

global report Randstad Workmonitor wave 2, 2017

Lifelong learning considered essential to increase employability and avoid unemployment

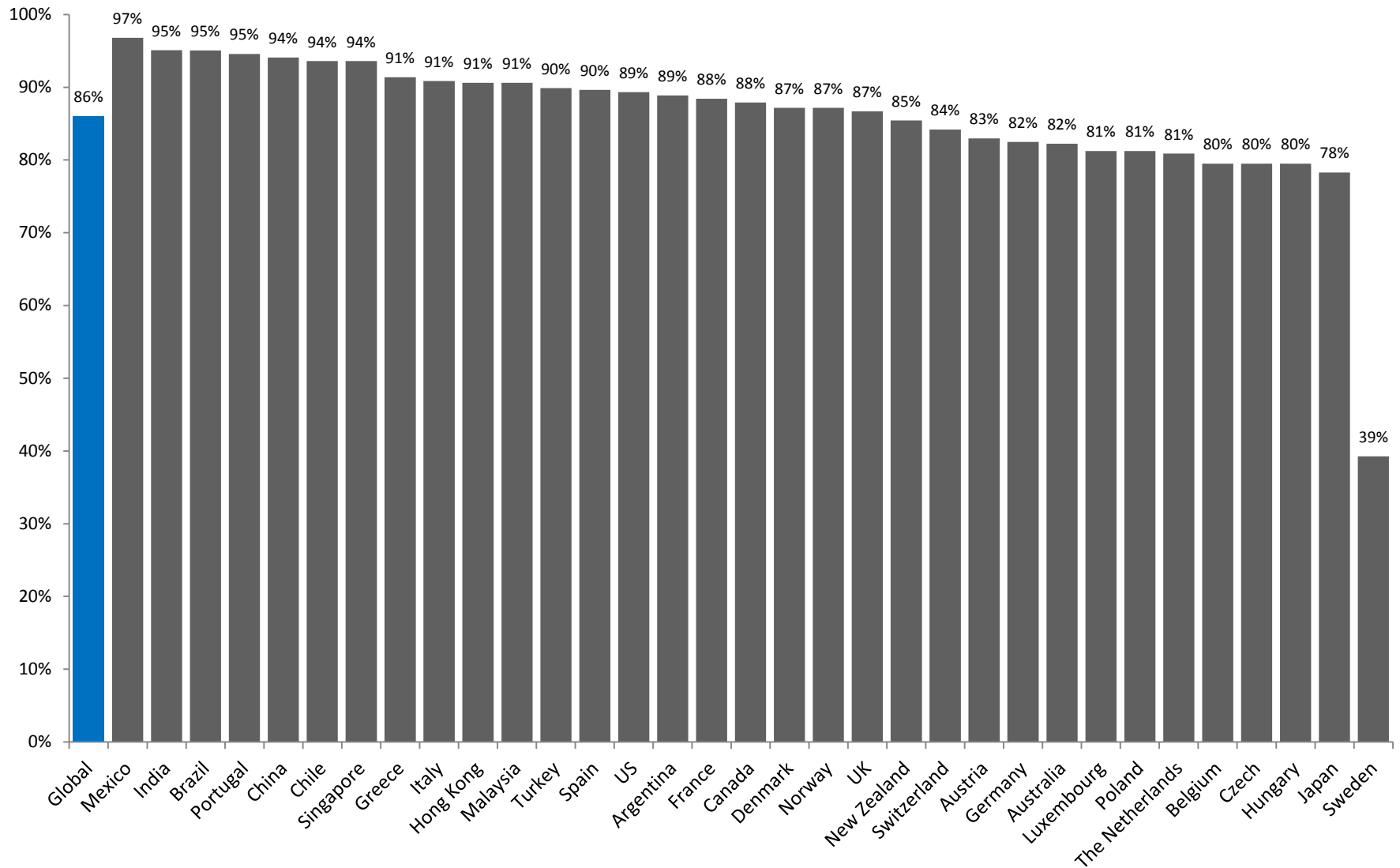
incl. quarterly mobility, job change and job satisfaction

Group Communications
Randstad Holding nv
June 2017

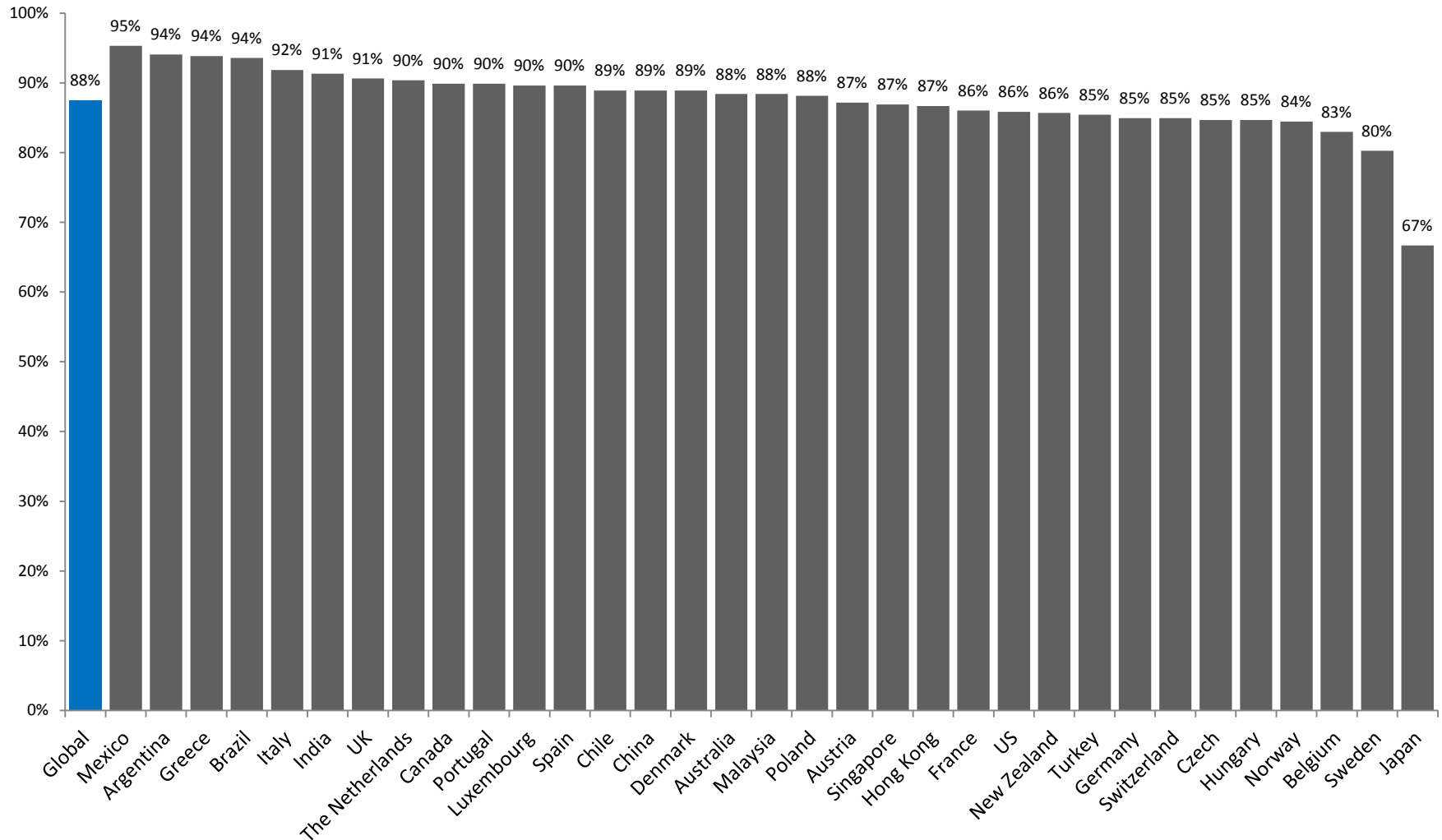


outlook on employability and avoidance of unemployment

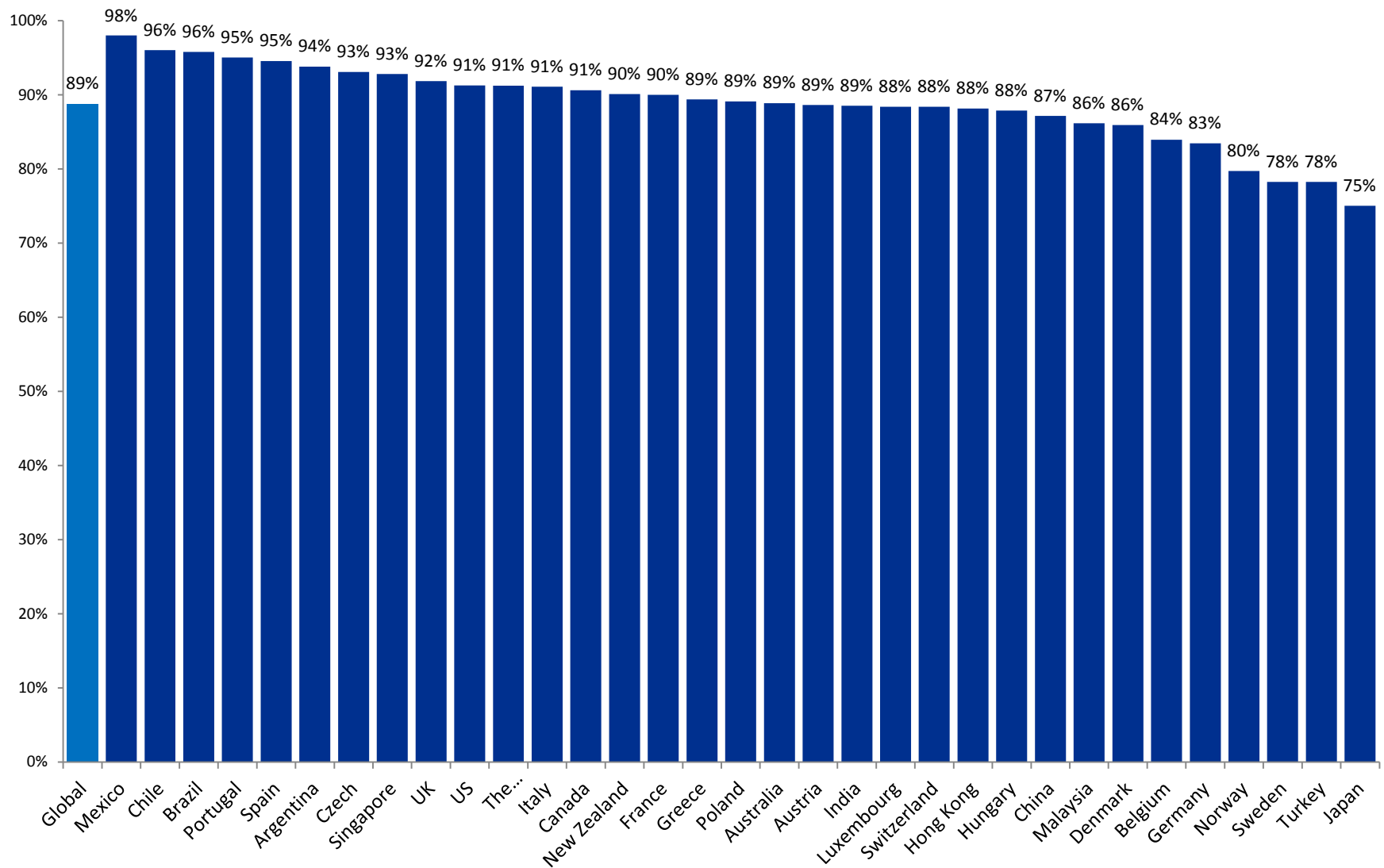
86% agree that they need to keep learning in order to retain or increase their employability



