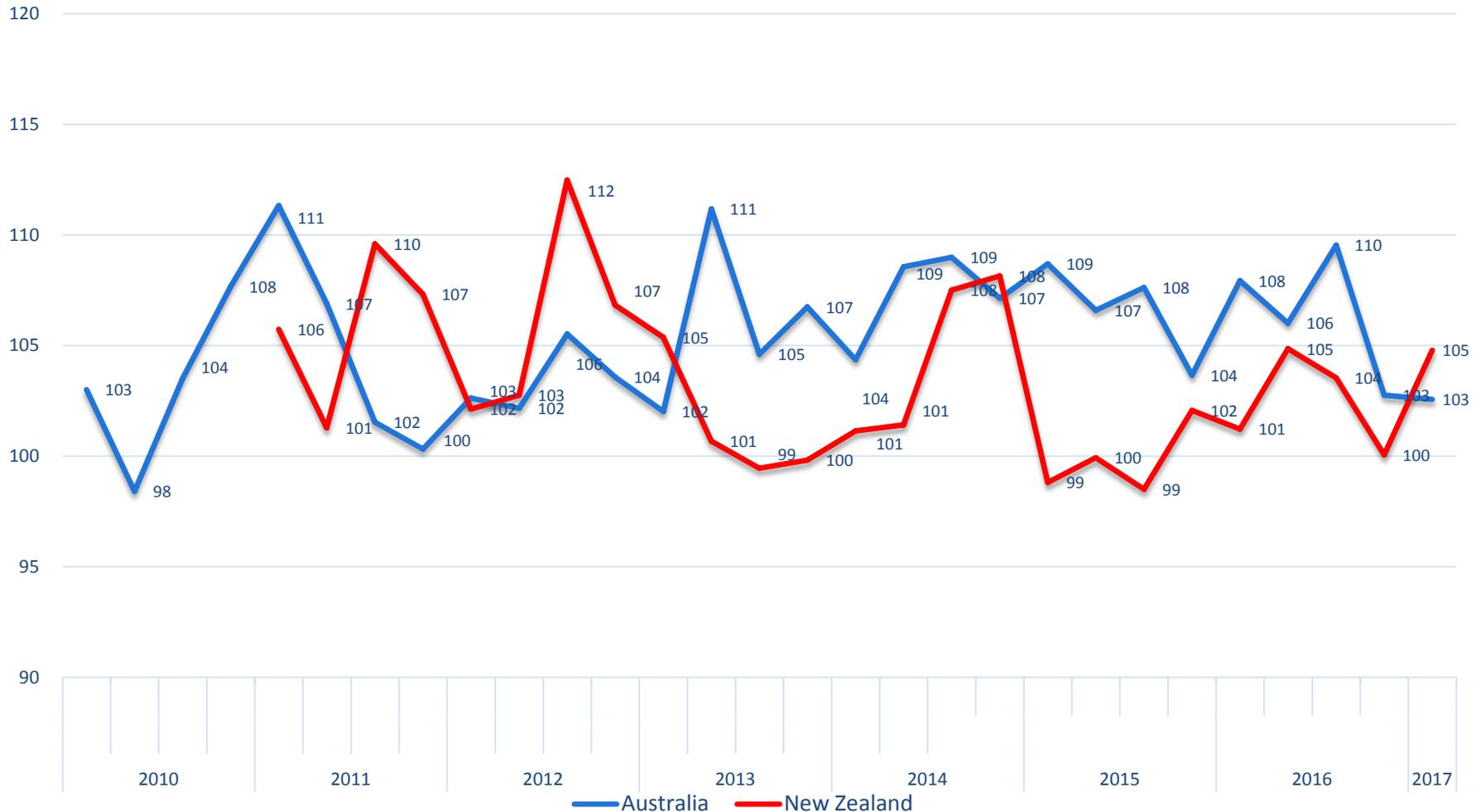
mobility Argentina +3; Chile -2 and Brazil -2



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?

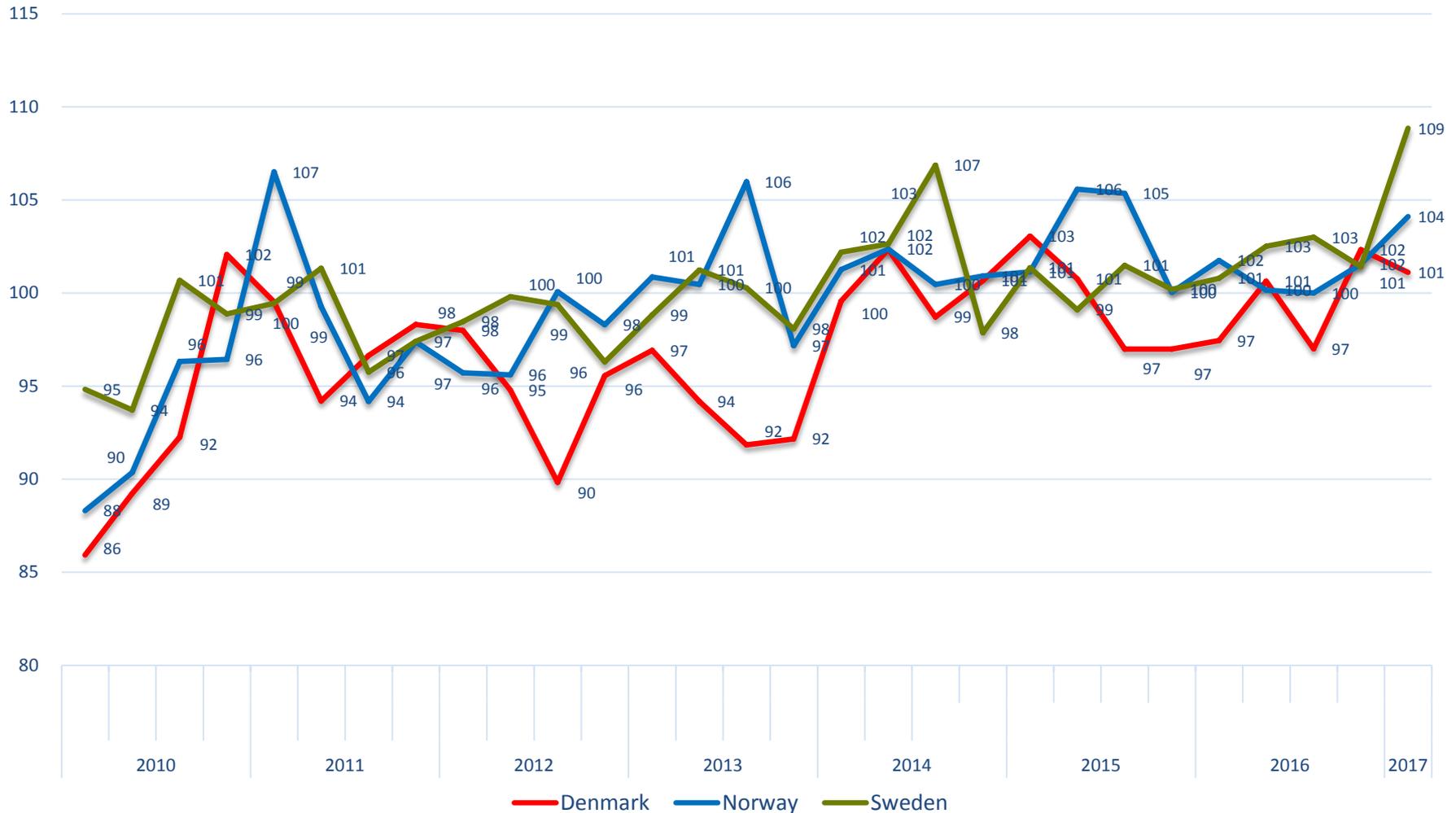
mobility New Zealand +5; Australia no shift



