

# Randstad Workmonitor Global results wave 4, 2010

Randstad Holding NV

December 2010



# Background Randstad Workmonitor (1)

- After successfully introducing the Workmonitor in the Netherlands in 2003 and more recently in Germany, the survey now covers 27 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, also 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). The minimum sample size is 400 interviews per country. The panel of Survey Sampling International (SSI) is used for sampling purposes. The fourth wave was conducted November 3<sup>rd</sup> until 17<sup>th</sup>, 2010 in the following countries:

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

# Wave 4 summary (1) – Primary employment conditions and benefits

## **Base salaries were primarily raised with an inflation correction or the normal periodical increase**

- The financial crisis seems to have passed its peak: the majority of the employees in all countries says the company/organization they work for is doing well. Chinese, Indian and Swiss employees are most positive about the current economic situation. In Denmark and Japan employees are less positive about the economic situation. Also, most employees think the economic situation of their employer will (further) develop positively in 2011.
- Maybe because of the financial crisis, only in a few countries a majority of employees have seen an improvement in their primary employment conditions and benefits. Last year, it was more common to have their base salary corrected for inflation or to receive a normal periodical pay raise. In many countries the expectation of receiving a financial bonus at year-end is low. Many employees do feel though they're entitled to an extra (financial) reward considering their performance in the past year.

# Wave 4 summary (2) – Primary employment conditions and benefits

## **Employees expect more improvements in the upcoming year**

- The optimism about the financial future of employers is translated into (higher) expectations regarding the upcoming year. Especially employees in Argentina and Mexico have high expectations for 2011. They most expect a pay raise and an improvement of their primary employment conditions and benefits.

## **Better work-life balance a priority for many employees**

- Besides financial improvements employees are keen on improving their work-life balance in 2011. In many countries employees make New Year's resolutions regarding their job. All over the world employees indicate they want to achieve a better work-life balance next year. In Argentina, Mexico, China and India employees are most keen on being promoted next year.

# Wave 4 summary (3) – mobility, satisfaction & personal motivation

## **Market stabilizes**

- The labour market seems to stabilize. Three months ago employees were more confident about their possibilities to find a new job in six months than in the previous wave. This level of confidence is now the same in most countries as it was three months ago. Also, there are no major changes in the number of employees looking for a different job, employees who fear job loss or the level of satisfaction with their current job. Also, the number of employees that focus on getting promoted is the same as three months ago.
- Only the mobility index increased. The mobility index keeps improving (little by little) since the beginning of 2010. Given these results, the tumultuous period following the financial crisis, seems to be over.

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

## **Highest mobility in Asian countries**

- The first countries to benefit from these better times seem to be Asian countries, like India and China. The mobility index of China and India are the highest of all countries and Indian employees are also the most positive about their chance of finding a new job.

## **Mobility not because of a lower level of job satisfaction**

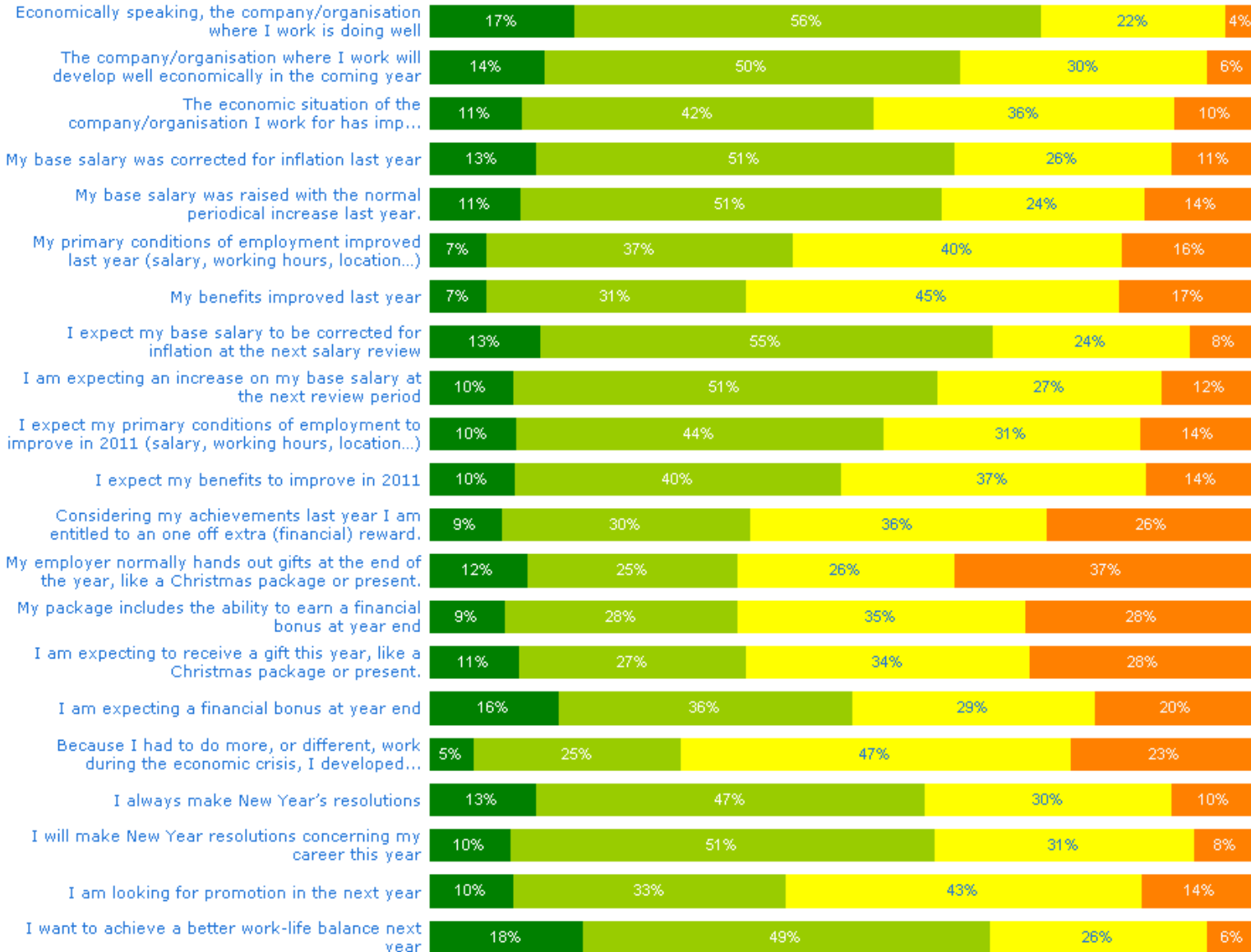
- The increase in mobility does not seem to be because employees are less satisfied with their current job. Employees in Turkey are more often satisfied with their current employer, in all other countries the job satisfaction level remained the same.
- Very satisfied employees are mostly older (55-64 years), employees with a lower education level and people who work for the government or non profit organizations.

# Index

- chapter 1: primary employment conditions and benefits
- chapter 2: mobility
- chapter 3: satisfaction
- chapter 4: personal motivation

# Belgium

## Press statements



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

- 73% of the Belgium employees indicate that the company/organization they work for is doing well.

- About two third of the Belgium employees state that their base salary was raised with the normal periodical increase last year (62%) and was corrected for inflation (64%).

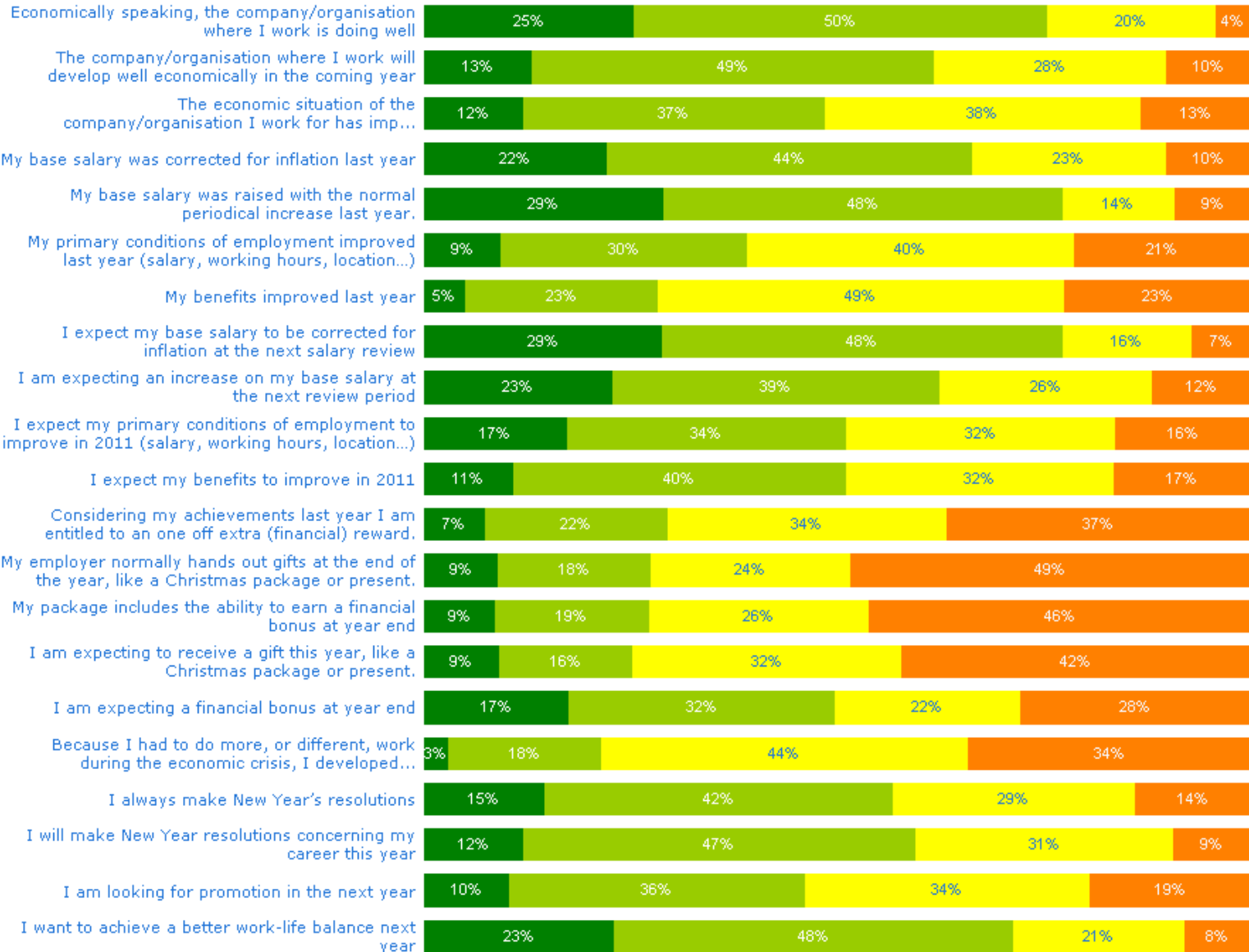
- Approximately seven out of ten employees (68%) expect their base salary also to be corrected for inflation at the next salary review.

- Over half of the Belgium employees expect their primary employment conditions to improve in 2011 (54%).

- 67% of the Belgium employees strive for a better work-life balance next year. For most of them this is a job related New Year's resolution (61%).

# Luxembourg

## Press statements



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

• Just like their Belgium colleagues, 75% of the employees in Luxembourg say that the company/organization they work for is doing well.

• The base salary of approximately eight out of ten employees (77%) was raised with the normal periodical increase last year.

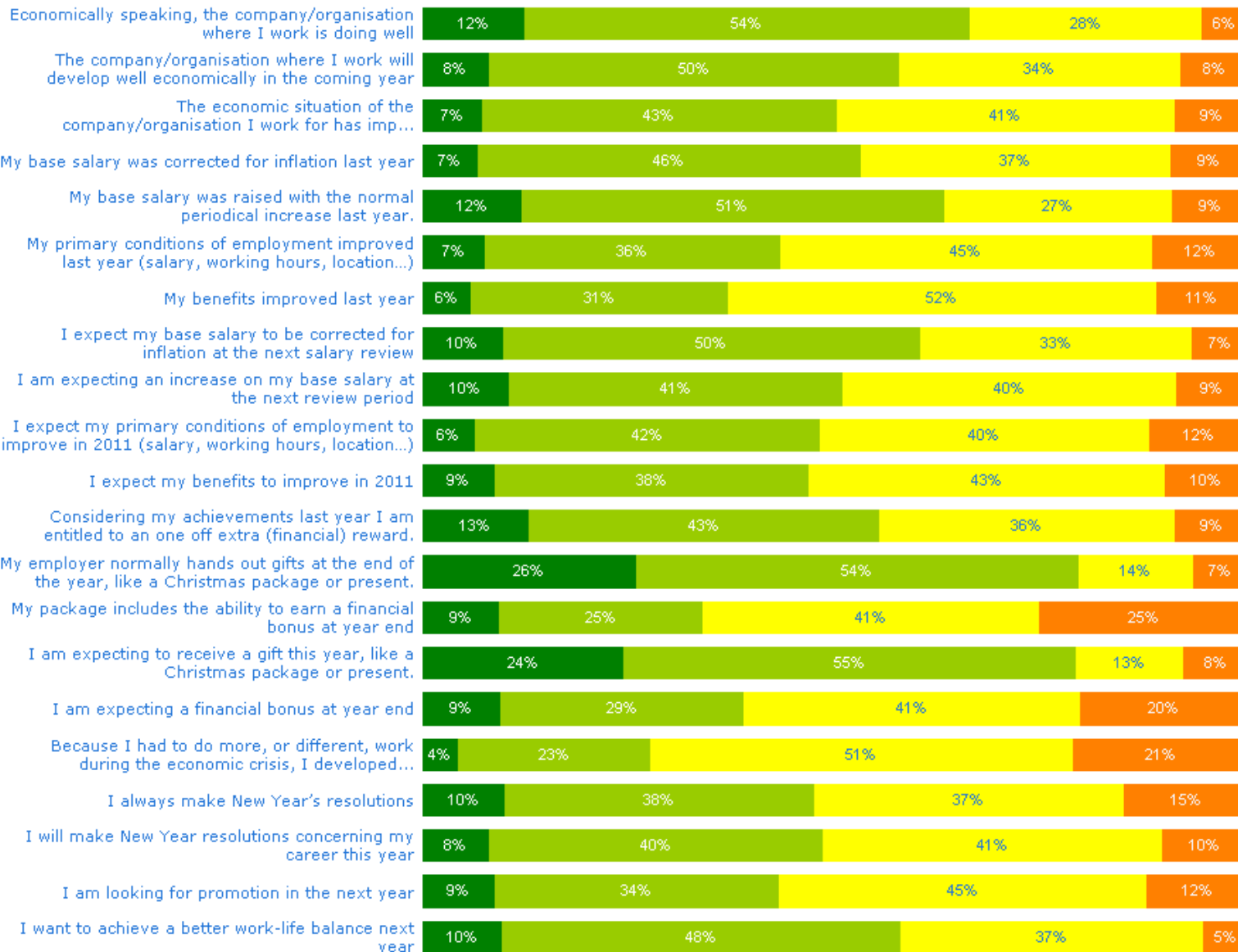
• Also, about 77% of the employees expect their base salary to be corrected for inflation at the next salary review.

• Three out of ten employees feel they are entitled to an extra (financial) reward because of their performance last year (29%).

• Seven out of ten employees (71%) want to reach a better work-life balance next year.

# Netherlands

## Press statements



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

- 66% of the Dutch employees state that the company/organization they work for is doing well.

- More than six out of ten Dutch employees (63%) state that their salary was raised with the normal periodical increase last year. For 53% of the Dutch employees their base salary was corrected for inflation last year.

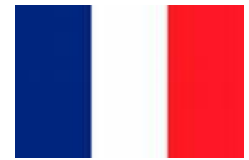
- 60% expect their salary to be corrected for inflation at the next salary review.

- In comparison to Belgium and Luxembourg, more Dutch employees feel they are entitled to an extra reward considering their achievements last year (56%).

- In the Netherlands it is more common that an employer hands out gifts at the end of the year, like a special Christmas present or gift than in Belgium and Luxembourg (80% versus 37% and 27%).

# France

## Press statements



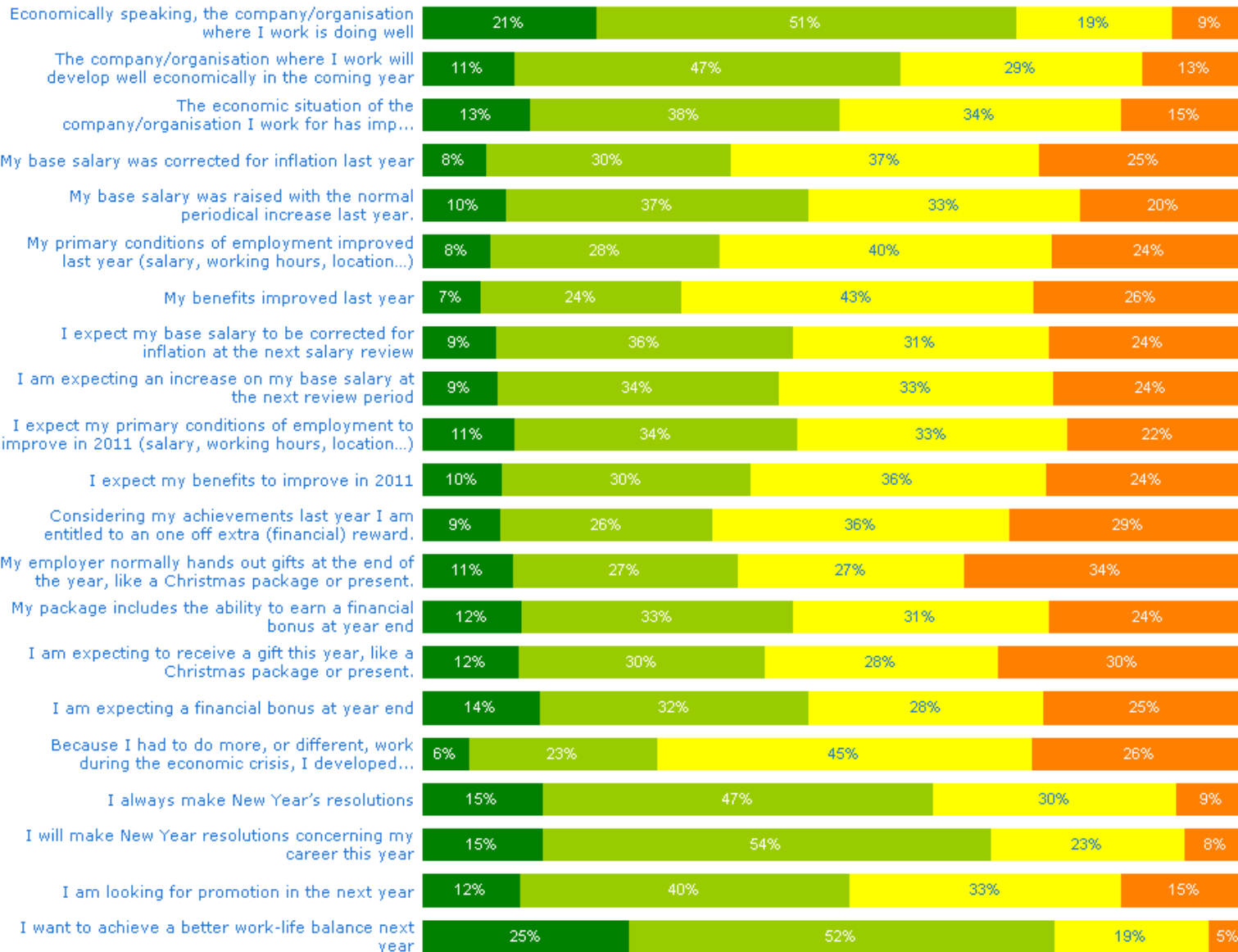
• More than half of the French employees (58%) are confident about the future. They state that the company/organization they work for will do well economically in the coming year.

