

healthy employees perform better

incl. quarterly mobility, confidence & job satisfaction

Randstad Workmonitor
Global Graphs & Slides, wave 1 2014

Randstad Holding nv

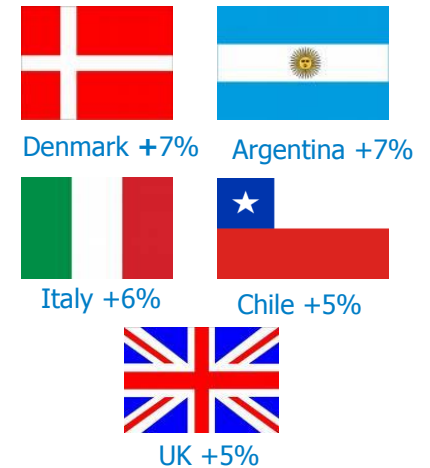
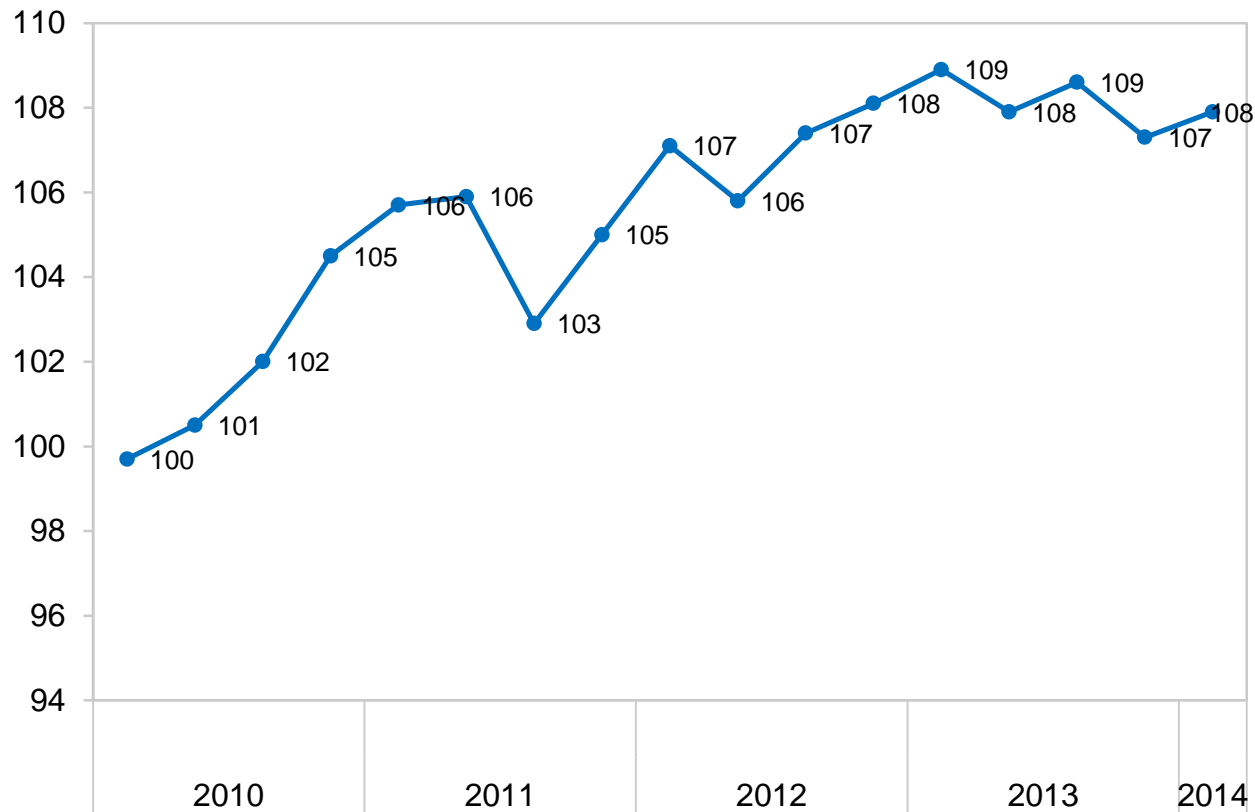
March 2014



