

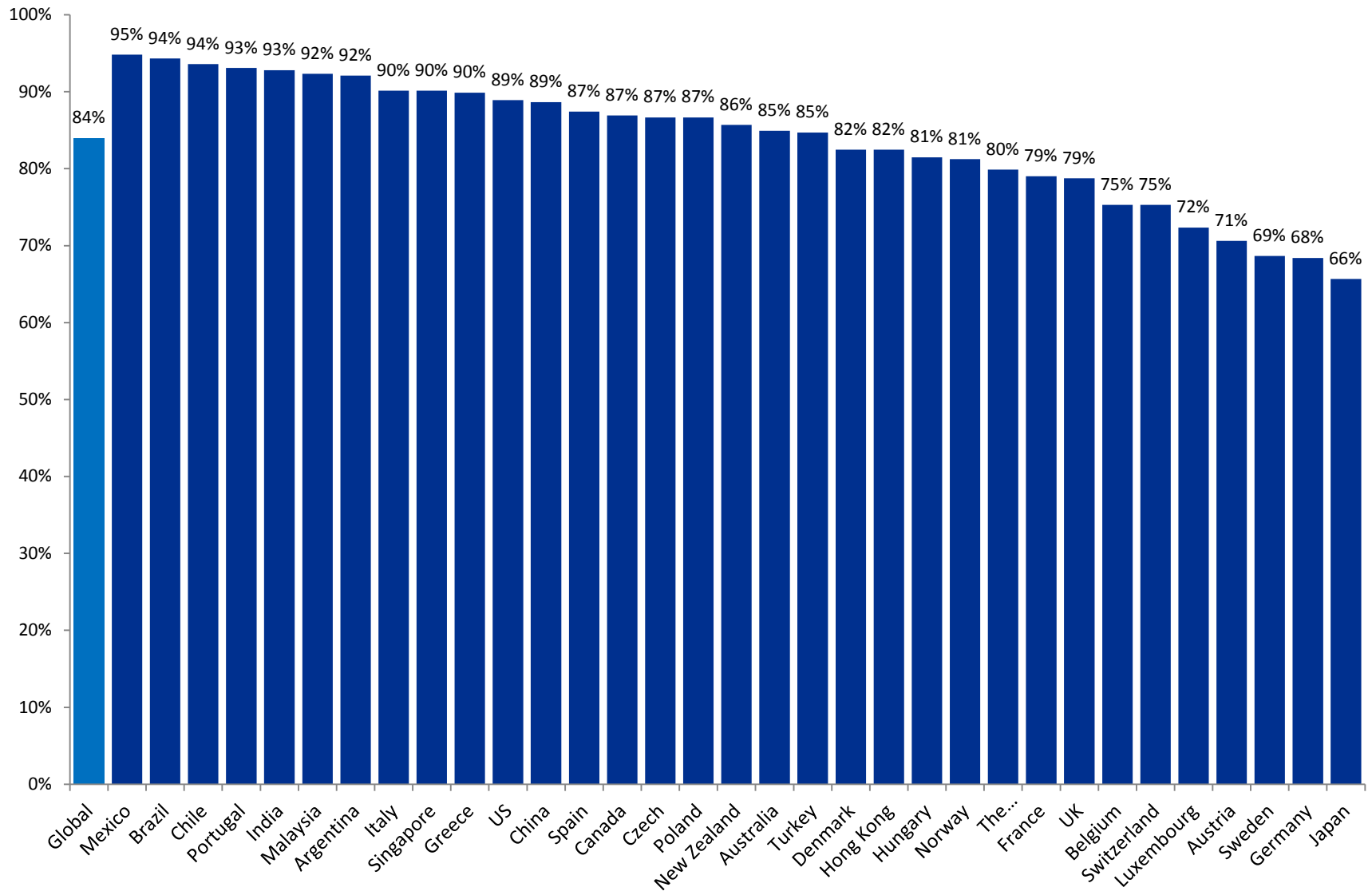
global report Randstad Workmonitor - Q4 2016

Digital awareness is rising, but we're not there yet
incl. quarterly mobility, job change, and job satisfaction

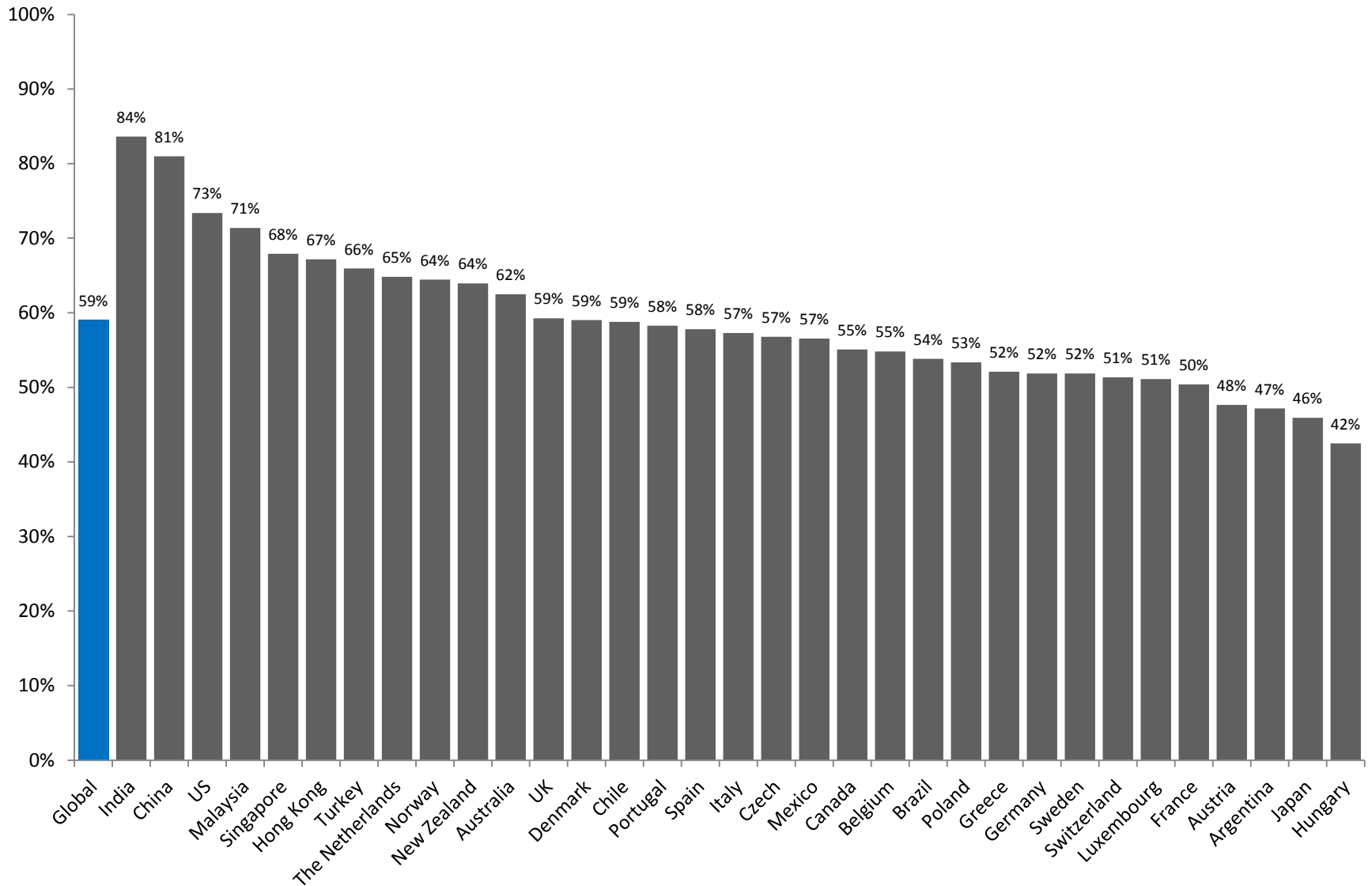
Group Communications
Randstad Holding nv
December 2016



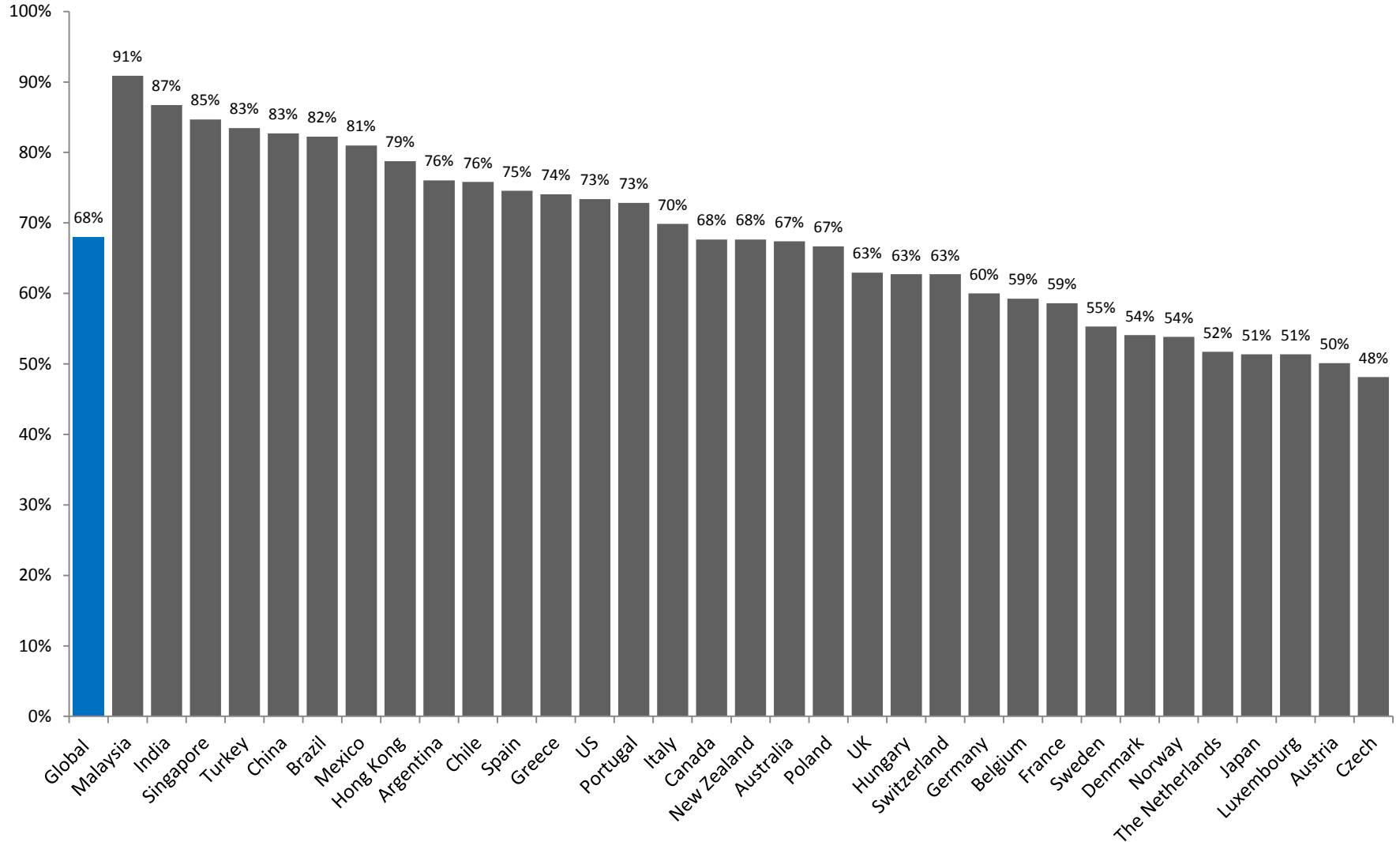
84% believe that every company should have a digital strategy



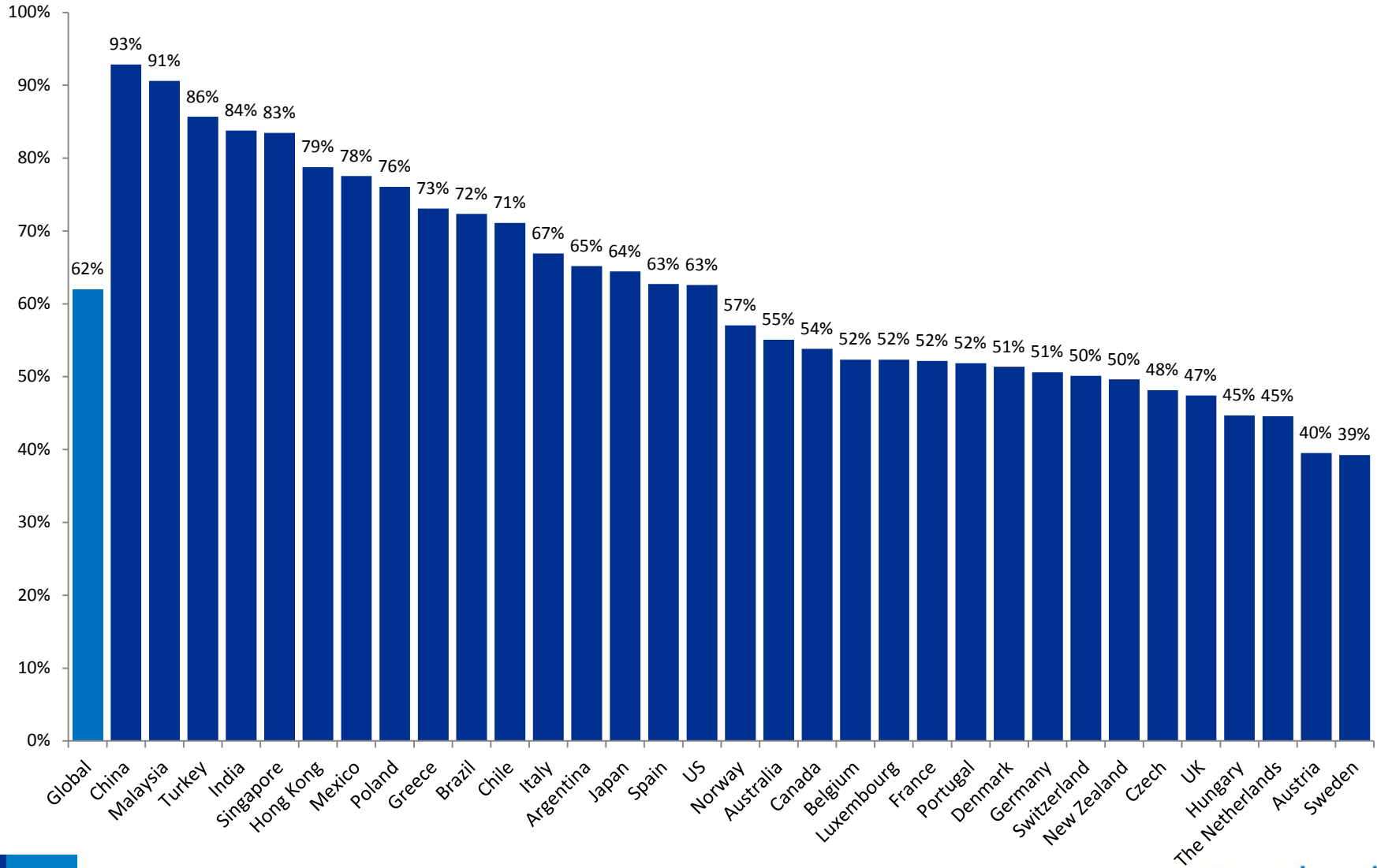
59% state that their employer has a digital strategy