• For 47% of the French employees their salary was raised with the normal periodical increase last year. The majority of French employees haven't had an improvement in primary employment conditions or benefits and don't expect it.

• 54% of the French employees don't expect a financial bonus at the end of the year.

• Also, less than half of the French employees expect their primary employment conditions to improve in 2011 (45%).

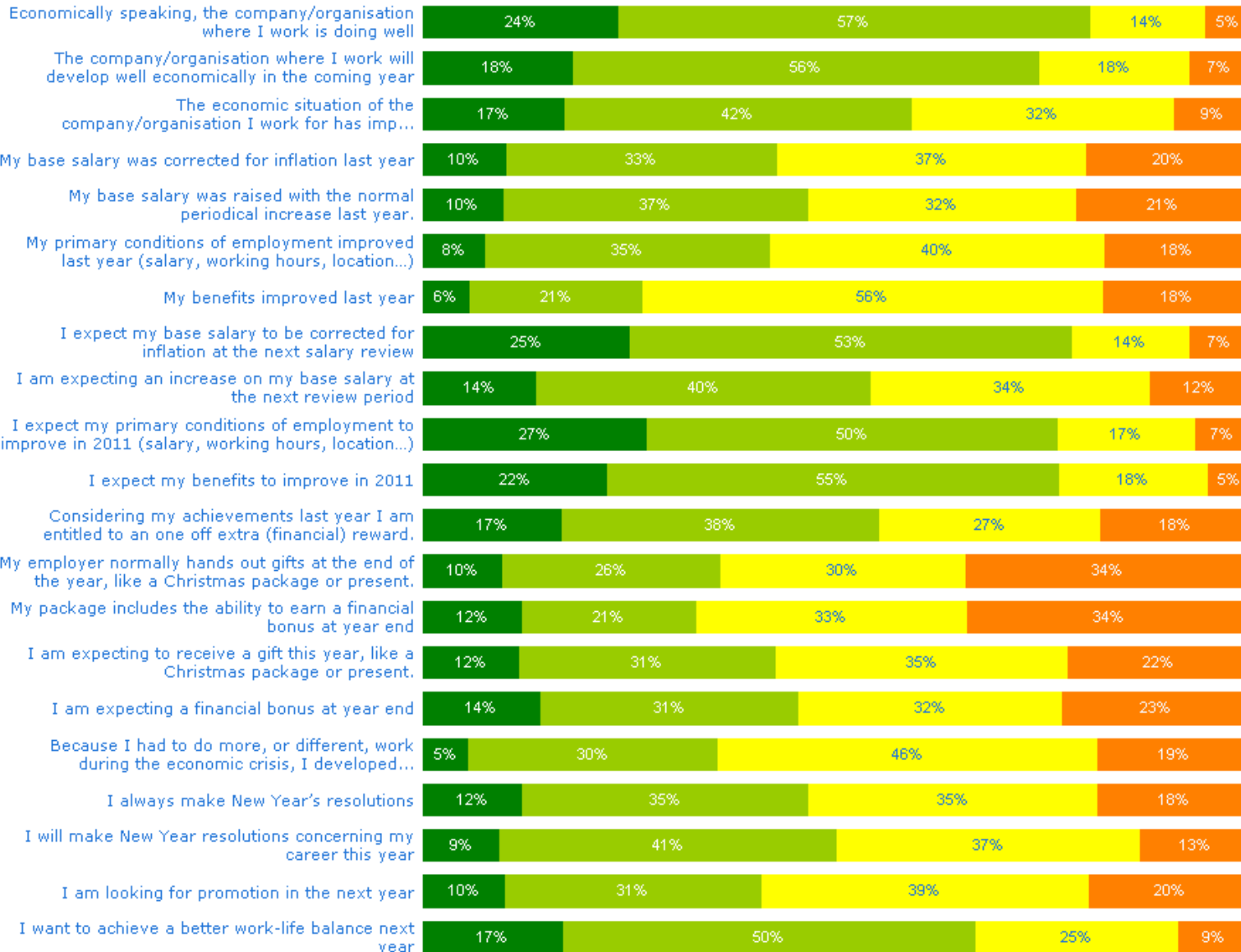
• 77% of the French employees want to reach a better work-life balance next year. This is reflected by the amount of employees who will make New Year's resolutions regarding their career this year.



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

# Germany

## Press statements



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

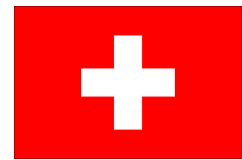
- More than seven out of ten German employees (74%) state that the company/organization they work for will develop economically in the coming year.

- Less German employees state that their benefits improved last year in comparison to France and Swiss (27%).

- But nearly eight out of ten German employees (77%) expect their primary employment conditions and benefits to improve in 2011.

- For this year most German employees don't expect to receive a gift, like a Christmas package or present (57%) or a financial bonus at the year-end (55%).

## Press statements



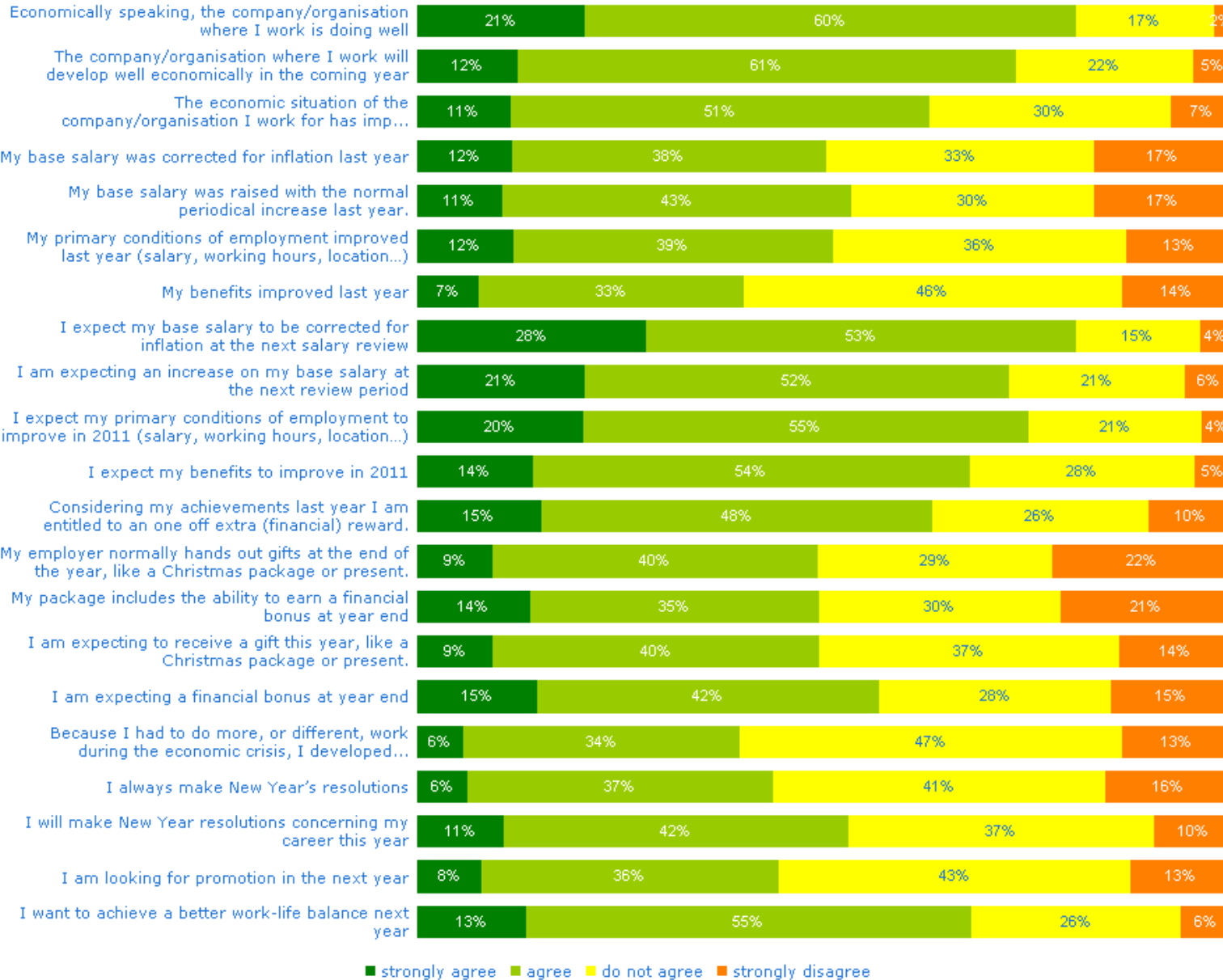
• A prominent 81% of the Swiss employees indicate that the company/organization they work for is doing well.

• More than in France and Germany, Swiss employees state that their primary employment conditions improved last year (51%) and 40% of the employees state that their benefits improved during this period of time.

• In addition, 75% of the Swiss employees expect their primary employment conditions to improve in 2011. Also, 68% of the employees expect their benefits to improve in 2011.

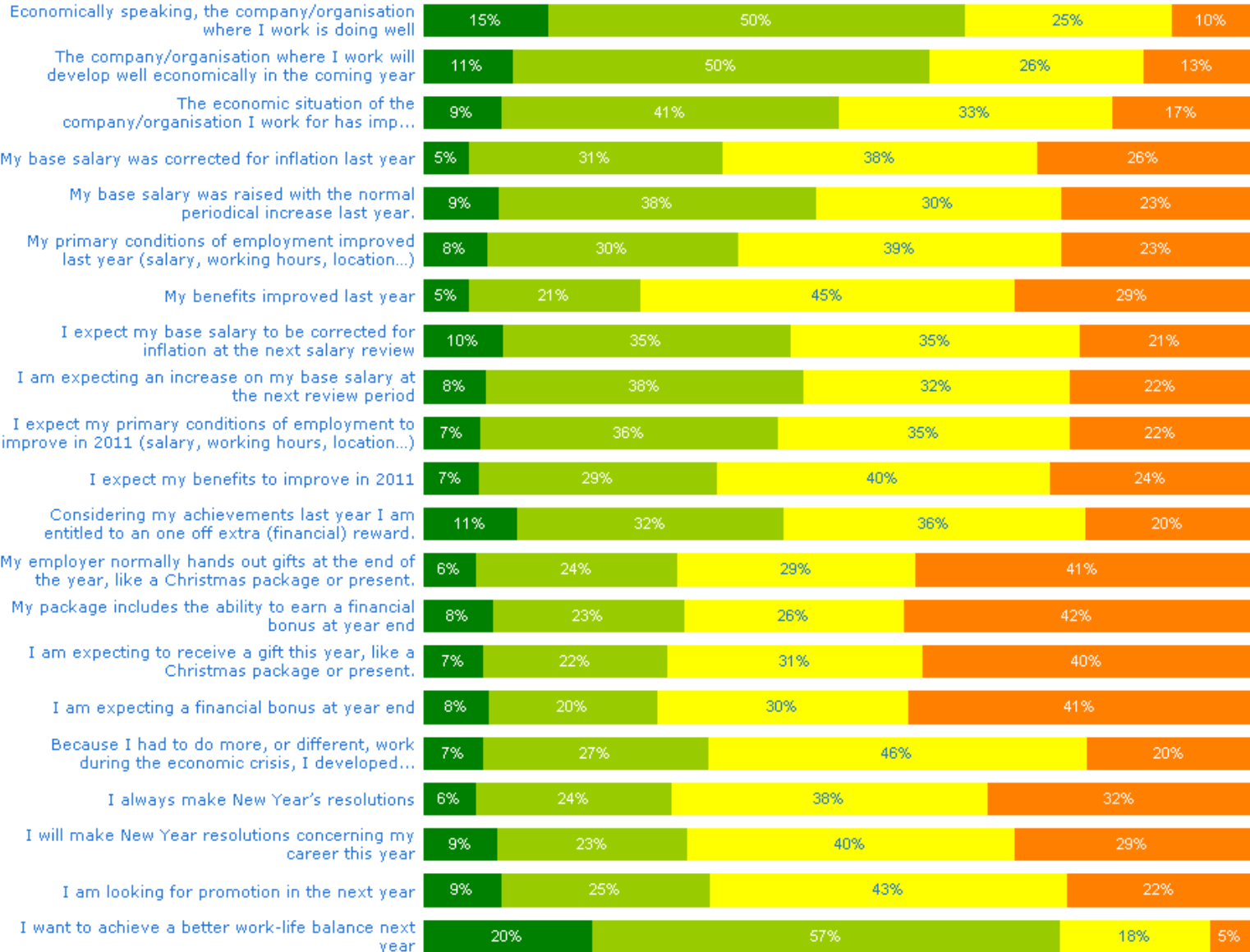
• The share of Swiss employees that feel that they are entitled to an extra reward considering their performance last year, is larger than the share of employees in France and Germany that feel like that.

• 57% of the Swiss employees is expecting a financial bonus at the end of the year.





Press statements



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

- 61% of the British employees indicate that the company/organization they work for will develop well economically in the coming year.

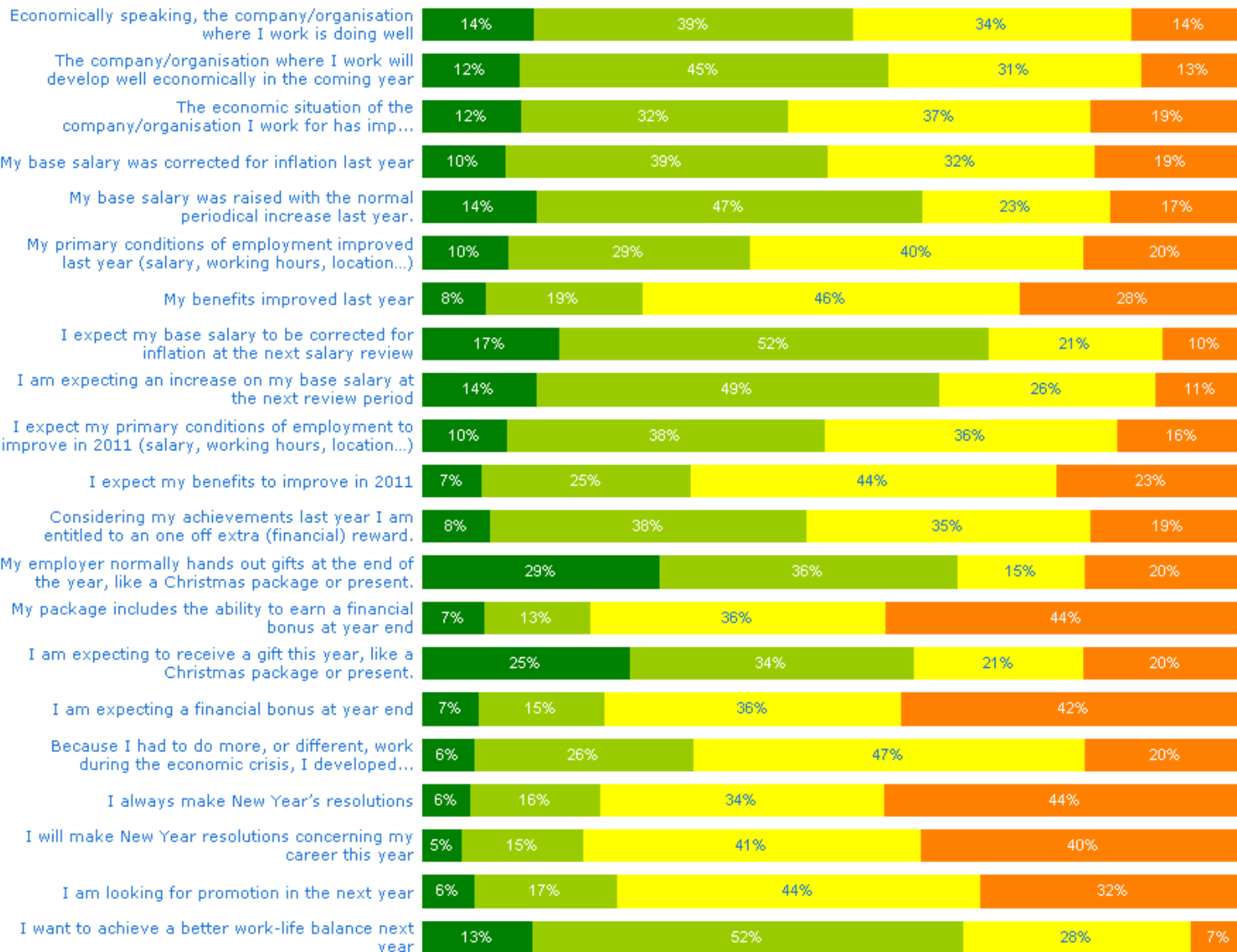
- No more than 26% of the British employees state that their benefits improved last year. Also, few employees think that their benefits will improve in 2011.