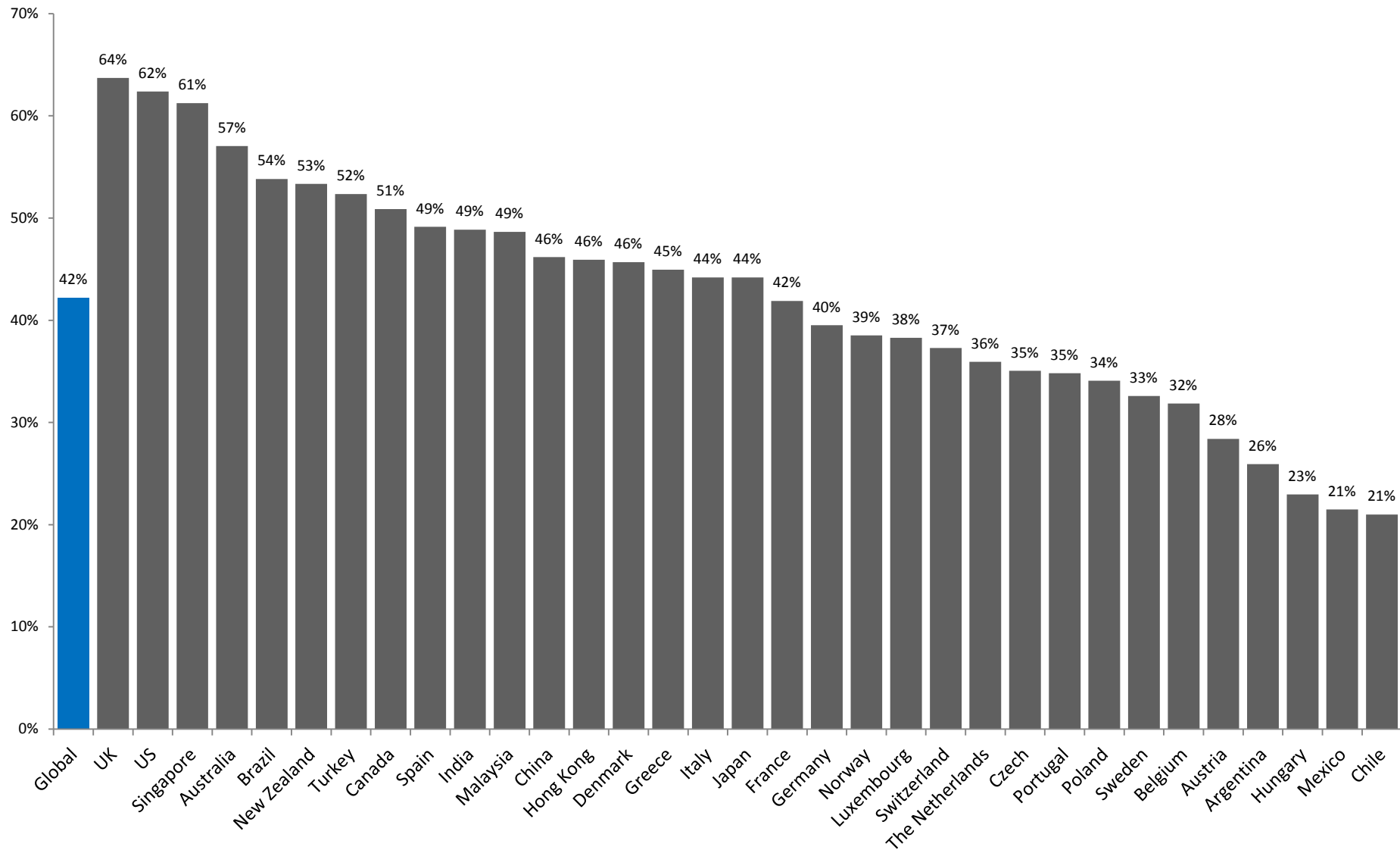
88% agree that unemployed people must be retrained as much as possible so that they can fill in jobs that cannot be filled because of labor scarcity



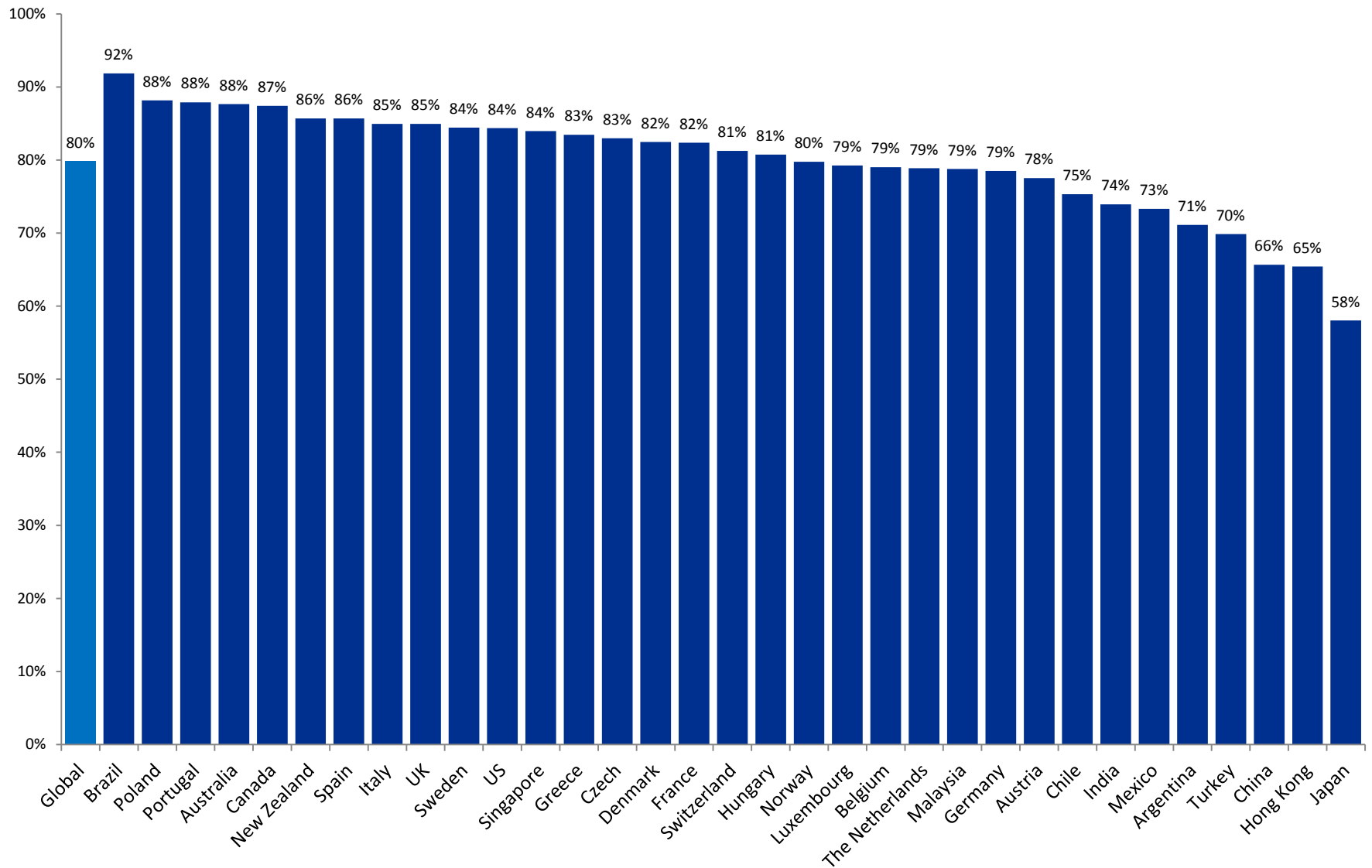
89% would be willing to be retrained themselves in order to avoid unemployment



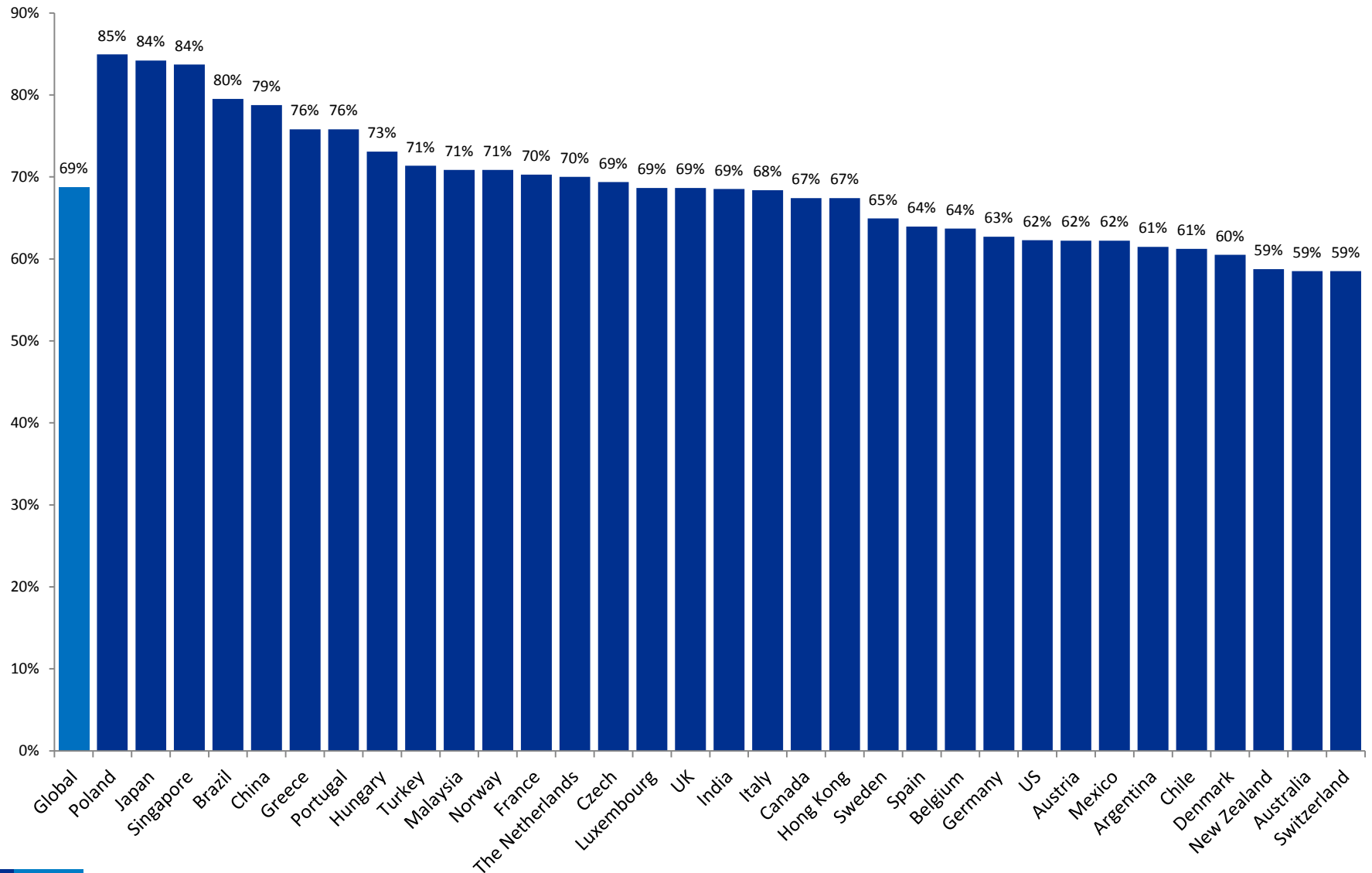
42% would accept a lower salary or demotion in order to remain employed



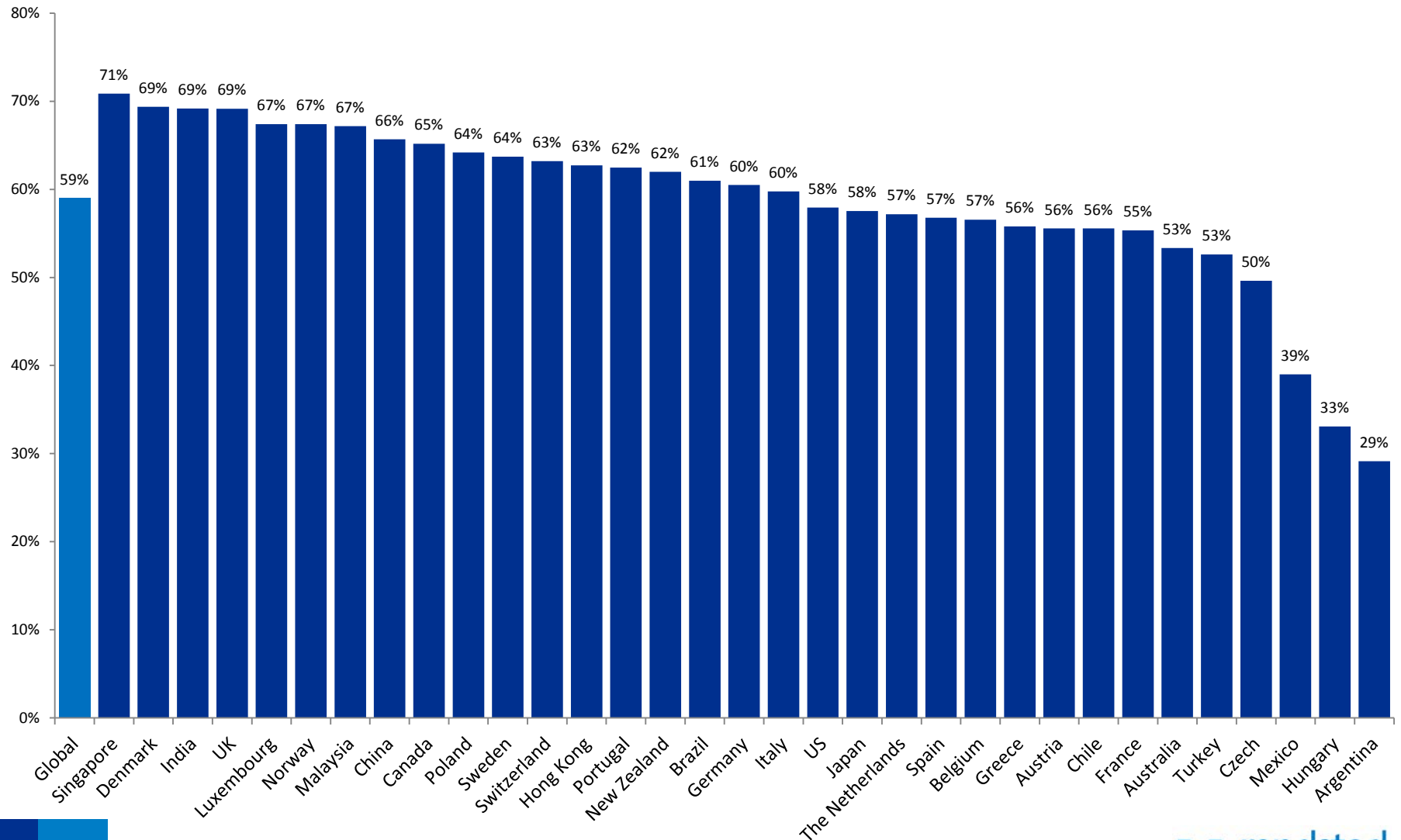
80% would accept a temporary contract in order to avoid unemployment