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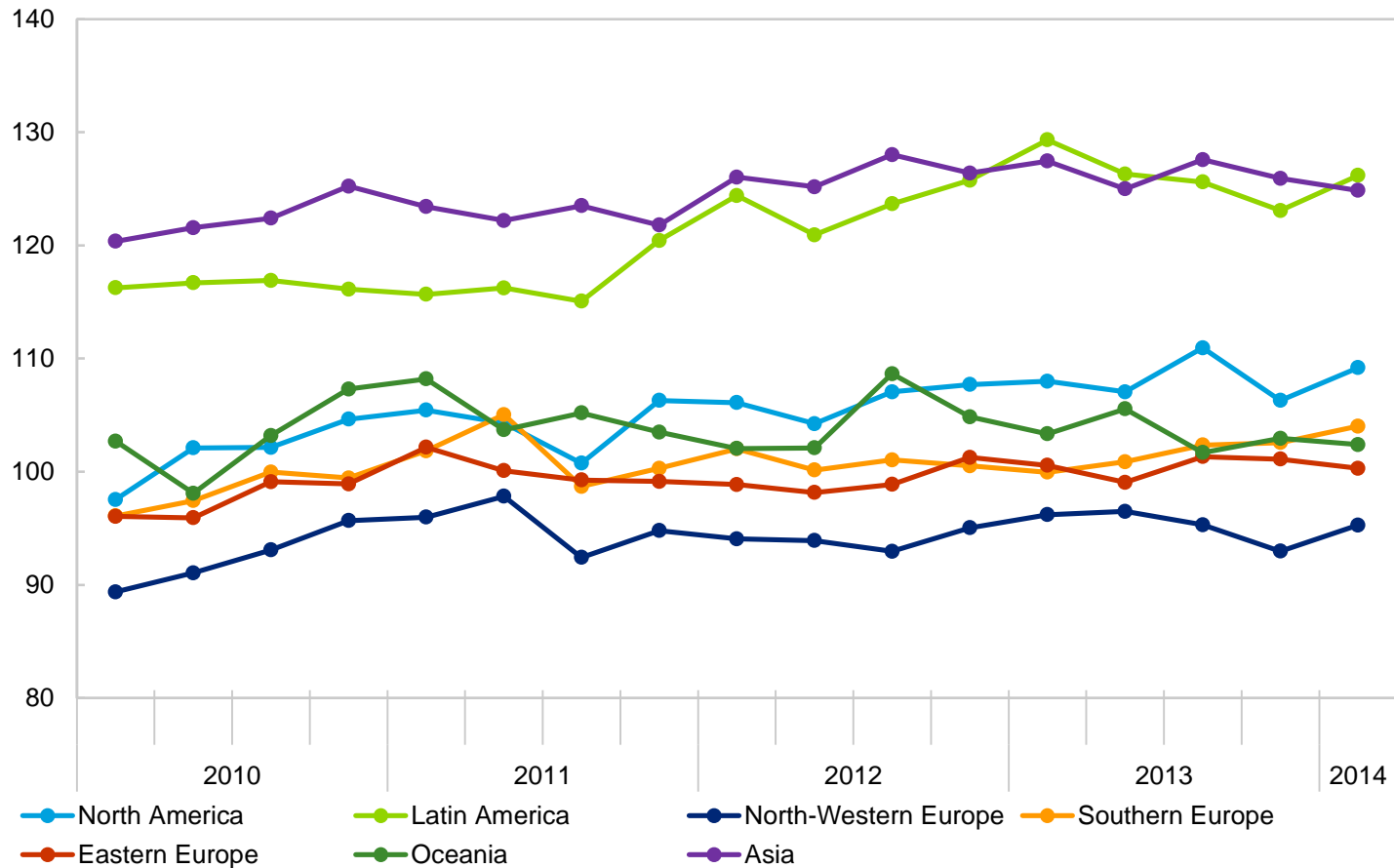
Mobility Index flat at 108



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?