- 46% of the British employees do expect a pay raise at the next review period.

- Approximately three out of ten British employees (29%) expect to receive a gift at the end of this year. The same amount of employees (28%) expect a financial bonus at the end of the year.

# Denmark

## Press statements



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

- More than half of the Danish employees (57%) state that the company/organization they work for will develop well economically in the coming year.

- In Denmark a smaller share of employees say that their benefits improved last year (26%) than in Norway and Sweden. For 61% of the Danish employees their salary was raised with the normal periodical increase.

- Most Danish employees (69%) also expect their salary to be corrected for inflation at the next salary review.

- It seems common for employees in Scandinavian countries (Denmark, Norway, Sweden) that an employer hands out gifts at the end of the year.

- 65% of the Danish employees want to reach a better work-life balance next year.

# Norway

## Press statements

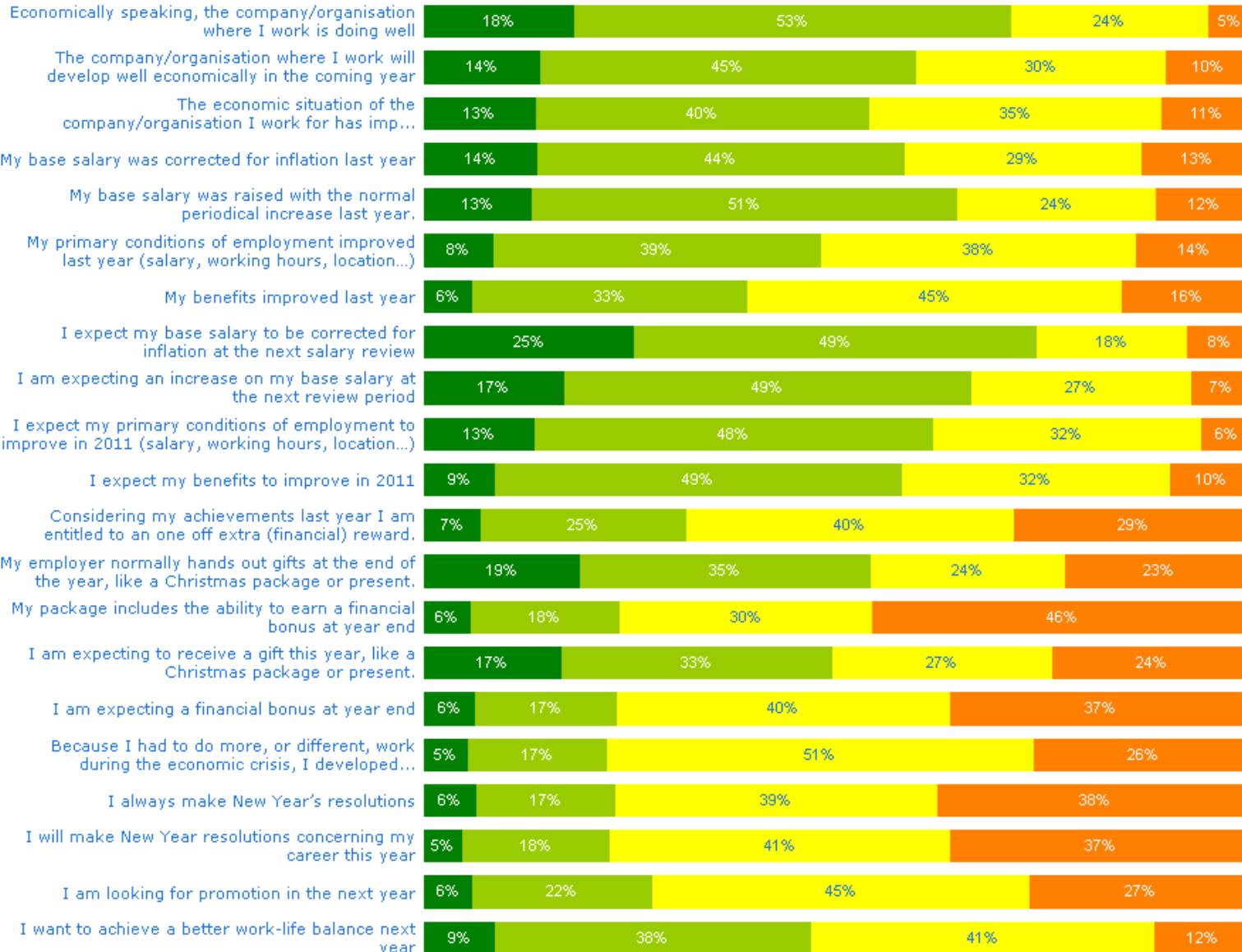


• 71% of the Norwegian employees indicate that the company/ organization they work for is doing well.

• For 47% of the Norwegian employees their primary employment conditions improved last year and 39% of the employees say that their benefits improved during this period of time.

• 63% of the Norwegian employees expect their primary employment conditions to improve in 2011.

• In comparison to other countries a relatively small number of Norwegian employees (47%) want to reach a better work-life balance next year.

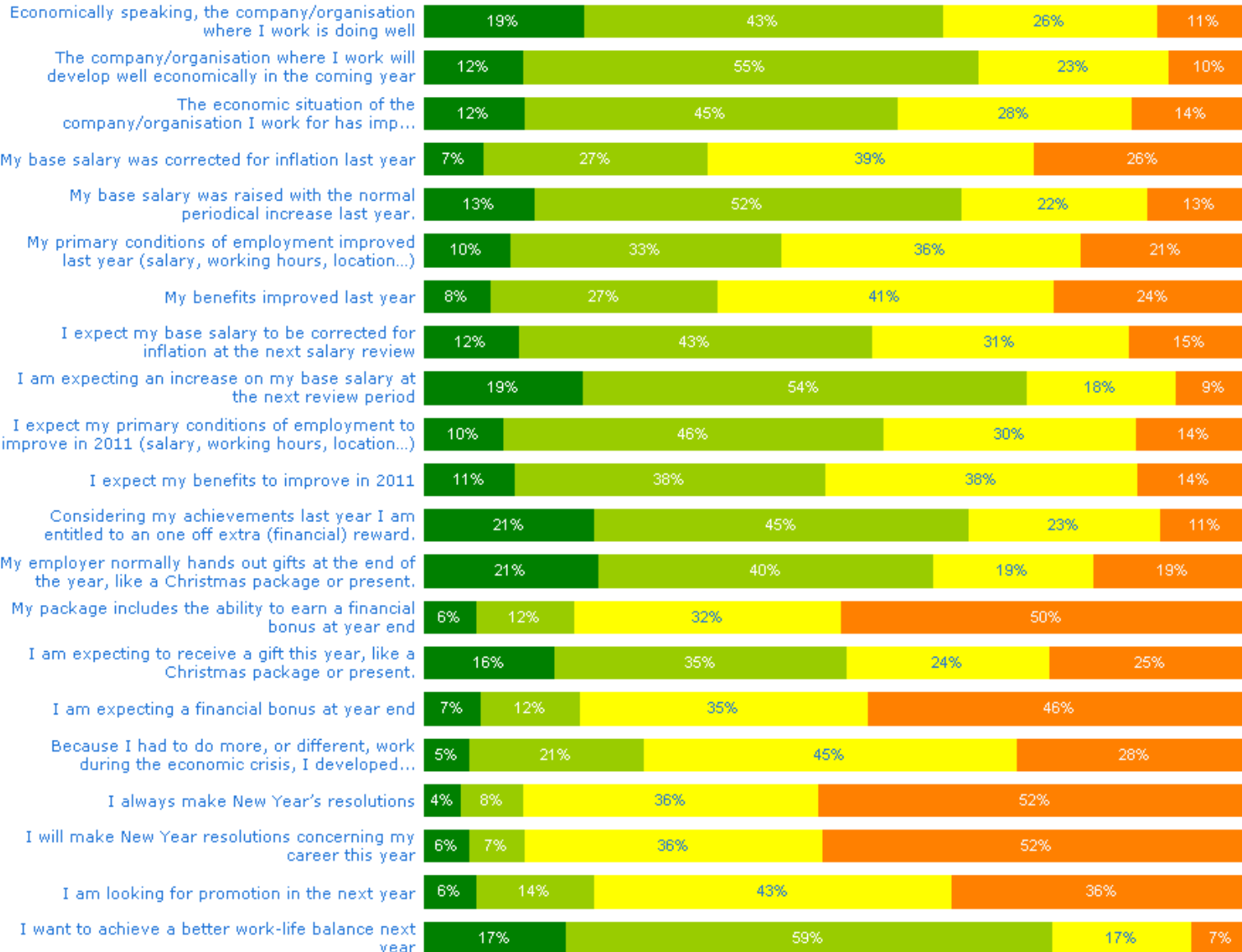


■ strongly agree ■ agree ■ do not agree ■ strongly disagree

# Sweden



## Press statements



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

- In Sweden a larger share of employees believes that the company/organization they work for will develop well economically in the coming year (67%) than in Denmark and Norway.

- Two third of the Swedish employees state that their base salary was raised with the normal periodical increase last year (65%). One third also had an improvement in their benefits (35%).

- 56% of the Swedish employees expect their primary employment conditions to improve in 2011.

- In comparison to Denmark and Norway, a larger share of Swedish employees feel that they are entitled to an extra reward considering their achievements last year.

# Czech Republic

## Press statements

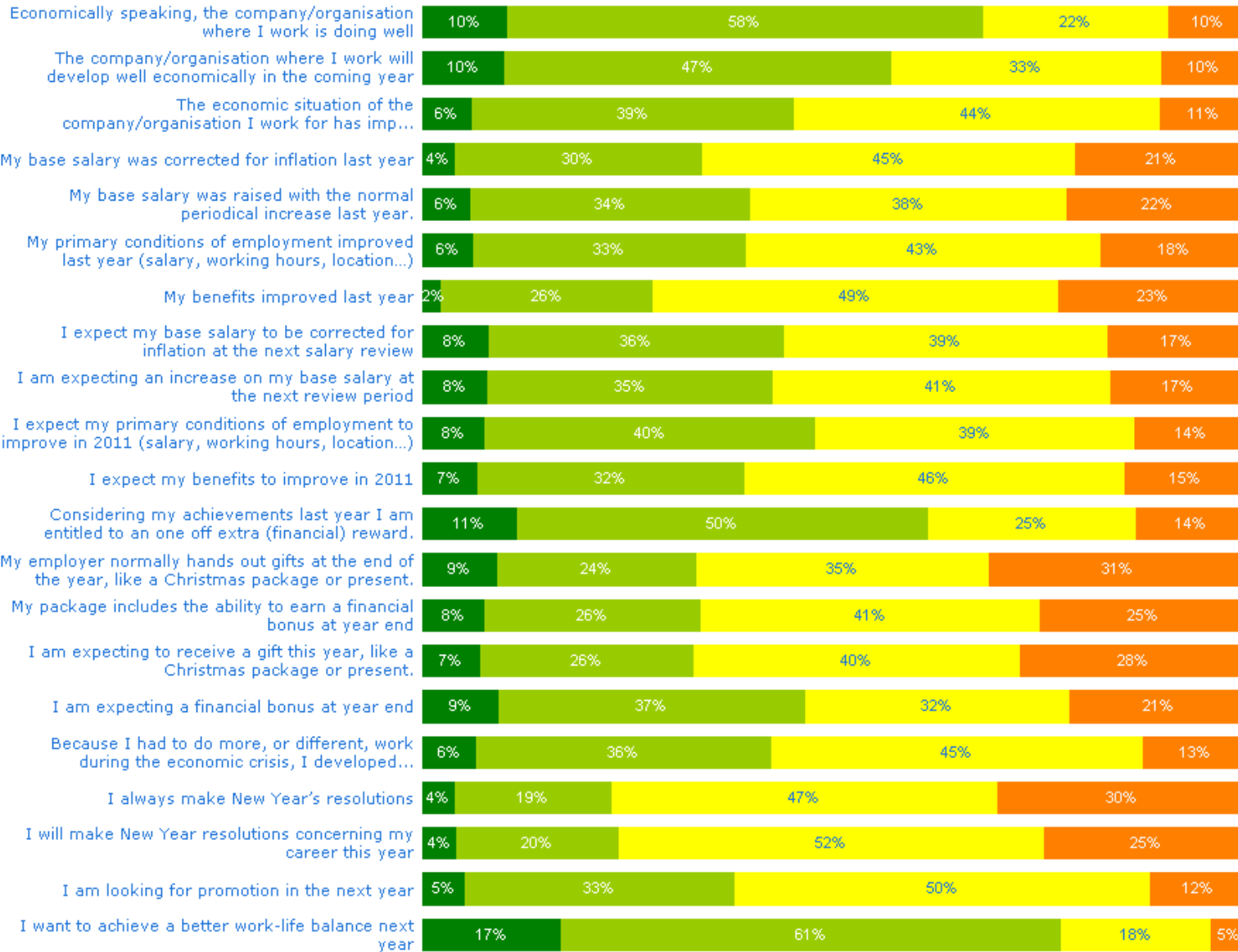


• According to 56% of the Czech employees the company/organization they work for is doing well.

• For 39% of the Czech employees their primary employment conditions improved last year and 28% of the employees state that their benefits improved during this period of time.

• A larger amount of the Czech employees expect their primary employment conditions to improve in 2011 (48%). But this share is less than in Poland, Hungary and Slovakia.

• 46% of the Czech employees do expect a financial bonus at the end of the year.

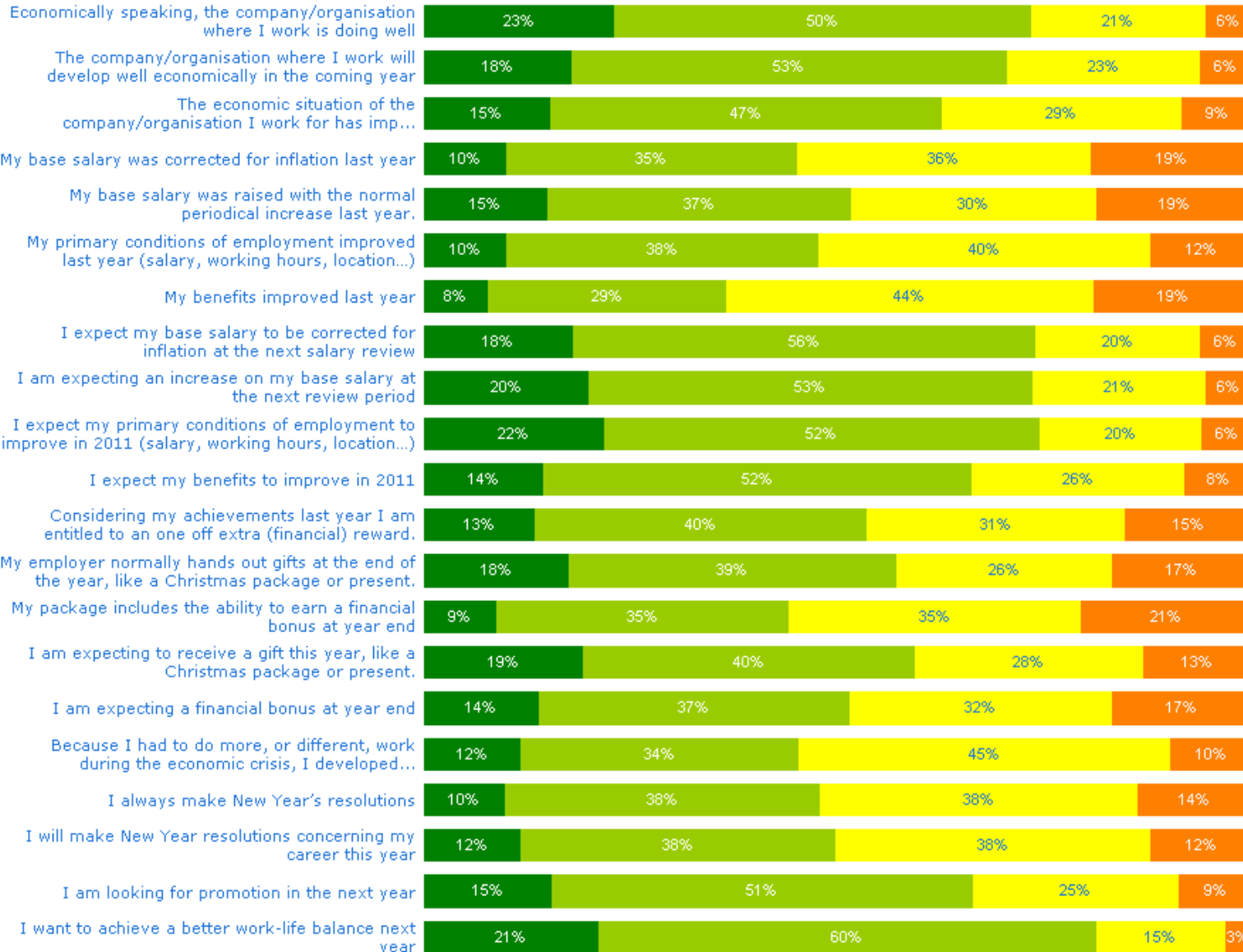


■ strongly agree ■ agree ■ do not agree ■ strongly disagree

# Poland



## Press statements



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

- In comparison to employees in Czech Republic, Hungary and Slovakia, Polish employees state more often the company/organization they work for is doing well (73%).

- 48% of the Polish employees state that their primary employment conditions improved last year and 37% of the employees state that their benefits improved during this period of time.