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?

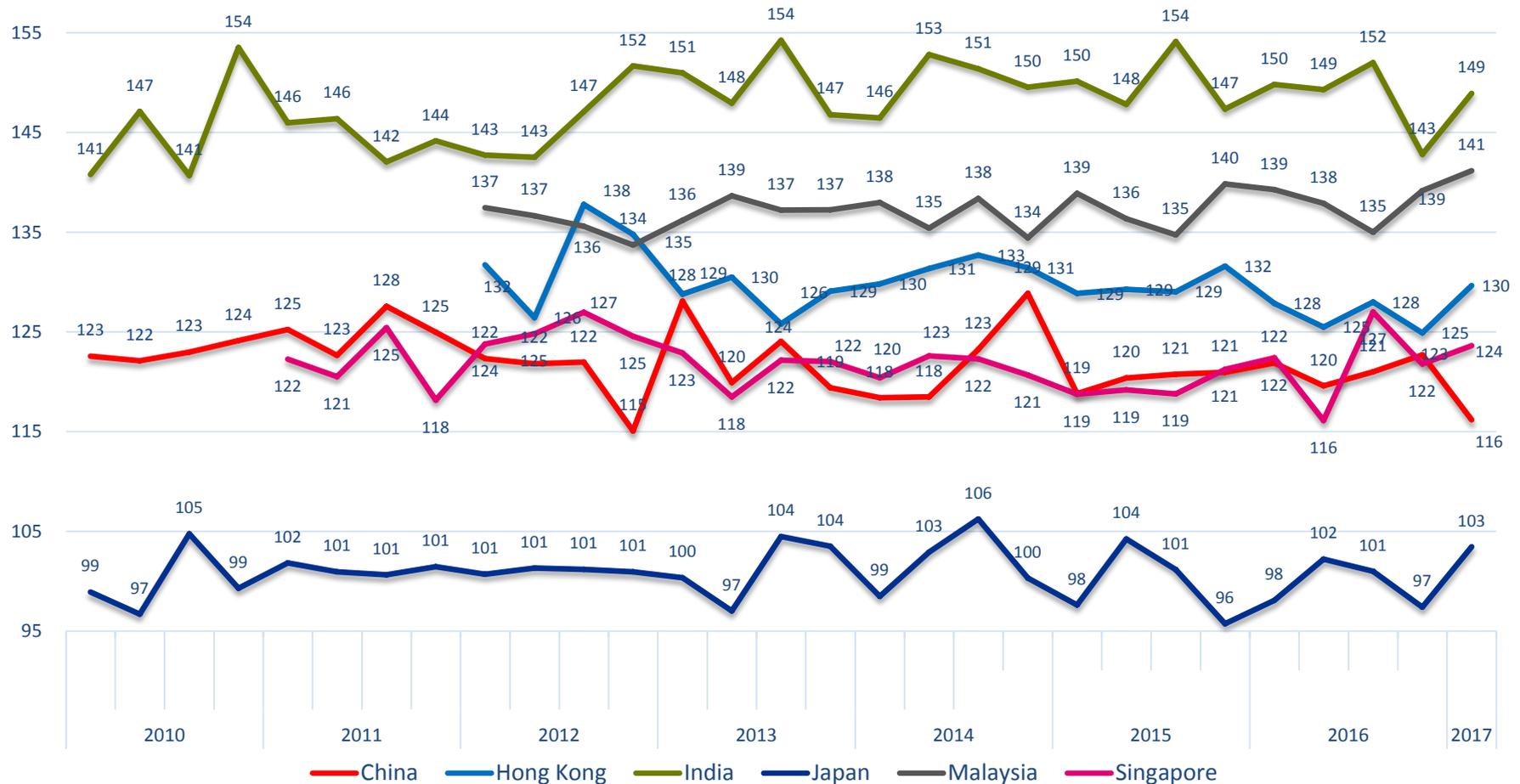
mobility Sweden +8 and Norway +2; Denmark -1



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?

