

opinions on part-time work & gender diversity

Randstad Workmonitor Global Press Report Q3 2011

Randstad Holding nv

August 2011



summary gender differences (1)

mostly men believe working part-time damages career

- worldwide, less than a third of the respondents work part-time. In most countries, there is no difference between the number of male and female employees working part-time. In Singapore, working part-time is more common among male employees.
- overall almost half of the employees feel that working part-time is damaging to their careers. In Argentina, Chile, Denmark, France, Germany, Mexico, The Netherlands, Singapore, Spain, Switzerland, Turkey, UK and US, male employees more often than female employees believe that working part-time is damaging careers.
- in Luxembourg and Switzerland, female employees more often than male employees believe that working part-time is definitely possible in a management position. Exceptions are Greece and Hungary. In these countries more male than female employees believe this.

summary gender differences (2)

- in Australia, Canada, Denmark, India, Netherlands, New Zealand, Norway and Sweden, female employees more often acknowledge that their employer facilitates employees wishing to work part-time. In Spain, male employees more often believe this.

employees prefer to cooperate with the other sex

- female employees more often prefer to work with men and male employees more often prefer to work with women. In Greece, India, Japan and Singapore male and female employees do not differ in their preference for a male or female colleague.

top of the organization mostly run by men

- worldwide the majority has a male immediate superior. In most countries male employees more often indicate that they have a male superior. In Mexico and India, however, female employees more often indicate that their immediate superior is a man.

summary gender differences (3)

- a minority believes that the performance of their organization would improve if they had more women in higher management. In Argentina, Greece, India, Luxembourg and Slovakia, female employees more often share this opinion. In France male employees more often believe in the positive impact of women in higher management.
- employees would rather have a man as their superior. In Luxembourg, Singapore and US male employees more often than female employees state that they would rather have a man as their manager. In Belgium, Chile, China, France, Italy, Mexico, Norway, Poland, Spain and Switzerland, male employees more often prefer a woman as manager than female employees do.
- in Germany, Luxembourg, Slovakia, Sweden and Turkey, female employees more often believe that their organization performs best when there is an equal ratio of men to women in the teams.
- exceptions to this are France and US where male employees more often believe that an equal ratio of men to women would positively influence performance.

summary gender differences (4)

recruitment of men and women

- in many countries (Belgium, Canada, Chile, Denmark, France, India, Italy and Mexico), male employees more often than female employees state that even when there are equally suitable male and female candidates, their employer tends to choose a man, regardless of the current ratio of men to women.
- male employees in Australia, Chile, Denmark, France, Germany, Greece, Luxembourg, Mexico, New Zealand, Norway, Spain, Switzerland, Turkey, UK and US also more often state that their employer takes into account the current number of men and women in higher management in their organization when looking for new managers.

mobility, satisfaction & personal motivation (1)

on average, level of confidence stable

- Indian, Chinese and Mexican employees are most confident about finding another job. In Luxembourg and New Zealand, there has been a boost in confidence this quarter.
- in China, the fear of job loss has increased significantly in the past 3 months. In Switzerland, many employees are less fearful than 3 months ago.

Mobility Index drops to 103

- compared with Q2 2011, the Mobility Index has declined from 106 to 103. Fewer employees worldwide expect to be employed elsewhere in the coming 6 months. However, no dramatic changes have occurred in job searching, trust and fear of job loss in the past 3 months.

mobility, satisfaction & personal motivation (2)

Swiss job market stabilizing

- Swiss employees seem less fearful of losing their job than 3 months ago and the Swiss Mobility Index has significantly declined (-13!) in the last quarter. Fewer Swiss expect to be working somewhere else in the coming six months.

Mobility Index movements

- besides Switzerland, the Mobility Index of Belgium (-13), Spain, Canada, Italy, France, Mexico, UK, Sweden and Australia has declined. For New Zealand, Chile and Slovakia, the Mobility Index has increased.

worldwide no changes in intensity job search

- in New Zealand, employees are more actively looking for a new job (+7%). Swedish employees are most actively looking for a new job (27% actively compared to 11% worldwide)

mobility, satisfaction & personal motivation (3)

Norway, Mexico and Canada 'very satisfied'

- in Europe, satisfaction with the current employer has remained the same over the last three months. Norwegian employees are in the lead with 81%
- compared to 3 months ago, the satisfaction of Mexican and Chinese employees has declined, although Mexico still ranks high with 79%; as well as Canada with 78%
- Japan (39%) and Hungary (48%) have the least satisfied employees

India, Mexico and Italy most ambitious employees

- in Europe, employees in the Nordics are the least focused on getting a promotion (36 to 39%); and in Italy the most (83%)
- outside Europe, the most ambitious employees can be found in Mexico (85%) and India (88%) and the least in Japan (44%).
- employees in Argentina are less focused on getting promotion than three months ago

background Randstad Workmonitor (1)

- after successfully introducing the Workmonitor in the Netherlands in 2003 and more recently in Germany, the survey now covers 29 countries around the world. The study encompasses Europe, Asia Pacific and the Americas. The Randstad Workmonitor is published four 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 six months, provides a comprehensive understanding of sentiments and trends in the job market. In addition to mobility, employee satisfaction and personal motivation as well as a rotating set of themed questions are part of the survey.

background 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 third wave of 2011 was conducted between 18 July and 8 August, 2011 in the following countries:

Argentina	China	Greece	Luxembourg	Singapore	The Netherlands
Australia	Czech Republic	Hungary	Mexico	Slovakia	Turkey
Belgium	Denmark	India	New Zealand	Spain	UK
Canada	France	Italy	Norway	Sweden	USA
Chile	Germany	Japan	Poland	Switzerland	

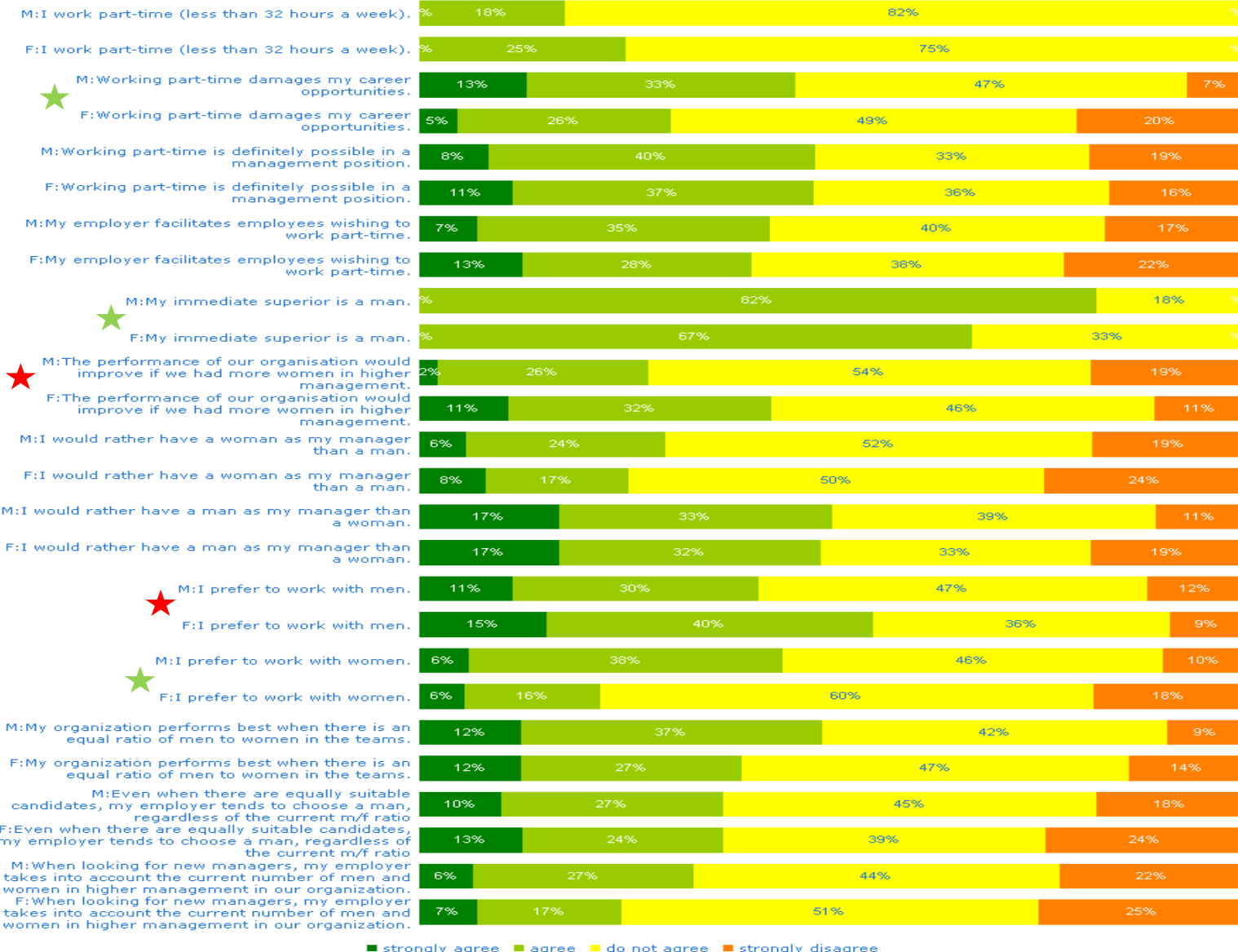
index

- Chapter 1: Gender
- Chapter 2: mobility
- Chapter 3: satisfaction
- Chapter 4: personal motivation

Argentina



Press statements



■ strongly agree
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★ = male employees agree more than female employees

★ = female employees agree more than male employees

(% strongly agree +disagree)

- According to 46% of Argentinean male employees, working part-time would damage career opportunities. Female employees agree less on this (30%).

- Male employees more often have a male superior than female employees (82% vs. 67%).

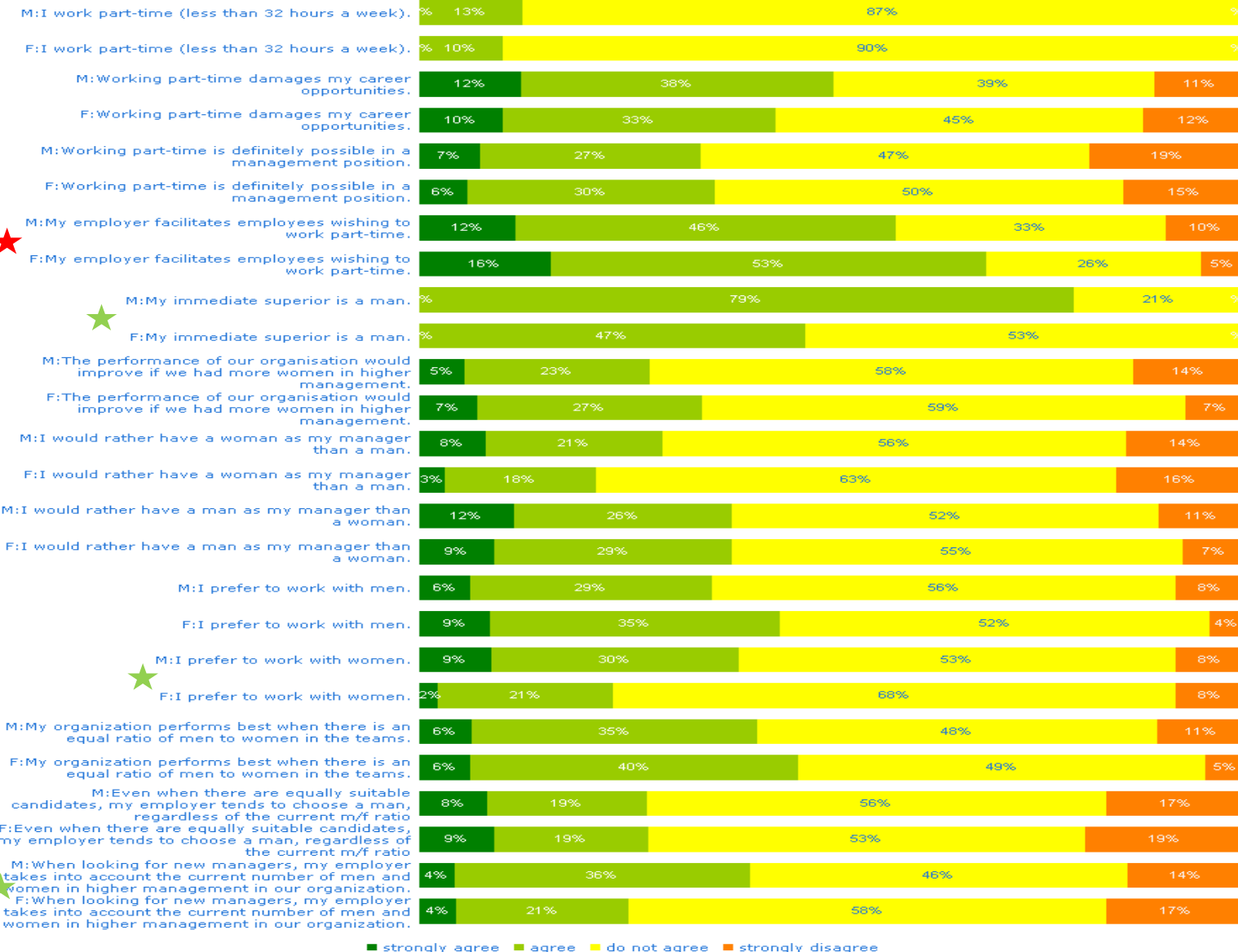
- 43% of the female employees versus 28% of male employees think that more women in higher management would improve the performance of the organization.

- Female employees more often prefer to work with men than male employees (55% vs. 41%). Male employees more often prefer to work with women (36% vs. 22%).

Australia



Press statements



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(% strongly agree +disagree)

- Australian female employees indicate more often than male employees that their employer facilitates employees wishing to work part-time (69% vs. 58%).

- A majority of Australians have a male superior (63%). Male employees more often have a male superior (79%) than female employees (47%).

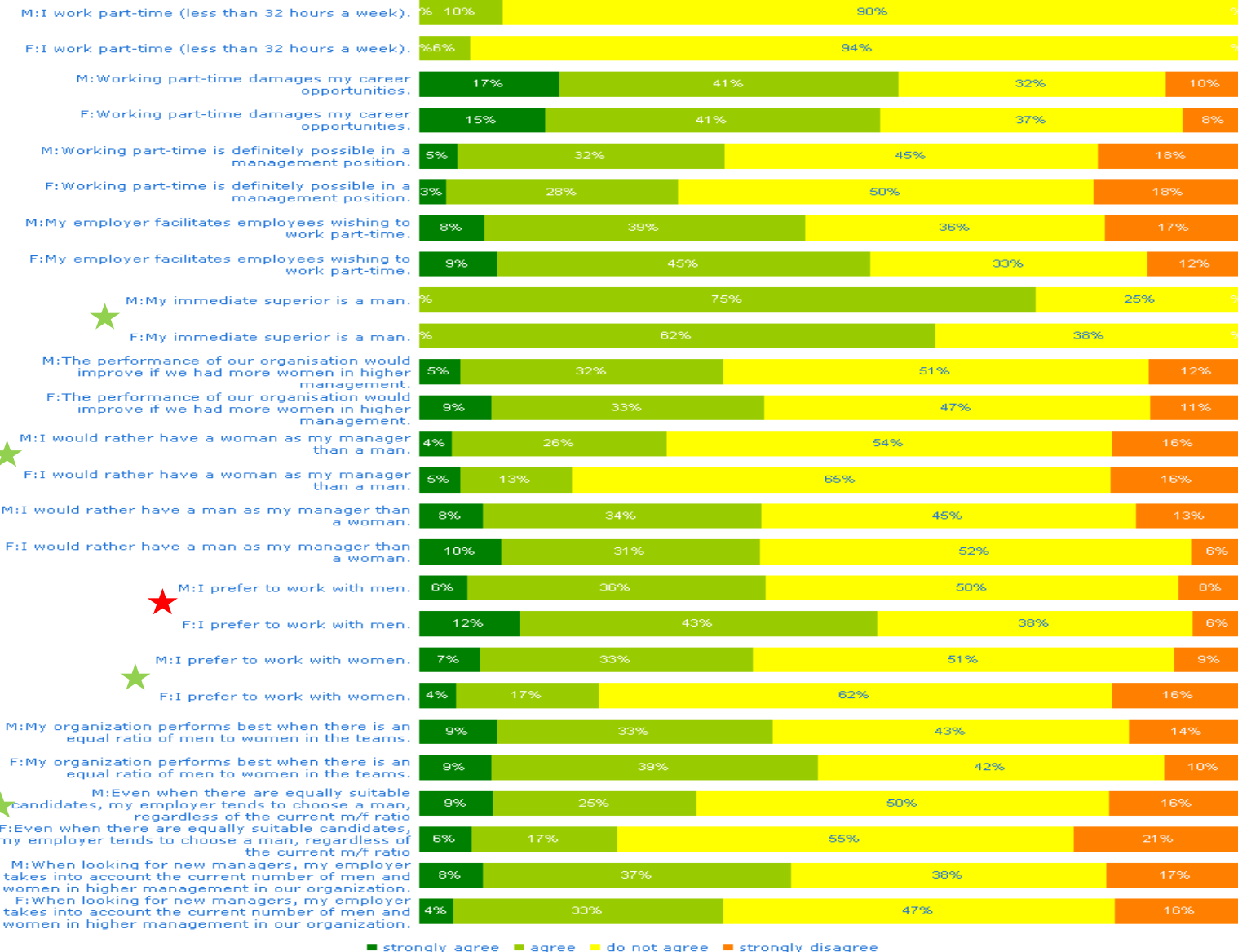
- Male employees more often wish to work with women than female employees (39% vs. 23%).

- Male employees more often indicate that their employer takes the current number of men and women in higher management into account when looking for new managers (40% vs. 25%).

Belgium



Press statements



- Three quarters (75%) of Belgian male employees has a male superior versus 62% of the women.

- Male employees more often prefer a woman as manager than female employees do (30% vs. 18%).

- Female employees more often prefer to work with men (56%), while male employees more often prefer to work with women (40%).

- 34% of male employees versus 23% of female employees indicate that their employer tends to choose a men even when there are equally suitable male and female candidates.