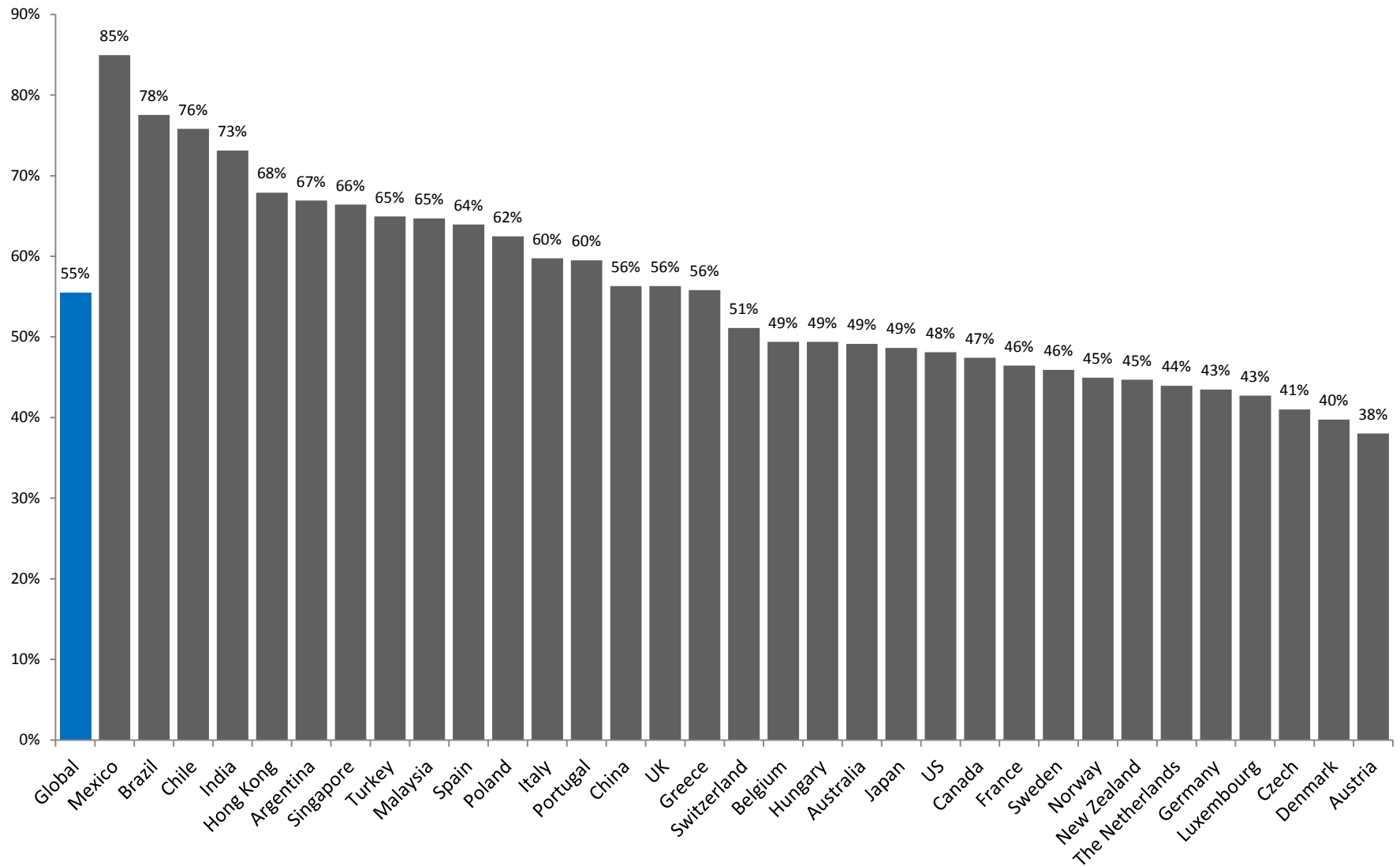
69% expect labor supply for certain jobs to become scarce in their country in the near future



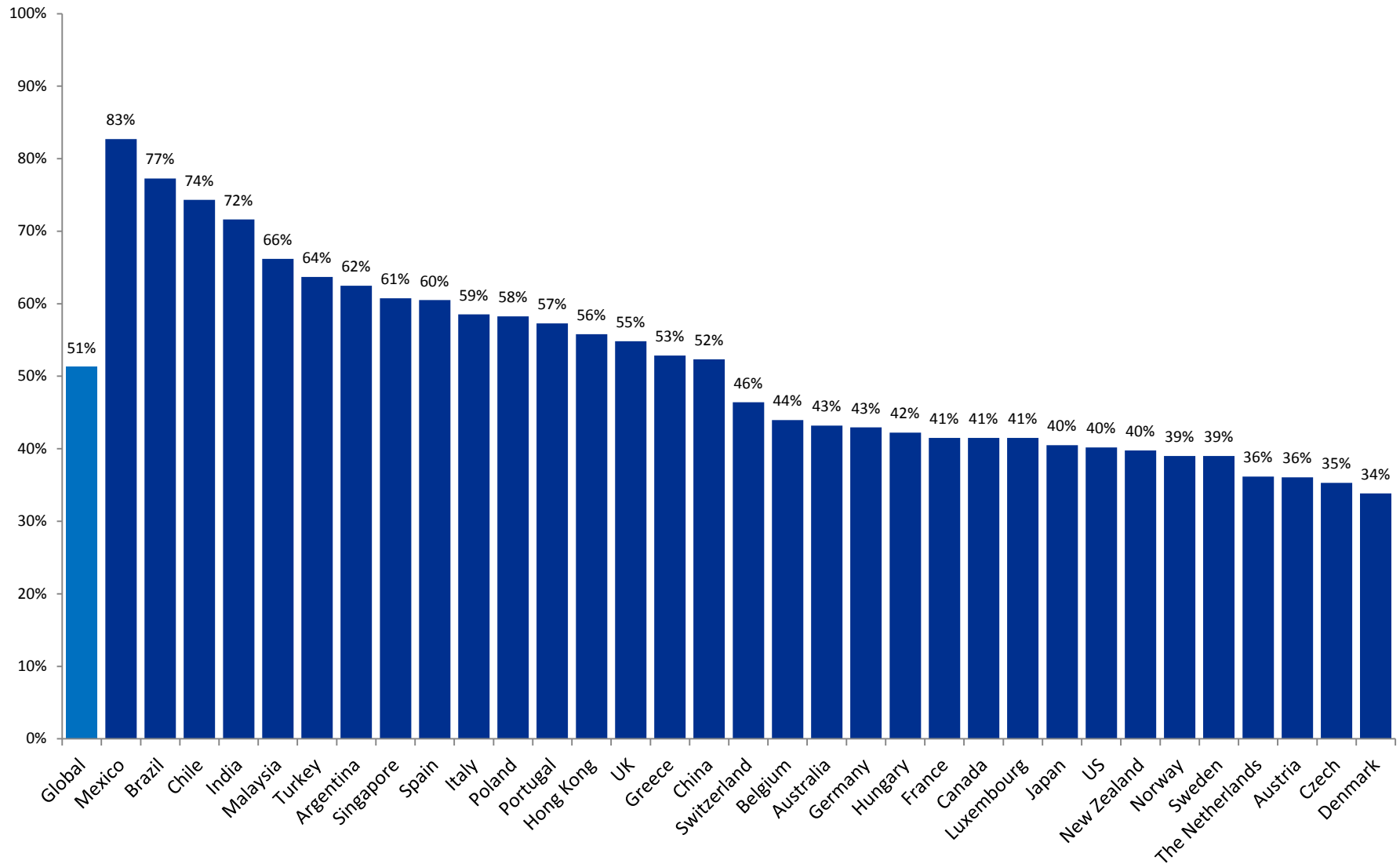
59% agree that it must be possible to attract people from abroad to fill vacancies in case these cannot be filled with the local labor force



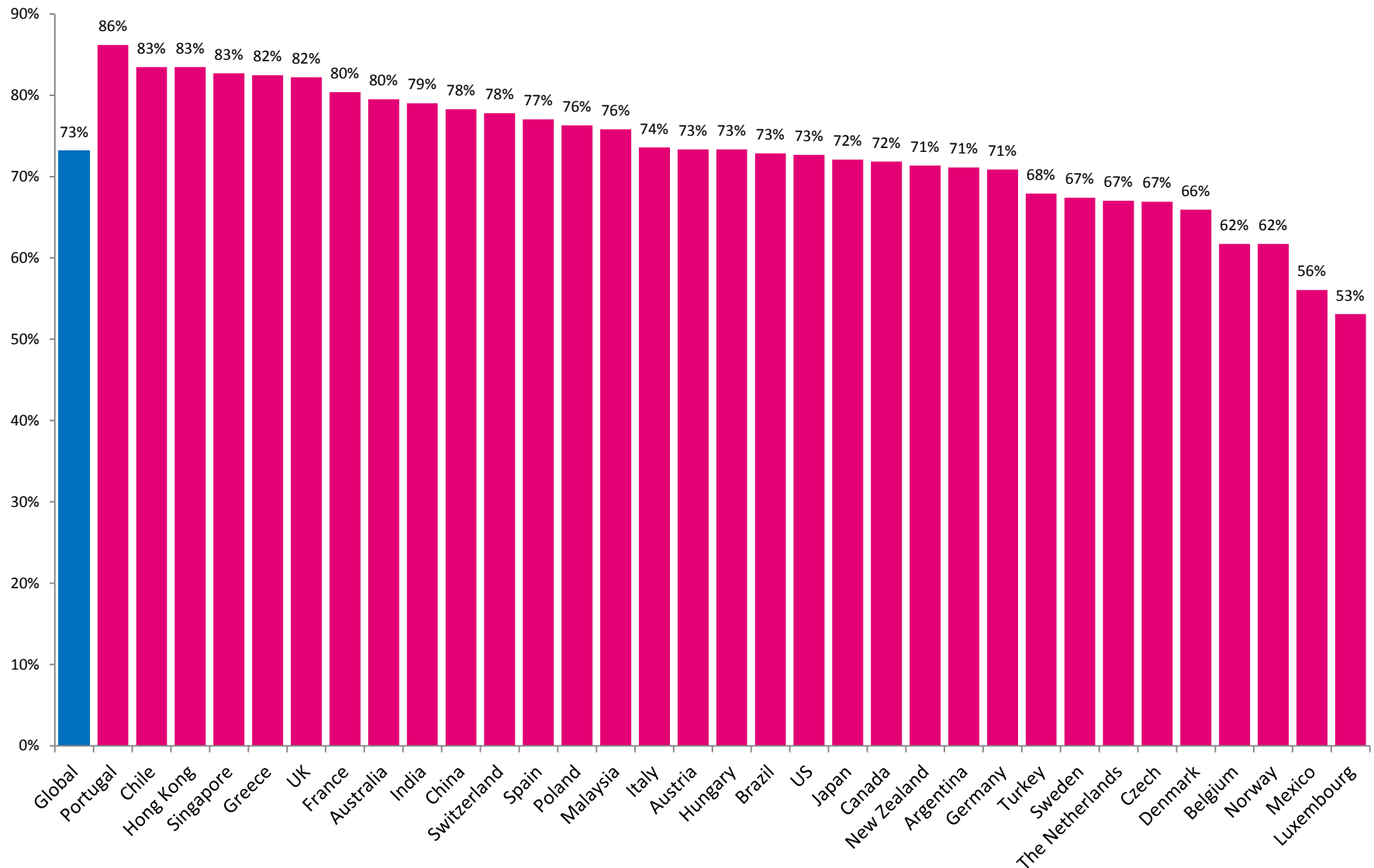
55% would be willing to move temporarily abroad for a job that's not available in their country