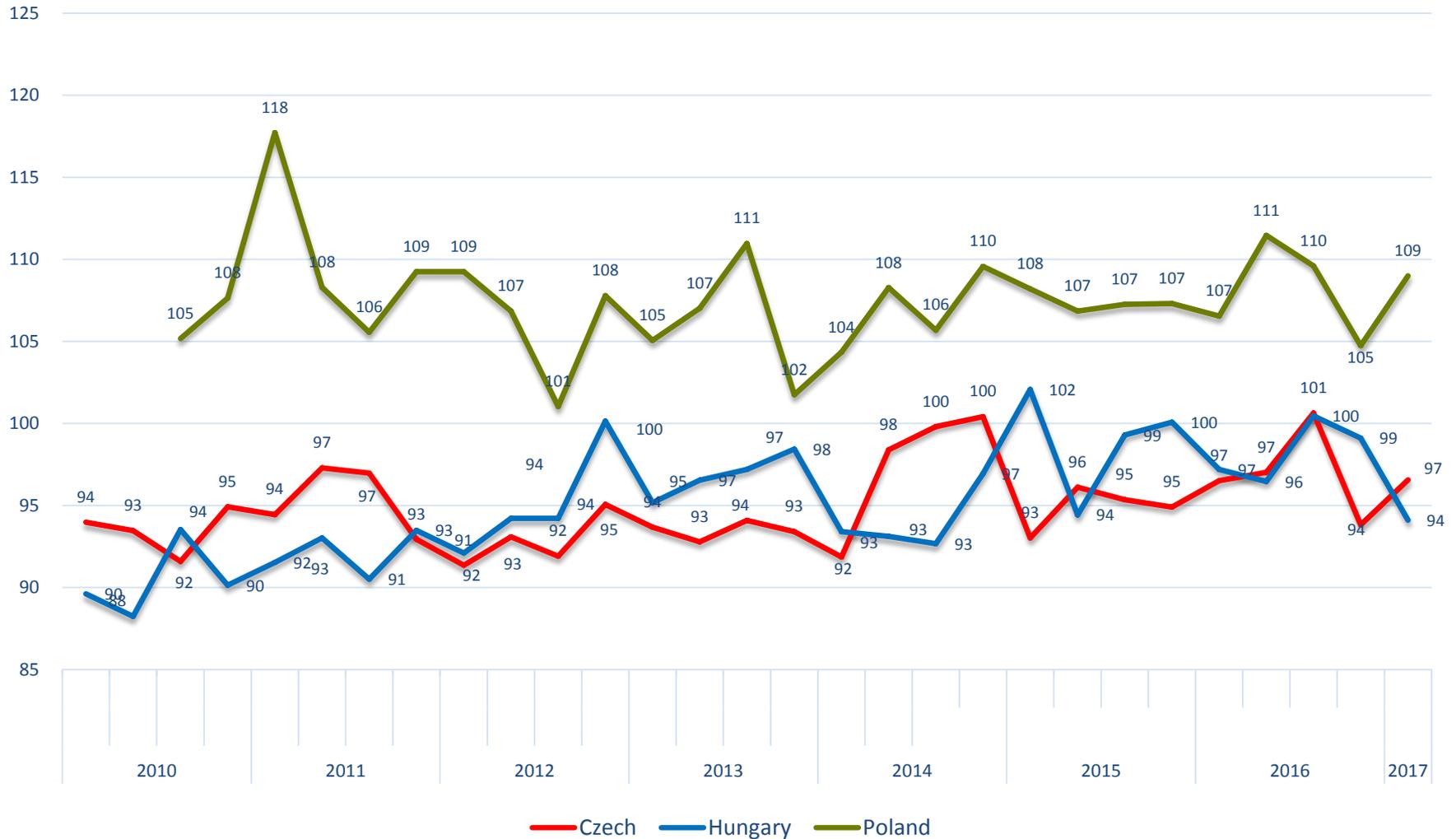
mobility Japan +6, India +6, Hong Kong +5, Malaysia +2, Singapore +2; China -7



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?

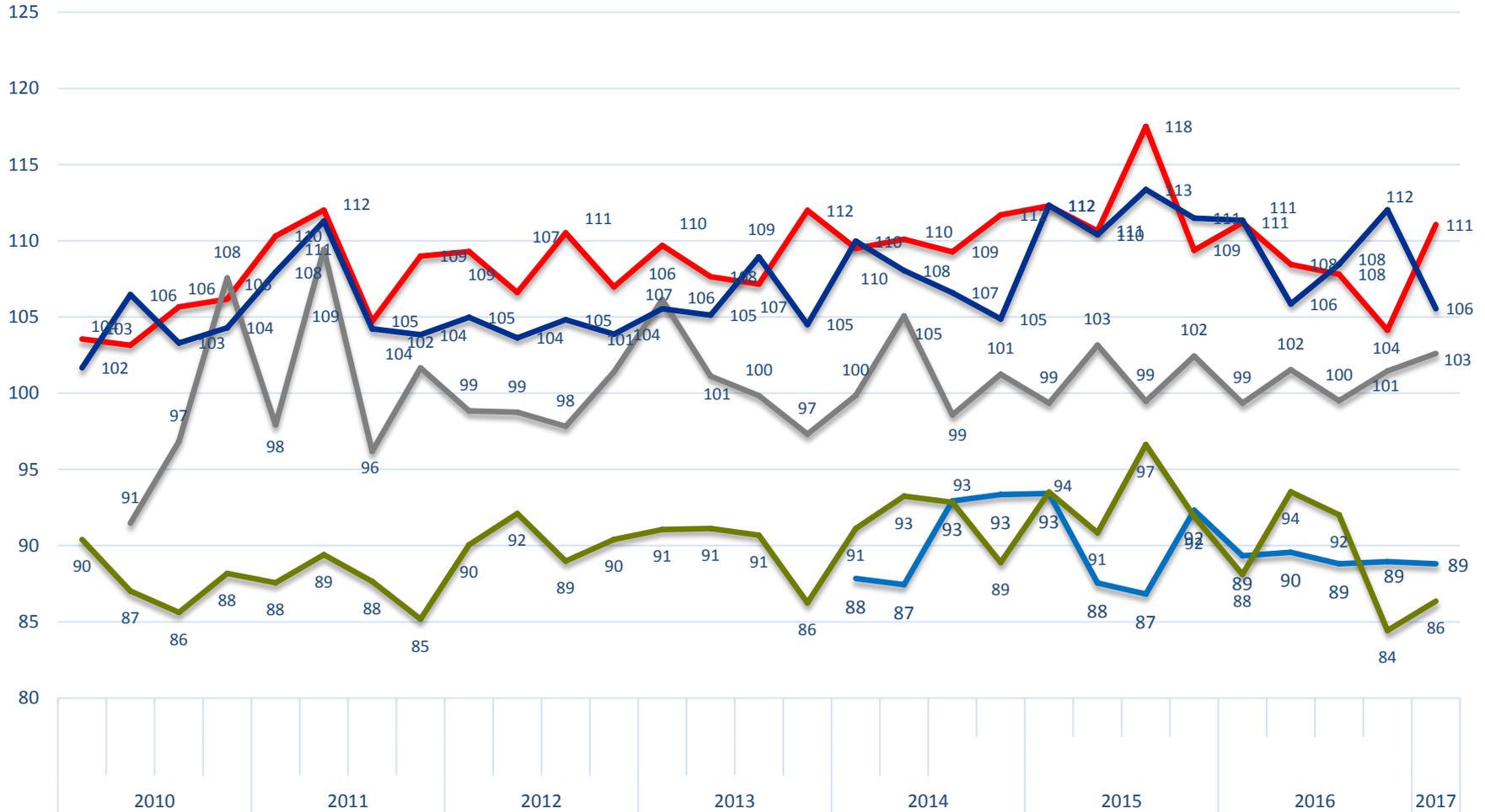
mobility Poland +4 , Czech Republic +3 and Hungary -5