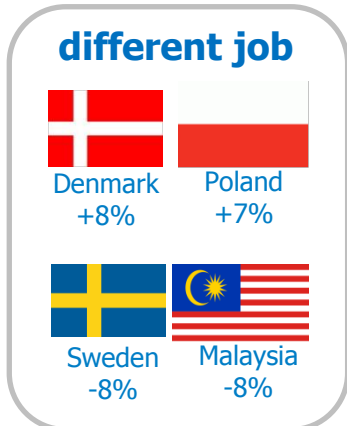
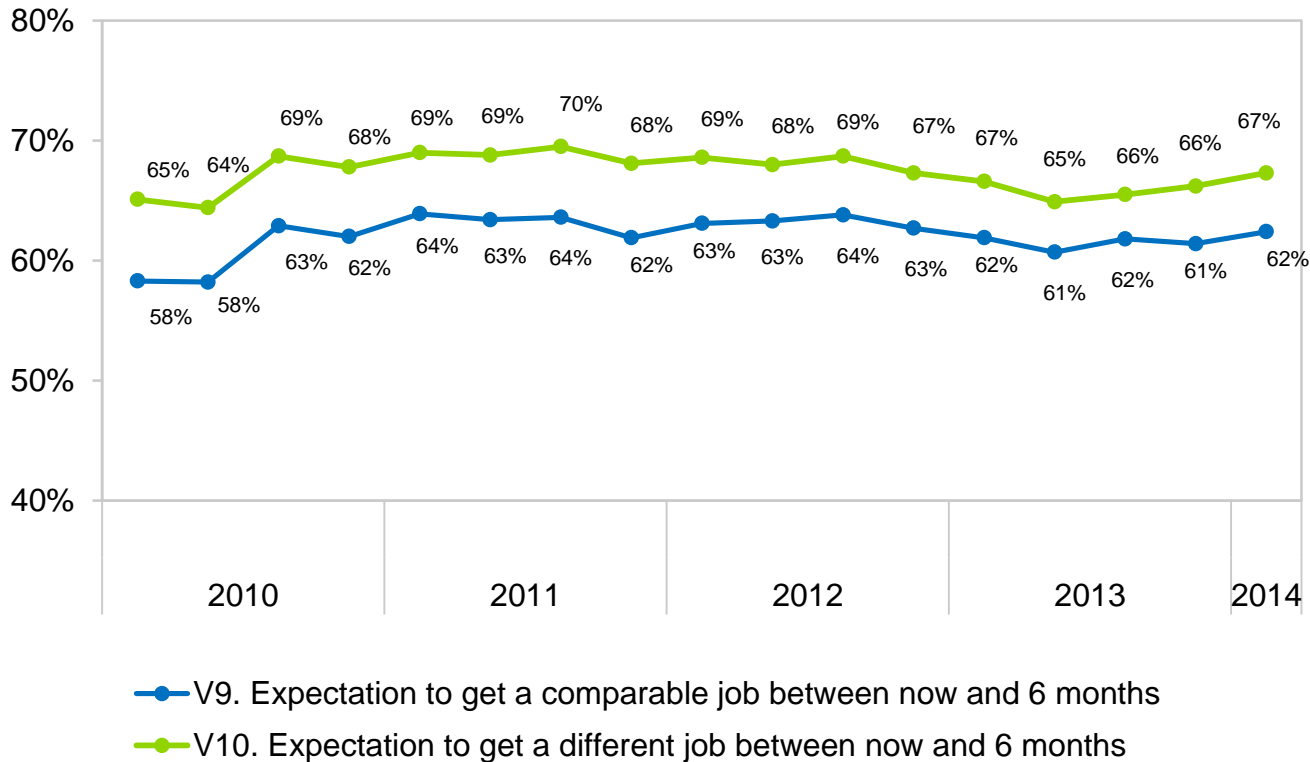
regional differences in mobility



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?