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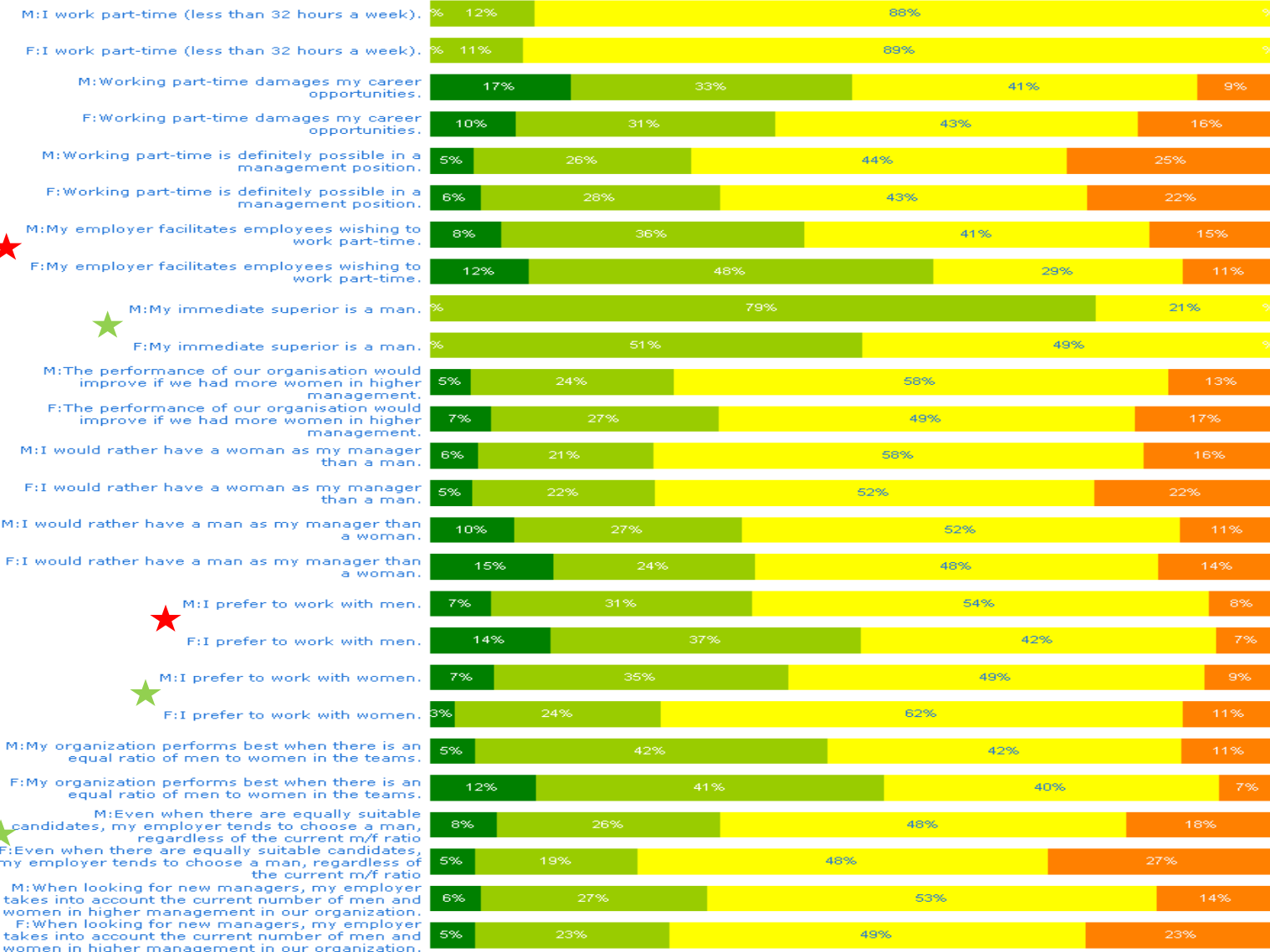
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Press statements



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- Female employees more often than male employees indicate that their employer facilitates employees wishing to work part-time (60% vs. 44%).

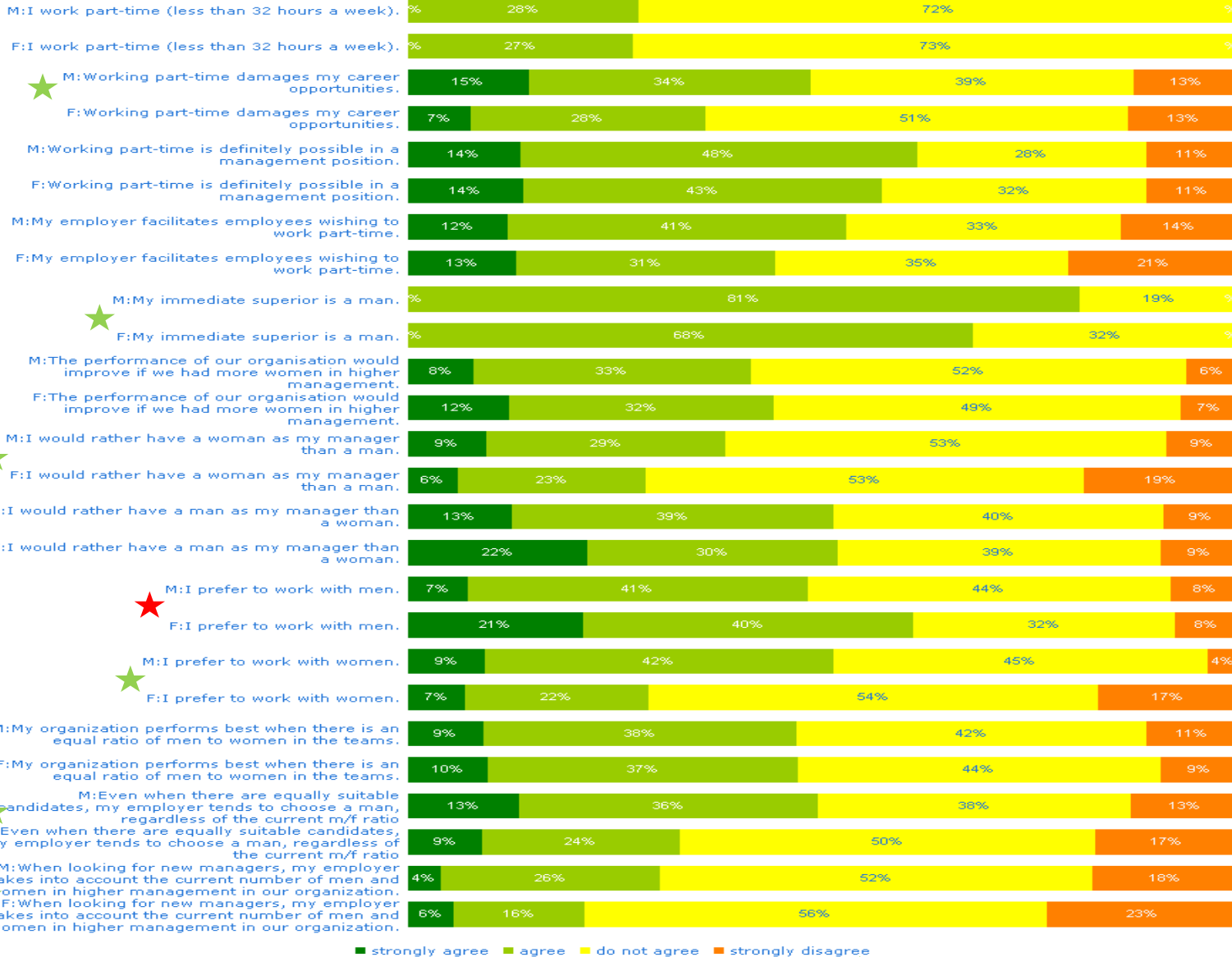
- Male employees more often than female employees have a male superior (79% vs. 51%).

- Working with men is more preferred by female employees (51% vs. 38%). Working with women is preferred by male employees (42% vs. 27%).

- According to 34% of male employees and 25% of female employees, their employer tends to choose a man even when there are equally suitable male and female candidates.



Press statements



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(% strongly agree + disagree)

- In Chile, male employees more often than female employees think that working part-time will damage their career opportunities (49% vs. 33%).

- Male employees more often prefer a woman as manager than female employees do (38% vs. 29%).

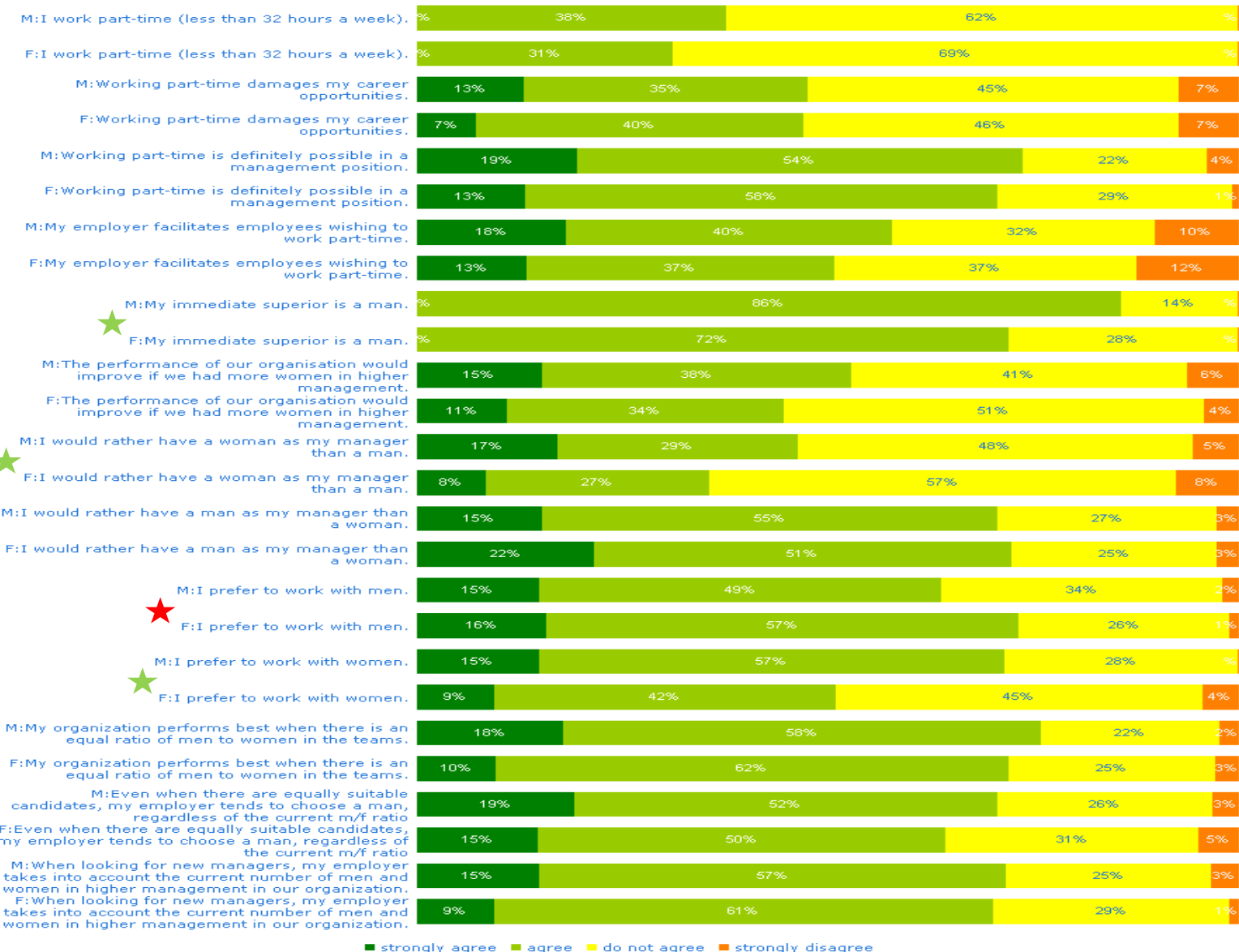
- Male employees also prefer to work with women more than female employees do (51% vs. 29%).

- According to 49% of male employees and 33% of female employees, Chilean employers tend to choose a man even when there are equally suitable male and female candidates.

- Male employees more often indicate that their employer takes the current number of men and women in higher management into account when looking for new managers (30% vs. 22%).



Press statements



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- In China, the immediate superior of male employees is more often a man compared to female employees (72% vs. 86%).

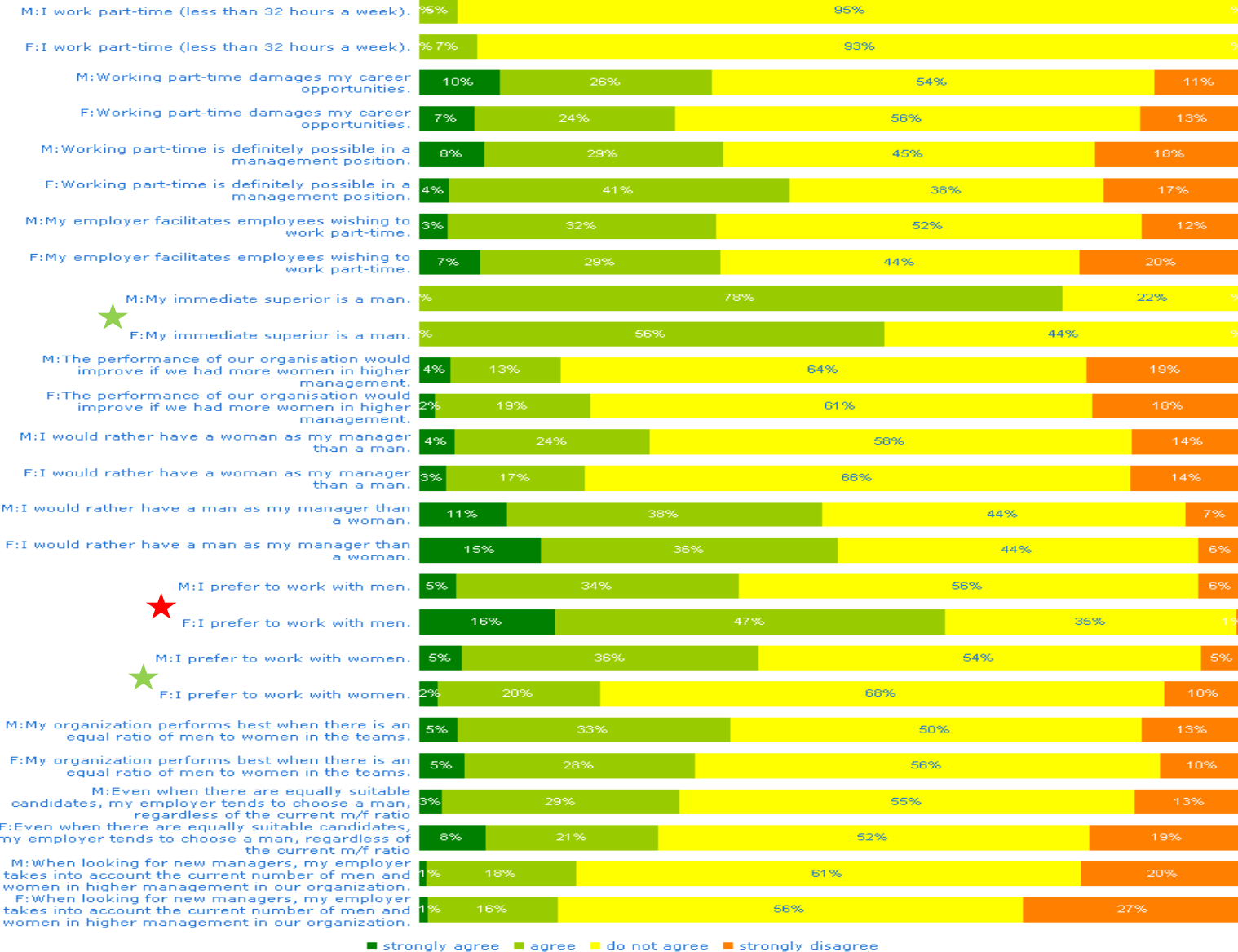
- The preference for a female manager is higher among male employees than among female employees (46% vs. 35%).

- An almost equal percentage of Chinese employees prefer to work with men (68%) than with women (62%). However, working with men is more preferred by female employees and working with women more preferred by male employees

Czech Republic



Press statements



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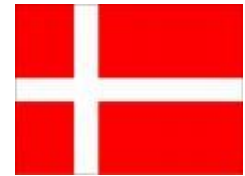
(% strongly agree +disagree)

- Male employees more often than female employees indicate that their immediate superior is a man (78% vs. 56%).

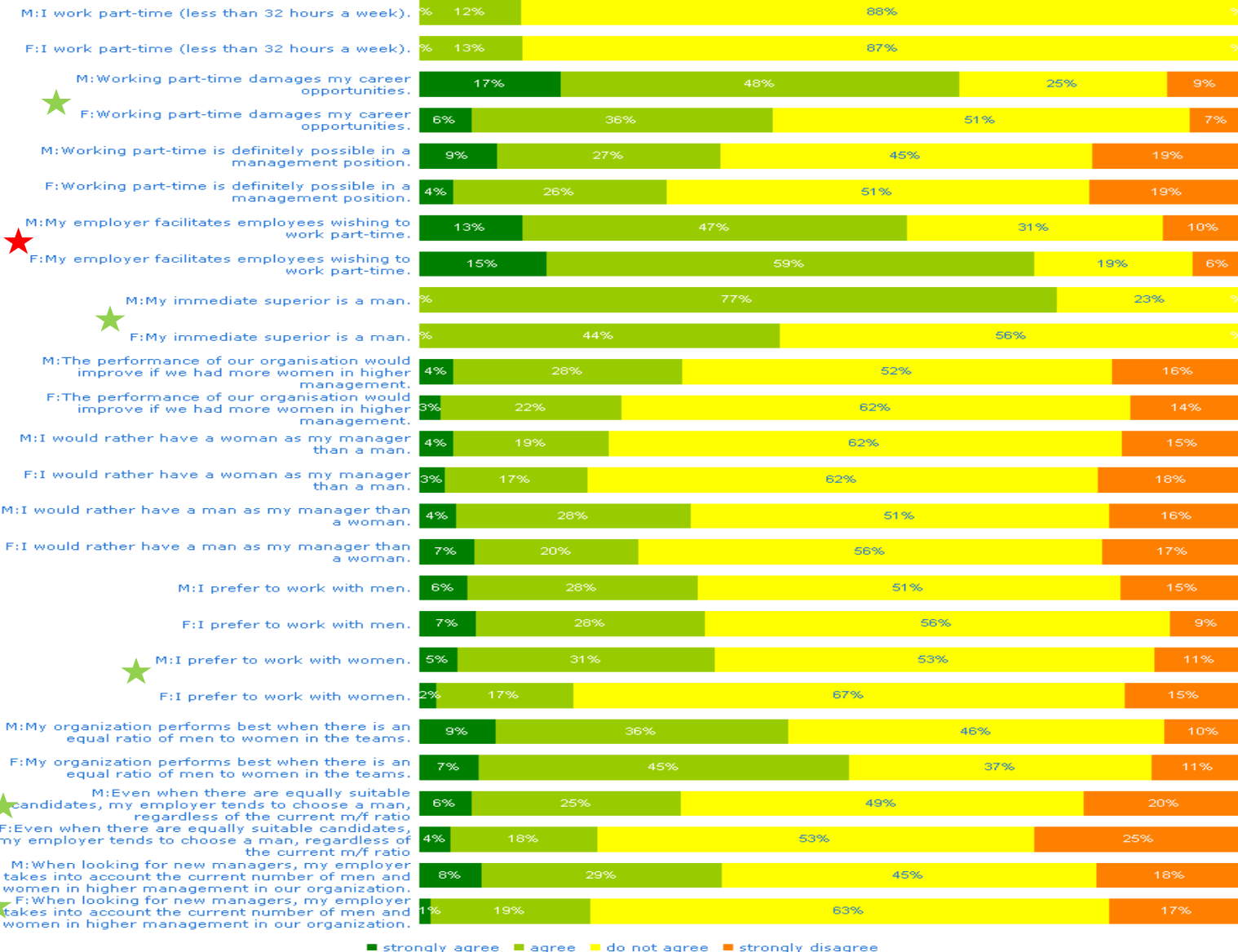
- Female employees more often prefer to work with a man than male employees (63% vs. 39%)

- Although fewer Czech employees (31%) prefer to work with women, the preference for a female colleague is higher among male employees than among female employees (41% vs. 22%).

Denmark



Press statements



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(% strongly agree + disagree)

- A majority (65%) of Danish male employees versus a minority of female employees (42%) believe that working part-time will damage their career opportunities.

