



Randstad Workmonitor global findings wave 3, 2010

Randstad Holding nv

September 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 26 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 August 5-22, 2010.

Participating countries:

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

wave 2 summary (1) – Personal growth

Recession also seems to have a positive effect

The economic crisis has had a fair amount of negative effects on the job markets all around the world. But it seems that the recession also has worked in favor for some employees. This is the case for those who state that they have developed faster than they normally would have because they had to work harder or had to do different kinds of work during the recession. Especially Indian, Chinese, Mexican and Argentinian employees did actually benefit from the crisis in this particular area, so they say.

Personal growth is a shared responsibility of employer and employee

All over the world employees state that, as an employee, you have to take the initiative yourself in order to have a career development. Nevertheless, as an employee you should be able to rely on the obligation employers have to support you in your personal career development. The actual stimulus given by employers to employees to keep on developing differs per country. Roughly taken, about 60% of the employers worldwide do so according to employees. In general, employers in western countries seem to put more effort in stimulating employees than employers in other parts of the world.

wave 2 summary (2) – Personal growth

Most of the employees want to keep developing themselves, but the goal is not always clear

In most countries a vast majority of the employees intend to keep developing themselves during their whole career. The actual direction is not always clear; the number of employees that is certain about the goals they like to achieve in the next five year is small.

Employees all over the world seem to agree that personal growth is not purely work related nor purely a matter of personal development outside the job. Therefore most employees state that personal growth should be considered as a combination of the two. In addition, in most countries only a minority of the employees consider personal growth purely as getting ahead in their jobs.

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

The worldwide economic recovery seems to have its effects on the confidence employees have in finding a new job. In many countries confidence has increased. Among them are for instance many countries in Western Europe like France, Germany, the Netherlands, and Sweden. But also Canada, India and Japan benefit from the economic prosperity.

Although trust in finding a comparable or even different job is increasing in many countries, the fear of losing a current job is not declining. Apparently somehow overall confidence in the recovery of the economy has not increased enough for employees to be certain about their current position.

In addition job mobility worldwide remained practically the same over the past three months. Only a few countries are experiencing an increase in employee mobility. Those are Japan, Spain, Switzerland, Sweden and Turkey.

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

All the first signs of increase in economic trust are there, but employees need some more confidence to actually be sure about keeping their current job and the willingness to look for a new job.

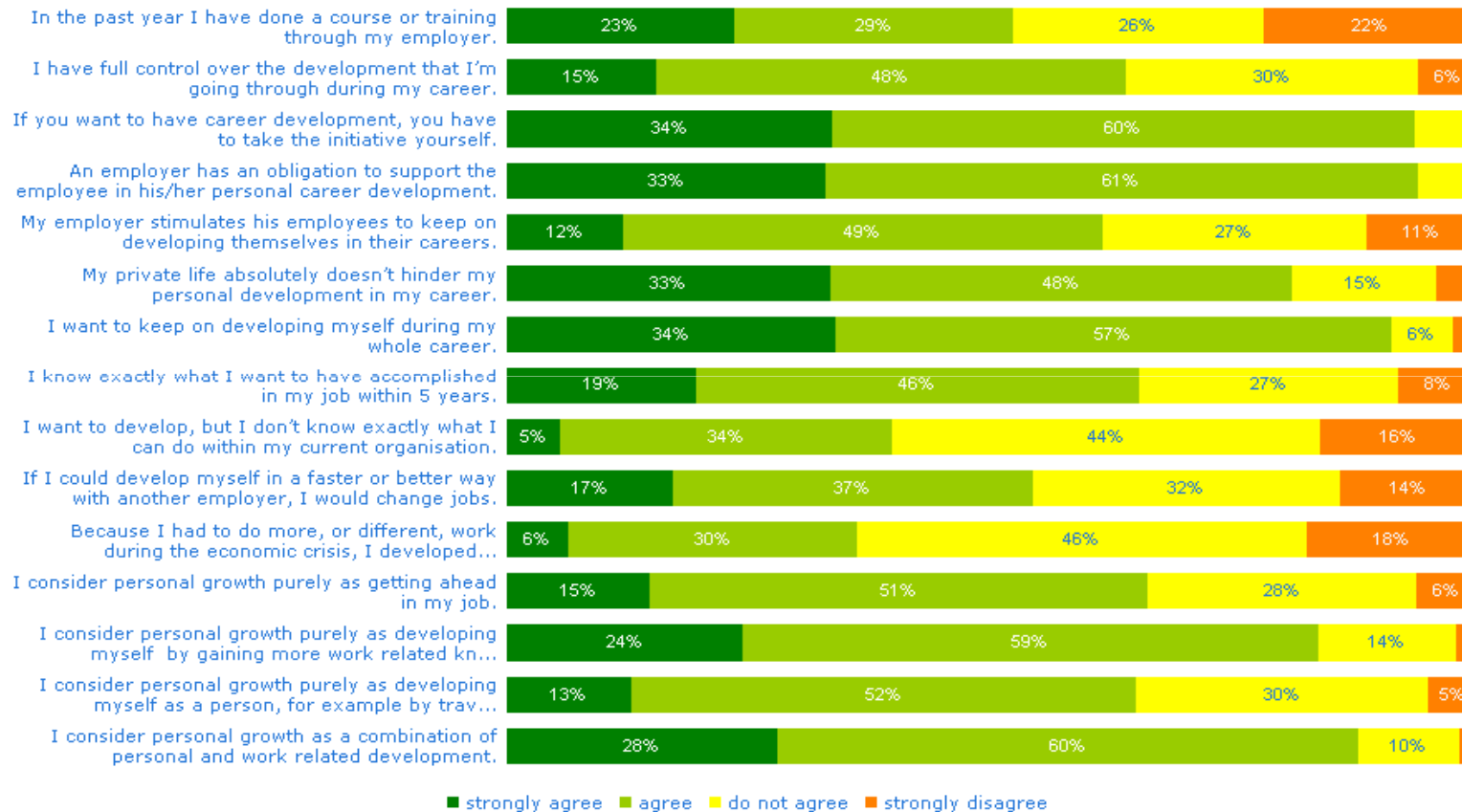
index

- chapter 1: Personal growth
- chapter 2: mobility
- chapter 3: satisfaction
- chapter 4: personal motivation

Belgium



Press statements



• Like Dutch and Luxembourg employees, almost every Belgian employee (94%) states that if they want to have a career development, they have to take the initiative themselves.

• In addition, the same number of employees says that employers also have the obligation to support the employee in his/her development (94%).

• Approximately, one out of three Belgian employees (36%) developed faster than they normally would have done, because of more, or different work they did during the economic crisis.

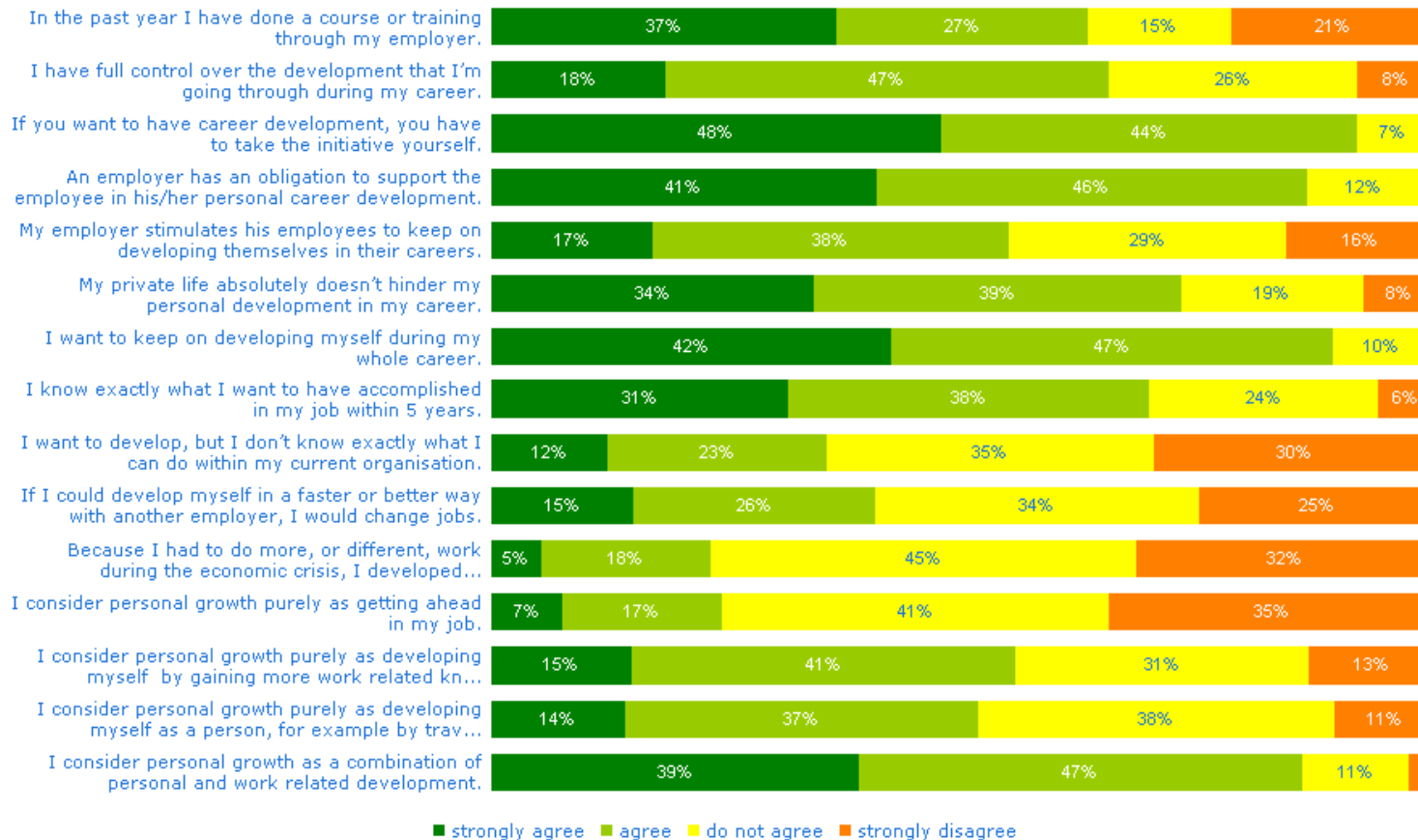
• Many Belgian employees describe personal growth mainly as a combination of personal and work related development (88%).



Luxembourg



Press statements



- 64% of the employees in Luxembourg state that in the past year they have done a course or training through their employers. That is a little more than their colleagues in The Netherlands and Belgium.

- 92% of the employees state that if they want to have a career development, they have to take the initiative themselves. However, 87% state that an employer has an obligation to support the employee in his/her personal career development as well.

- About 23% of the Luxembourgers state that because they had to do more, or different, work during the economic crisis, they developed faster, than they normally would have done.

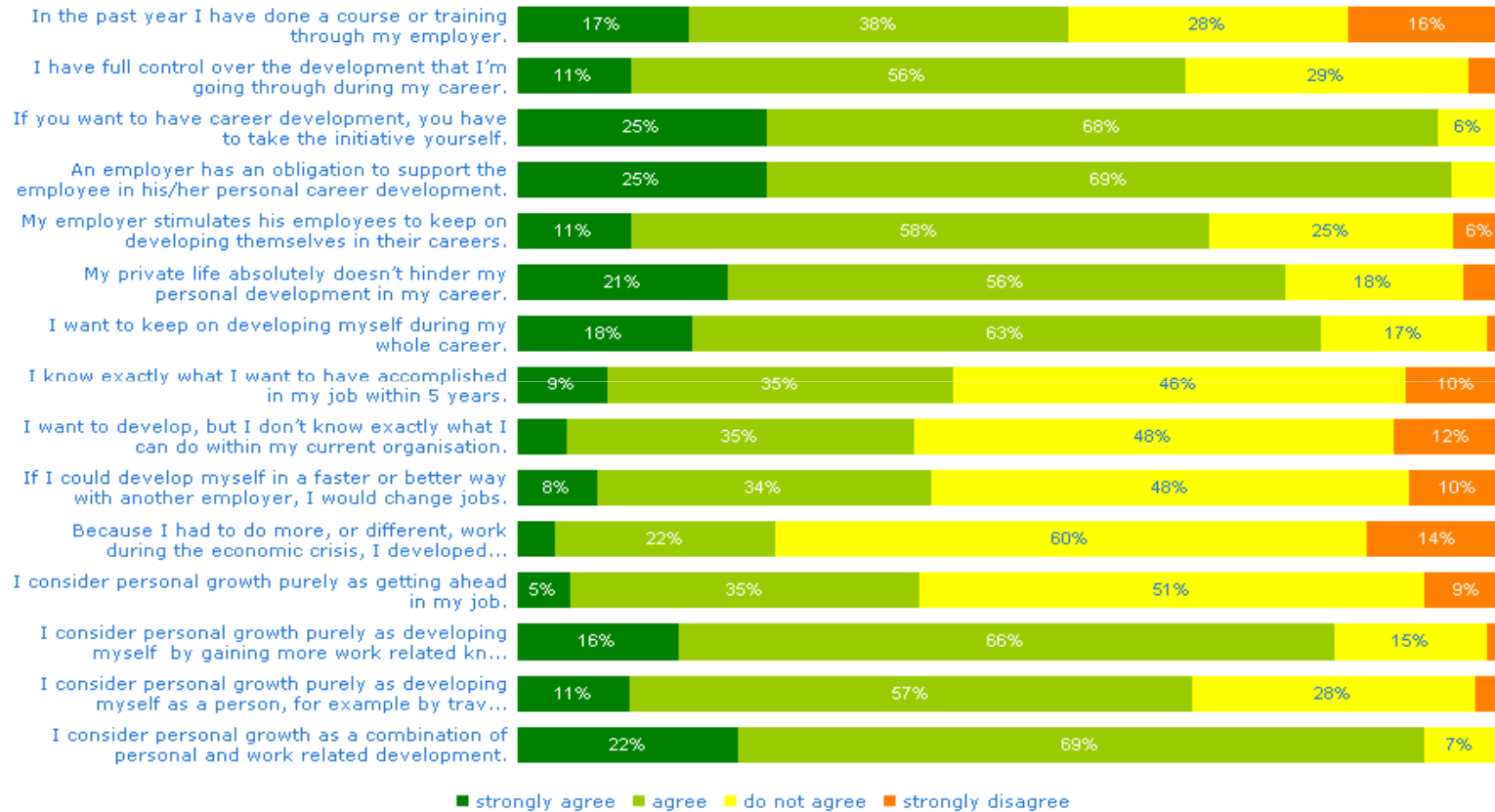
- More than their Dutch and Belgium colleagues, Luxembourgers strongly agree with the statement that personal growth is a combination of personal and work related development.



Netherlands



Press statements



- No more than 26% of the Dutch employees state that because they had to do more, or different, work during the economic crisis, they developed faster than they normally would have done.

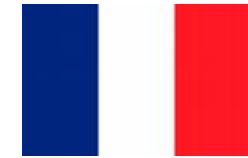
- A striking 93% of the Dutch employees state that they have to take the initiative themselves if they want to have their careers developed.

- Most Dutch employees intent to keep on developing themselves during their careers (81%).

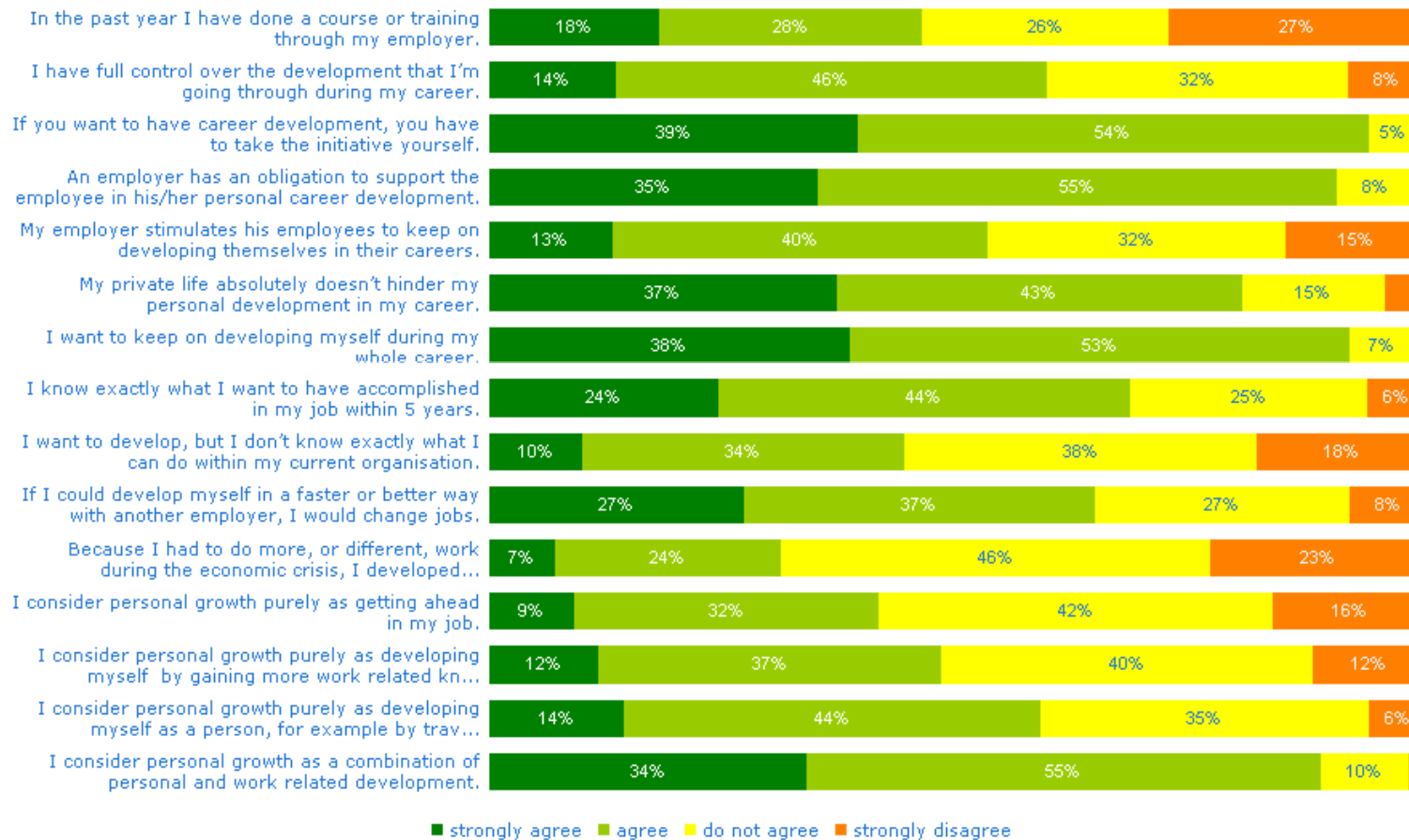
- Nine out of ten Dutch employees consider personal growth as a combination of personal and work related development.



