

# Randstad Workmonitor global findings wave 2, 2010

Randstad Holding nv

June 2010



# background Randstad Workmonitor (1)

- After the successful introduction of the Workmonitor in the Netherlands in 2003, and more recently in Germany, the survey now covers 25 countries around the world, encompassing Europe, Asia Pacific and the Americas. The Randstad Workmonitor is published four times a year, making both local and global trends in mobility regularly visible over time.
- The Workmonitor's Mobility Index, which tracks worker confidence and captures expectations surrounding the likelihood of changing employers within a six month time frame, provides a comprehensive understanding of job market sentiments and employee trends. In addition to measuring mobility, also employee satisfaction & personal motivation, as well as a rotating set of themed questions are part of the survey.

# background Randstad Workmonitor (2)

- The quantitative study is conducted via an online questionnaire among a population aged 18-65, working a minimum of 24 hours a week in a paid job (not self-employed). The minimal sample size is 400 interviews per country, using Survey Sampling International. Research for the second wave was conducted May 7-18, 2010.

Participating countries:

Argentina	Czech Republic	Hungary	Mexico	Sweden
Australia	Denmark	India	Netherlands	Switzerland
Belgium	France	Italy	Norway	Turkey
Canada	Germany	Japan	Slovakia	UK
China	Greece	Luxembourg	Spain	US

## wave 2 summary (1) – workload and holiday

A reasonable number of employees worldwide indicate that their organization has suffered from the crisis last year. Fortunately times are changing. **In most countries more than half of the employees indicate that the workload has increased in the first months of 2010.** For example in Hungary, 86% of the employees work in an organization that suffered from the crisis, but also 70% of all Hungarian employees noticed improvement the first quarter of this year. **Despite the increased workload, the majority of employees worldwide are satisfied with the number of days off they receive.**

**Employees all over the world successfully balance work and private life.** The satisfaction with the number of days off probably results in the fact that employees think that they succeed in keeping a balance between their work and private life. They are satisfied with their holiday allowance and do not think other employees have more days off than they do. Only employees from South America (Argentina and Mexico), Turkey and Italy are generally not satisfied with their holiday allowance.

## wave 2 summary (2) – workload and holiday

Striking a successful balance between work and private life does not always mean that employees can separate work and private life. **In most countries a third of the employees think about work** and/or receive calls and e-mails during days off.

**In France, Denmark, the Netherlands and Canada** the smallest share of employees work during their days off and/or think about their work. In those countries **people also succeed the best in balancing work and private life**. In Argentina and Mexico employees more often answer e-mails and/or phone calls during their holiday, but besides that they do not think too much about their work.

Although most employees in several countries are happy with the number of days off and manage to have a proper balance between work and private life, they really do need these days off. **After a few days off, a majority of employees is performing noticeably better.**

## wave 2 summary (3) – mobility, satisfaction & personal motivation

Last year companies worldwide suffered from the downturn. In most countries approximately half of the employees noticed a pick-up in workload in Q2. This positive development has influenced the **confidence people have in finding a new job**, in case they have to look for one.

**In Belgium, Denmark, Norway and Japan this confidence has increased compared to three months ago.** Only in Greece and India increased workload has had no positive influence on the confidence in finding a new job and the fear of losing one's current job. In both countries a substantial number of employees fear losing their job; this is an increase compared to three months ago.

## wave 2 summary (4) – mobility, satisfaction & personal motivation

Especially employees from Scandinavia, Canada and Mexico have great confidence in their own employability. They are optimistic about finding a new job if they have to look for one. Employees from those countries and employees from Luxembourg are also relatively satisfied about their employer.

Employees in India have the highest score (89%) in the focus on getting a promotion, closely followed by Mexico (84%), Italy (79%) and Slovakia (75%). The lowest scores are found in Scandinavia.

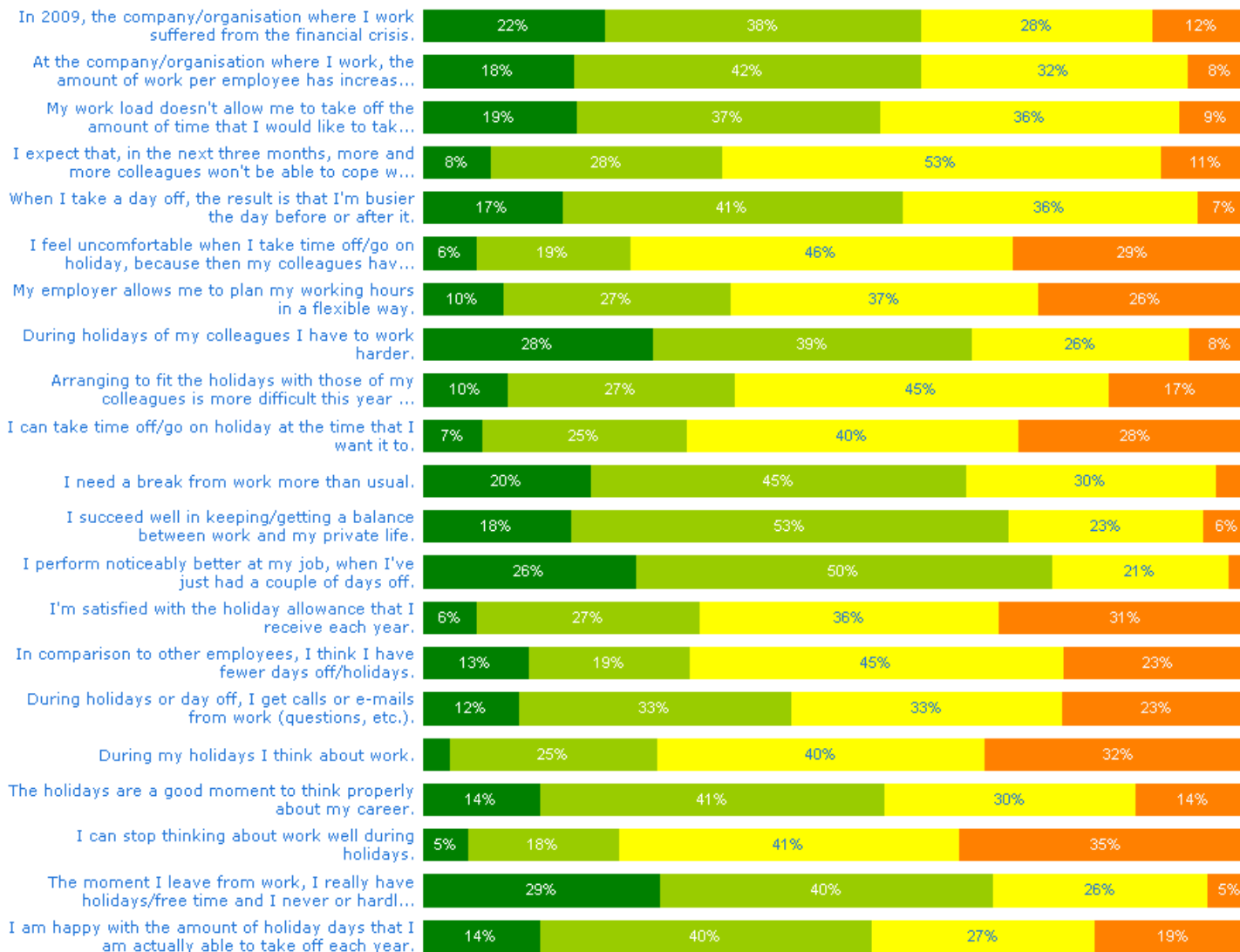
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- chapter 2: mobility
- chapter 3: satisfaction
- chapter 4: personal motivation

# Argentina



## Press statements



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 ■ MISSING

- 6 out of 10 employees in Argentina say their company or organization has suffered from the financial crisis in the year 2009. That is a higher percentage than in many West-European countries.

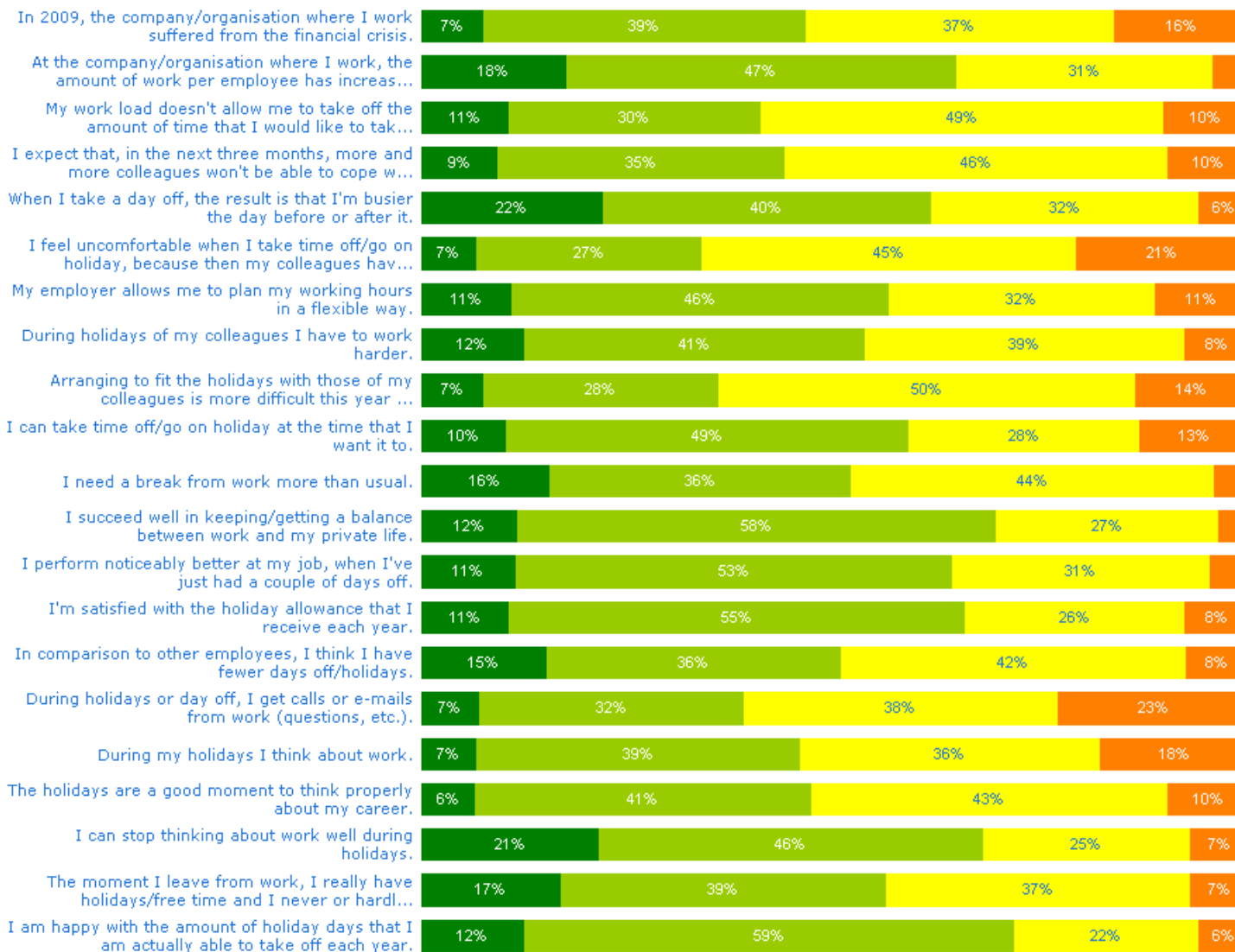
- 60% of the employees say that the workload per employee has increased in the last three months. Furthermore, 56% states that the workload does not allow them to take off the amount of time they would like to take off in the upcoming three months.

- Although most Argentines succeed well in keeping a balance between work and private life (71%) only 23% can actually stop thinking about work during their holidays. On the other hand, 69% say that the moment they leave work, they really have holidays/free time and they never or hardly ever think about work.

# Australia



## Press statements



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- Compared to the United States and Canada, less Australian employees think their company or organization suffered from the financial crisis (49% and 56% vs. 46%).

- According to 65% of the employees the workload has increased in the last three months.

- One third of the Australian employees feel uncomfortable when taking time off, because colleagues have to take over their work.

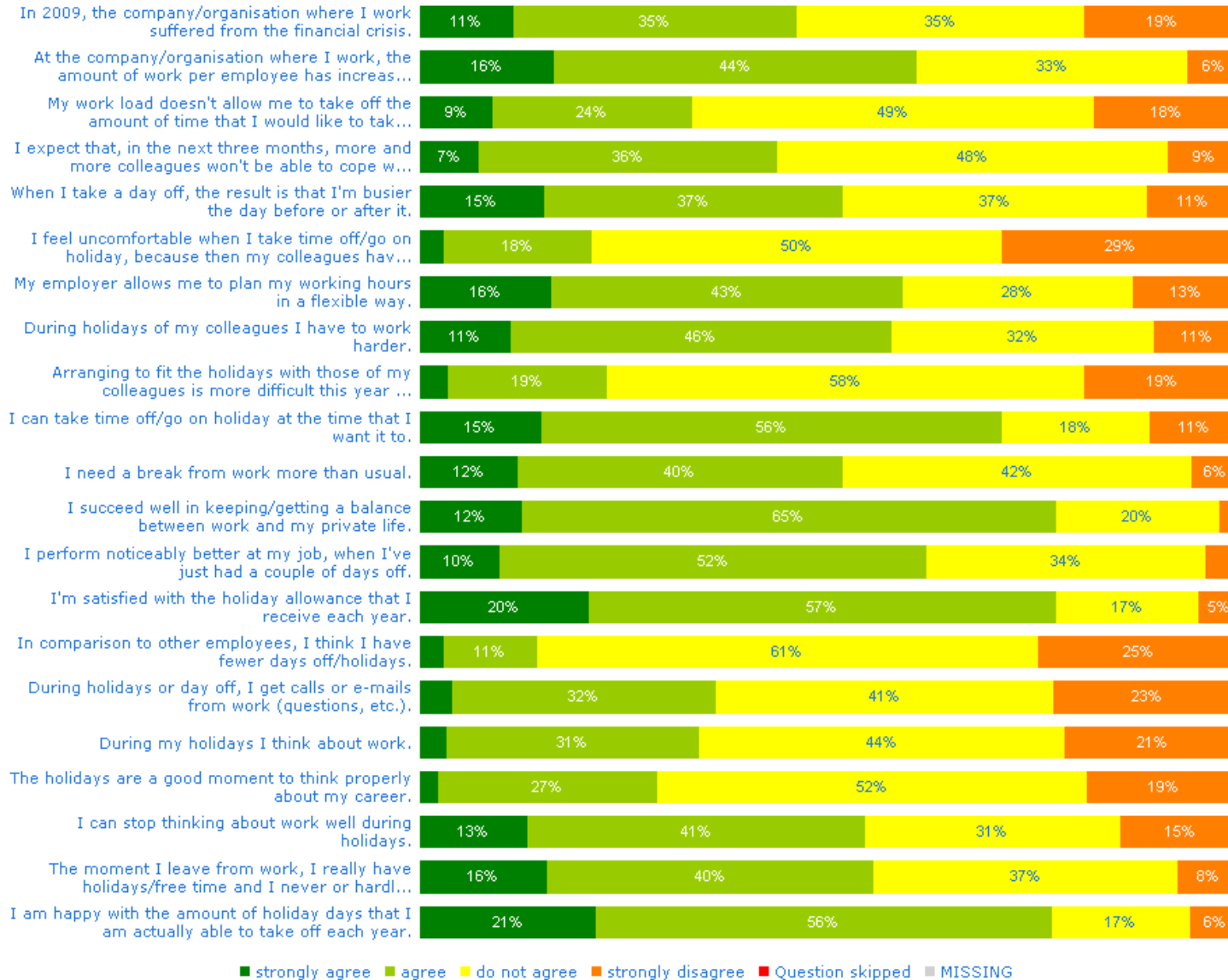
- Most of the employees are able to plan their work hours in a flexible way (57%). This is higher than in the US and Canada (53% and 52%).

- A majority of 70% succeeds well in keeping a balance between their work and private life. A similar % is also satisfied with the holiday allowance and the number of days they are able to enjoy each year.

# Belgium



## Press statements



- 46% of the Belgian employees state their company has suffered from the financial crisis in the year 2009. That is a little more than in Luxembourg (40%) and a little less than in the Netherlands (51%).

- More than 7 out of 10 employees (71%) state they can take time off or go on holiday at the time they want to. Furthermore, 77% of all employees is satisfied with the holiday allowance they receive each year and the same percentage is satisfied with the number of days off that they are actually able to enjoy each year.