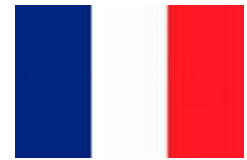
- Employers who facilitate part-time working are more recognized by female than by male employees (74% vs. 50%).

- Having a male immediate superior is more common among male than among female employees (77% vs. 44%).

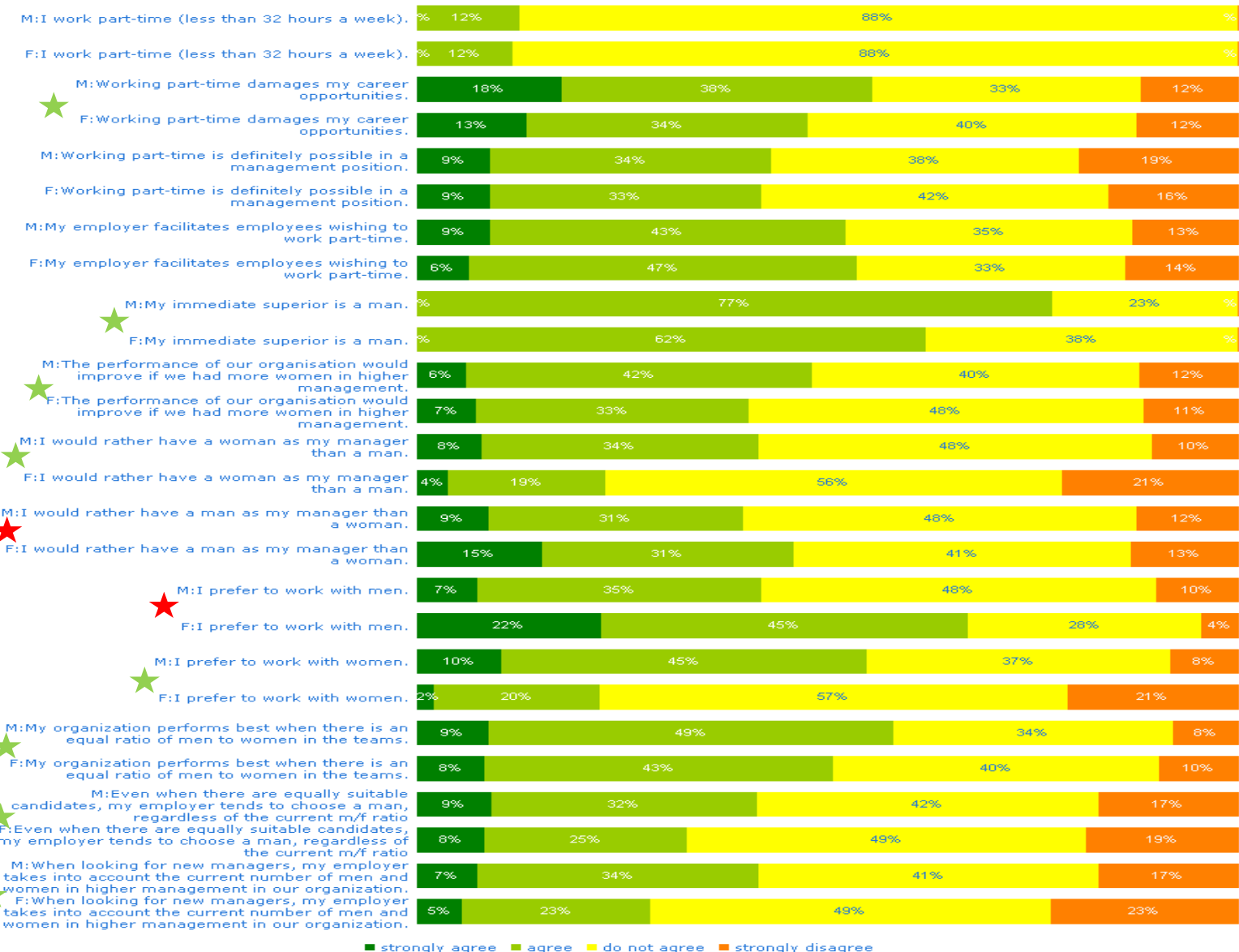
- Compared to female employees, male employees more often think that their employer tends to choose a man, even when there are equally suitable male and female candidates (31% vs. 22%).

- Male employees more often believe that their employer takes into account the current number of men and women in higher management when looking for new managers (37% vs. 20%).

France



Press statements



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(% strongly agree +disagree)

- French male employees more often have a male superior than female employees (77% vs. 62%).

- However, male employees more often acknowledge that the performance of their organization would improve if they had more women in higher management (48% vs. 40%).

- Also, male employees more often prefer to have a female manager. (42% vs. 23%). Female employees would rather have a man as their manager (46% vs. 40%).

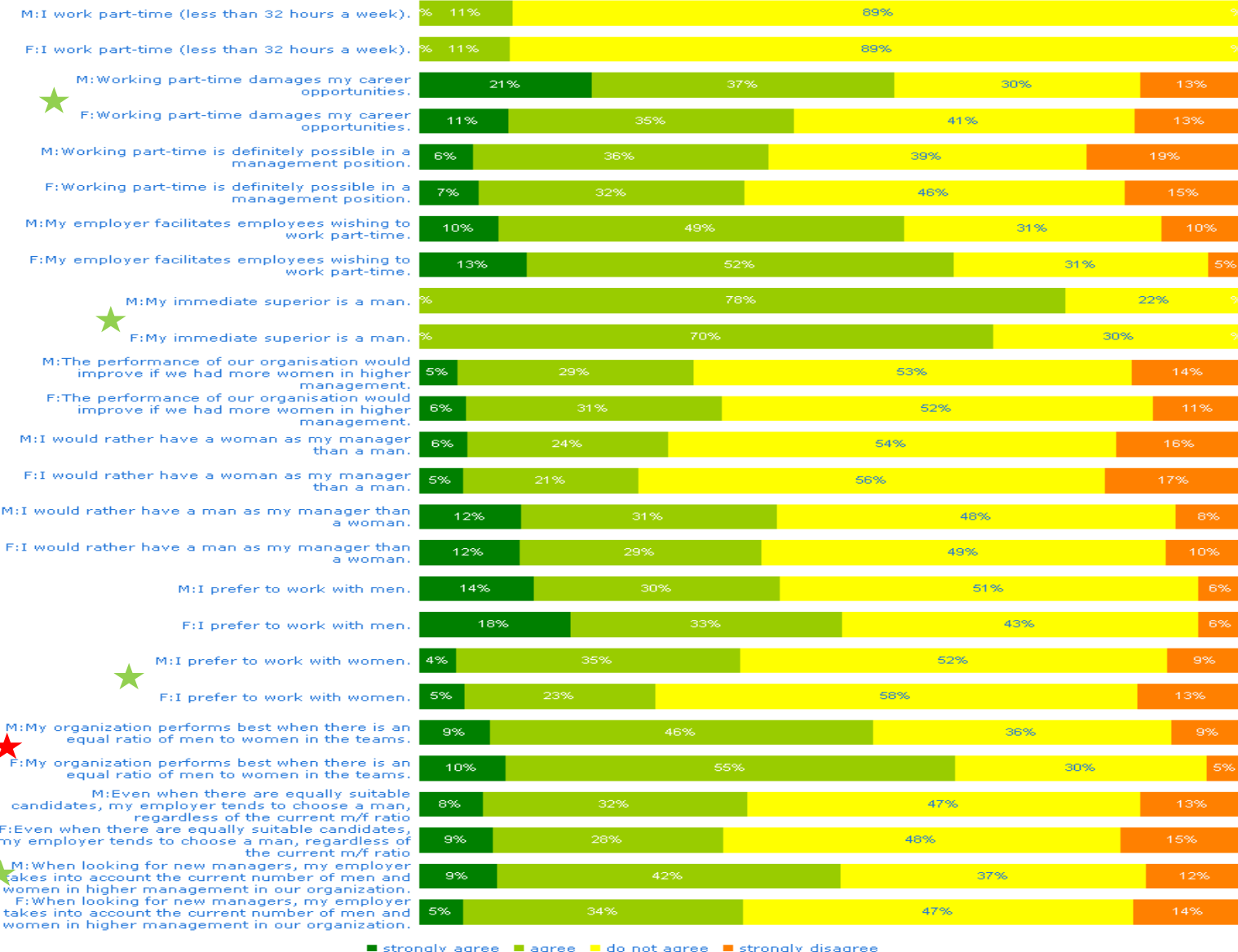
- Likewise, working with a woman is more preferred by men (55% vs. 22%)

- Compared to female employees, male employees more often believe that their organization performs best when there is an equal ratio of men to women in the teams (58% vs. 51%).

Germany



Press statements



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- German male employees more often than female employers believe that working part-time is damaging for their career opportunities (58% vs. 46%).

- A majority of German employees have a male superior, male employees more often than female employees (78% vs. 70%).

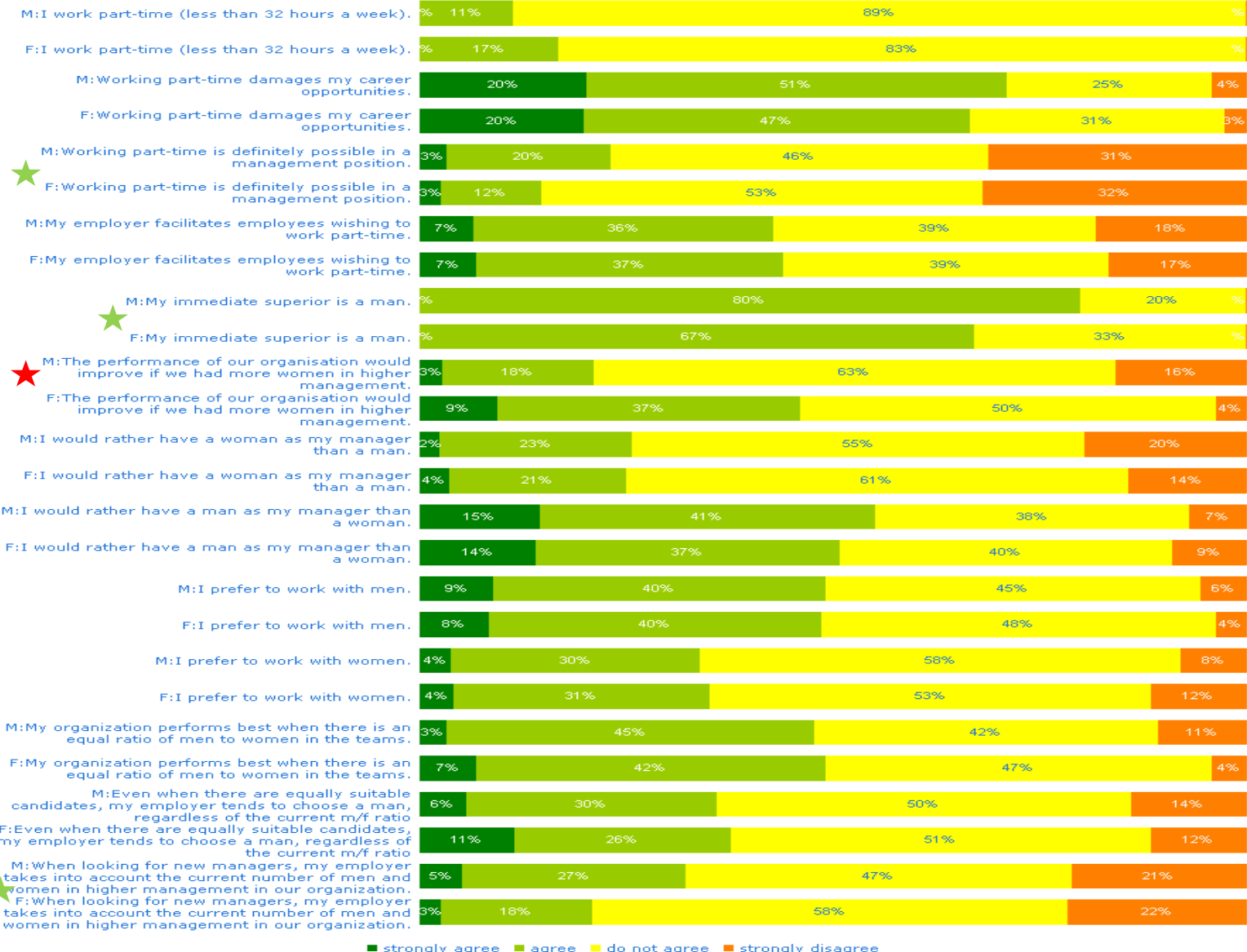
- Male employees prefer to work with women more often than female employees (39% vs. 28%).

- Female employees more often believe that their organization performs best when there is an equal ratio of men to women in the teams (65% vs. 55%).

- Half (51%) of male versus 39% of female employees think that their employer takes into account the current number of men and women in higher management when looking for new managers.



Press statements



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- Although a minority of Greek employees believe that working part-time is definitely possible in a management position, male employees more often believe in this possibility than female employees (23% vs. 15%).

- Greek male employees more often have a male superior compared to female employees (80% vs. 67%).

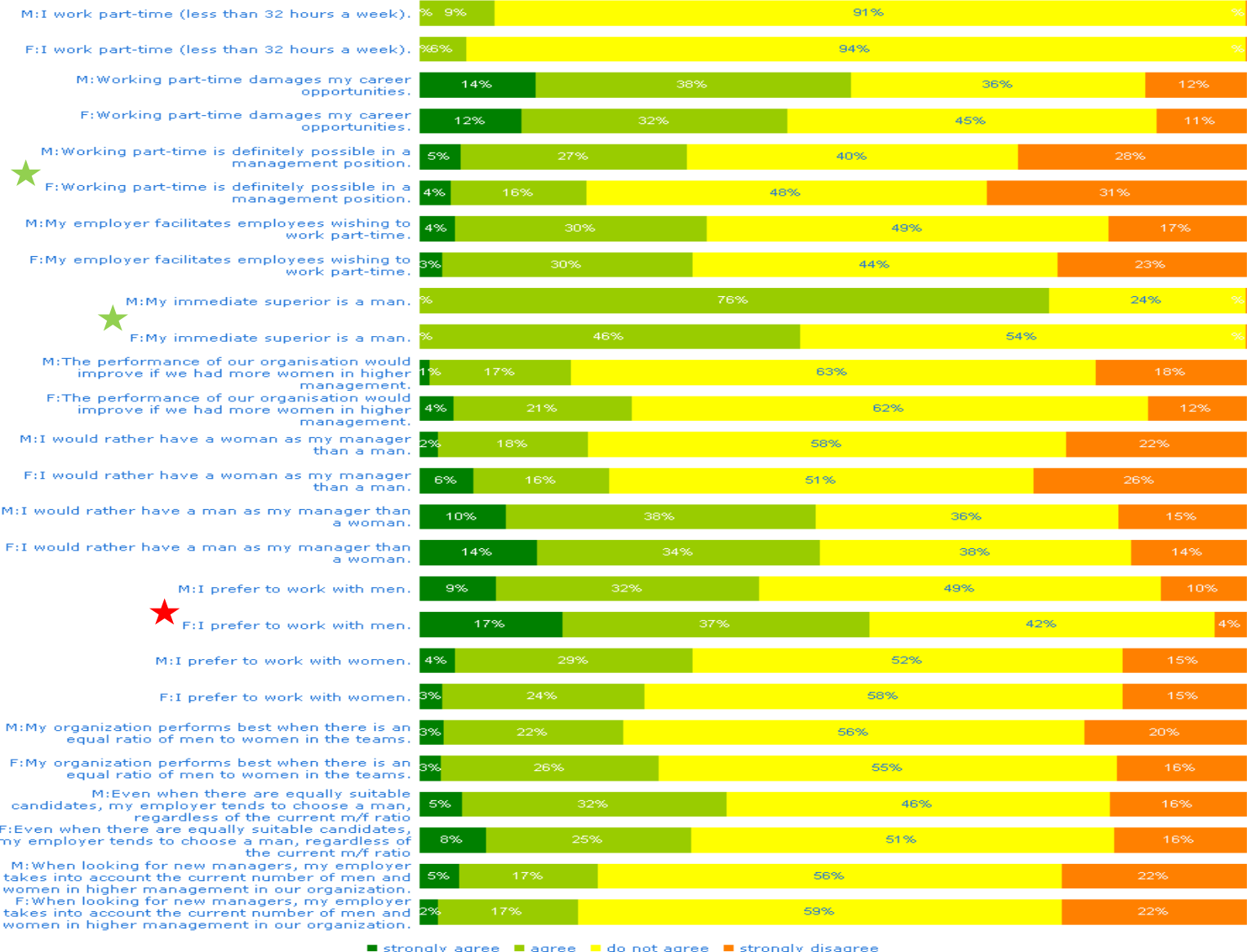
- Female employees more often than male employees believe that the performance of the organization would improve if there were more women in higher management (46% vs. 21%).

- Compared to female employees, male employees more often indicate that their employer takes into account the current number of men and women in higher management when looking for new managers (32% vs. 21%).

Hungary



Press statements



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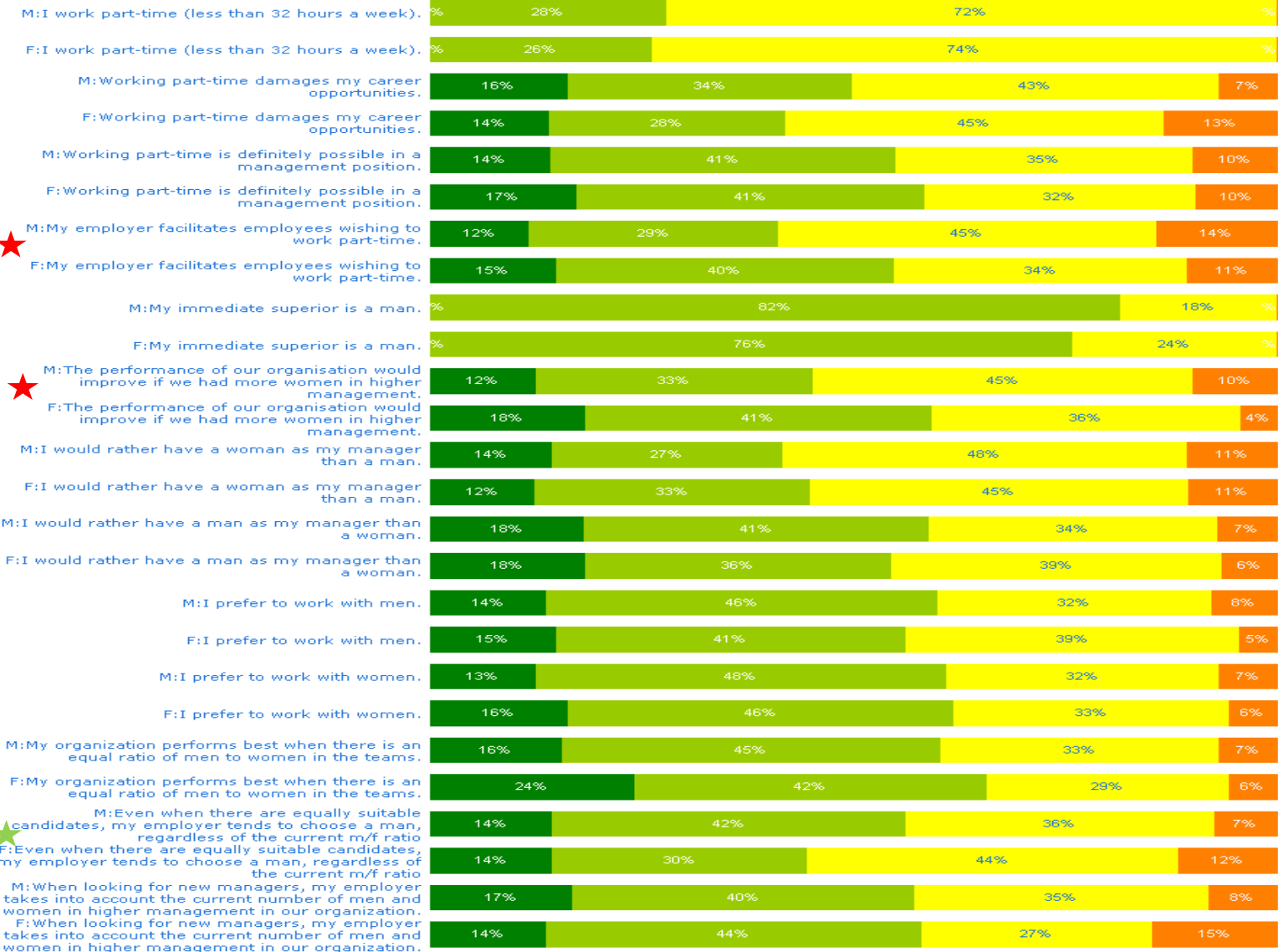
- One third (32%) of Hungarian male employees compared with one fifth (20%) of female employees believe that working part-time is definitely possible in a management position.