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 France +7, Switzerland +2 and Germany +2; UK -6 and Austria no shift

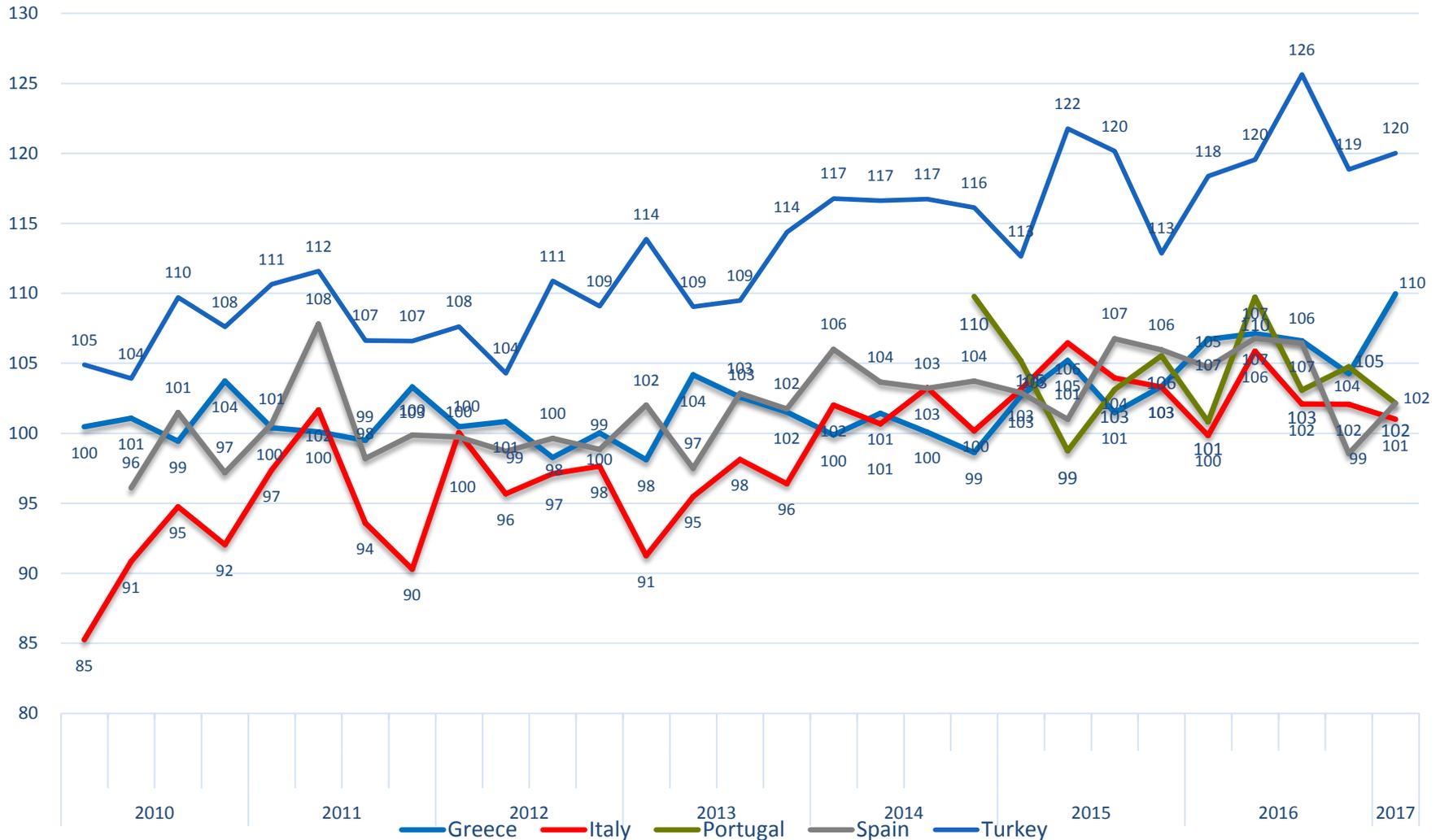


— Austria — France — Germany — Switzerland — UK

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 Greece +6, Spain +3 and Turkey +1; Portugal -3 and Italy -1