51% would be willing to emigrate for a job that's not available in their country

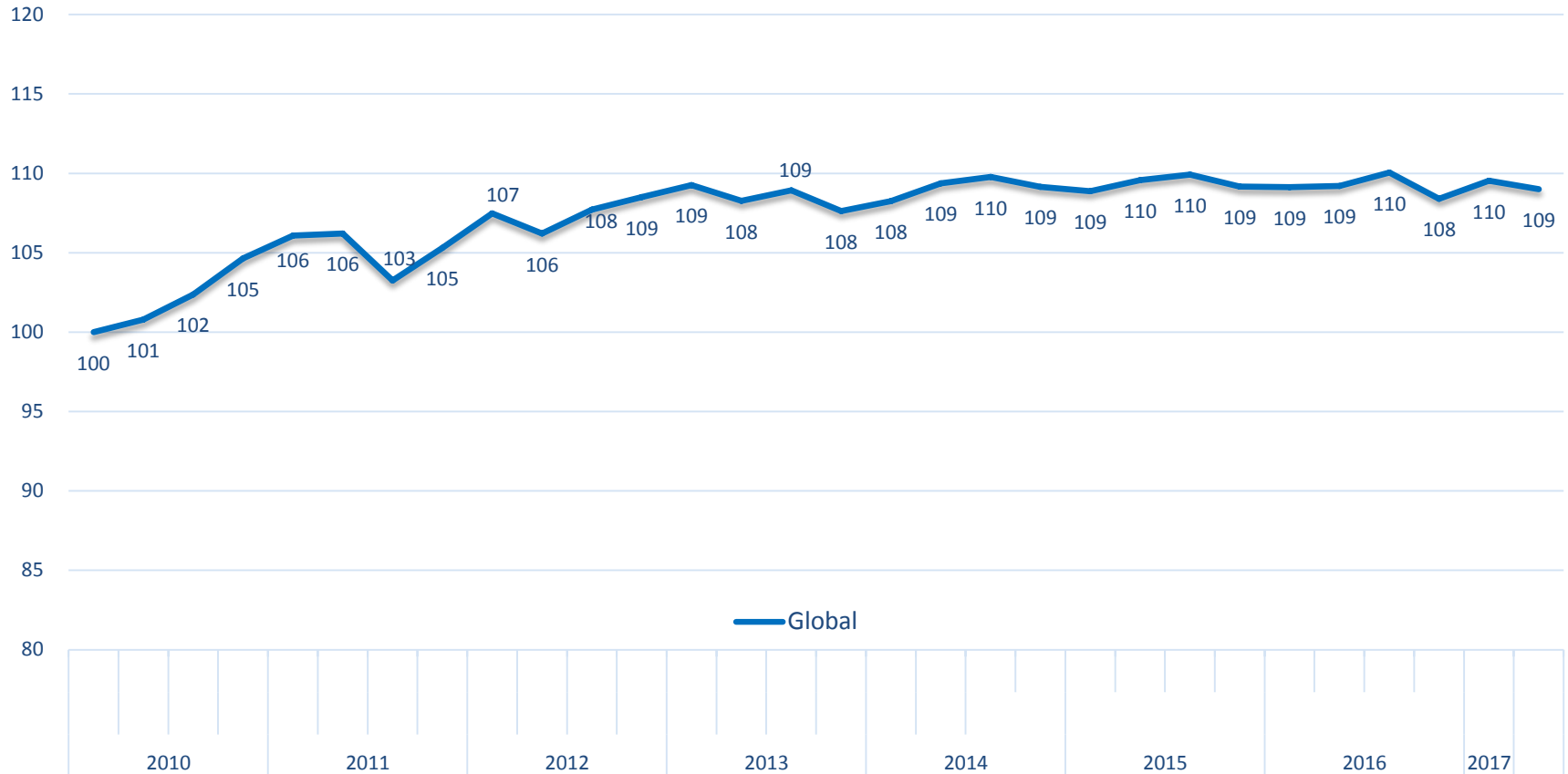


73% think that a so-called 'job-for-life' has become extinct



mobility index

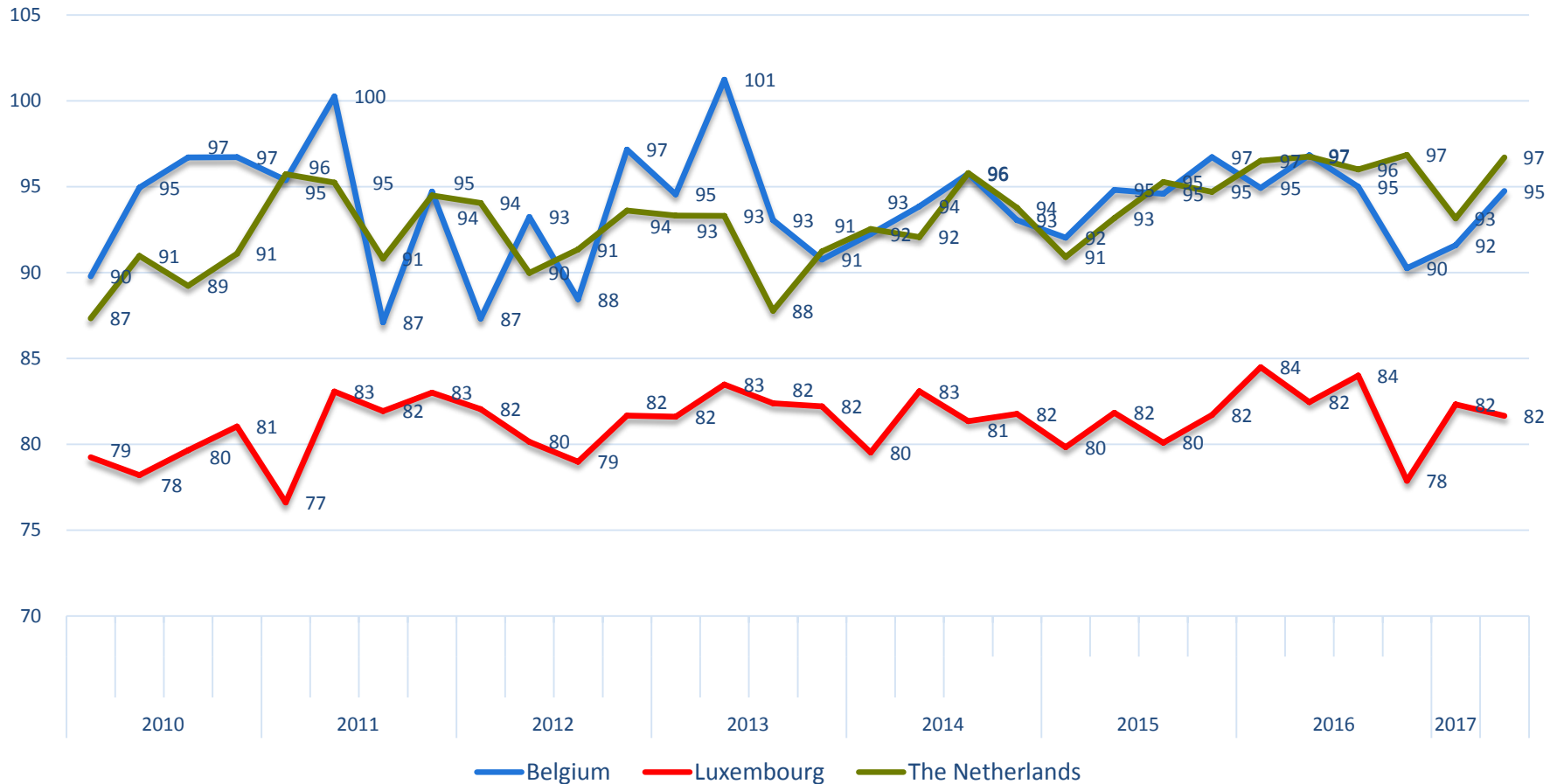
the global Mobility Index slightly decreased from 110 to 109 points



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?

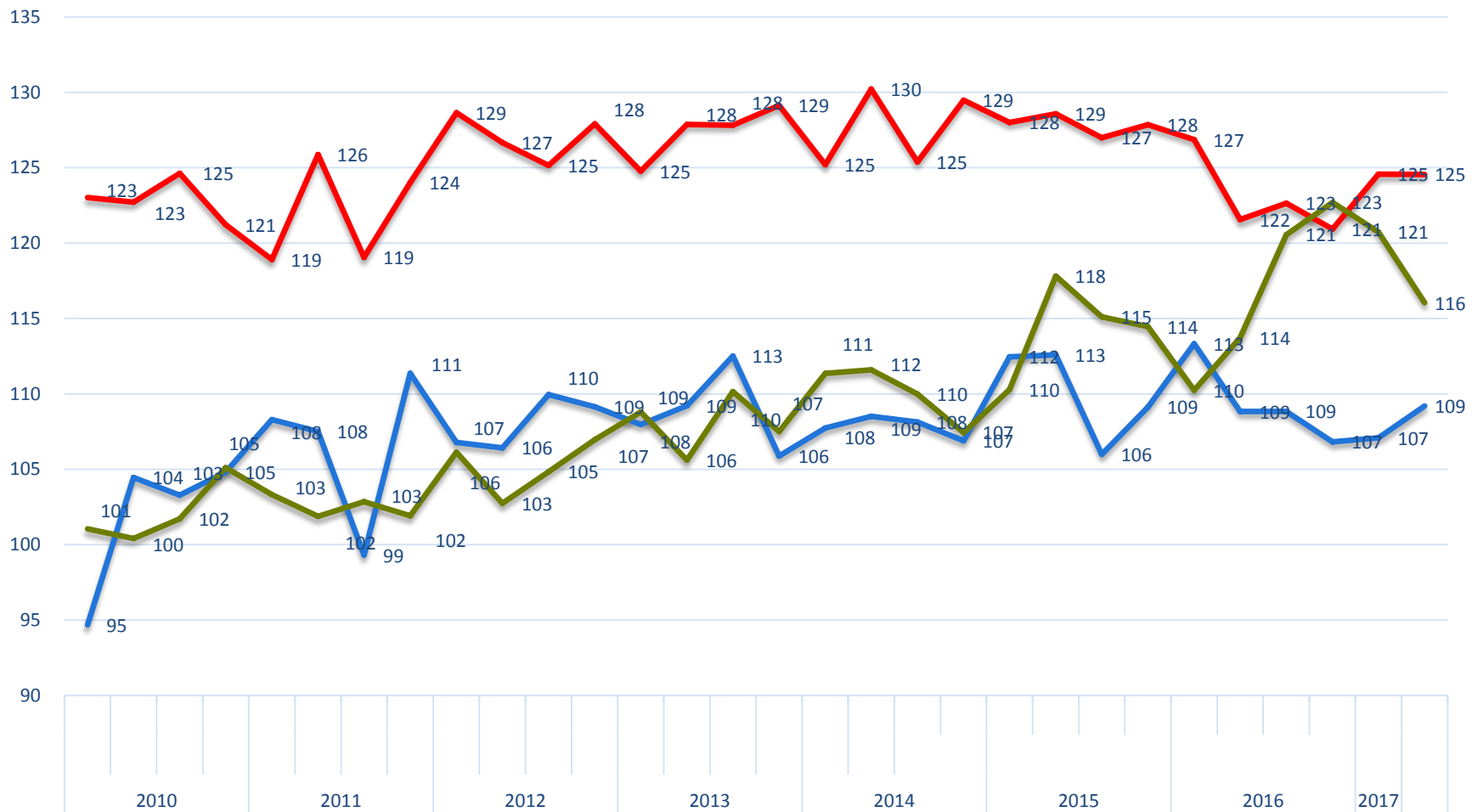
mobility the Netherlands +4 and Belgium +3; Luxembourg no shift



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 Canada +2; US -5 and Mexico no shift

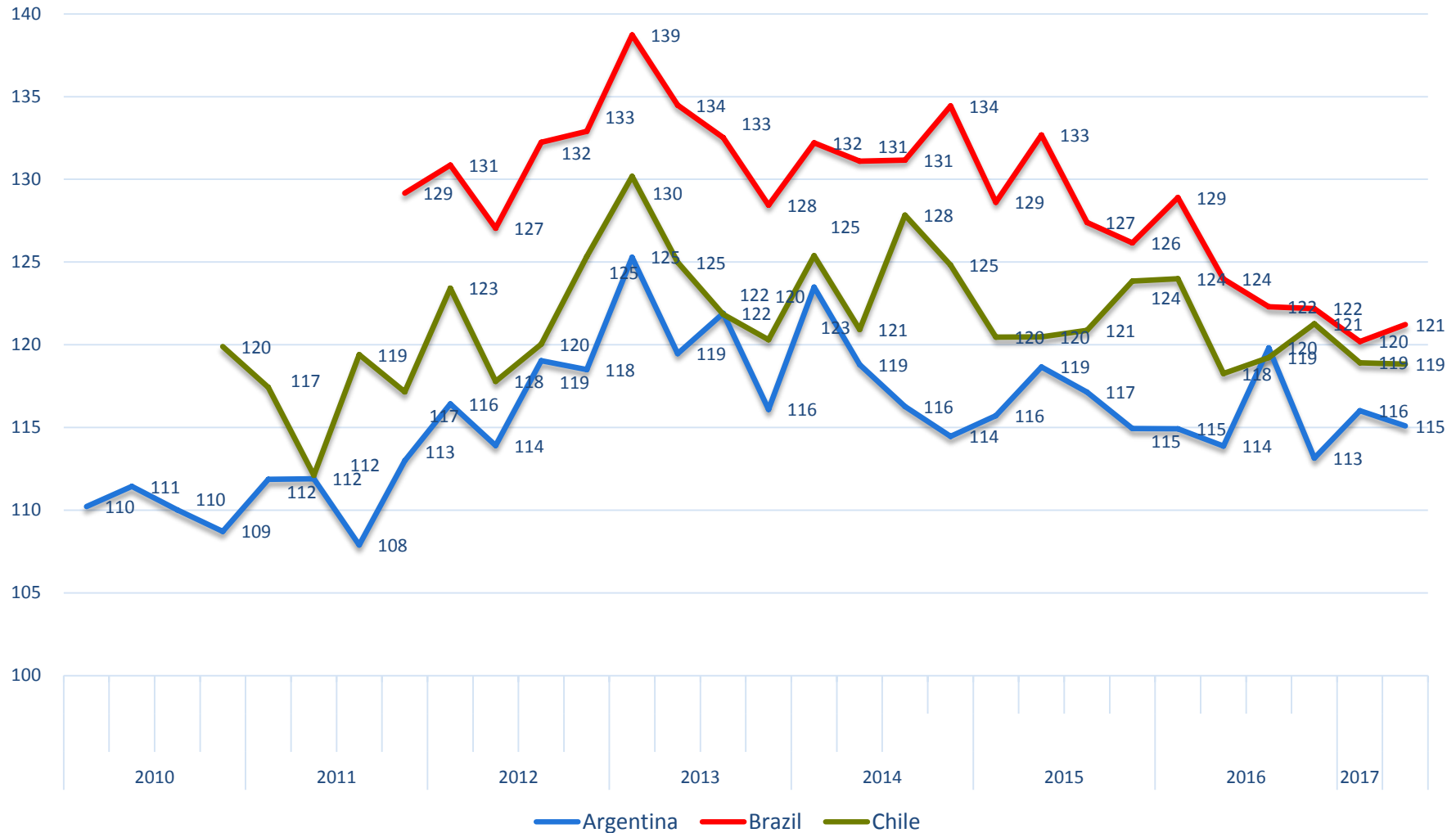


Question:

— 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?