- Hungarian male employees more often have a male superior than female employees (76% versus 46%).

- In general, Hungarian employees seem to prefer working with men than working with women. Female employees even more often prefer to have a male colleague (54% vs. 41%).



Press statements



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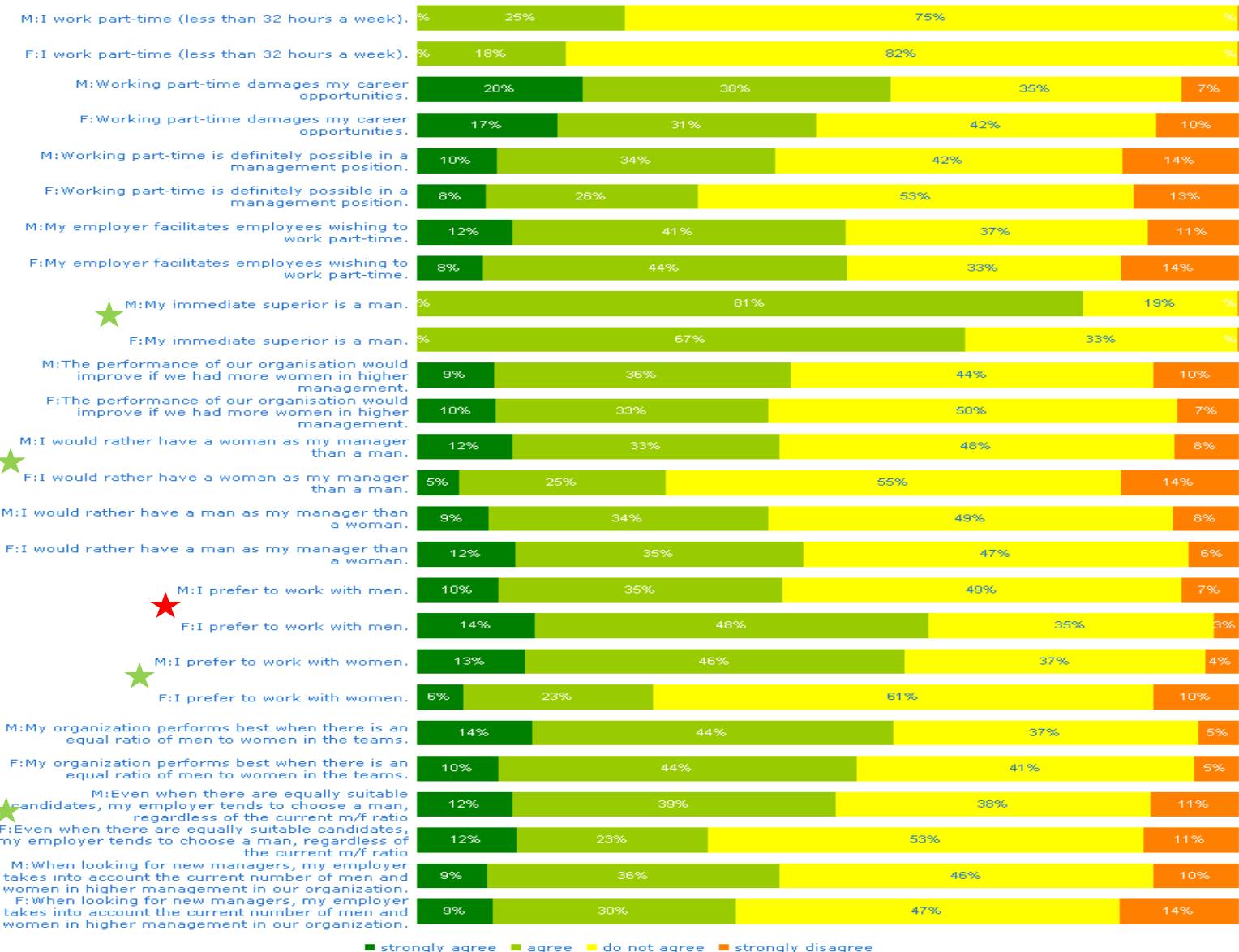
- Female Indian employees more often than male employees acknowledge that their employer facilitates employees who wish to work part-time (55% vs. 41%).

- Female employees more often than male employees believe that more women in higher management would improve the performance of their organization (59% vs. 45%).

- Compared to female employees, male employees more often think that their employer tends to choose a man, even when there are equally suitable male and female candidates (44% vs. 56%).



Press statements



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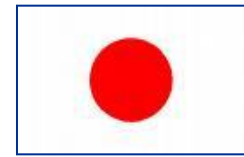
- At the moment, Italian male employees more often have a male superior than female employees (81% vs. 67%).

- However, male employees more often prefer a woman as manager than female employees do (45% vs. 30%).

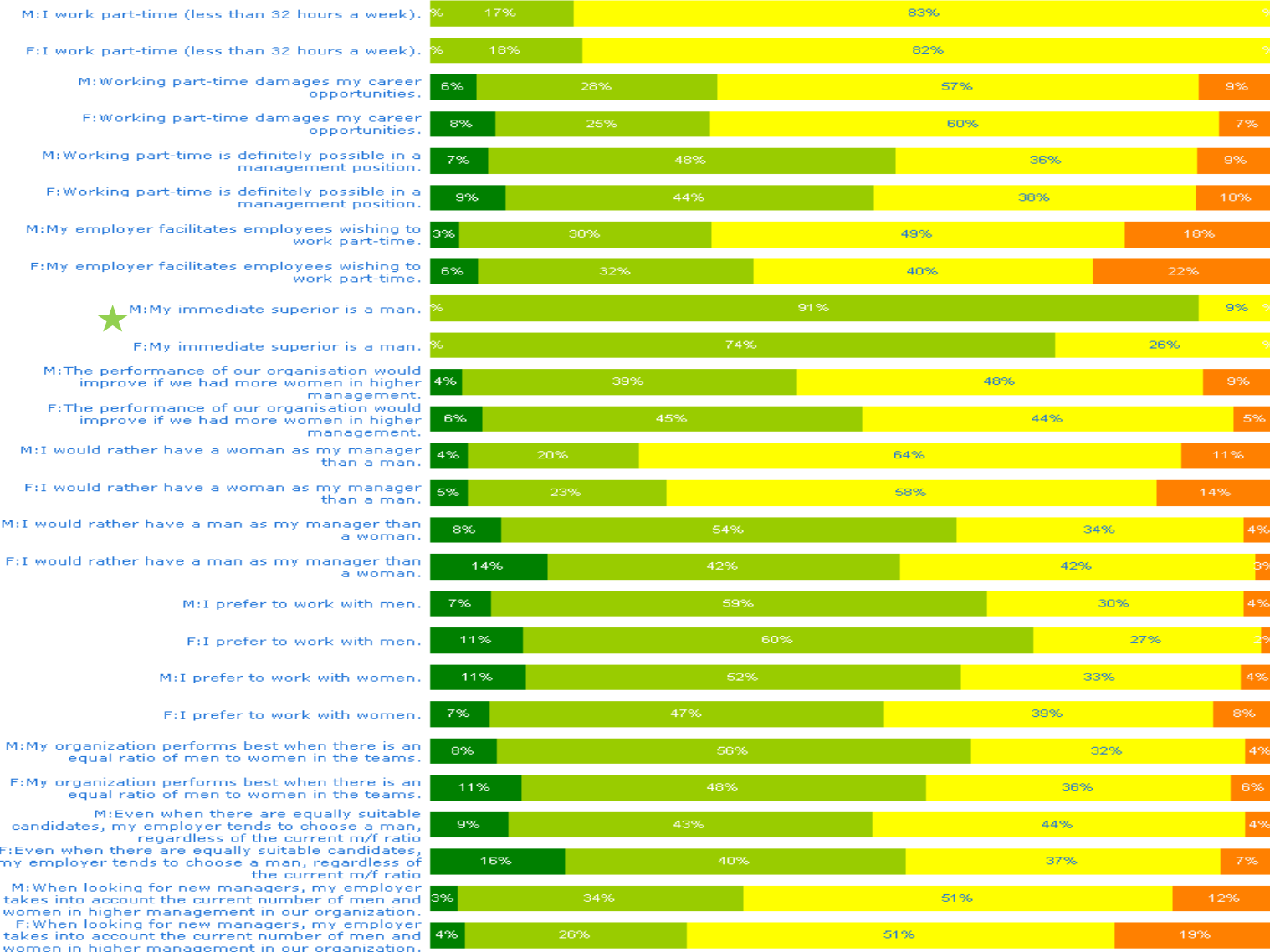
- Female employees prefer to work with men more often than male employees (62% vs. 45%). More male employees prefer to work with women (59% vs. 29%).

- Male employees more often than female employees acknowledge that even when there are equally suitable candidates, their employer tends to choose a man.

Japan



Press statements



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(% strongly agree +disagree)

• In Japan, 91% of male employees have a man as their immediate superior. Three quarters of female employees have a male superior.

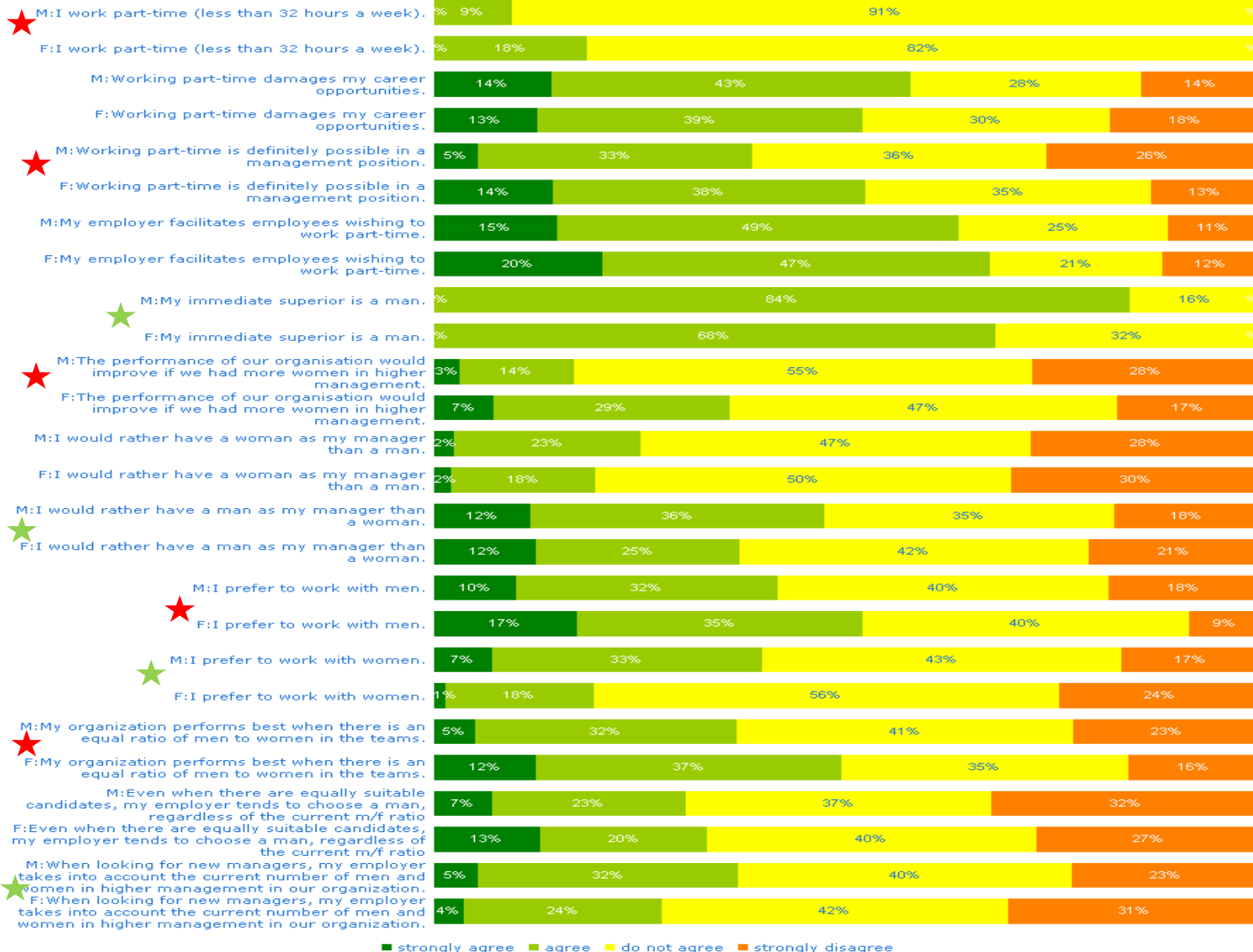
• A majority of Japanese employees do not believe that working part-time is damaging for career opportunities (66%)

• 36% of Japanese employers facilitates employees wishing to work part-time, according to employees.

• Six out of ten Japanese employees would rather have a man as manager than a woman (59%).

Luxembourg

Press statements



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(% strongly agree +disagree)

- In Luxembourg, female employees more often work part-time than male employees (18% vs. 9%).

- Compared to male employees, female employees more often believe that working part-time is definitely possible in a management position (52% vs. 38%).

- Although a minority of Luxembourg employees believe that more women in higher management would improve performance, female employees agree on this more than male employees (36% vs. 17%).

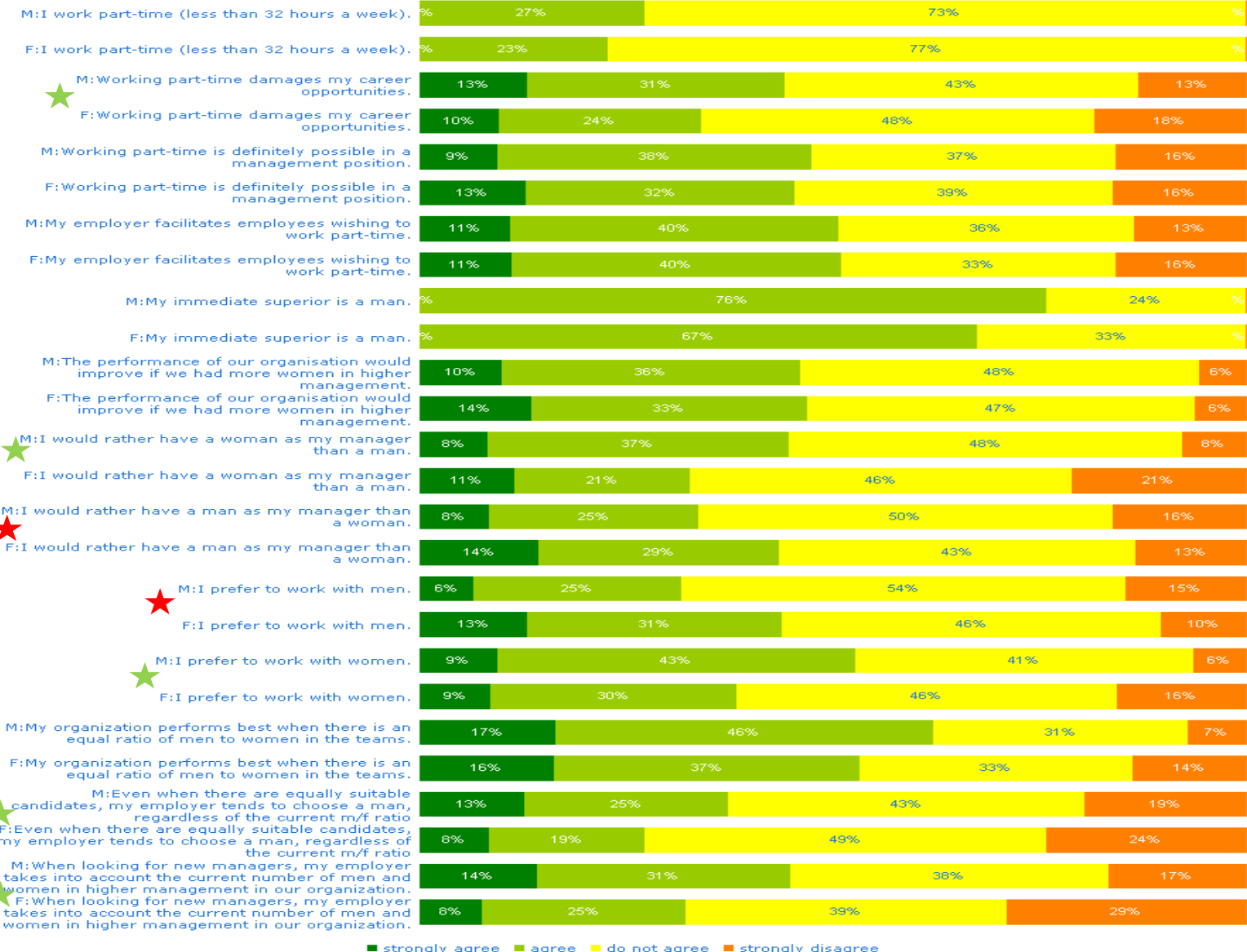
- Male employees more often prefer a man as manager (48% vs. 37%).

- Female employees more often than male employees believe that their organization would perform best if there was an equal ratio of men to women in teams (49% vs. 37%).

Mexico



Press statements



■ strongly agree ■ agree ■ do not agree ■ strongly disagree

★ = male employees agree more than female employees

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(% strongly agree + disagree)

- Compared to Mexican female employees, Mexican male employees more often believe that working part-time would damage their career opportunities (44% vs. 34%).

- Male employees would rather have a woman (45%) and female employees a man as manager (43%).

- Also, female employees prefer to have male colleagues (44%) and male employees prefer female colleagues (52%).