France



Press statements



•90% of the French employees state that an employer has an obligation to support the employee in his/her personal career development.

• More than nine out of ten French employees (91%) want to keep on developing themselves during their career.

•64% of the French employees would change jobs, if they could develop themselves in a faster or better way with another employer.

• Because of more, or different work, during the economic crisis, 31% of the employees state that they developed faster than they normally would have done.

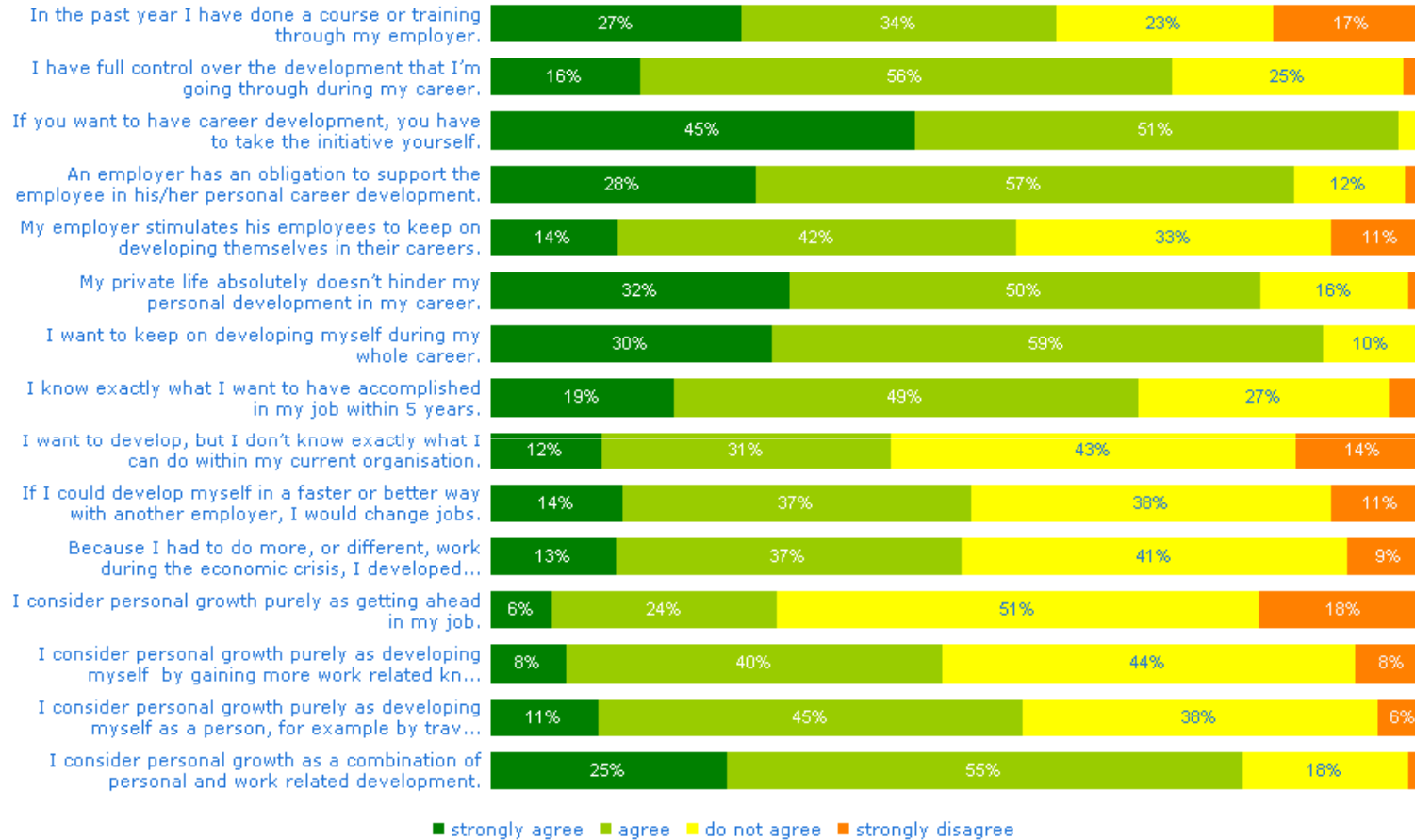
• 89% of the French state that personal growth is mainly a combination of personal and work related development.



Germany



Press statements



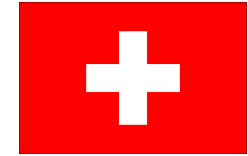
- A striking 96% of the German employees state that they have to take the initiative themselves, if they want to have career developments.

- German employees do not consider personal growth primarily as getting ahead in their jobs (69%), but rather consider personal growth as a person, for example by doing volunteering work or travelling (56%).

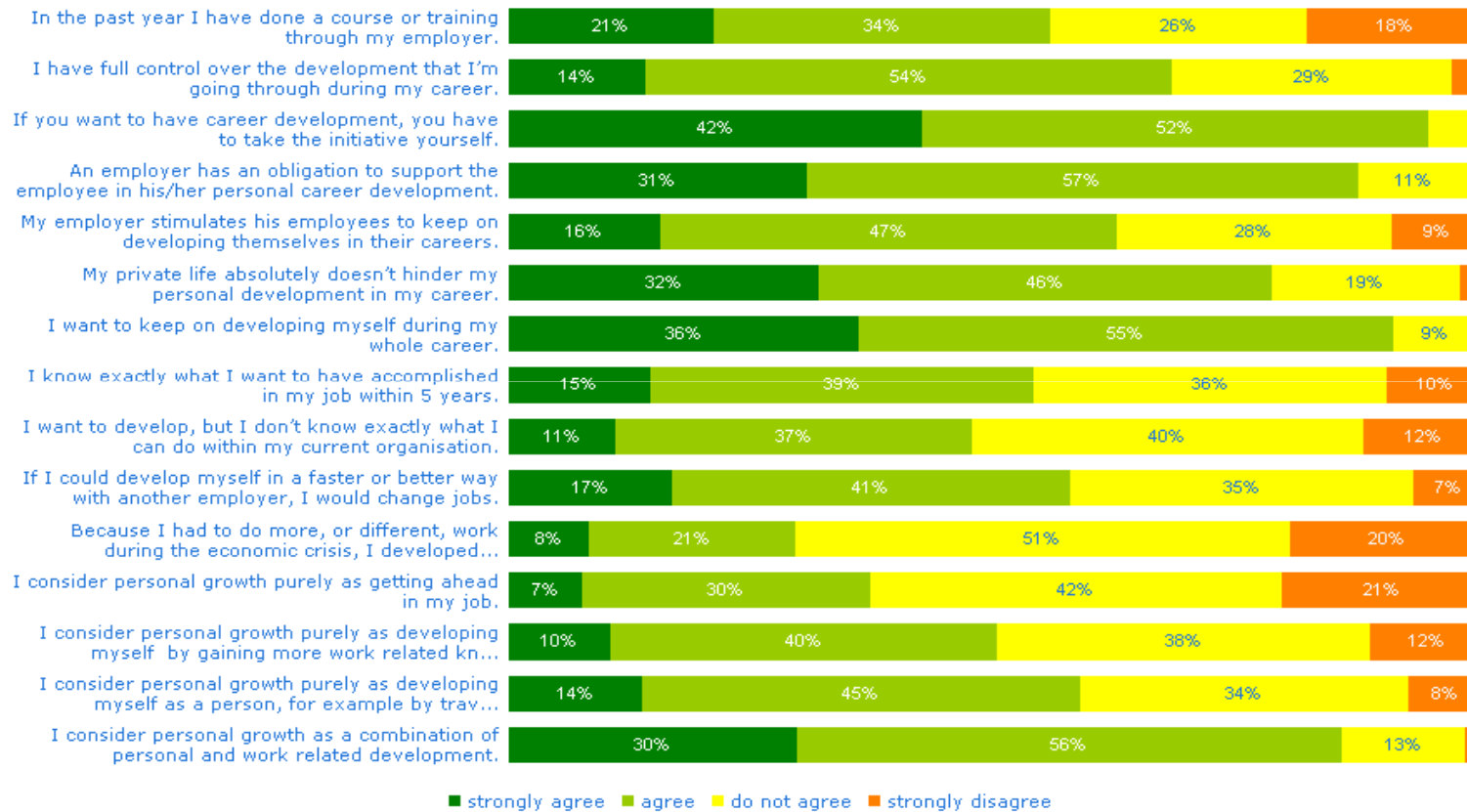
- Most German employees consider personal growth as a combination of personal and work related development. Because of more work during the economic crisis, the employees state that they developed faster than they normally would have done (50%).



Switzerland



Press statements



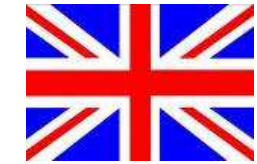
• A prominent 94% of the Swiss employees state that if they want to have a career development, they would have to take the initiative themselves. In addition, these employees want to keep on developing themselves during their whole career (91%).

• About half of the Swiss employees exactly know what they want to have accomplished in their job within 5 years. That is less than in France and Germany.

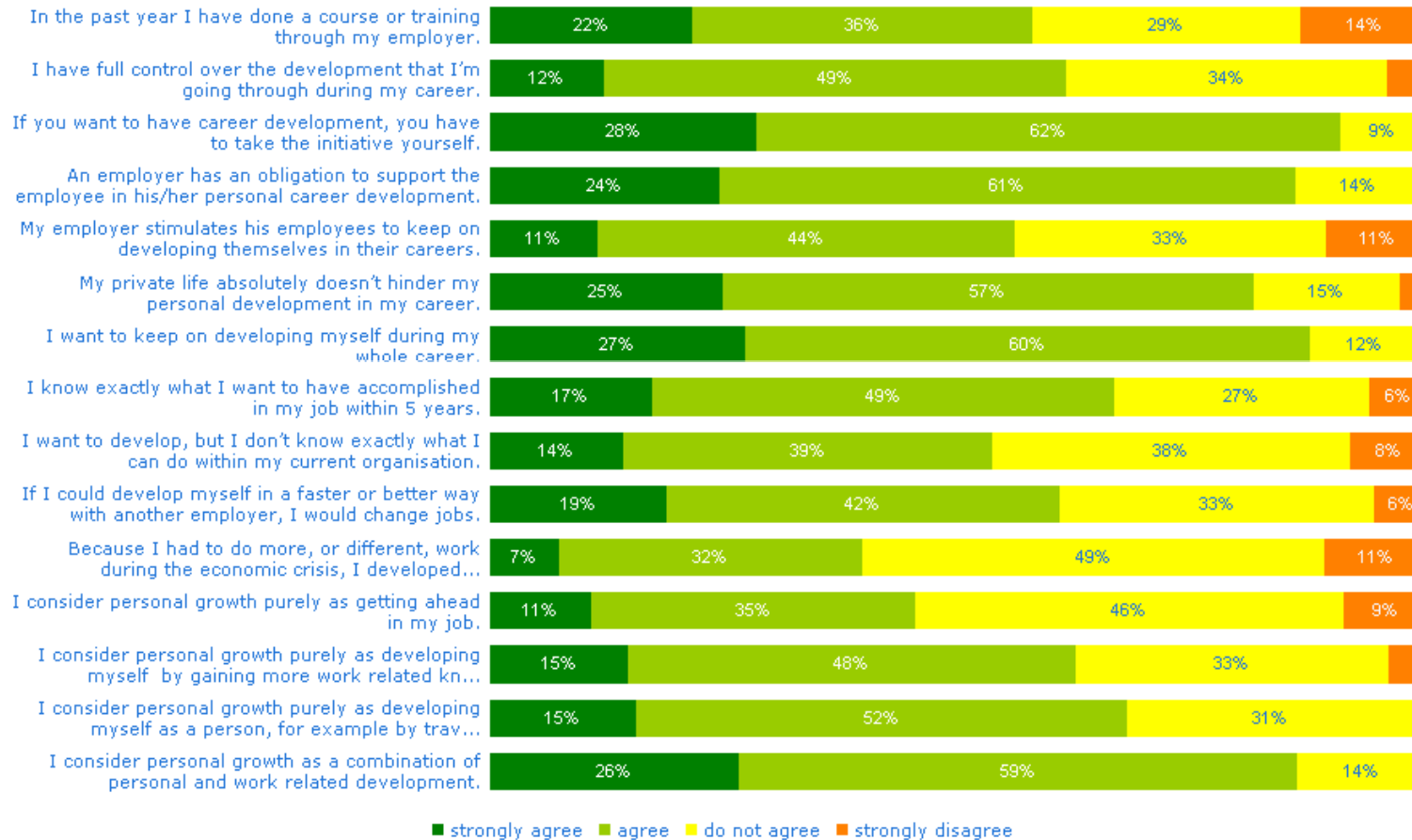
• Just like in most West-European countries, Swiss employees also had to do more, or different, work during the economic crisis. This led to a faster development than it normally would have done (29%).

• Only 14% of the employees in Switzerland do not consider growth as a combination of personal and work related development. This means that the Swiss employees share the same thoughts on this statement as most West-European employees (France 10%, The Netherlands 7%).





Press statements



• Over half of the British employees have done a course or training through their employers (58%). Compared to France (46%) the U.K has significantly more employees who have done a course or training.

• Eight out of ten employees believe that their private life does not hinder their personal development in their careers whatsoever (81%).

• Almost four out of ten British employees state that because of more, or different, work during the economic crisis, they developed faster than they normally would have done.

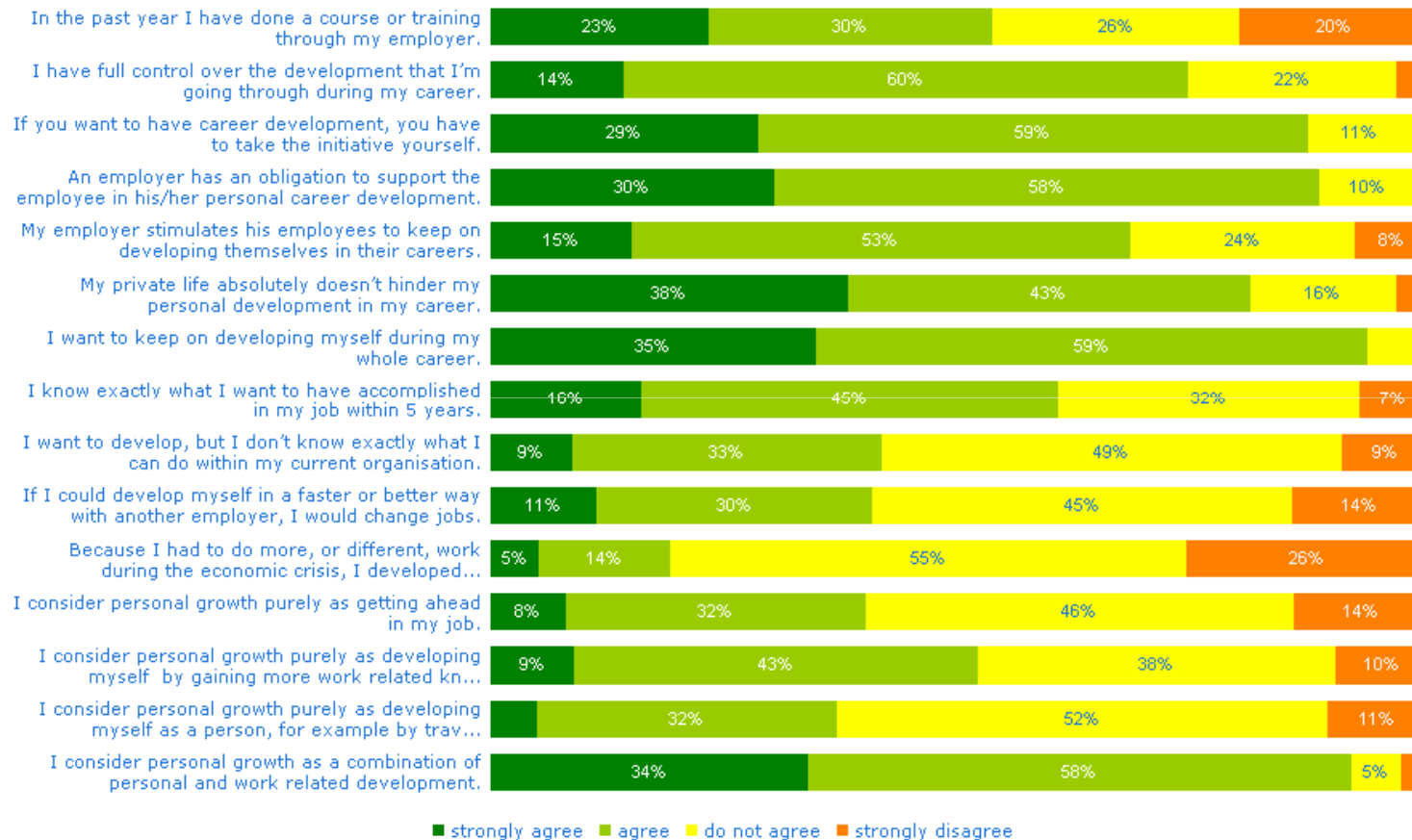
• British employees seem to think of personal growth as a combination of personal and work related development (85%).