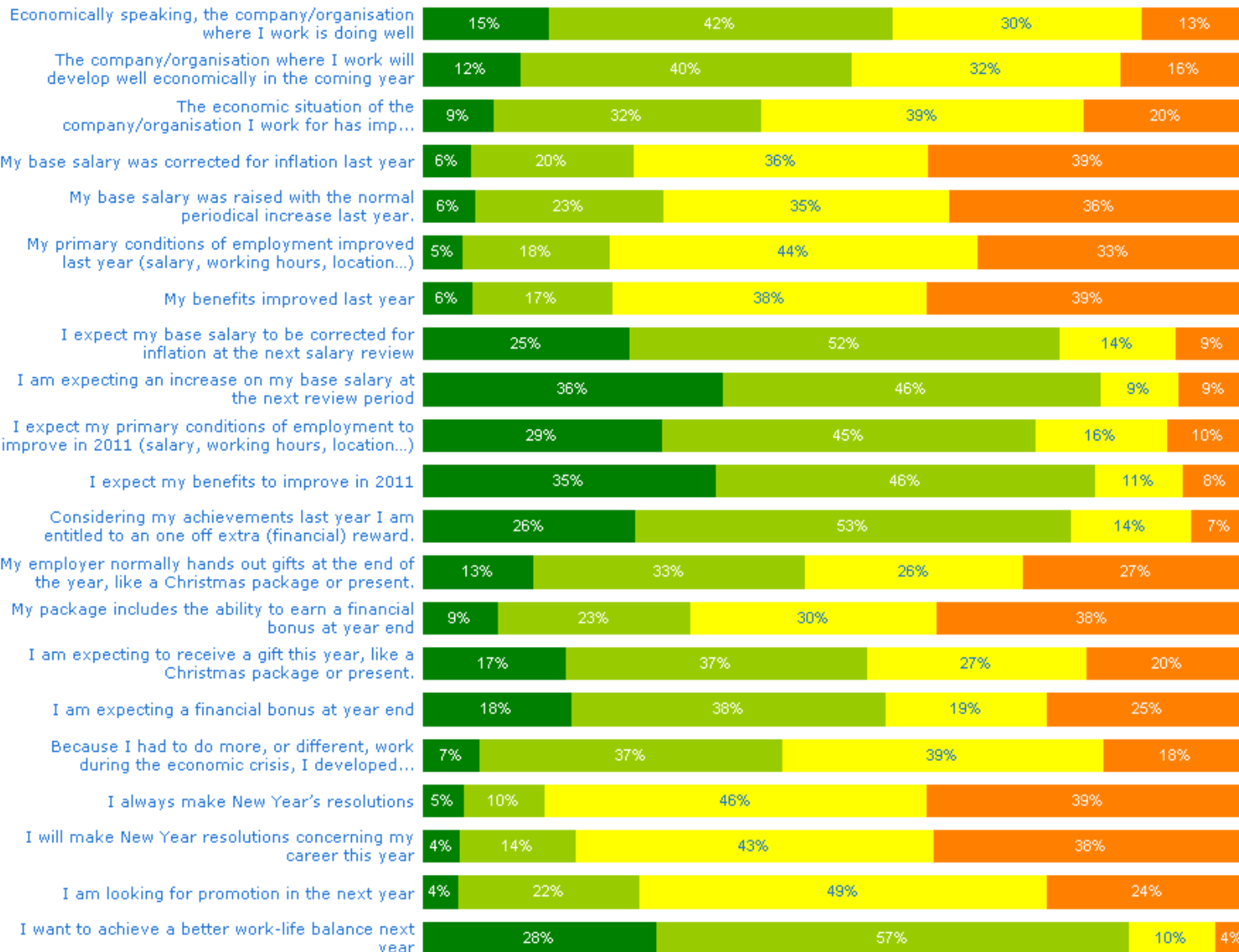
- In addition, 74% of the Polish employees expect their primary employment conditions to improve in 2011 and 66% of the employees expect that their benefits improve next year.

- 59% of the Polish employees are expecting to receive a gift from their employer this year.

- A prominent 81% of the Polish employees want to reach a better work-life balance next year.

# Hungary

## Press statements



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

- Only 23% of the Hungarian employees state that their primary employment conditions and their benefits improved last year.

- But approximately eight out of ten Hungarian employees (81%) expect their benefits to improve next year.

- Also, more than half of the Hungarian employees expect a financial bonus at the end of the year (56%).

- Of the Hungarian employees, a striking 85% want to reach a better work-life balance next year.

## Press statements



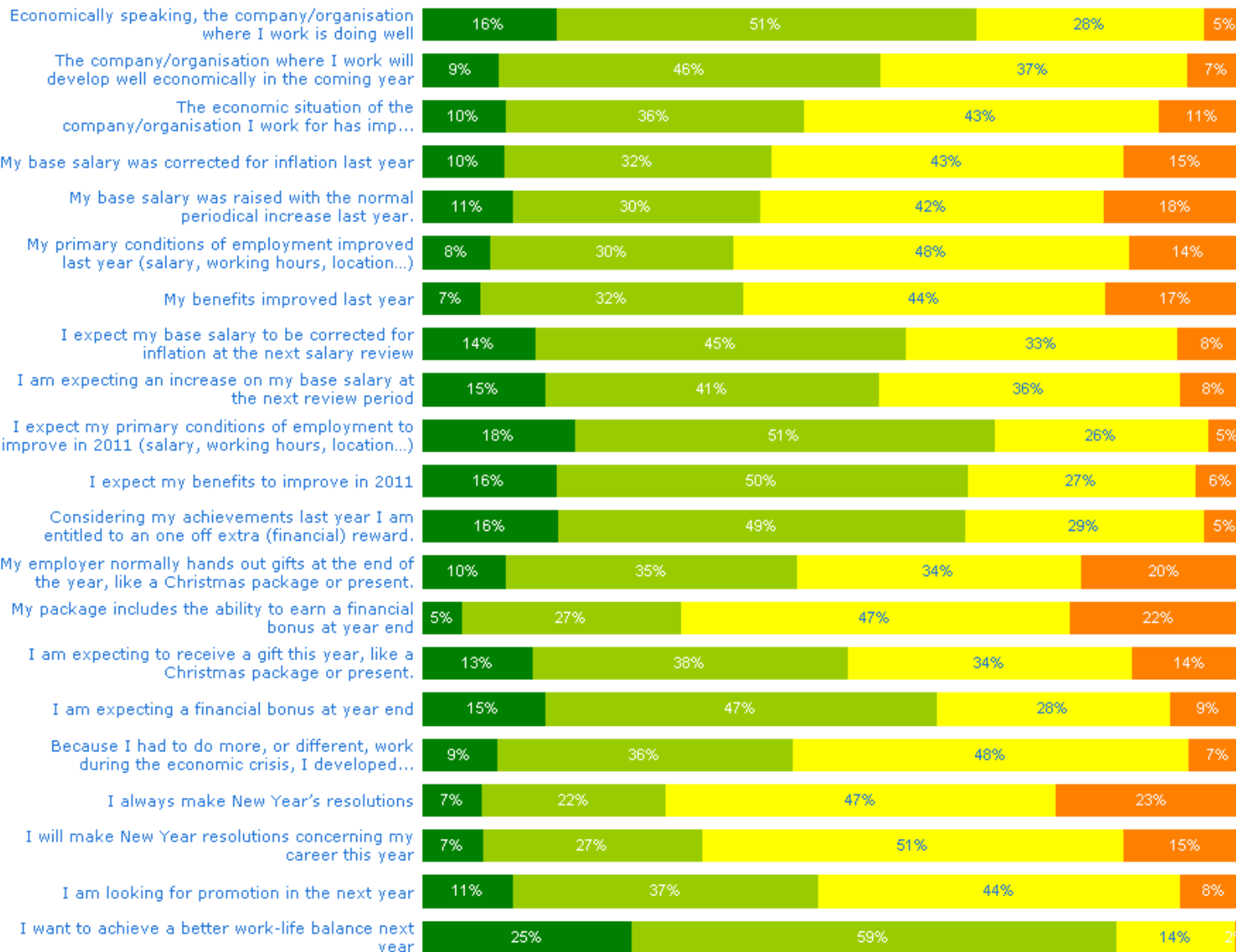
• The Slovakian employees state that the company/organization they work for will develop well economically the coming year (55%).

• The salary of approximately four out of ten of the Slovakian employees was raised with the normal periodical increase last year (41%). Their primary employment conditions (38%) and benefits (39%) also improved during this period of time.

• For the upcoming year almost seven out of ten Slovakian employees (69%) expect their primary conditions of work to improve.

• 65% of the Slovakian employees expect a financial bonus at the end of this year.

• In comparison to Poland and Hungary, Slovakian employees feel that they are entitled to an extra reward the most, considering their performance last year.

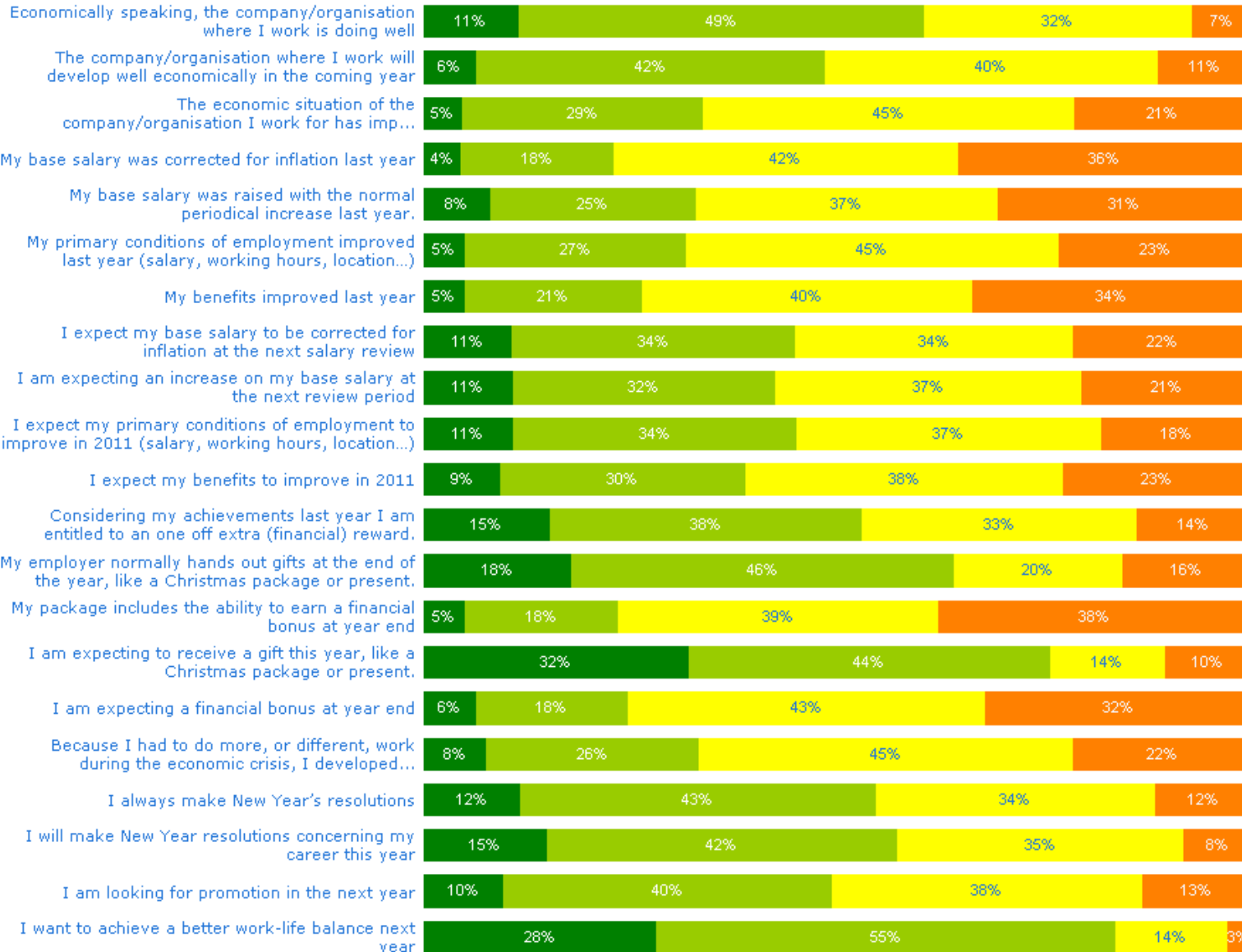


■ strongly agree ■ agree ■ do not agree ■ strongly disagree

# Greece



## Press statements



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

- Six out of ten Greek employees indicate that the company/ organization they work for is doing well.

- The salary of one third of the Greek employees (33%) was raised with the normal periodical increase last year. This share is less than in Italy, Spain and Turkey.

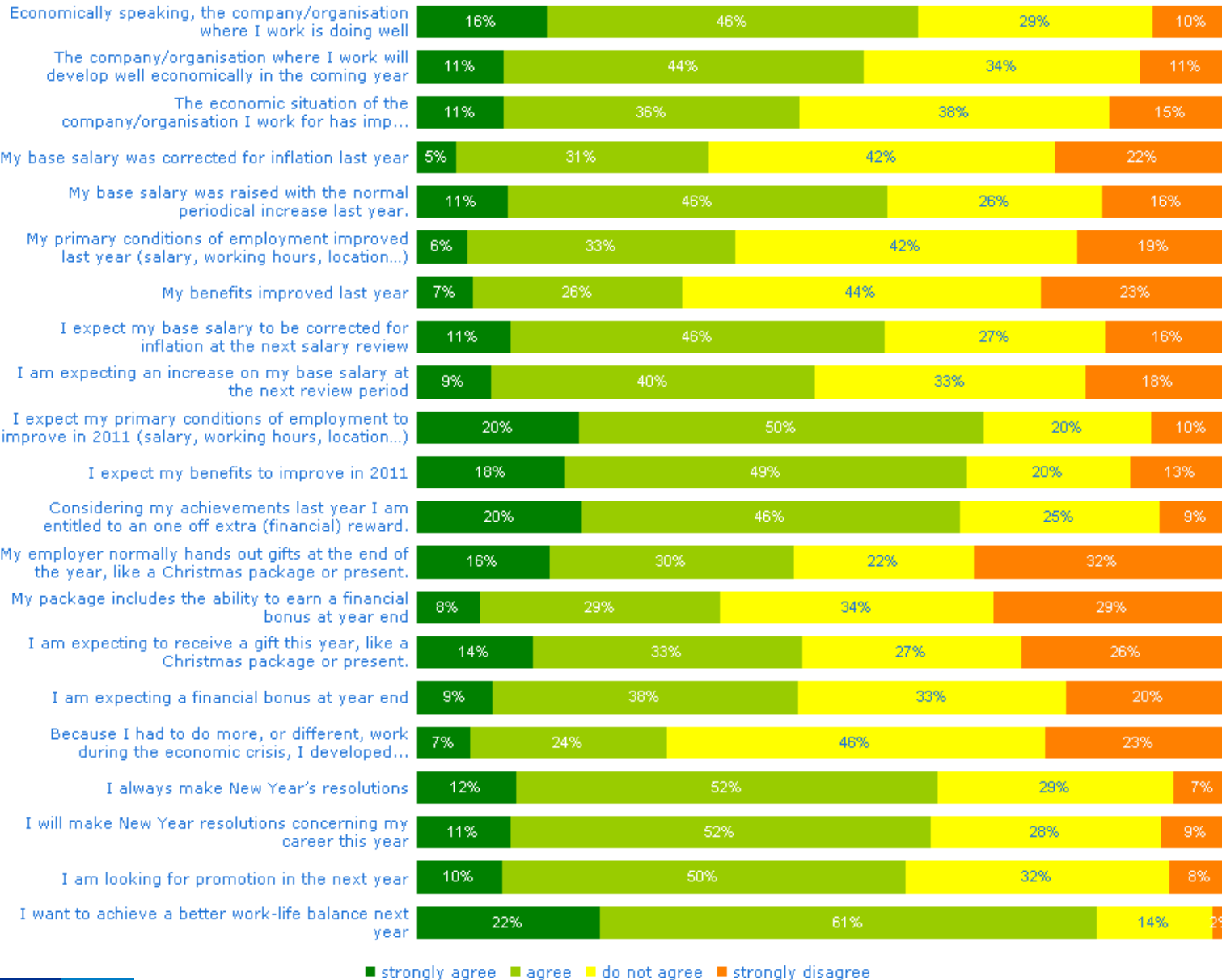
- 45% of the Greek employees expect their primary employment conditions to improve the next year.

- Most of the Greek employees (76%) are expecting to receive a gift this year, like a Christmas package or present.

## Press statements

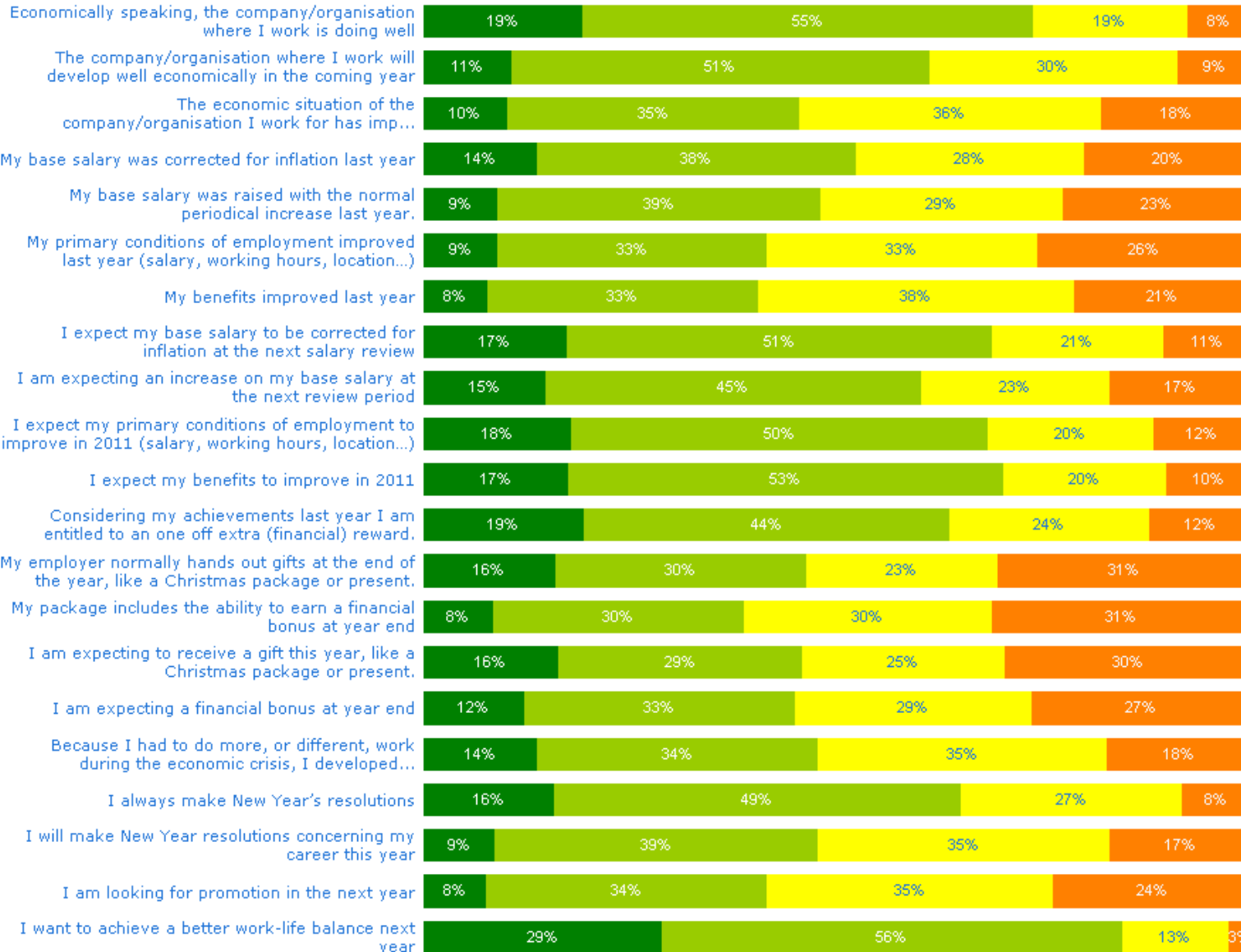


- More than half of the Italian employees (55%) state that the company/organization they work for will develop well economically in the coming year.
- Only 39% of the Italian employees state that their primary employment conditions improved last year.
- But the Italians are optimistic about the upcoming year; seven out of ten Italian employees (70%) expect their primary conditions of work to improve in 2011.
- Nearly half of the Italian employees (47%) is expecting a gift or a financial bonus at the end of the year.
- In comparison to Greece, Spain and Turkey, Italians feel most that they are entitled to a one off extra reward considering their achievements last year.
- Most Italian employees are looking for a promotion in the next year (60%).