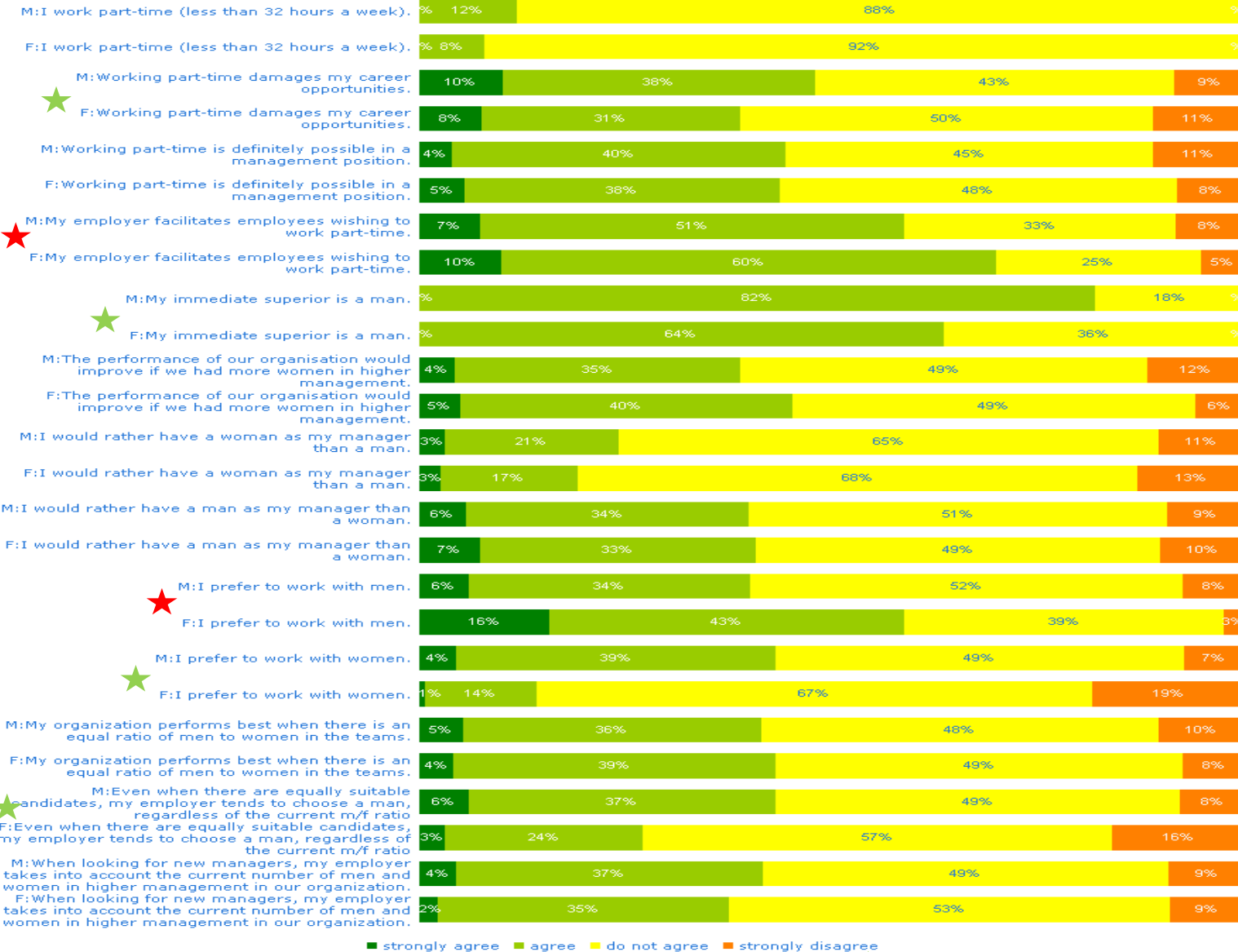
- Male employees more often acknowledge that, despite the fact that there are equally suitable male and female candidates, their employers tends to choose a man (38% vs. 27%).

- Also male employees more often believe that their employer takes into account the current number of men and women in higher management when looking for new managers (45% vs. 33%).

Netherlands



Press statements



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(% strongly agree + disagree)

- Compared to Dutch female employees, Dutch male employees more often believe that working part-time would damage career opportunities (48% vs. 39%)

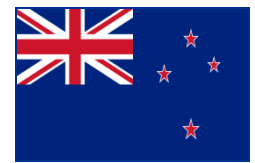
- Female employees more often indicate that their employer facilitates working part-time (70% vs. 58%).

- Dutch male employees more often have a male immediate superior than female employees (82% vs. 64%).

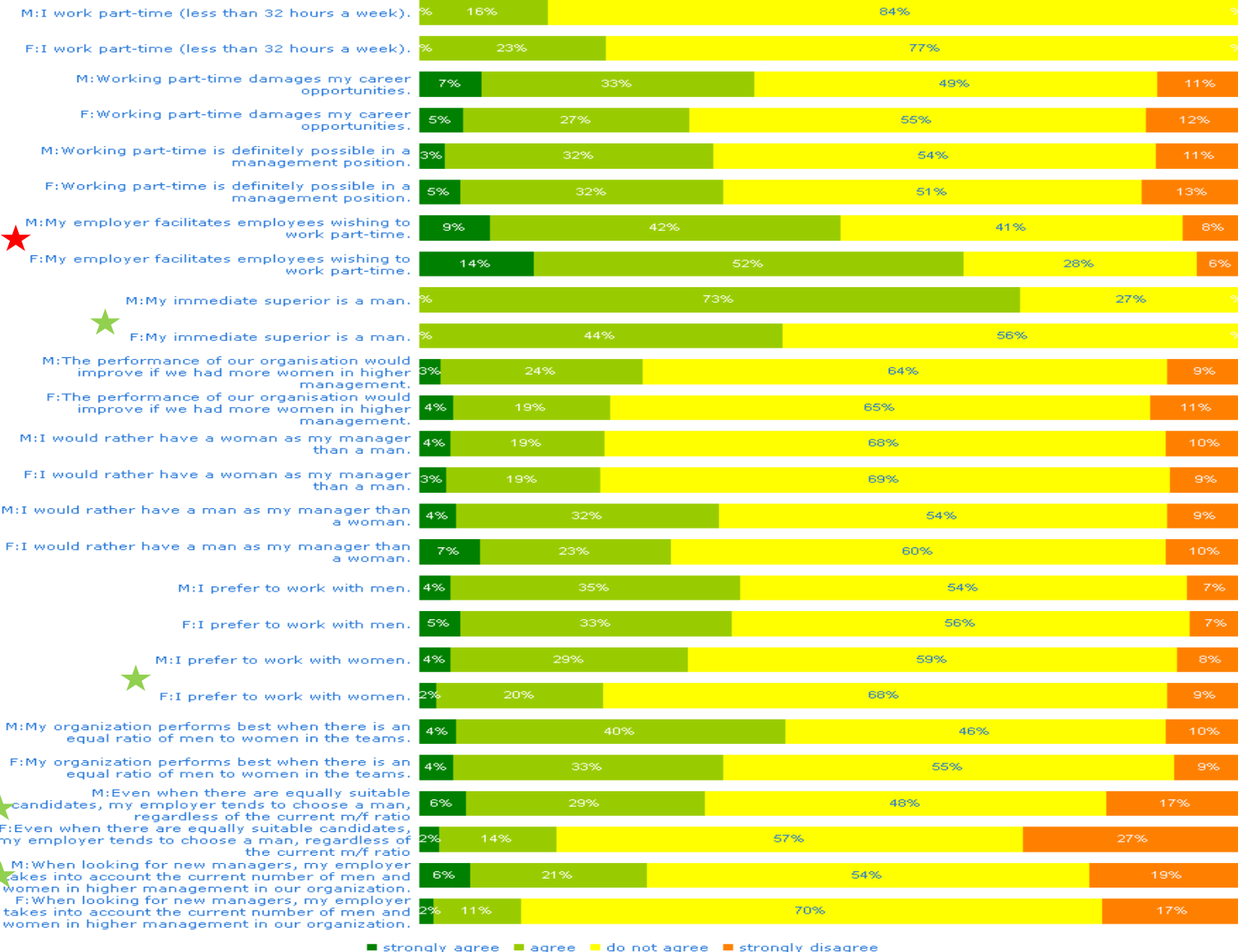
- Female employees prefer to work with men (59%) and male employees prefer to work with women (43%).

- Male employees more often acknowledge that their employer tends to choose a man even when there are equally suitable candidates (43% vs. 27%).

New Zealand



Press statements



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(% strongly agree + disagree)

- In New Zealand, a majority (66%) of female employees indicate that their employer facilitates wishes to work part-time (compared to 51% of male employees).

- Having a male immediate superior is more common among male than among female employees (73% vs. 44%).

- Nevertheless, male employees prefer to work with women more often than female employees (33% vs. 22%).

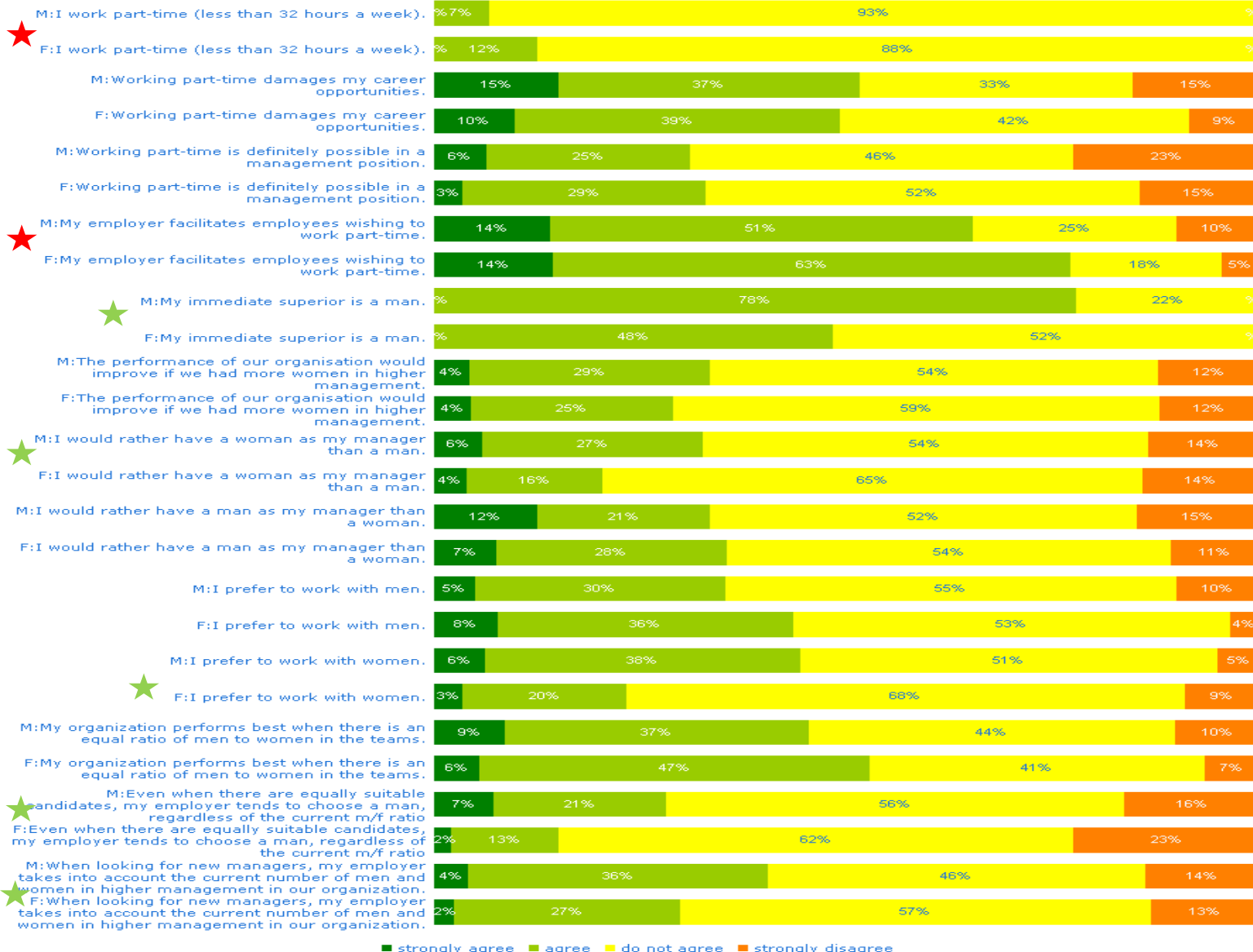
- Mostly male employees indicate that even when there are equally suitable male and female candidates, their employer tends to choose a man, (35% vs. 16%).

- On the other hand, male employers more often think that their employer takes into account the current number of men and women in higher management when looking for new managers (27% vs. 13%).

Norway



Press statements



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(% strongly agree + disagree)

- In Norway, female employees more often than male employees indicate that their employer facilitates employees wishing to work part-time (77% vs. 65%).

- 78% of Norwegian male employees versus 48% of Norwegian female employees have a male immediate superior.

- Compared to female employees, male employees more often prefer a woman as manager (33% vs. 20%)

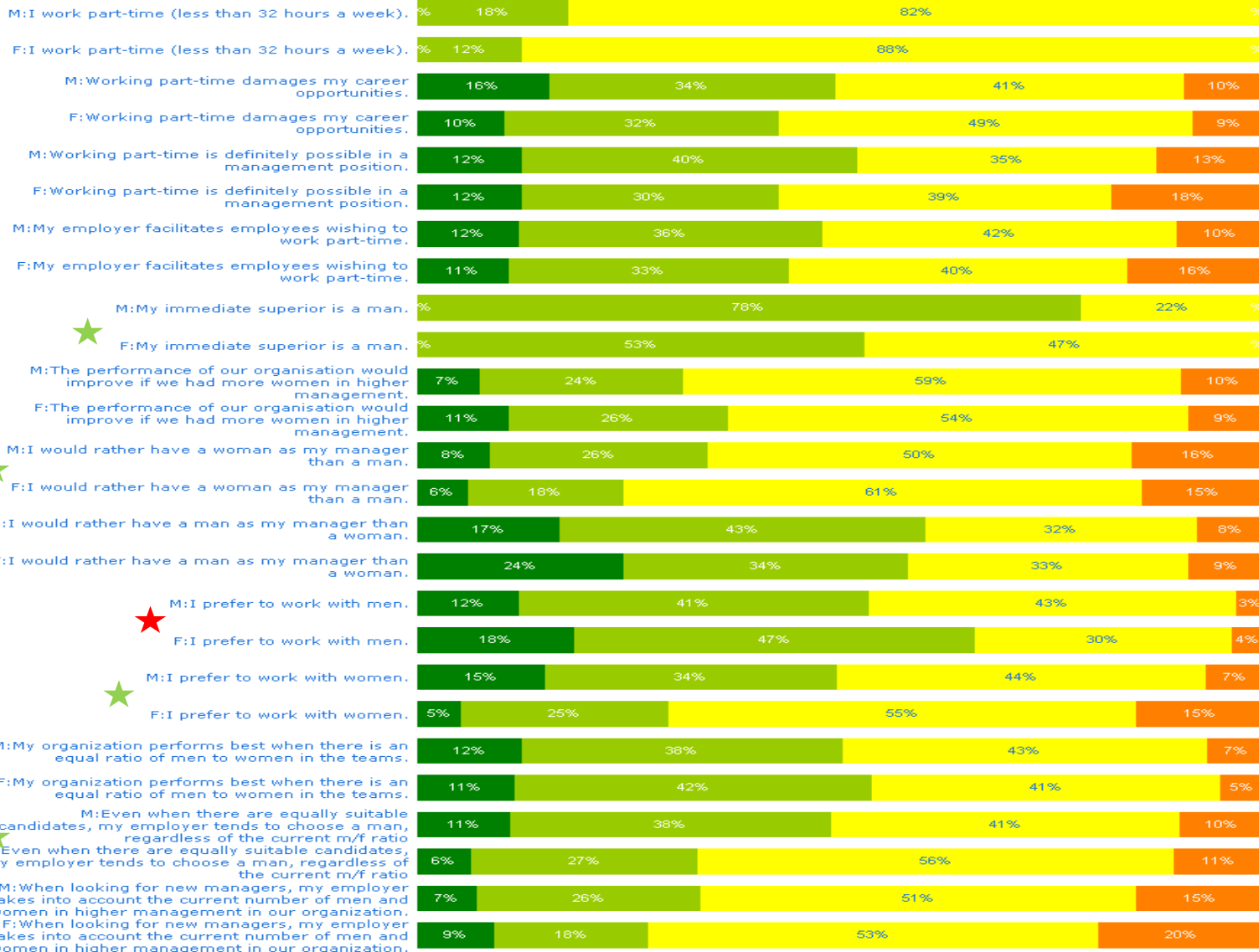
- Mostly male employees acknowledge that even when there are equally suitable male and female candidates, their employer tends to choose a man (28% vs. 15%).

- At the same time, male employees more often believe that their employer takes into account the current number of men and women in higher management when looking for new management.

Poland



Press statements



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(% strongly agree +disagree)

- Polish male employees more often have a male immediate superior than Polish female employees (78% vs. 53%).

- Male employees more often indicate that they would rather have a woman as manager (34% vs. 24%).

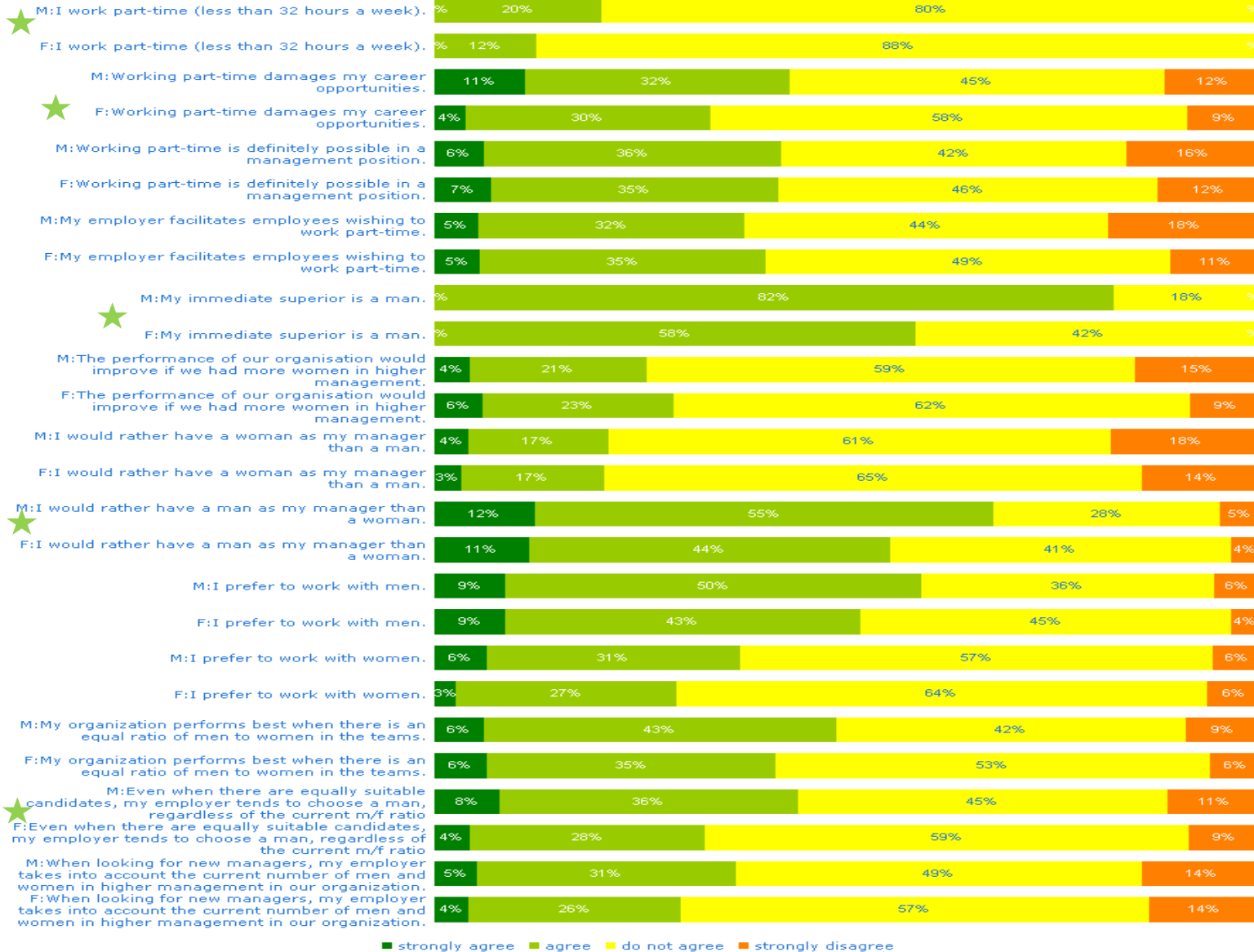
- Polish female employees prefer to work with men (65%) and Polish male employees prefer to work with women (49%).