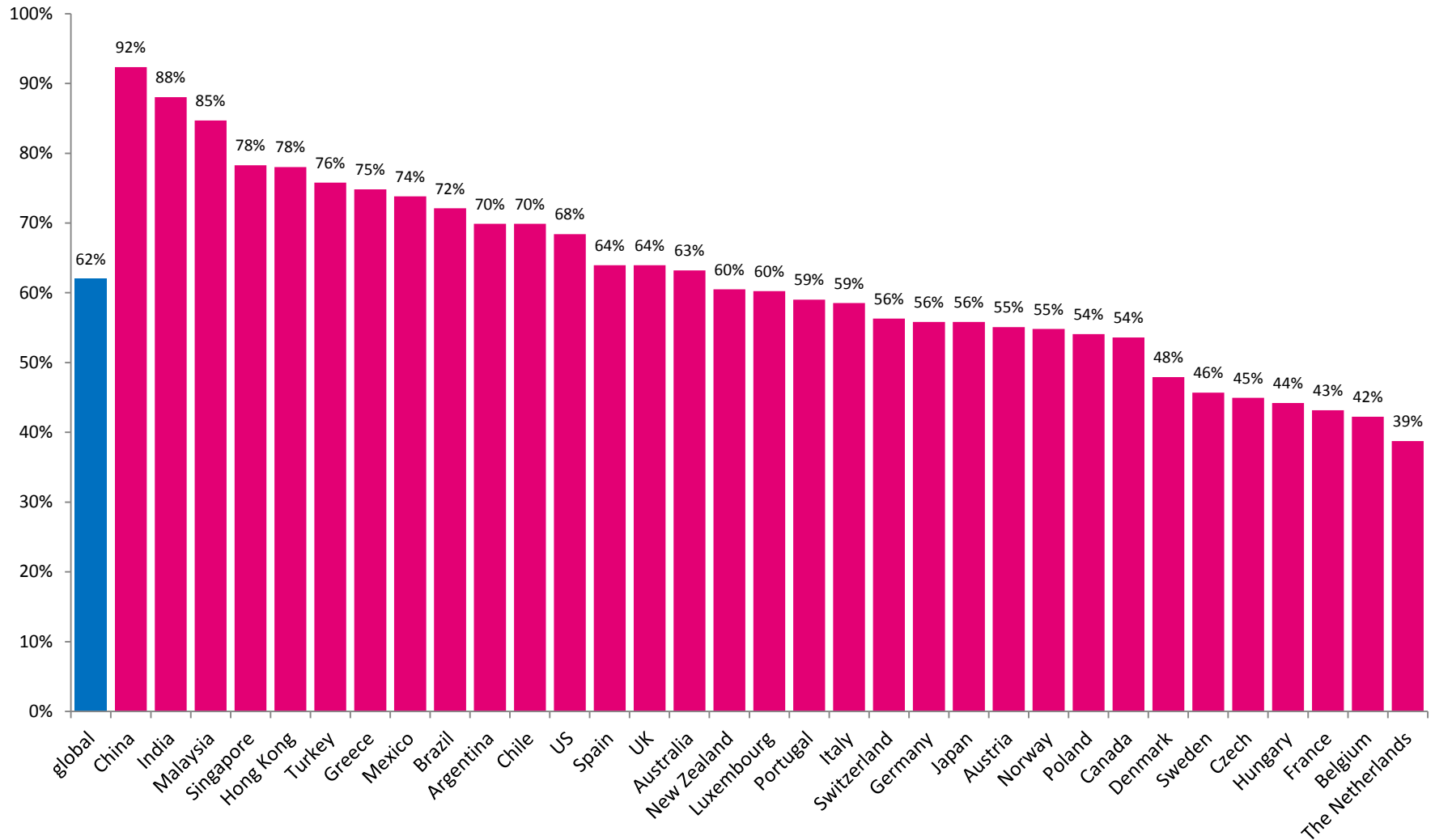
68% agree that digitization requires different skill sets than currently available with the employees at their current employer



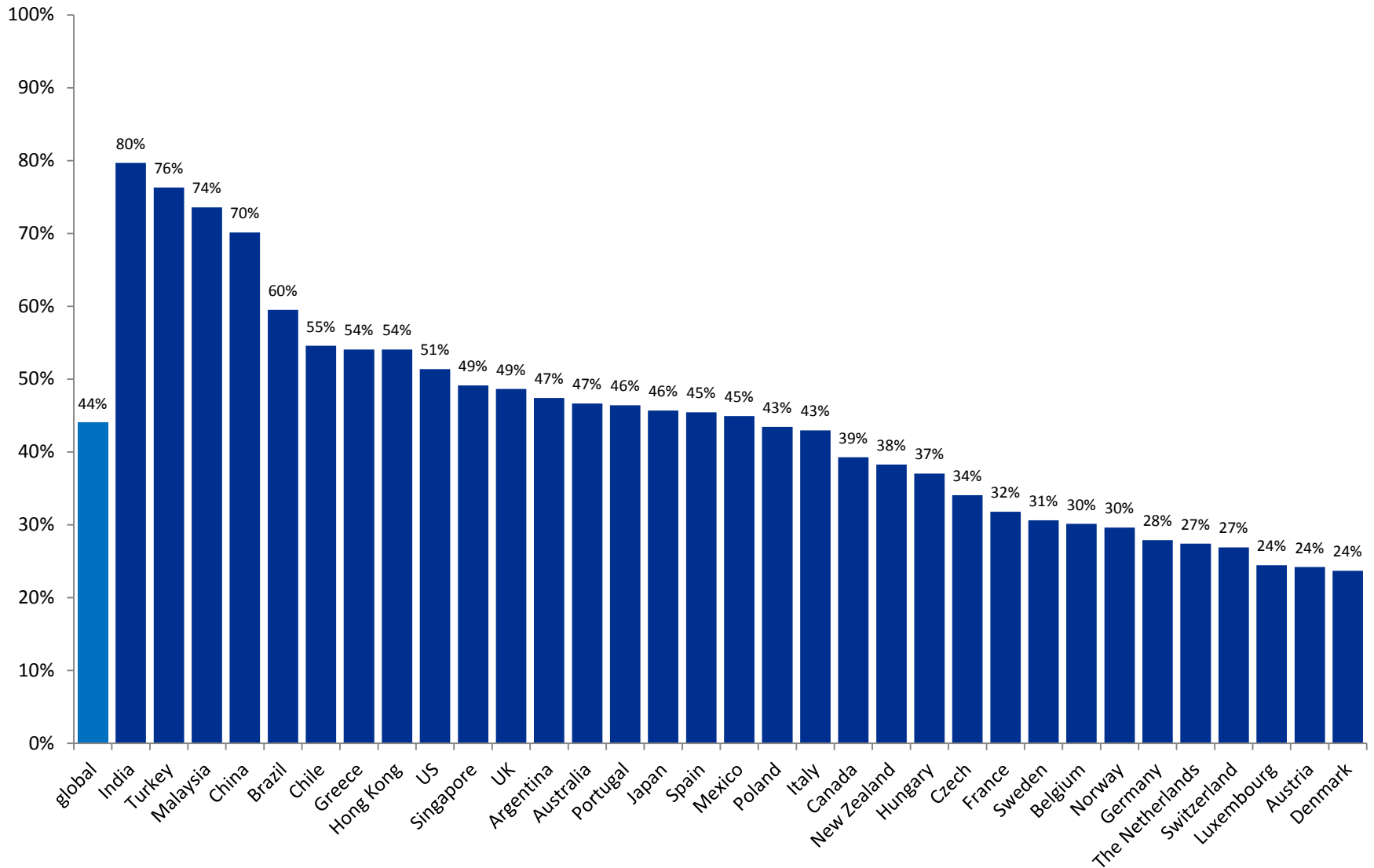
62% believe that they personally need to acquire more digital skills to guarantee their future employability



62% state that if repetitive tasks are being automated, they expect to be able to add much more personal value to their job

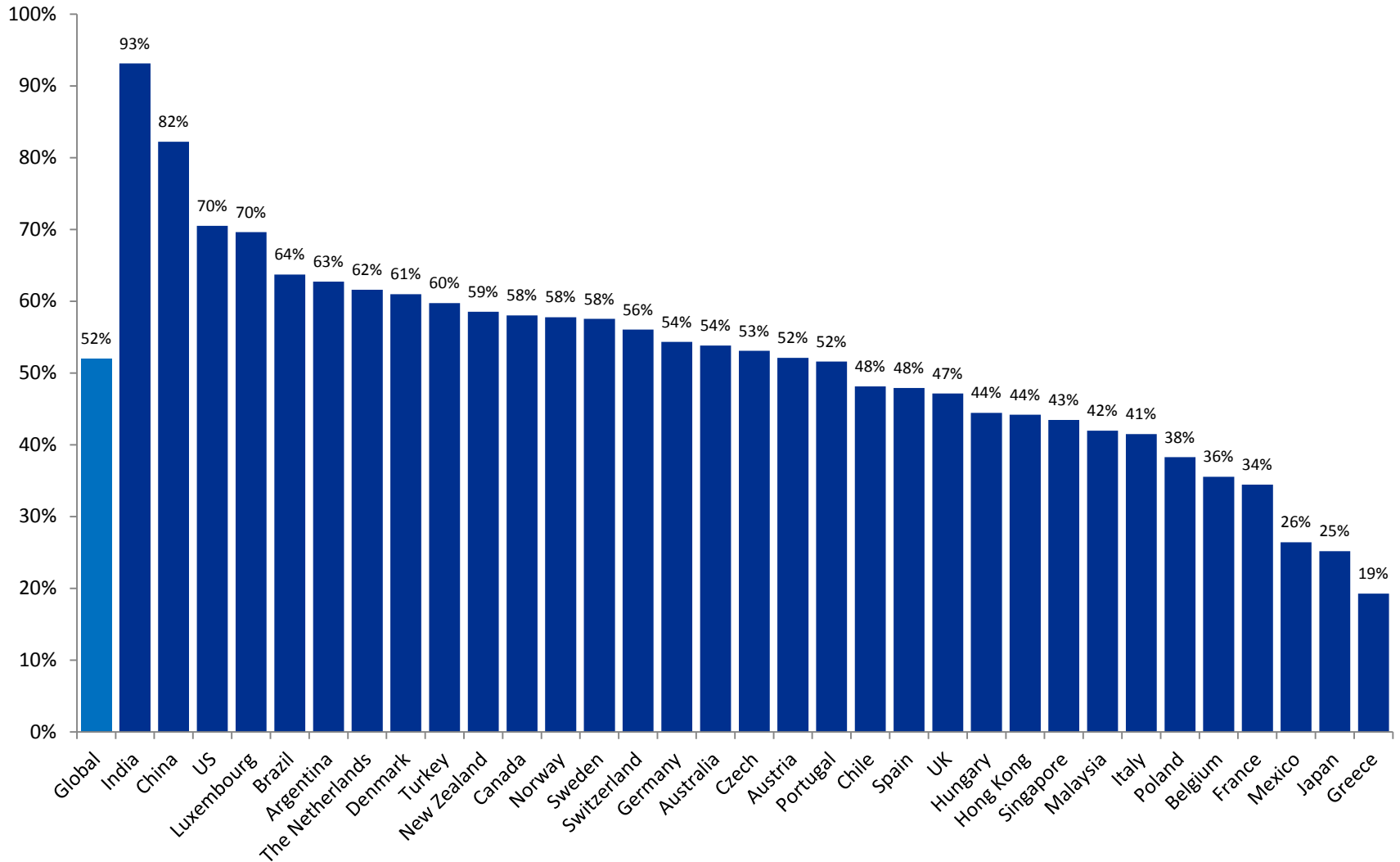


44% agree that they perform (a lot of) repetitive work and/or routine tasks that could be automated