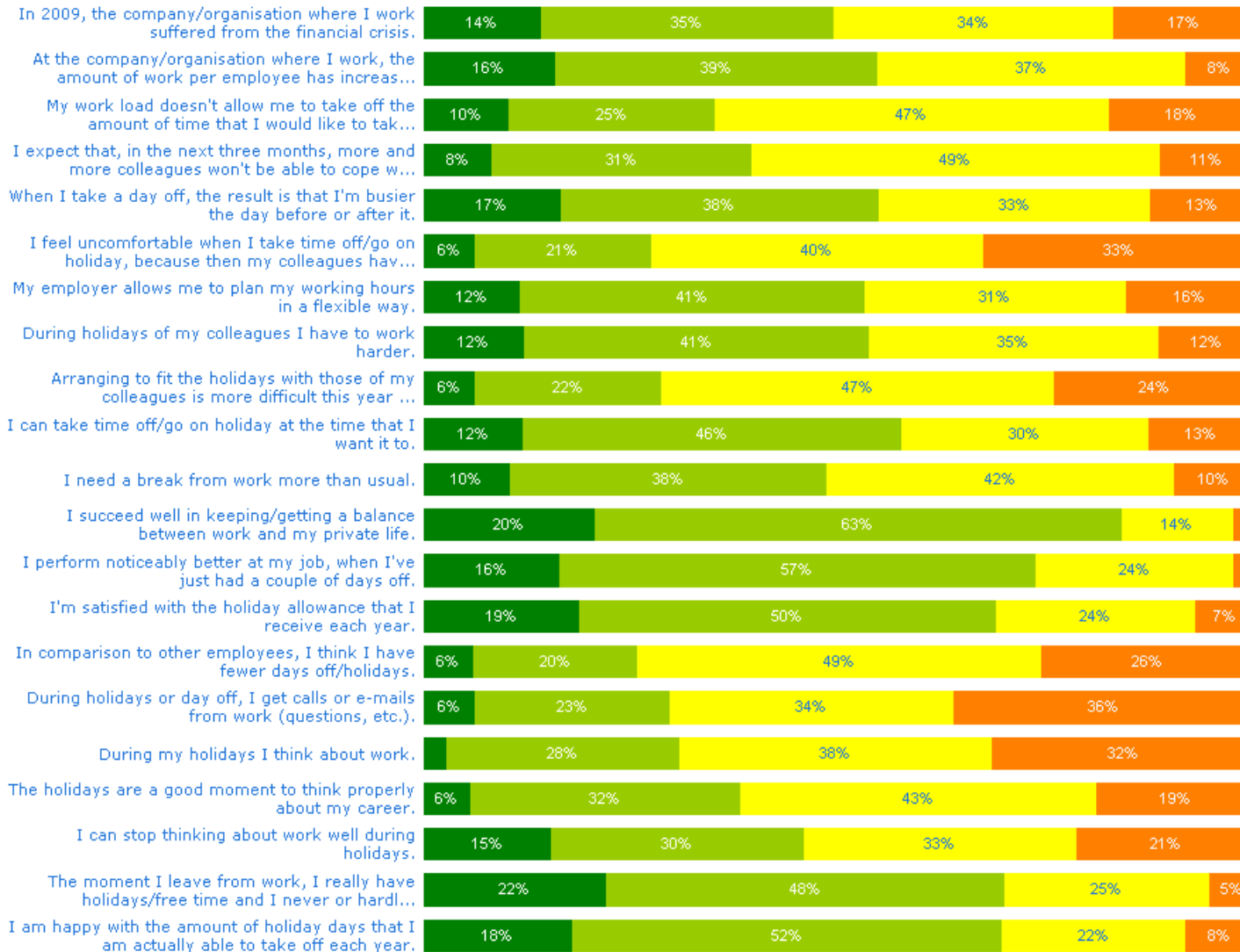
- Over three quarters (77%) of the Belgian employees think they succeed well in balancing work and private life.

- Only two out of 10 Belgian employees feel uncomfortable when going on holiday, because colleagues have to take over their work.

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## Press statements



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- Almost half of the Canadian employees think the company or organization they work for suffered from the financial crisis (49%).

- The day before and after a holiday or a day off, employees feel they have to work harder and are more busy.

- A fast majority of 83% thinks they succeed in balancing their work and private life.

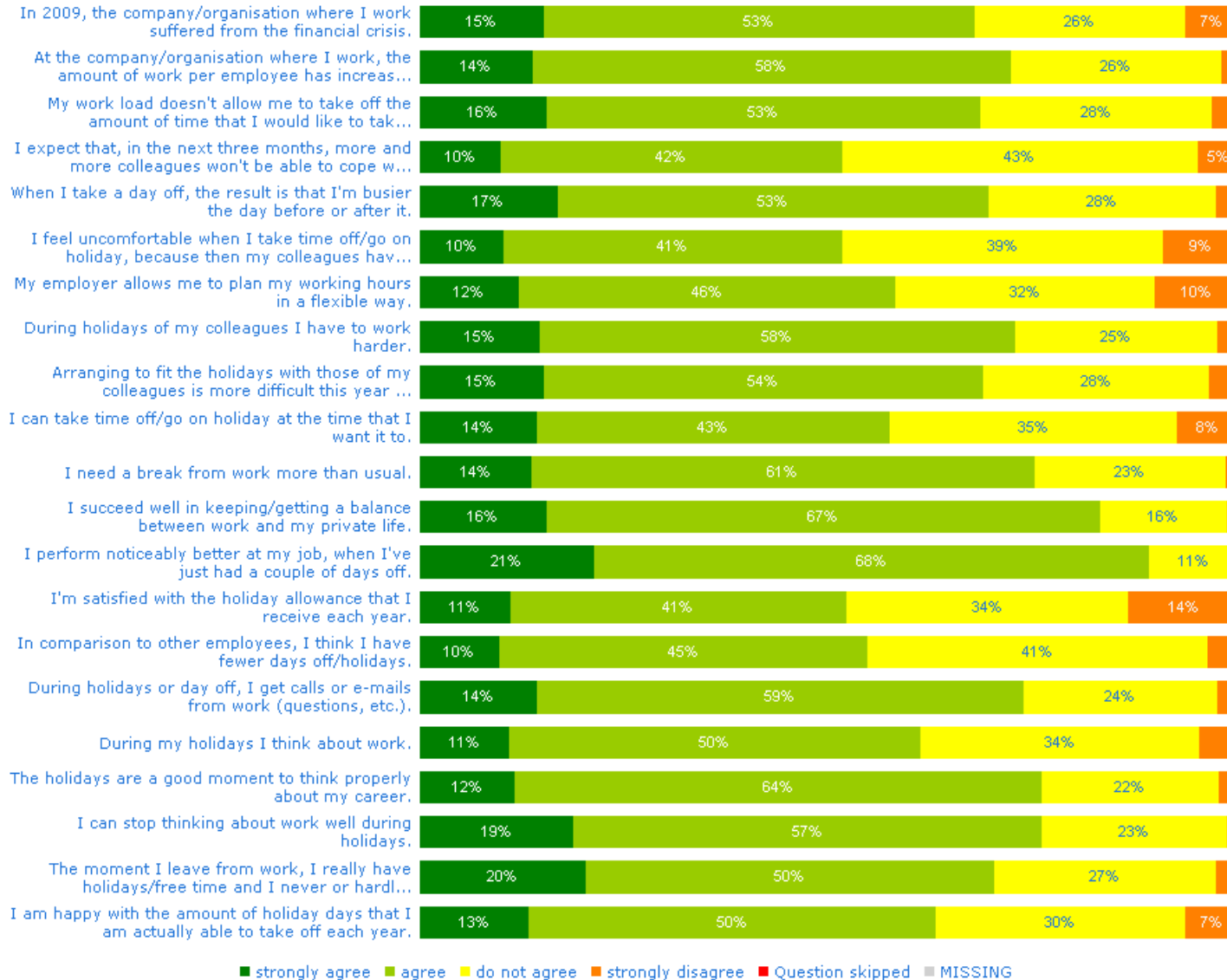
- 73% of the Canadian employees also perform noticeably better at their job when they have had a few days off.

- Almost the same % is satisfied with the holiday allowance they receive each year (69%).

- When leaving from work, 7 out of 10 employees never or hardly ever think about their work. This is much higher compared to Australia and the US, were only 56% and 58% feel that way.



## Press statements

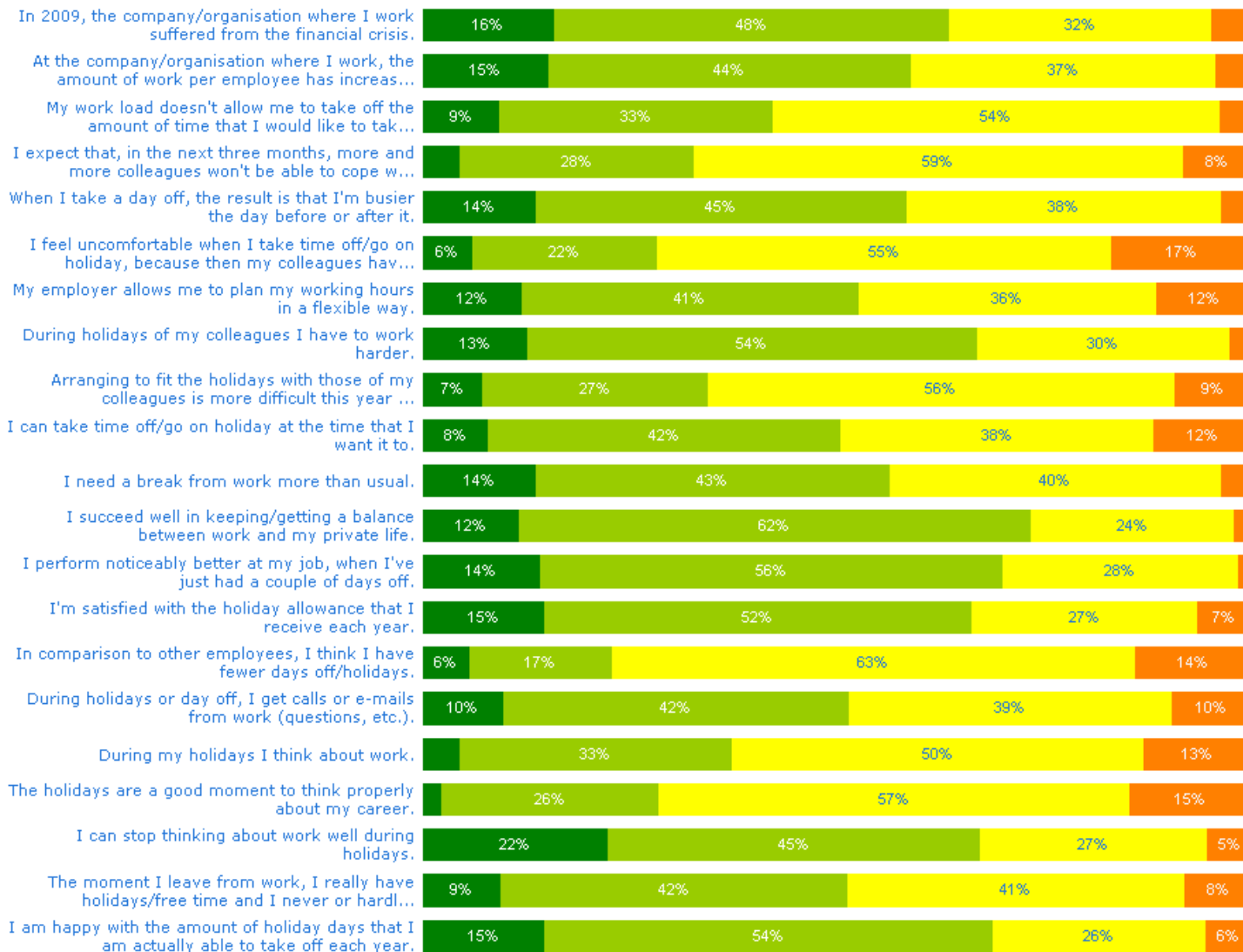


- Almost 70% of the Chinese employees believe their company suffered from the financial crisis.
- A fast majority of 72% also believes the workload has increased in the last three months.
- This could explain why over half of the employees feel uncomfortable when taking time off and leave work behind for colleagues (51%).
- 89% of the Chinese employees think they perform noticeably better after a few days off.
- Almost half of the employees is dissatisfied about the holiday allowance though (52%).
- When leaving work, 76% of the Chinese employees believe they can stop thinking about work. 61% of all employees admits they still think about work while on holiday.

# Czech Republic



## Press statements



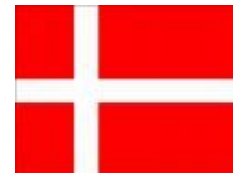
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- 64% of the Czech employees state their company or organization has suffered from the financial crisis. That is less than in Hungary (86%) and similar to Slovakia.

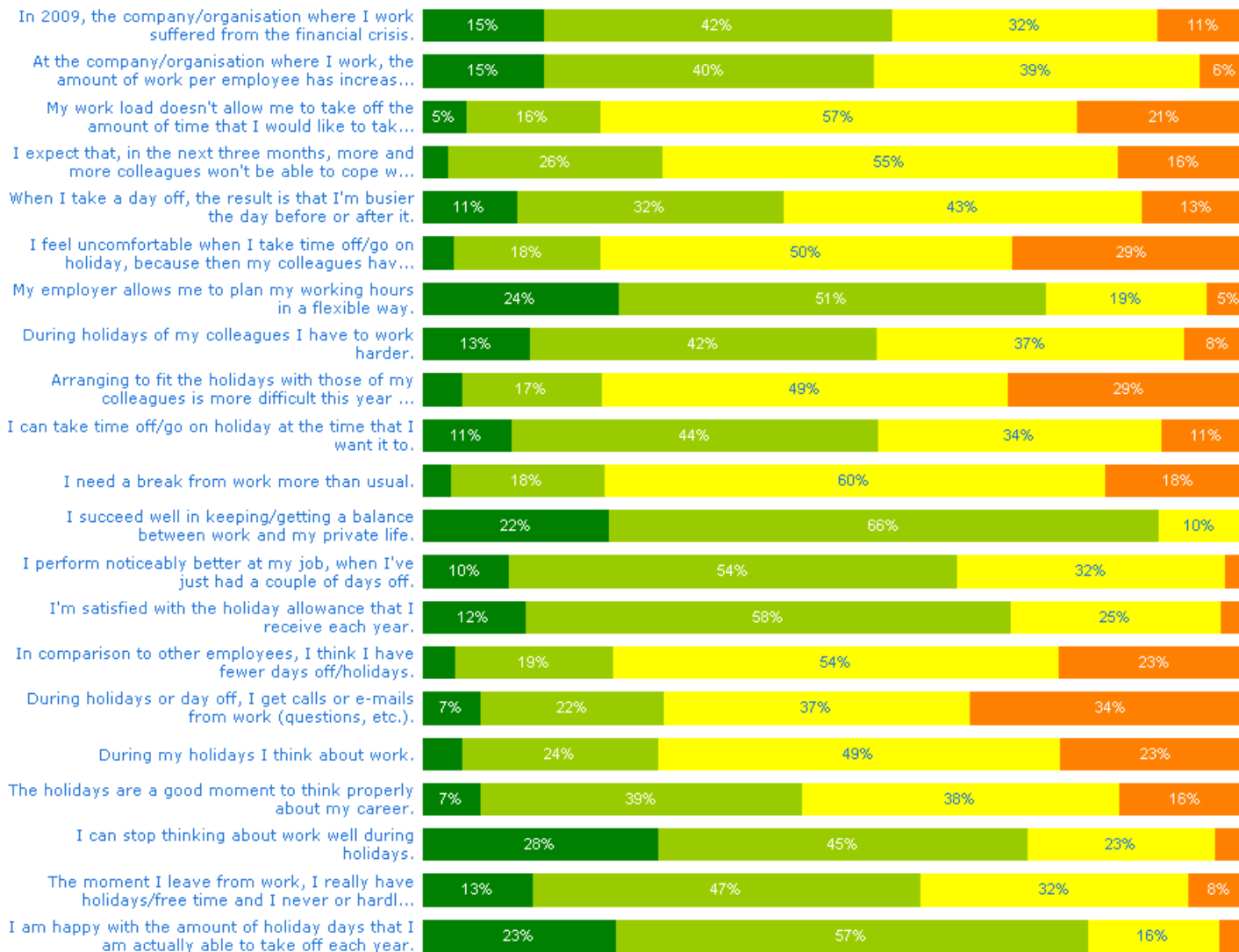
- Almost 7 out of 10 employees from the Czech Republic say that taking a day off means they will be busier the day before or after. That is quite high compared to other countries.

- Just like their colleagues in for instance Hungary, about 1 out of 2 employees say that during their holiday or days off they receive work related calls or emails (questions etc.).

- 69% of all Czech employees are happy with the number of days off they are actually able to enjoy each year.



## Press statements



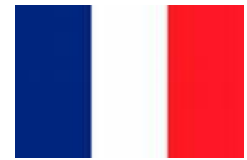
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- Danish organizations and companies suffered more from the financial crisis in 2009 (57%) than Swedish (40%) and Norwegian (23%) companies did according to employees.