- Male employees more often acknowledge that their employer tends to choose a man even when there are equally suitable male and female candidates (49% vs. 33%).

Singapore



Press statements



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(% strongly agree +disagree)

- In Singapore, male employees more often work part-time than female employees (20% vs. 12%).

- However, male employees more often think that working part-time will damage their career opportunities (43% vs. 34%).

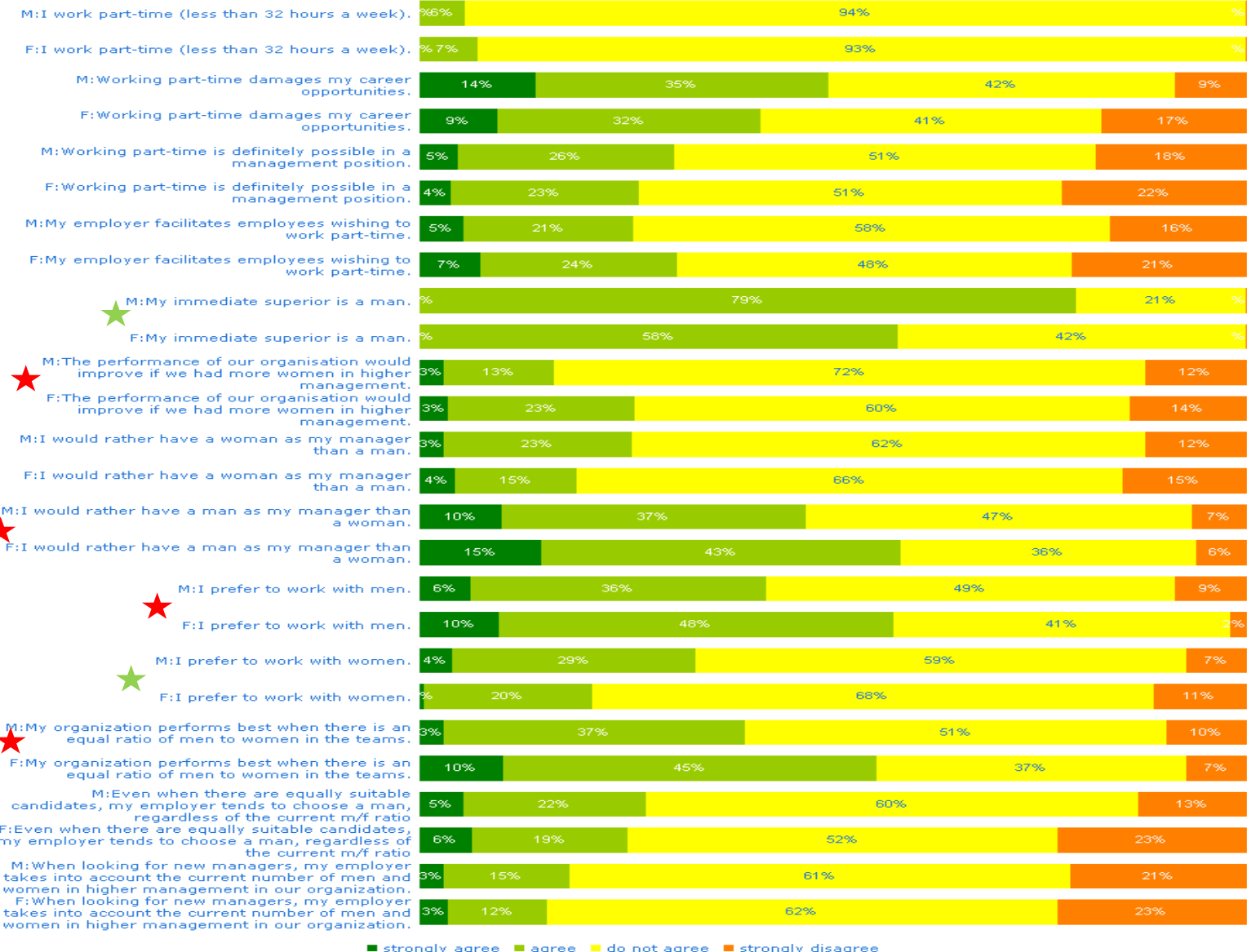
- Male employees more often have a male immediate superior (82% vs. 58%).

- Male employees more often indicate that they would rather have a woman as manager (67% vs. 55%).

- Compared to female employees, male employees more often acknowledge that their employer tends to choose a man, even when there are equally suitable male and female candidates (44% vs. 32%).



Press statements



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(% strongly agree + disagree)

- In Slovakia, male employees more often have a male immediate superior than female employees (79% vs. 58%).

- Female employees more often than male employees believe that more women in higher management would improve the performance of their organization (26% vs. 16%).

- Nevertheless, more than half of female employees prefer a man as their manager to a woman (58% vs. 47% of male employees).

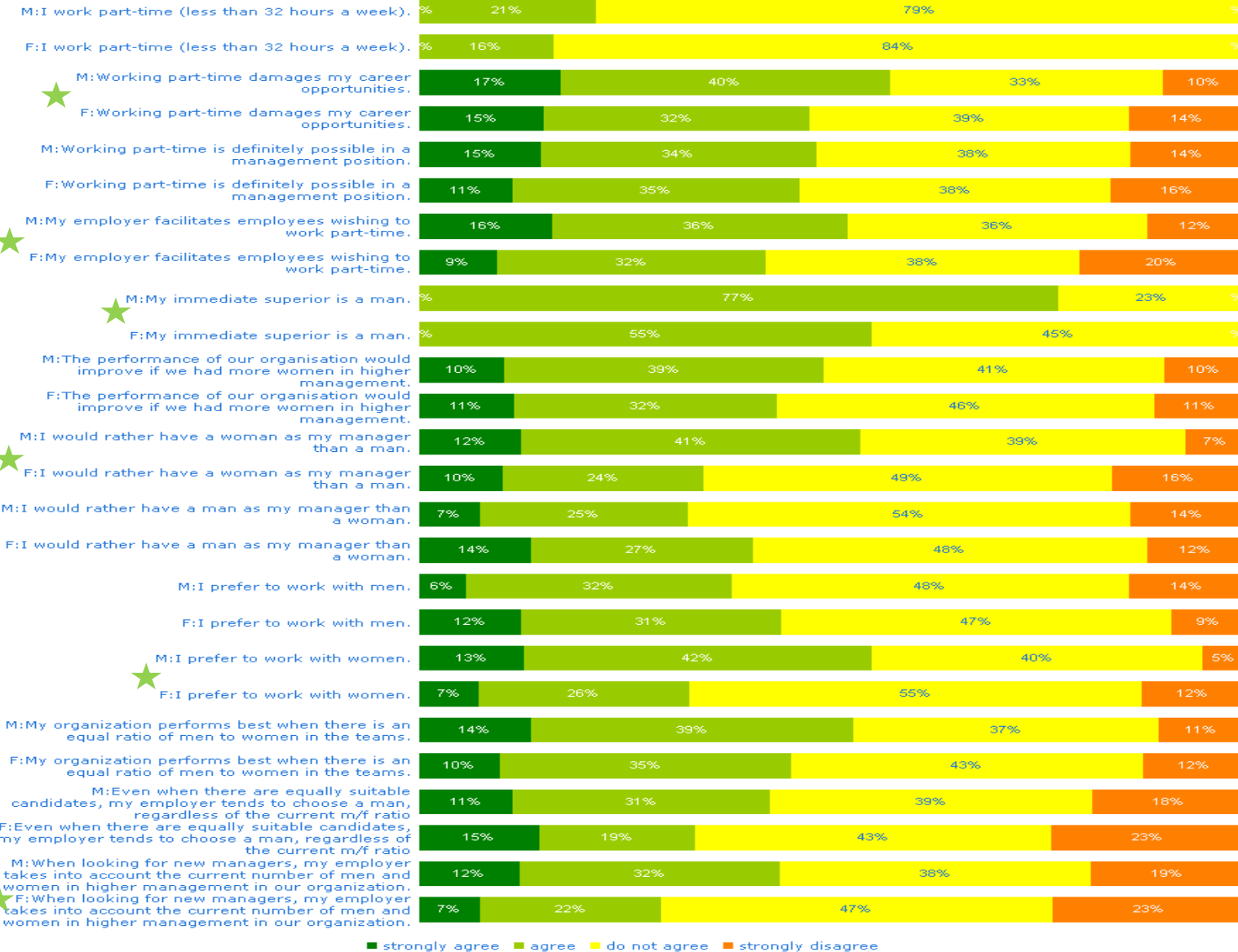
- Female employees prefer to work with men (57%) and male employees prefer working with women (53%).

- According to 55% of female employees, their organization performs best when there is an equal ratio of men to women in the teams, versus 39% of male employees.

Spain



Press statements



■ strongly agree
 ■ agree
 ■ do not agree
 ■ strongly disagree

★ = male employees agree more than female employees

★ = female employees agree more than male employees

(% strongly agree +disagree)

- Spanish male employees more often believe that working part-time will damage their career opportunities (57% vs. 47%).

- Male employees more often indicate that their employer facilitates employees who wish to work part-time (52% vs. 41%).

- Male employees more often than female employees have a male superior (77% vs. 55%).

- However, male employees would prefer a female manager more than female employees do (53% vs. 34%).

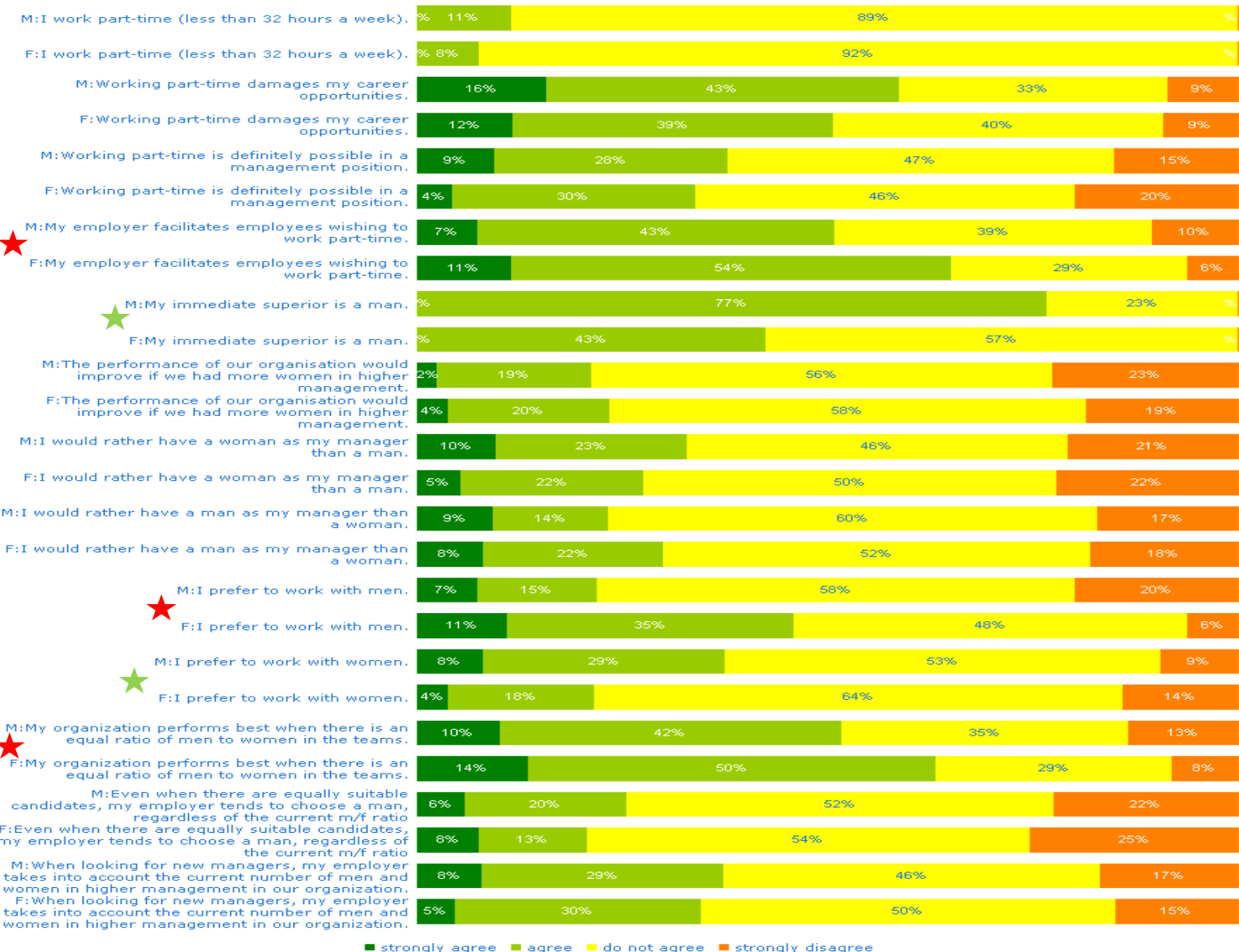
- Also, more than female employees, they prefer to work with women (55% vs. 33%).

- Male employees more often acknowledge that their employer takes into account the current number of men and women in higher management when looking for new managers (44% vs. 29%).

Sweden



Press statements



- Compared to Swedish male employees, Swedish female employees more often state that their employer facilitates employees wishing to work part-time (65% vs. 50%).

- Male employees more often have a male superior than female employees (77% vs. 43%).

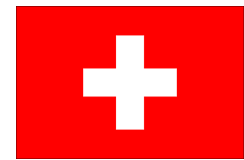
- In Sweden, female employees prefer to work with men (46% vs. 22%) and male employees prefer to work with women (37% vs. 22%).

- A majority of Swedish employees believes that their organization performs best when there is an equal ratio of men to women in the teams, female employees agree more on this (64% vs. 52%).

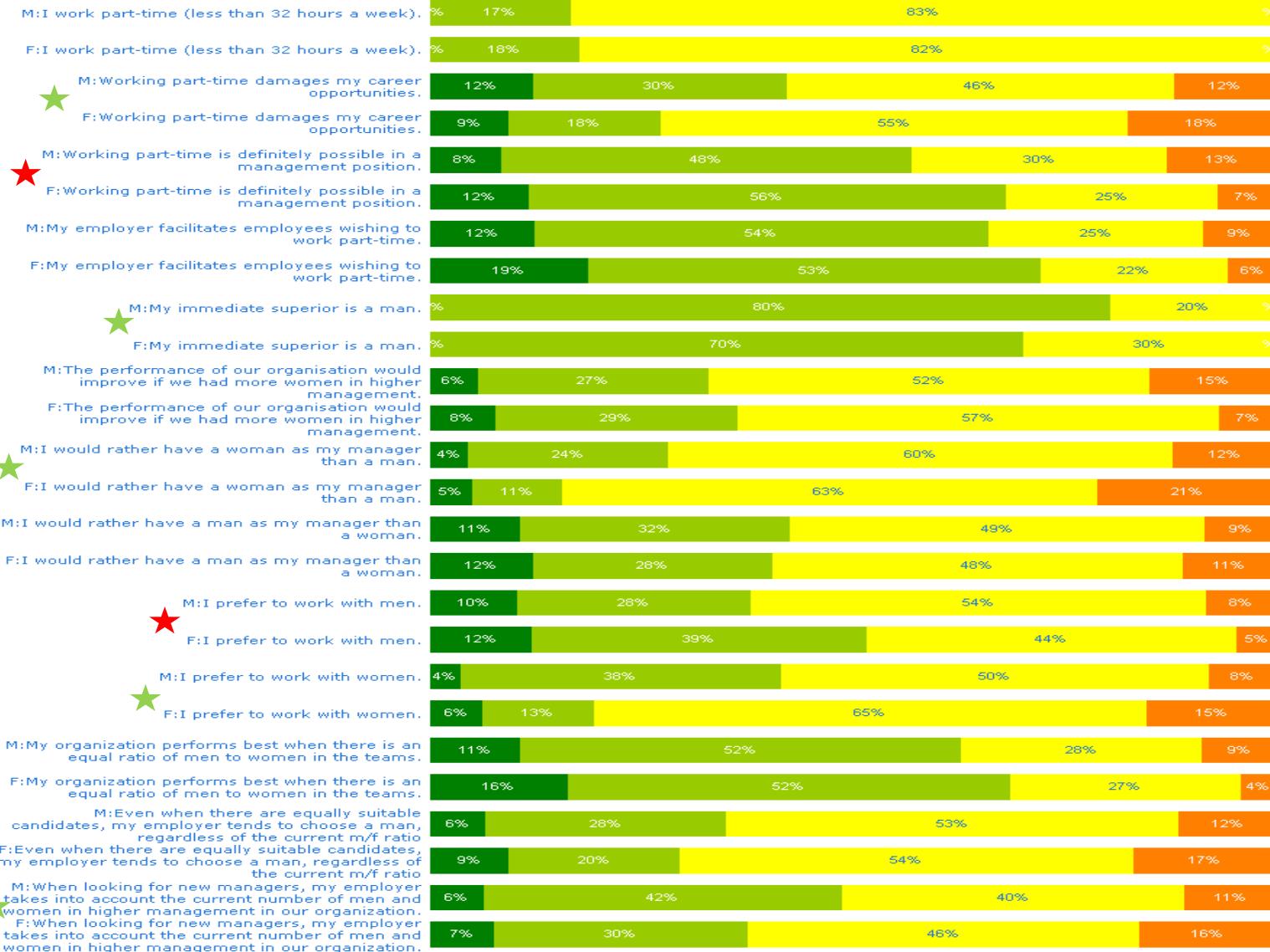
■ strongly agree ■ agree ■ do not agree ■ strongly disagree

★ = male employees agree more than female employees
 ★ = female employees agree more than male employees
 (% strongly agree + disagree)

Switzerland



Press statements



■ strongly agree ■ agree ■ do not agree ■ strongly disagree

★ = male employees agree more than female employees

★ = female employees agree more than male employees

(% strongly agree +disagree)

- In Switzerland, male employees more often believe that working part-time damages their career opportunities (42% vs. 27%).

- Female employees more often think that working part-time is definitely possible in a management position (68% vs. 56%).