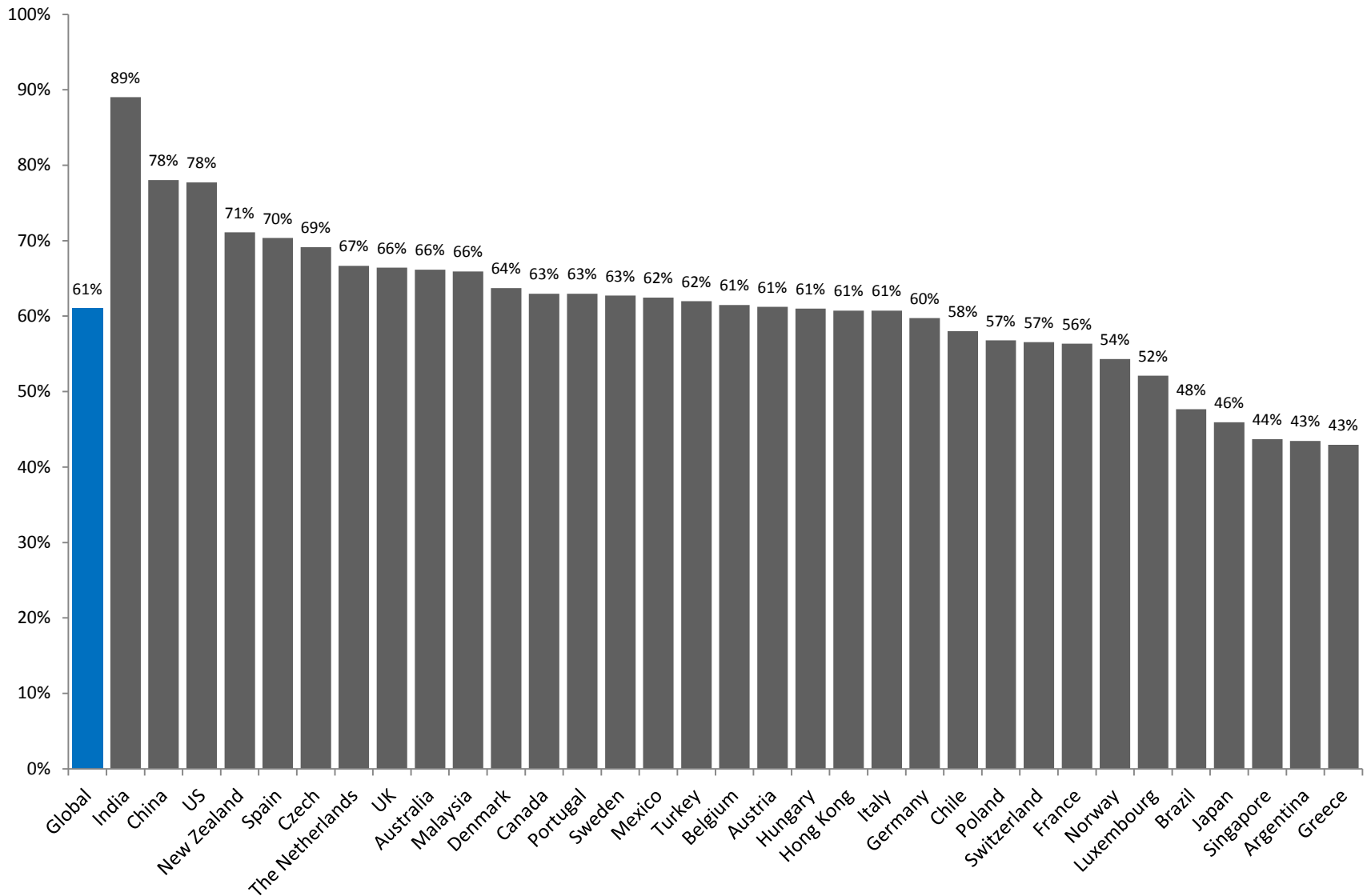


Outlook on economic and financial situation

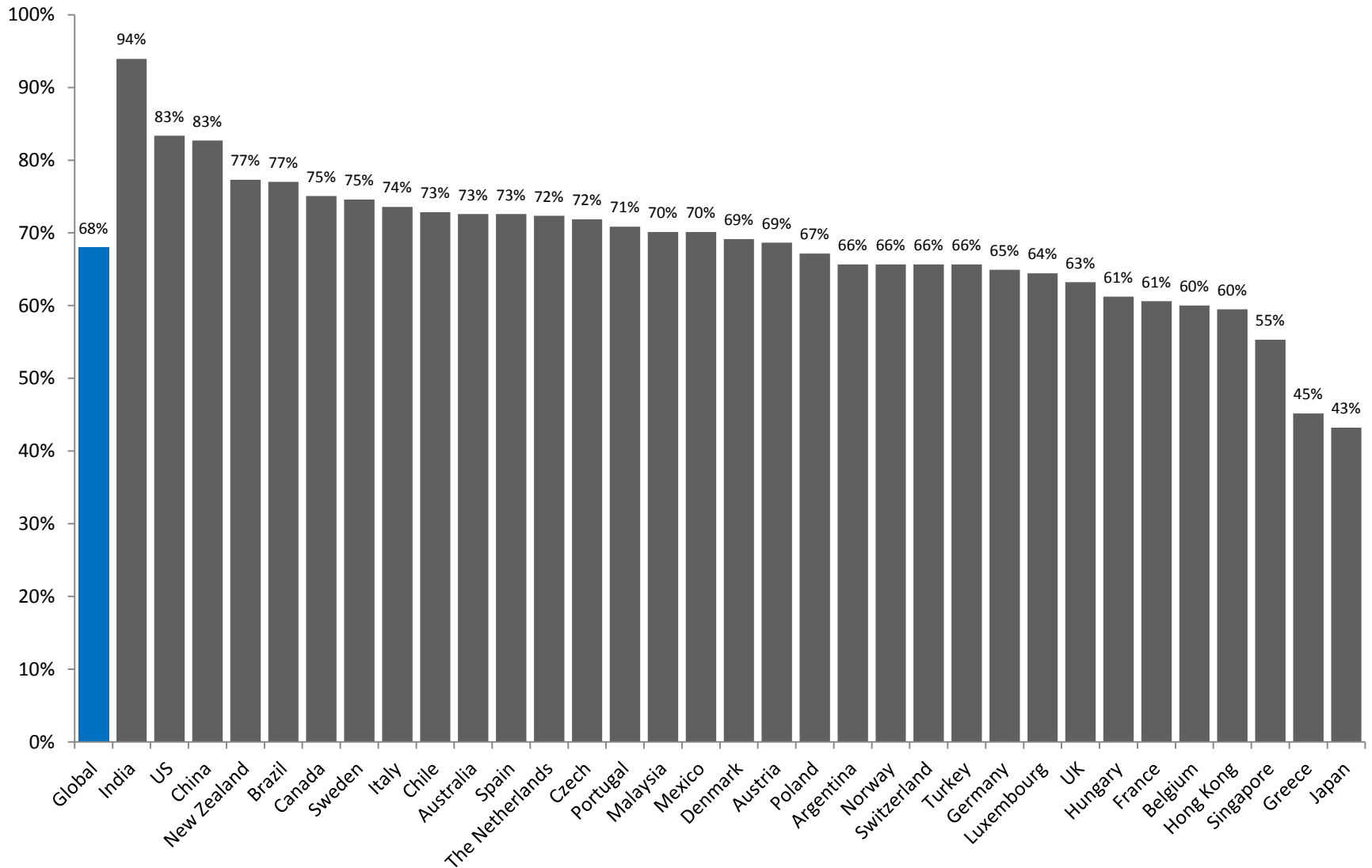
52% expect the economic situation in their country to improve in 2017



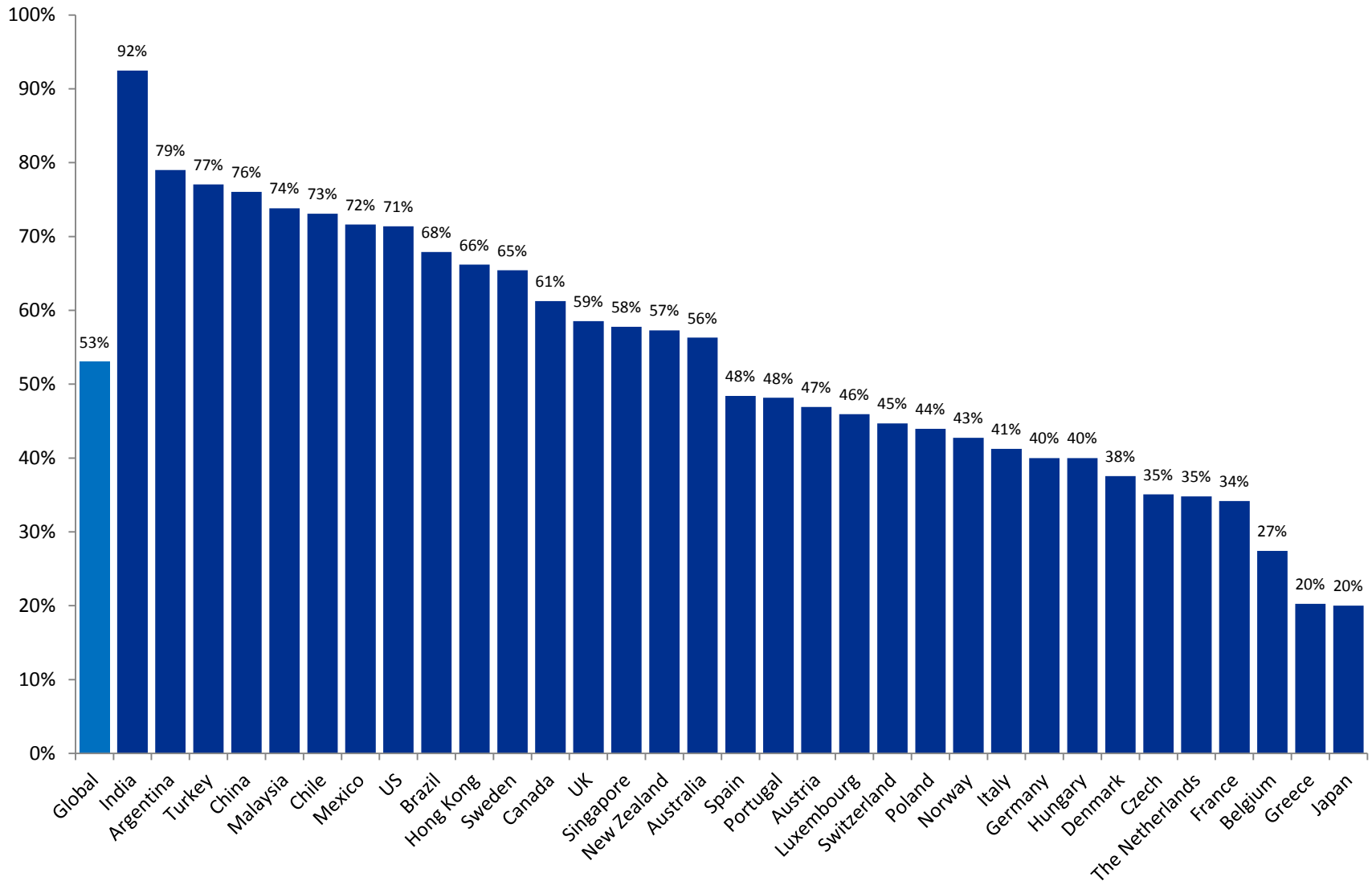
61% state that their employer performed better financially in 2016 than in 2015



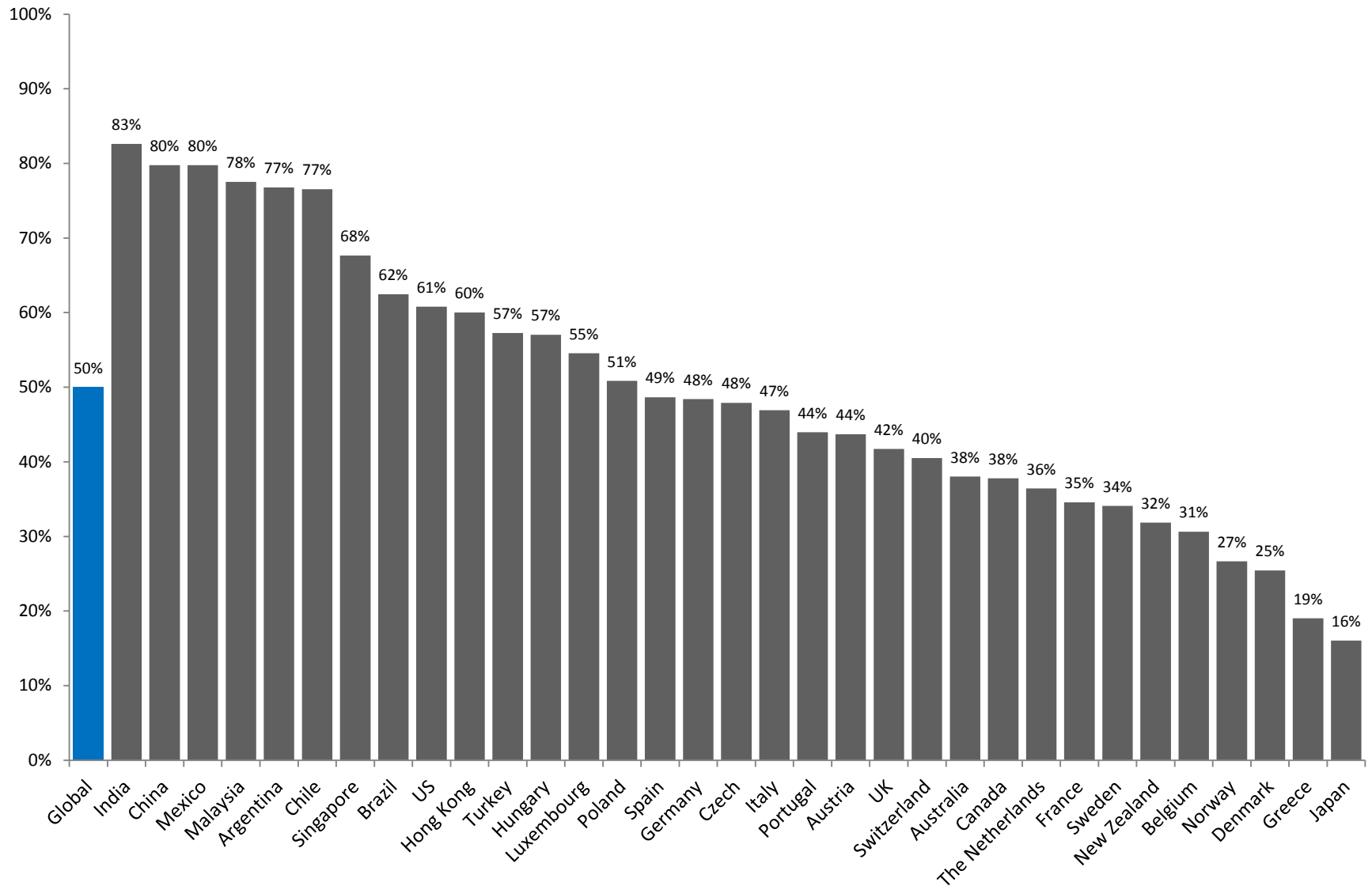
68% expect their employer to perform better financially in 2017 than in 2016