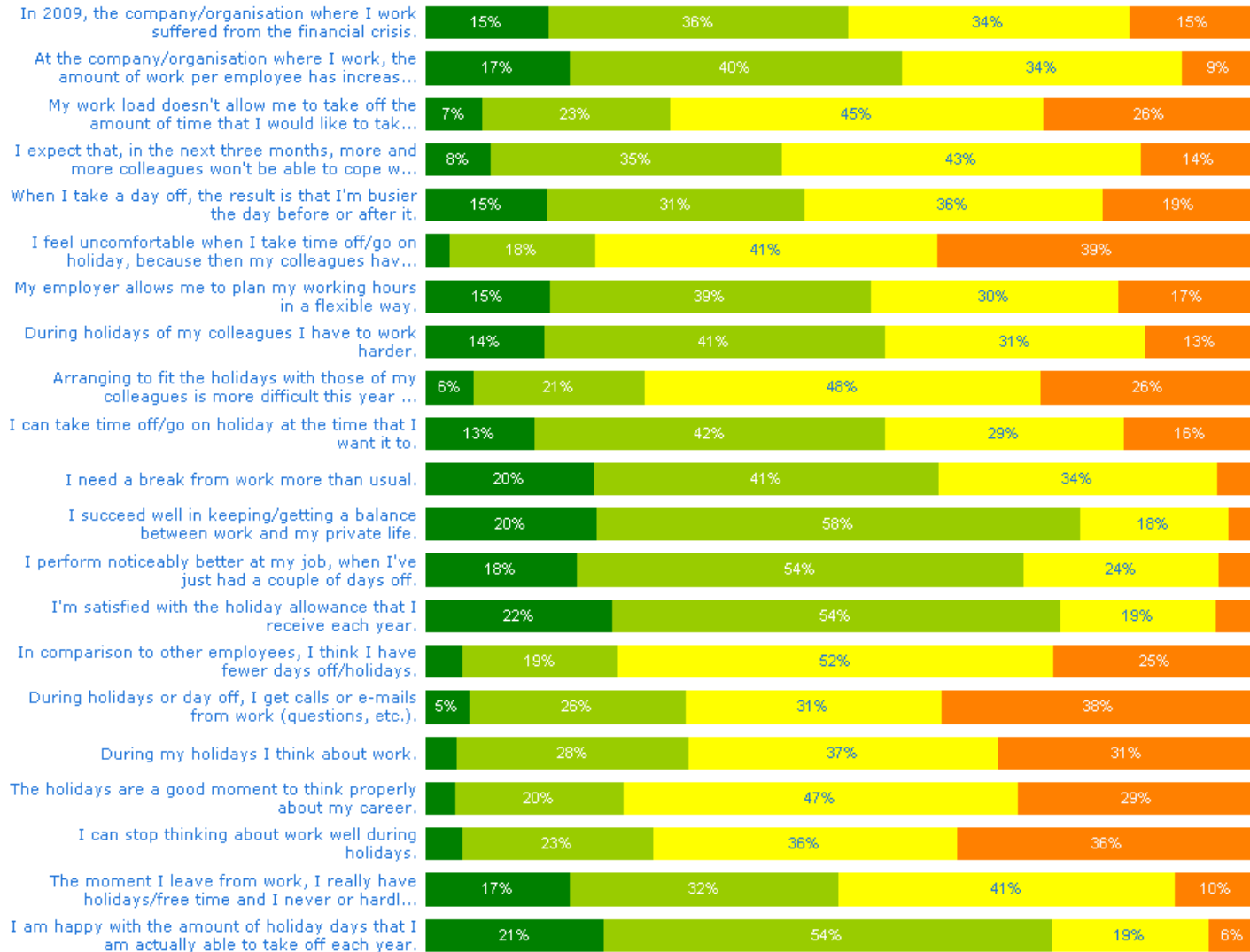
- This does not mean that Danish employers are less flexible towards their employees. 75% of the employees state that their employer allows them to plan their working hours in a flexible way.

- Almost 9 out of 10 (88%) say they succeed in keeping a balance between work and private life. Those percentages are higher than they are for the Norwegian and Swedish employees.

- Regarding the above, it is no surprise that 80% of the Danish employees are happy with the number of days off that they are actually able to enjoy each year.



## Press statements



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- More than half of the French employees believe their company suffered from the financial crisis (51%).

- Almost 8 out of 10 French employees think they succeed in balancing their work and private life

- Only 30% of the employees feel they can not take time off because of their workload. Compared to other European countries, this rate is quite low.

- This might explain why a majority of 80% does not feel uncomfortable taking time off and leaving work for their colleagues to do.

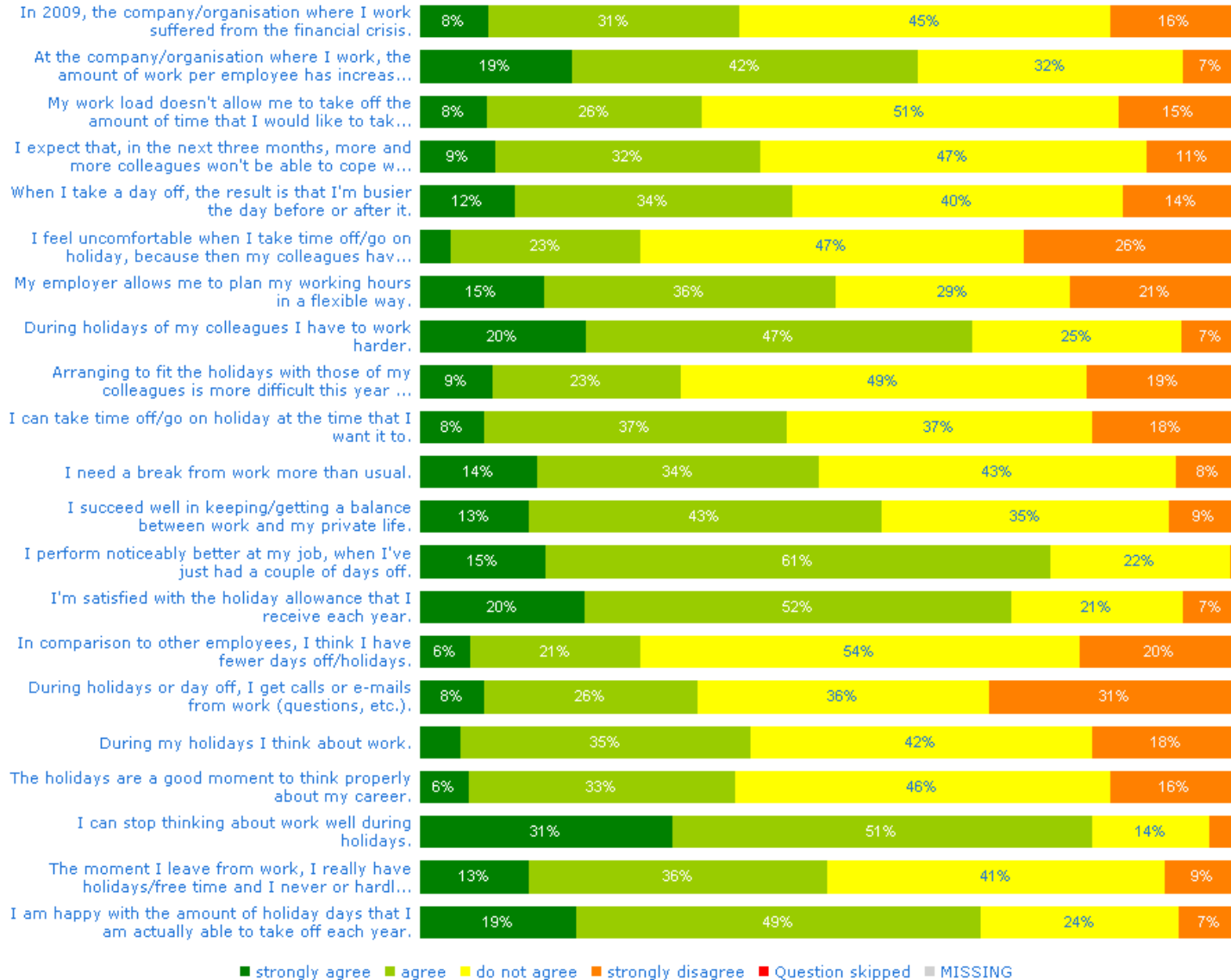
- During holidays, French employees receive less calls or e-mails from work compared to employees in other European countries.

- Striking is the fact that only 28% of the French employees are able to stop thinking about work while on holiday.

# Germany



## Press statements



- Only 39% of the German employees think the company they work for suffered from the financial crisis. This is significantly lower than in other European countries.

- In all West-European countries, the workload per employee has increased. 61% of the Germans state this is also the case in their company or organization

- Furthermore, not all employees are able to take time off when they want to.

- Employees feel they perform better after having had a few days off.

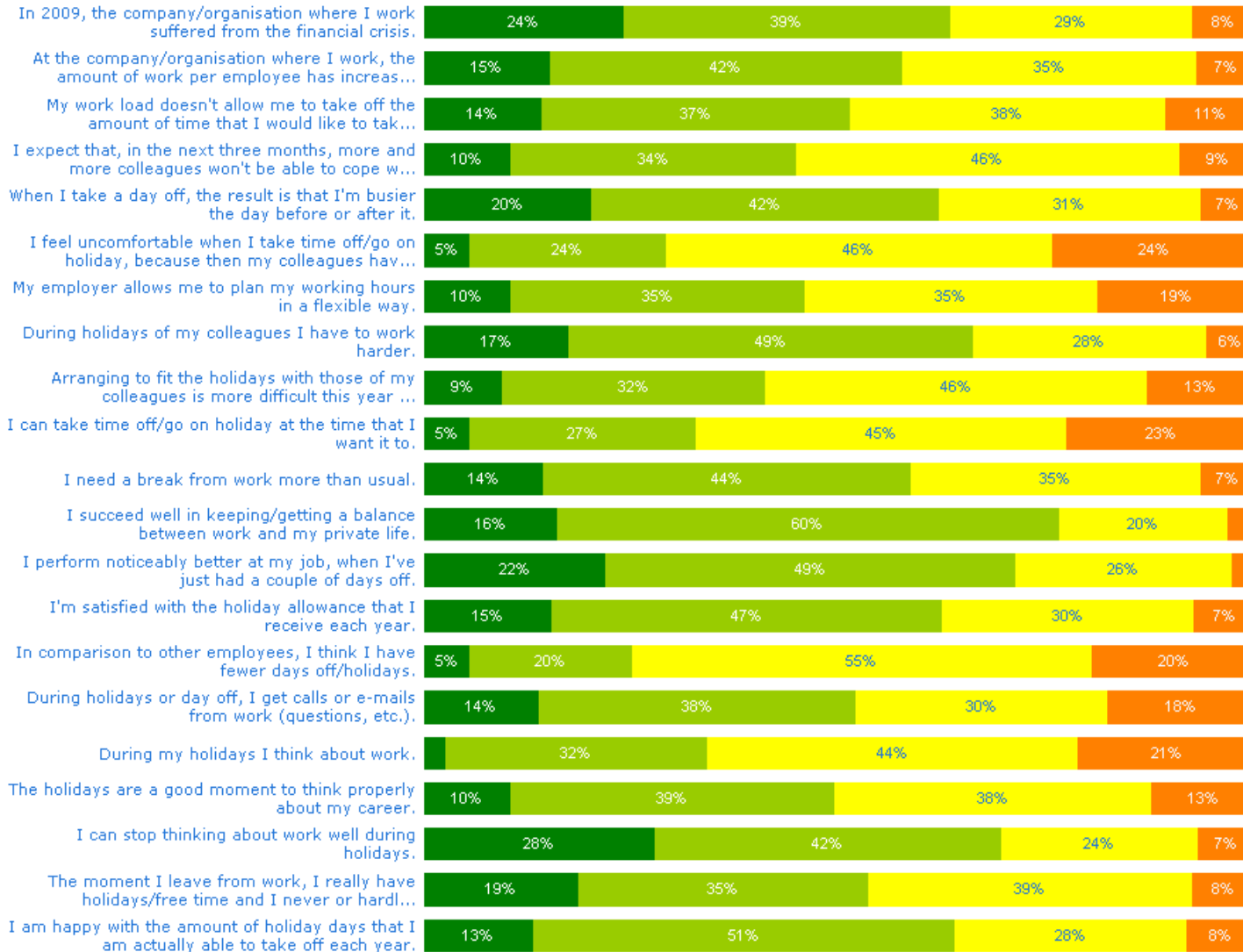
- Compared to some other West-European countries, Germans succeed less in balancing their work and private life (56% vs. for instance 78% in France).

- 82% of the German employees can stop thinking about work, during holidays.

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## Press statements



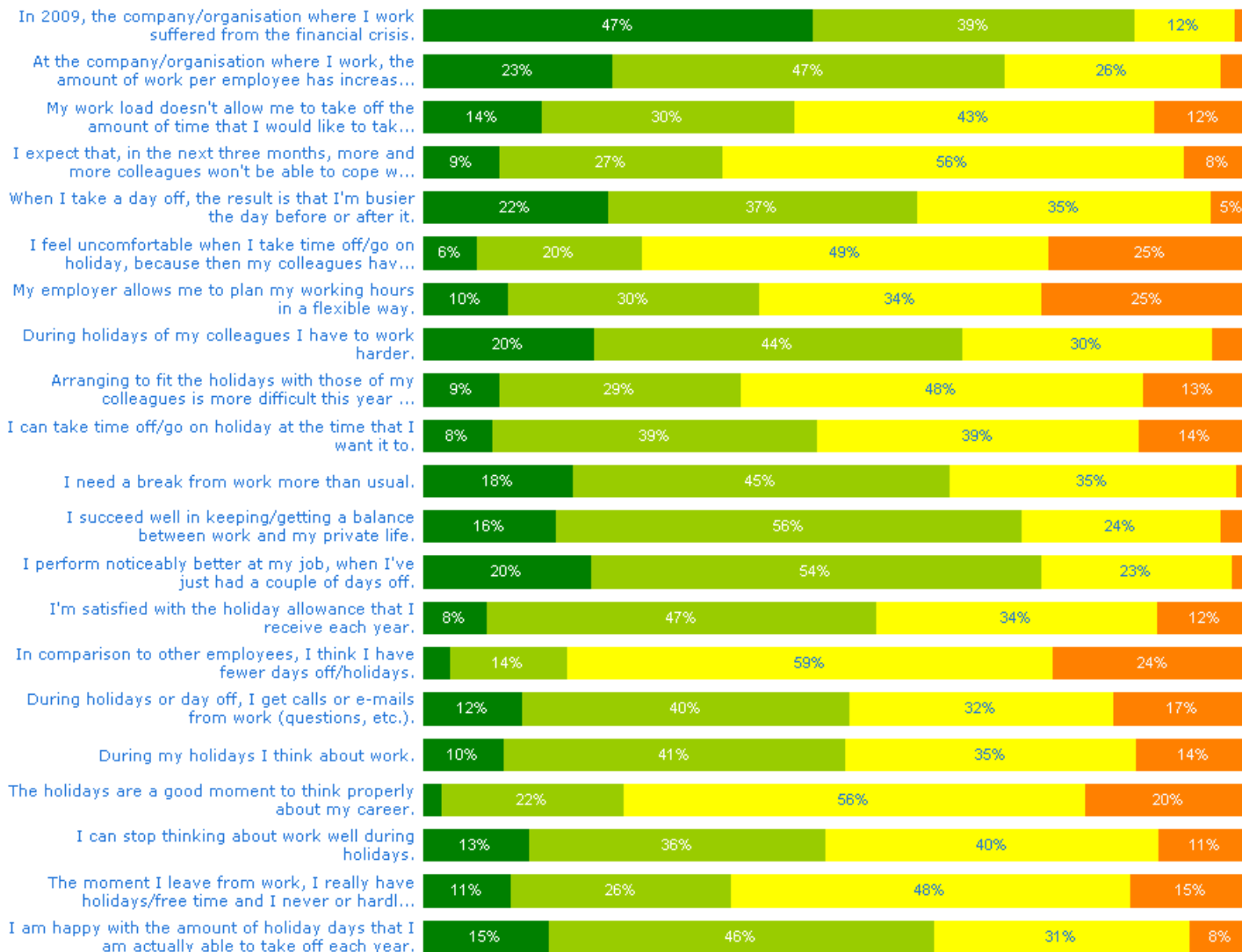
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- Many Greek companies and organizations suffered from the financial crisis (63%).
- Over 50% of the Greek employees feel they cannot take time off because of their workload.
- Two third of the Greek employees think they have to work harder when colleagues are on holiday.
- 7 out of 10 employees are not worried about their work taken over by colleagues when going on holiday and feel comfortable doing so.
- When taking a day off, a vast majority is busier the day before or after
- One third of the Greek employees can take a day off or go on holiday when they want to. In other countries this rate is higher, usually over 40%.