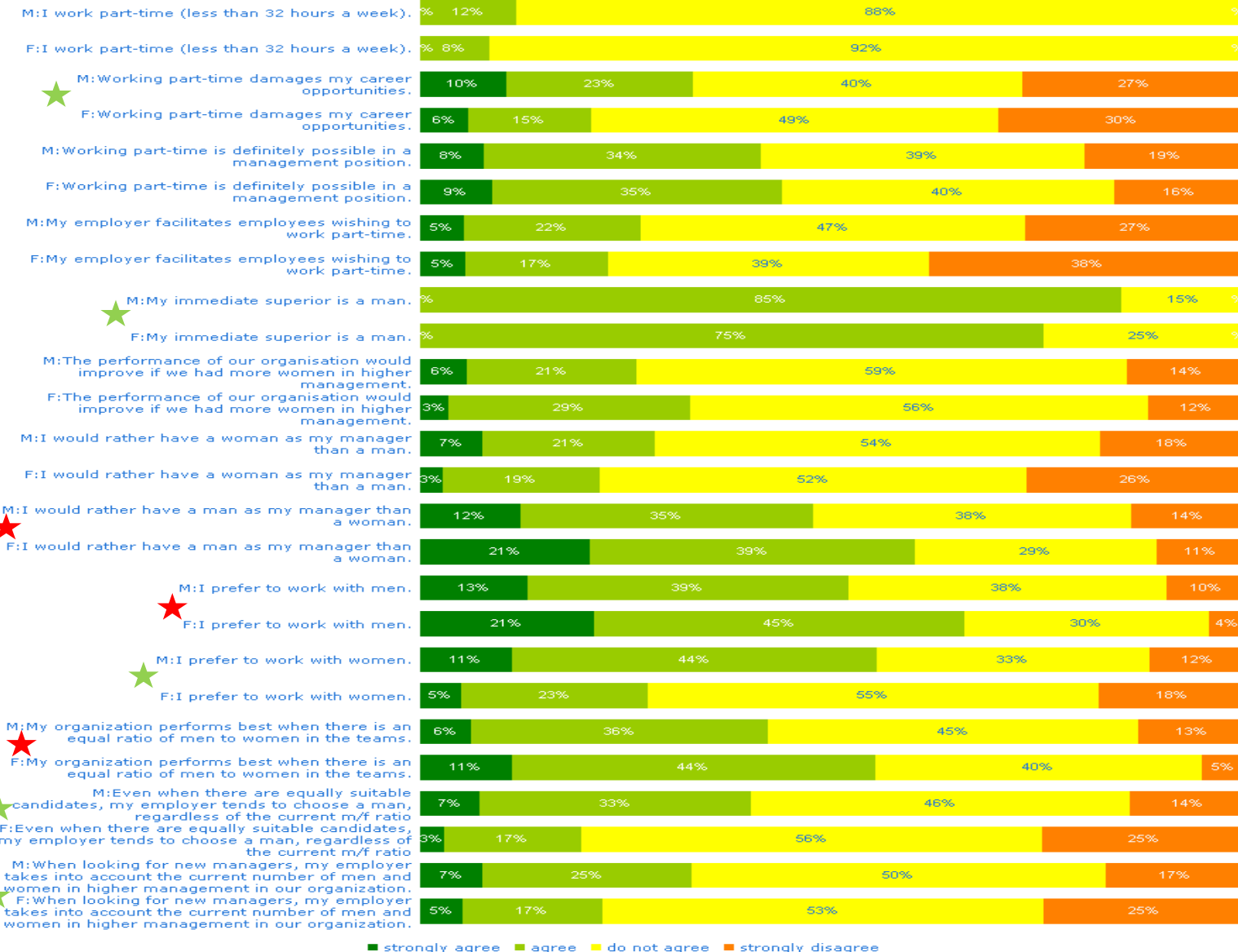
- 28% of male employees versus 16% of female employees would rather have a woman than a man as their manager.

- Female employees more often prefer to work with men (51% vs. 36%) and male employees with women 42% vs. 19%).

- 48% of male versus 37% of female employees believes their employer takes into account the current number of men and women in higher management when looking for new managers.



Press statements



■ strongly agree
 ■ agree
 ■ do not agree
 ■ strongly disagree

★ = male employees agree more than female employees
★ = female employees agree more than male employees
★ (strongly agree + disagree)

- In Turkey, male employees more often believe that working part-time damages their career opportunities (33% vs. 21%).

- 60% of the female employees versus 47% of male employees would rather have a man than a woman as their manager.

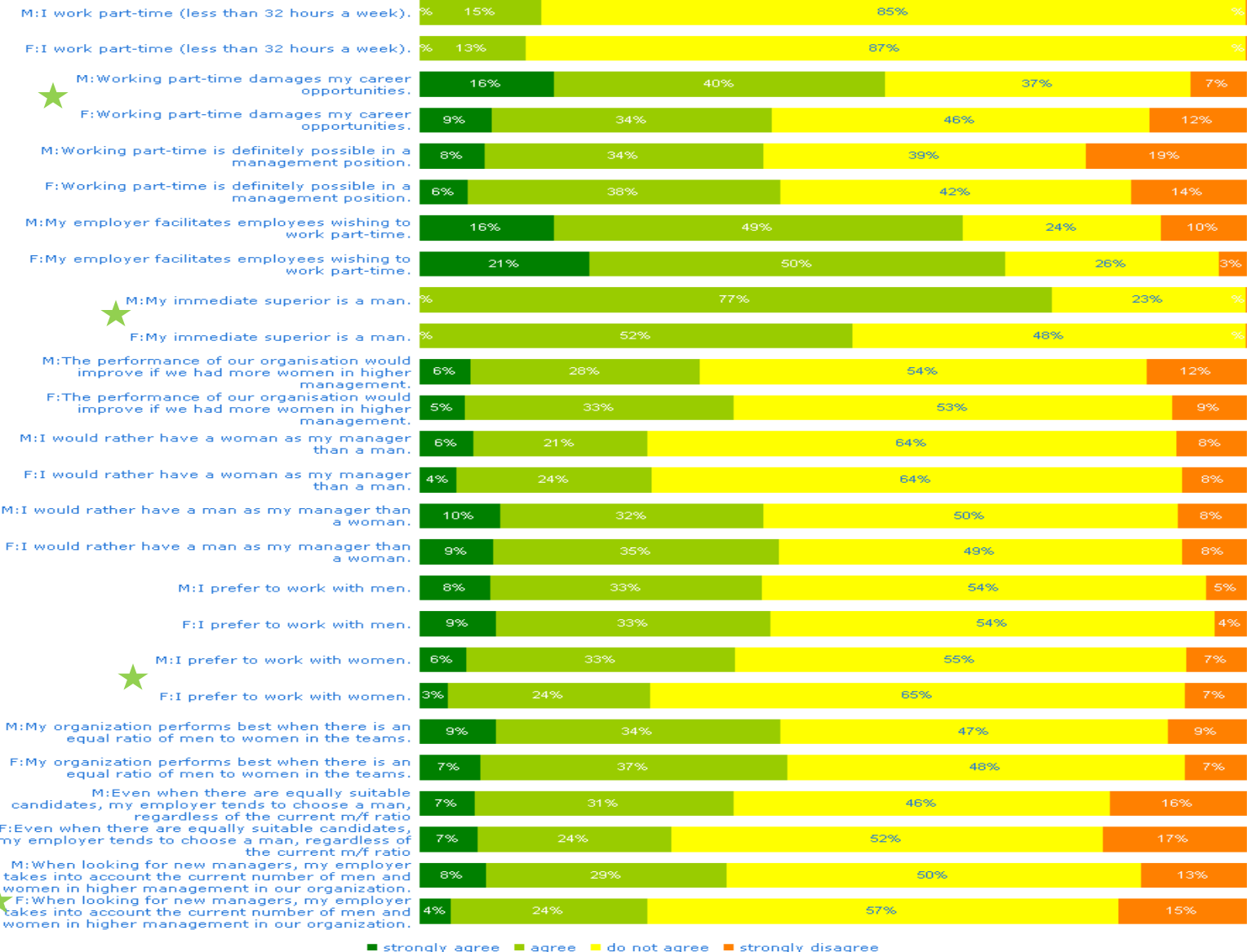
- Female employees prefer to work with men (66% vs. 52%) and male employees prefer to work with women (55% vs. 28%).

- Female employees agree more that their organization performs best when there is an equal ratio of men to women in the teams (55% vs. 42%).

- 40% of male employees versus 20% of the female employees believes that even when there are equally suitable male and female candidates, their employer tends to choose a man.



Press statements



- British male employees more often think that working part-time would damage their career opportunities than female employees (56% vs. 43%).

- Although a majority of British employees have a male immediate superior, this is more common among male than among female employees (77% vs. 52%).

- Male employees prefer to work with women more than female employees do (39% vs. 27%).

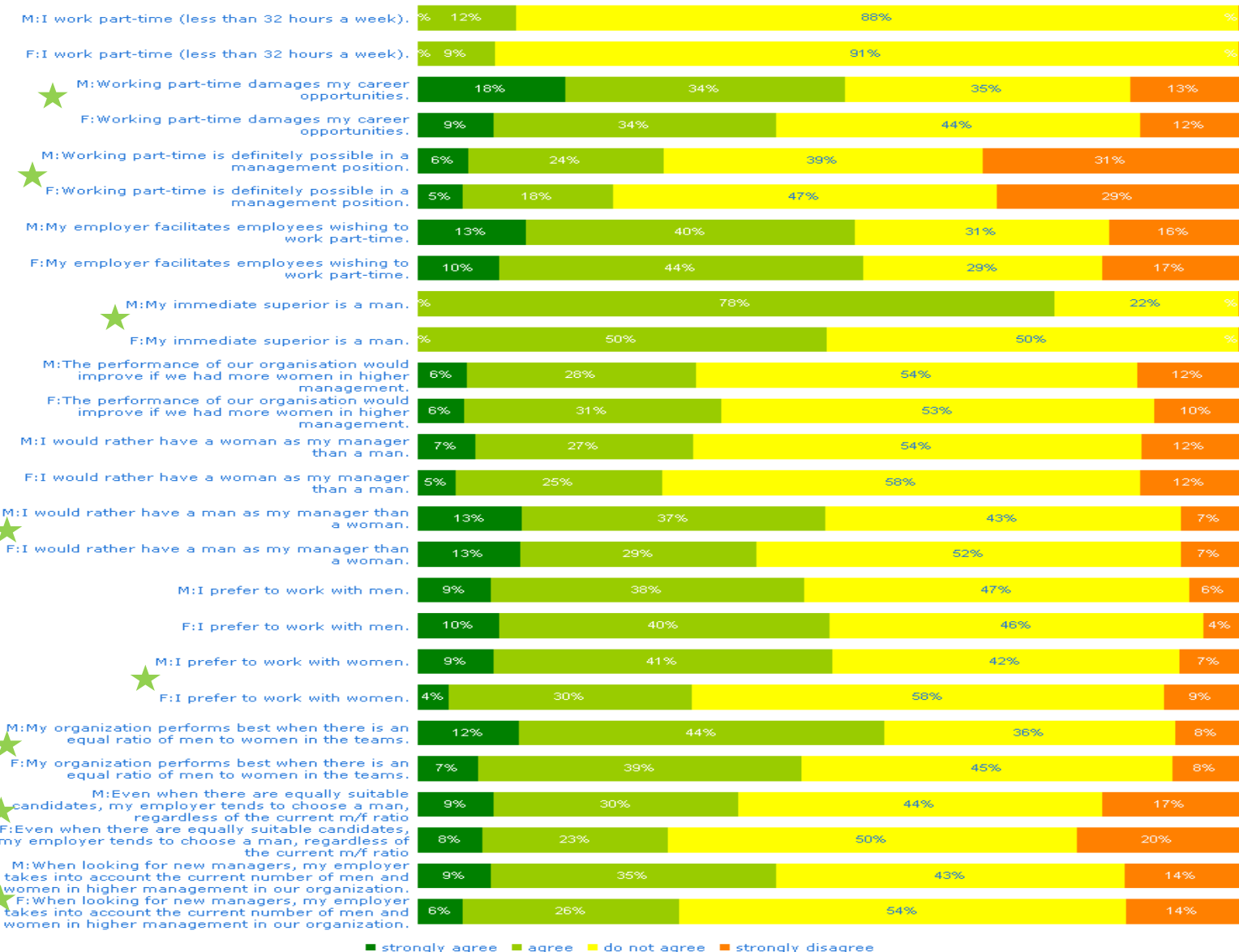
- 37% of male British employees versus 28% of female employees believes that their employer takes into account the current number of men and women in higher management when looking for new managers.

Legend:
■ strongly agree
■ agree
■ do not agree
■ strongly disagree

★ = male employees agree more than female employees
 ★ = female employees agree more than male employees
 (% strongly agree +disagree)



Press statements



■ strongly agree ■ agree ■ do not agree ■ strongly disagree

★ = male employees agree more than female employees

★ = female employees agree more than male employees

(% strongly agree +disagree)

- In America, male employees more often than female employees think that working part-time will damage their career opportunities (52% vs. 43%).

- However, 30% of male employees versus 23% of female employees believes working part-time is definitely possible in a management position.

- Male employees would prefer a female manager more than female employees do (50% vs. 42%).

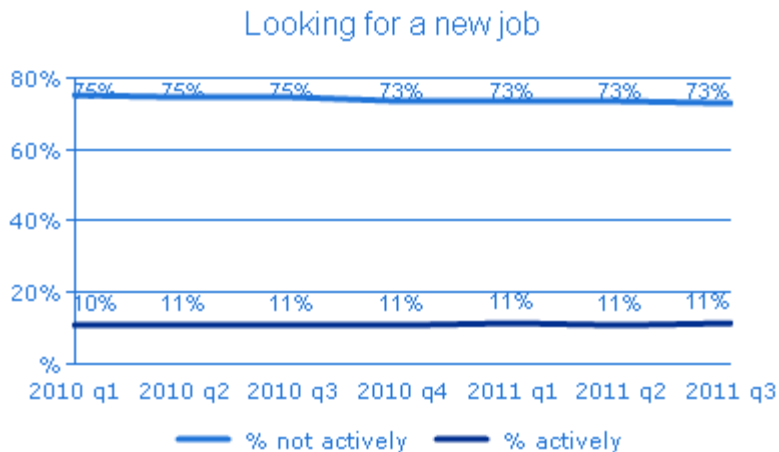
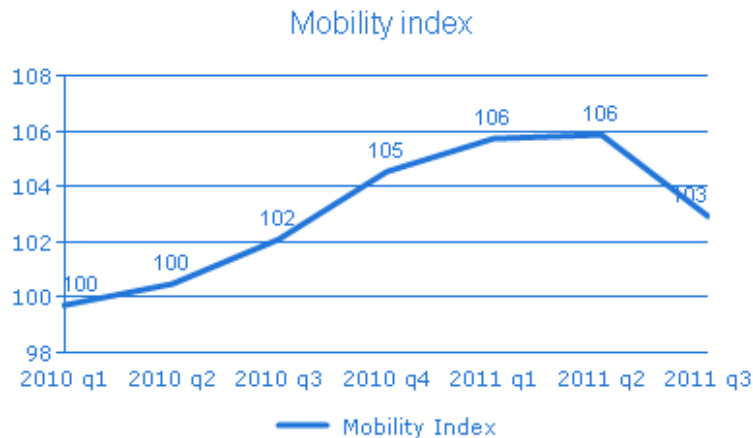
- Also, male employees more often believe that their organization performs best when there is an equal ratio of men to women in the teams (56% vs. 46%).

- 39% of male employees versus 31% of female employees indicate that even when there are equally suitable male and female candidates, their employer tends to choose a man.

index

- Chapter 1: gender
- **Chapter 2: mobility**
- Chapter 3: satisfaction
- Chapter 4: personal motivation

Swiss and Belgian Mobility Index declines



Changes	↑	↓
Australia		5
Belgium		13
Canada		8
Chile	7	
France		7
Italy		8
Mexico		7
New Zealand	8	
Slovakia	6	
Spain		10
Sweden		6
Switzerland		13
UK		7

Question:

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

or

• Do you think you will be doing *different work for a different employer* within the next 6 months?

Question:

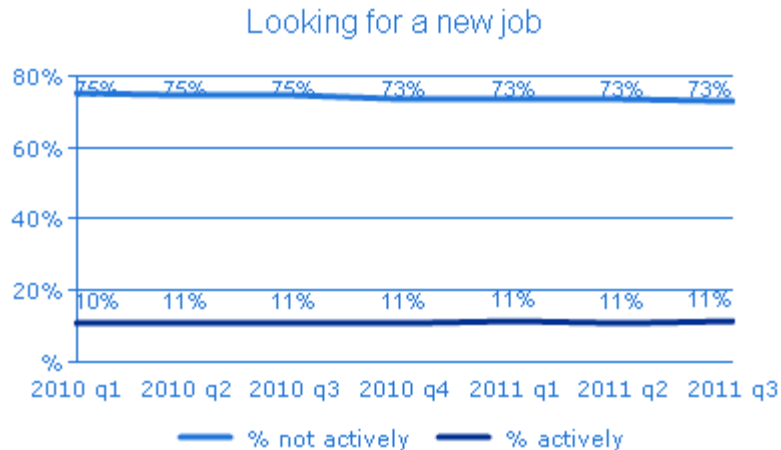
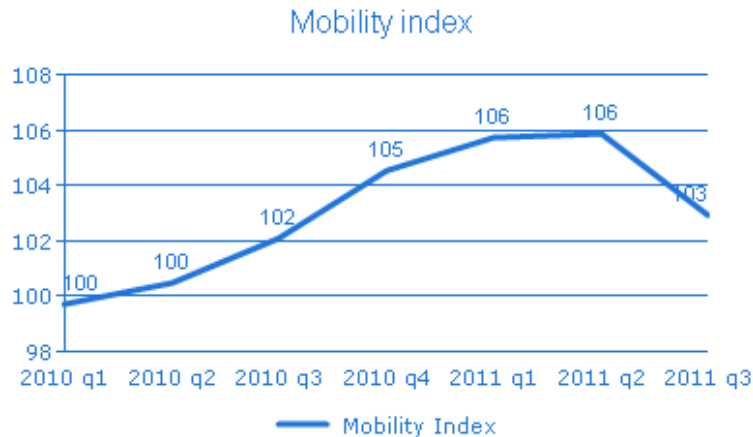
• To what extent are you currently looking for another job?

Changes	↑	↓
Canada	7%*	4%**
China	12%**	14%*
India	9%*	
Mexico	5%**	6%*
New Zealand	7%**	
Singapore		7%*
Switzerland		7%*
US		5%*

• * change in the first category – light blue line

•** change in the 2nd category – dark blue line

mobility seems to be declining, no change in job seeking



In general, the job market seems to be less active than in Q1 2011. No changes have occurred in the number of employees looking for a new job in the past 3 months.

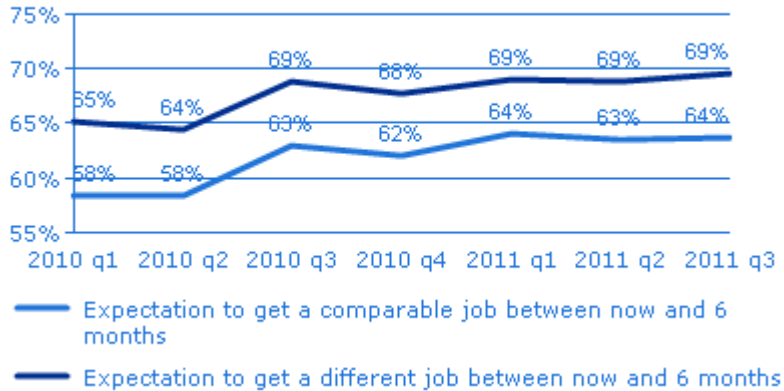
At country level, mobility in Switzerland and Belgium (both -13), Spain, Canada, Italy, France, Mexico, UK, Sweden and Australia has declined. In New Zealand, Chile and Slovakia, however, the job market seems to be more active than in Q2 2011.

Swedish employees are most actively looking for a new job (27% actively compared to 11% worldwide). In New Zealand, employees are more actively looking for another job.