53% expect to receive a raise at the end of the fiscal year

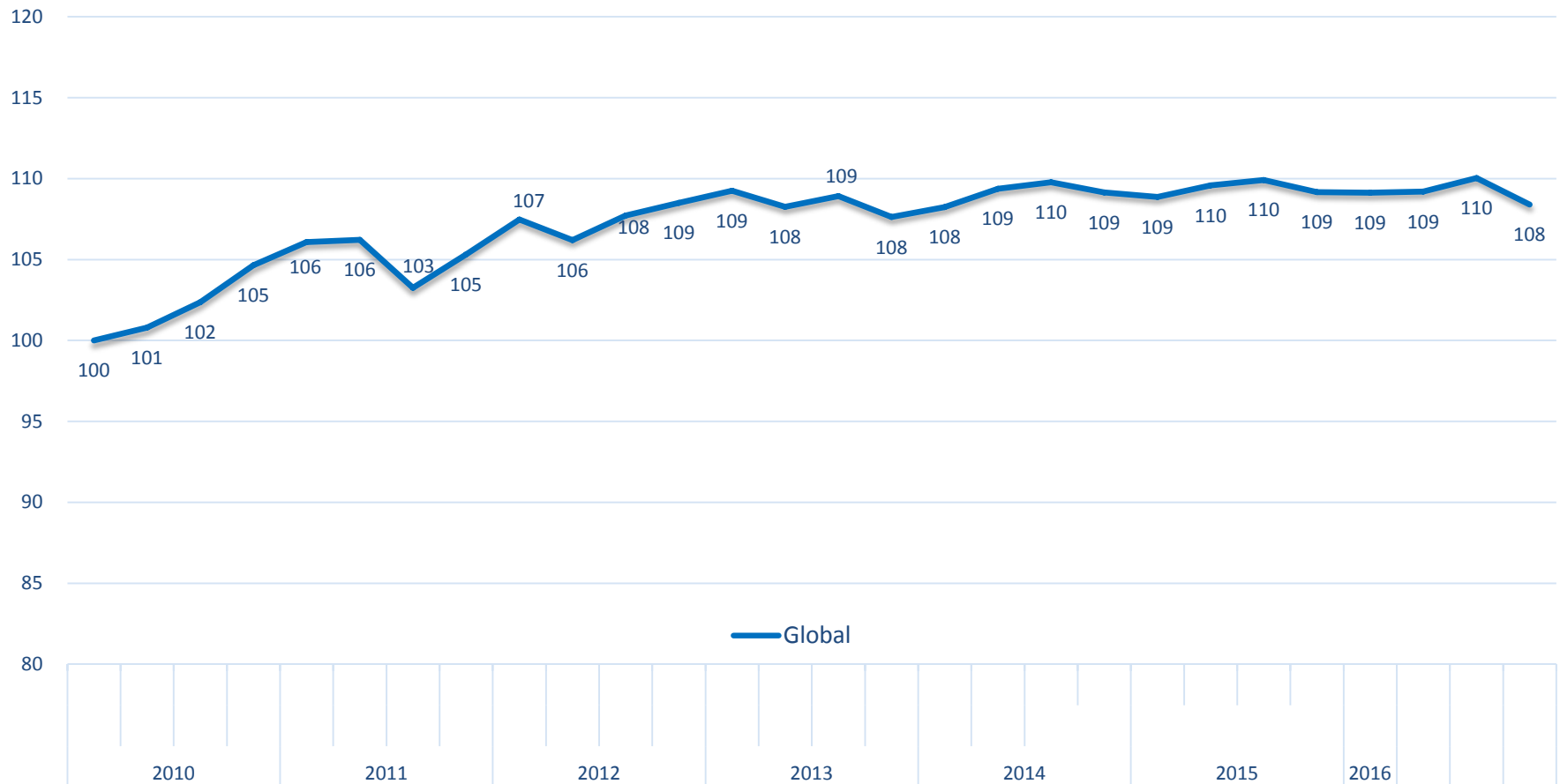


50% expect to receive a one-time financial reward/bonus at the end of the fiscal year



Mobility Index

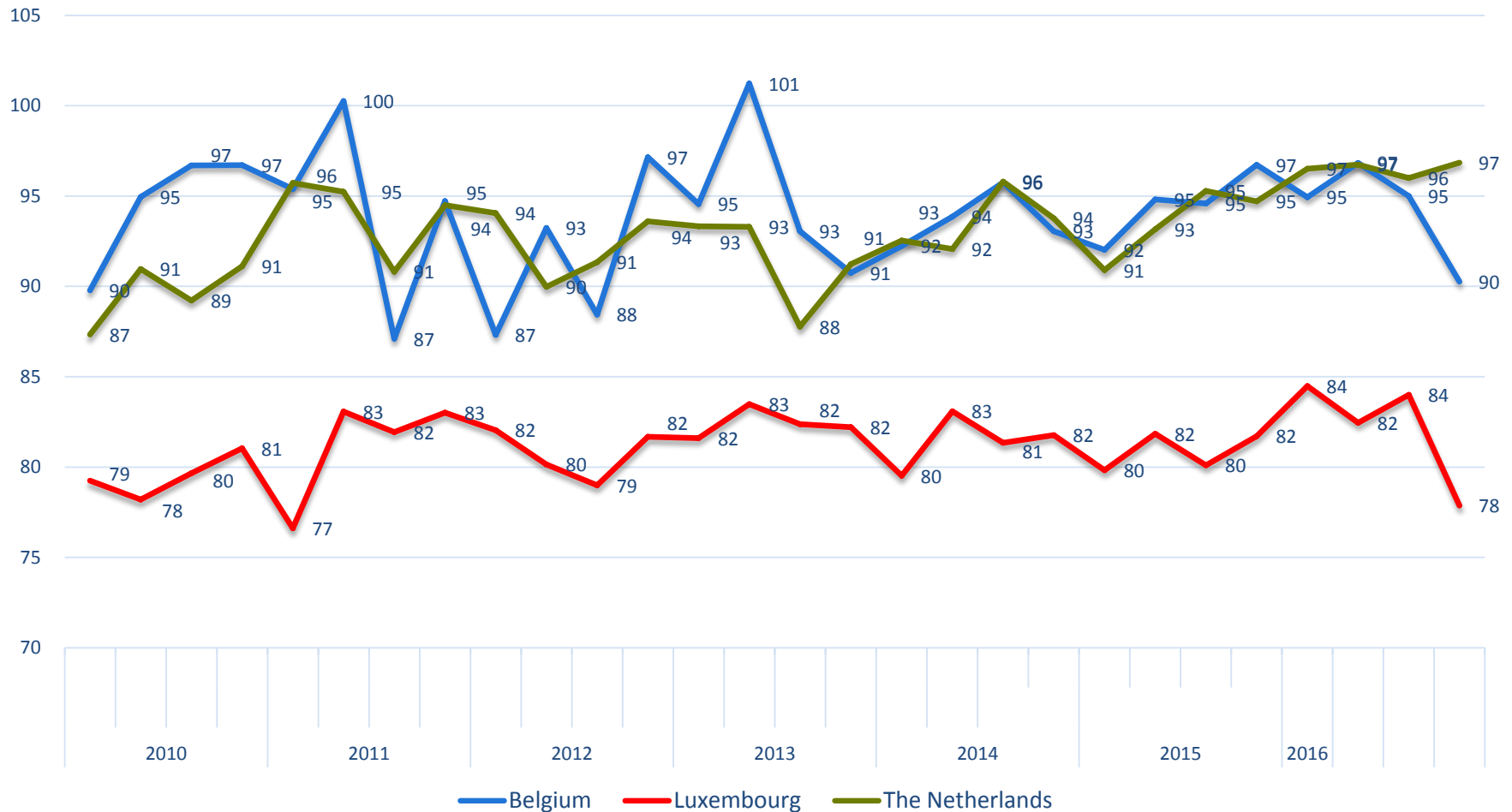
the global Mobility Index slightly down from 110 to 108



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?

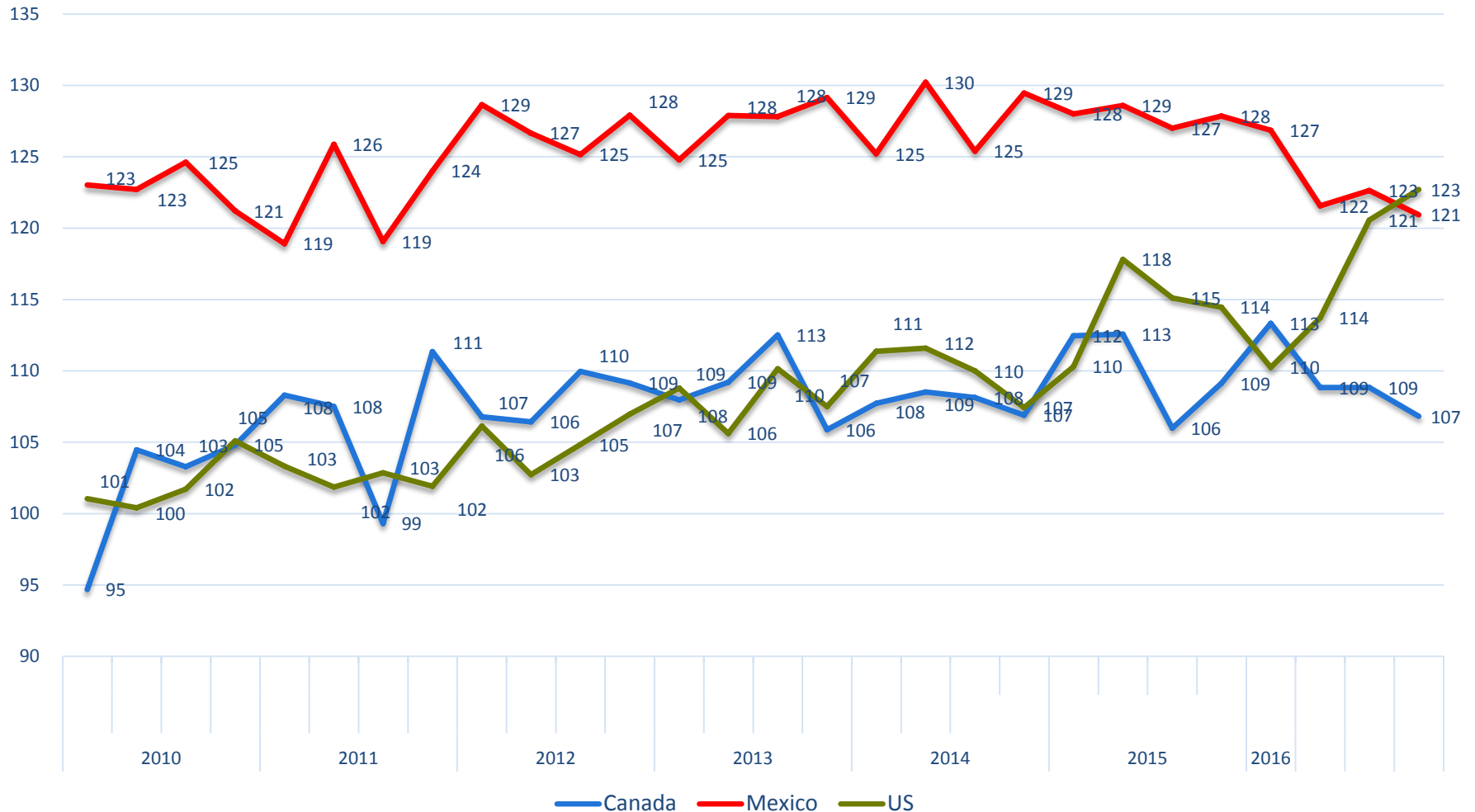
mobility Luxembourg -6; Belgium -5 and the Netherlands +1



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?