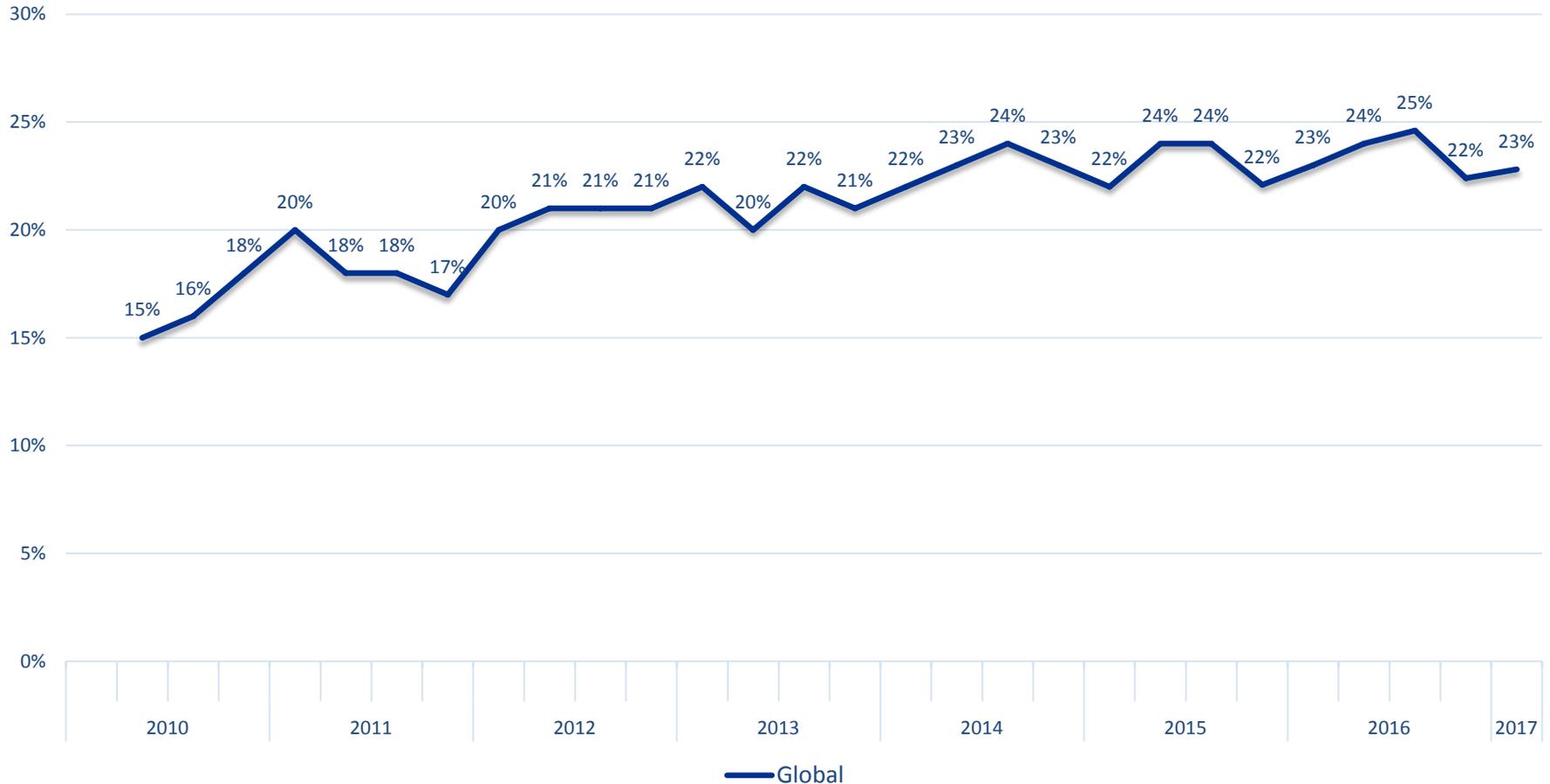


Question:

- 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

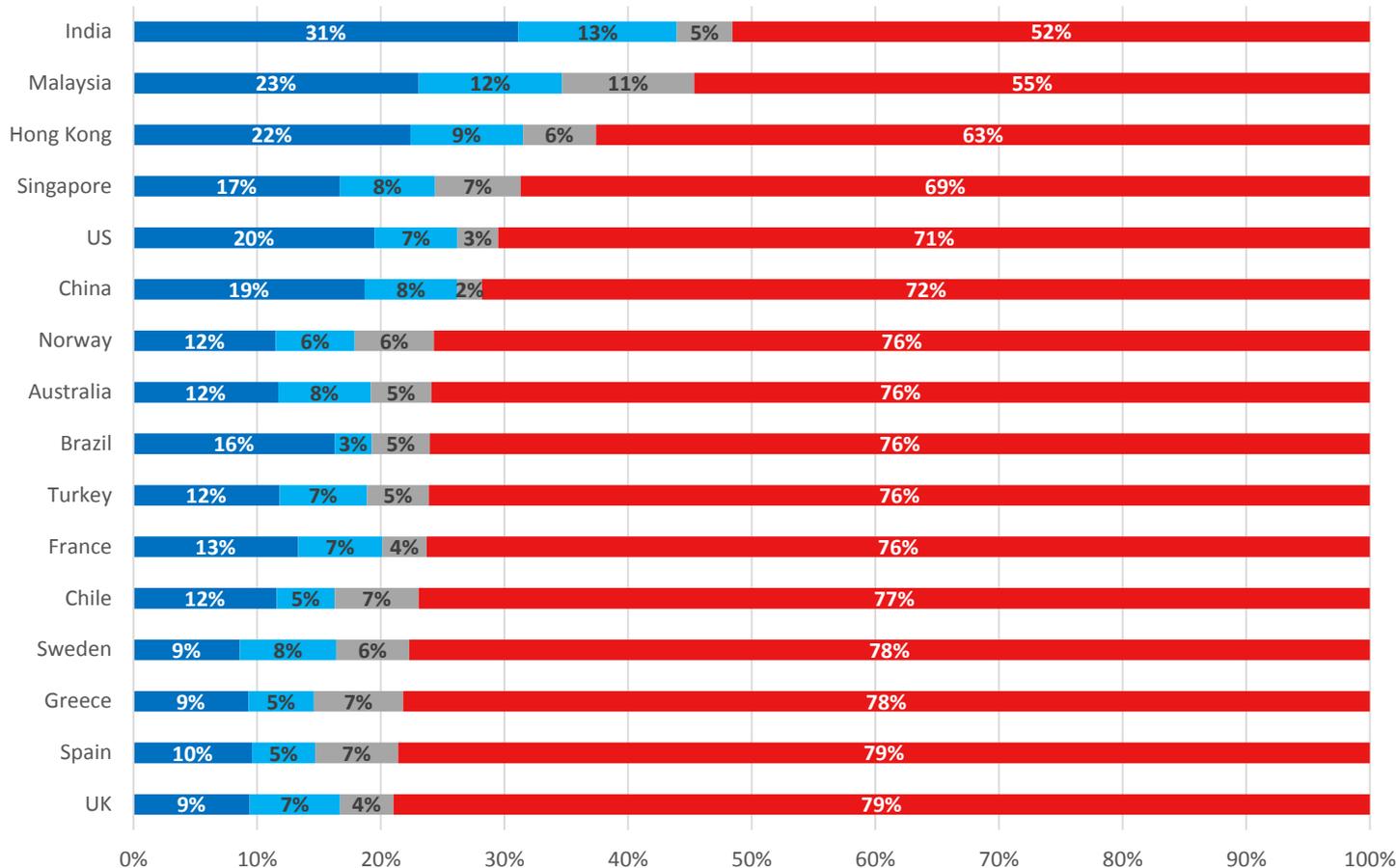
actual job change slightly increased and is now on same level as Q1 2016



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



Job change increased in Brazil, the UK and Turkey compared to last quarter.