# Spain

## Press statements



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

- More than seven out of ten Spanish employees (74%) indicate the company/organization they work for is doing well.

- Approximately four out of ten Spanish employees state that their primary employment conditions (42%) and benefits (41%) improved last year.

- 70% of the Spanish employees expect their benefits to improve next year.

- 45% of the Spanish employees is expecting a gift or a financial bonus at the end of the year.

- In Spain, 65% of the employees always make New Year's resolutions and 48% also make resolutions regarding their career.

# Turkey

## Press statements



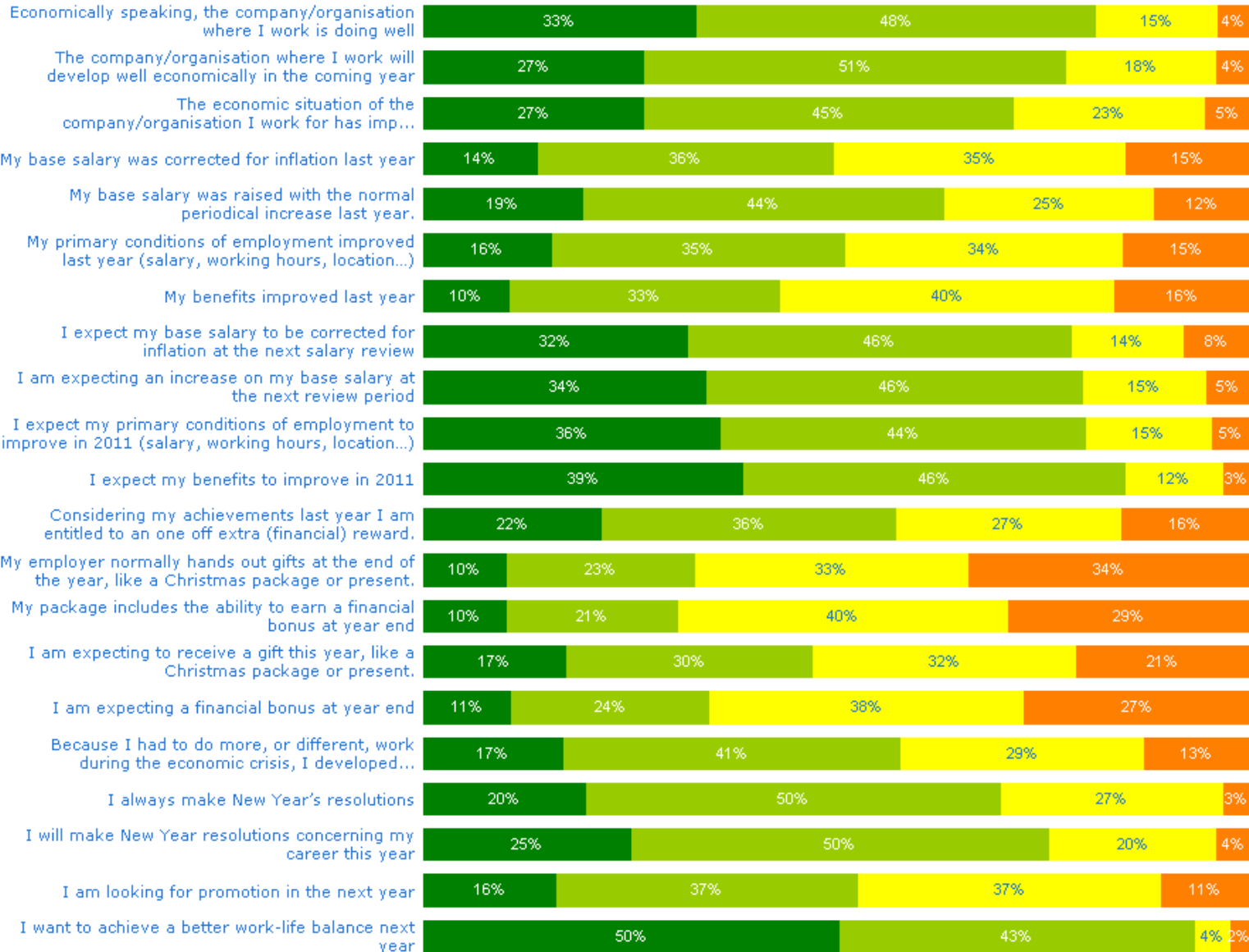
- According to almost eight out of ten Turkish employees (78%) the company/organization they work for will develop well economically in the coming year.

- 51% of the Turkish employees state that their primary employment conditions improved last year and 43% of the employees state that their benefits improved during this period of time.

- Turkish employees have high expectations for 2011; they expect an increase on their base salary at the next review period (80%), and better primary employment conditions (80%) and benefits (85%) next year.

- Nearly half of the Turkish employees is expecting a gift this year from their employer.

- More than in Spain, Greece and Italy, Turkish employees want to reach a better work-life balance next year.

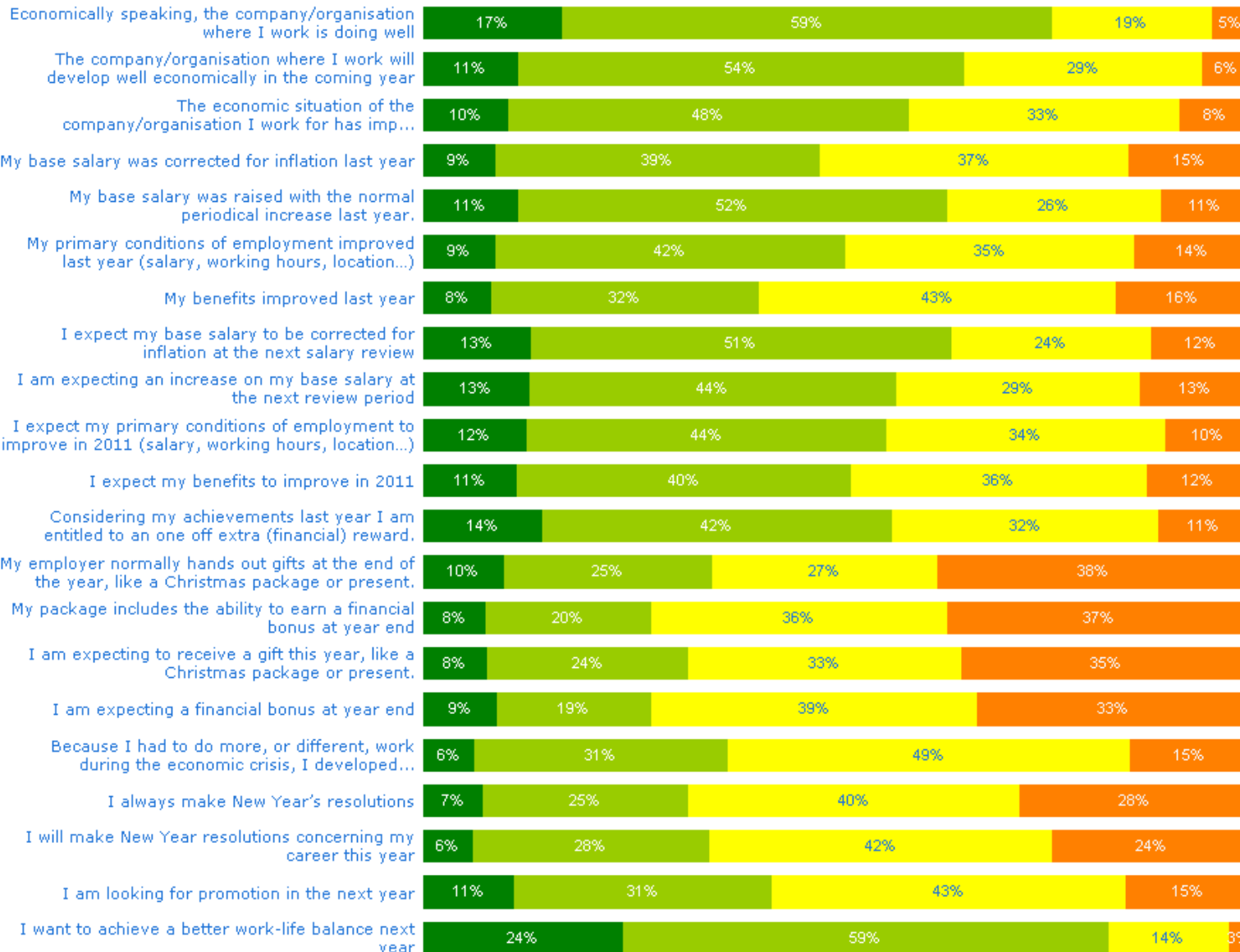


■ strongly agree ■ agree ■ do not agree ■ strongly disagree

# Australia



## Press statements



■ strongly agree 
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- 51% of the Australian employees state that their primary employment conditions improved last year and 40% of the employees state that their benefits improved during this period of time.

- More than half of the Australian employees (57%) is expecting an increase on their base salary at the next salary review.

- Compared to Canadian and American employees, a larger share of Australian employees state that they are entitled to a (financial) reward considering their performance last year.

- Almost one third of the employees (32%) is expecting a gift this year, like a Christmas package or present.

# Canada

## Press statements



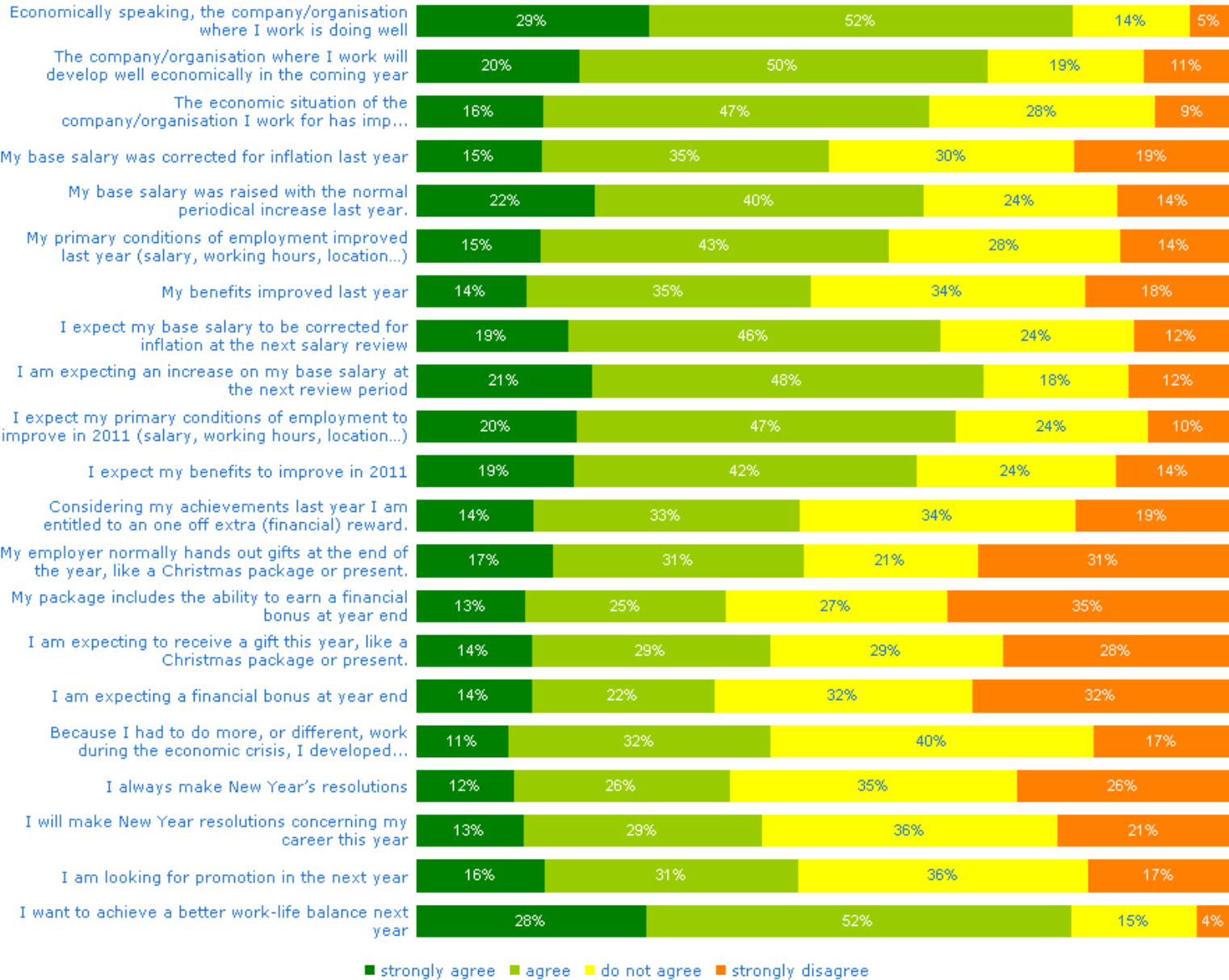
- More than eight out of ten Canadian employees indicate the organization/company they work for is doing well.

- In comparison to Australian and American employees, a larger share of Canadians state that their primary employment conditions (58%) and benefits improved last year (49%).

- Nearly seven out of ten Canadian employees are expecting a pay raise at the next review period (69%). The same amount of employees expect their primary employment conditions to improve next year (67%).

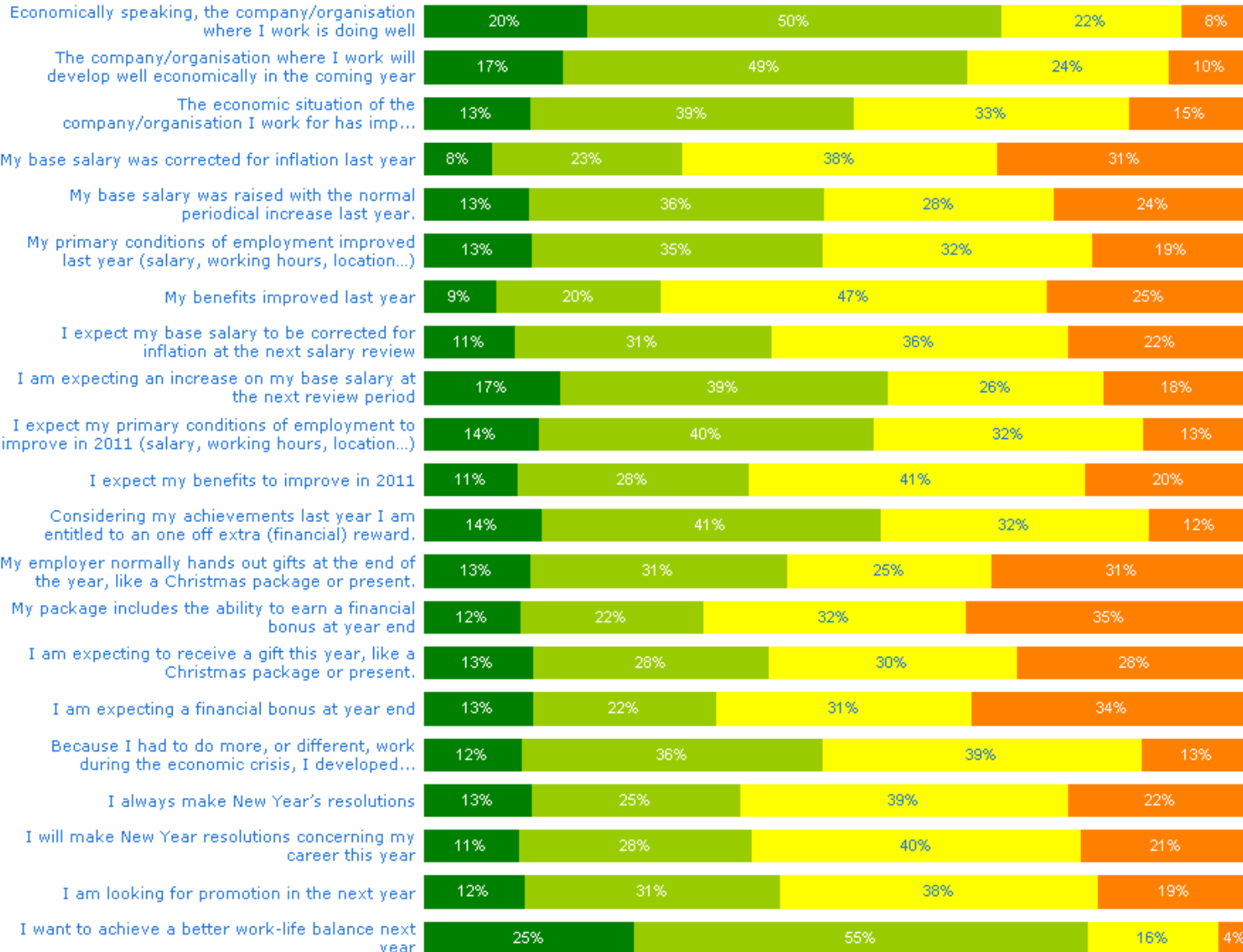
- Almost half of the Canadian employees (48%) state that their employer normally hands out gifts at the end of the year. Accordingly, 43% also expects a gift this year.