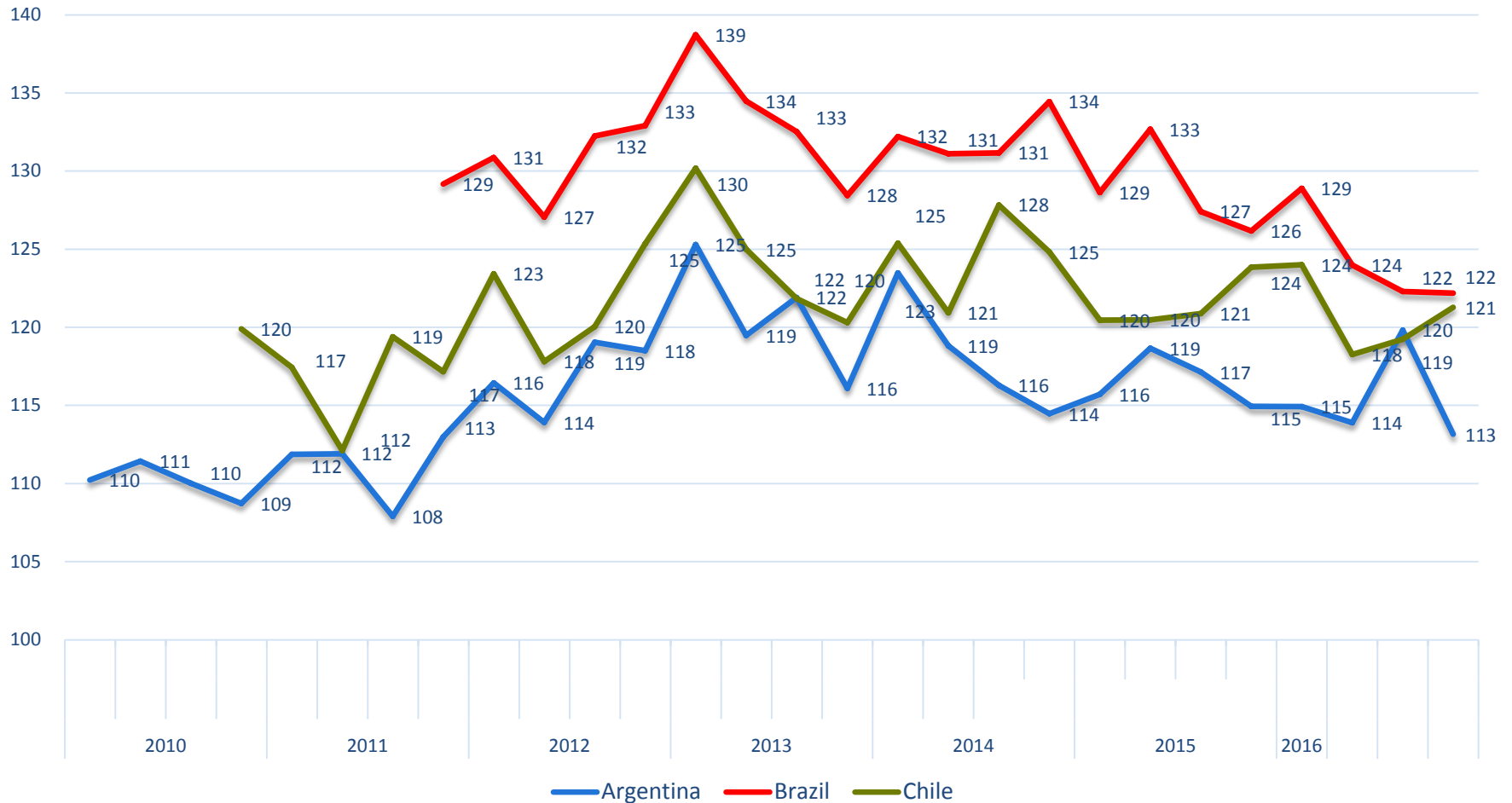
mobility US +2; Canada -2 and Mexico -1



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?

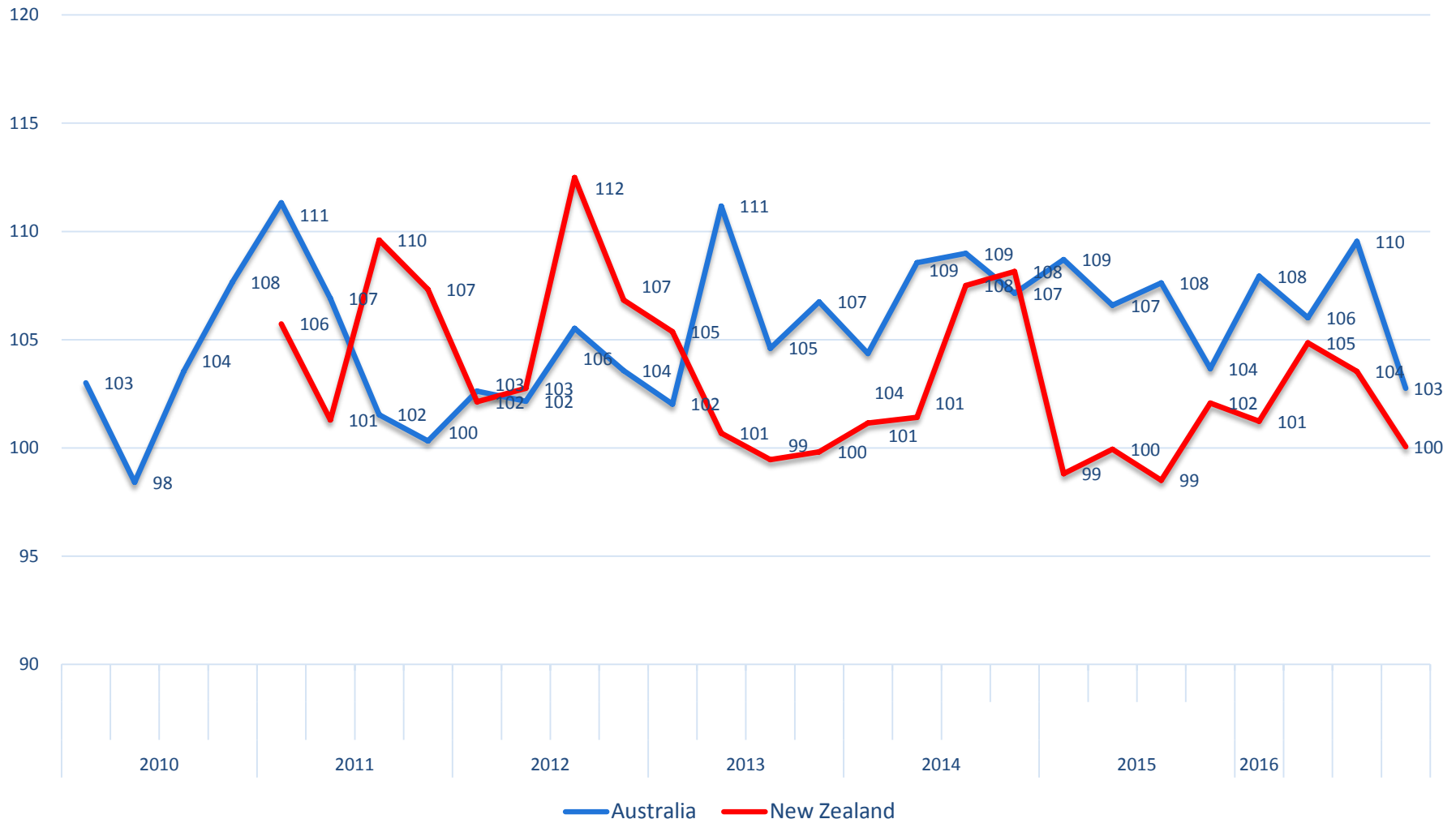
mobility Argentina -7 and Chile +1; Brazil no shift



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?

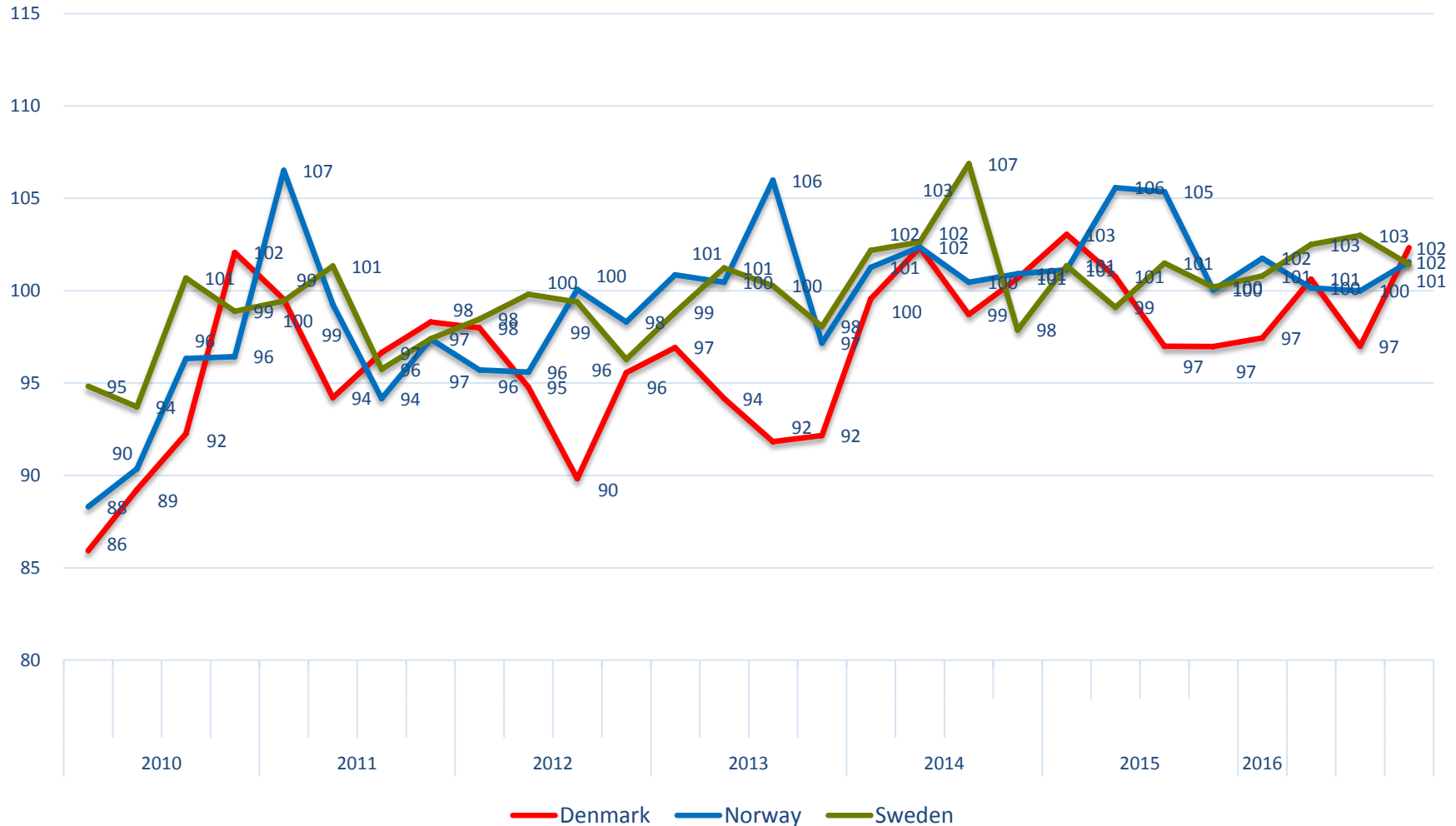
mobility Australia -7 and New Zealand -4



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?

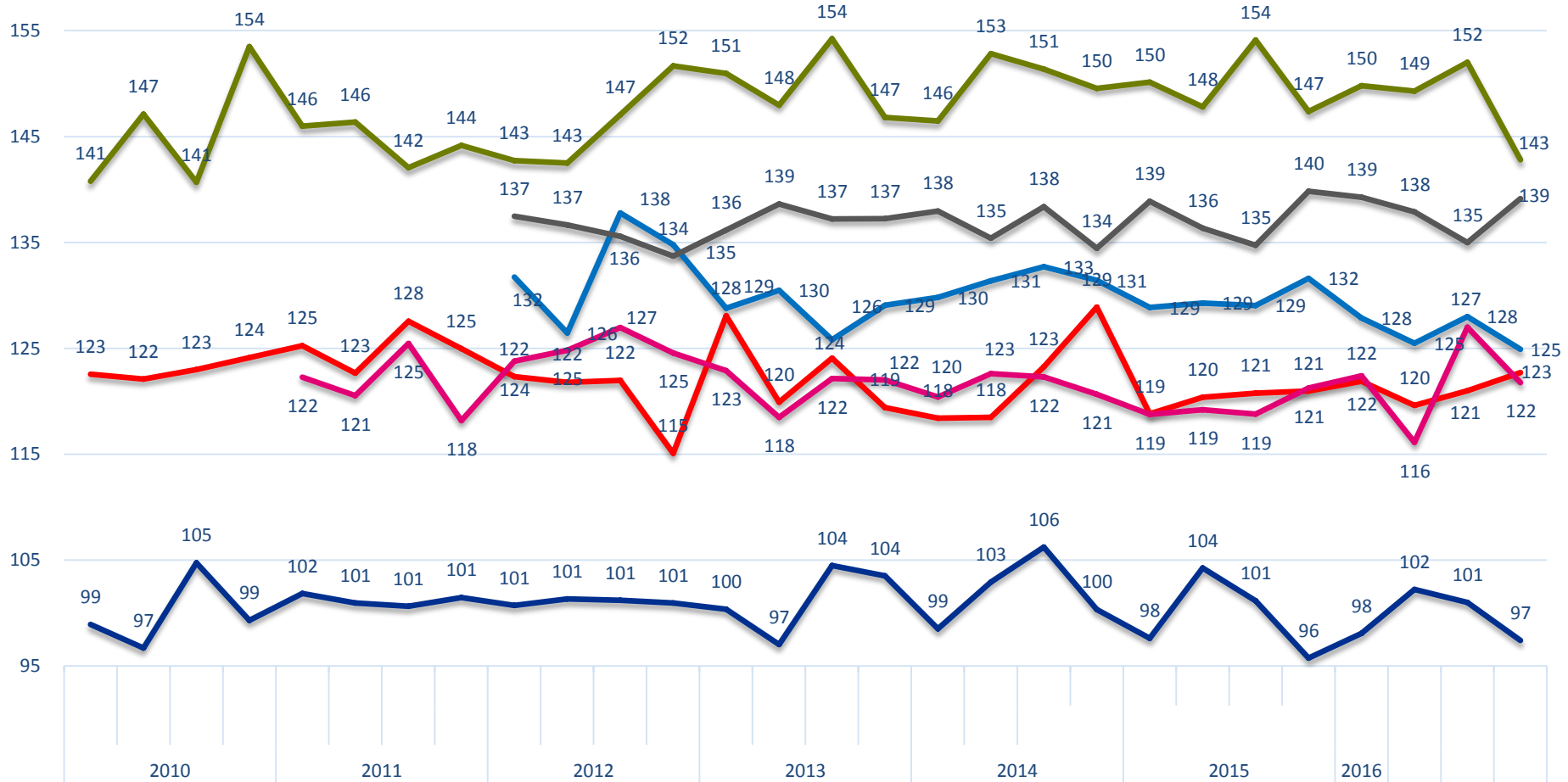
mobility Denmark +5 and Norway +2; Sweden -1