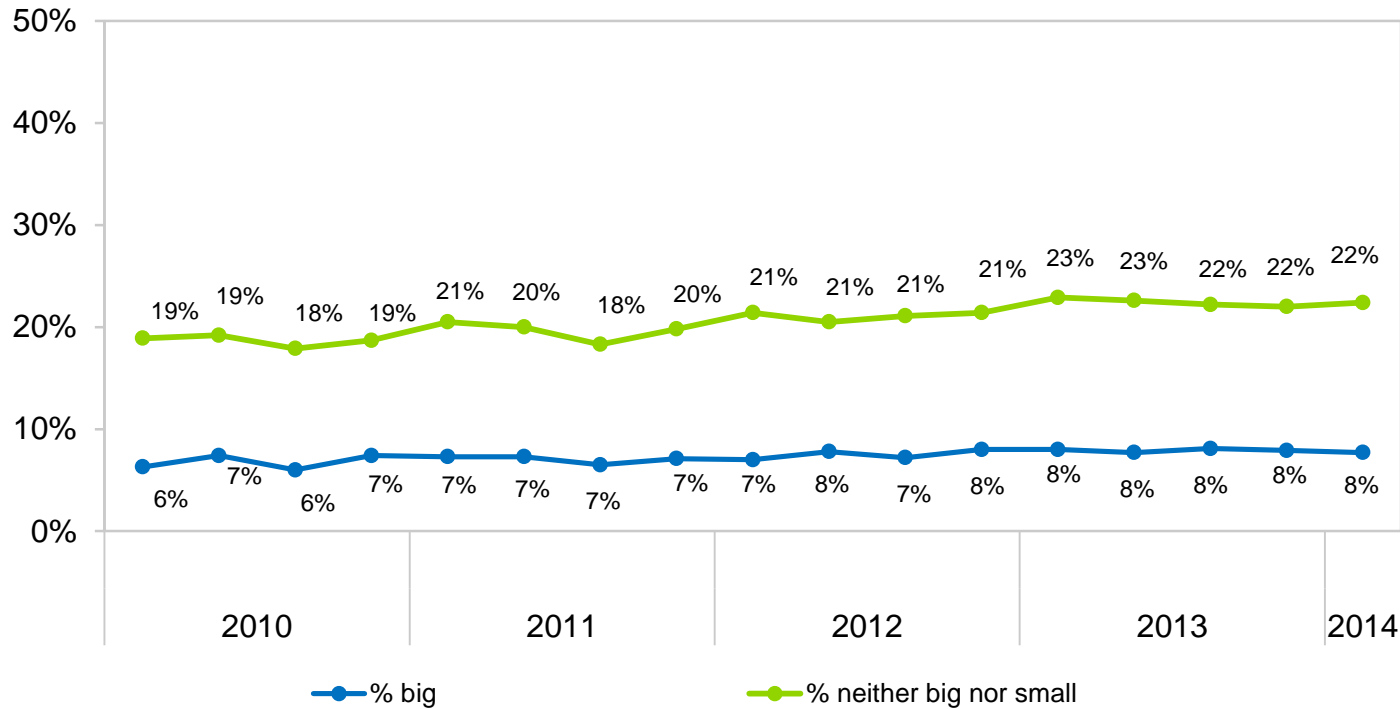
employee confidence is stable




Question:

- Suppose you had to look for a new job now with a different employer. Do you think you could get similar work with a different employer within the next 6 months?
- And do you think you could get different work with a different employer between now and 6 months?