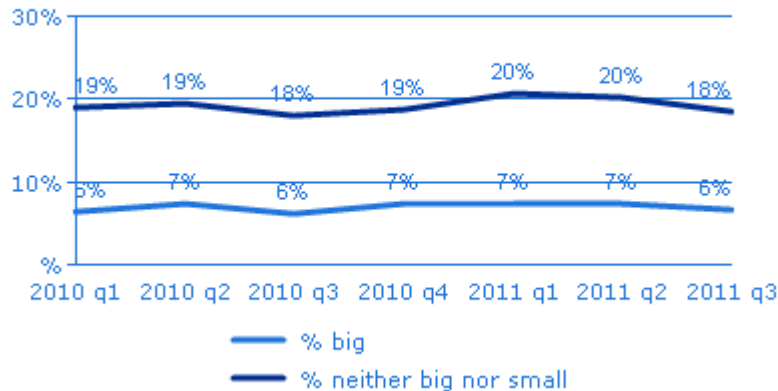
Compared to Q2 2011, Canadian employees are less actively looking for another job; in China and Mexico employees are more actively looking.

boost of confidence in Luxembourg and New Zealand, employees in Switzerland less fearful

Trust



Fear of job loss



Changes	↑	↓
Italy		8%**
Luxembourg	7%**	
New Zealand	8%**	
Singapore	7%*	

Question:

• Suppose you had to look for a new job now with a different employer. Do you think you could get *similar* work with a different employer within the next 6 months?

• And do you think you could get *other* work with a different employer between now and 6 months?

Changes	↑	↓
Belgium		5%*
China	5%*	
Italy		5%*
Mexico		4%*
Netherlands		6%**
Switzerland		10%* 7%**
Turkey		7%*

Question:

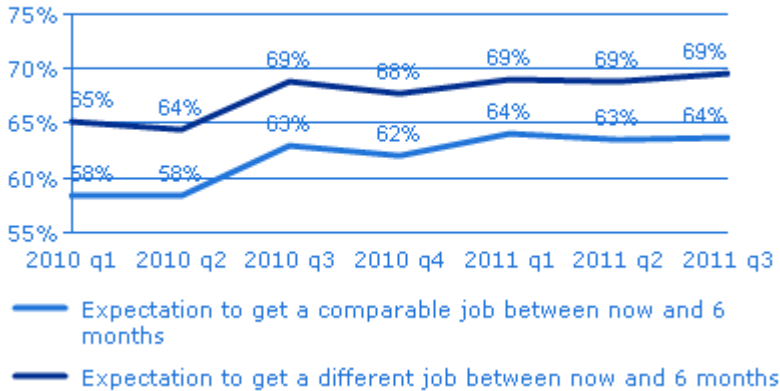
• How great do you feel the chances are that you will lose your job or that your contract will not be extended within the next 6 months?

• * change in the first category – light blue line

• ** change in the 2nd category – dark blue line

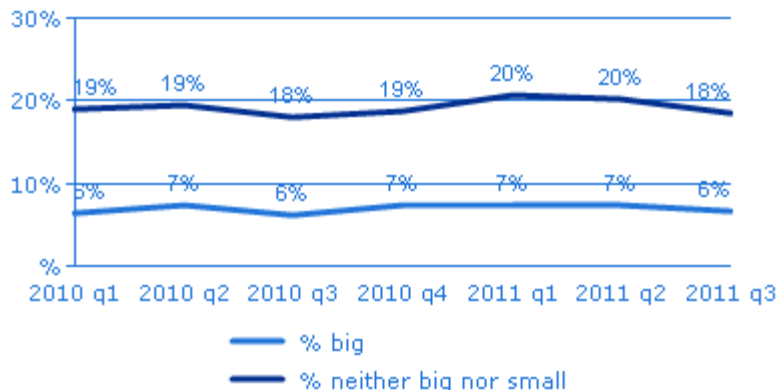
in general, confidence is stable

Trust



In general, the level of confidence is stabilizing. Indian, Chinese and Mexican employees are most confident about finding another job (comparable or different). In Luxembourg and New Zealand, employees are more confident compared to three months ago. The level of confidence in finding a comparable job is lowest in Japan.

Fear of job loss

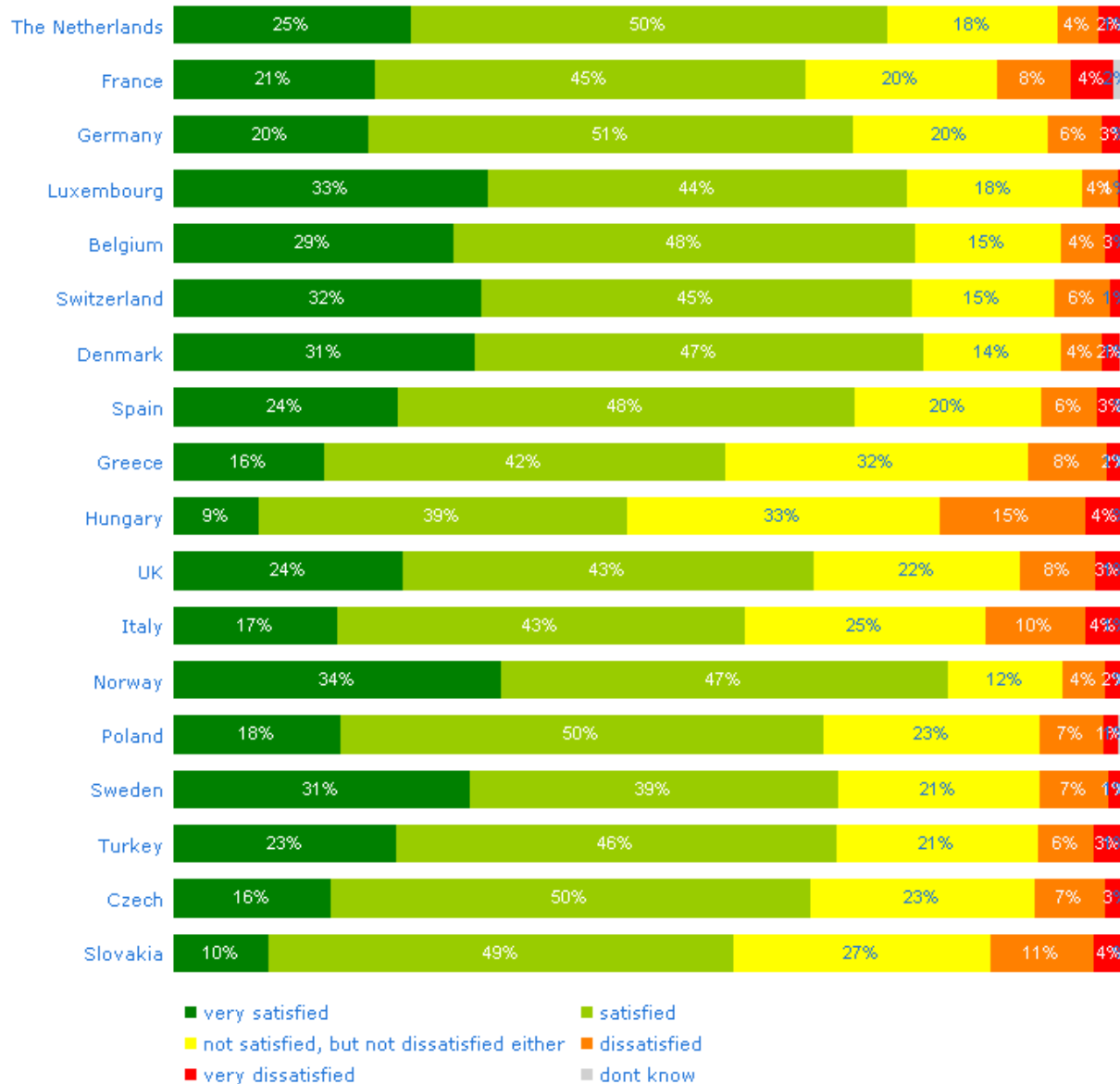


Employees in India and Greece are most fearful of losing their job. In China too, fear has increased significantly in the past 3 months. Especially in Norway, not many employees are very fearful of losing their job. Turkish, Belgian, Italian, Mexican and particularly Swiss employees are now less fearful than 3 months ago.

index

- Chapter 1: gender
- Chapter 2: mobility
- **Chapter 3: satisfaction**
- Chapter 4: personal motivation

satisfaction Europe

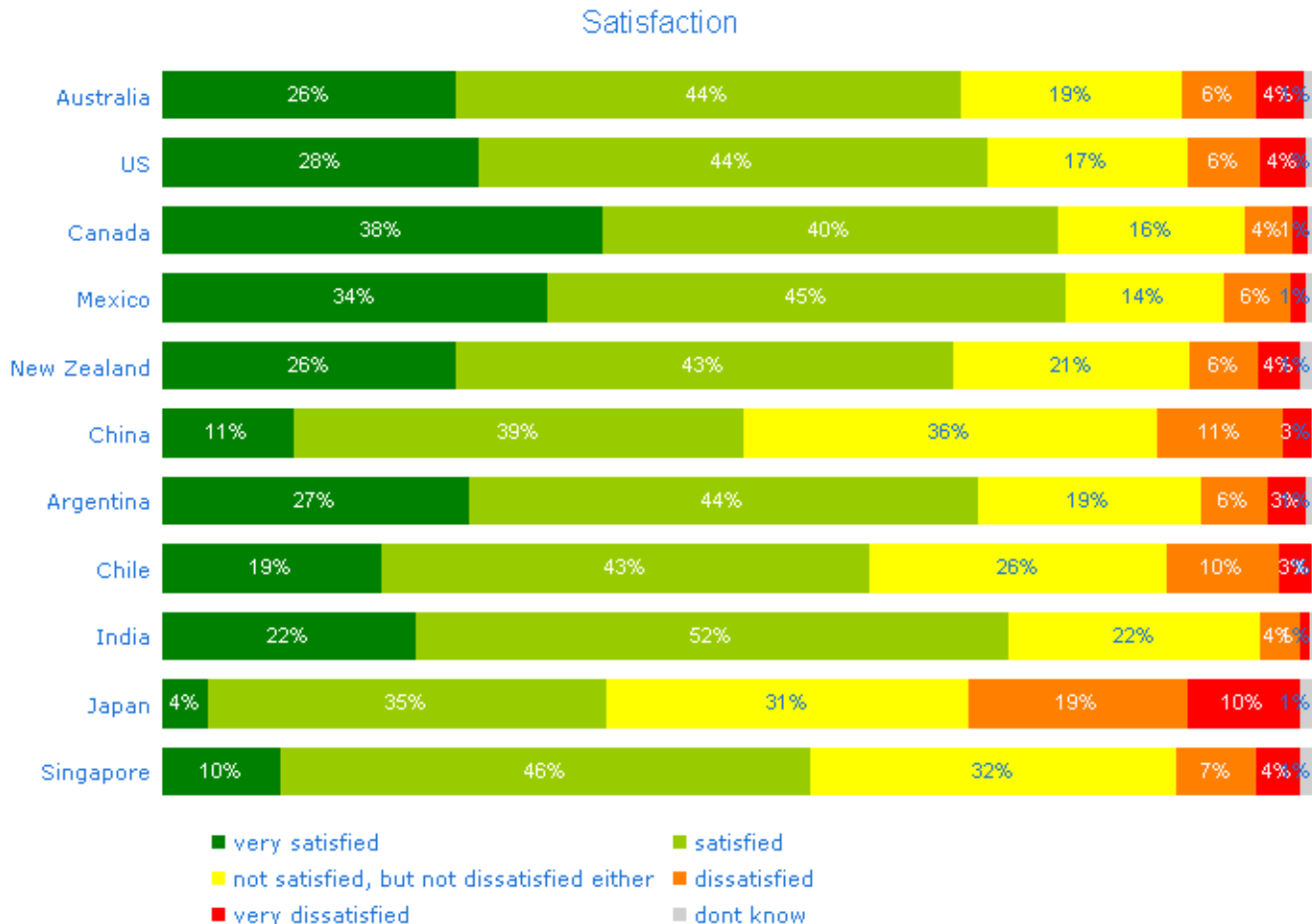


In the European countries, satisfaction with the current employer remained the same over the last three months.

The most *very* satisfied employees can be found in northern Europe.

Question: How satisfied are you in general working for your current employer?

satisfaction world excl. Europe



Compared to 3 months ago, Mexican employees are less satisfied. The number of (very) satisfied Mexican employees remains relatively high.

In China too, employee satisfaction has declined.

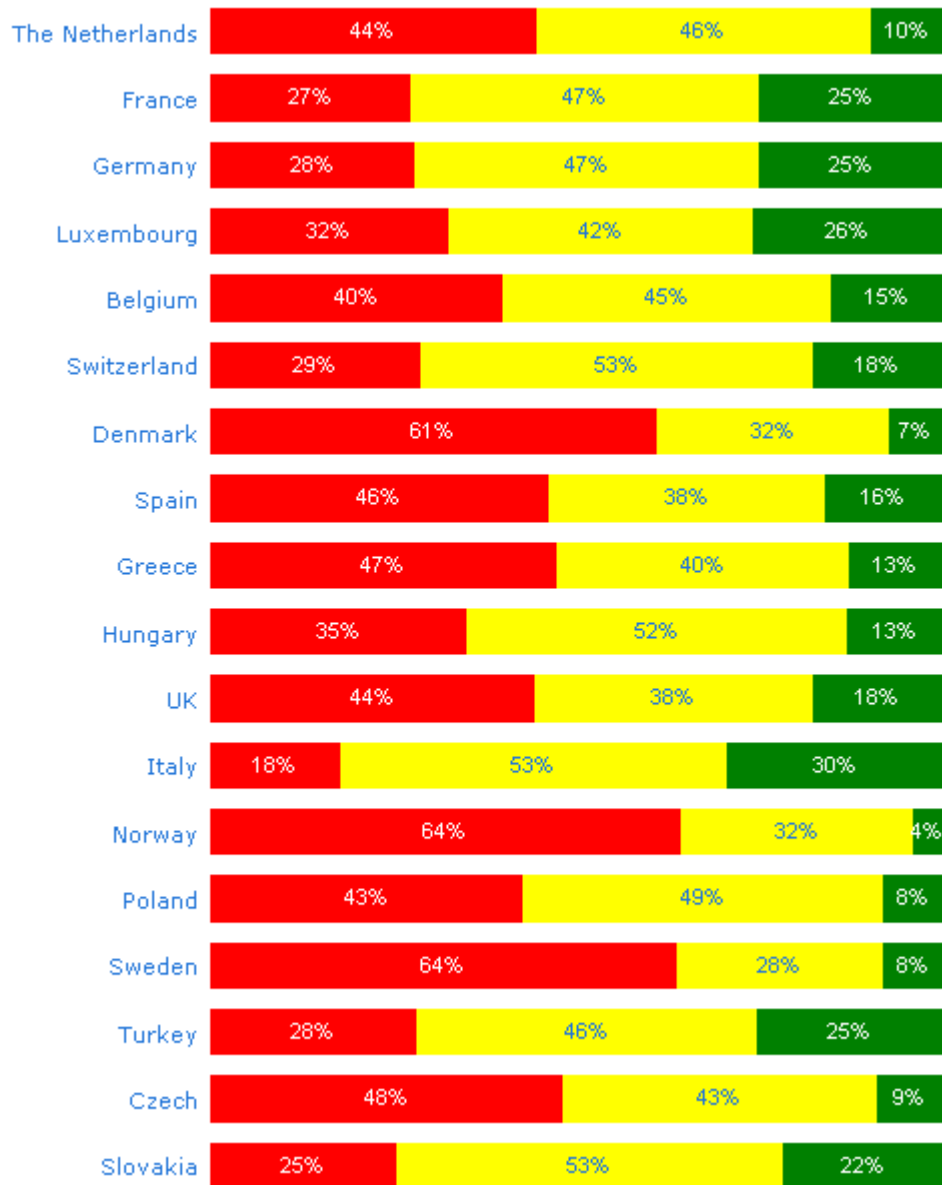
↓ = less often (very) satisfied compared to Q2 2011

Question: How satisfied are you in general working for your current employer?

index

- Chapter 1: gender
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personal motivation Europe (1)



As before, employees in the Scandinavian countries (Denmark, Norway and Sweden) are the least focused on getting promotion.

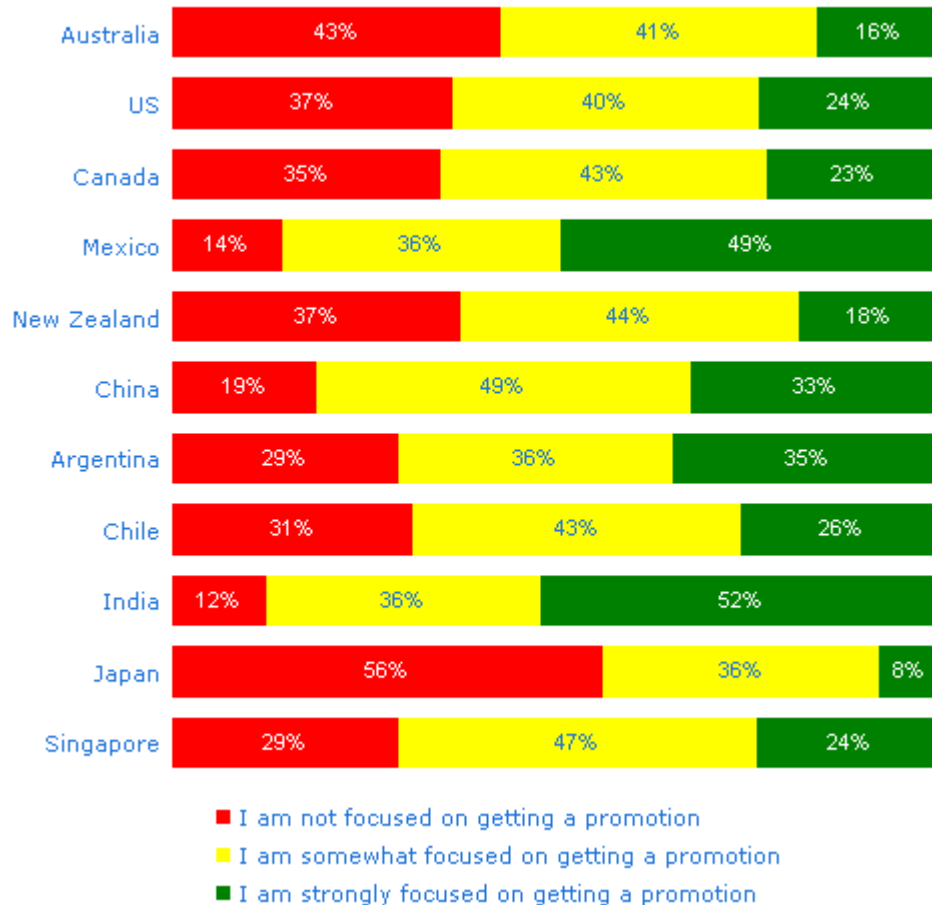
The most ambitious employees in Europe can be found in Italy.

Question: To what extent are you focused on getting promotion?

- I am not focused on getting a promotion
- I am somewhat focused on getting a promotion
- I am strongly focused on getting a promotion

personal motivation excl. Europe (2)

Focus on promotion



The most ambitious employees outside Europe can still be found in Mexico and India.

In Argentina, after an increase in personal motivation in Q2 2011, the focus on promotion has declined.

↓ = less focused on promotion compared to Q2 2011

Question: To what extent are you focused on getting promotion?

more information

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