global report Randstad Workmonitor 1st quarter 2017
being an entrepreneur is considered attractive,
but actually becoming one, seems a step too far
incl. quarterly mobility, job change and job satisfaction

Group Communications
Randstad Holding nv
March 2017
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outlook on entrepreneurship
53% would love to be an entrepreneur, because it gives them more opportunities
28% is considering leaving their current job and start their own business
47% state that if they lost their current job, they would like to start their own company.
57% would love to be an entrepreneur, but to them the risk of failure is too big
outlook on startups, small businesses, and multinationals
56% feel the country they live in is a good place to run a startup
50% believe that the government in their country actively supports new startups
75% agrees that due to globalization, small businesses have a hard time surviving
64% prefer to work for a small or medium enterprise or a privately-managed company
55% prefer to work for a multinational company
50% state that they would like to work for a start-up
mobility index
the global Mobility Index increased from 108 to 110 points

Question:
- Do you think you will be doing the same or comparable work for a different employer within the next 6 months?
- Do you think you will be doing different work for a different employer within the next 6 months?
mobility Luxembourg +4; Belgium +2 and the Netherlands -4

Question:
• Do you think you will be doing the same or comparable work for a different employer within the next 6 months?
• Do you think you will be doing different work for a different employer within the next 6 months?
mobility Mexico +4; US -2 and Canada no shift

Question:
• Do you think you will be doing the same or comparable work for a different employer within the next 6 months?
• Do you think you will be doing different work for a different employer within the next 6 months?
mobility Argentina +3; Chile -2 and Brazil -2

Question:
• Do you think you will be doing the same or comparable work for a different employer within the next 6 months?
• Do you think you will be doing different work for a different employer within the next 6 months?
Randstad Workmonitor - Q1 - March 2017

 mobility New Zealand +5; Australia no shift

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

mobility Sweden +8 and Norway +2; Denmark -1
mobility Japan +6, India +6, Hong Kong +5, Malaysia +2, Singapore +2; China -7

Question:
- Do you think you will be doing *the same or comparable work for a different employer* within the next 6 months?
- Do you think you will be doing *different work for a different employer* within the next 6 months?
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• Do you think you will be doing different work for a different employer within the next 6 months?
mobility Greece +6, Spain +3 and Turkey +1; Portugal -3 and Italy -1

Question:
• Do you think you will be doing the same or comparable work for a different employer within the next 6 months?
• Do you think you will be doing different work for a different employer within the next 6 months?
actual job change
Have you changed jobs during the past six months? If you have started working in your first job during the past six months, this is not a change of employment/employer; please fill in “no”

actual job change slightly increased and is now on same level as Q1 2016
Job change increased in Brazil, the UK and Turkey compared to last quarter.

In Canada, France, Japan, Malaysia and Singapore the job change decreased compared to last quarter.

<table>
<thead>
<tr>
<th>Country</th>
<th>Yes, I currently work in a comparable position at another employer</th>
<th>Yes, I currently work in a different position at the same employer</th>
<th>Yes, I currently work in a different position at a different employer</th>
<th>No, I did not change positions or employers during the past 6 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>31%</td>
<td>13%</td>
<td>5%</td>
<td>52%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>23%</td>
<td>12%</td>
<td>11%</td>
<td>55%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>22%</td>
<td>9%</td>
<td>6%</td>
<td>63%</td>
</tr>
<tr>
<td>Singapore</td>
<td>17%</td>
<td>8%</td>
<td>7%</td>
<td>69%</td>
</tr>
<tr>
<td>US</td>
<td>20%</td>
<td>7%</td>
<td>3%</td>
<td>71%</td>
</tr>
<tr>
<td>China</td>
<td>19%</td>
<td>8%</td>
<td>2%</td>
<td>72%</td>
</tr>
<tr>
<td>Norway</td>
<td>12%</td>
<td>6%</td>
<td>6%</td>
<td>76%</td>
</tr>
<tr>
<td>Australia</td>
<td>12%</td>
<td>8%</td>
<td>5%</td>
<td>76%</td>
</tr>
<tr>
<td>Brazil</td>
<td>16%</td>
<td>3%</td>
<td>5%</td>
<td>76%</td>
</tr>
<tr>
<td>Turkey</td>
<td>12%</td>
<td>7%</td>
<td>5%</td>
<td>76%</td>
</tr>
<tr>
<td>France</td>
<td>13%</td>
<td>7%</td>
<td>4%</td>
<td>76%</td>
</tr>
<tr>
<td>Chile</td>
<td>12%</td>
<td>5%</td>
<td>7%</td>
<td>77%</td>
</tr>
<tr>
<td>Sweden</td>
<td>9%</td>
<td>8%</td>
<td>6%</td>
<td>78%</td>
</tr>
<tr>
<td>Greece</td>
<td>9%</td>
<td>5%</td>
<td>7%</td>
<td>78%</td>
</tr>
<tr>
<td>Spain</td>
<td>10%</td>
<td>5%</td>
<td>7%</td>
<td>79%</td>
</tr>
<tr>
<td>UK</td>
<td>9%</td>
<td>7%</td>
<td>4%</td>
<td>79%</td>
</tr>
</tbody>
</table>