# Hungary



## Press statements



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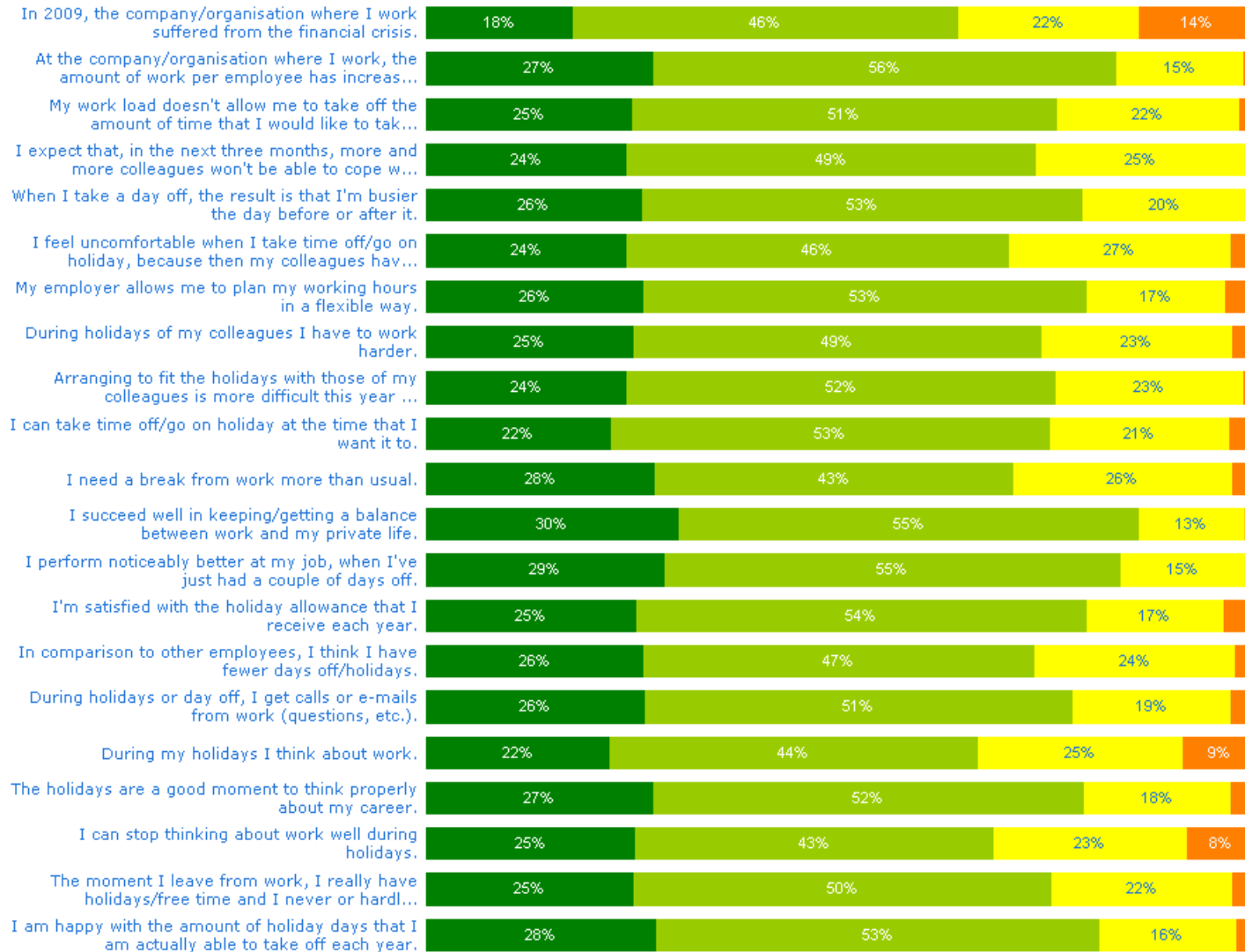
- Over 5 out of 6 Hungarian employees think their company suffered from the financial crisis in 2009. This is significantly more than in other countries such as for instance the Czech Republic (64%) or Slovakia (61%).

- 7 out of 10 employees state the workload per employee has increased in the last three months. However, this does not mean they are having more trouble to take off the amount of time that they would like to than employees in surrounding countries do.

- Employers in Hungary seem to be more strict than employers in surrounding countries. A quarter of the Hungarian employees strongly disagree with the statement that their employer allows them to plan their working hours in a flexible way.



## Press statements

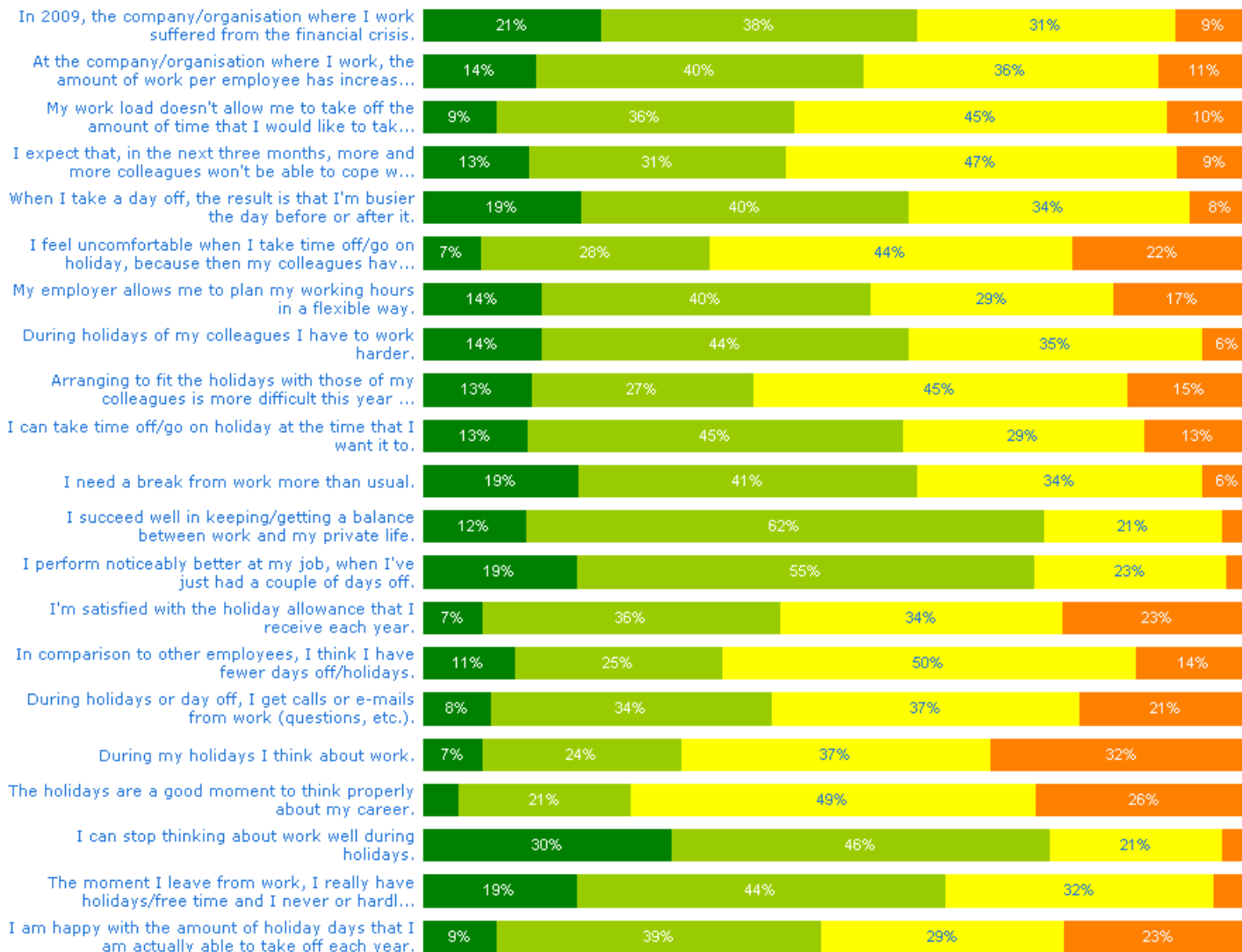


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- The majority of Indian employees believe their company suffered from the financial crisis.
- 83% also feels the workload has increased in the last three months.
- The day before and after a day off, the employee is busier (79%). This is also the case when a colleague takes a day off (74%).
- Five out of six Indian employees think they succeed in balancing work and private life.
- Still 77% receive calls or e-mails from work while on holiday and two-third of the employees thinks about work during holiday.
- The Indian employees also believe that holidays are a good moment to think about their careers.



## Press statements



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- Almost 6 out of 10 Italian employees think the company or organization they work for suffered from the financial crisis.

- Many Italians are able to plan their working hours in a flexible way. 54% is able to plan working hours flexibly and 58% of the Italians can take time off whenever they want to. In other Mediterranean countries, less than half of the employees is able to do so.

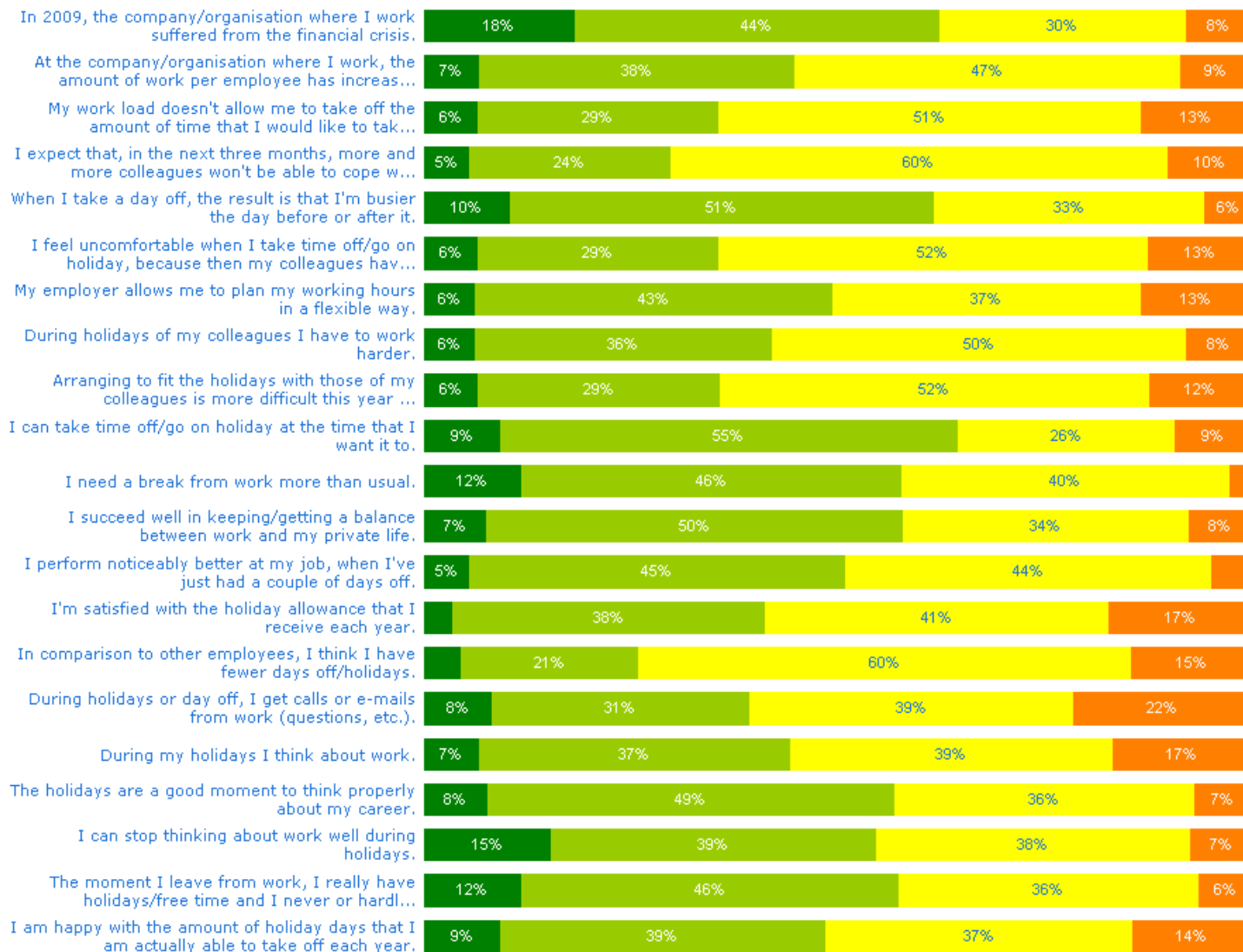
- Almost 6 out of 10 employees are not satisfied with the holiday allowance they receive each year.

- A majority of 74% performs noticeably better after having had a few days off.

- A comparable amount (76%) does not think holidays are a good moment to think about their careers.



## Press statements

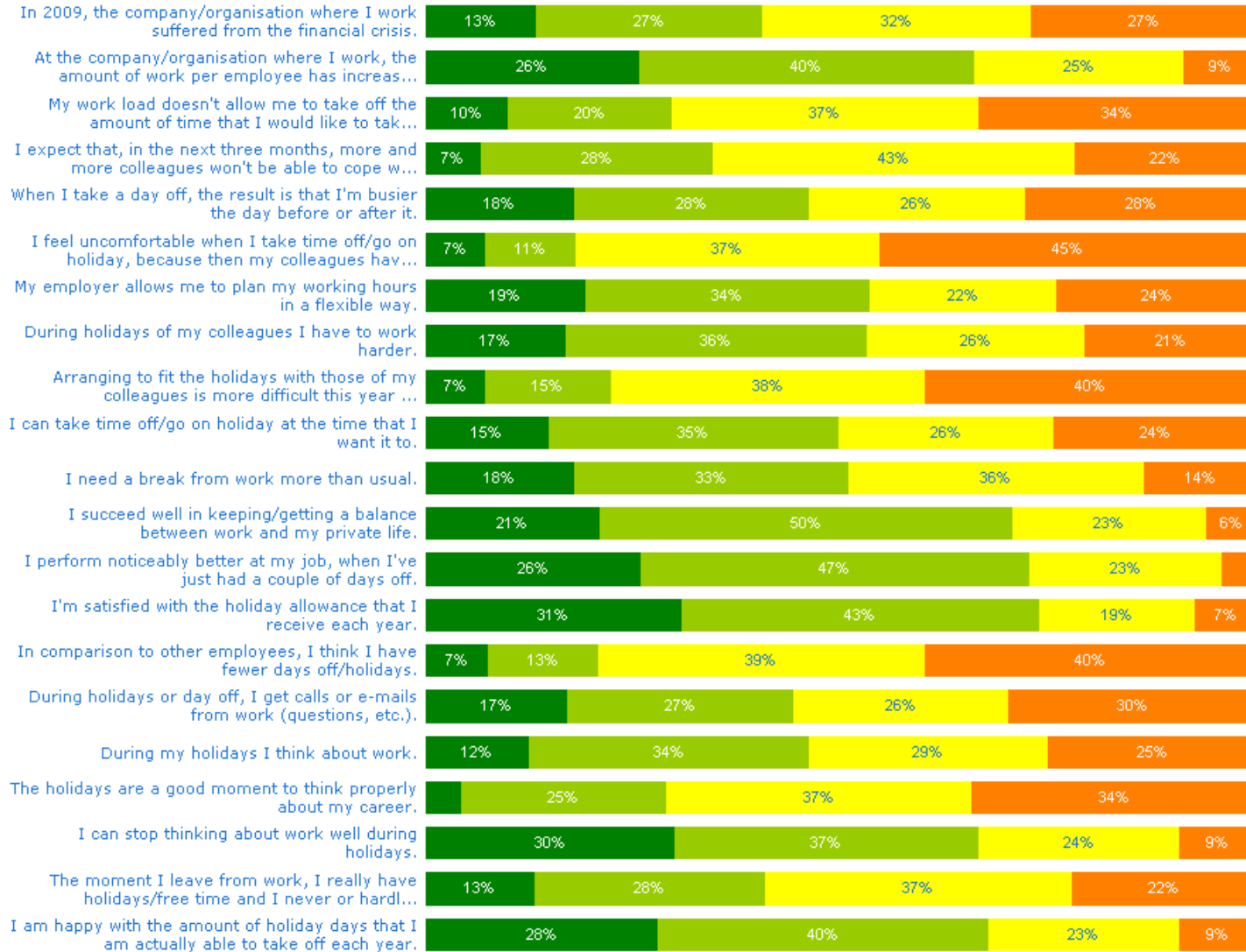


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- 62% of the Japanese employees think their company suffered from the financial crisis.
- Almost half of the employees (45%) believe the workload has increased in the last 3 months.
- 61% of the employees are busier before and after taking a day off. Over 4 out of 10 employees are also busier when colleagues take time off.
- 64 % of the Japanese employees are able to take time off when they want to.
- Only 57% of the Japanese employees succeed in balancing their work and private life. During holidays more than 39% receive calls or e-mails from work.
- 57% believe holidays are a good moment to think about their careers.

# Luxembourg

## Press statements



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- 40% of the employees in Luxembourg state that their company has suffered from the financial crisis in the year 2009. That is a little less than in Belgium (46%) and the Netherlands (51%).