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?

mobility India -9 , Singapore -5, Japan -4 and Hong Kong -3; Malaysia +4 and China +2

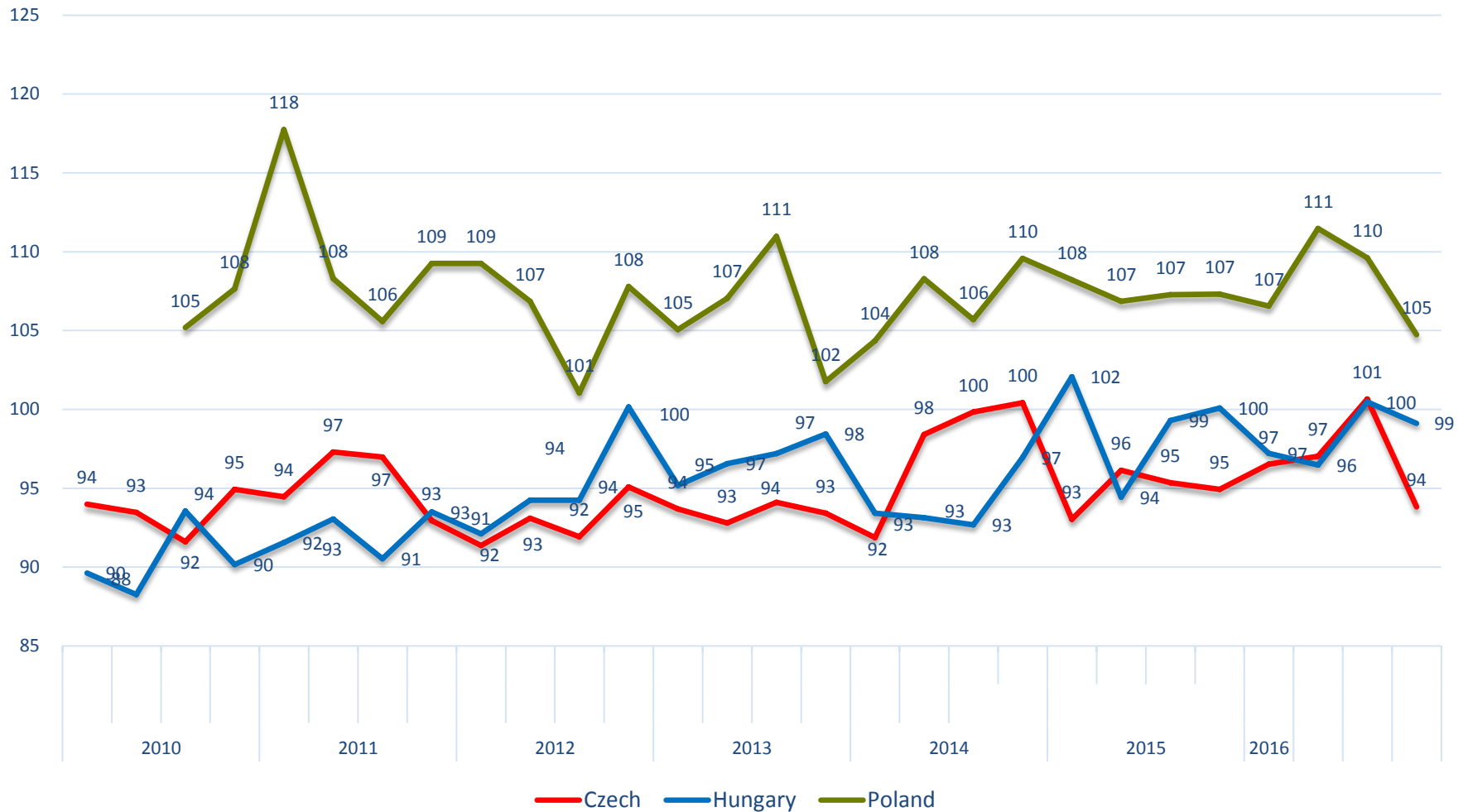


Question:

— China — Hong Kong — India — Japan — Malaysia — Singapore

- 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?

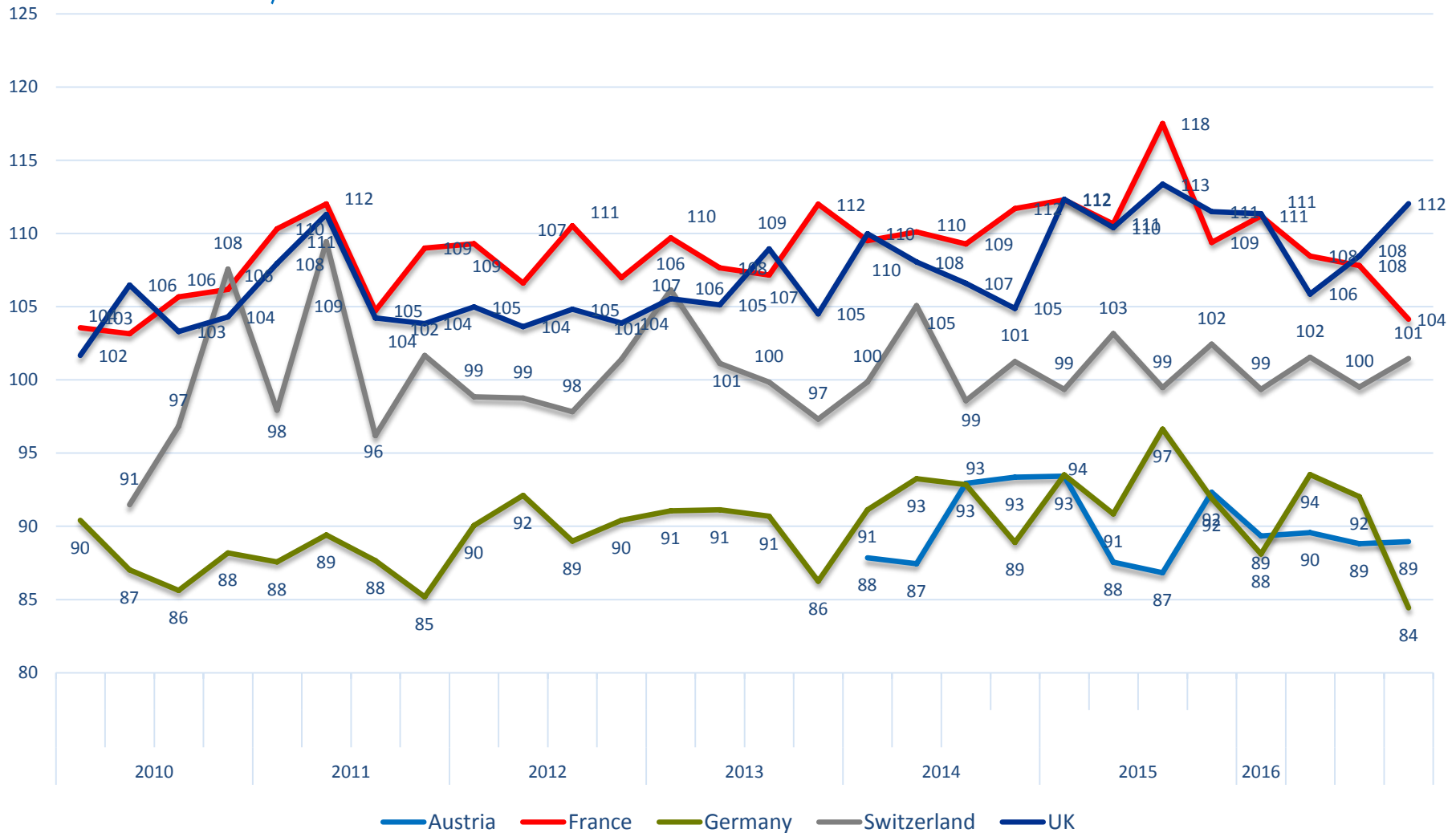
mobility Czech Republic -7, Poland -5 and Hungary -1



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?

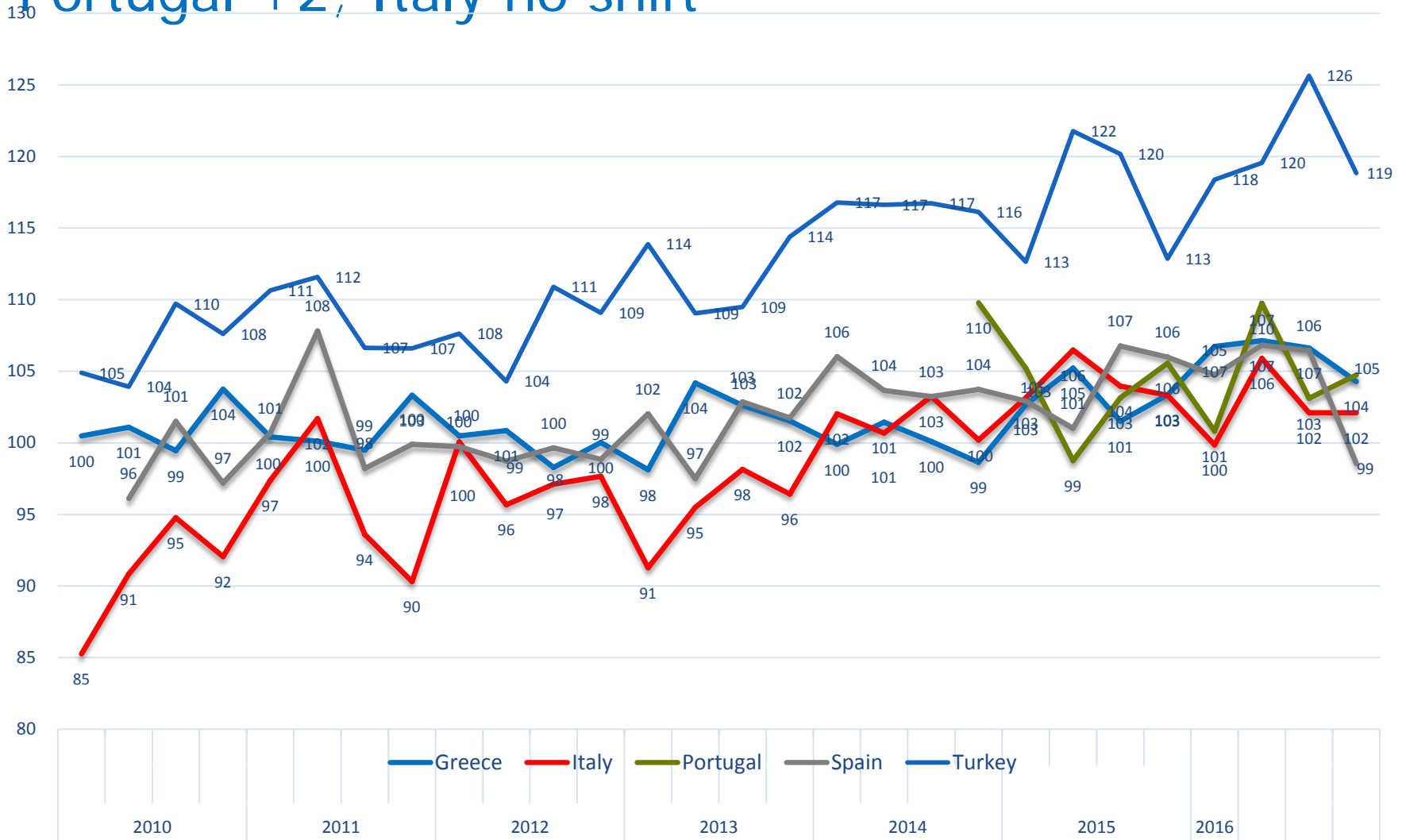
mobility UK +4 and Switzerland +1; Germany -8 and France -4; Austria no shift



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 Spain -7, Turkey -5 and Greece -3; Portugal +2; Italy no shift