fear of job loss at 8%



big



China +4%

Czech -3% New Zealand -3%

neither big nor small



Australia +6%

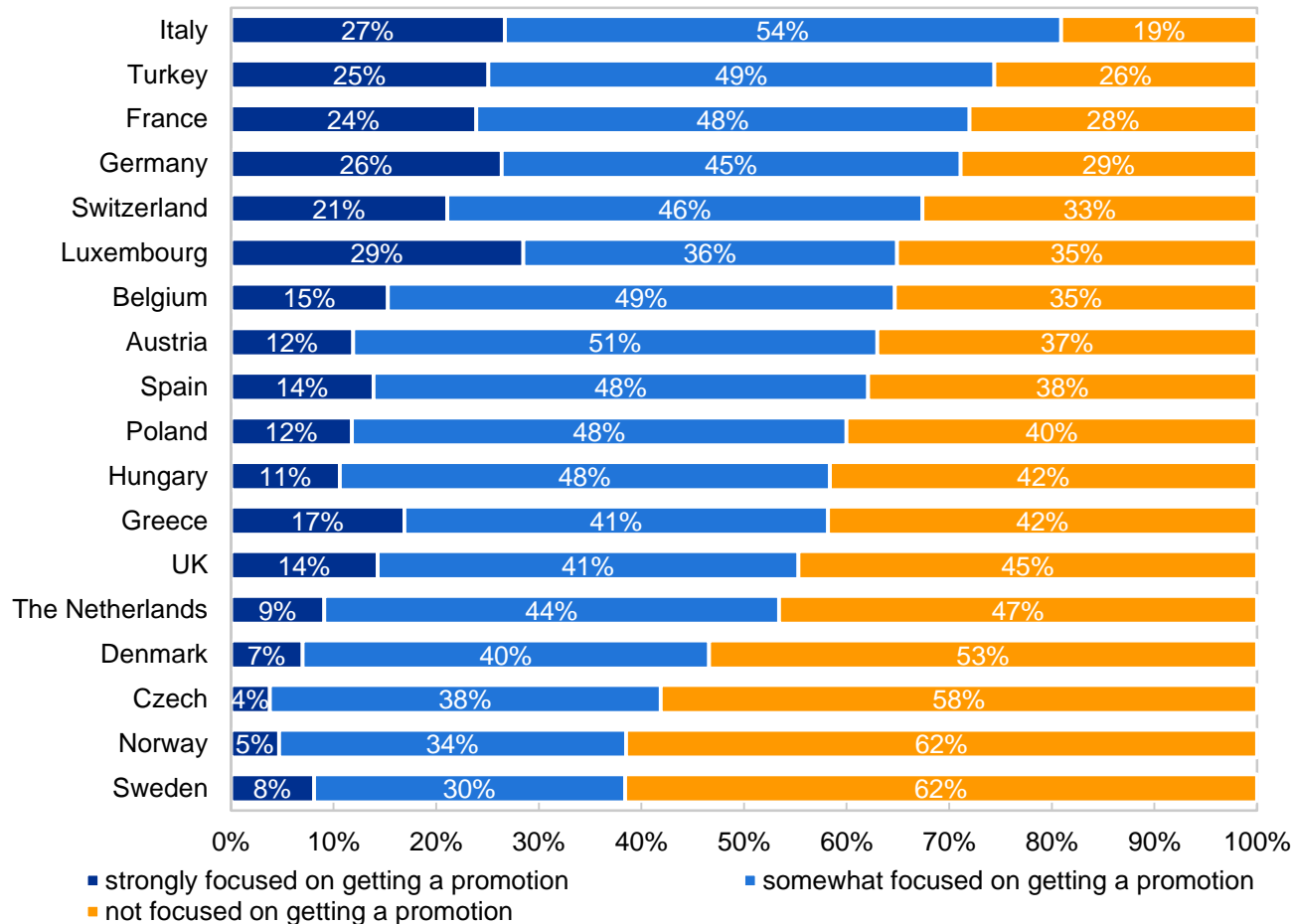


Malaysia -6%

Question:

- How great is the risk of you losing your job or that your contract will not be extended within the next 6 months?