- Approximately four out of ten employees always make New Year's resolutions (38%). This also includes resolutions regarding their career (42%).





Press statements



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

- 70% of the American employees state that the company/organization they work for is doing well.

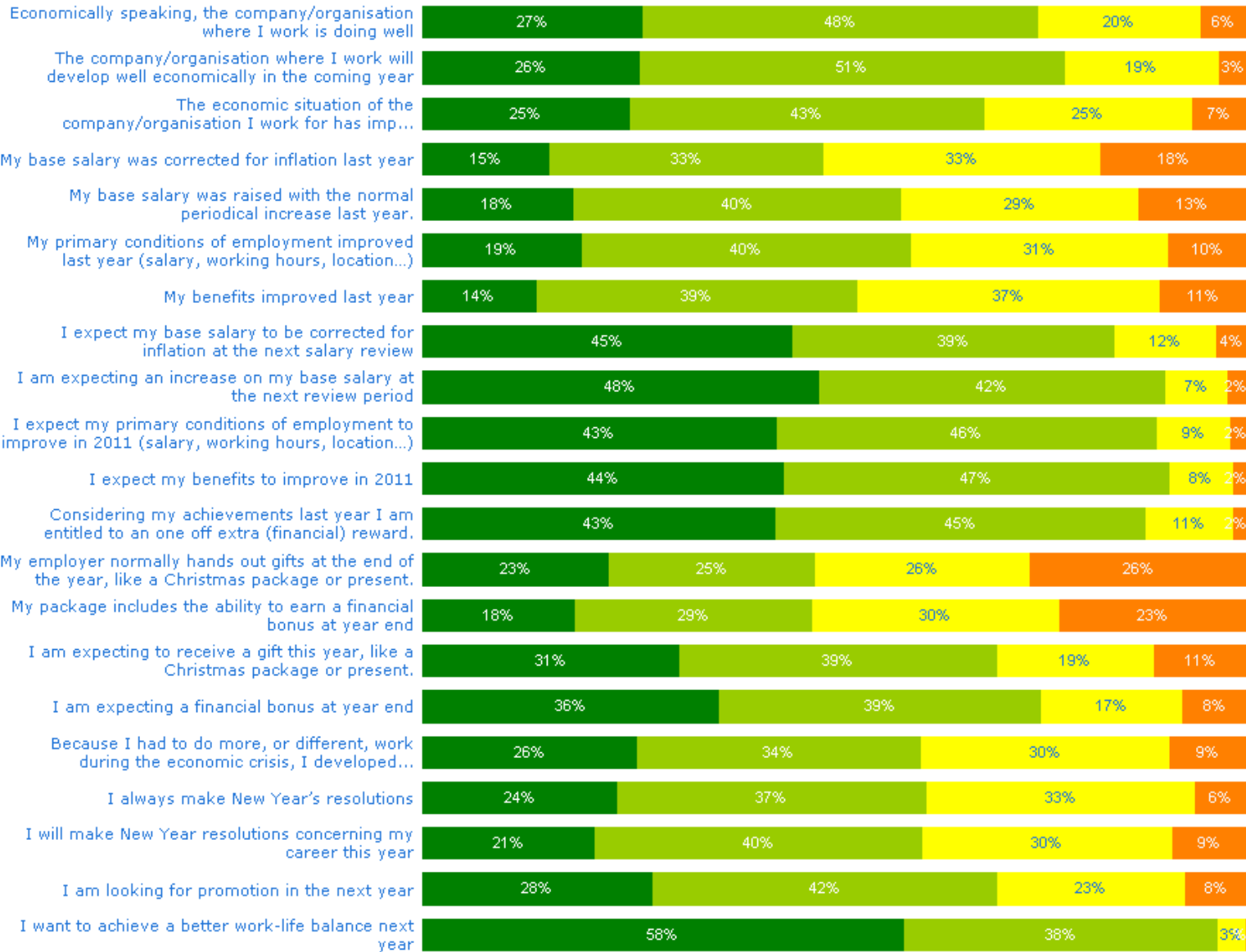
- The base salary of almost half of the American employees (49%) was raised with the normal periodical increase last year.

- 56% of the American employees is expecting a pay raise at the next review period.

- Most American employees don't expect a financial bonus at year-end (65%).

# Argentina

## Press statements



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

- 77% of the Argentinean employees believe the company/organization they work for will develop well in the coming year.

- Almost six out of ten Argentinean employees (59%) state that their primary employment conditions improved last year, 53% indicate their benefits improved during this period of time.

- Argentinean employees have high expectations for 2011. They expect pay raise at the next review period (90%) and they expect their primary employment conditions (89%) and benefits (91%) to improve next year.

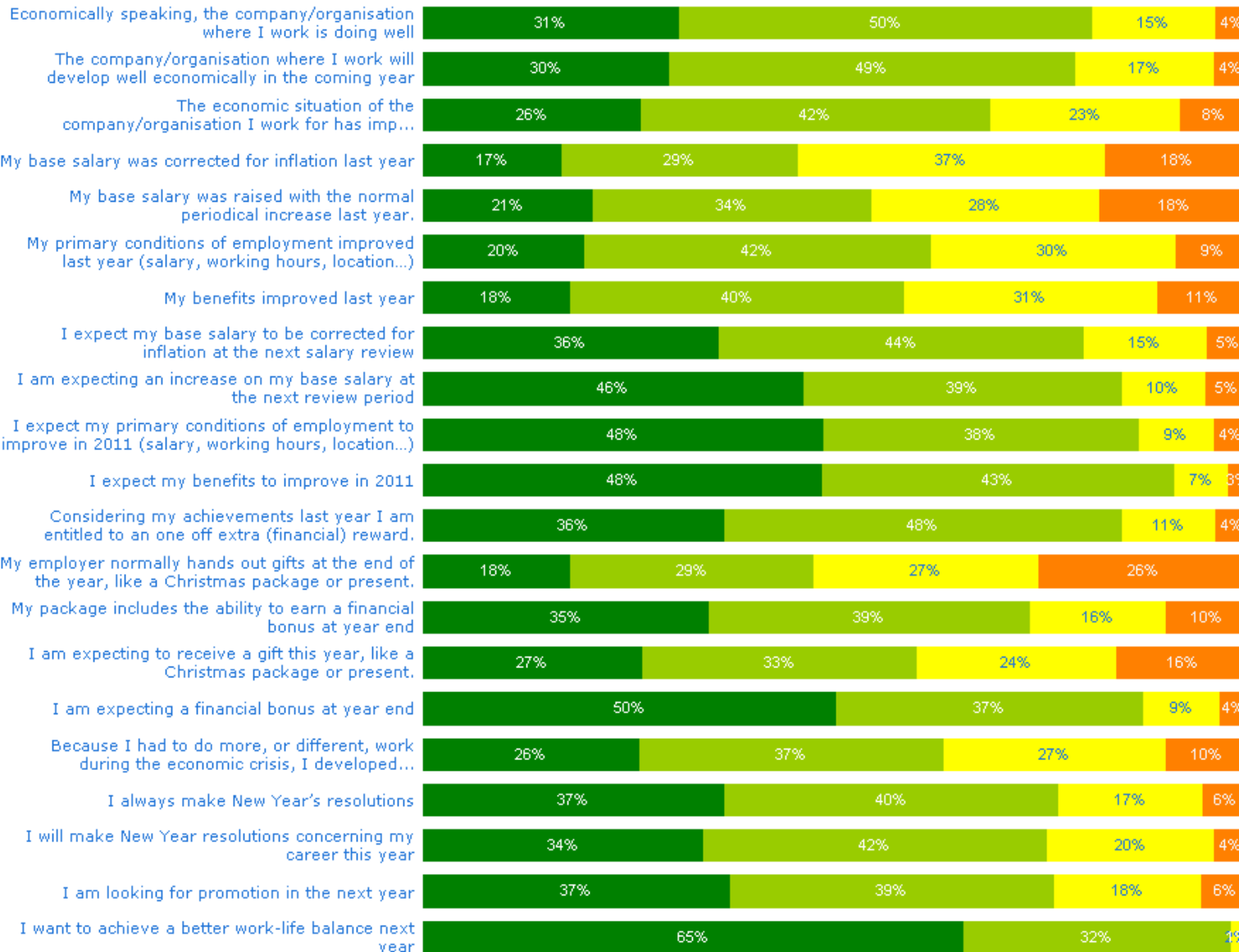
- Relatively more Argentinean employees feel they are entitled to an extra reward considering their performance last year than Mexican employees.

- 75% of the Argentinean employees are expecting a financial bonus at year-end.

# Mexico



## Press statements



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

- Approximately six out of ten Mexican employees indicate that their primary employment conditions (62%) and benefits improved last year (58%).

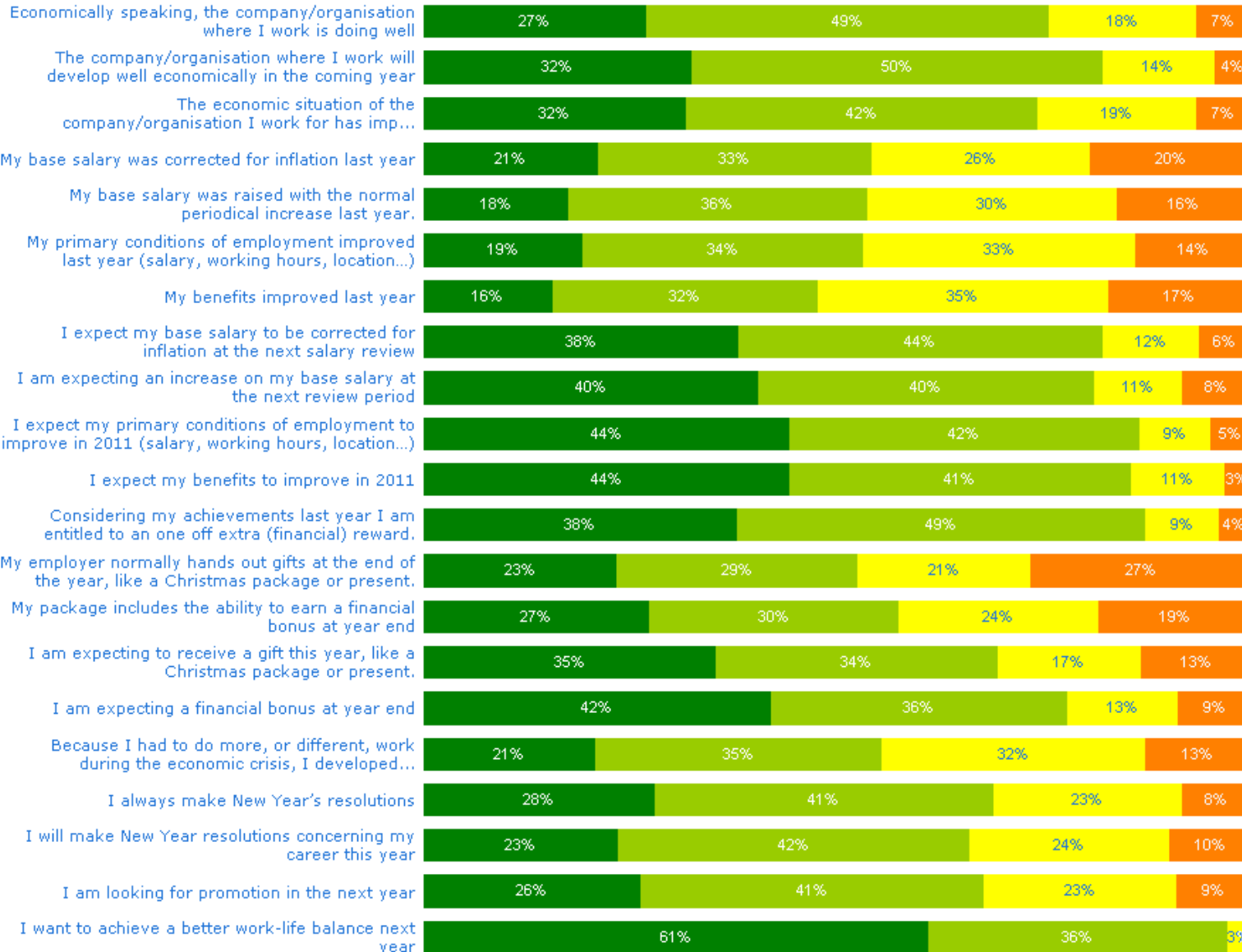
- Just like in Argentina, the Mexican employees have high expectations for 2011. Many expect their primary employment conditions (86%) and benefits (91%) to improve next year.

- Mexicans employees expect a financial bonus at year-end (87%) more than Argentinean employees do.

- Almost every Mexican wants to achieve a better life-work balance next year (97%). This is the largest share within all participating countries in this study.



## Press statements



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

- Most Chilean employees state the company or the organization they work for will develop well economically in the coming year (82%).

- The base salary of more than half of the Chilean employees was raised with the normal periodical increase last year (54%).

- Additionally, Chilean employees expect their primary employment conditions to (further) improve in 2011 (86%).

- Also, almost eight out of ten employees expect a financial bonus at the year-end (78%).

- For the upcoming year, nearly every Chilean employee wants to reach a better work-life balance next year (97%).

# China

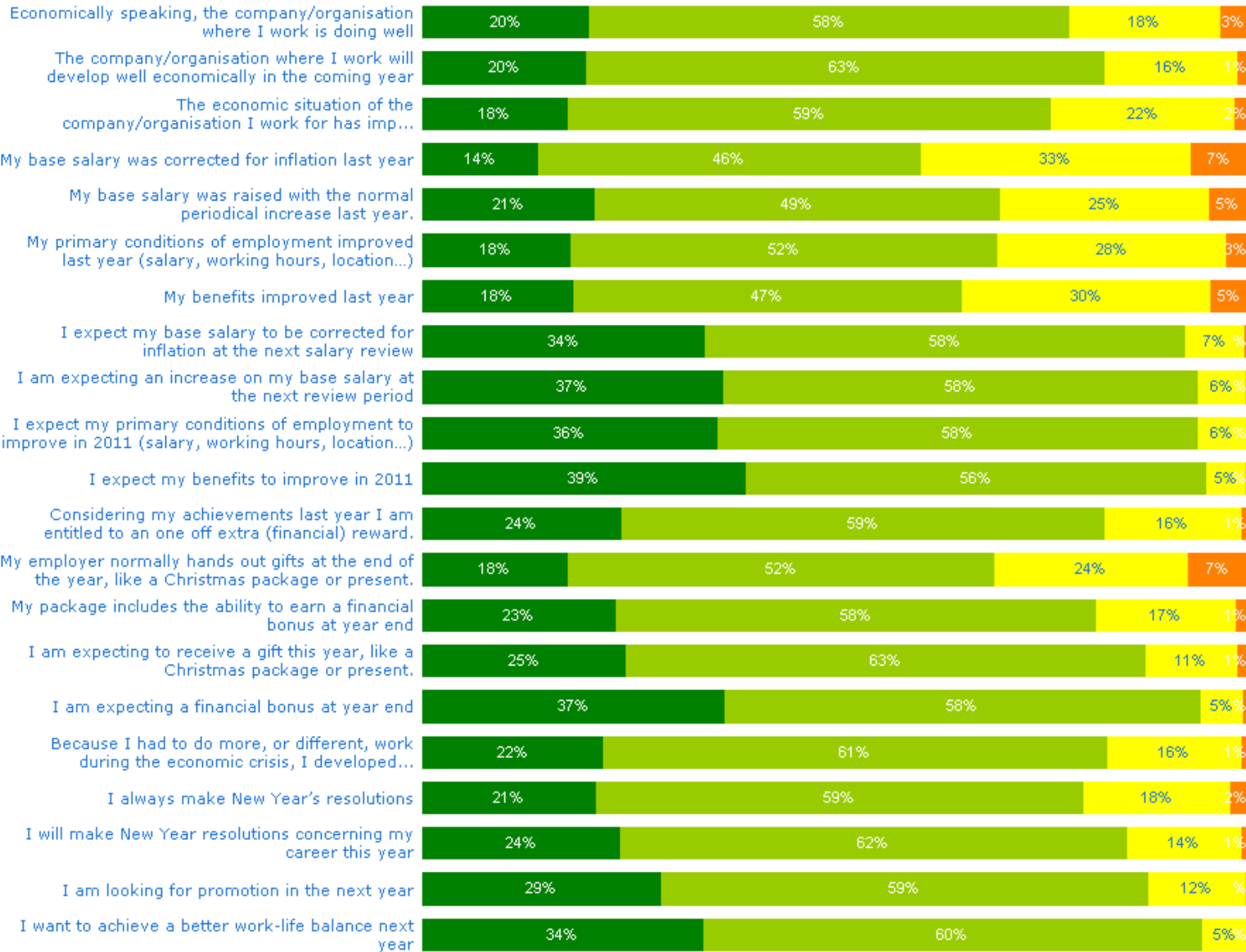
## Press statements



• 70% of the Chinese employees state that their primary employment conditions improved last year. Also, 65% state that their benefits improved during this period of time.

• Chinese employees expect an increase on their base salary at the next review period (95%) and they expect their primary employment conditions (94%) and their benefits (95%) to improve next year.

• 88% of the employees are looking for a promotion in the next year.