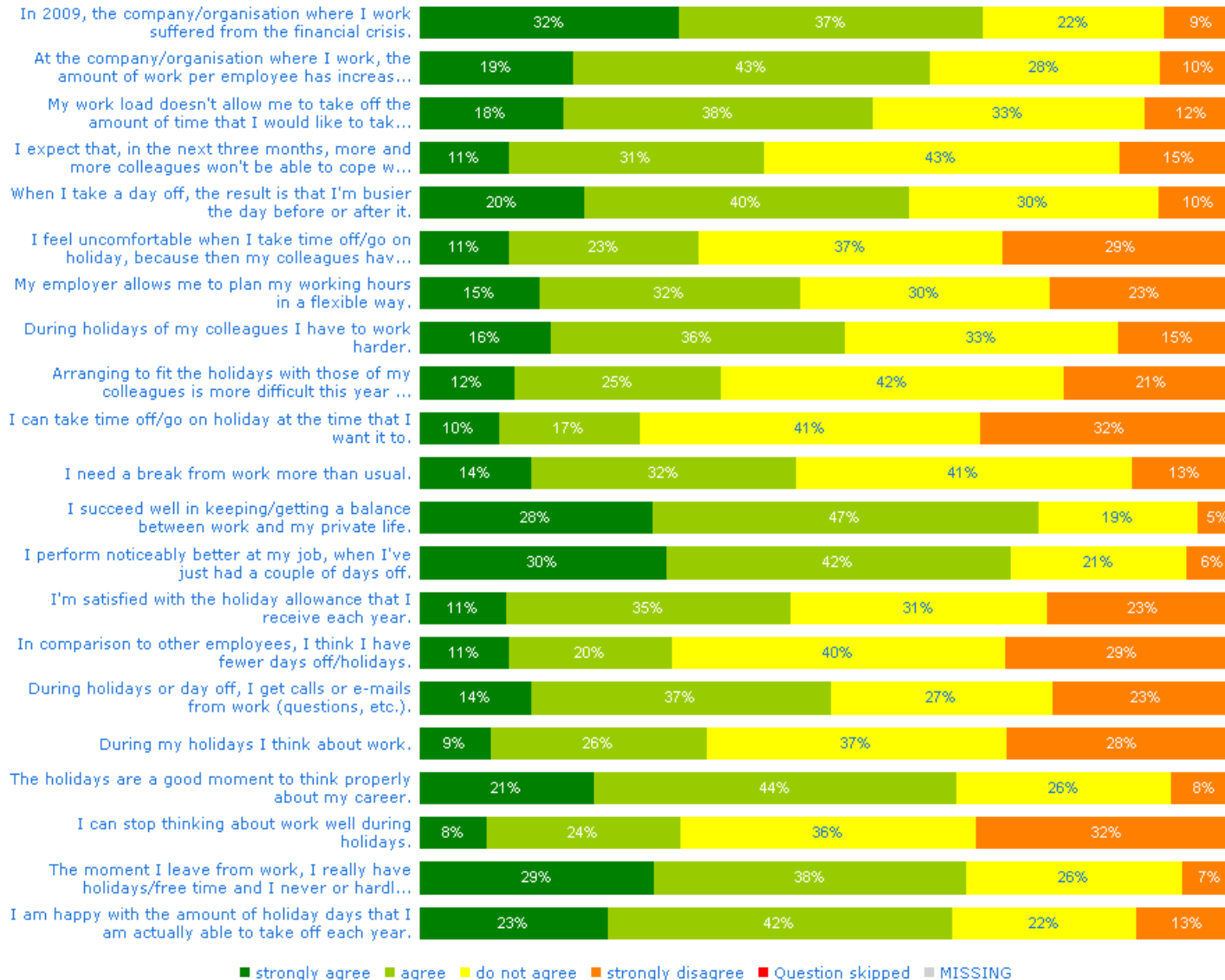
- Two third of the employees say that the workload per employee has increased in the last three months (66%).

- More than 7 out of 10 employees (71%) state they are able to keep a balance between work and private life. That is a good thing, because 73% of the Luxembourgers say they perform noticeably better when they have just had a few days off.

- Furthermore, 74% of all employees are satisfied with the holiday allowance they receive each year and two out of three (66%) are satisfied with the number of holidays that they are actually able to enjoy each year.



## Press statements



• According to many Mexican employees (69%) Mexican companies and organizations did really suffer from the financial crisis in the year 2009. Those figures are comparable to for instance some Eastern European and South European countries.

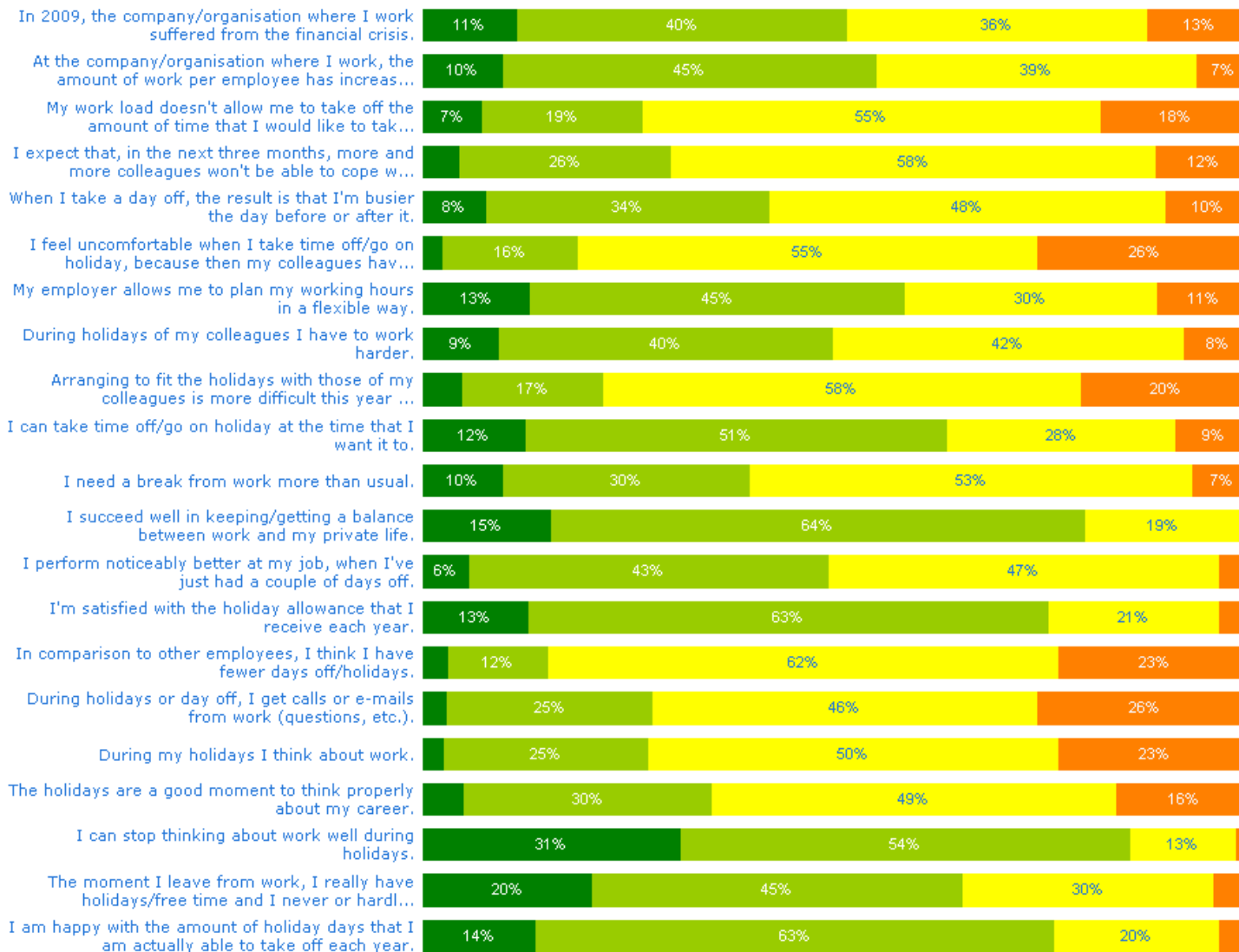
• 3 out of 4 Mexican employees say they are able to keep a balance between work and private life. That is a good thing, because 72% of the Mexicans say they perform noticeably better when they just had a few days off.

• For most Mexicans (65%) the holidays are a good moment to think properly about their careers.

# Netherlands



## Press statements



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- More than half of the Dutch employees (51%) say their company or organization has suffered from the financial crisis. That is more than in Belgium (46%) or Luxembourg (40%).

- Dutch employees are able to keep a balance between work and private life (81%). However, Dutch employees do not always perform better after a few days off (49%).

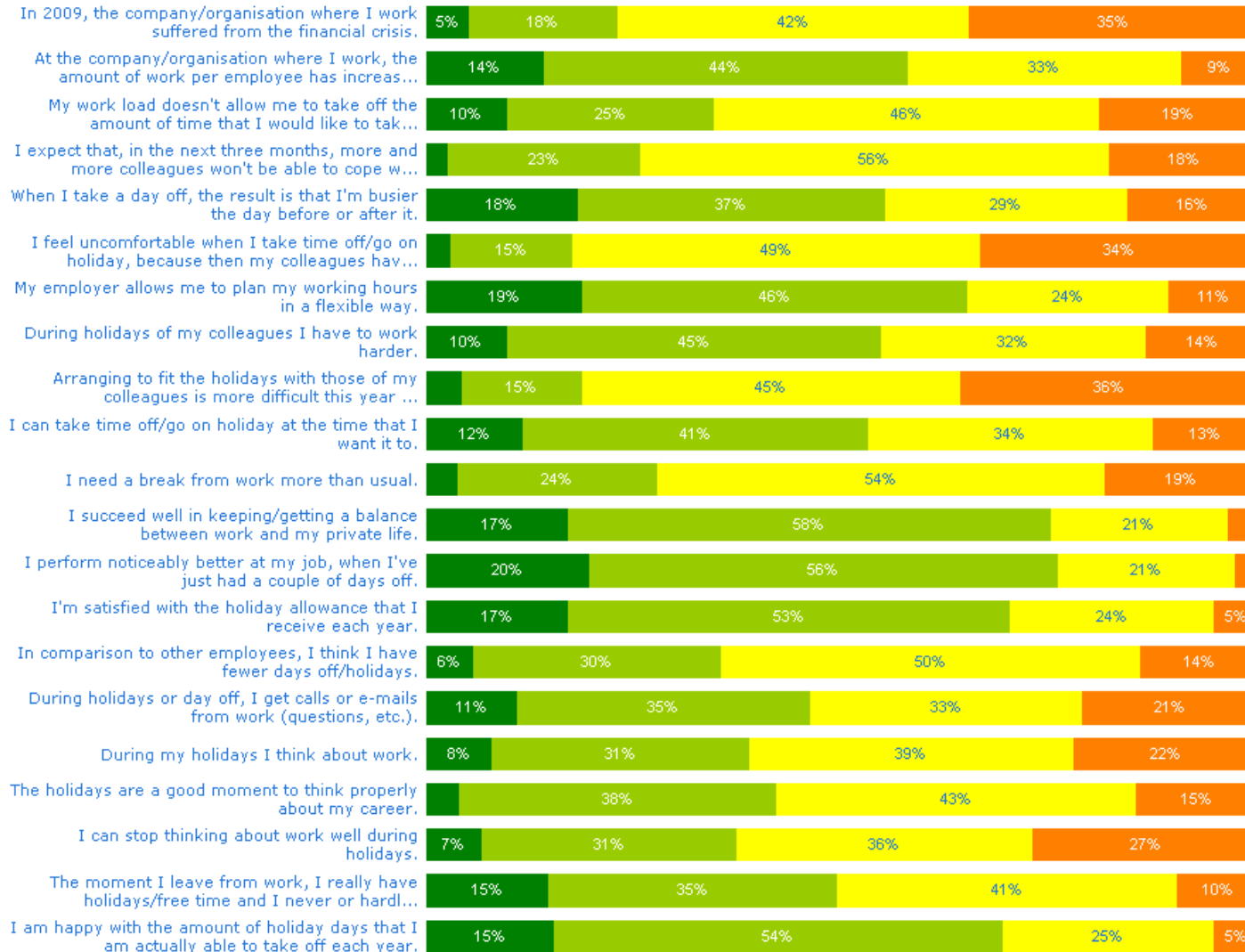
- Satisfaction with the holiday allowance is relatively high (76%) amongst Dutch employees.

- Dutch employees say they can easily stop thinking about work during the holidays (85%). That is something their colleagues from Belgium (54%) and Luxembourg (67%) find harder to do.

# Norway



## Press statements



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- In comparison to all other countries in this study, the Norwegian companies and organizations hardly suffered from the financial crisis in the year 2009 (23%). 1 out of 3 Norwegian employees even strongly disagree (35%).

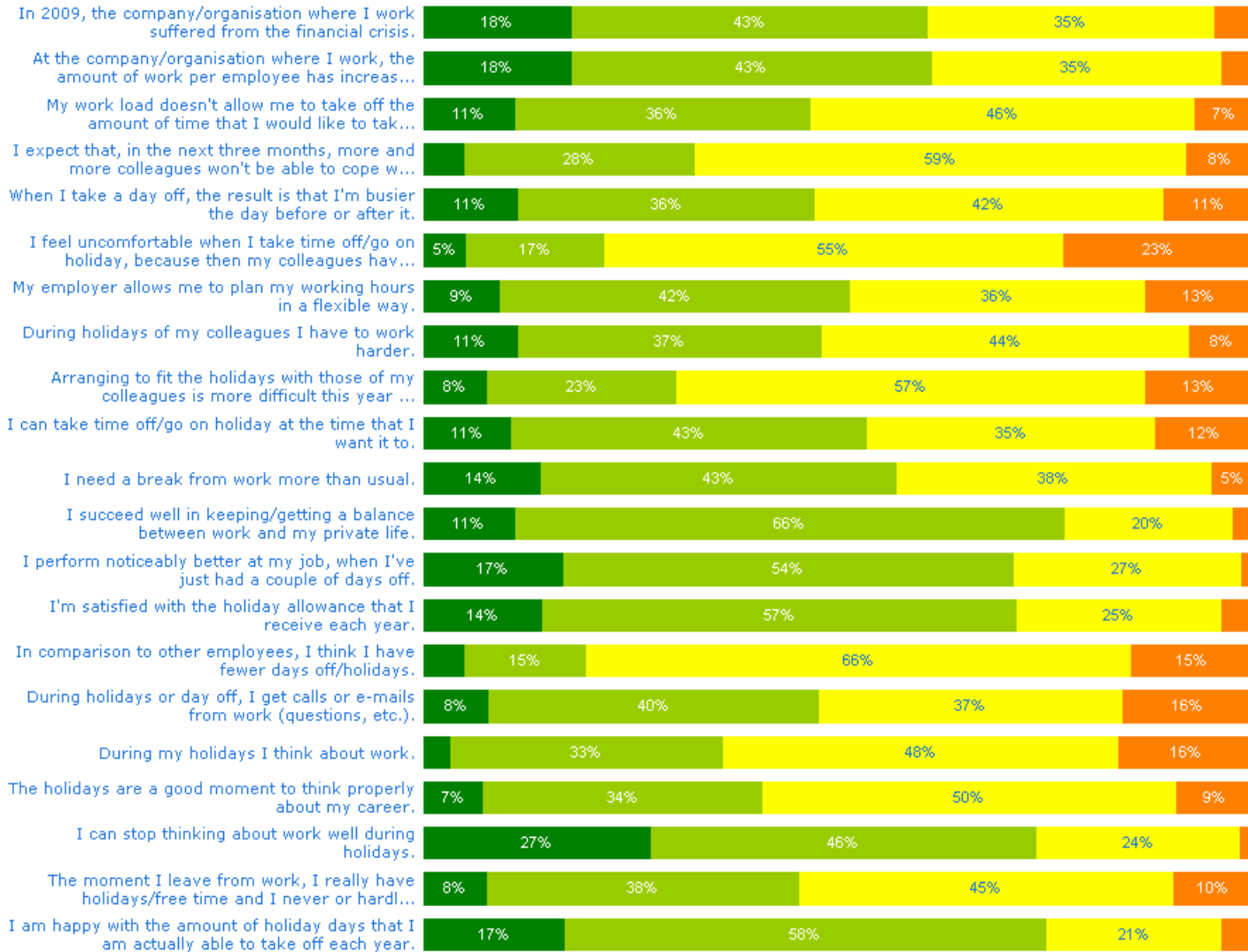
- 1 out of 3 employees state they are having more difficulties fitting their own days off with those of their colleagues.

- Norwegian employees do have more trouble to stop thinking about work during the holidays (38%) than Danish and Swedish employees.

- 76% of the Norwegian employees perform noticeably better after a few days off.



## Press statements



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- 61% of the Slovakian employees say their organization or company has suffered from the financial crisis in 2009.