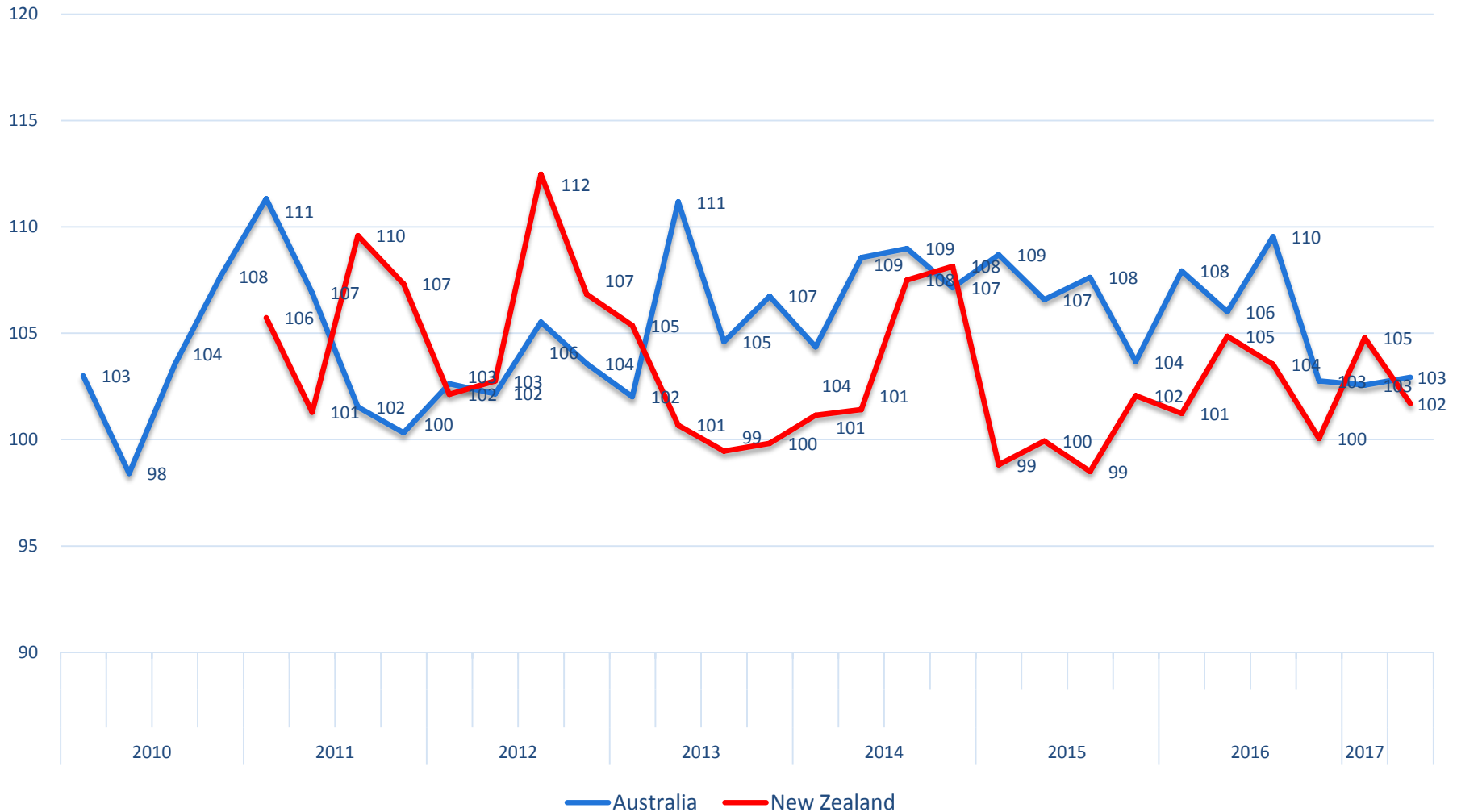
mobility Brazil +1 and Argentina -1; Chile no shift



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?

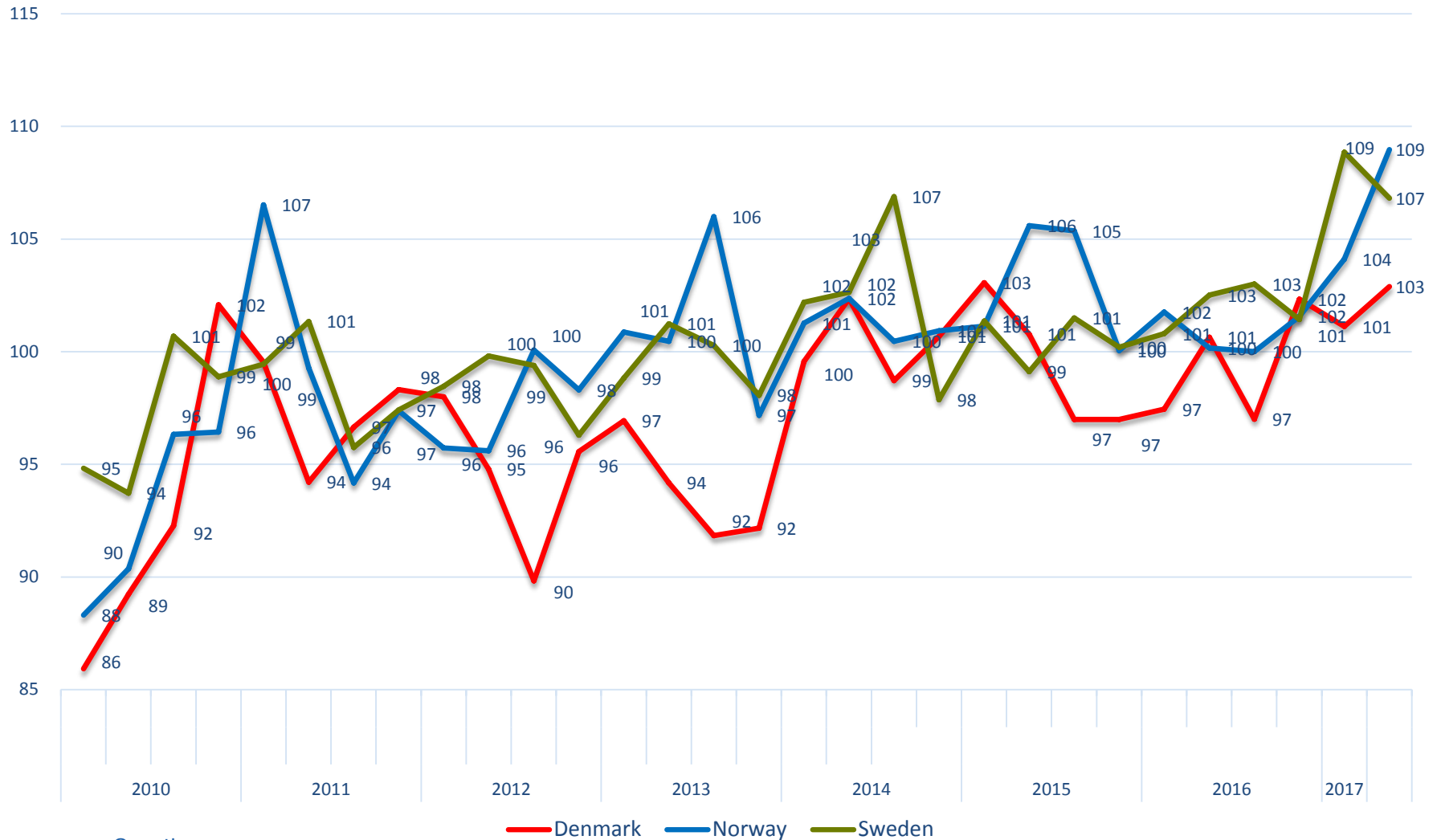
mobility New Zealand -3; Australia no shift



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?

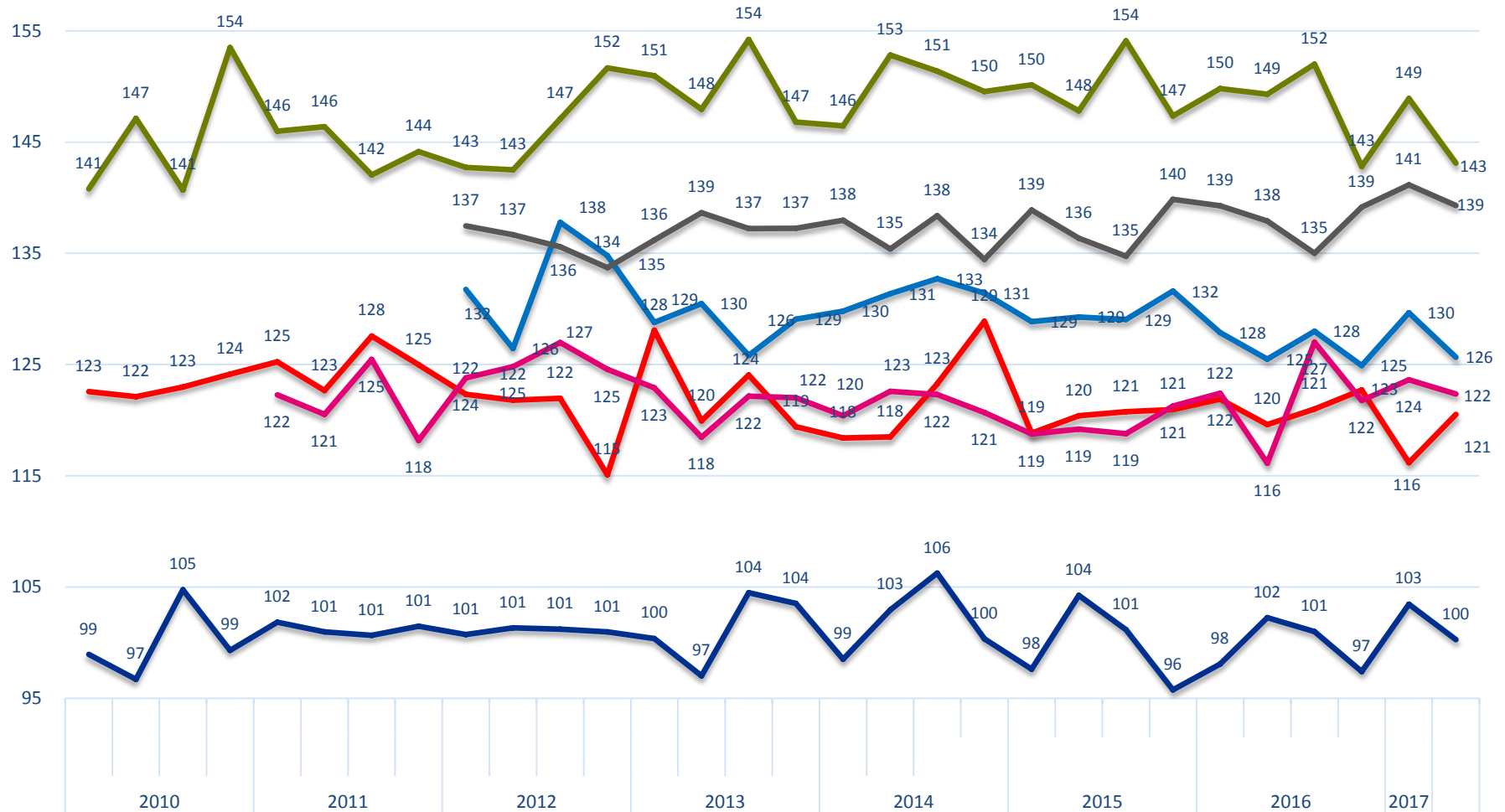
mobility Norway +5 and Denmark +2; Sweden -2



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?