Denmark



Press statements



• 74% of the Danish employees have full control over the development that they are going through during their career. In addition, in Denmark 94% of the employees want to keep on developing themselves during their whole career.

• Only 19% of the Danish employees state that working more during the economic crisis led to a faster development of their personal growth. This is approximately the same percentage as in Norway (18%), but significantly less than in Sweden and the U.K.

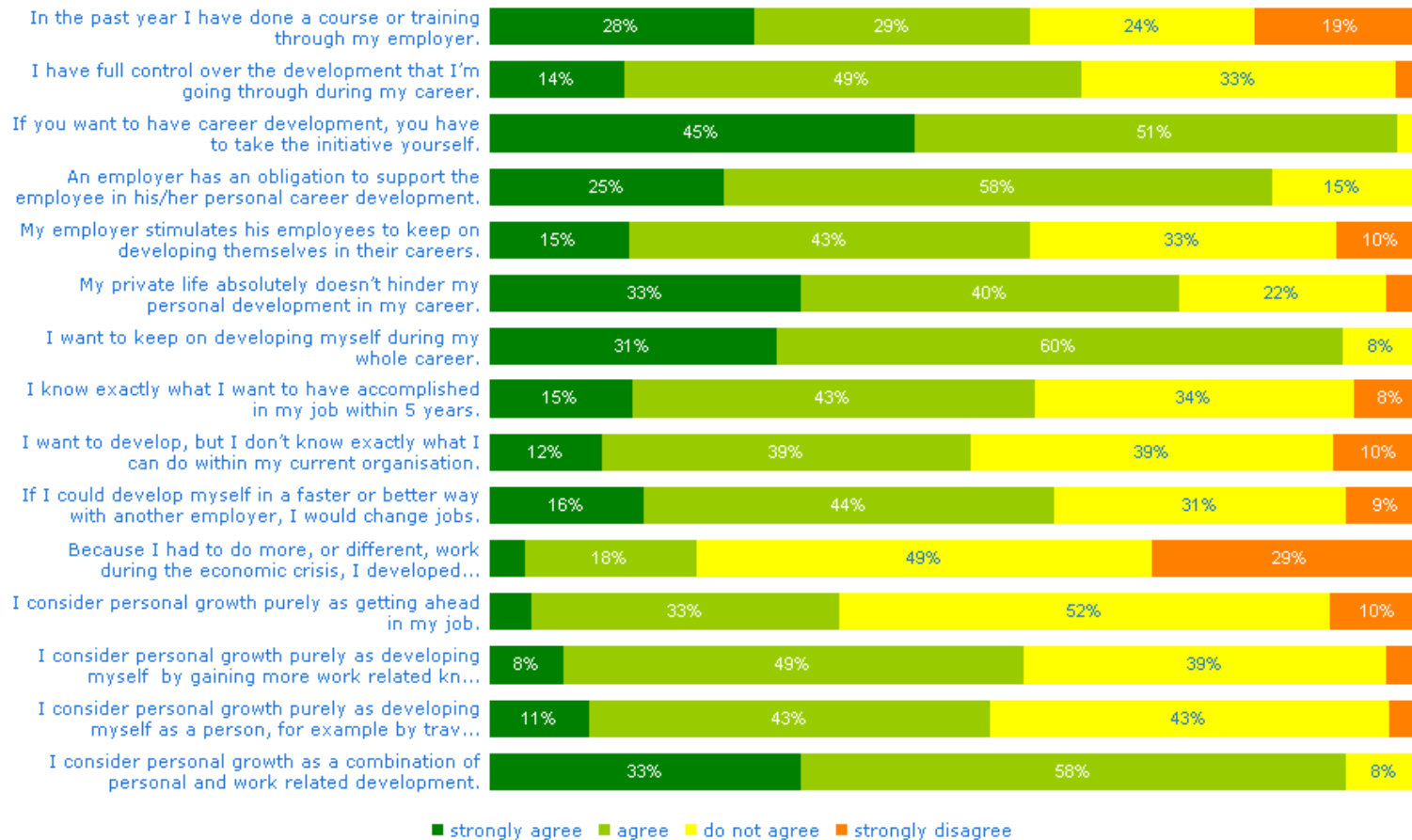
• Almost nine out of ten (92%) Danish employees state that personal growth is a combination of personal and work related development. However, when comparing Denmark to Sweden, Denmark has a significantly higher percentage than Sweden.



Norway



Press statements



- From the Norwegian employees, 96% state that if they want a career development, it is their own initiative to do so. Danish employees do not agree with this statement up to the same level.

- Only 18% of the Norwegian employees state that working more during the economic crisis, has led to a faster development of their growth than they normally would have done. This is less than in Sweden.

- 62% of the Norwegian employees do not consider personal growth primarily as getting ahead in their jobs.

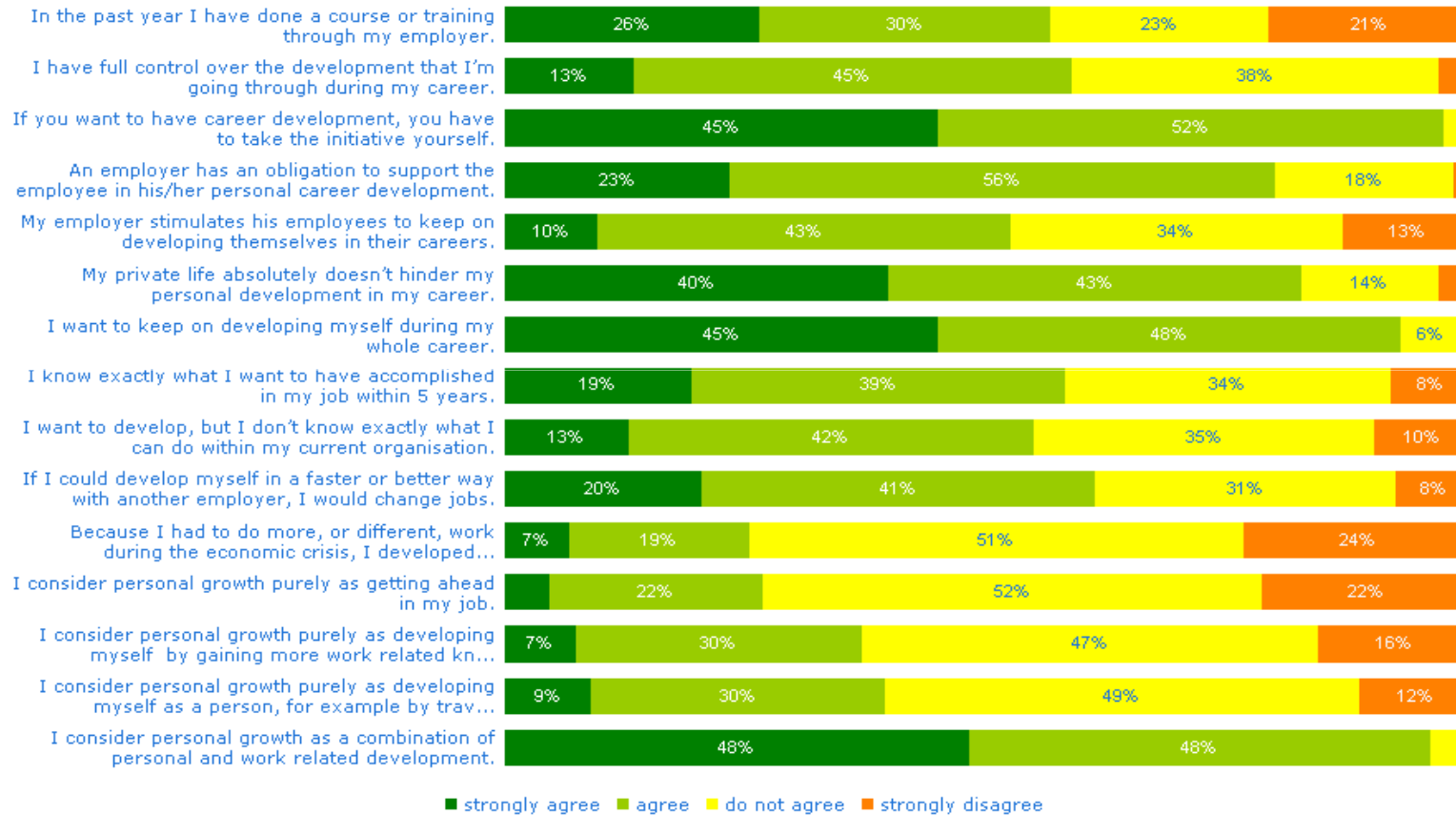
- Most Norwegian employees state that personal growth is a combination of personal and work related development.



Sweden



Press statements



- More than half of the Swedish employees state that their employer stimulates them to keep on developing themselves in their careers (53%).

- From all the employees in Sweden about 58% knows exactly what they want to have accomplished in their job within 5 years.

- 26% of the Swedish employees state that working more, or having different work, during the economic crisis, has led to a faster development of their growth.

- 37% of the Swedish employees consider personal growth primarily as developing themselves by gaining more work related knowledge and skills, whereas 39% of the employees consider this as developing themselves as a person.



Czech Republic



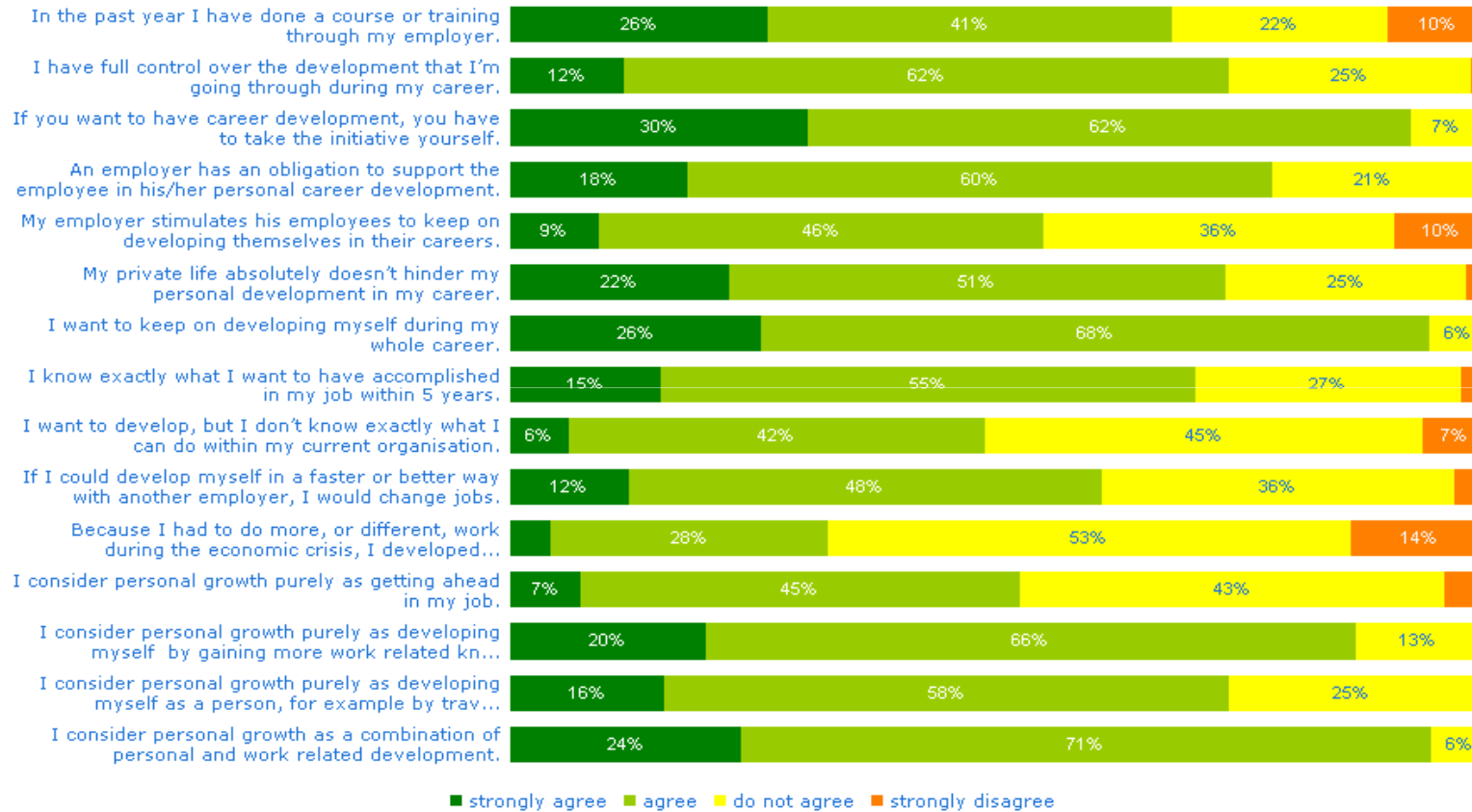
- In the past year 67% of the employees have done a course or training through their employer in the Czech Republic.

- 78% of the Czech employees state their employer has the obligation to support them in their personal career development. This percentage is the same as in Hungary, but less than in Poland. In comparison with Slovakia (88%) there is a significant difference.

- Almost one third of the employees from the Czech Republic say that working more during the economic crisis has led to a faster development than they normally would have done. This differs significantly from Slovakia and Poland.

- Just like their colleagues in for instance Poland and Slovakia, over nine out of ten employees in The Czech Republic consider personal growth as a combination of personal and work related development (95%).

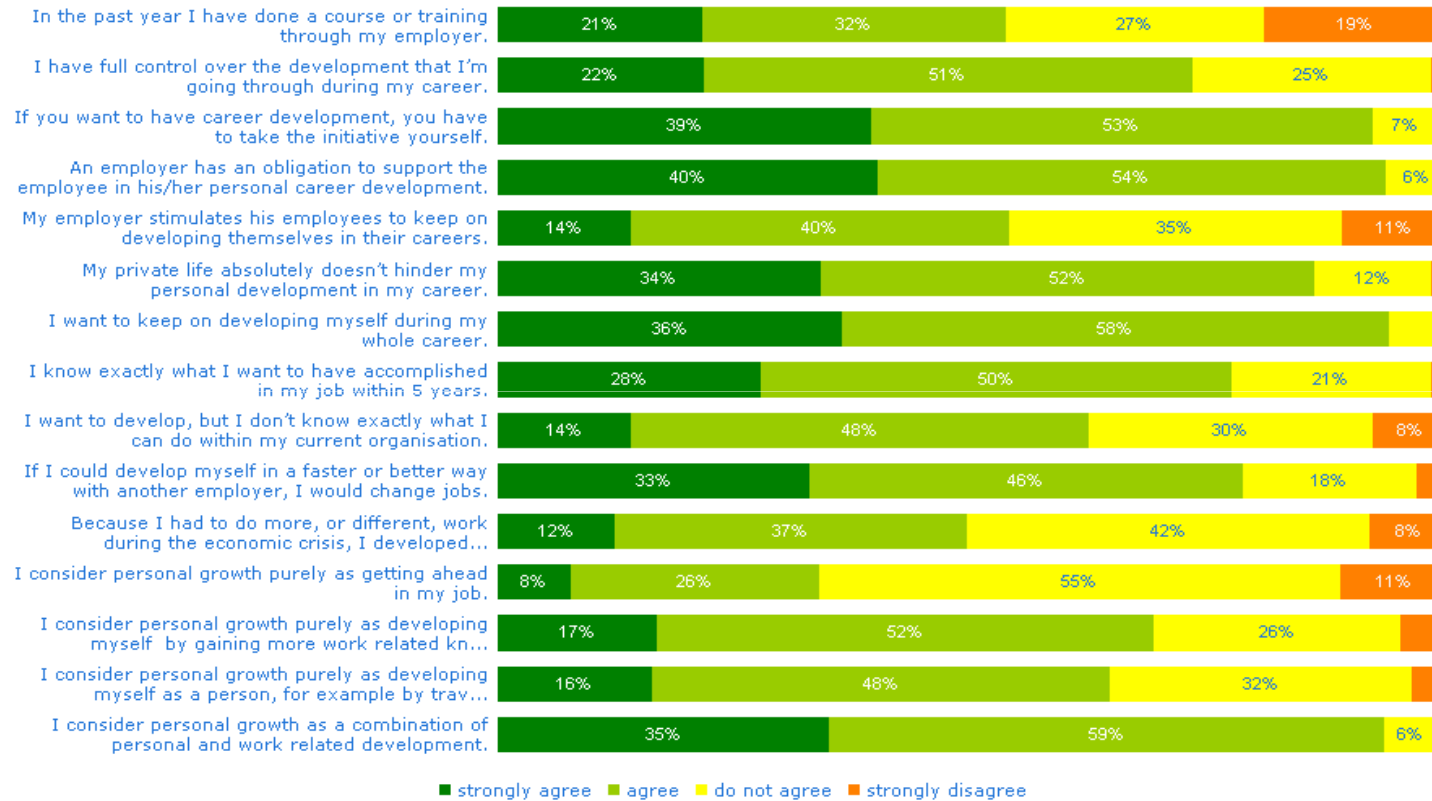
Press statements



Poland



Press statements



- 94% of the Polish employees say their employers have the obligation to support them in their personal career development. Compared to the Czech Republic and Hungary this is rather high.