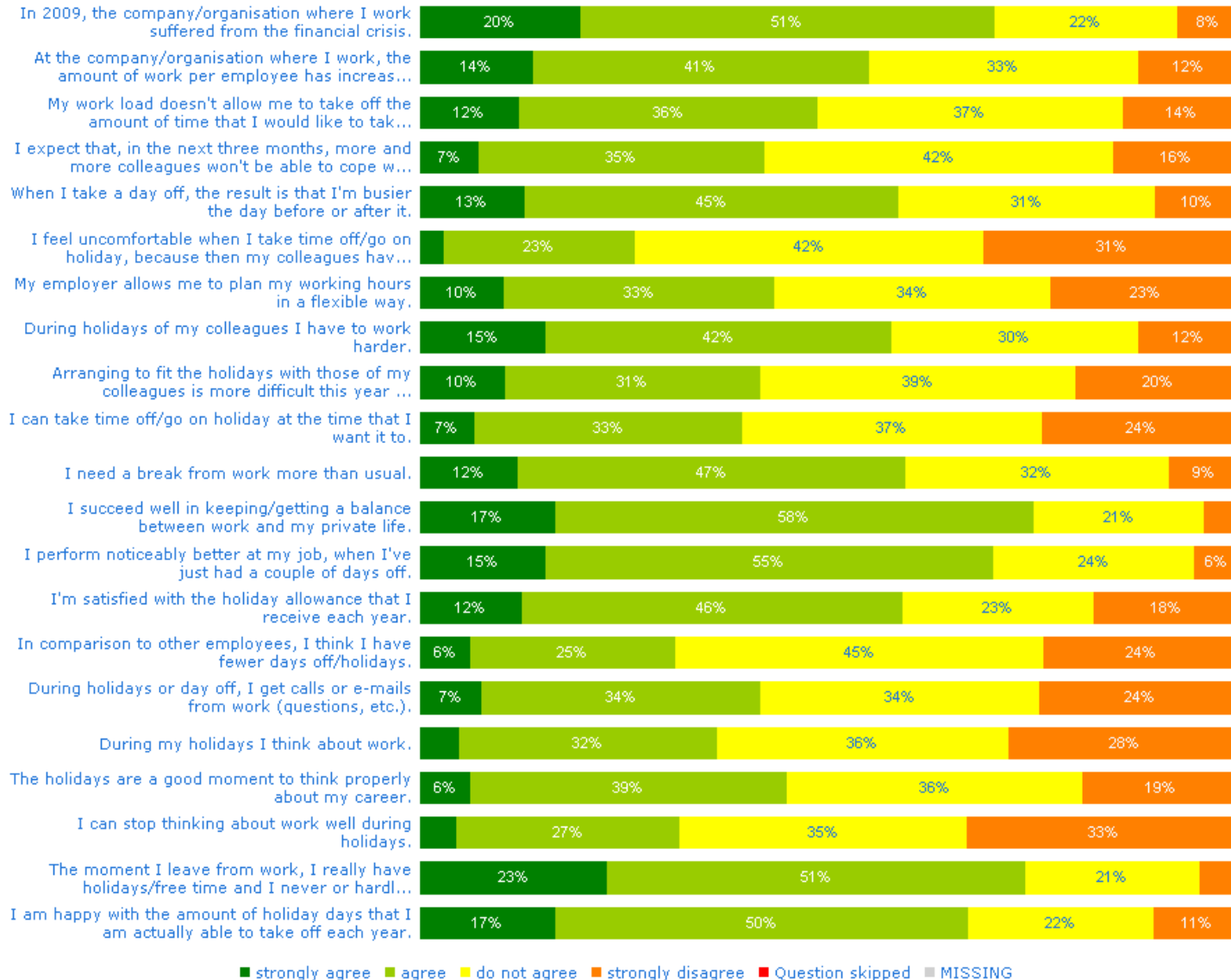
- Over 3 out of 4 Slovakian employees think they succeed in maintaining a good balance between work and private life. 71% also state that they perform noticeably better at their job when they just had a few days off.

- Almost three quarter of the Slovakian employees are able to stop thinking about work during their days off.

- 75% of the Slovakian employees are happy with the number of days off that they are actually able to enjoy each year.



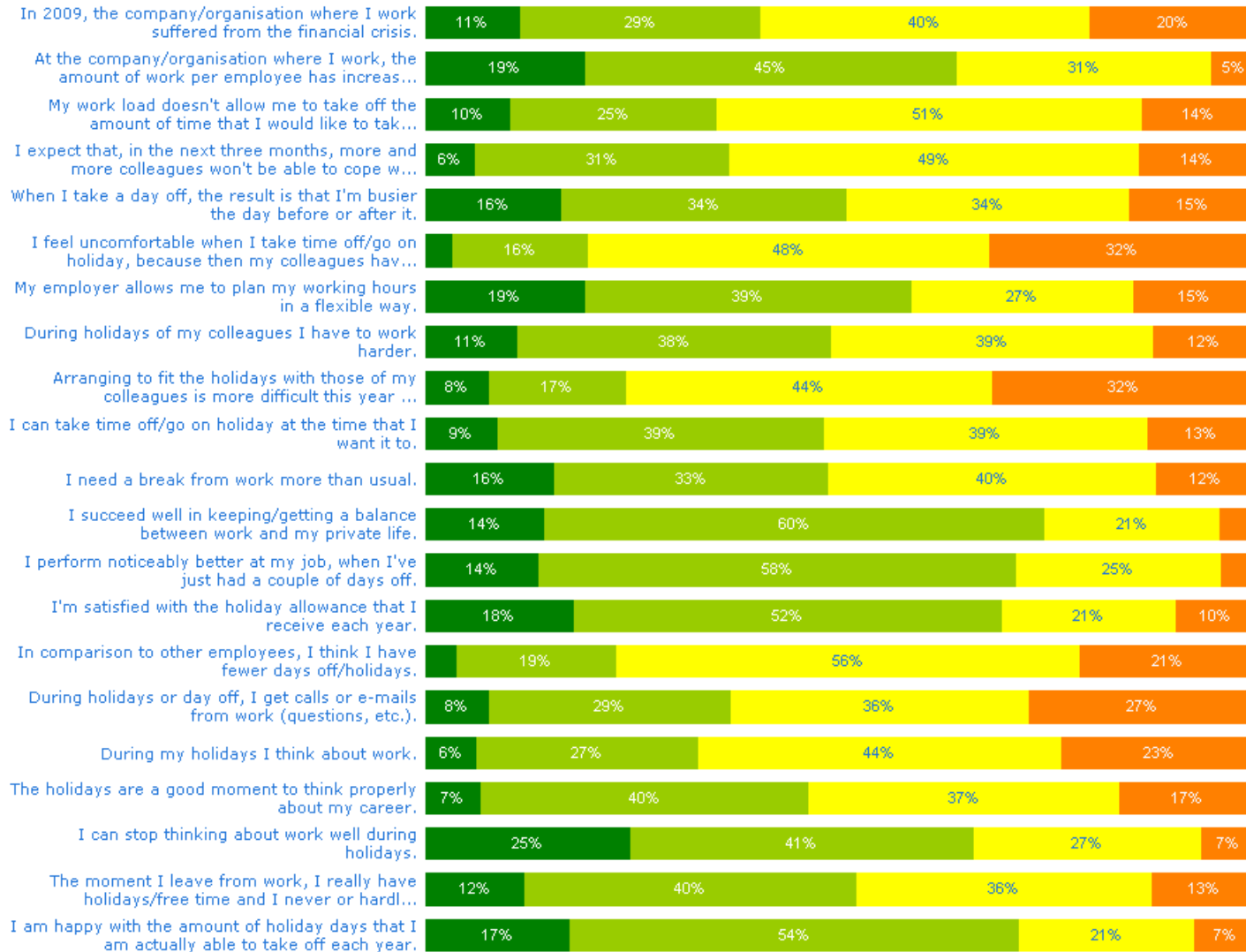
## Press statements



- According to employees, many Spanish companies or organizations suffered from the financial crisis (71%). This is less in other Mediterranean countries.
- The workload per employee has increased in the last three months according to 55% of all Spanish employees.
- Almost one out of three Spanish employees feel they have less days off compared to colleagues.
- 75% of the Spanish employees succeed in keeping a balance between their work and private life.
- Despite the good balance between their work and private life, a third of the Spanish employees still think about work while on holiday. This rate is higher than in surrounding countries like Italy for instance.



## Press statements



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- 4 out of 10 Swedish employees state that the financial crisis made their company or organization suffer in 2009. That is less than the Danish (57%) but much more than the Norwegians (23%).

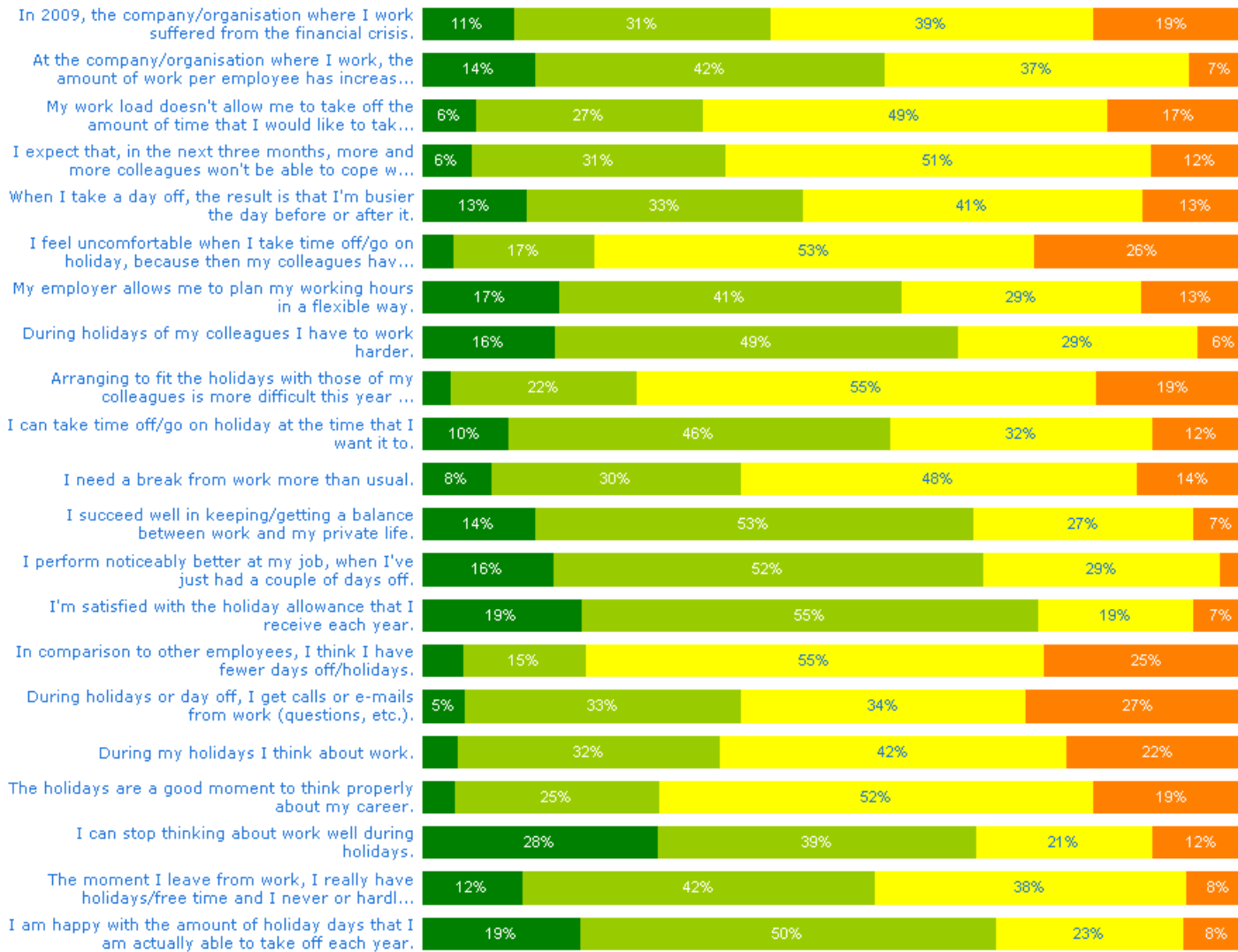
- 64% of the Swedish employees say that in their organization or company the workload per employee has increased in the last three months.

- 1 out of 5 employees feel uncomfortable when they take time off or go on a holiday because then their colleagues have to do their work.

- Three quarter of the Swedish people succeed in balancing work and private life. Two third of the Swedish employees do not think about work during days off.



## Press statements

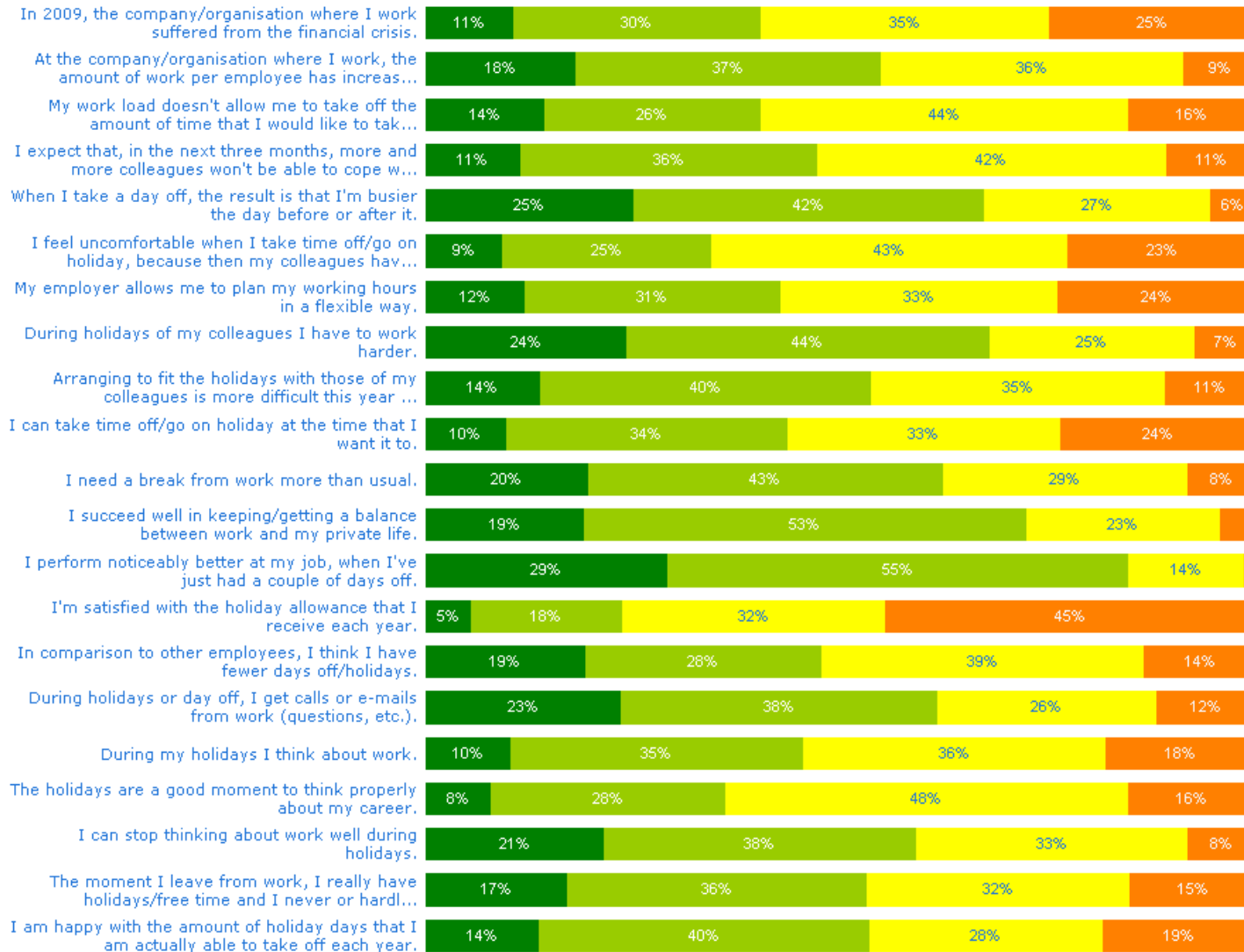


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- Only 42% of the Swiss employees believe their company suffered from the financial crisis. Compared to other West-European countries, this rate is quite low.
- 56% states the workload per employee has increased in the last three months.
- Like in most West-European countries, Swiss employees are quite satisfied with the holiday allowance they receive each year (74%).
- Only 21% of the employees feel uncomfortable taking time off and leaving work behind for colleagues. In some other West-European countries, this rate is higher (e.g. 35% in the United Kingdom)
- 1 out of 5 employees think they have fewer days off, compared to other employees.
- 67% of the employees can stop thinking about work during holidays.