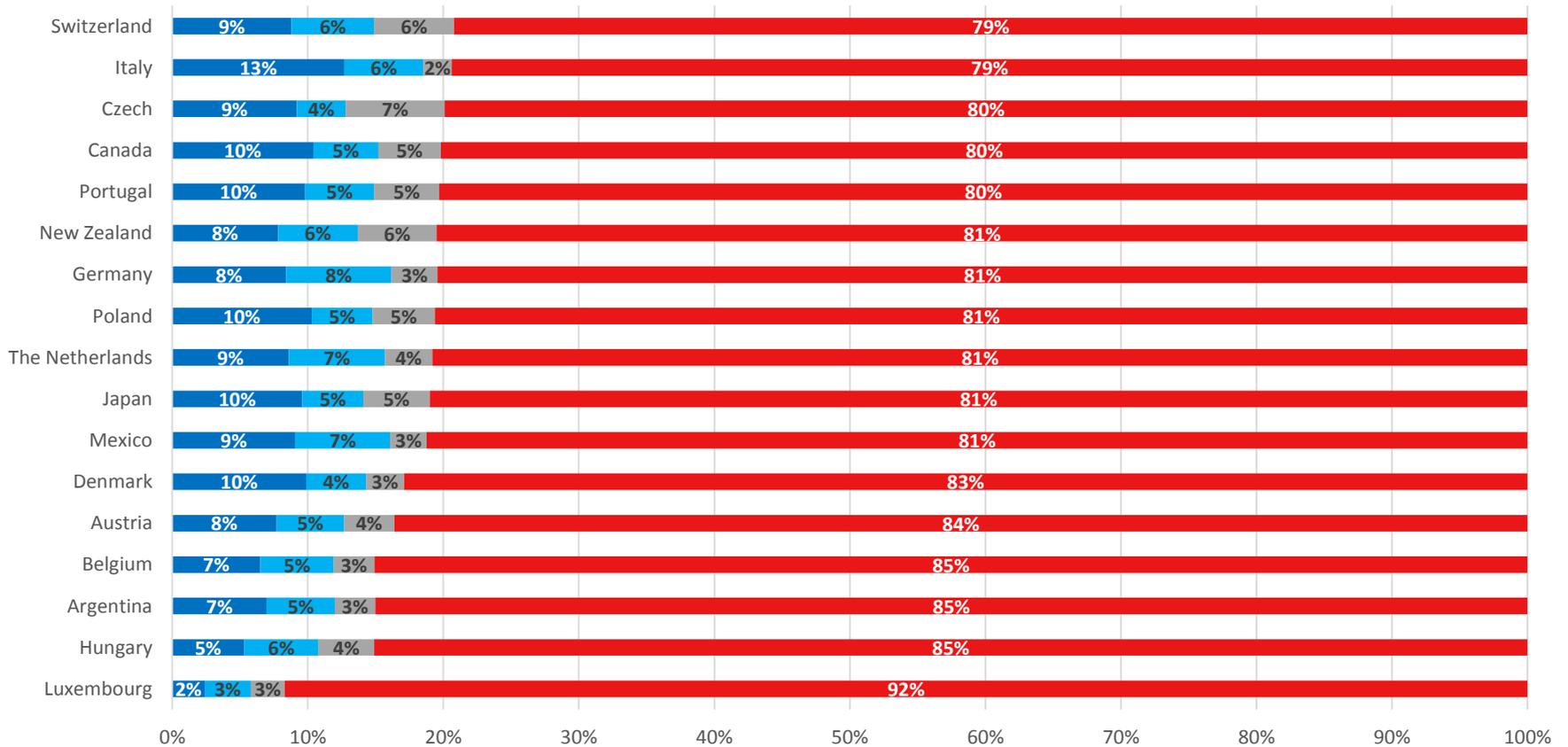
In Canada, France, Japan, Malaysia and Singapore the job change decreased compared to last quarter.

- 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

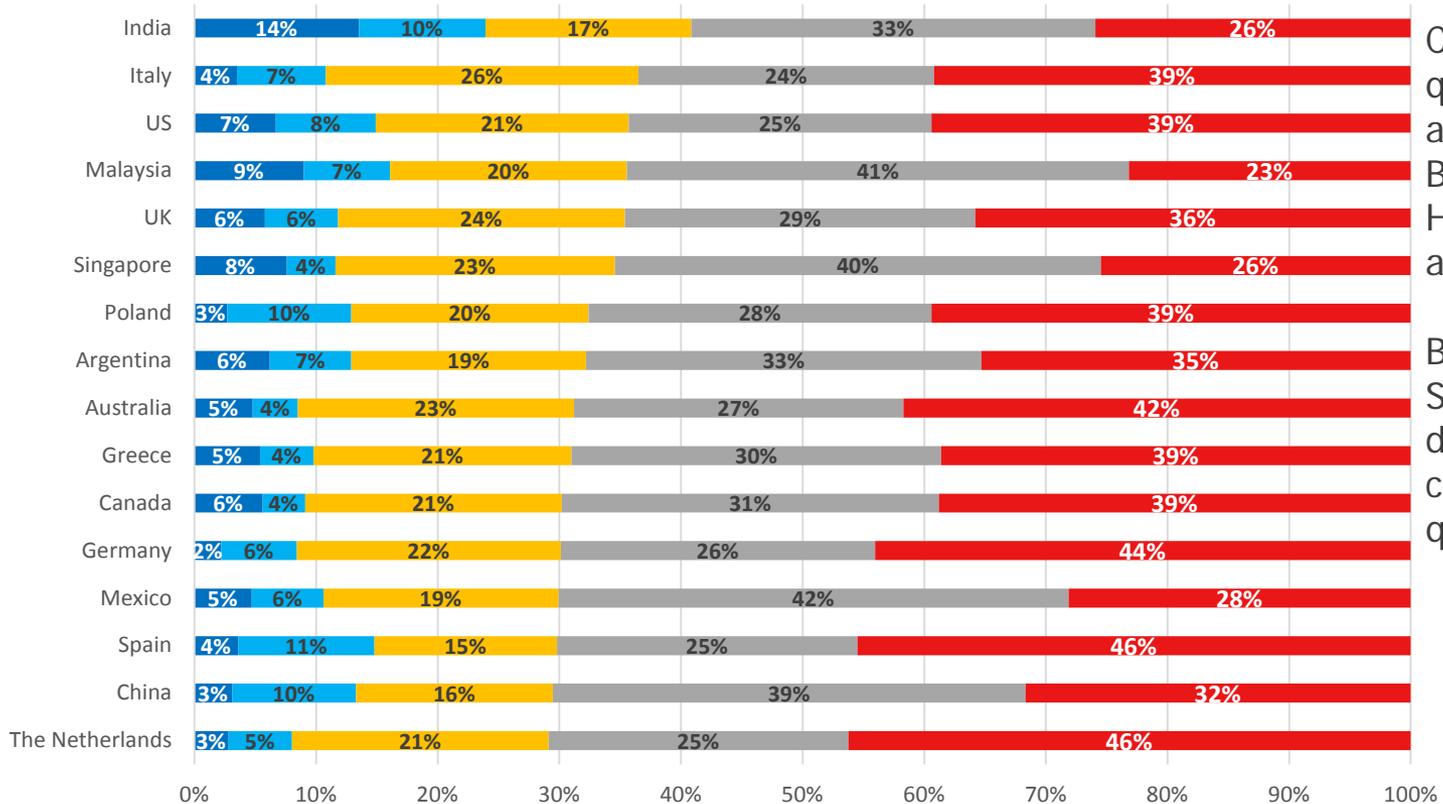


- Yes, I currently work in a comparable position at another employer
- Yes, I currently work in a different position at the same employer
- Yes, I currently work in a different position at a different employer
- No, I did not change positions or employers during the past 6 months

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

job change appetite

India has highest appetite for job change



Compared to last quarter, the job appetite increased in Belgium, Germany, Hungary, Malaysia and Spain.