**Question:** Have you changed jobs during the past six months?
actual job change lowest in Luxembourg

Randstad Workmonitor - Q1 - March 2017

Question:
Have you changed jobs during the past six months?

- Yes, I currently work in a comparable position at another employer
- Yes, I currently work in a different position at the same employer
- Yes, I currently work in a different position at a different employer
- No, I did not change positions or employers during the past 6 months

Luxembourg: 2% (Yes, I currently work in a comparable position at another employer), 3% (Yes, I currently work in a different position at the same employer), 92% (Yes, I currently work in a different position at a different employer), 0% (No, I did not change positions or employers during the past 6 months)
job change appetite
India has highest appetite for job change

Compared to last quarter, the job appetite increased in Belgium, Germany, Hungary, Malaysia and Spain.

Brazil, Greece and Sweden show a decrease in appetite compared to last quarter.

**Question:**

To what extent are you currently looking for another job?

- I am actively applying for jobs
- I am specifically orientating myself
- I am looking round a bit
- I am not actively doing so, but if something were to come up I would be open to it
- I am not actively doing so
lowest appetite for job change in Luxembourg and Turkey

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

- I am actively applying for jobs
- I am specifically orientating myself
- I am looking round a bit
- I am not actively doing so, but if something were to come up I would be open to it
- I am not actively doing so
job satisfaction
job satisfaction is highest in Mexico and US

Compared to last quarter, the job satisfaction increased in Japan, Poland, Portugal and Singapore.

The job satisfaction decreased in Argentina, China, Malaysia, Spain and Sweden.

Question: How satisfied are you in general about working with your current employer?
job satisfaction lowest in Japan and Hong Kong

Question:
• How satisfied are you in general about working with your current employer?
about the Randstad Workmonitor
Background to the Randstad Workmonitor (1)

• The Randstad Workmonitor was launched in the Netherlands in 2003, then in Germany, and covers 33 countries around the world. In this quarter Slovakia was not included. The study encompasses Europe, Asia Pacific and the Americas. The Randstad Workmonitor is published 4 times a year, making both local and global trends in mobility visible over time.

• The Workmonitor’s Mobility Index, which tracks employee confidence and captures the likelihood of an employee changing jobs within the next 6 months, provides a comprehensive understanding of sentiments and trends in the job market. Besides mobility, the survey addresses employee satisfaction and personal motivation as well as a rotating set of themed questions.
The study is conducted online among employees aged 18-65, working a minimum of 24 hours a week in a paid job (not self-employed). Minimum sample size is 400 interviews per country. The Survey Sampling International (SSI) panel is used for sampling purposes. The first survey of 2017 was conducted from January 13 till January 29 2017 in the following countries:

<table>
<thead>
<tr>
<th>Country 1</th>
<th>Country 2</th>
<th>Country 3</th>
<th>Country 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>Czech Republic</td>
<td>Italy</td>
<td>Portugal</td>
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<tr>
<td>Australia</td>
<td>Denmark</td>
<td>Japan</td>
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<tr>
<td>Austria</td>
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<td>Luxembourg</td>
<td>Spain</td>
</tr>
<tr>
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</tr>
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<td>China</td>
<td>India</td>
<td>Poland</td>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>US</td>
</tr>
</tbody>
</table>