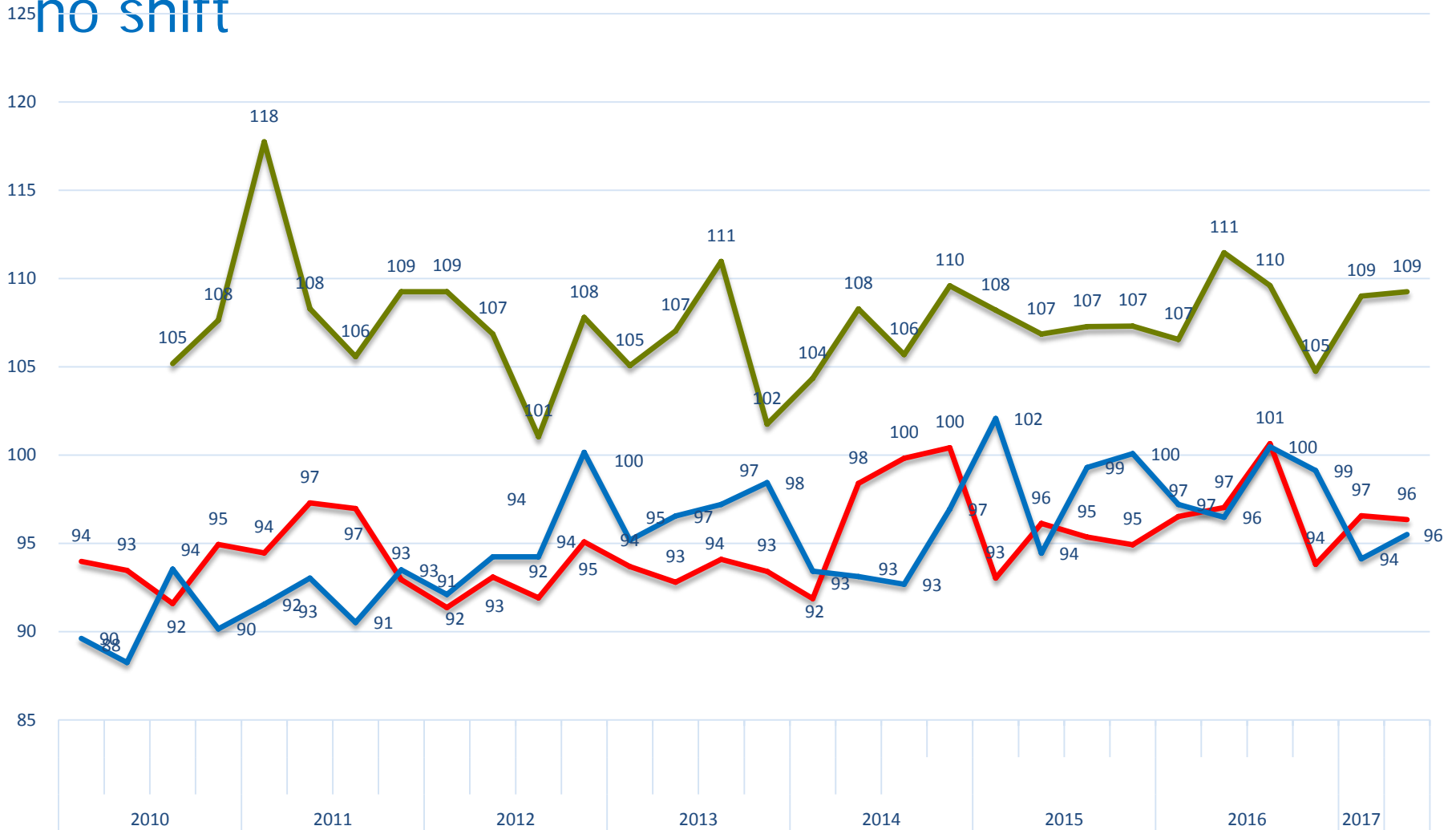
mobility China +5; India -6, Hong Kong -4, Japan -3, Malaysia -2 and Singapore -2



Question: — China — Hong Kong — India — Japan — Malaysia — Singapore

- 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 Hungary +2 and Czech Republic -1; Poland no shift

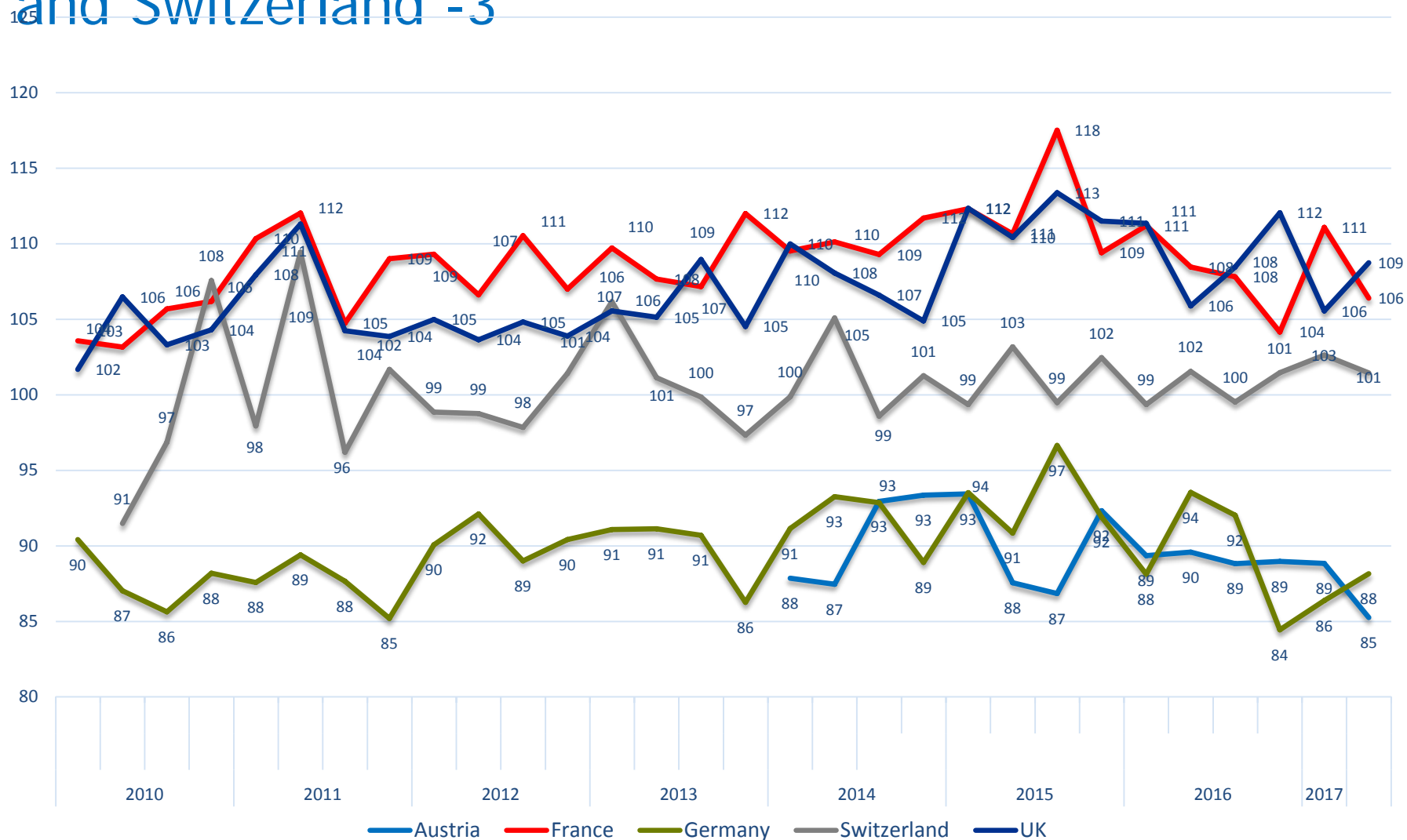


Question:

— Czech — Hungary — Poland

- 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?

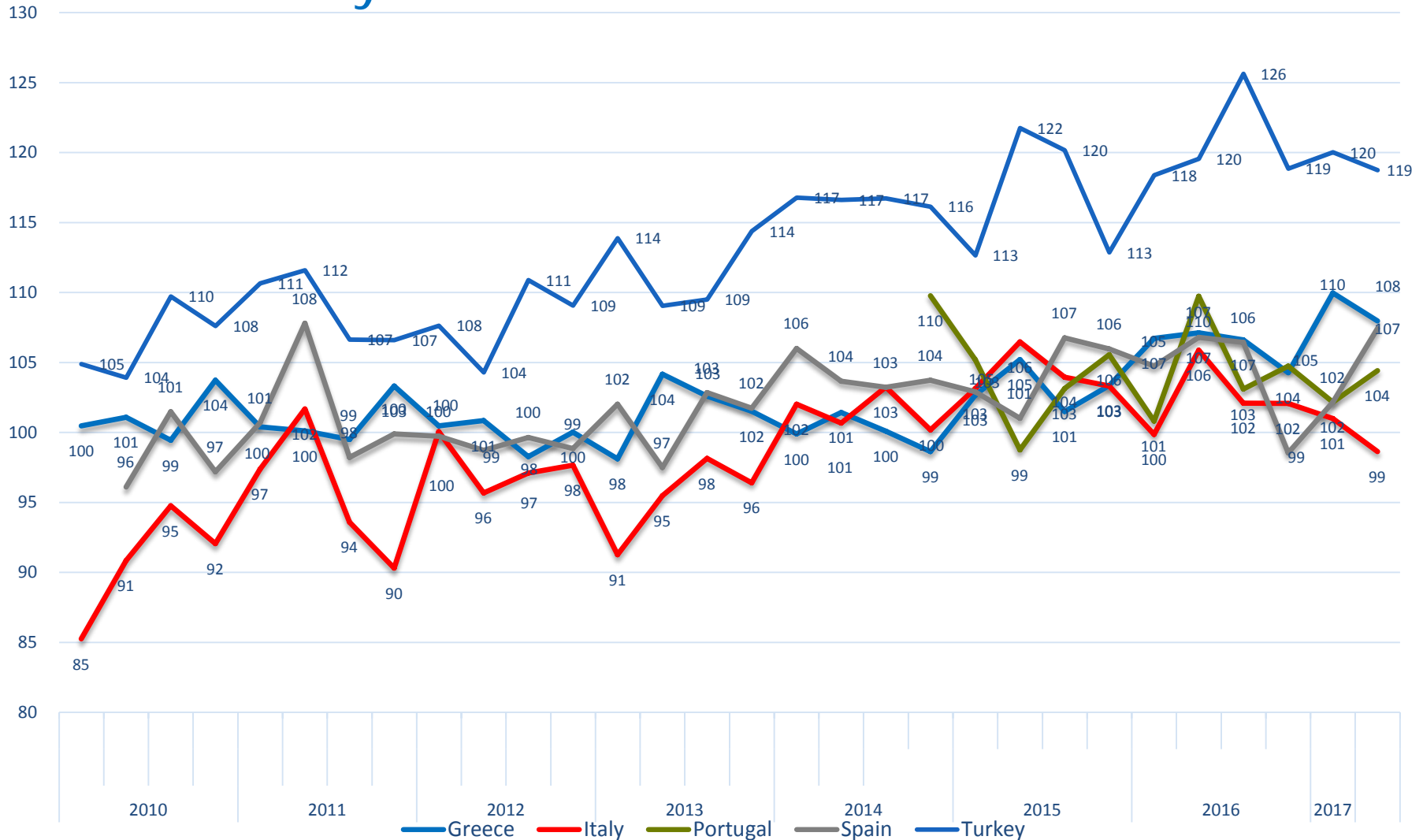
mobility UK +3 and Germany +2; France -5, Austria -4 and Switzerland -3



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 Spain +5 and Portugal +2; Greece -2, Italy -2 and Turkey -1