- 49% of the Polish employees say that working more during the economic crisis has led to a faster development of their personal growth, than it normally would have done. This differs significantly from neighbouring countries, like for instance The Czech Republic and Slovakia.

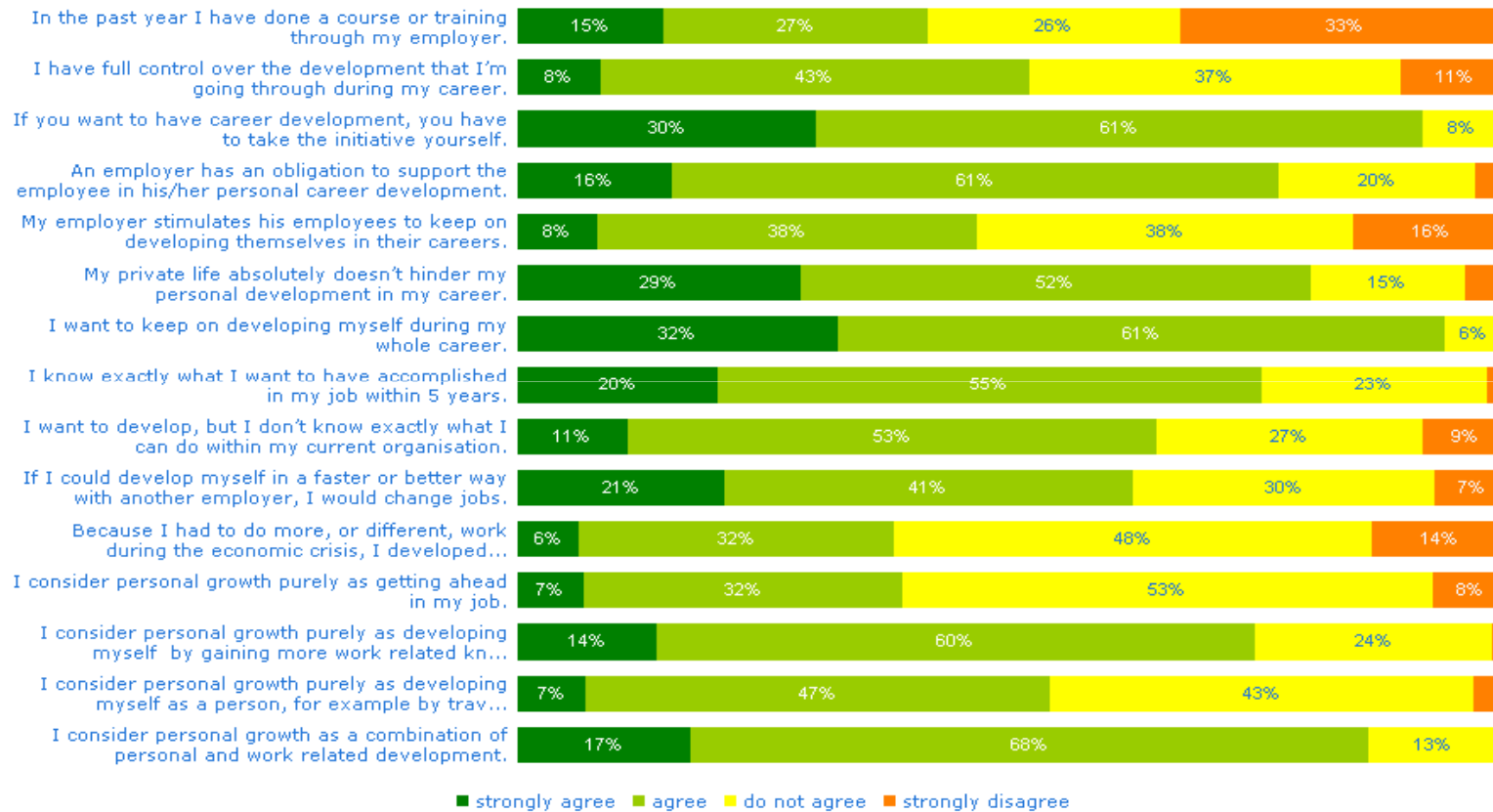
- Just like Slovakian employees, many Polish employees state if they could develop themselves in a faster or better way with another employer, they would change jobs (79%).



Hungary



Press statements



- In the past year over four out of ten Hungarian employees have done a course or training through their employers (42%).

- From the Hungarian employees, 93% wants to keep on developing themselves during their whole career. This is about the same percentage as The Czech Republic is facing (94%).

- Because the employees had to do more, or different, work during the economic crisis, about 38% of the employees developed a faster personal growth.

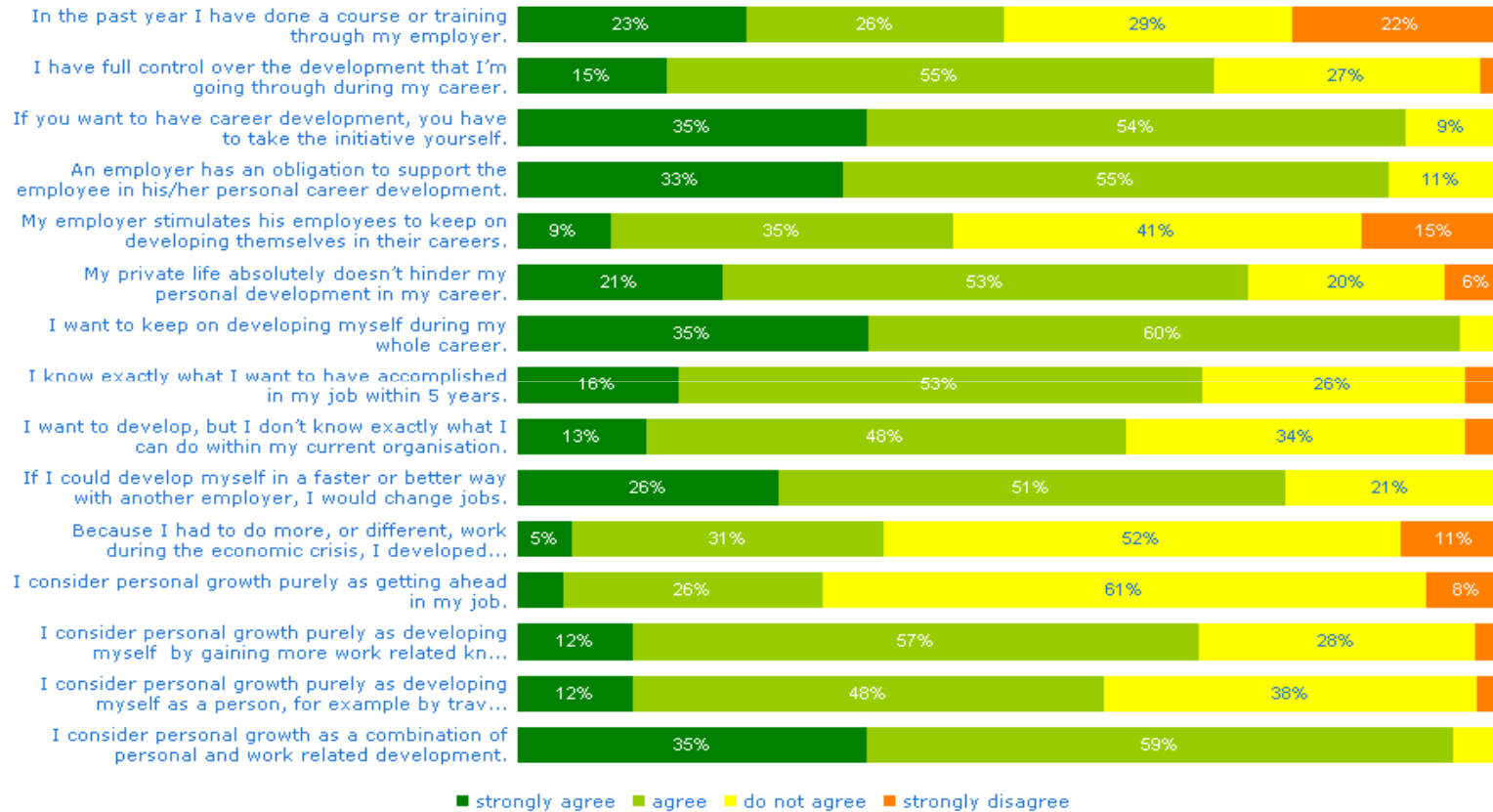
- 74% of the employees in Hungary seem to consider personal growth purely as developing themselves by gaining more work related knowledge and skills.



Slovakia



Press statements



- The Slovakian employees state that their employers do not completely stimulate them to keep on developing themselves in their careers (56%).

- 95% of the Slovakian employees say they want to keep on developing themselves during their whole career.

- About 69% of the Slovakian employees know exactly what they want to have accomplished in their jobs within five years.

- Almost one third of the Slovakian employees state that working more or having a different job during the economic crisis has led to a faster development than it normally would have done (36%).

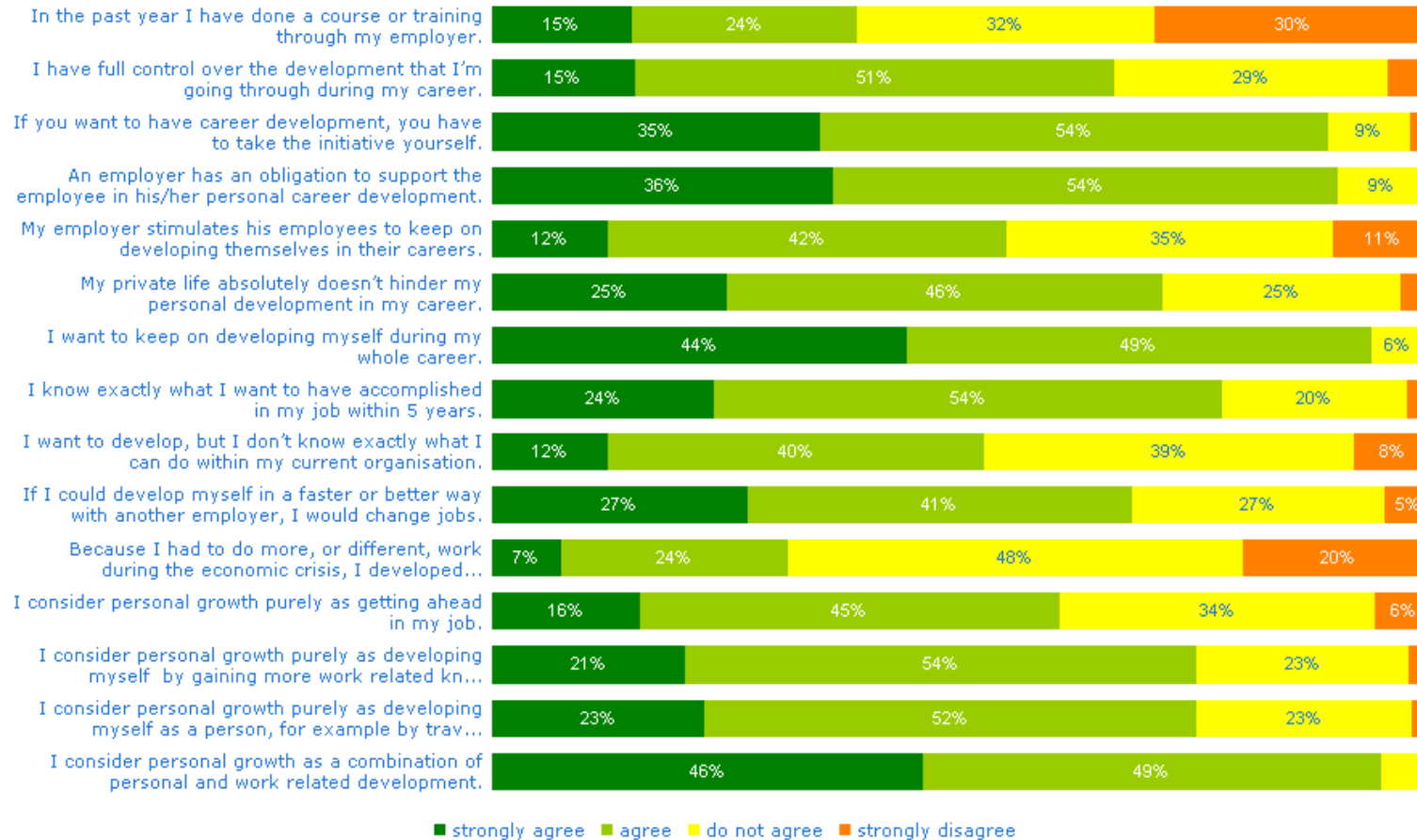
- Only 31% of the Slovakian employees consider personal growth primarily as developing themselves by gaining more work related knowledge and skills.



Greece



Press statements



- If Greek employees want to have a career development, 89% state that they have to take the initiative them self.

- Over 50% of the Greek employees want to develop themselves, but do not know exactly what they can do within their current organization.

- Only 31% of the Greek employees state they have developed faster than they normally would have done, because of more and different work during the economic crisis.

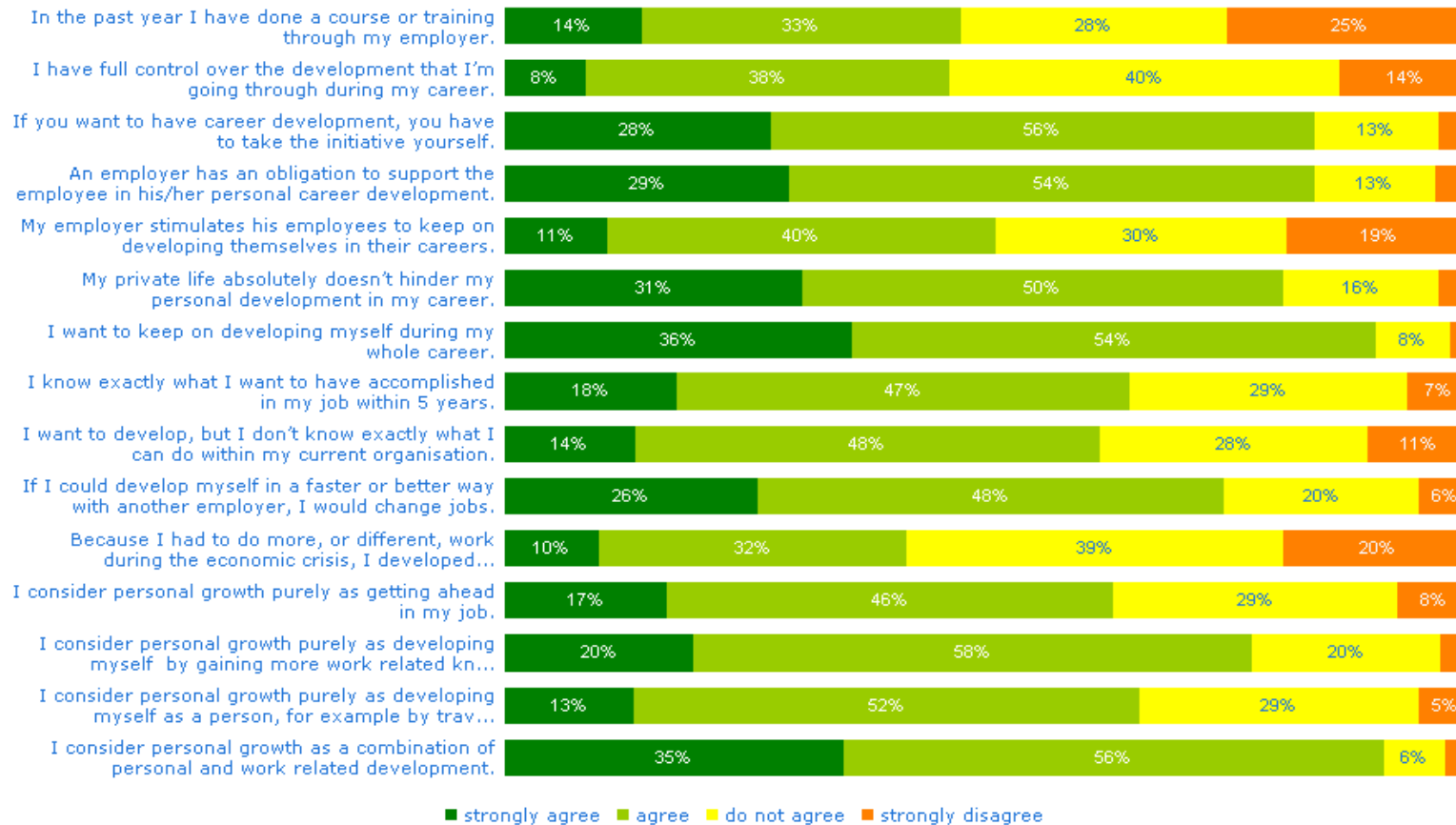
- 95% of the Greek employees state that personal growth is a combination of personal and work related development.



Italy



Press statements



- More than eight out of ten Italian employees state that if they want to have a career development, they have to take the initiative themselves (84%). This is for instance, significantly less than in Spain or Turkey (91%, 92%).