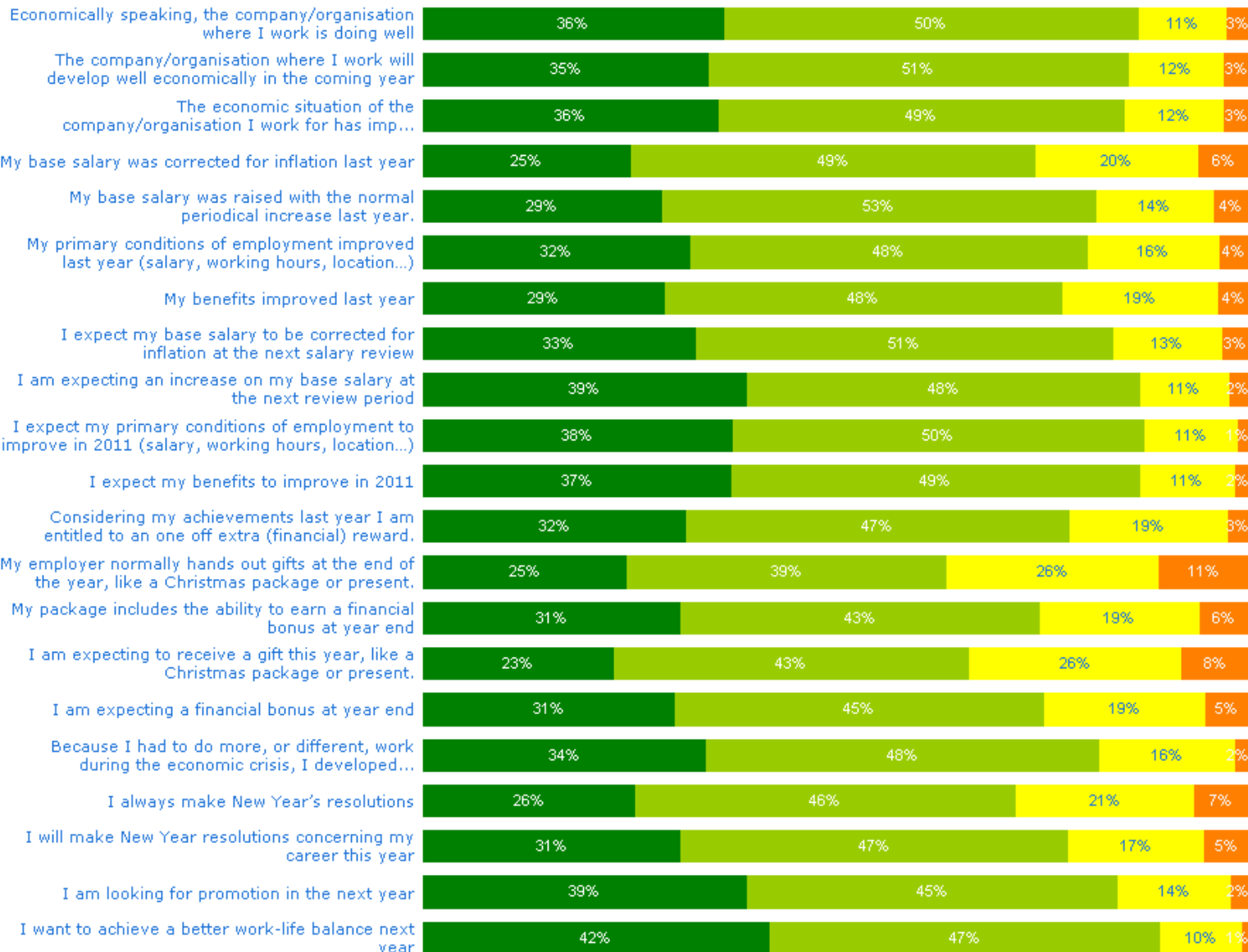


■ strongly agree ■ agree ■ do not agree ■ strongly disagree

# India



## Press statements



■ strongly agree 
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 ■ do not agree 
 ■ strongly disagree

- Most Indian employees (86%) indicate that the company/organization they work for is doing well.

- The primary employment conditions and benefits of Indian employees improved last year (80% and 77%).

- Indian employees expect an increase on their base salary at the next review period (87%) and their primary employment conditions (88%) and benefits (86%) to improve next year.

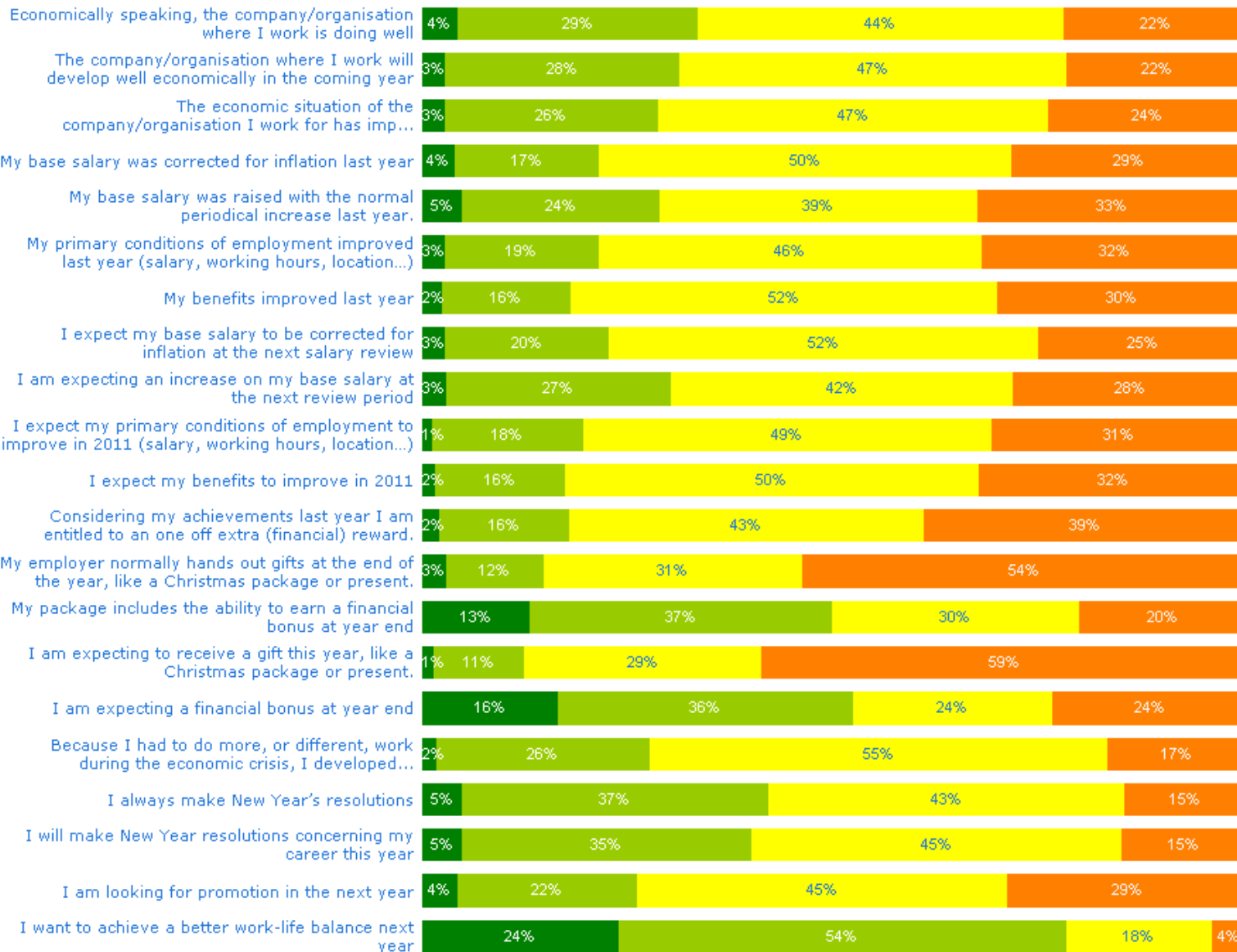
- 76% of the employees is expecting a financial bonus at year-end.

- The amount of employees that is looking for a promotion in the next year is large (84%).

# Japan



## Press statements



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

- Only 33% of the Japanese employees state that the company/organization they work for is doing well.

- For 29% of the Japanese their base salary was raised with the normal periodical increase.

- In addition, three out of ten Japanese employees expect an increase on their base salary at the next review period.

- More than half of the employees (52%) is expecting a financial bonus at year-end.

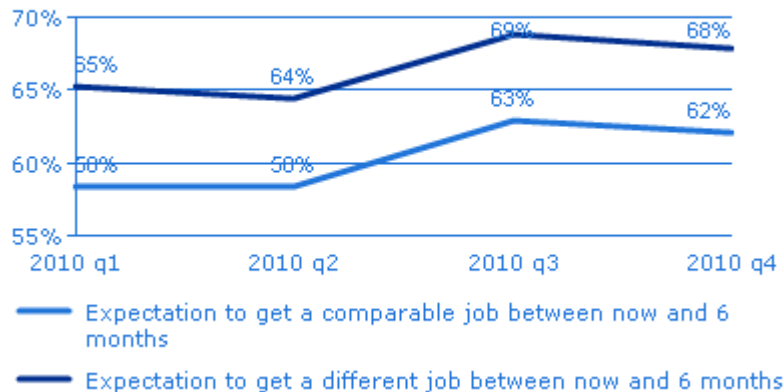
- 78% of the Japanese employees want to achieve a better work/life balance next year.

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## The level of confidence in finding a new job is stable

Trust



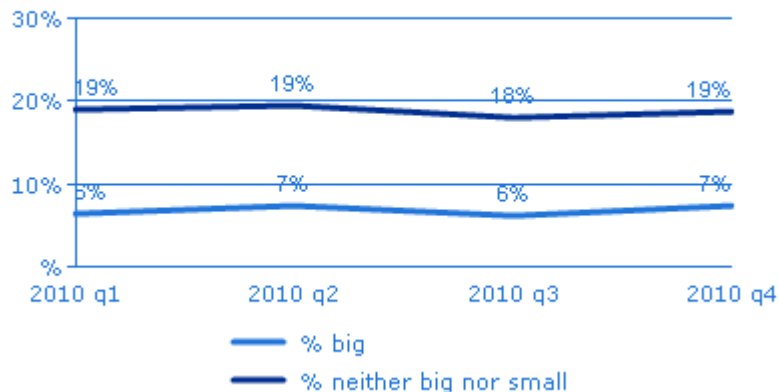
Changes	↑	↓
Spain		**8%
Greece		*7%
UK		*9%
India	*5%	
Japan		*8% **8%

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



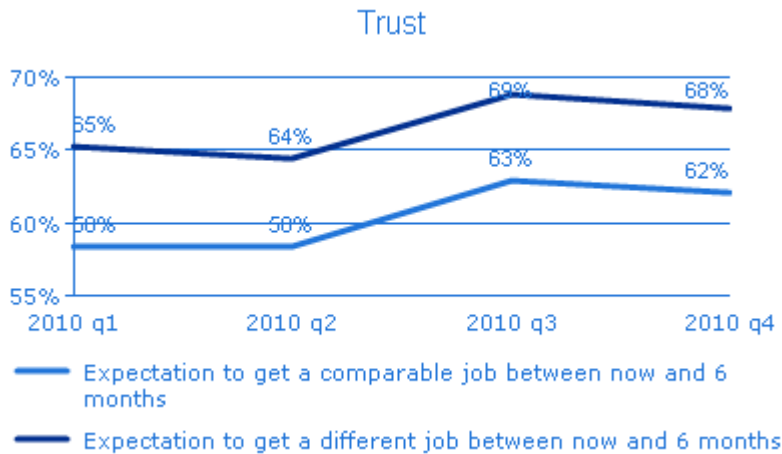
Changes	↑	↓
Belgium	**5%	
Switzerland	*5% **8%	
Denmark	*6%	
India	*7%	
Slovakia		**8%

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?

- \* change in the first category
- \*\* change in the 2nd category

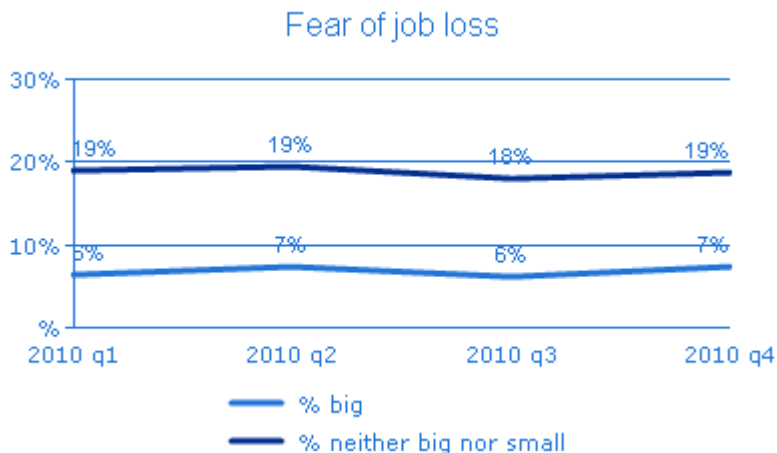
## Employees in Spain, Greece, the UK and Japan are a little less confident in finding a new job within six months.



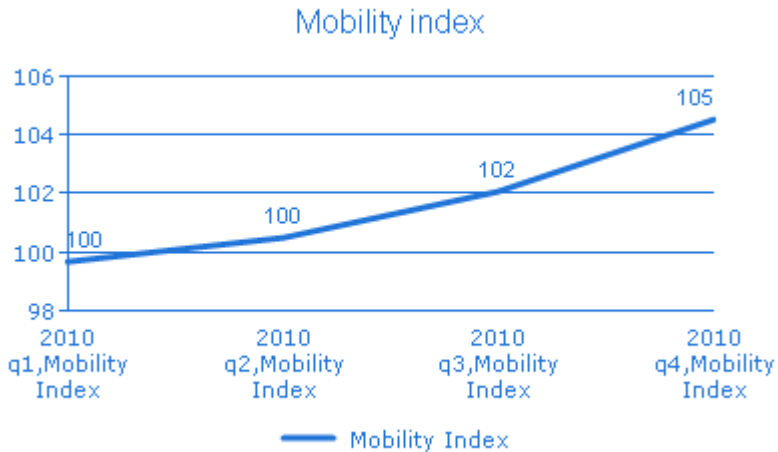
In most of the countries the level of confidence in finding another job in 6 months is the same as it was three months ago. The level of confidence in finding a new job, different or comparable, is still higher than at the start of 2010. The slight 'dip' in the overall confidence level, is a result of a decreased level of confidence in Spain, Greece, the UK and Japan. The confidence in finding a new comparable job within six months decreased the most in the UK (-9% to 55%).

India is the only country where employees have more confidence in finding a comparable job within the next six months. Three months ago 85% percent of Indian employees indicated they expect to find a new job within six months, in Q4 90% expects it. This makes India the country where employees are most positive about finding a new comparable job.

Indian, Belgian, Swiss and Danish employees are more fearful about losing their job than three months ago. Which results in a slightly higher overall share of employees who fear for job loss.



## Mobility keeps rising. The share of employees that actively look for a new job remains the same.



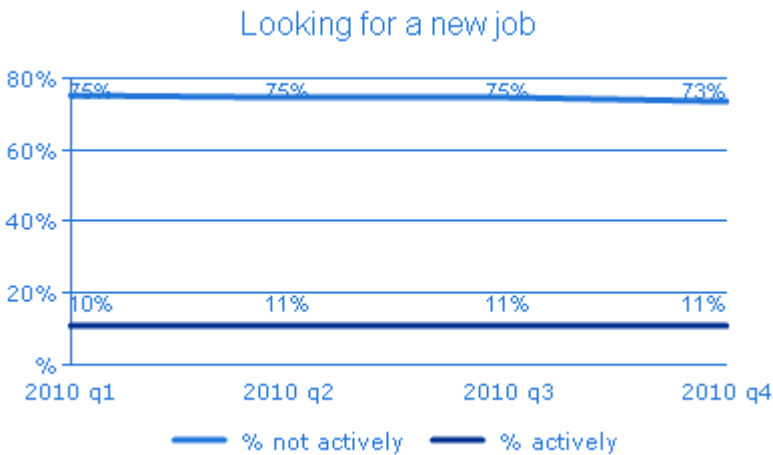
Changes	↑	↓
Switzerland	11	
Denmark	10	
India	13	
Japan		5

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?



Changes	↑	↓
Denmark		*6%
Greece		**5%
Hungary		**6%
Czech Republic		*7%
India		*7%
Japan	*8%	

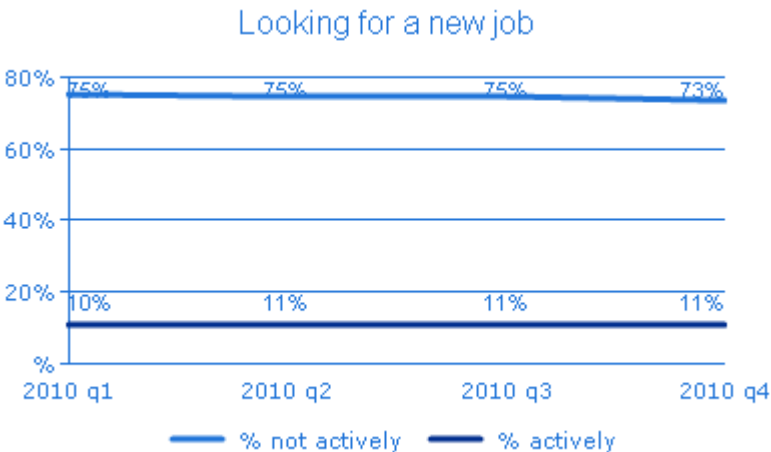
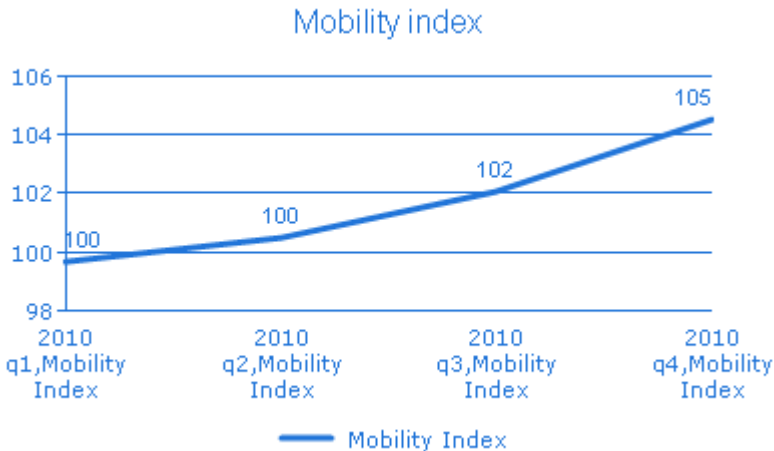
Question:

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

• \* change in the first category

• \*\* change in the 2nd category

## Mobility has kept on rising. The share of employees that actively look for a new job remains the same.



The overall mobility index is higher than in the third quarter of 2010. The index increased by almost three points from 102 to 105. The mobility index has kept on rising.