Europe: focus on promotion high in Italy and Turkey



Denmark
+12%

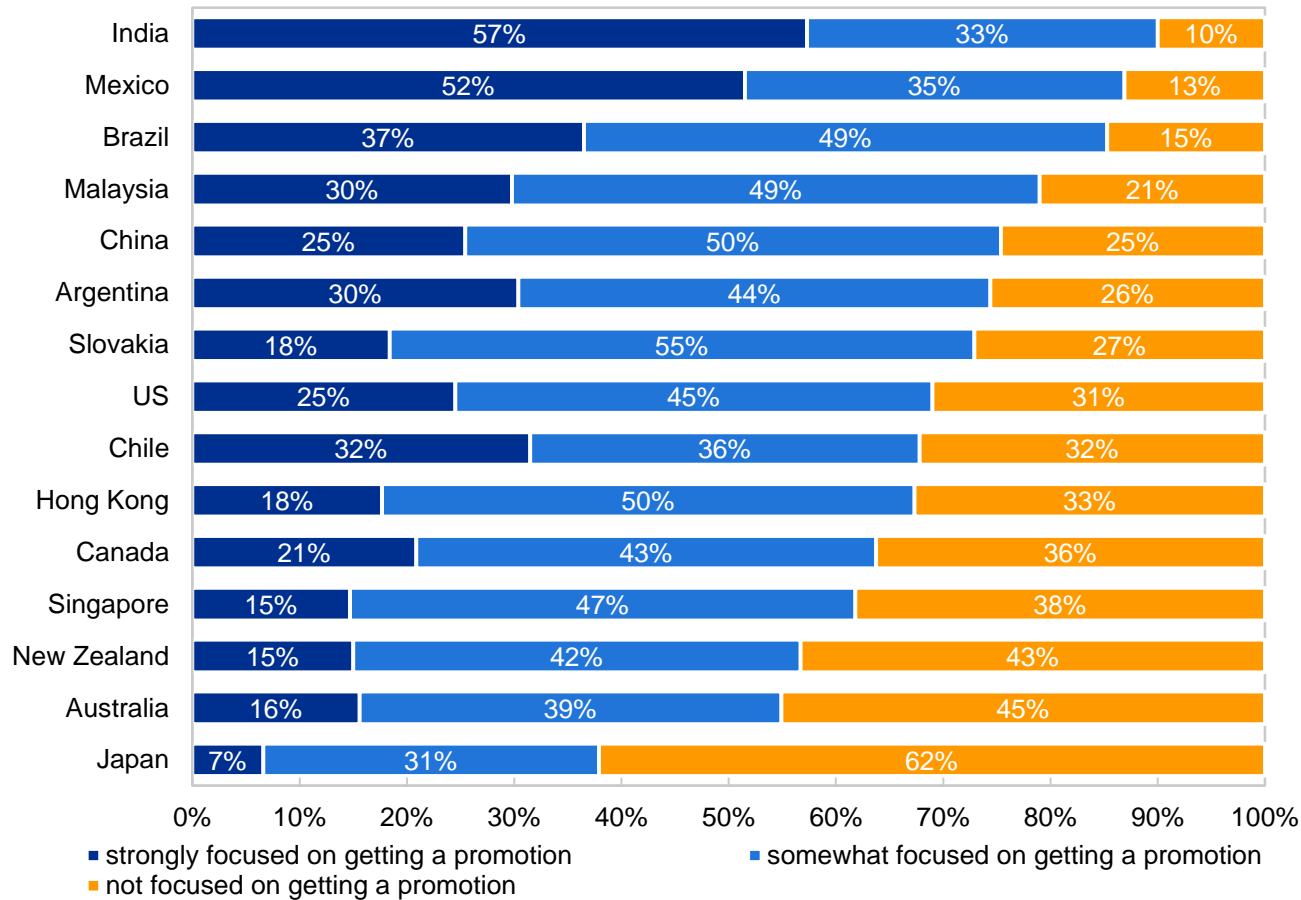


Spain
+7%

Question:

- To what extent are you focussed on getting a promotion?