- A high number of Italian employees state that their private life absolutely does not hinder their personal development in their careers (81%).

- Many Italians state that because they had to do more, or different, work during the economic crisis, they have developed faster than they normally would have done (42%).

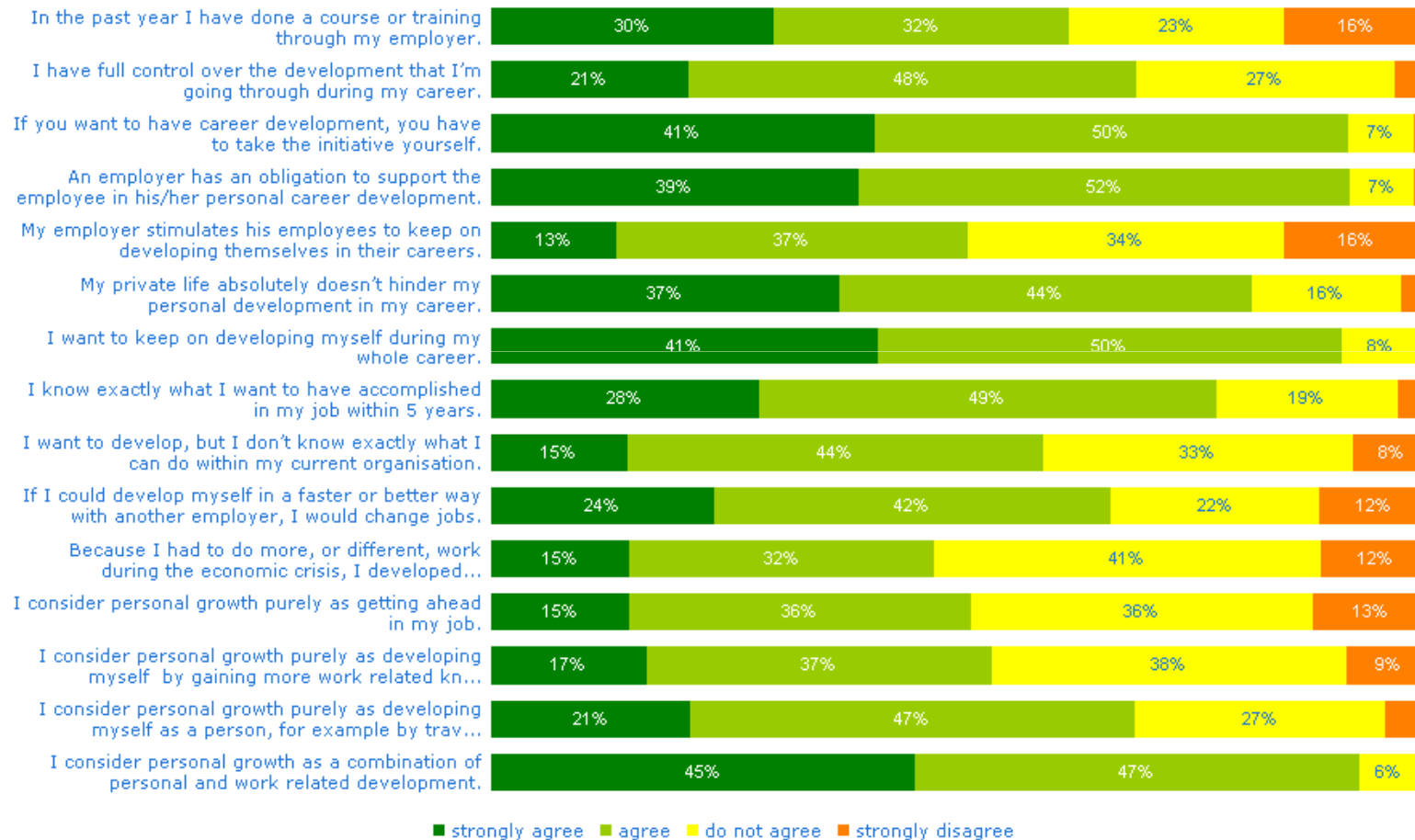
- 91% of the Italian employees consider personal growth as a combination of personal and work related development.



Spain



Press statements



- 62% of the Spanish employees have done a course or training through their employer over the past year.

- According to Spanish employees, they have to take the initiative themselves in order to have a career development (91%).

- From the Spanish employees 81% state that their private lives absolutely do not hinder their personal development in their careers.

- About 47% of the Spanish employees say that because they had to do more, or different, work during the economic crisis, they developed faster than they normally would have done. This is significantly more than in Greece and Italy.

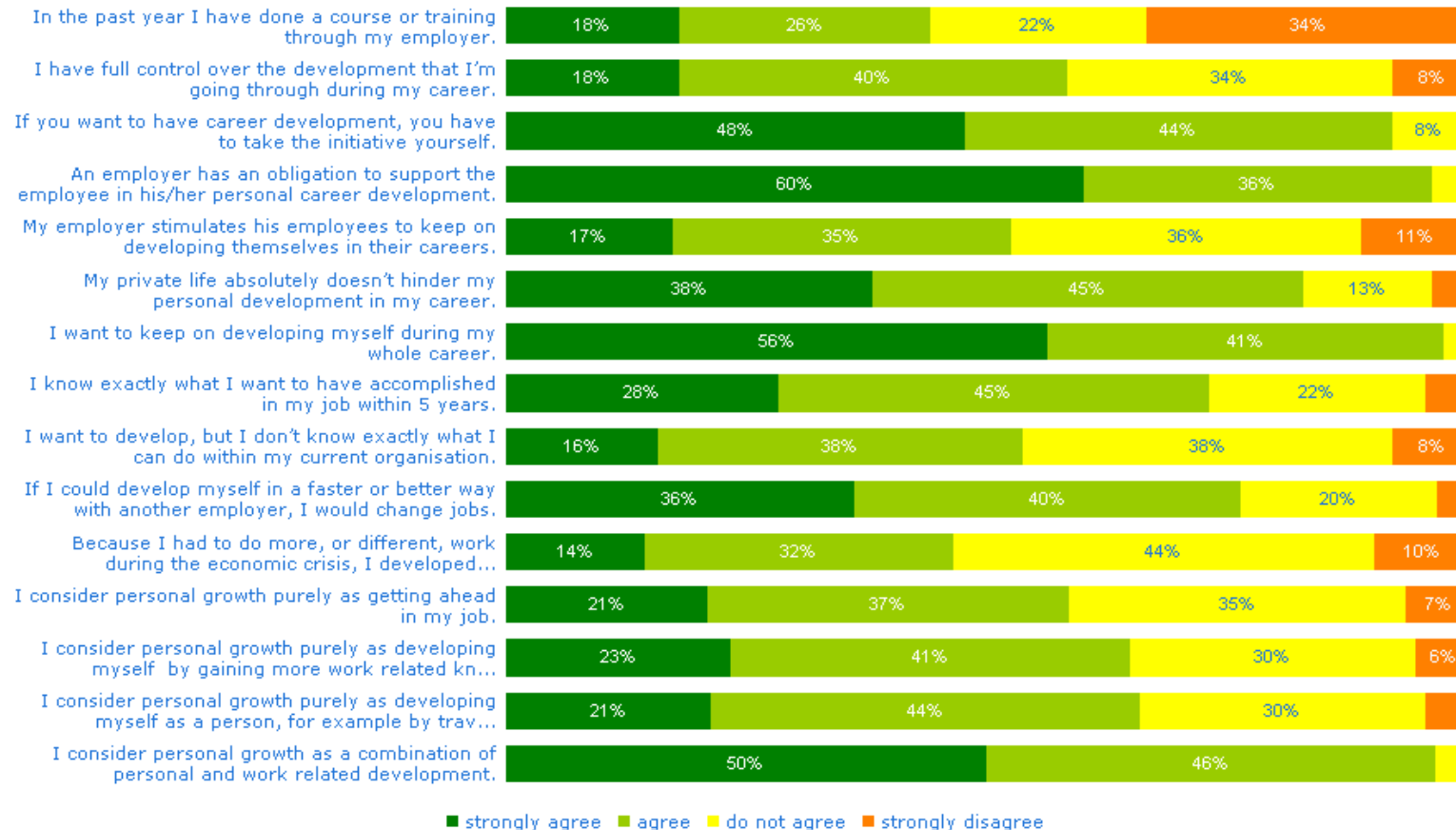
- The Spanish employees consider personal growth mainly as getting ahead in their job and gaining more work related knowledge and skills (51% and 54%). Compared to Italy this percentage is rather low.



Turkey



Press statements



- In the past year 44% of the Turkish employees did a course or training through their employer. This is significantly less than in Spain.

- Many Turkish employees state that if they want to have a career development, they have to take the initiative themselves (92%).

- During the economic crisis many Turkish employees had to do more, or different, work. Because of this, these employees developed faster than they normally would have done (46%).

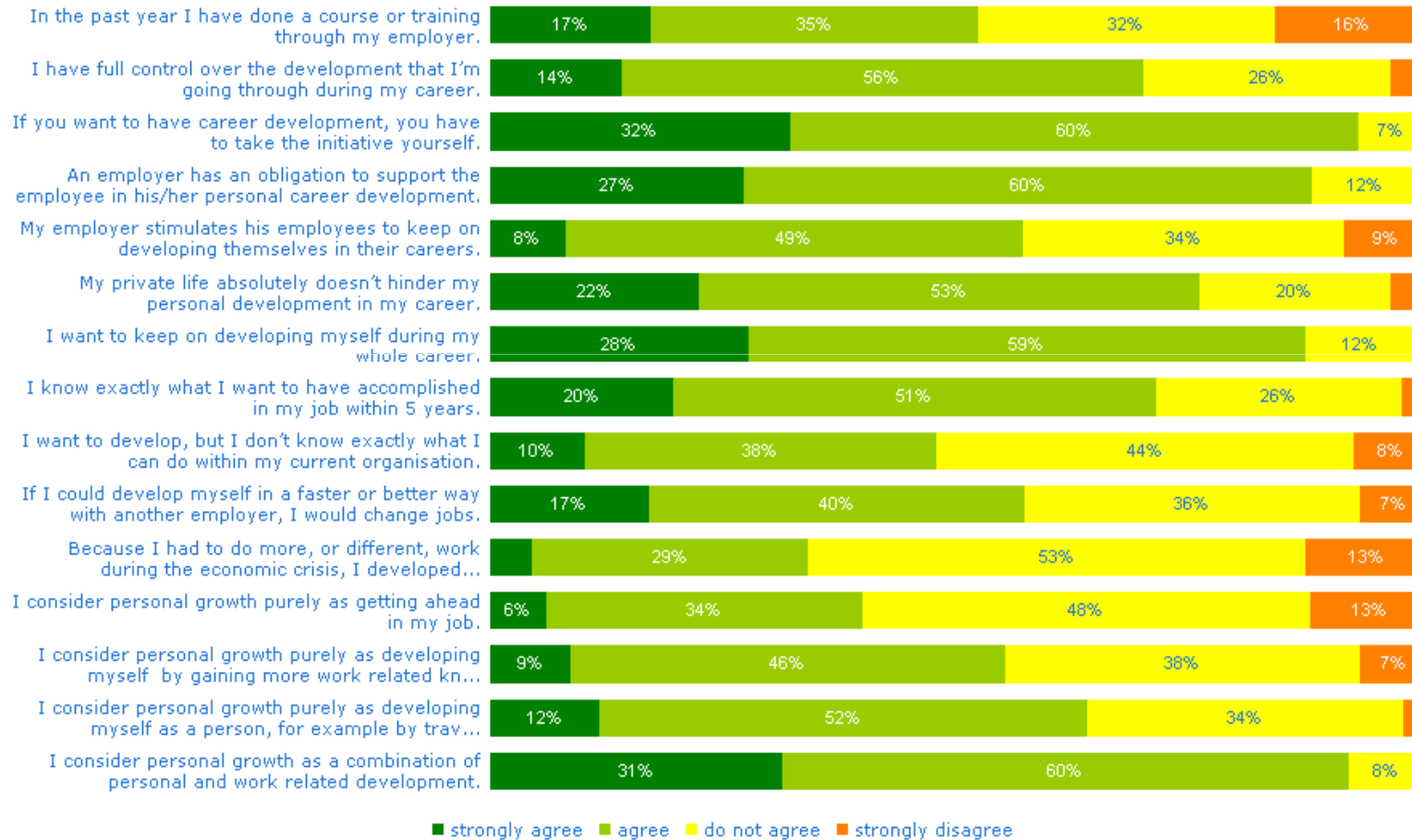
- The Turks consider personal growth as a combination of personal and work related development (96%).



Australia



Press statements



- 52% of the Australian employees in the past year did a course or training through their employer. This is significantly less than in Canada.

- Three out of four Australian employees state that their personal life absolutely does not hinder their personal development in their careers.

- Compared to the United States and Canada, less Australian employees state that during the economic crisis they developed faster than they normally would have done, because they worked more or had different work (34%).

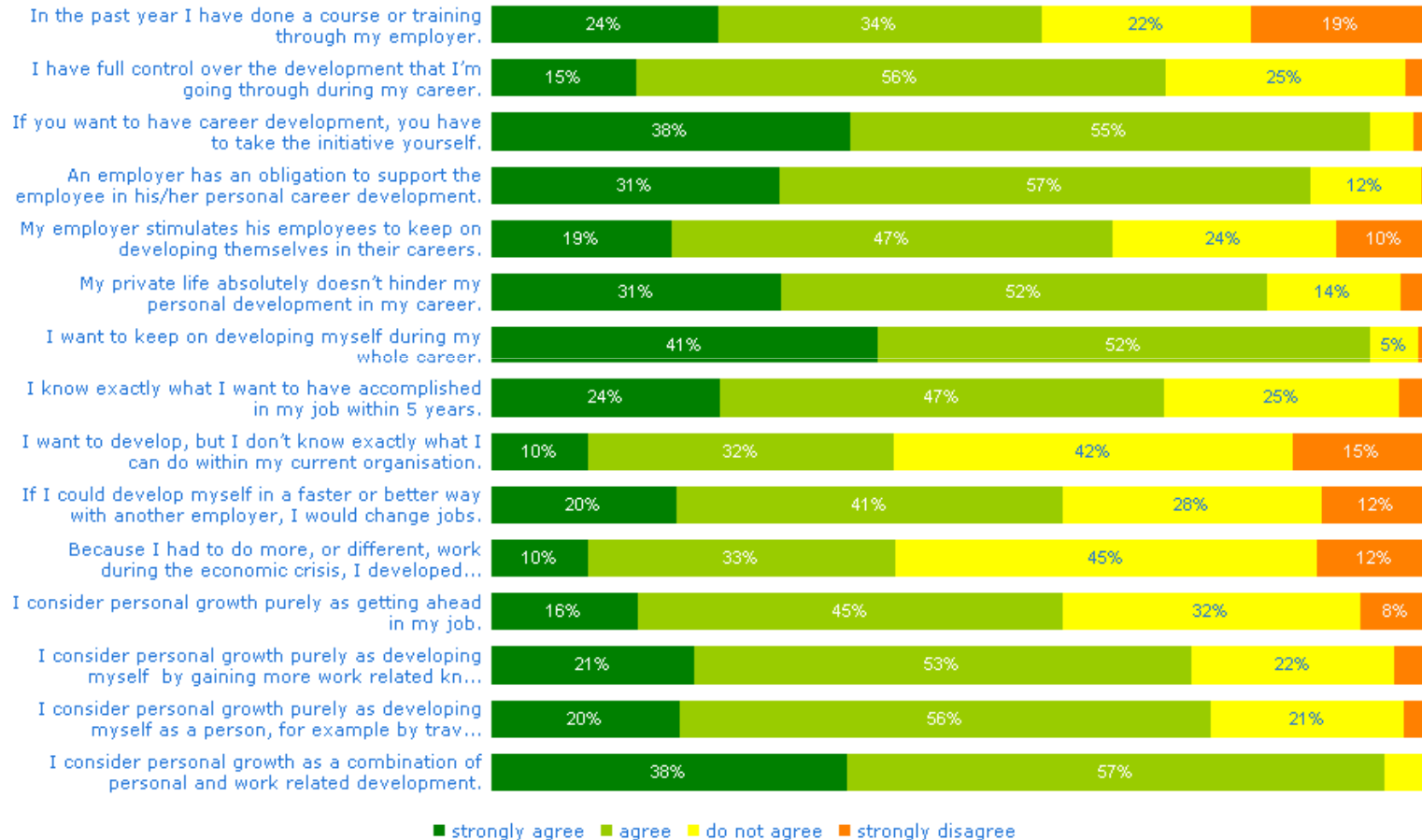
- Less than the American and Canadian employees, Australian workers consider personal growth purely as getting ahead in their job (40%).



Canada



Press statements



- Almost six out of ten Canadian employees did a course or training through their employers (58 %).

- About 71% of the employees in Canada have full control over the development that they are going through during their career.