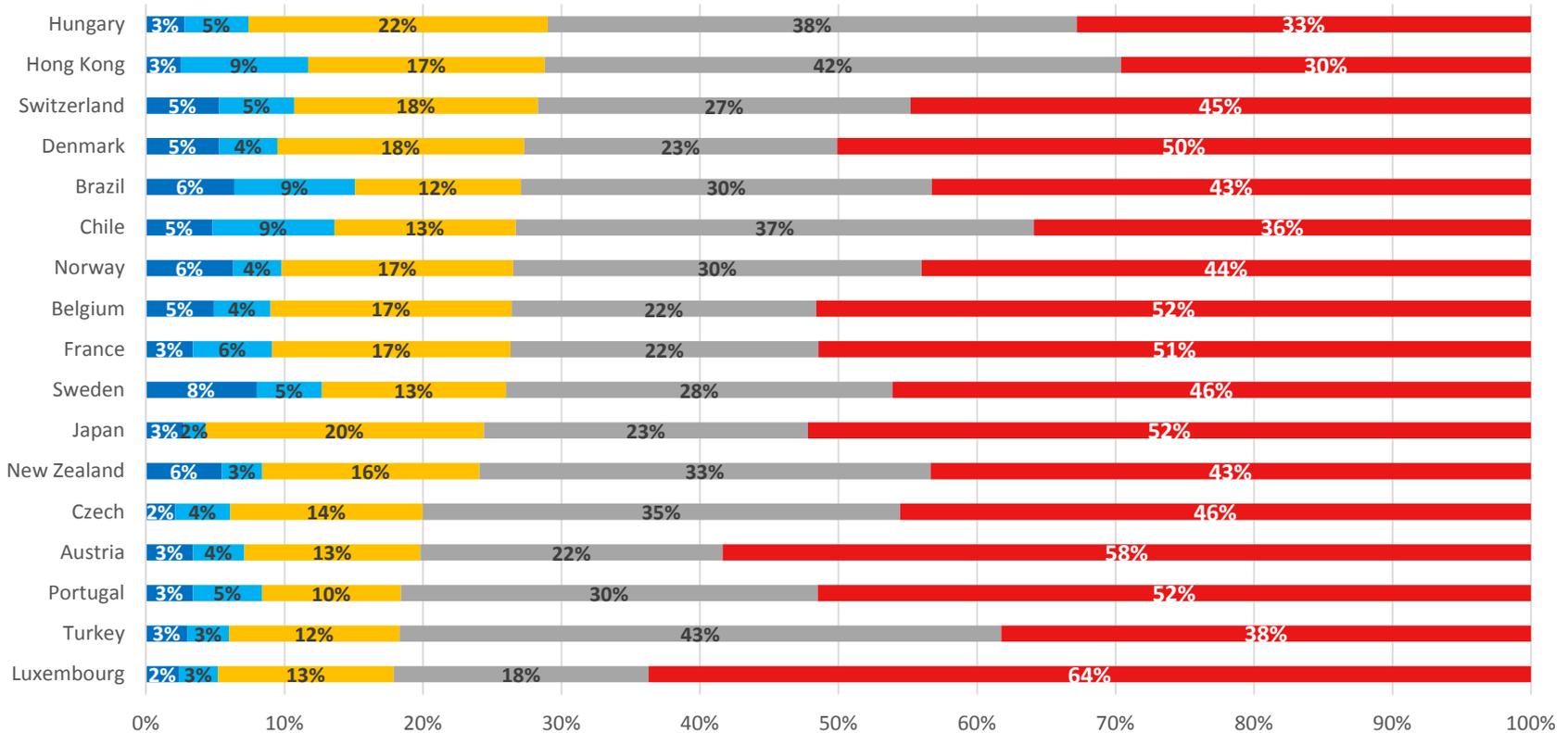
Brazil, Greece and Sweden show a decrease in appetite compared to last quarter.

- I am actively applying for jobs
- I am specifically orientating myself
- I am looking round a bit
- I am not actively doing so, but if something were to come up I would be open to it
- I am not actively doing so

Question:

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

lowest appetite for job change in Luxembourg and Turkey



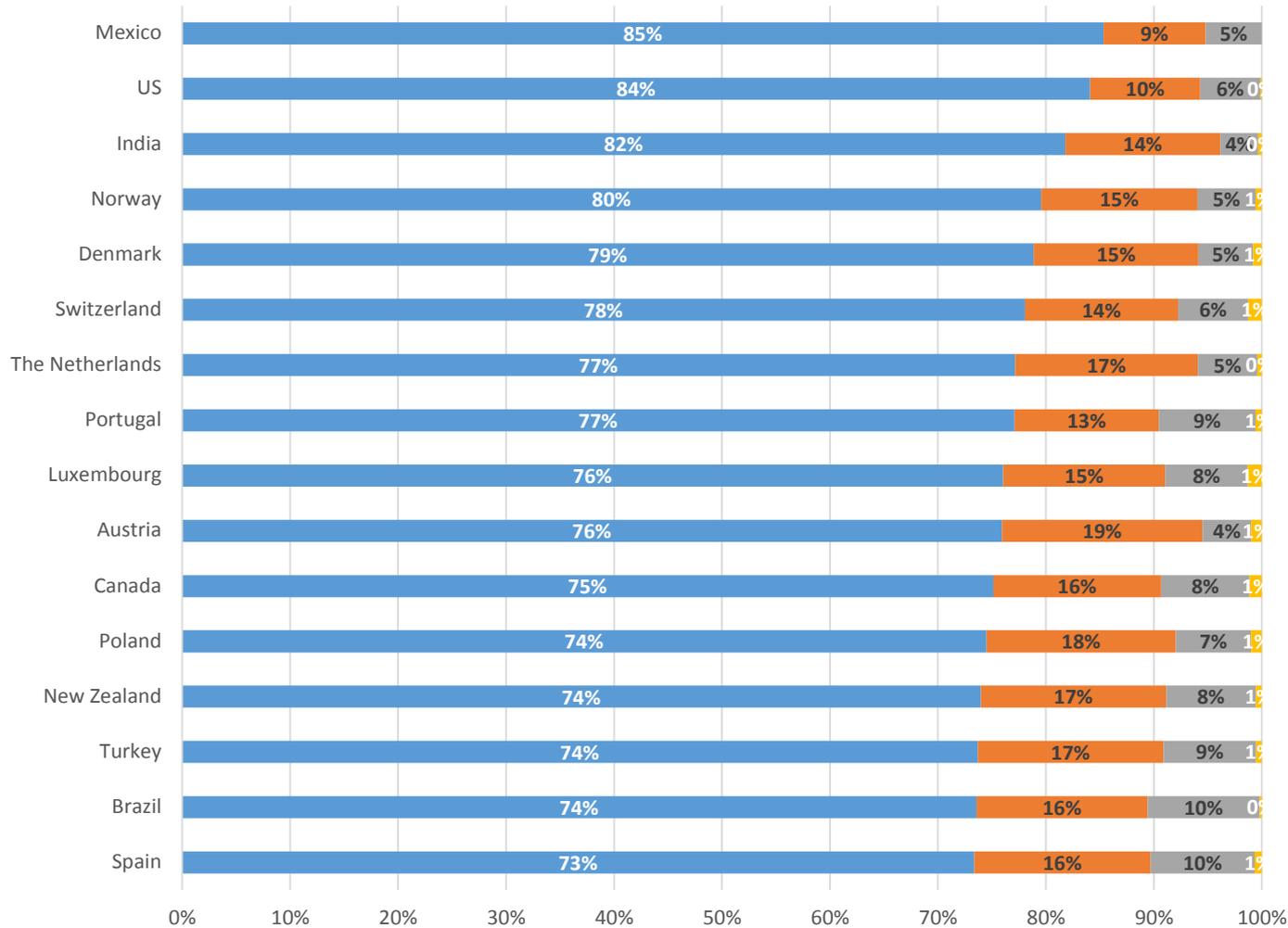
- I am actively applying for jobs
- I am specifically orientating myself
- I am looking round a bit
- I am not actively doing so, but if something were to come up I would be open to it
- I am not actively doing so

Question:

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

job satisfaction

job satisfaction is highest in Mexico and US



Compared to last quarter, the job satisfaction increased in Japan, Poland, Portugal and Singapore.

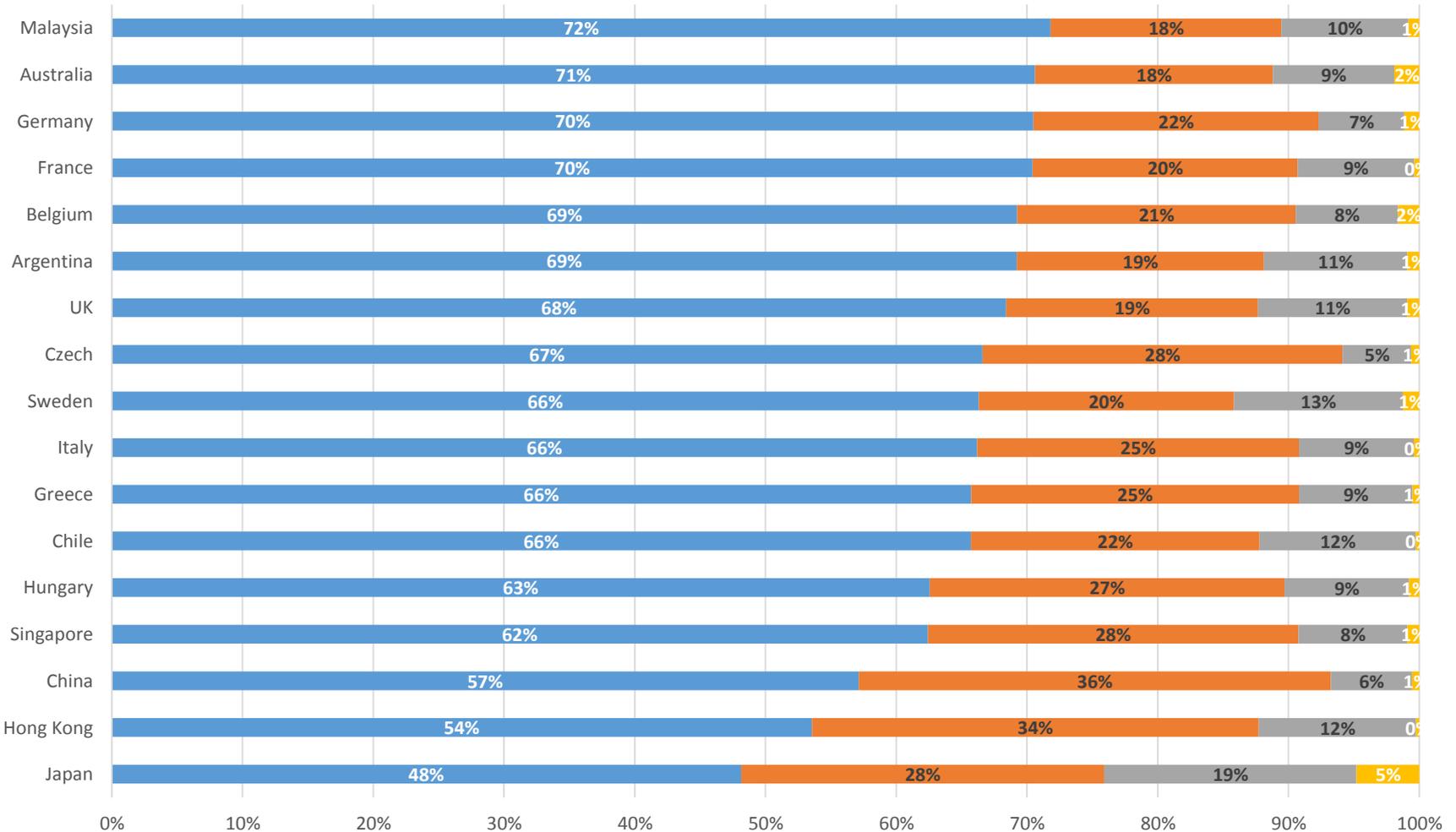
The job satisfaction decreased in Argentina, China, Malaysia, Spain and Sweden.

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 and Hong Kong



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 covers 33 countries around the world. In this quarter Slovakia was not included. 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 2017 was conducted from January 13 till January 29 2017 in the following countries:

Argentina	Czech Republic	Italy	Portugal
Australia	Denmark	Japan	Singapore
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
			US

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