## Press statements

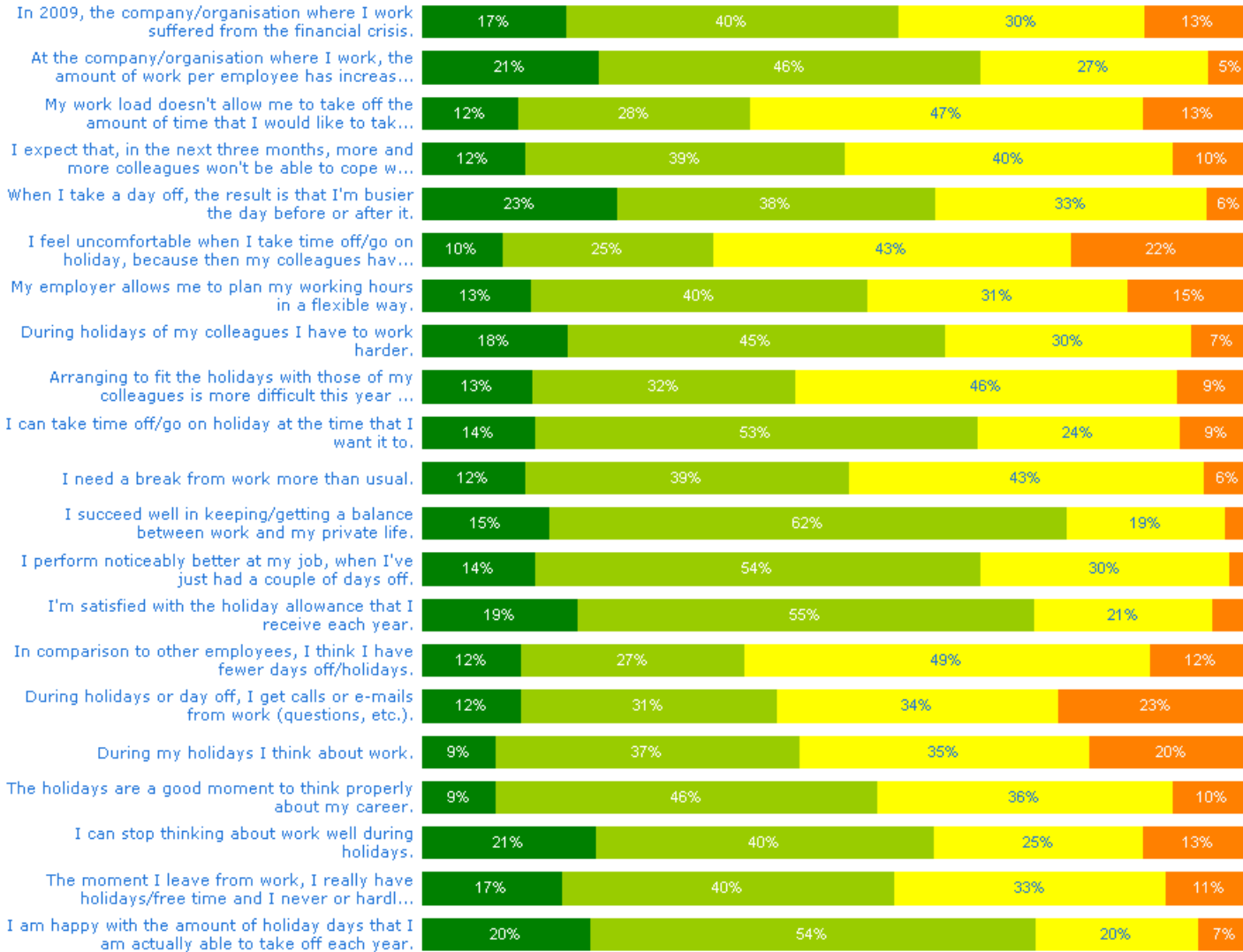


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- Compared to various surrounding countries, less Turkish employees think the company they work for suffered from the financial crisis (41%).
- More than in other Mediterranean countries, the Turks feel they can not take time off because of their workload.
- Before and after a day off, employees feel they have to work harder than usual. That is also the case when colleagues take a day off.
- About 5 out of 6 employees find they perform noticeably better after taking some days off
- Worldwide many employees are dissatisfied with their holiday allowance. In Turkey though, a fast majority is completely dissatisfied.
- Almost half of the employees think they have fewer days off compared to other employees.



Press statements



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- Over half of the UK employees think their company suffered from the financial crisis (57%). Compared to Germany and Switzerland, this rate is higher (39% and 42%).

- According to a fast majority, employees believe the workload has increased in the last three months (67%).

- This can explain why 1 out of 2 employees believe colleagues will not be able to cope with the workload in the next 3 months.

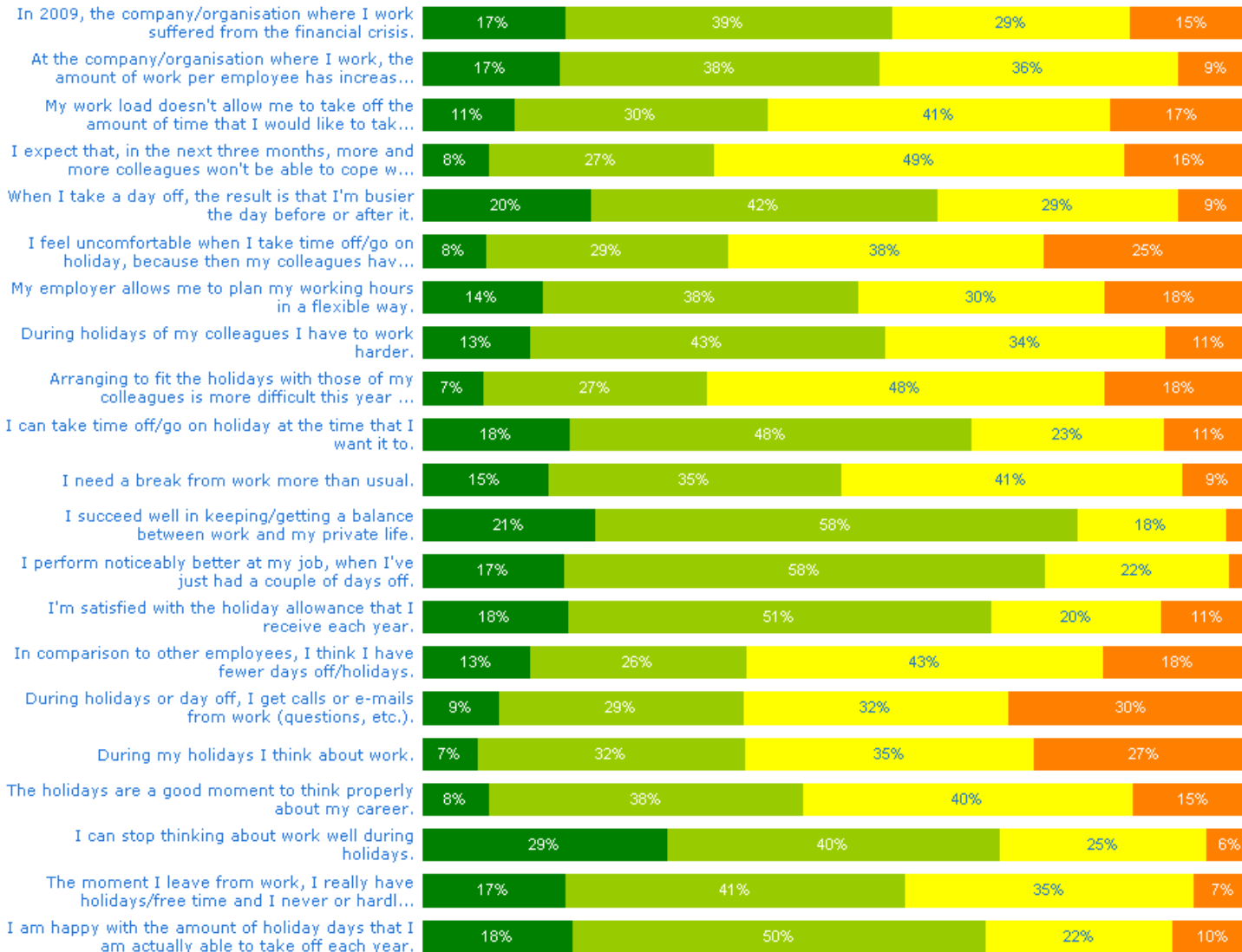
- Compared to other West-European countries, more UK employees are busier before and after taking a day off.

- UK employees seem to take over less work from colleagues than some of their colleagues in other countries, but catch up their own work when they are back from holiday.

- In the UK 77% of the employees think they succeed in balancing their work and private life.



Press statements



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• 56% of the American employees think their company suffered from the financial crisis. This rate is much higher compared to countries like Canada and Australia.

• More than 60% of the employees believe they are busier the day before or after taking a day off.

• Almost 80% succeeds in balancing their work and their private life.

• 3 out of 4 employees believe they perform better at work, when they have had a few days off.

• 66% of the American employees can take time off when they want to.

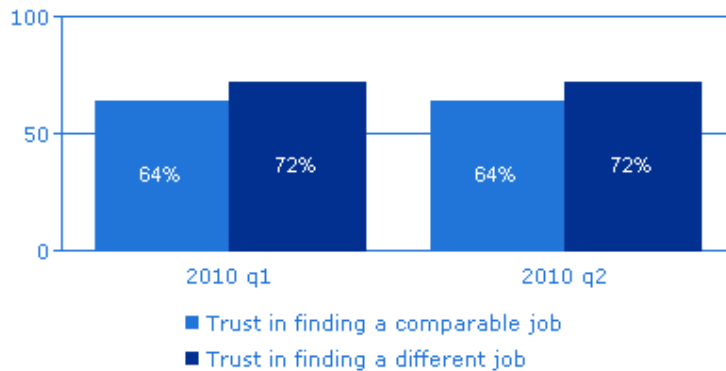
• 7 out of 10 American employees believe they can stop thinking about work during holidays. This is relatively high, compared to Canada.

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# confidence in finding a new job is stable worldwide

Trust



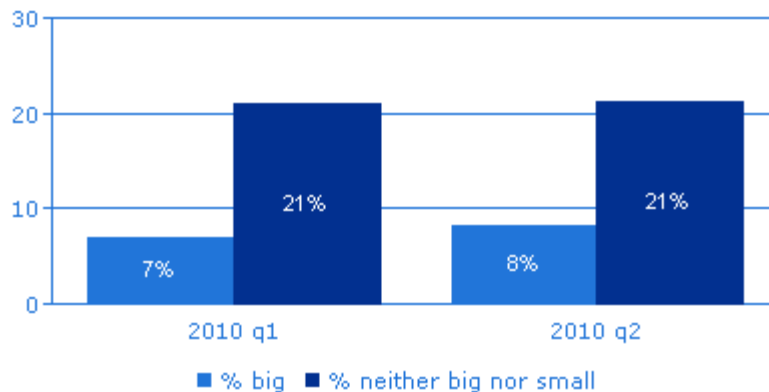
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Belgium	7%	
Denmark	10%	
Greece		7%
Norway	10%	
India		7%
Japan	9%	

Question:

Suppose you would have to look for another job now *with a different employer*. Do you think that within the next 6 months you could get *comparable work* with a *different employer*?

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

Fear of job loss

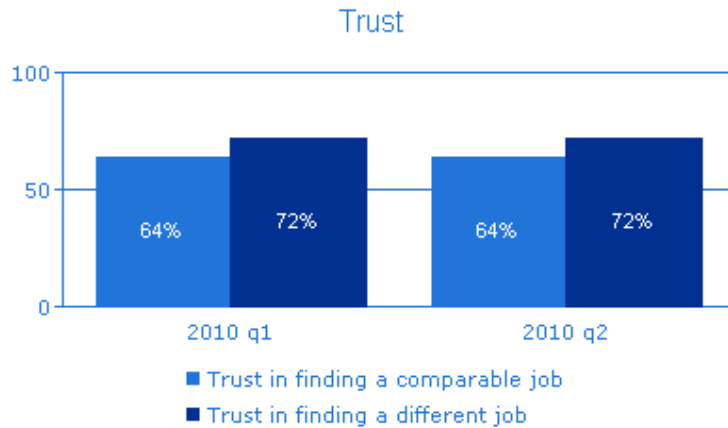


Changes	↑	↓
India (%big)	11%	
Greece (%big)	9%	

Question:

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

# confidence in finding a new job is stable worldwide; in Greece and India more employees think they will lose their job and/or will not find an new job within 6 months



The level of confidence that employees have in finding a new job has not changed in the last three months. Also employees estimate that the chance of job loss is equal to three months ago.

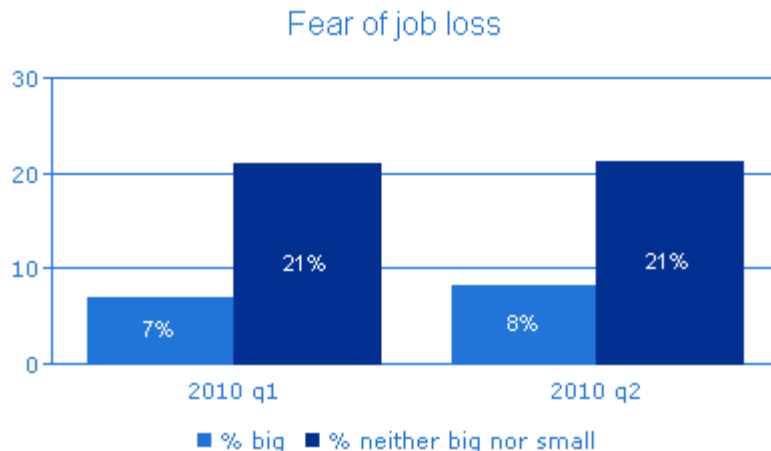
In general, employees have more trust in finding a different job elsewhere, than in finding a comparable job.

Within Europe, the Norwegian and Czech employees are the most optimistic about finding a new job within six months. Respectively 87% and 84% of the employees share this feeling.

Of all Asian employees, the Chinese employees have the most confidence in finding a different job, namely 87%. They also have more confidence in finding a comparable job than other Asian employees (92%).

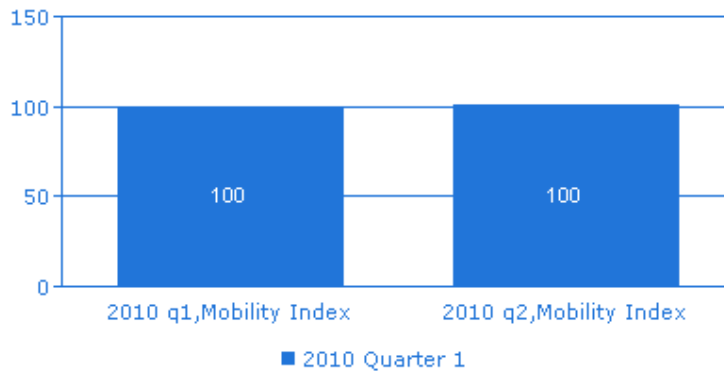
Employees from Australia, Canada and Mexico also have great confidence in finding a different job (82%, 82% and 86%).

In Norway, only few employees think there is a big chance that they will lose their job in the next six months (3%). Norway shares this lowest chance estimate with neighbor Sweden and with Canada.



# mobility increased in four countries

Mobility index



Changes	↑	↓
Belgium	5,1	
Italy	5,5	
Canada	9,7	
India	6,3	

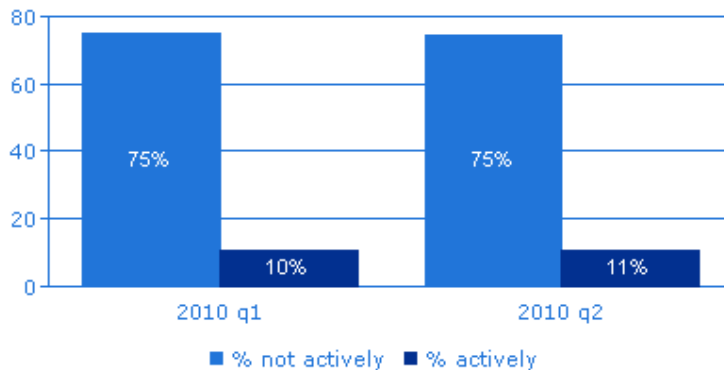
Question:

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

or

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

Looking for a new job

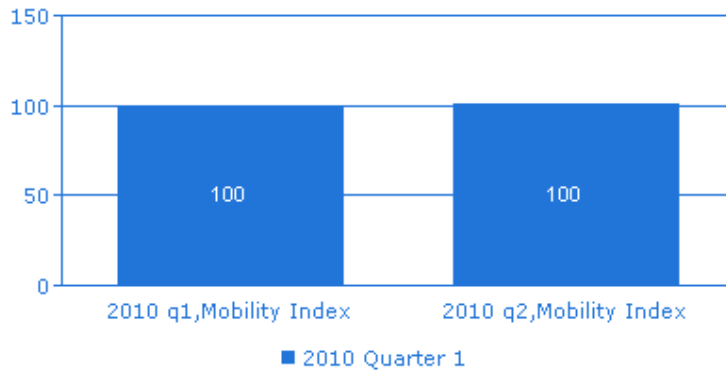


Question:

To what extent are you currently looking for another job?

# mobility increased in four countries; only in India the increase is a result of a higher chance that employees will lose their current job

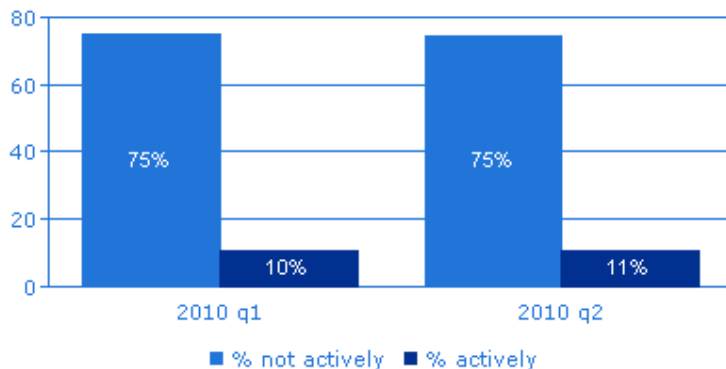
Mobility index



Employee Mobility worldwide is stable. Only in Belgium, Italy, Canada and India more people expect to change jobs within the next 6 months.