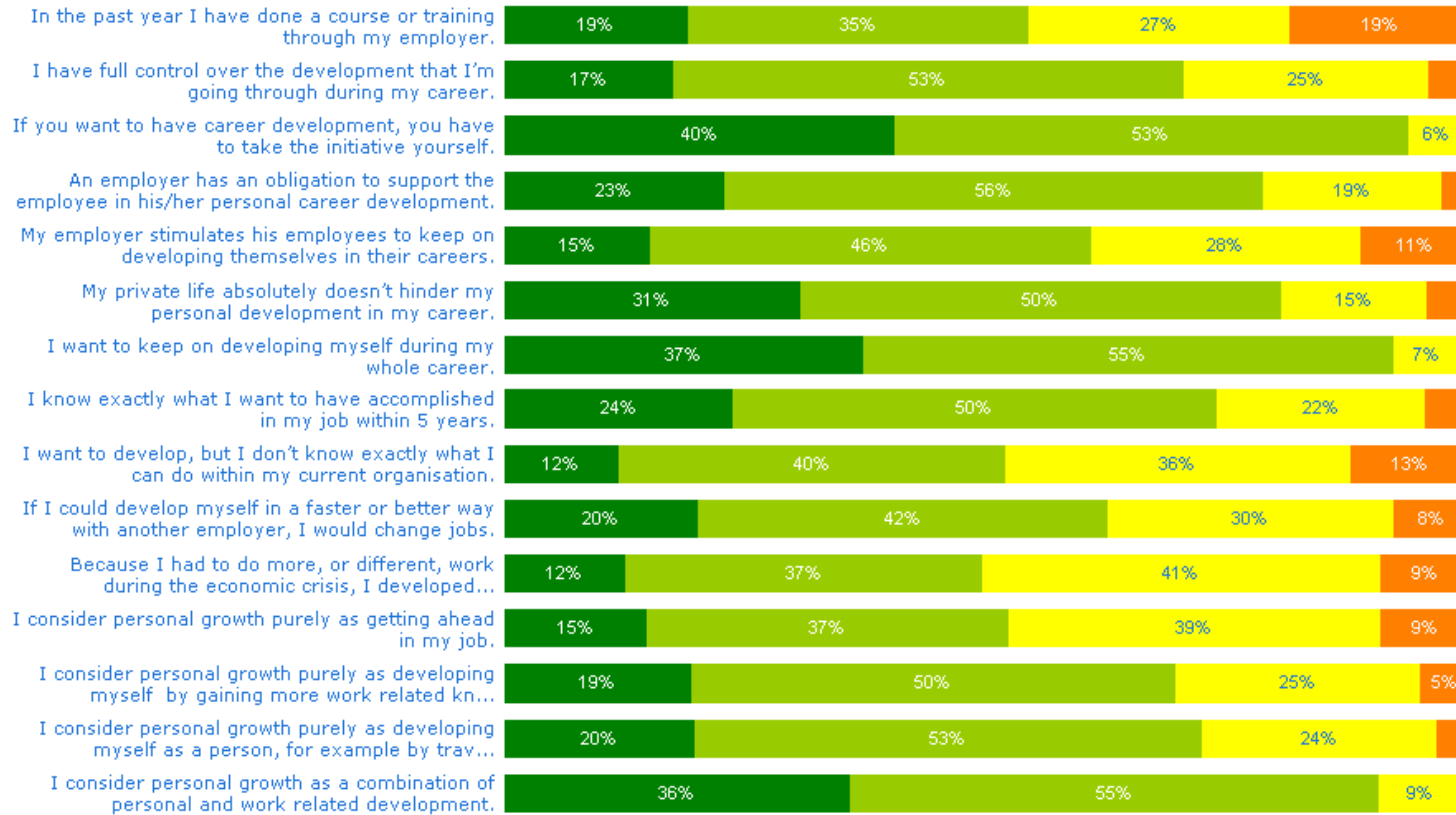
- A vast majority of 83% thinks that their private life does not hinder their personal development in their career.

- More than Australian employees, Canadians state that working more during the economic crisis had led to a faster development than they normally would have had (43%).





Press statements



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

- Almost 54% of the American employees did a course or training through their employer this past year.

- American employees think that their private lives do not hinder their personal development in their careers (81%).

- 49% of the American employees think because they have done more, or different, work during the economic crisis, they have grown faster than they normally would have done. This rate is significantly higher than it is in Australia and Canada.

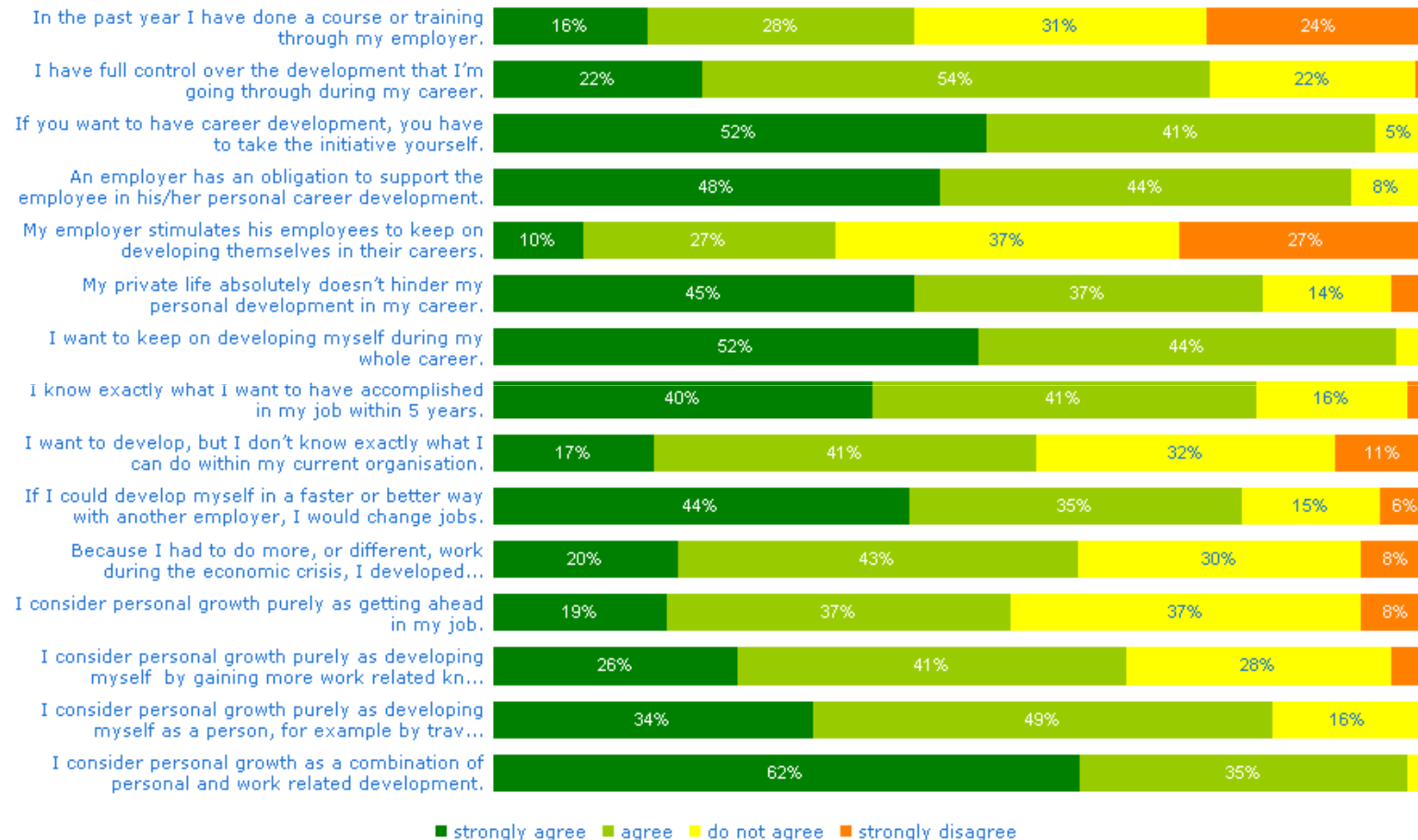
- 91% of the employees in the U.S. think of personal growth as a combination of personal and work related development.



Argentina



Press statements



- The Argentinean employees would change jobs if they could develop themselves in a faster or better way with another employer (79%). This is, for example, significantly higher than it is in the U.S.

- Compared to Mexico (54%) only few (37%) Argentinean employees state that their employers stimulates them to keep on developing themselves in their careers.

- In Argentina 63% of the employees state that they have developed faster than they normally would have done, because they had to do more, or different work, during the economic crisis.

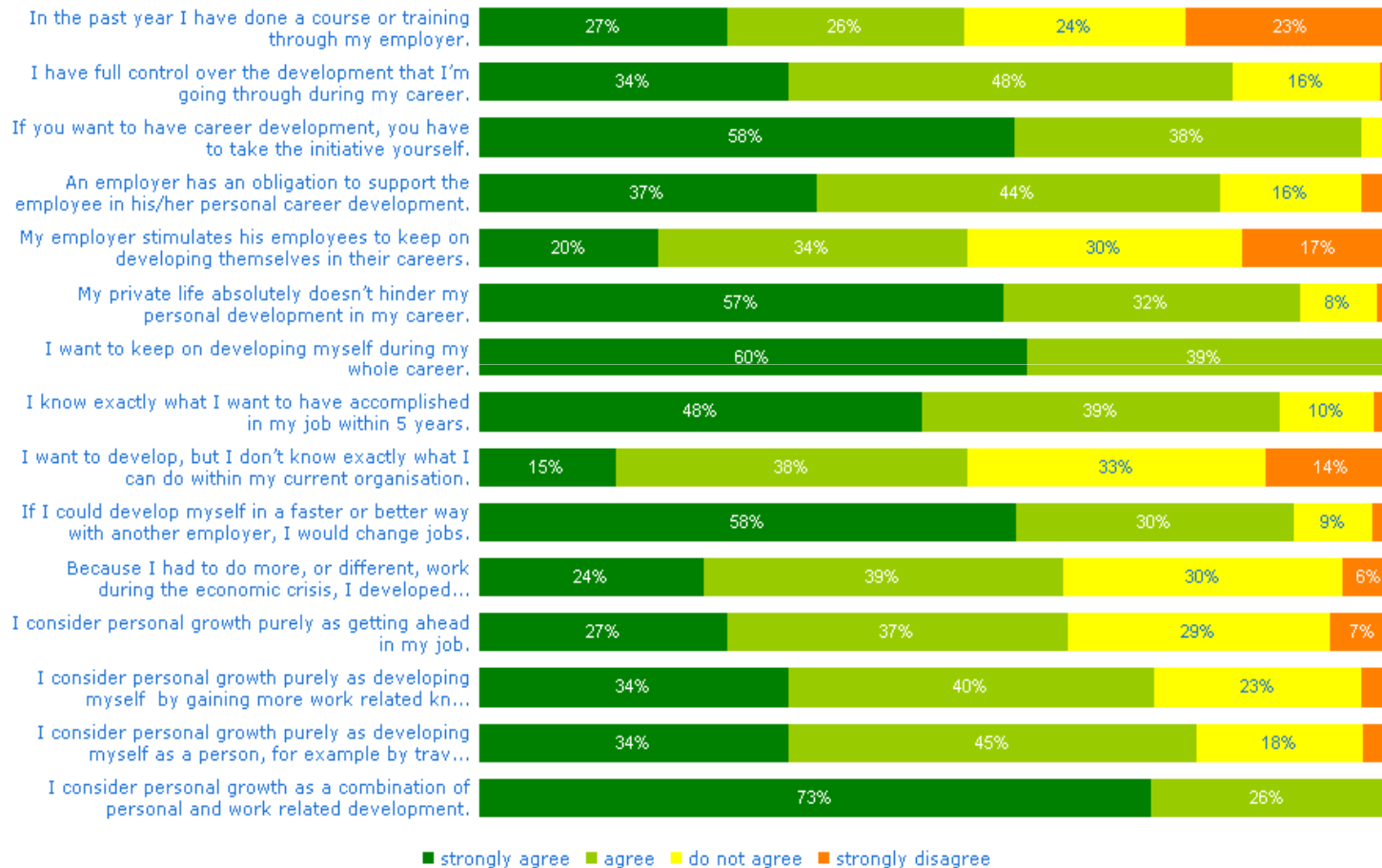
- In Argentina employees consider personal development primarily as a combination of personal and work related development (97%).



Mexico



Press statements



- Compared to the Argentinian employees, over 50% of the Mexican employees state that their employers stimulate them to keep on developing themselves in their careers.

- About nine out of ten Mexican employees would change jobs, if they could develop themselves faster or in a better way with another employer (88%).

- Just like in Argentina, 63% of the Mexican employees state that they have developed faster than they normally would have done, because they had to do more, or different work, during the economic crisis.

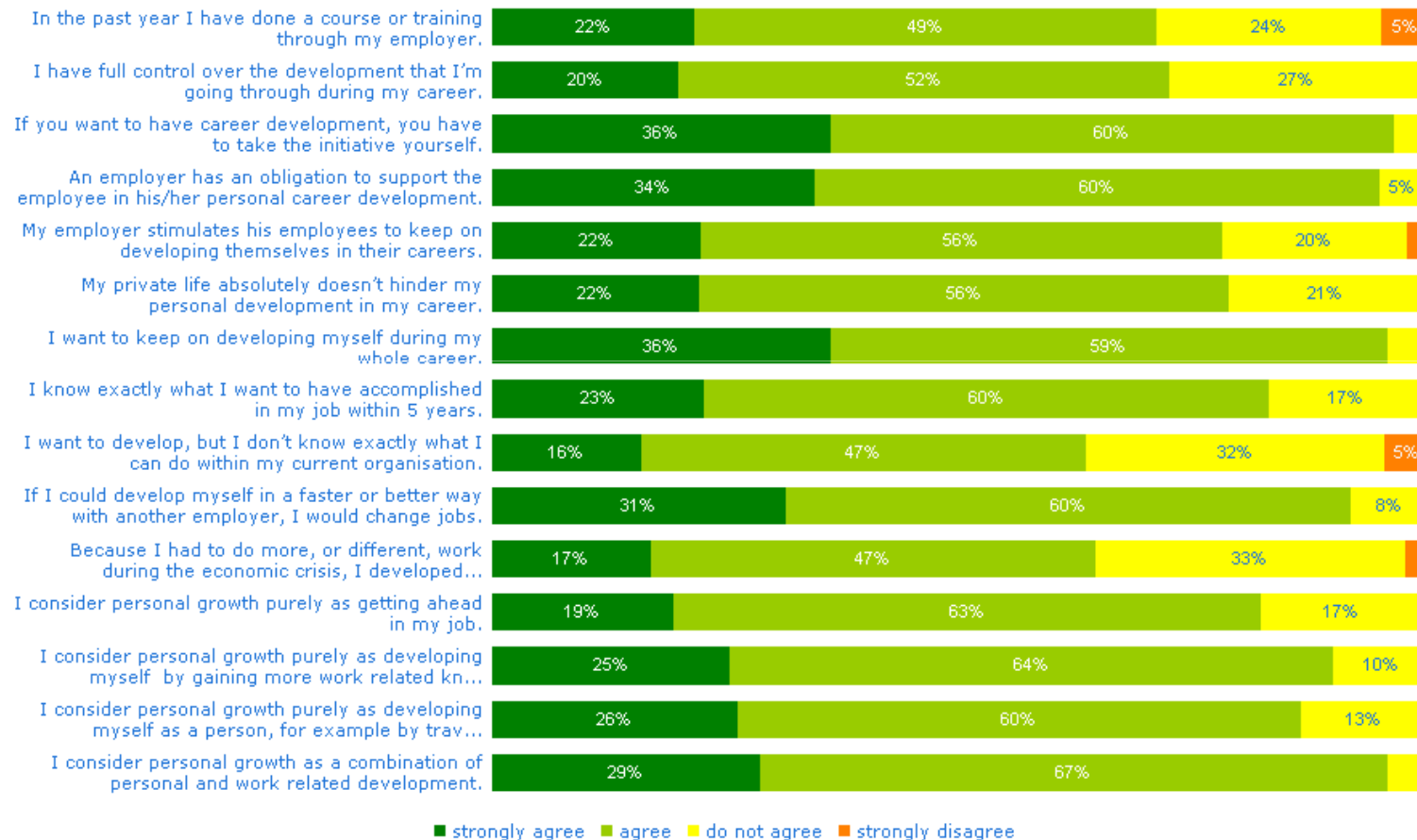
- Mexico is the only country where 99% of the employees consider personal growth as a combination of personal and work related development.



China



Press statements



• From all the Chinese employees, approximately 94% state that their employer has the obligation to support them in their personal career development. This number is significantly higher than in Japan.

• A vast majority of 91% also state that they would change jobs, if they could increase their personal development with another employer.

• Almost 64% of the Chinese employees believe that they developed faster than they normally would have done, because they did more, or different, work during the economic crisis.