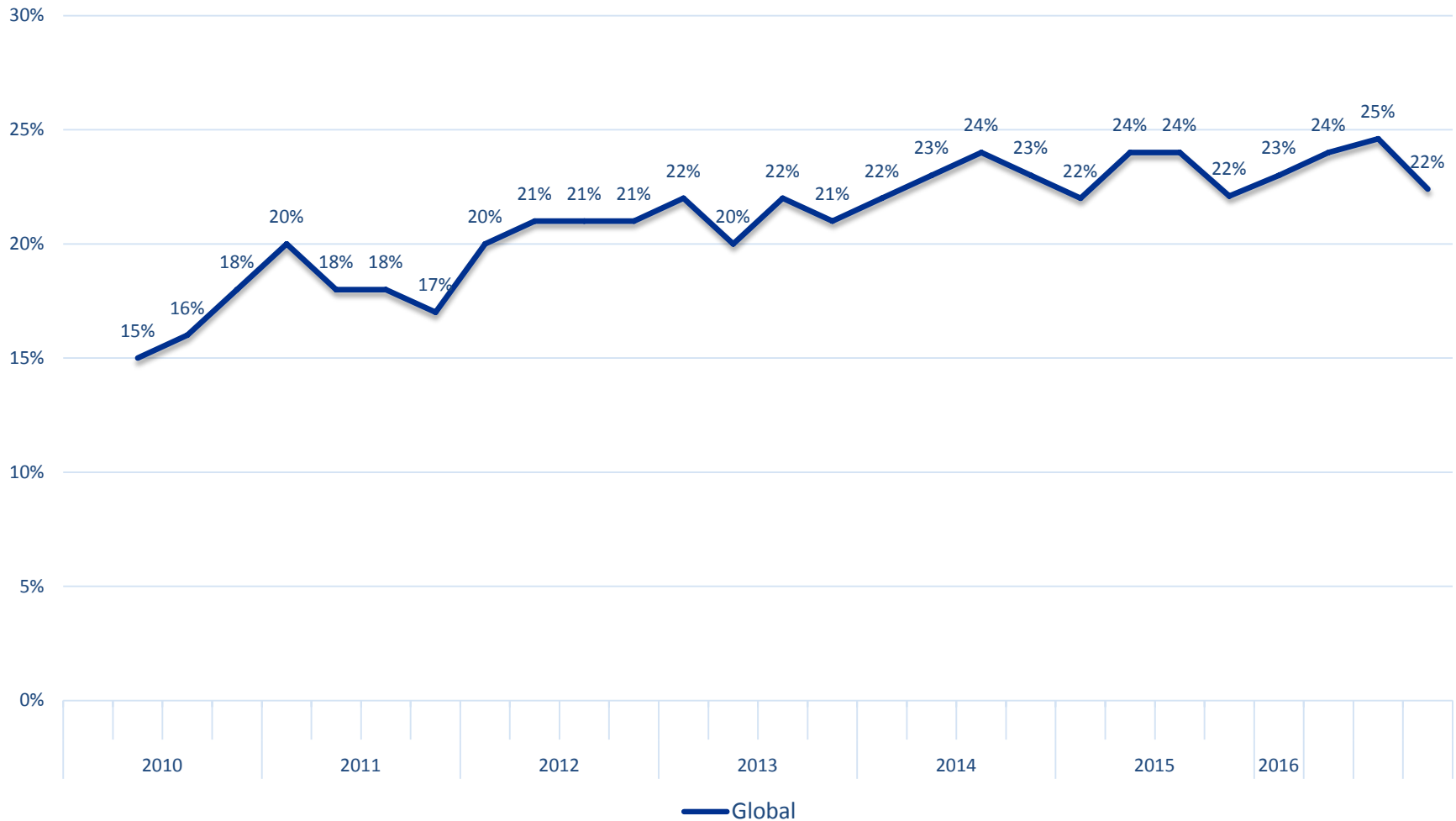


Question:

- 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?

Actual job change

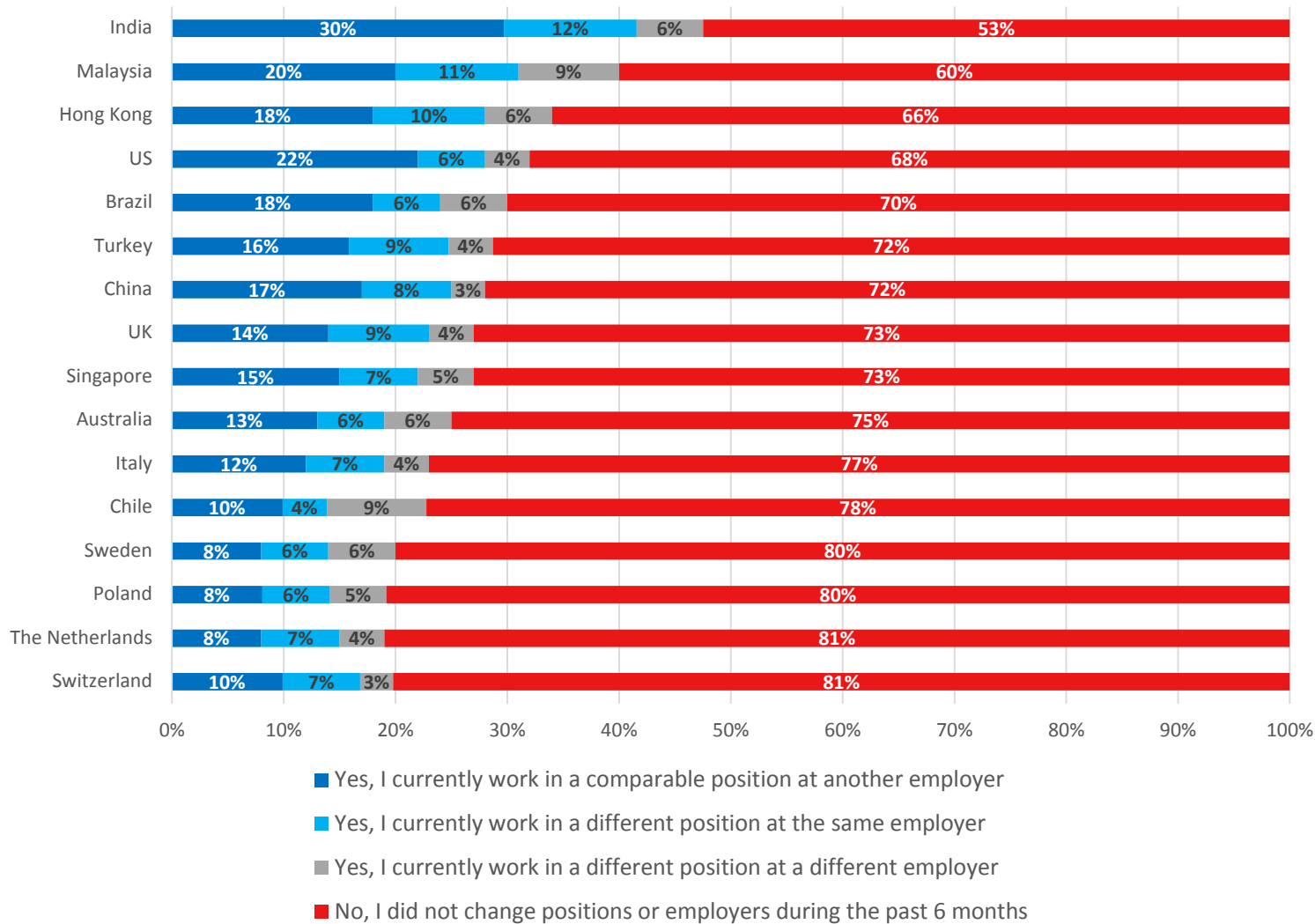
actual job change decreased and is now on same level as Q4 2015



Question:

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 highest in India



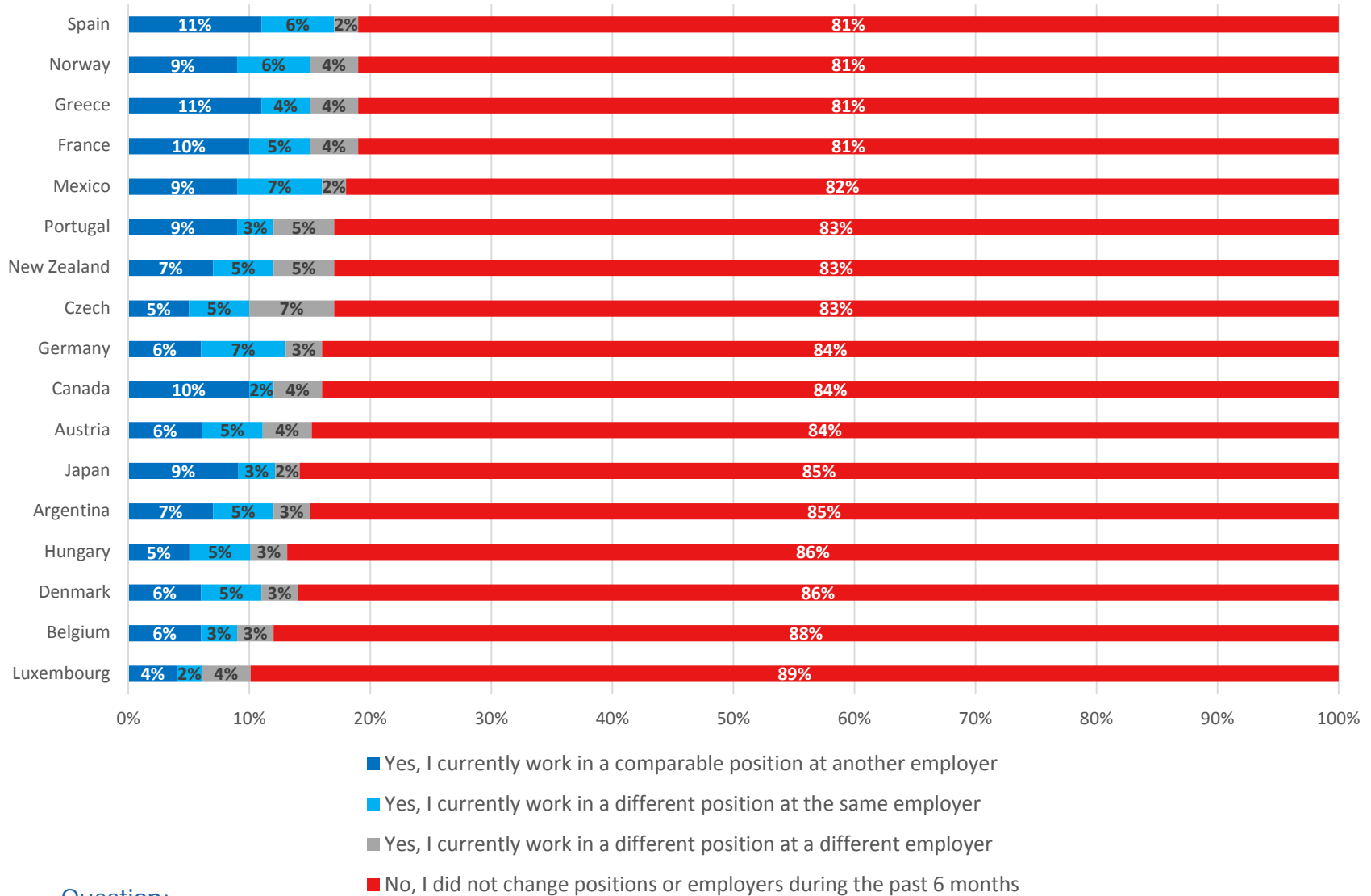
Job change increased in Australia, Belgium, China, France, Germany, Hungary, India, New Zealand, Poland, Spain and the Netherlands.

In Hong Kong, Italy and Luxembourg the job change decreased compared to last quarter.

Question:

Have you changed jobs during the past six months?

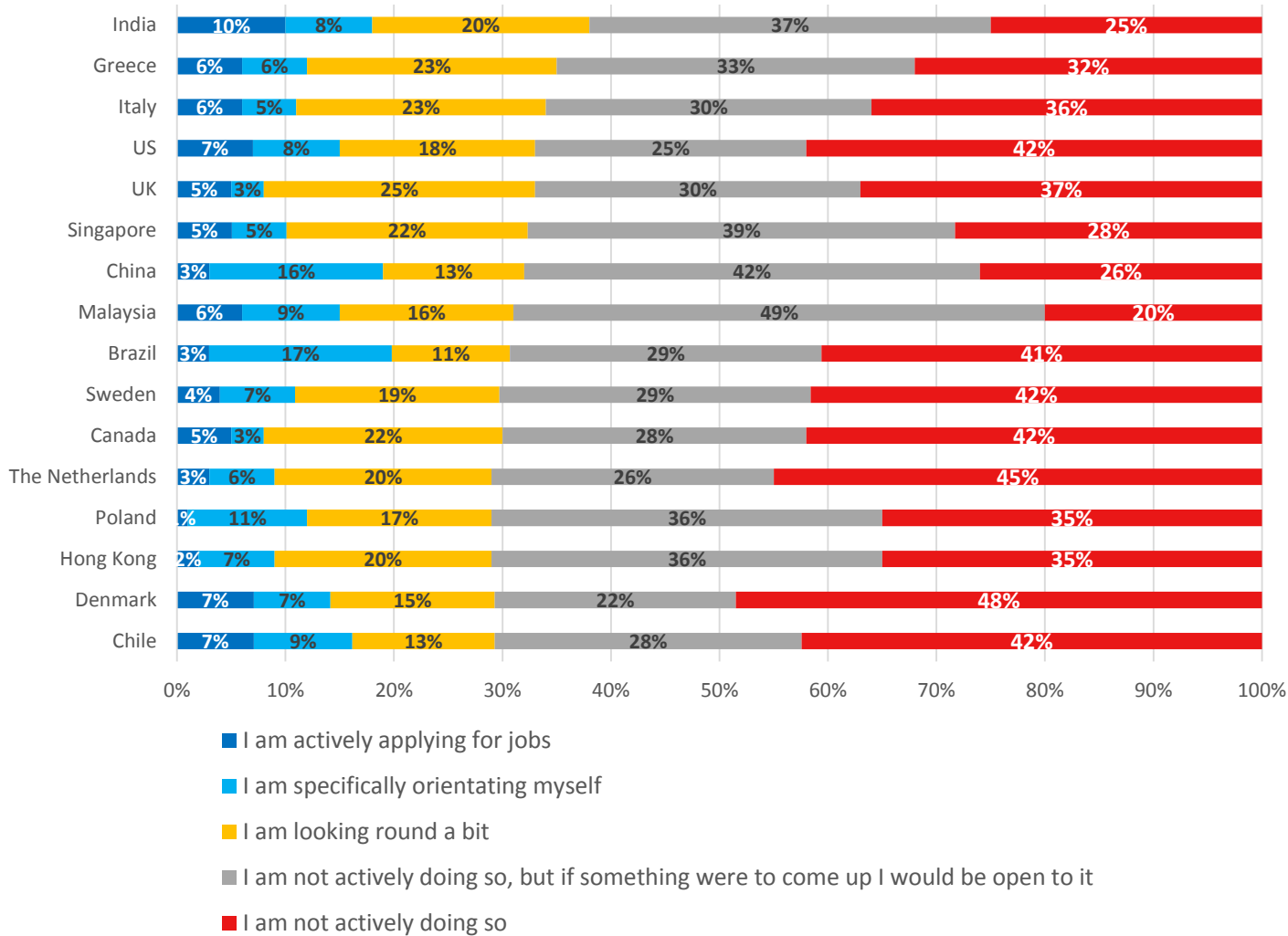
actual job change lowest in Luxembourg and Belgium