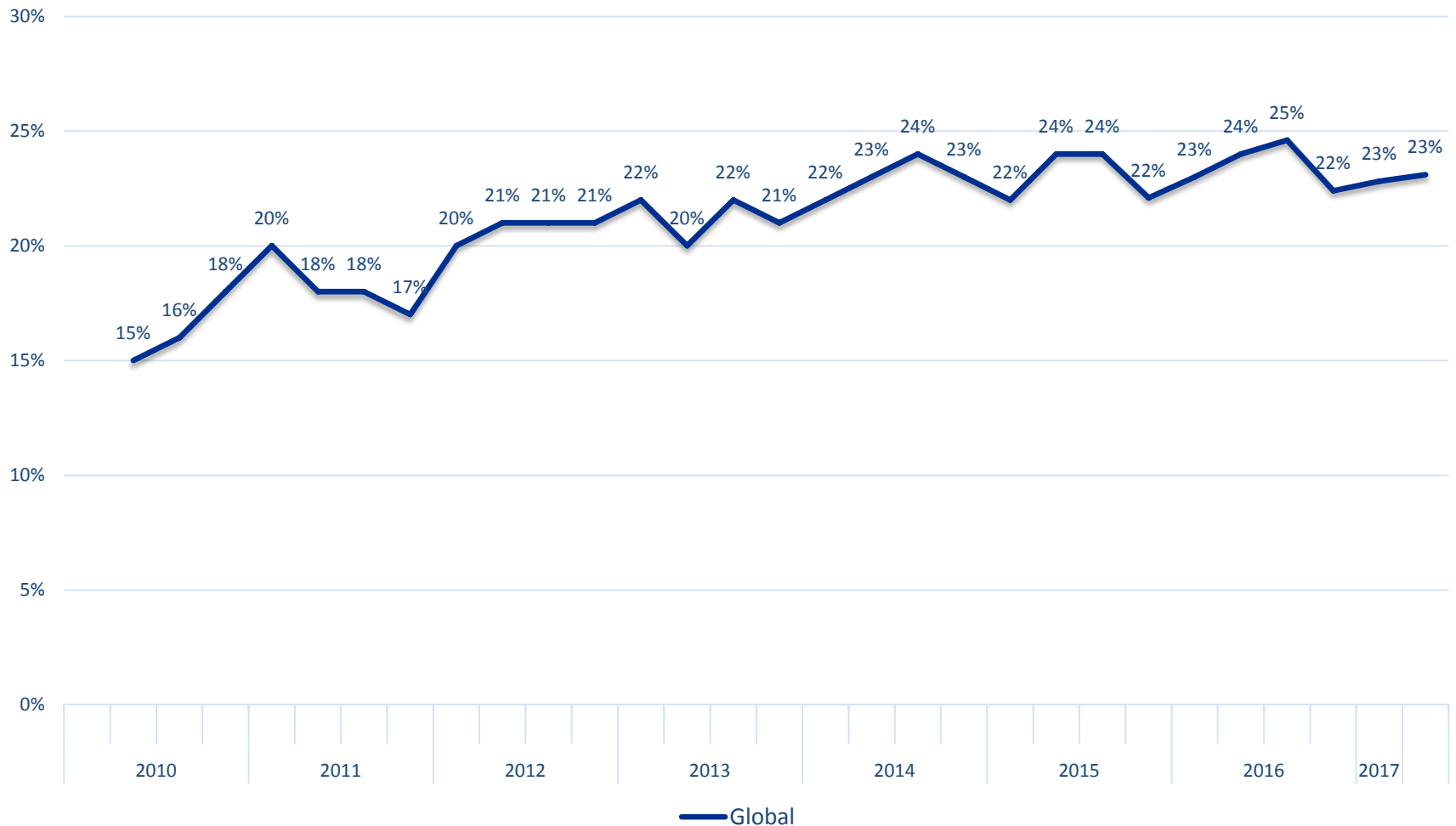
Question:

- 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?

Randstad Workmonitor 2017 - Q2 - June 2017

actual job change

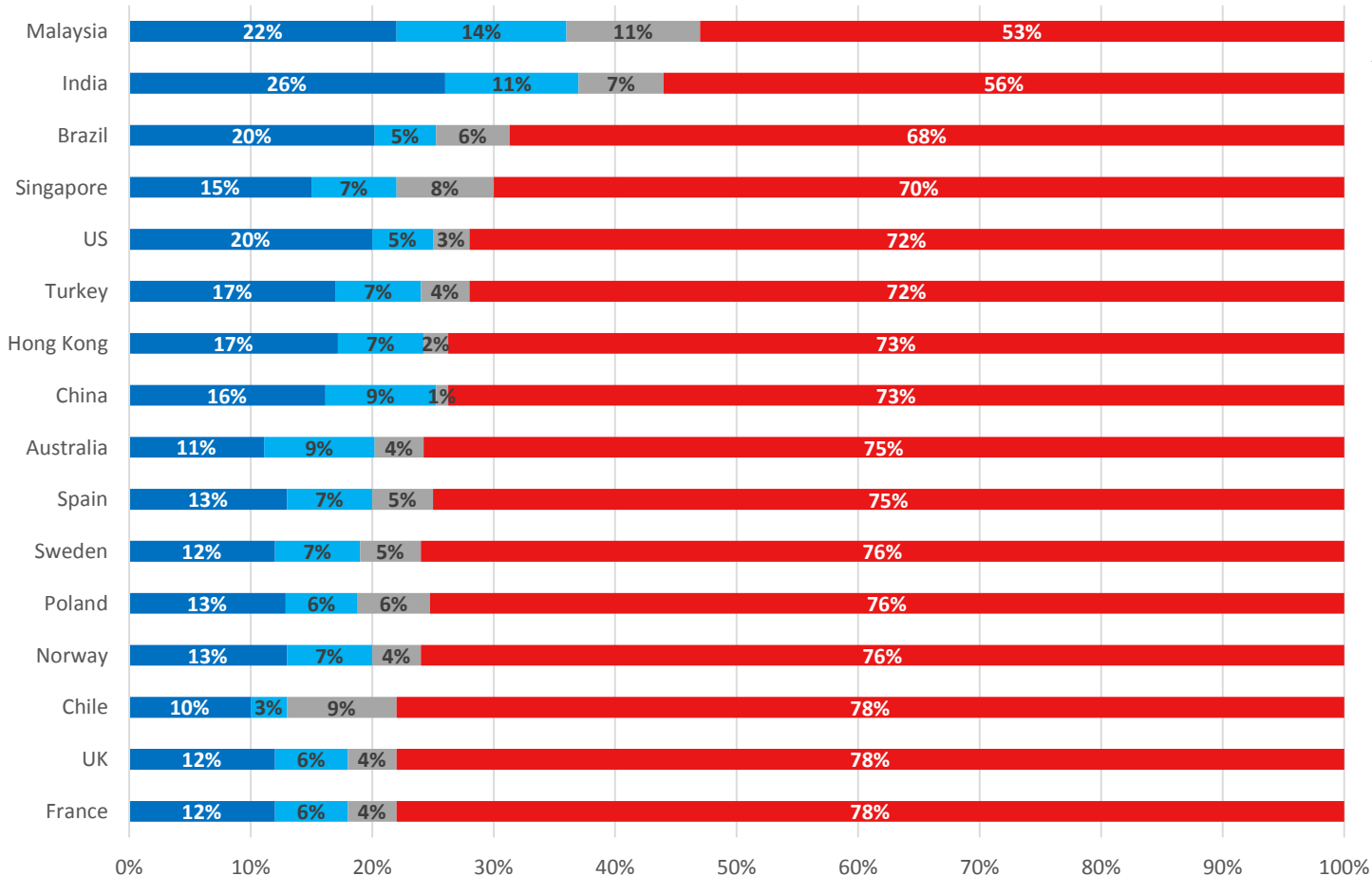
actual job change tends to increase slightly



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 Malaysia and India



Job change increased in Brazil, Poland, Spain and Turkey compared to last quarter.

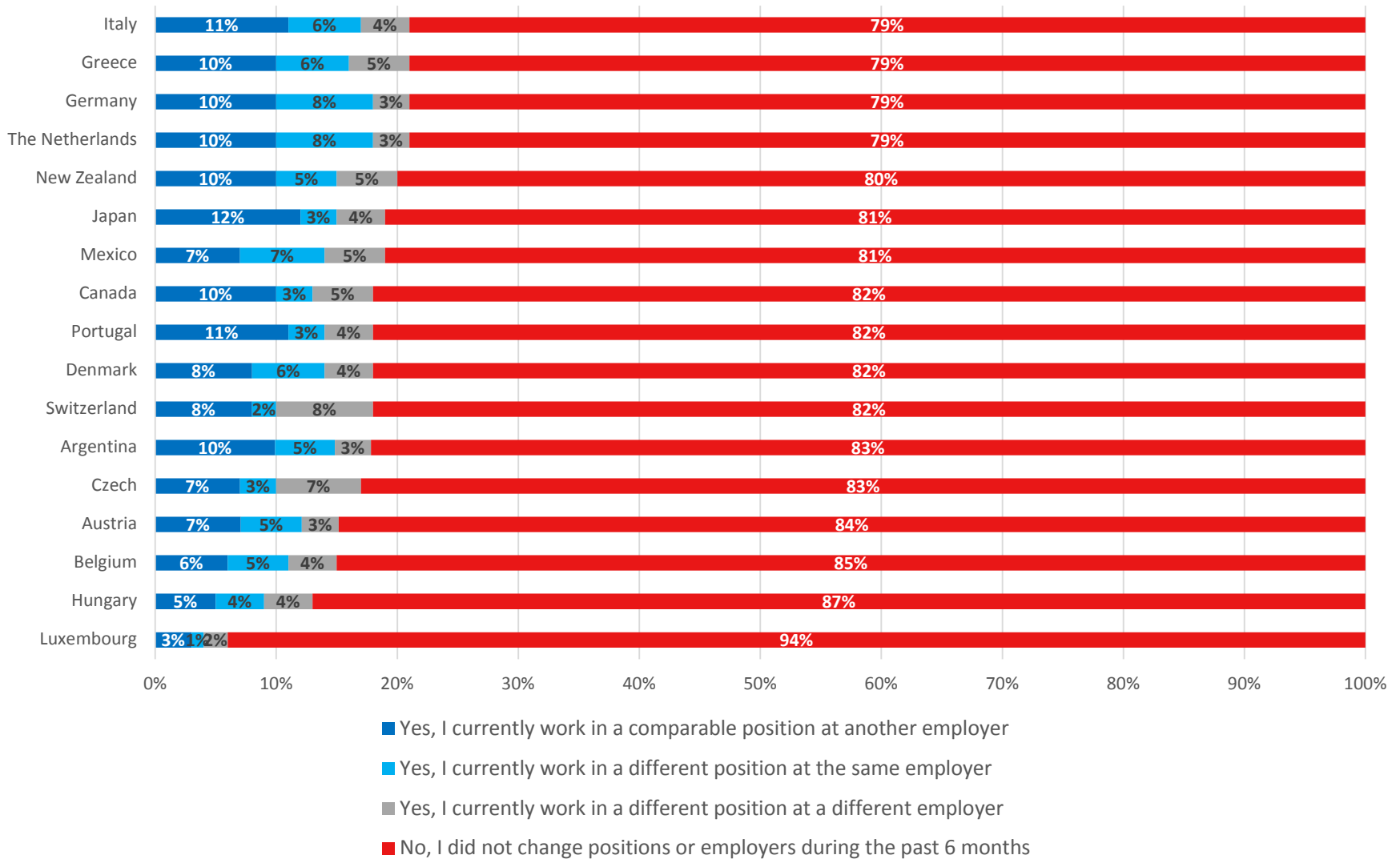
In Hong Kong and India the job change decreased compared to last quarter.

- 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

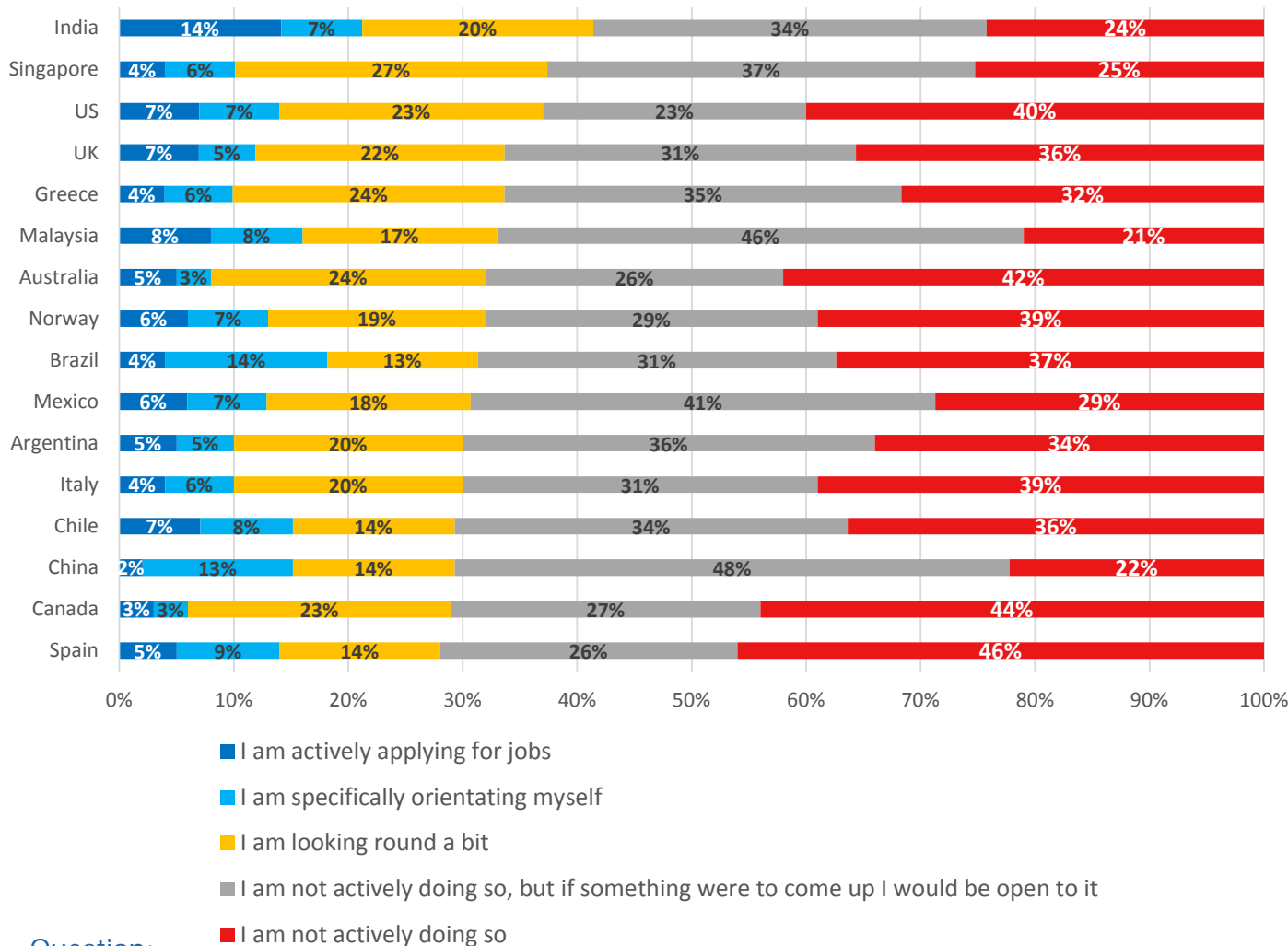


Question:

Have you changed jobs during the past six months?

job change appetite

India has highest appetite for job change



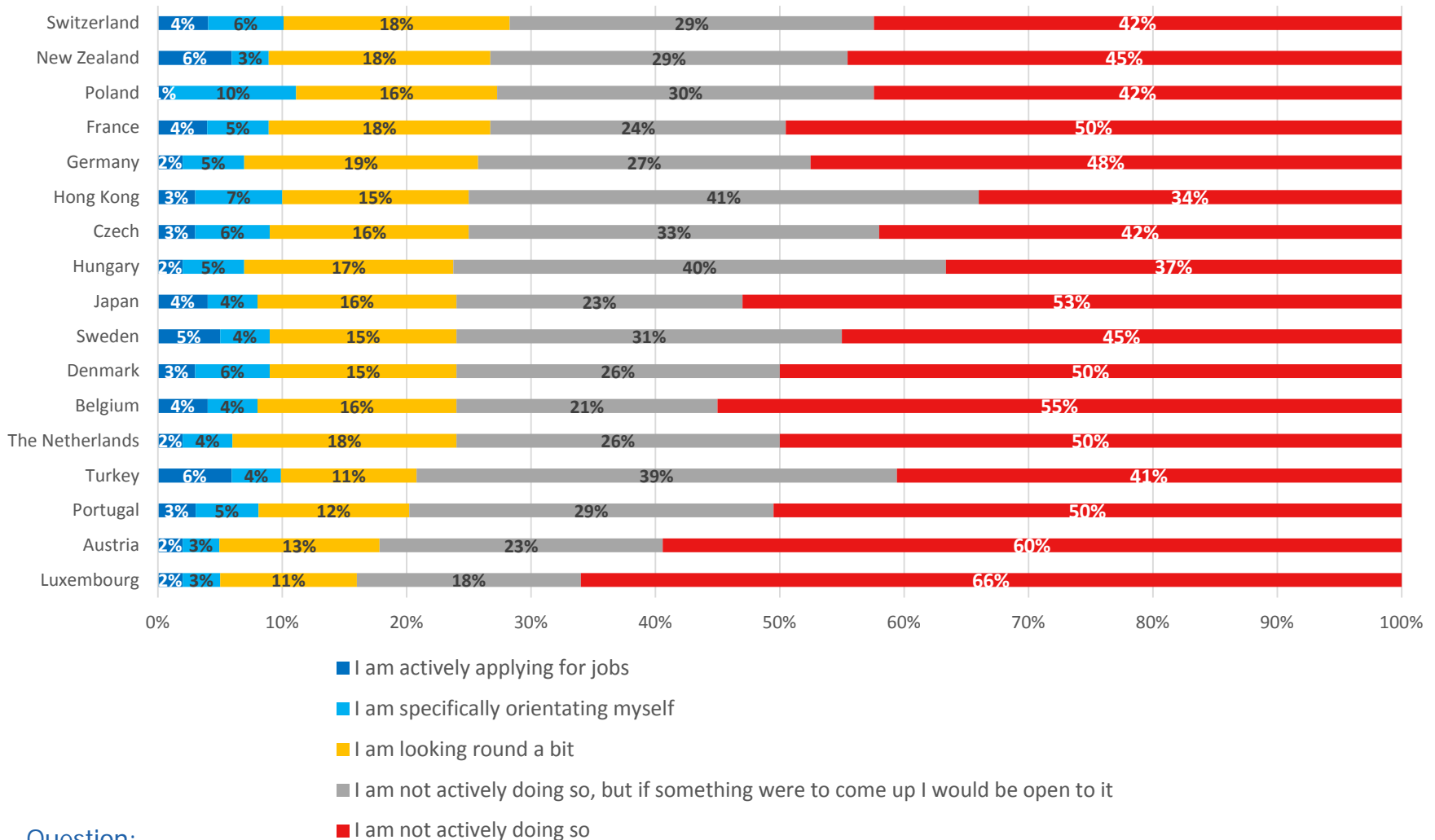
Compared to last quarter, the job appetite increased in Brazil, Czech Republic and Norway.

Germany, Hong Kong, Italy, Poland and the Netherlands show a decrease in appetite compared to last quarter.

Question:

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

lowest appetite for job change in Luxembourg and Austria

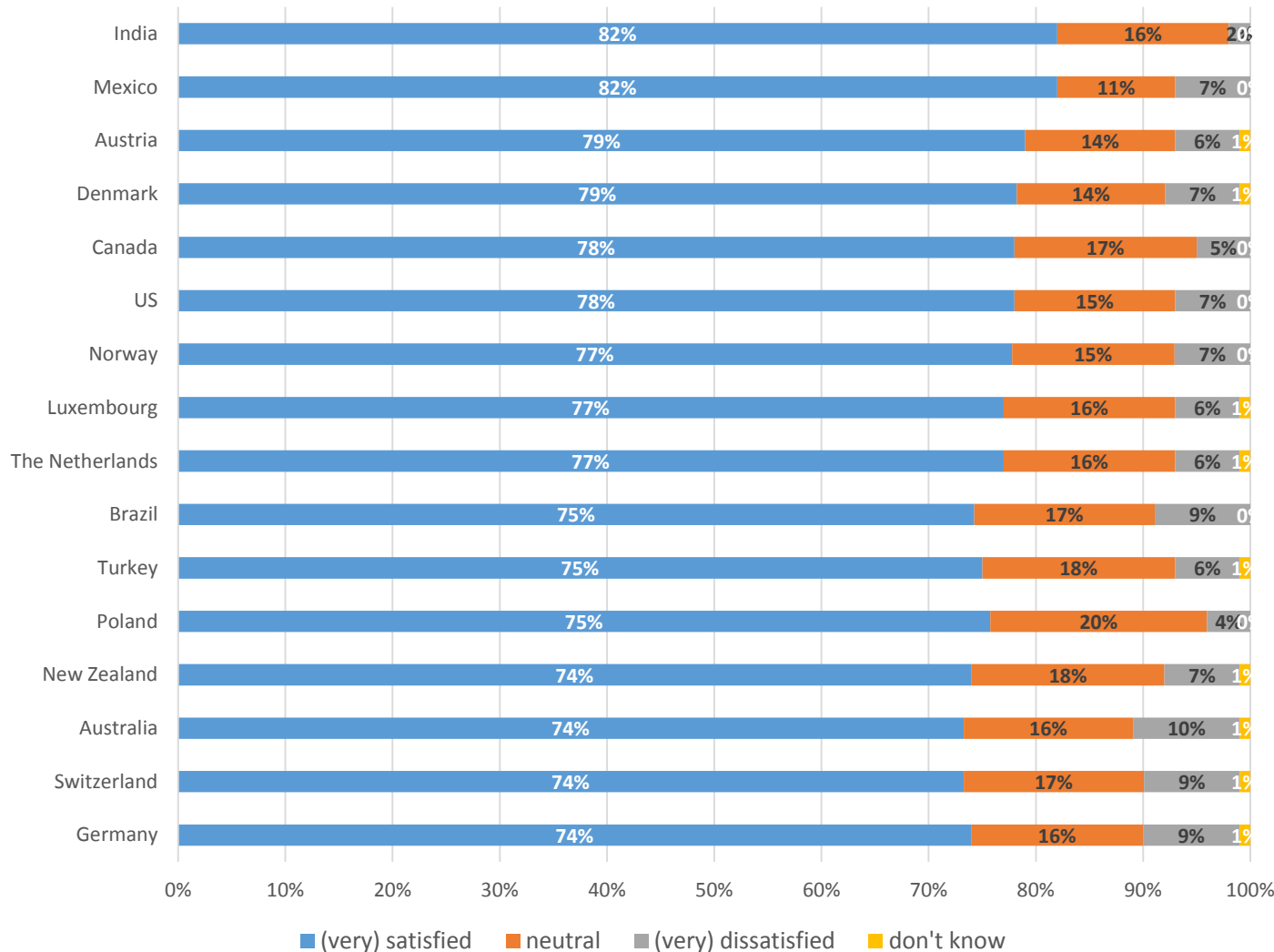


Question:

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

job satisfaction

job satisfaction is highest in India and Mexico



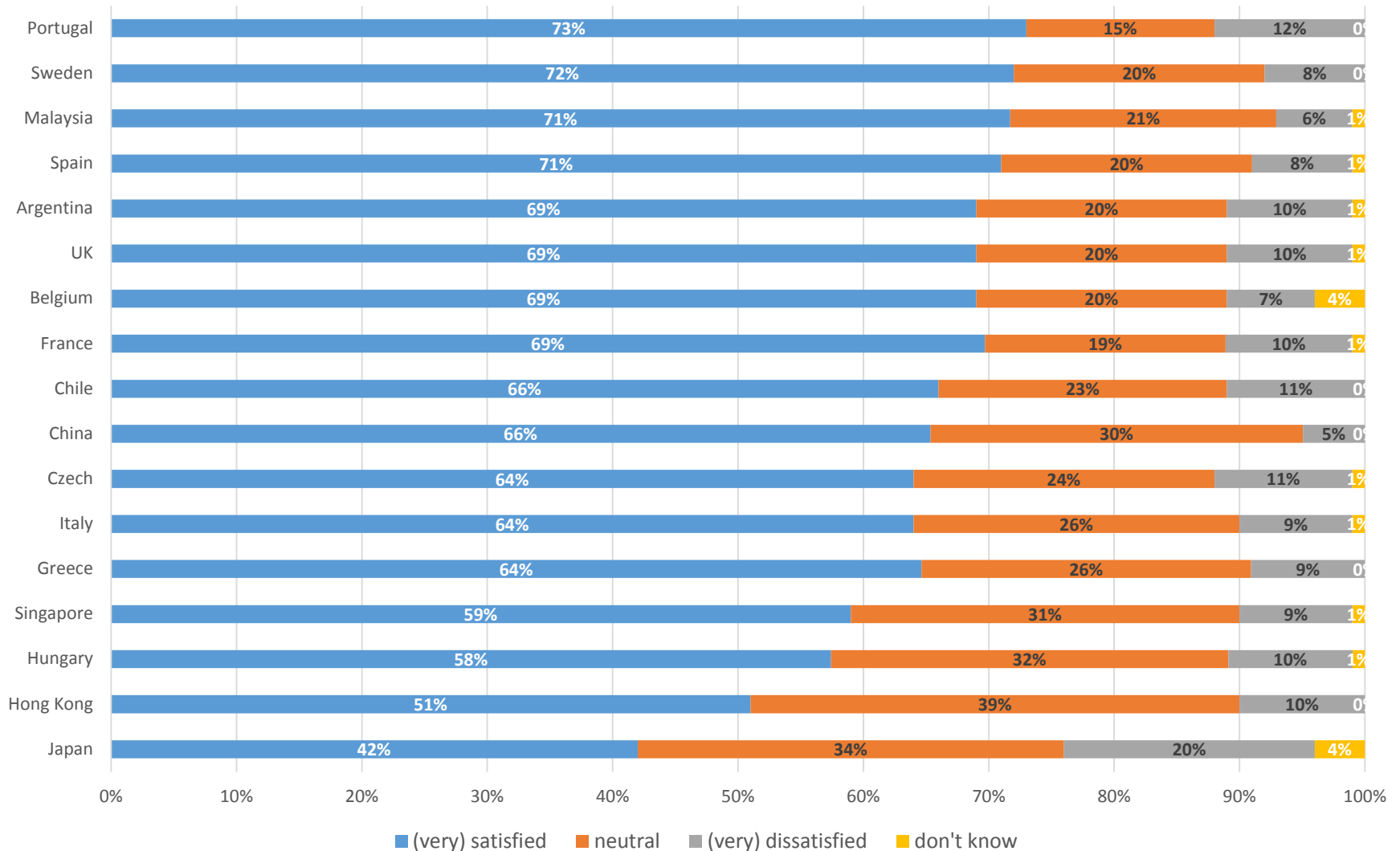
Compared to last quarter, the job satisfaction increased in China, Sweden and Germany.

The job satisfaction decreased in Hungary, Japan, Portugal, Switzerland and US.

Question:

- 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 the Randstad Workmonitor (1)

- The Randstad Workmonitor was launched in the Netherlands in 2003, then in Germany, and covers 33 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). The minimum sample size is 400 interviews per country. The Survey Sampling International (SSI) panel is used for sampling purposes. The second survey of 2017 was conducted from April 20 till May 8, 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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