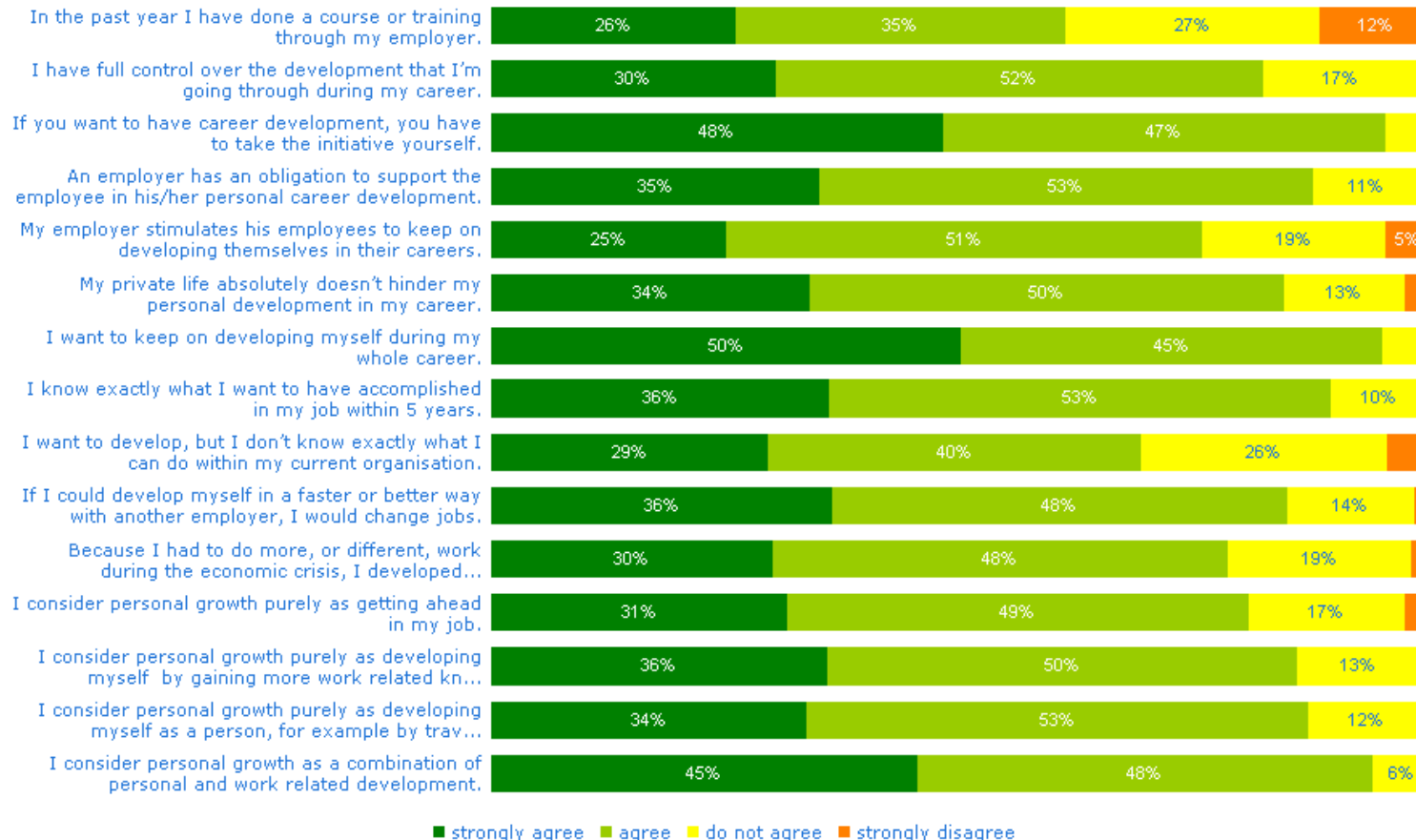
• 82% of the Chinese employees define personal growth purely as getting ahead in their jobs.



India



Press statements



- 88% also feel that the employers have the obligation to support them in their personal career development.

- If the employers in India do not stimulate them, 84% of the Indian employees would change jobs if they could develop themselves in a faster or better way with another employer. This is significantly lower than in China, but significantly higher than in Japan.

- This could be explained by the high percentage (80%) of Indian employees who define personal growth purely as getting ahead in their jobs.

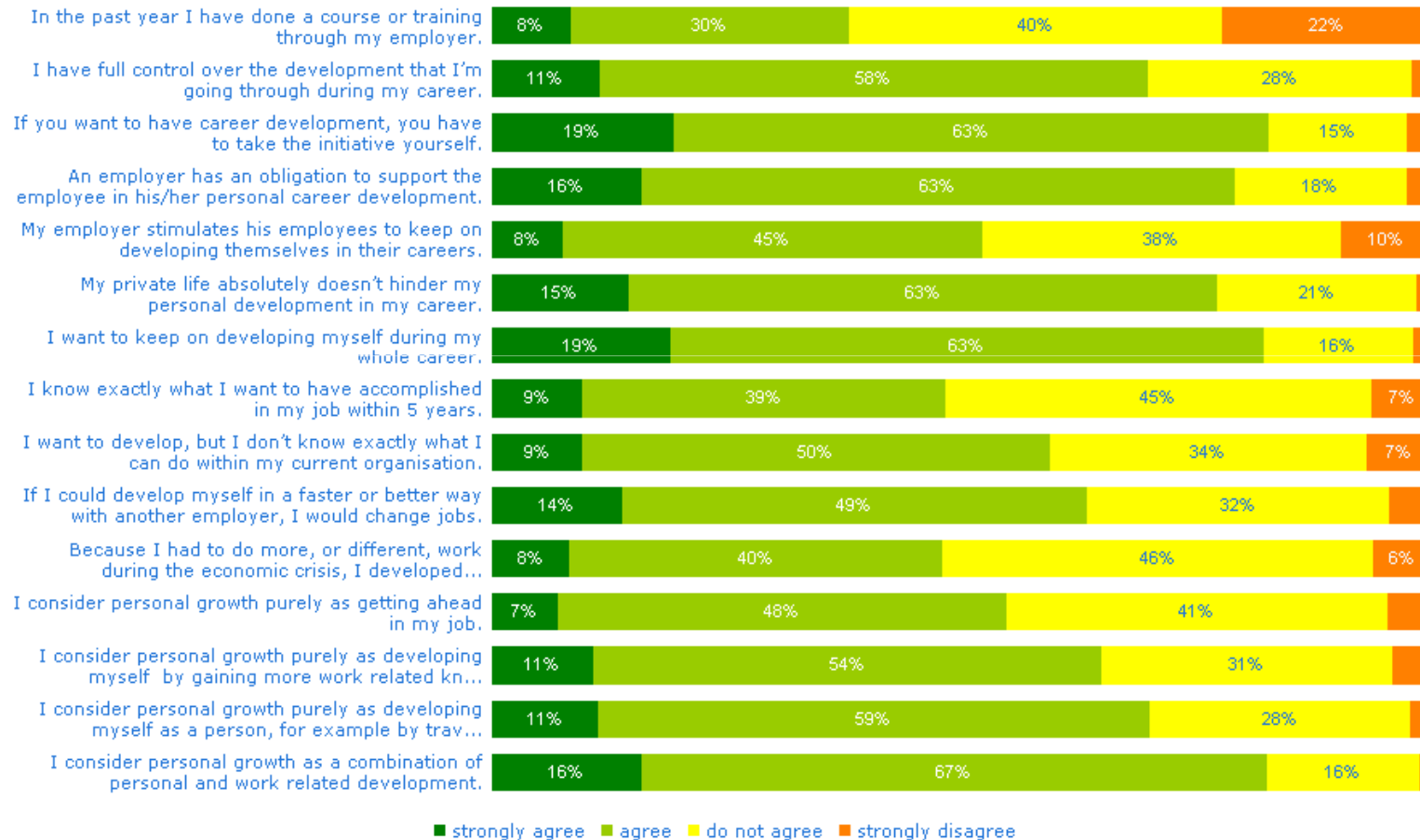
- A vast majority of 78% of the Indian employees state that the economic crisis has led to a faster development than it normally would have done, due to more and different work. This is significantly higher than in China and Japan.



Japan



Press statements



•Over half of the employees (53%) believe that their employers stimulate them to keep on developing themselves in their careers. However, China and India have significantly more employees who agree on this statement.

• 63% of the Japanese employees would change their jobs, if they could develop themselves in a faster or better way with another employer. This is less than in India and China respectively, 84% and 91%.

• In Japan 48% of the employees state that they have developed faster than they normally would have done, because they had to do more, or different work, during the economic crisis. This is significantly less than China and India.

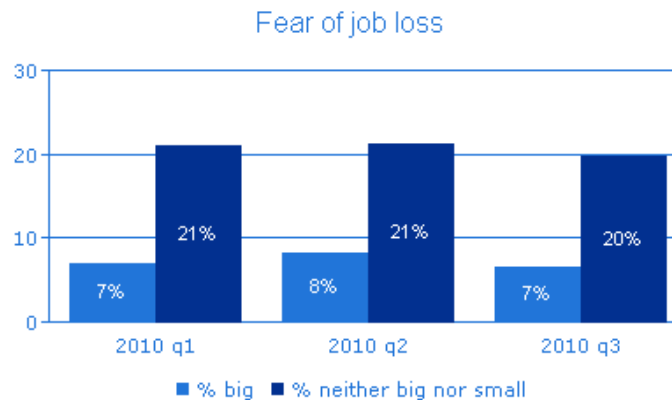
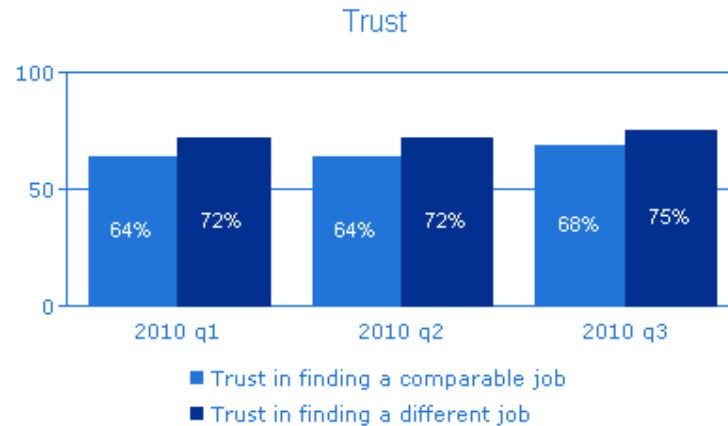
• Only 55% of the Japanese employees define personal growth mainly as getting ahead in their jobs. That is significantly less than in India (80%) and China (82%).



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- chapter 3: satisfaction
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Confidence in finding a new job is positively increasing worldwide.



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

| Changes | ↑ | ↓ |
|-------------|----------------|---|
| Canada | * 10% | |
| France | *8% | |
| Germany | * 12% **10% | |
| Netherlands | * 8% | |
| India | * 7% **11% | |
| Spain | **11% | |
| Sweden | **9% | |
| Switzerland | *11% | |
| Hungary | *7% | |
| Japan | **7% | |

•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?

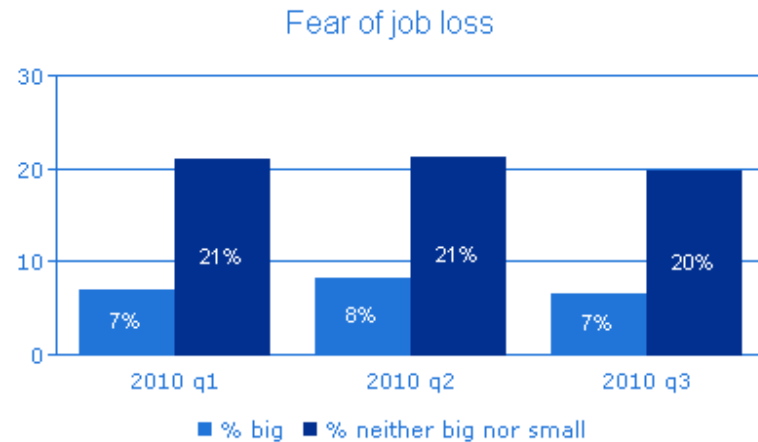
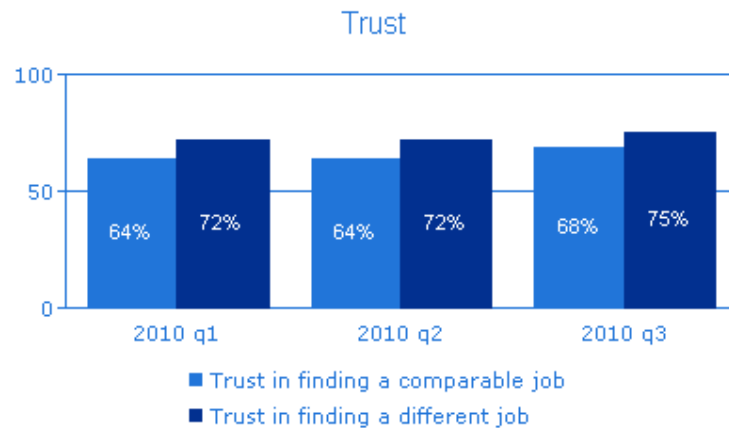
•And do you think you could get other work with a different employer between now and 6 months?

•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?

| Changes | ↑ | ↓ |
|---------|---|----------------|
| India | | *12% ** 14% |
| Germany | | **8% |
| Greece | | *7% |

Confidence in finding a new job has changed positively worldwide. In India the number of employees that think they will lose their job has decreased the most.



The level of confidence that employees have in finding a new job has changed positively in the last three months.

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

Within Europe, German employees have increased their trust in finding a new job within six months the most. Three months ago 50% of the German employees thought they could find a comparable job within 6 months, this number had increased to 61%. Also in Spain and Switzerland the confidence in finding a new job has increased with more than 10%.

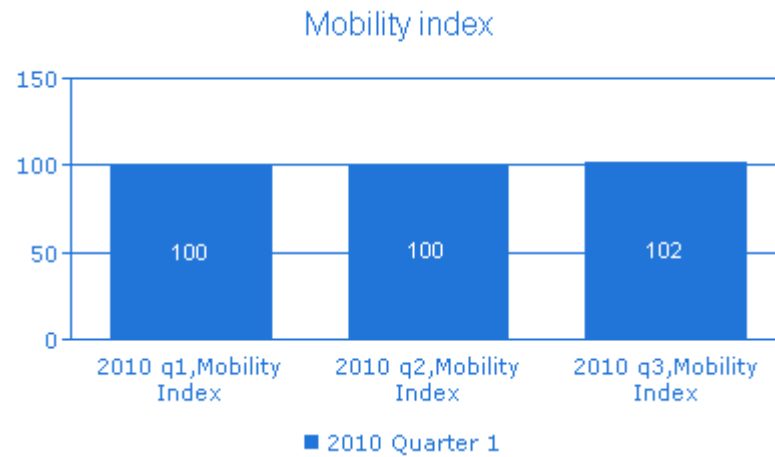
Of all Asian employees, the Chinese employees have the most confidence in finding a different job, namely 86%. They also have more confidence in finding a comparable job than other Asian employees (92%). The confidence in finding a new job has increased the most in India, 85% of the Indian employees think they will find a new job within 6 months.

Employees from Australia, Canada and Mexico also have great confidence in finding a different job (86%, 88%, 90%). Employees from the US have less confidence in finding a new job (70%) compared to employees from neighbour countries.

Norway has still only few employees who think there is a big chance that they will lose their job in the next six months (3,4%). Norway shares this lowest chance estimate with neighbour Sweden and with Luxembourg and Argentina.



Mobility has positively increased in a few countries.



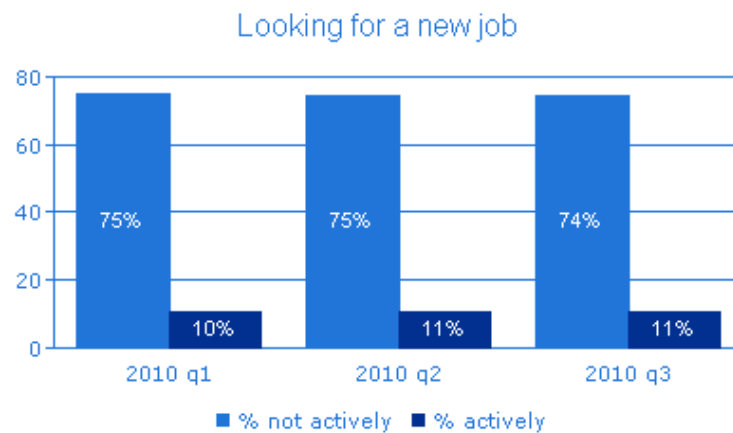
| Changes | ↑ | ↓ |
|---------|---|----|
| Japan | 8 | |
| Sweden | 7 | |
| Turkey | 6 | |
| India | | -7 |

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?

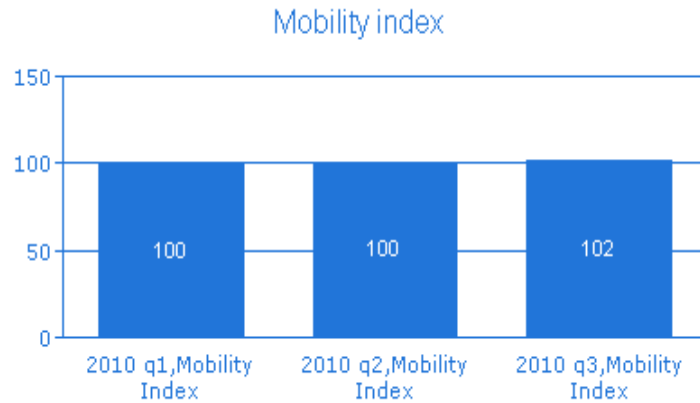


Question:

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



Employee Mobility has increased significantly in a few countries worldwide. The number of employees looking for a new job remained the same over the past three months.

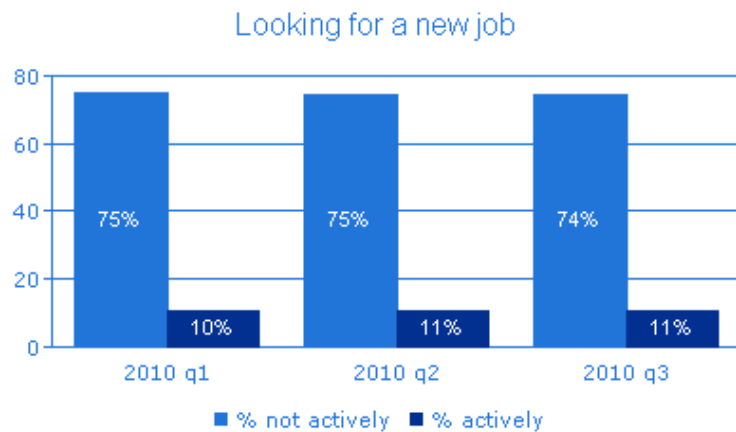


Employee Mobility worldwide has increased in a few countries. In Japan, Sweden and Turkey the expectation of employees to change jobs within the next 6 months increased with 6 or more points. In Spain and Switzerland the Mobility increased with 5 points.