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

Job change appetite

India has highest appetite for job change



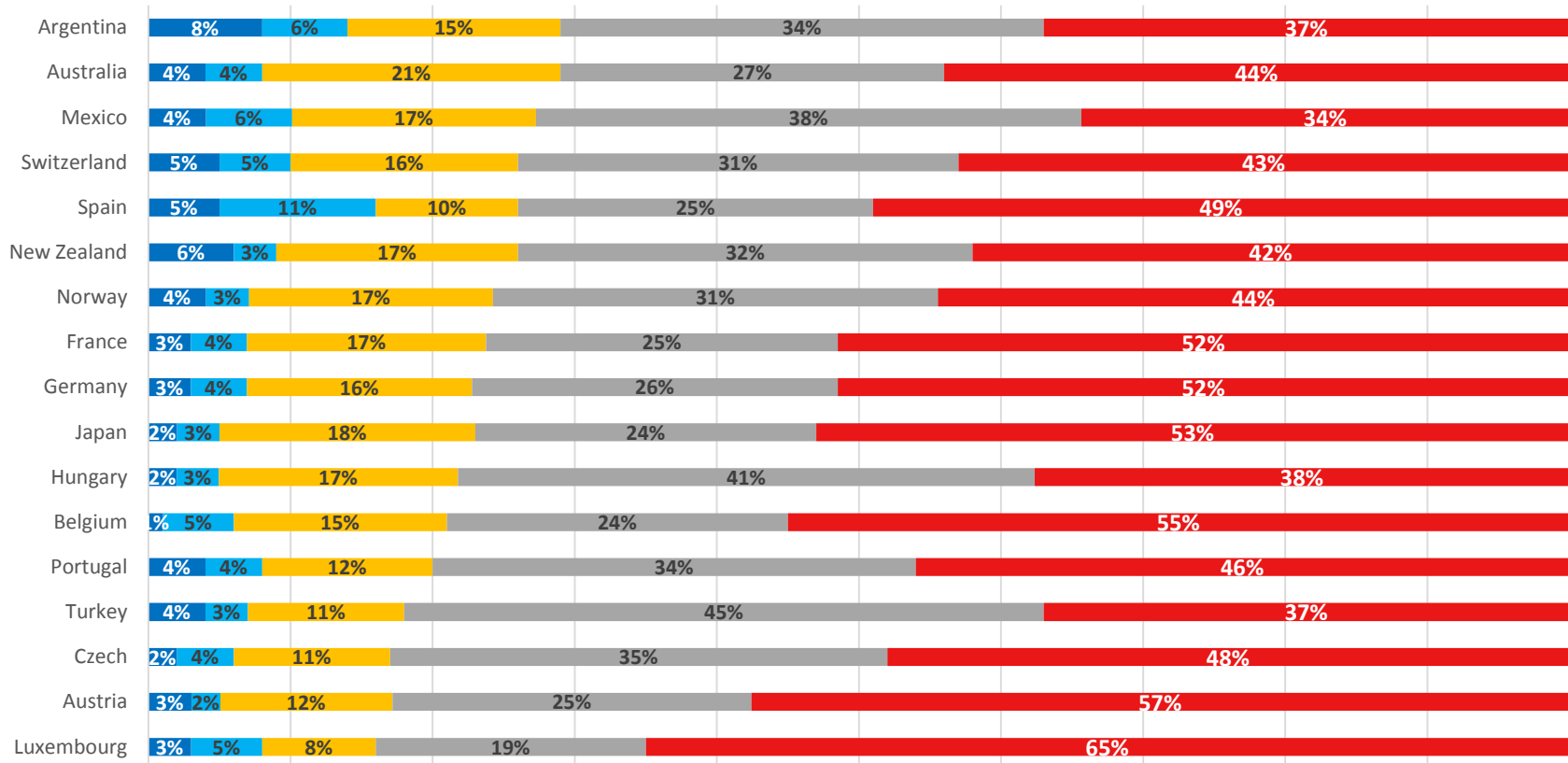
Compared to last quarter, the job appetite increased in China, Denmark, Greece, Hong Kong and Italy.

Australia, Belgium, Czech Republic, Germany, Hungary, India, Malaysia, Poland, Switzerland and the US show a decrease in appetite compared to last quarter.

Question:

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

Luxembourg lowest appetite for job change



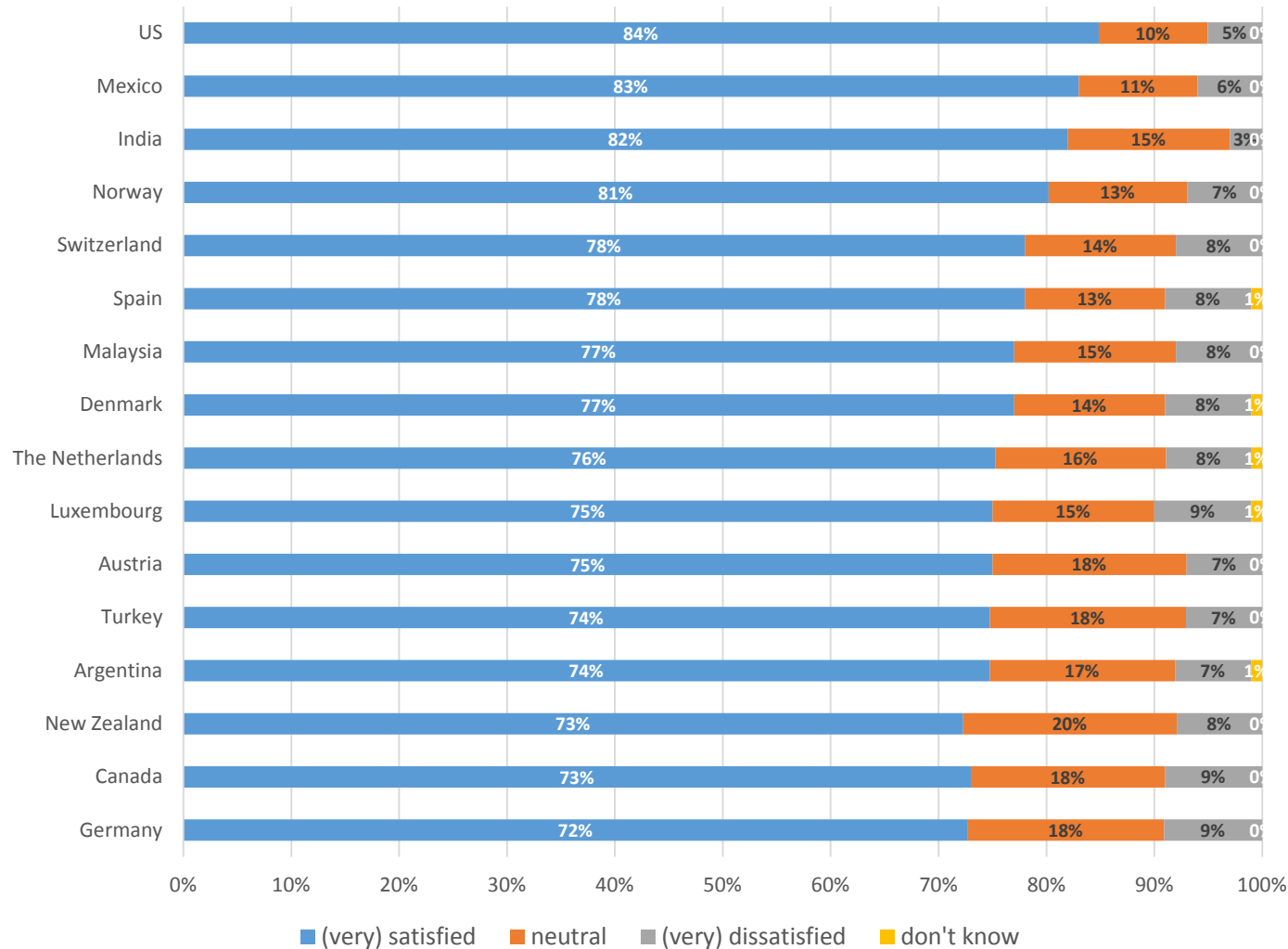
- I am actively applying for jobs
- I am specifically orientating myself
- I am looking round a bit
- I am not actively doing so, but if something were to come up I would be open to it
- I am not actively doing so

Question:

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

Job satisfaction

job satisfaction is highest in US and Mexico



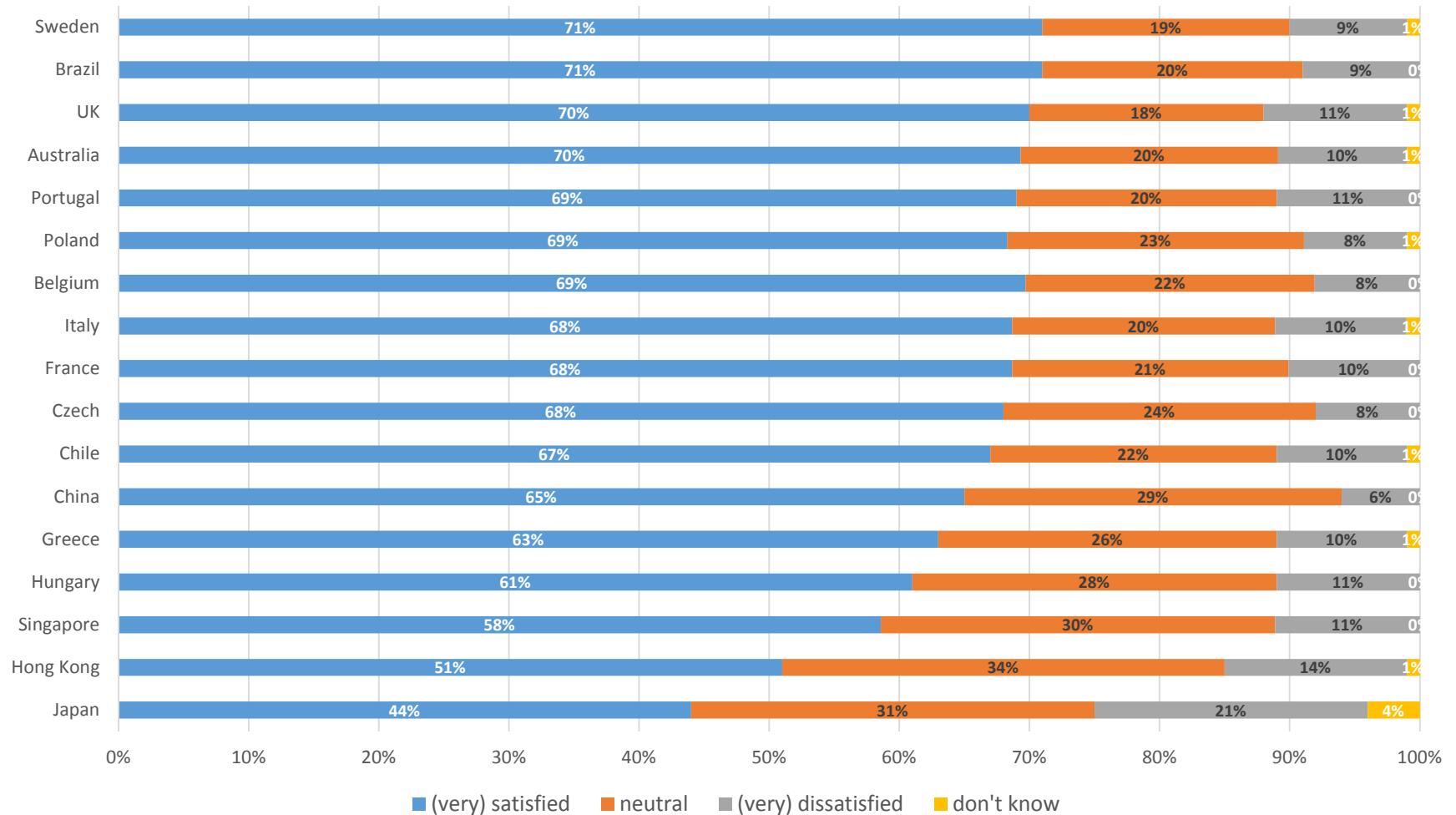
Compared to last quarter, the job satisfaction increased in Czech Republic and New Zealand.

The job satisfaction decreased in Australia, Brazil, Canada, Poland, Portugal, Singapore and UK.

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 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. Besides mobility, the survey addresses employee satisfaction and personal motivation as well as a rotating set of themed questions.

Background to Randstad Workmonitor (2)

- The study is conducted online among employees aged 18-65, working a minimum of 24 hours a week in a paid job (not self-employed). Minimum sample size is 400 interviews per country. The Survey Sampling International (SSI) panel is used for sampling purposes. The fourth survey of 2016 was conducted from October 26 till November 9, 2016 in the following countries:

Argentina	Denmark	Luxembourg	Sweden
Australia	France	Malaysia	Switzerland
Austria	Germany	Mexico	The Netherlands
Belgium	Greece	New Zealand	Turkey
Brazil	Hong Kong	Norway	UK
Canada	Hungary	Poland	US
Chile	India	Portugal	
China	Italy	Singapore	
Czech Republic	Japan	Spain	

contact information

Randstad Holding - Group Marketing & Communications

+31 (0)20 569 56 23

corporate.communications@randstadholding.com

media enquiries

Saskia Huuskes/Machteld Merens

saskia.huuskes@randstadholding.com

machteld.merens@randstadholding.com

+31 (0)20 569 17 32

research

José Ortiz

jose.ortiz@randstadholding.com

+31 (0)20 569 19 37

volgende slides uit presentatie laten

49% expect the economic situation in their country to deteriorate in 2017