Especially young people expect to change jobs more often within six months. For employees aged 18-24, the mobility index in Canada was 92 in the first quarter of 2010 and increased to 125 in Q2. In Italy too, the mobility-index is much higher than three months ago for younger employees (from 83 to 108). In Belgium all younger than 44 have a higher expectation of their mobility. On the other side of the spectrum, Indian employees expect more often to change jobs, the strongest increase in India is among employees between 55 and 65 years old.

Looking for a new job



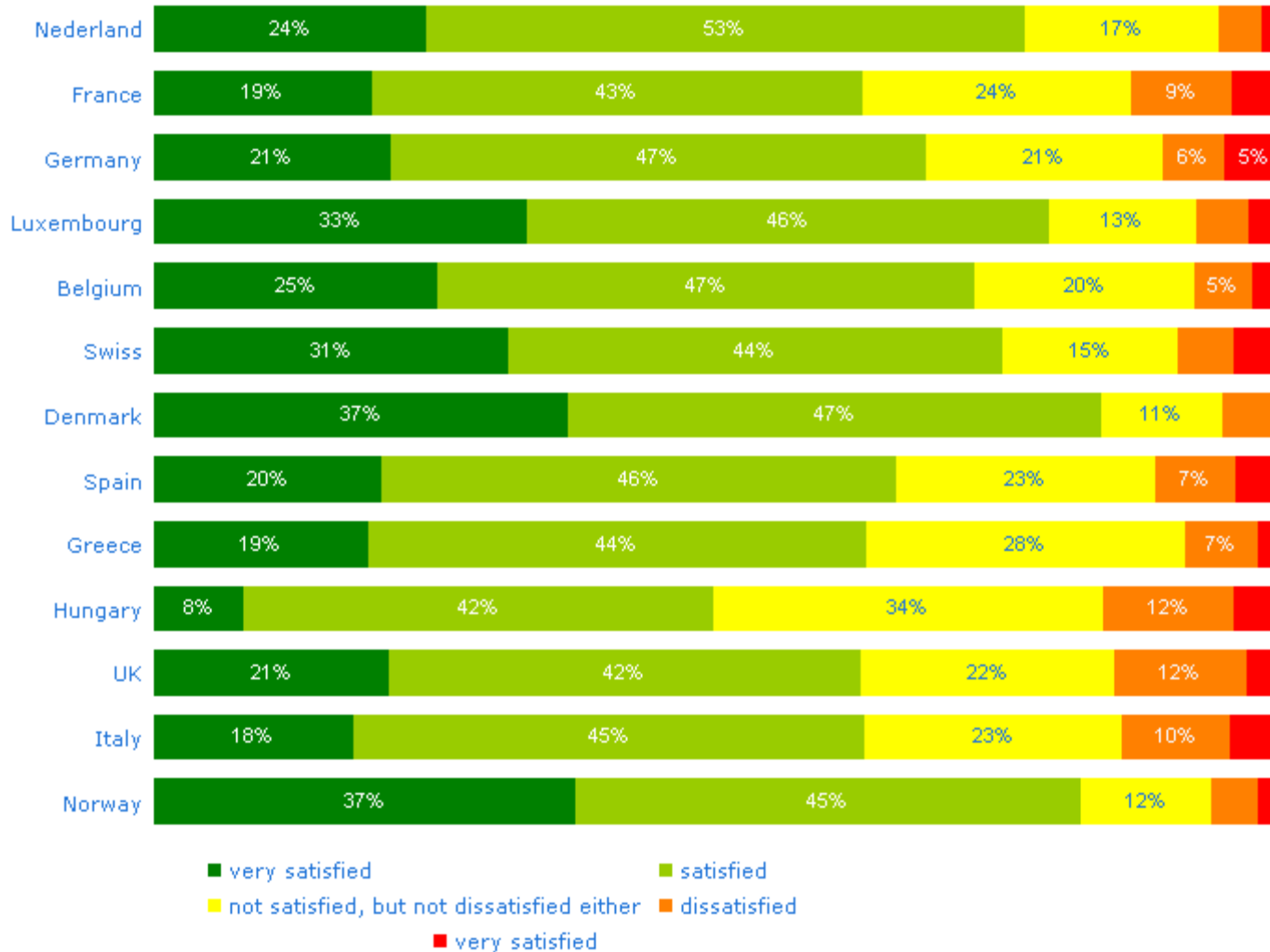
In India mobility is higher, probably because more people expect to lose their jobs within the next 6 months. Of all 25 countries India is the only country in which more people expect to change jobs, because they will lose their current job. Also, in the past six months, a much higher percentage of Indian employees changed jobs compared to employees in other countries.

# index

- chapter 1: workload and holiday
- chapter 2: mobility
- **chapter 3: satisfaction**
- chapter 4: personal motivation

# satisfaction (1)

Satisfaction



On average around 70% of employees are (very) satisfied to work at their current employer.

More than a third of the employees from Scandinavia are very satisfied with their employer, while only 8% of employees from Hungary are very satisfied.

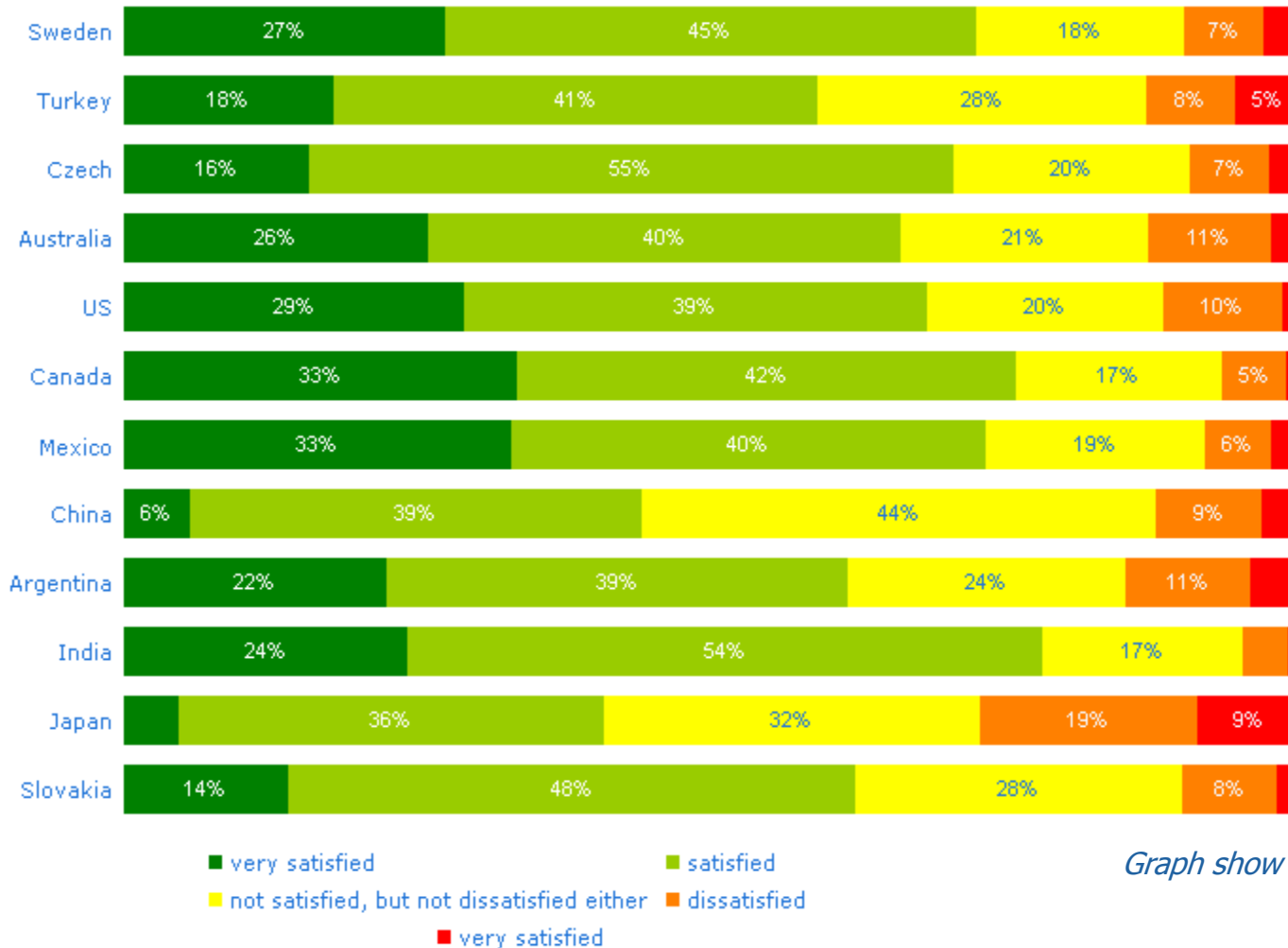
*Graph show results of Q1 and Q2*

Question:

How satisfied are you in general to work at with your current employer?

# satisfaction (2)

Satisfaction



Graph show results of Q1 and Q2

Employees from both China and Japan are not that satisfied with their employer, compared to employees in other countries.

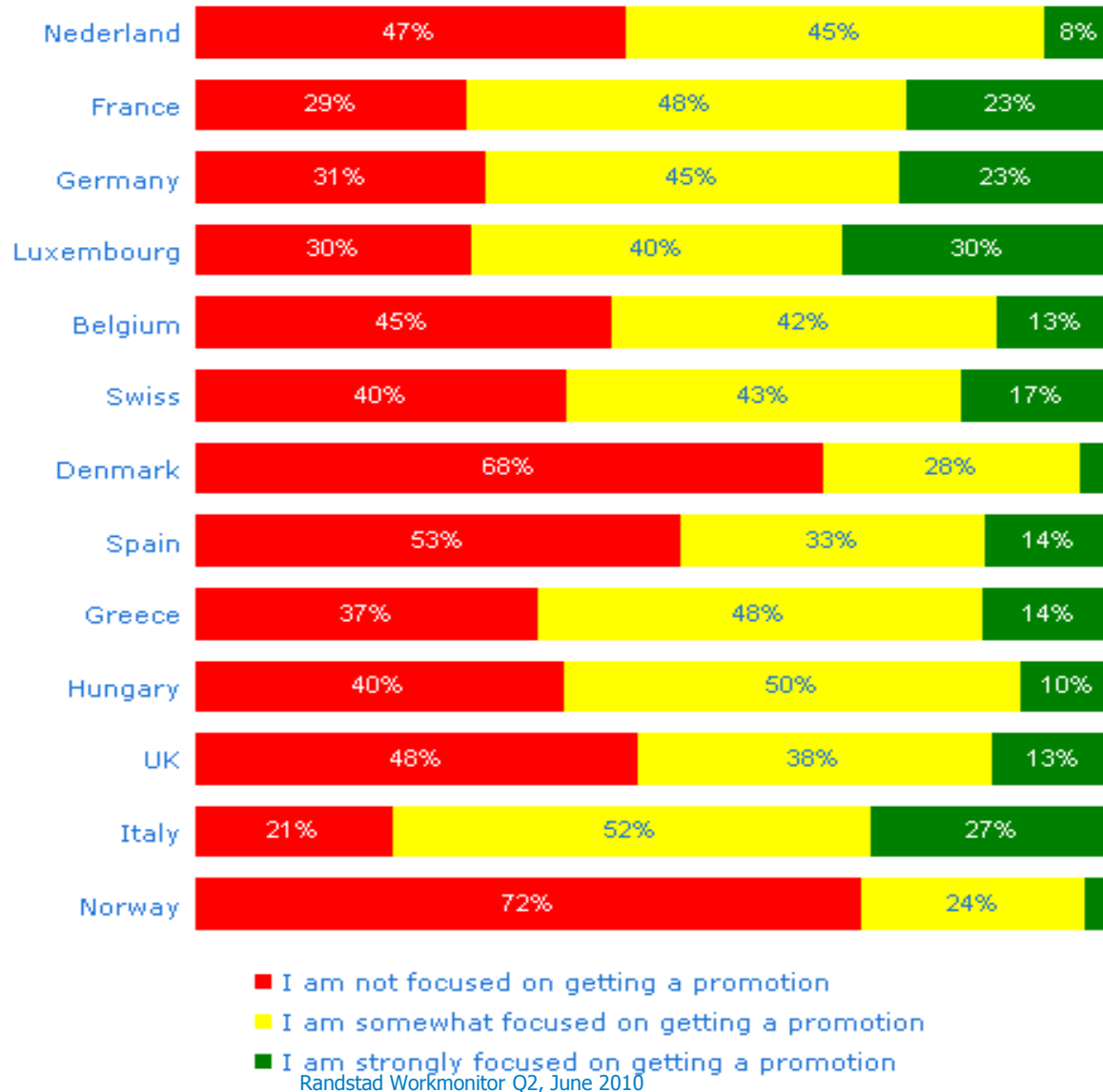
Hungarian, Czech and Slovakian employees are rarely very satisfied with their employer. Employees with a low income are generally less satisfied than people with higher incomes.

# index

- chapter 1: workload and holiday
- chapter 2: mobility
- chapter 3: satisfaction
- chapter 4: personal motivation

# personal motivation (1)

## Focus on promotion



Compared to most other countries, Italians are very much focused on getting a promotion (79%). Scandinavians the least.

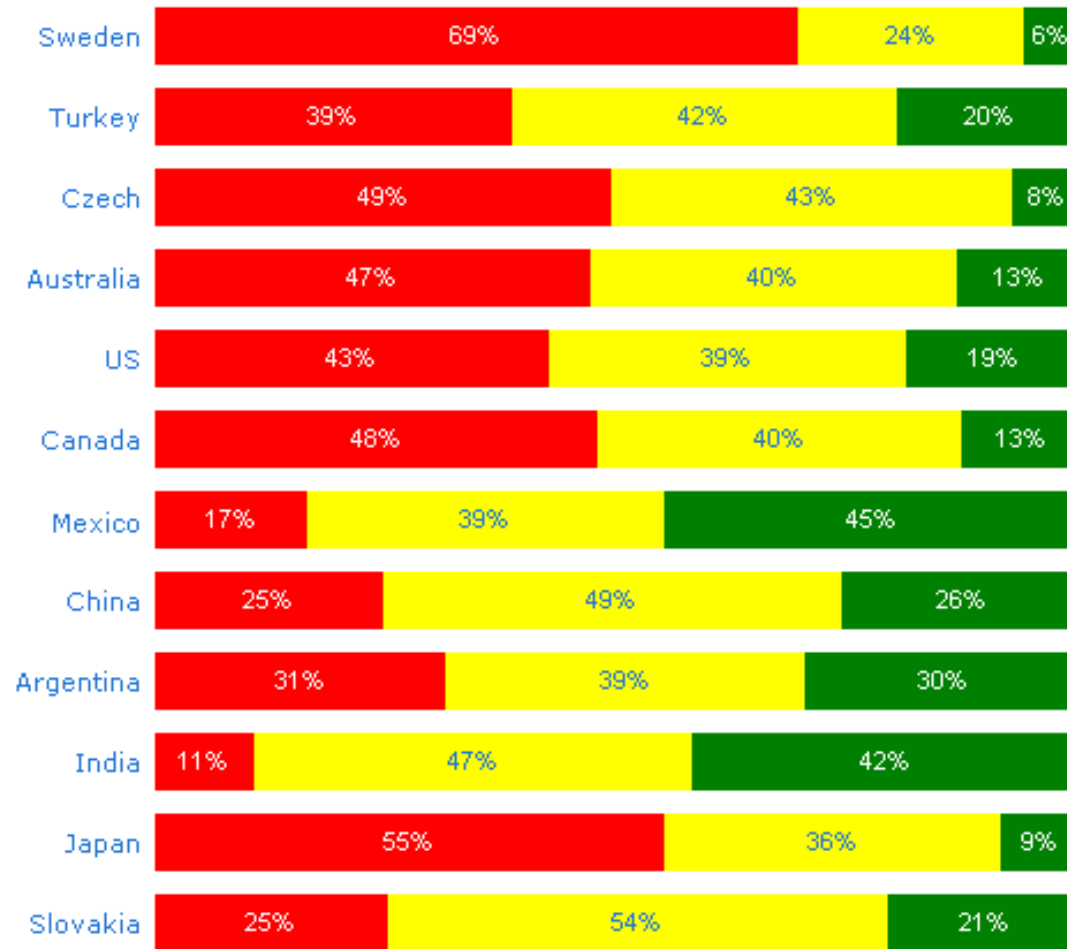
Graph show results of Q1 and Q2

Question:

To what extent are you focused on getting a promotion?

# personal motivation (2)

## Focus on promotion



India scores the highest (89%) in the focus on getting a promotion, closely followed by Mexico (84%) and Slovakia (75%).

Graph show results of Q1 and Q2

Question:

To what extent are you focused on getting a 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

# more information

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