Especially young people expect to change jobs more often within six months. For employees aged 18-24, the mobility index worldwide in the second quarter of 2010 was 114 and increased to 116 in Q3. Nevertheless, in India the mobility-index in this category has declined from 148 to 133 points. In Greece too, the mobility-index is much lower than three months ago for younger employees (from 124 to 103).

In France the mobility-index under young employees has increased significantly over the past three months. The overall mobility-index for older employees declining over the past three months in France. The strongest increase in France is among employees between 25 and 34 years old.

Indian employees have less fear in losing their jobs than three months ago (from 26% to 14%). This had lead to a smaller employee mobility in India (from 147 to 140). These employees are probably less likely to look actively for a new job.

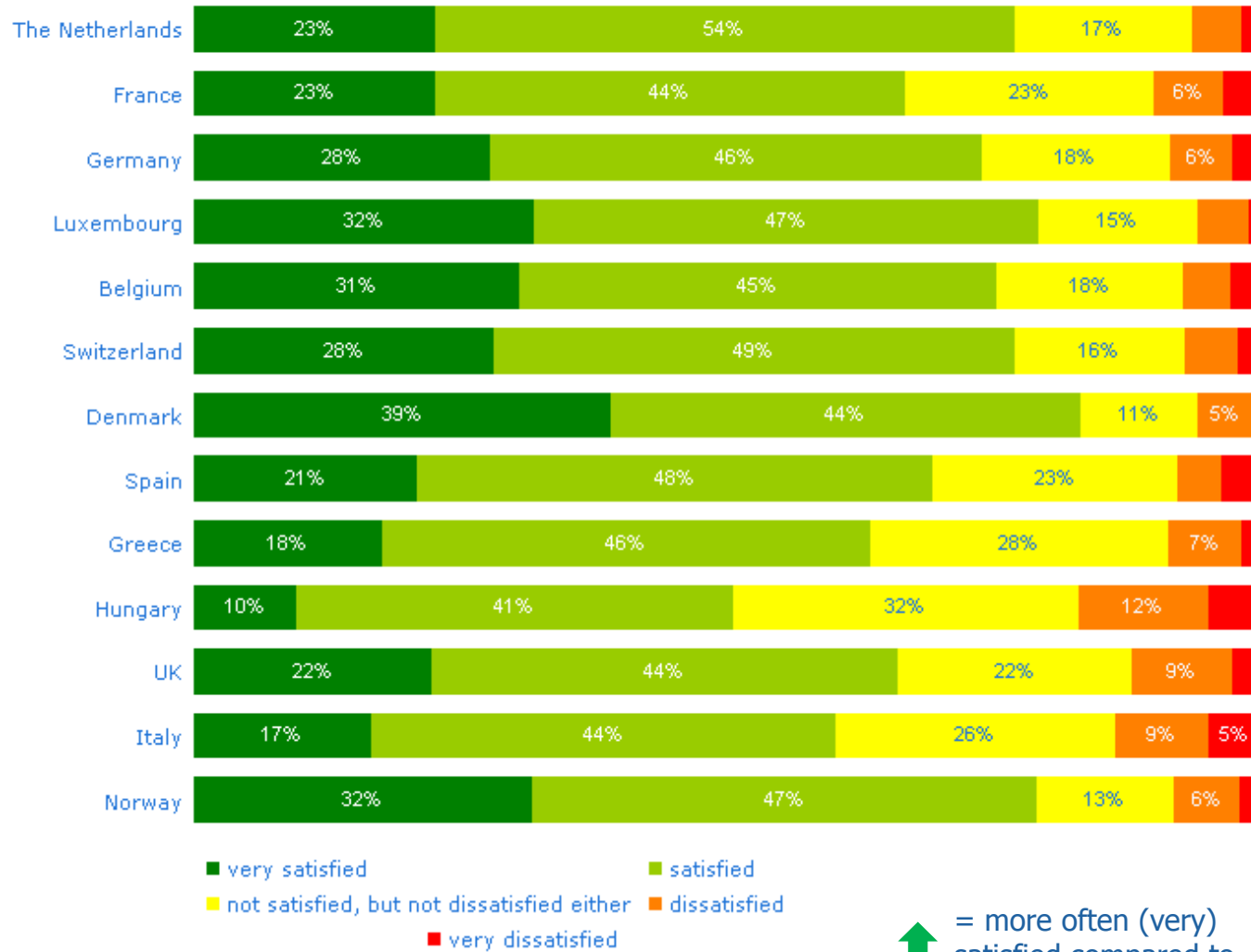


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- chapter 1: personal growth
- chapter 2: mobility
- **chapter 3: satisfaction**
- chapter 4: personal motivation

Satisfaction

Satisfaction



↑ = more often (very) satisfied compared to Q2 2010

On average around 68 % of the employees worldwide are (very) satisfied to work at their current employer.

Just like three months ago, more than a third of the employees from Scandinavia are very satisfied with their employer. In most West-European countries the employees are satisfied with their current employer and job.

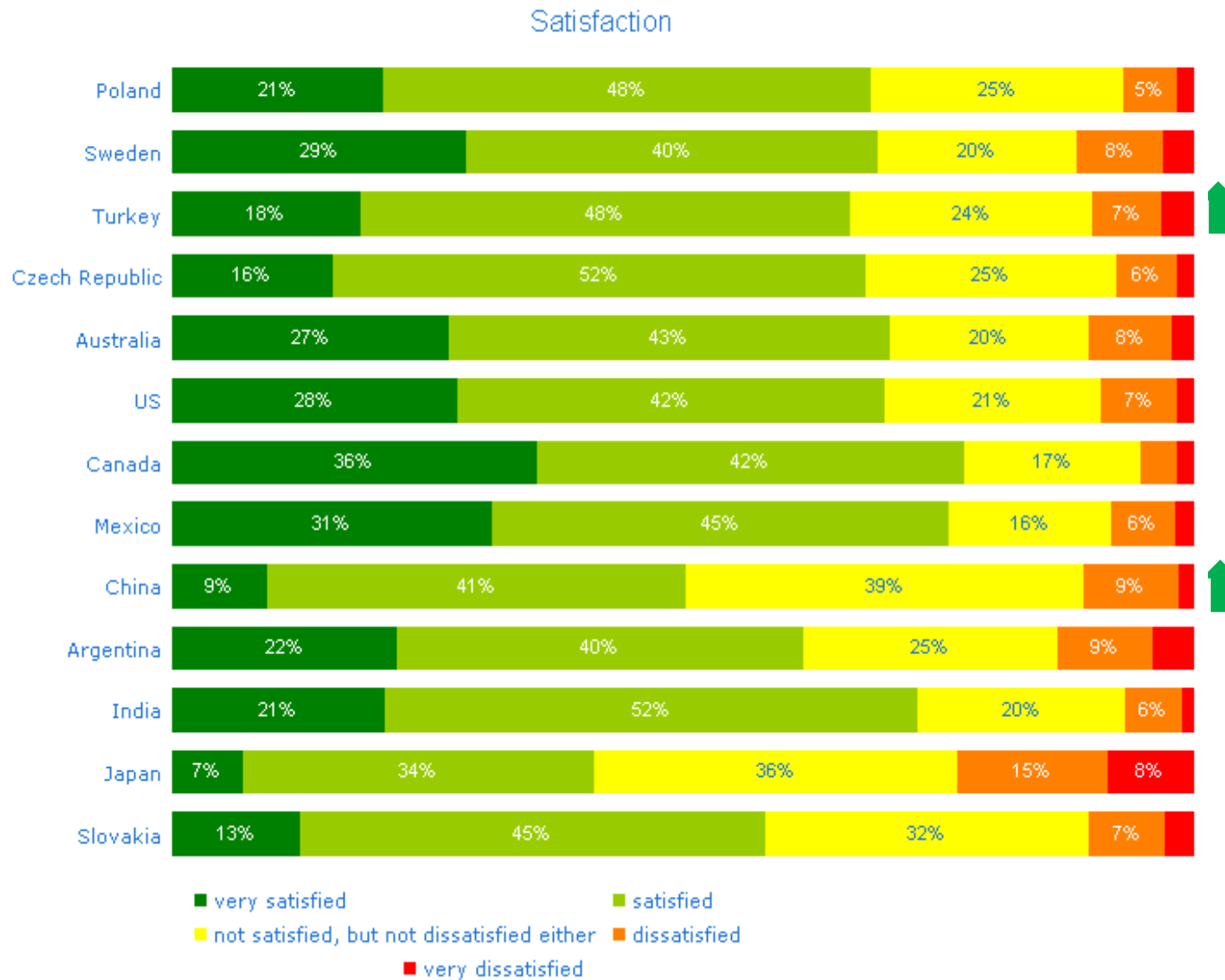
Compared to three months ago, West-European employees from Germany and Belgium are more often very satisfied with their employer.

Question:

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



Satisfaction



In Japan 23% of the employees are (very) dissatisfied with their employer. This could be the main reason for the increase in mobility in Japan over the past three months. This could be also the case in Hungary.

In East European countries like Poland, more than half of the employees are (very) satisfied with their current employer.

Compared to Q2 employees from Turkey and China are more often (very) satisfied about their employer.

↑ = more often (very) satisfied compared to Q2 2010

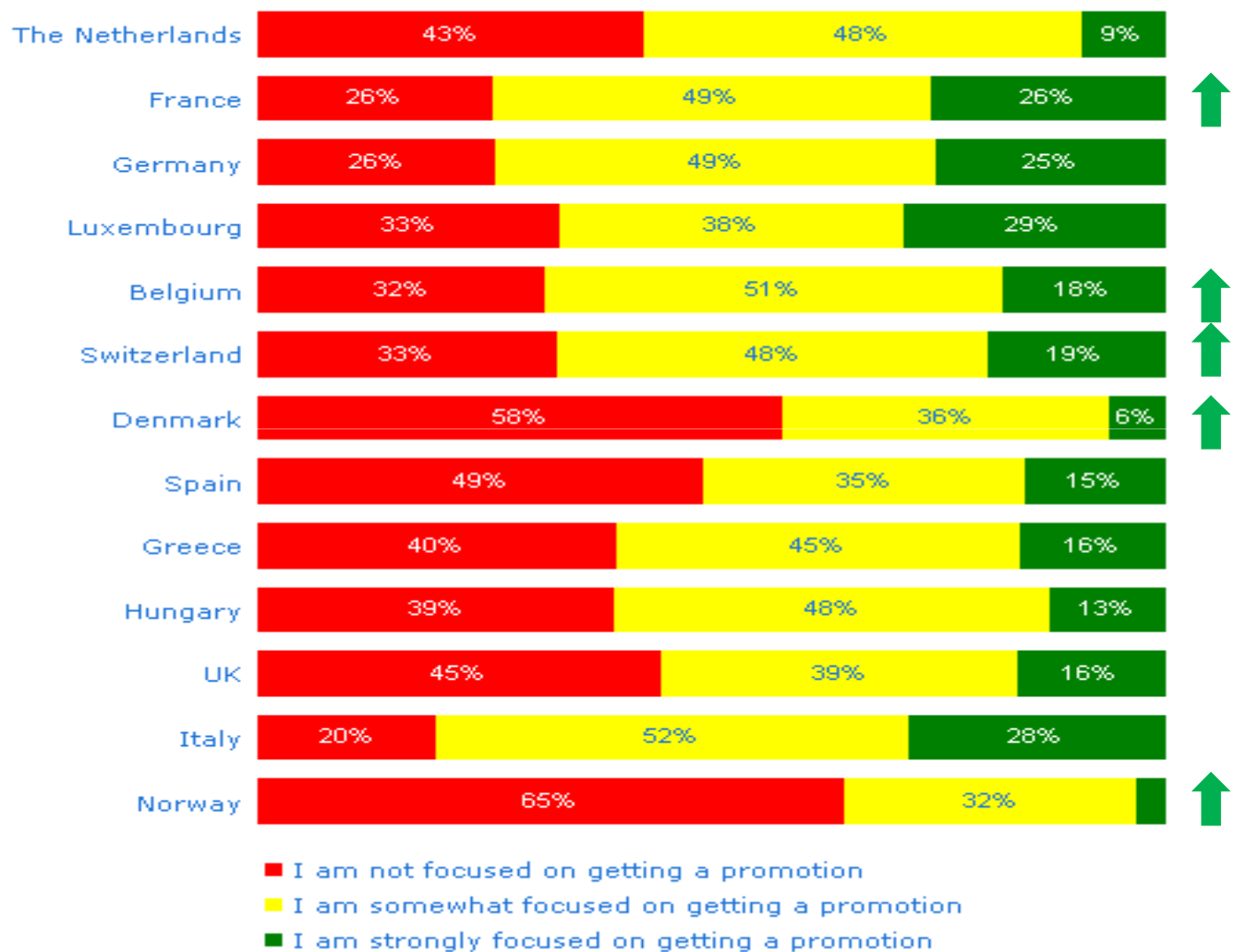


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Personal motivation

Focus on promotion



In Scandinavia, the Netherlands and Japan the employees are the least focused on getting a promotion. Of the other European countries, Italian and Slovakian employees are the most focused on getting a promotion.

Employees in 10 out of the 26 countries all over the world are more focused on getting a promotion than three months ago.

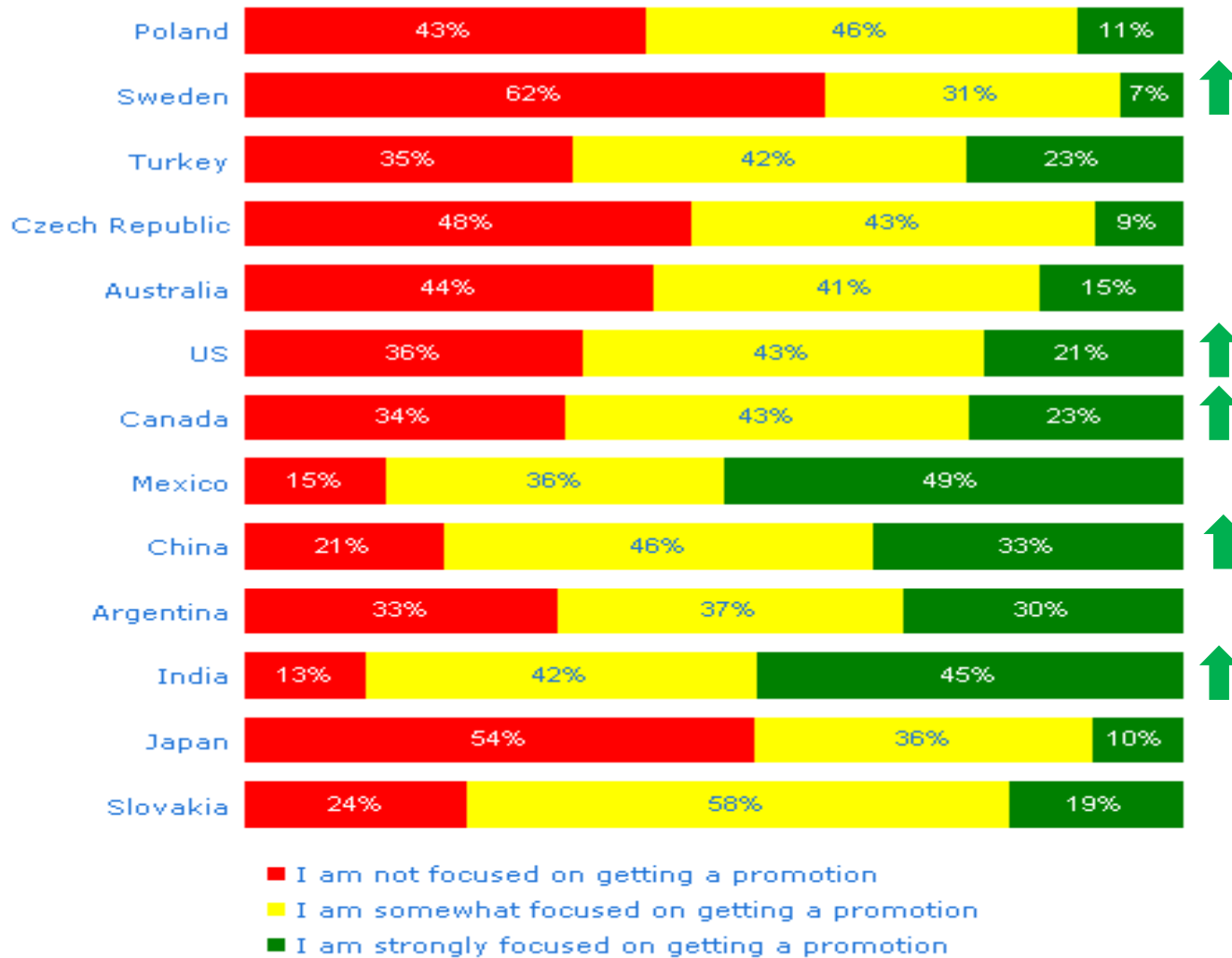
Question:

To what extent are you focused on getting a promotion?

↑ = more focused on promotion compared to Q2 2010

Personal motivation

Focus on promotion



Almost half (45%) of the Indian employees is strongly focused on getting a promotion. Three months ago only one third (36%) of the Indian employees were strongly focused on a promotion.

The decrease in the chance that they will lose their job and the increased trust in finding a new job could be explained by the higher focus on promotion. Less people fear losing their job and therefore can focus on a promotion.

↑ = more focused on promotion compared to Q2 2010

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



more information

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