As described earlier, the younger the employees, the more mobile they are. The young employees expect the most that they will have another job in six months.

Most countries have a higher index this quarter but the biggest increases are found in India, Switzerland and Denmark. In these countries the index has grown with ten or more points. India now has a mobility index of 153.

The increases in mobility within these three countries, can partially be explained by the increased amount of employees in these countries who fear that they will lose their job. The employees who think the chances are big that they will lose their job (p. 37-38), might also predict more that they will have changed job within the upcoming six months.

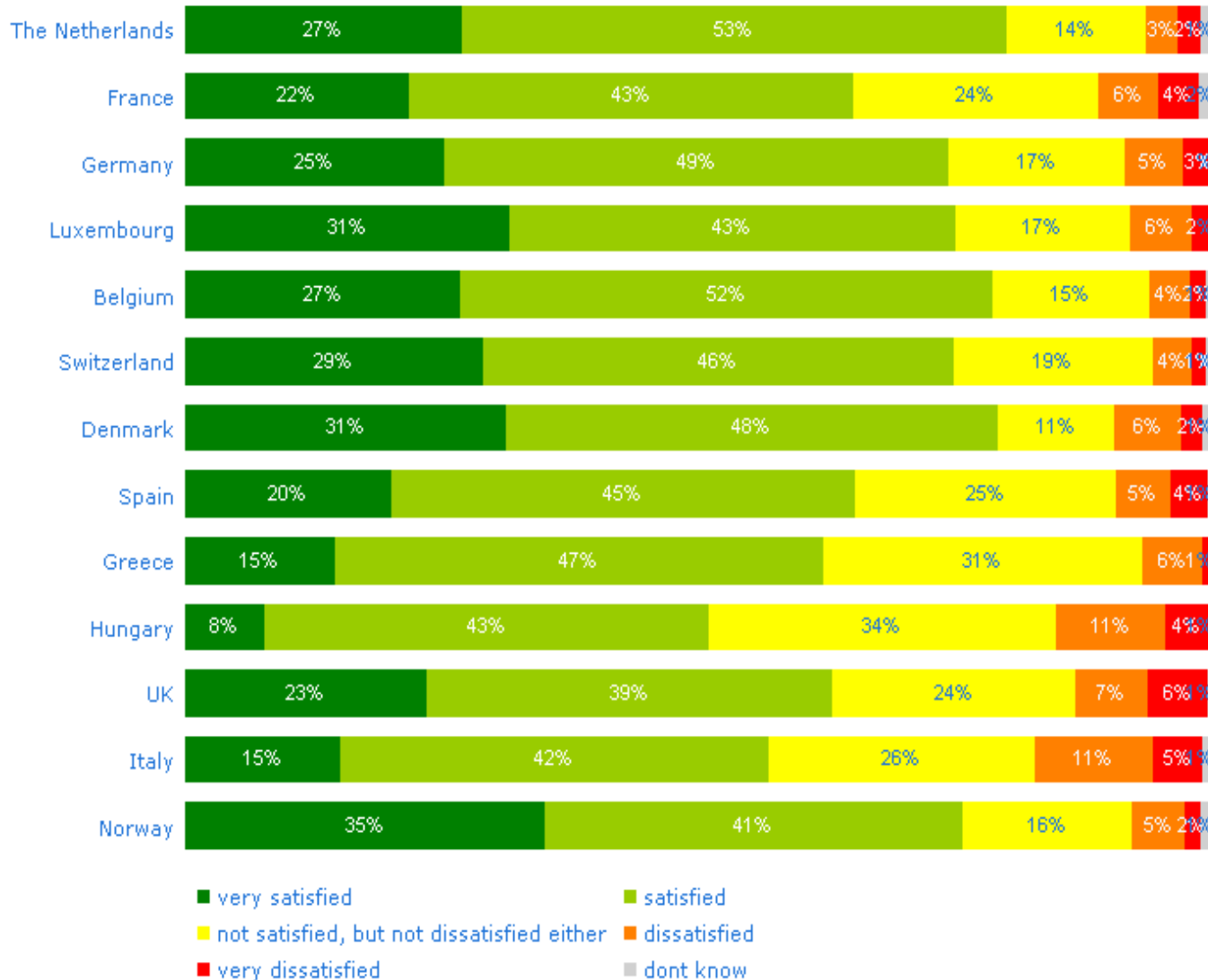
The increased fear (described earlier on p. 38), doesn't result into an increase of employees who are actively looking for another job. The overall percentage of people not actively looking for a new job decreases is also stable

# Index

- chapter 1: primary employment conditions and benefits
- chapter 2: mobility
- **chapter 3: satisfaction**
- chapter 4: personal motivation

# Satisfaction

## Satisfaction



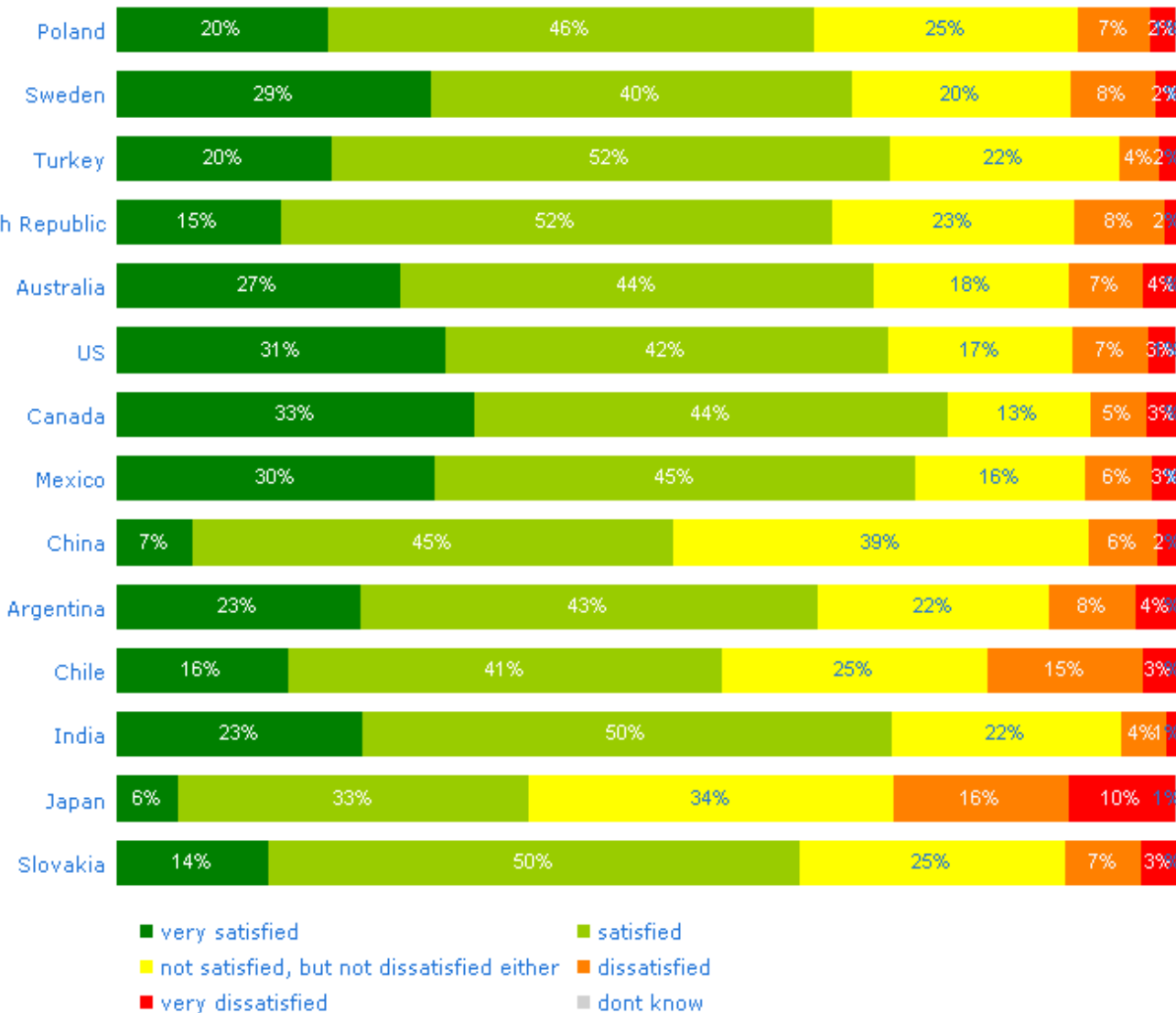
The Netherlands have the biggest share of (very) satisfied employees (80%). The average percentage of employees being (very) satisfied with their current employer is 68% which is the same as in the third quarter of 2010.

Question:

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

# Satisfaction

Satisfaction



Turkey is the only country where the job satisfaction grew compared to three months ago. The percentage of employees being (very) satisfied grew from 66% to 72%.

European countries are overall equally satisfied as Australia and American countries.

In Asian countries, a relatively small amount of employees are (very) satisfied with their employer. Japan has the lowest percentage of employees stating to be (very) satisfied (39%).



= more often (very) satisfied compared to Q3 2010

Question:

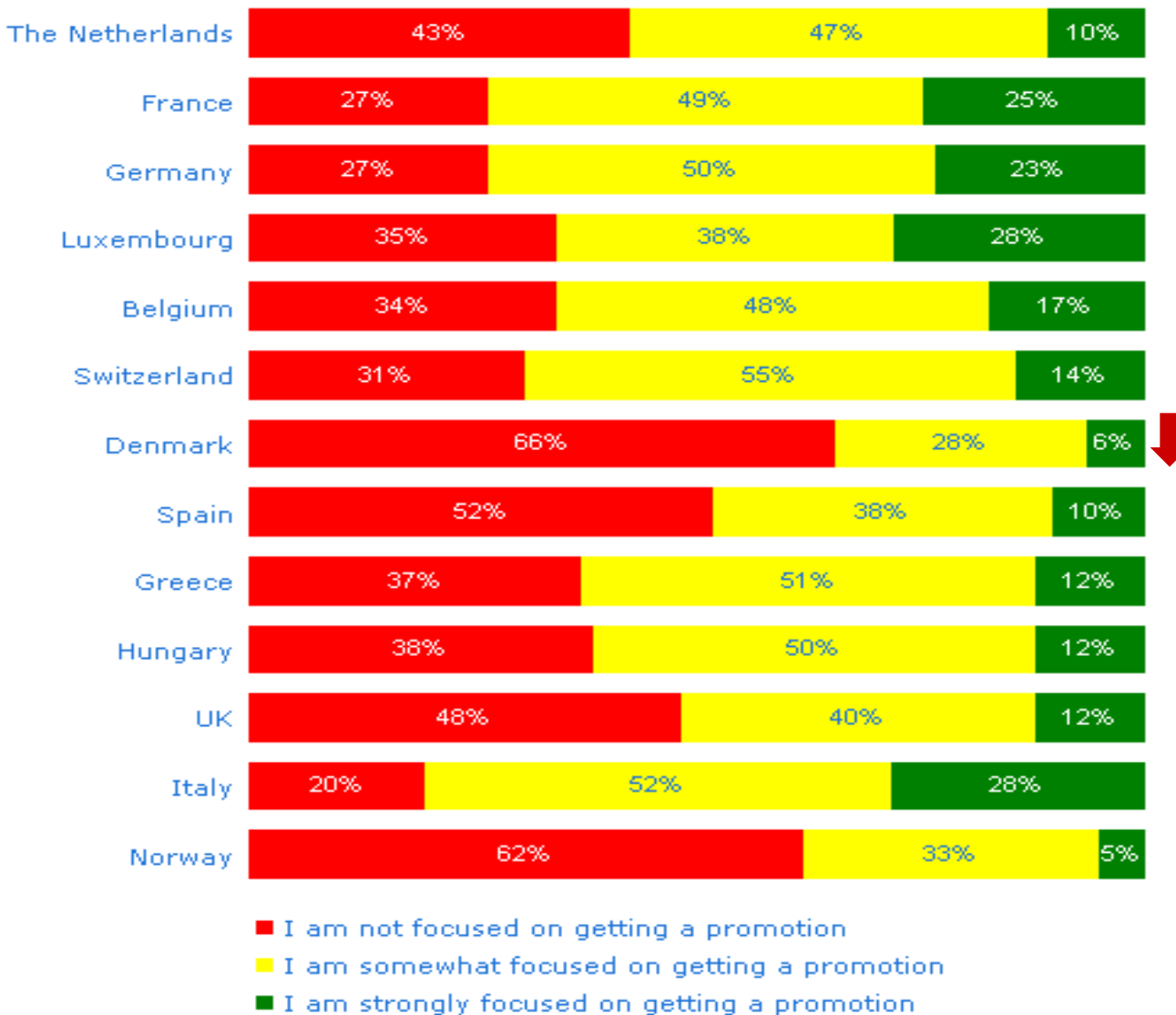
How satisfied are you in general to work for your current employer?

# Index

- chapter 1: primary employment conditions and benefits
- chapter 2: mobility
- chapter 3: satisfaction
- chapter 4: personal motivation

## Personal motivation

### Focus on promotion



Overall, one out of five employees says to be strongly focused on getting a promotion. This is similar to three months ago.

People are less focused on getting a promotion compared to Q3 in Denmark and Japan.

Norway and Denmark have the lowest percentage of employees being strongly focused on a promotion.

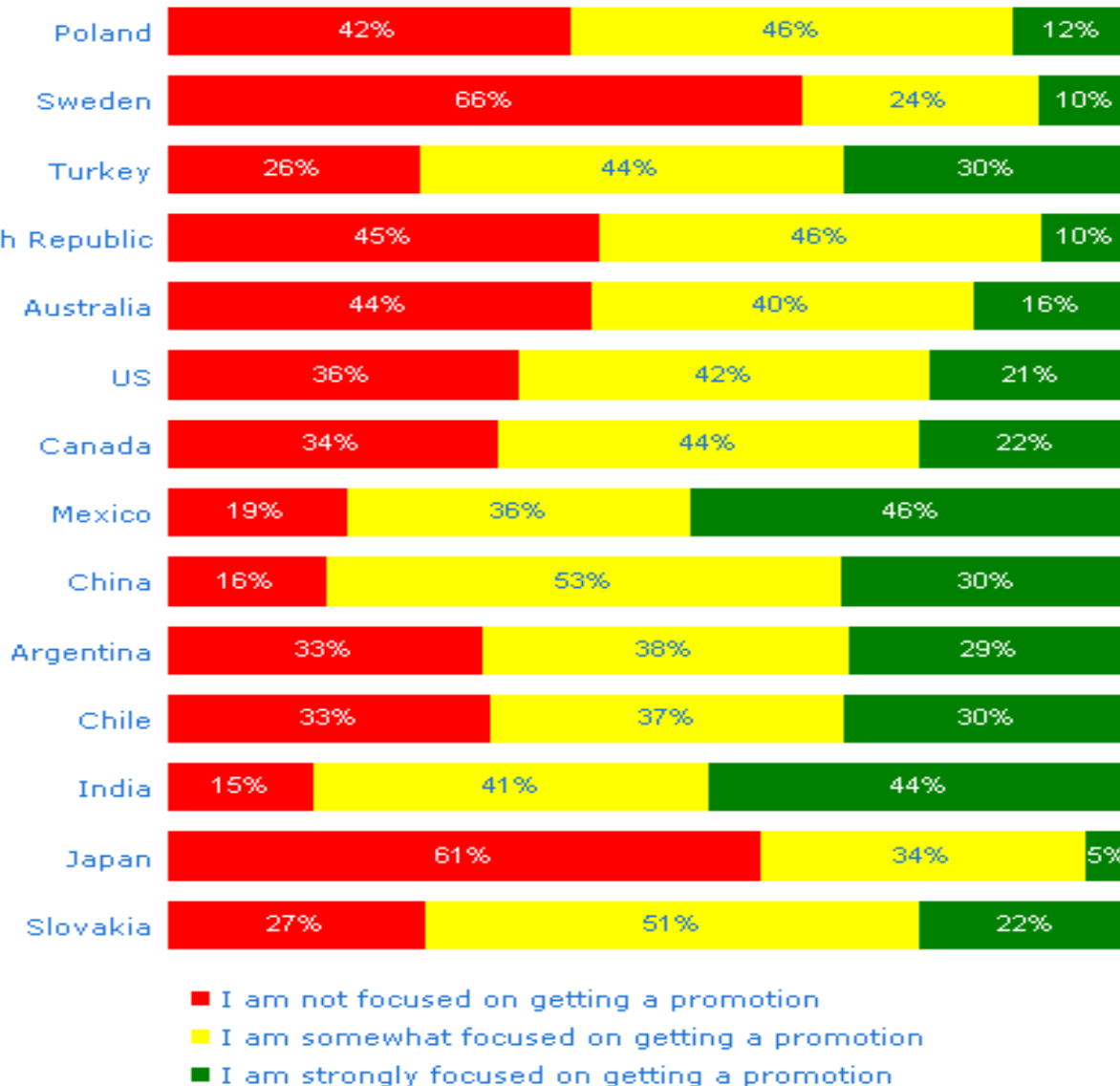
↑ = more focused on promotion compared to Q3 2010

↓ = less focused on promotion compared to Q3 2010

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

## Personal motivation

### Focus on promotion



In India 85% of the employees indicate to be (somewhat) focused on a promotion. This is the highest percentage. The lowest percentage is found in Sweden (34%). Mexico has the highest percentage of people who are strongly focused on promotion (46%).

Turkey has a higher percentage of employees focused on getting a promotion compared to three months ago. This makes it the only country where employees are getting more focused on a promotion.



= more focused on promotion compared to Q3 2010



= less focused on promotion compared to Q3 2010

Question:

To what extent are you focused on getting a promotion?

# More information

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