focus on promotion high in India, Mexico and Brazil

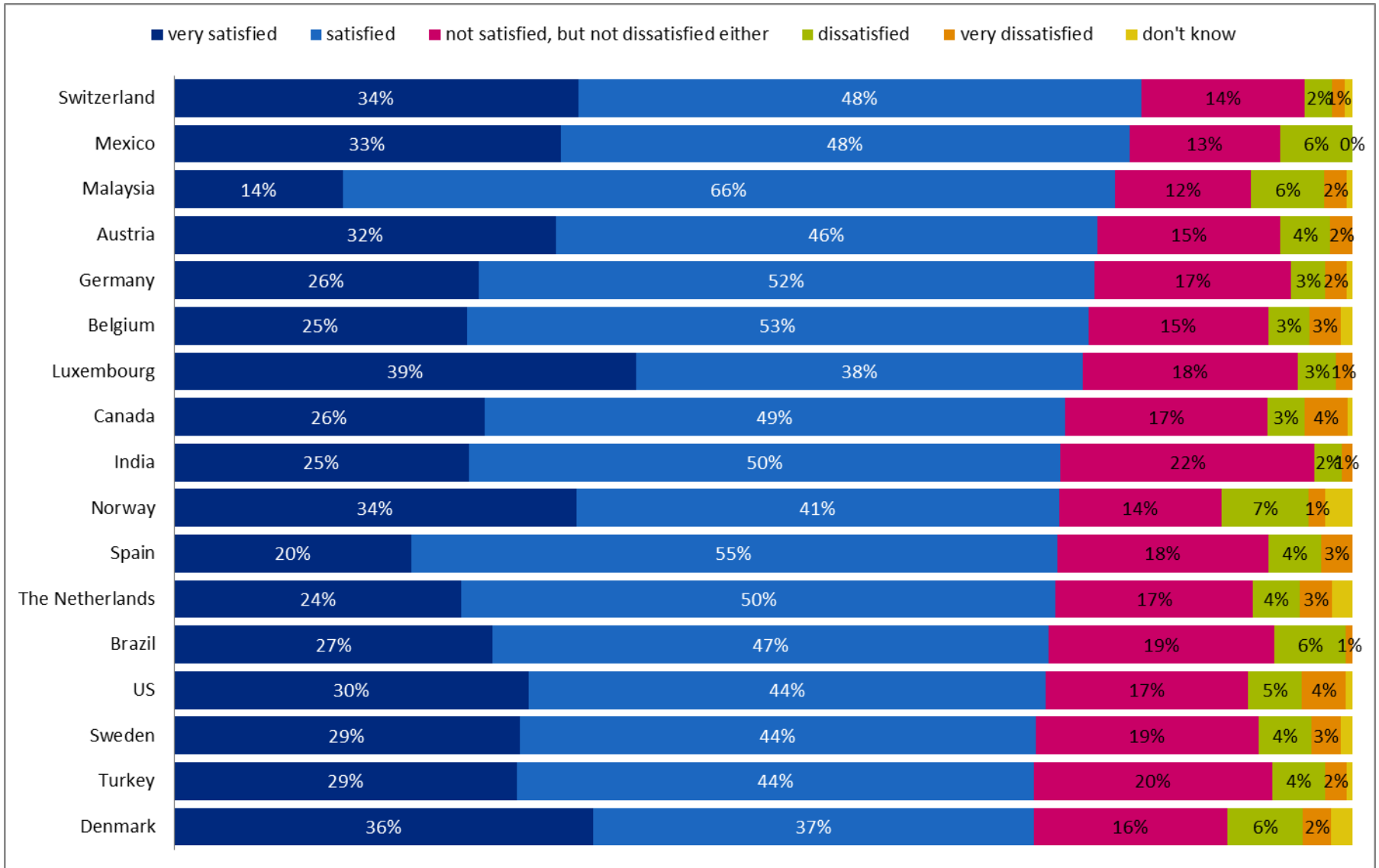


USA +6%

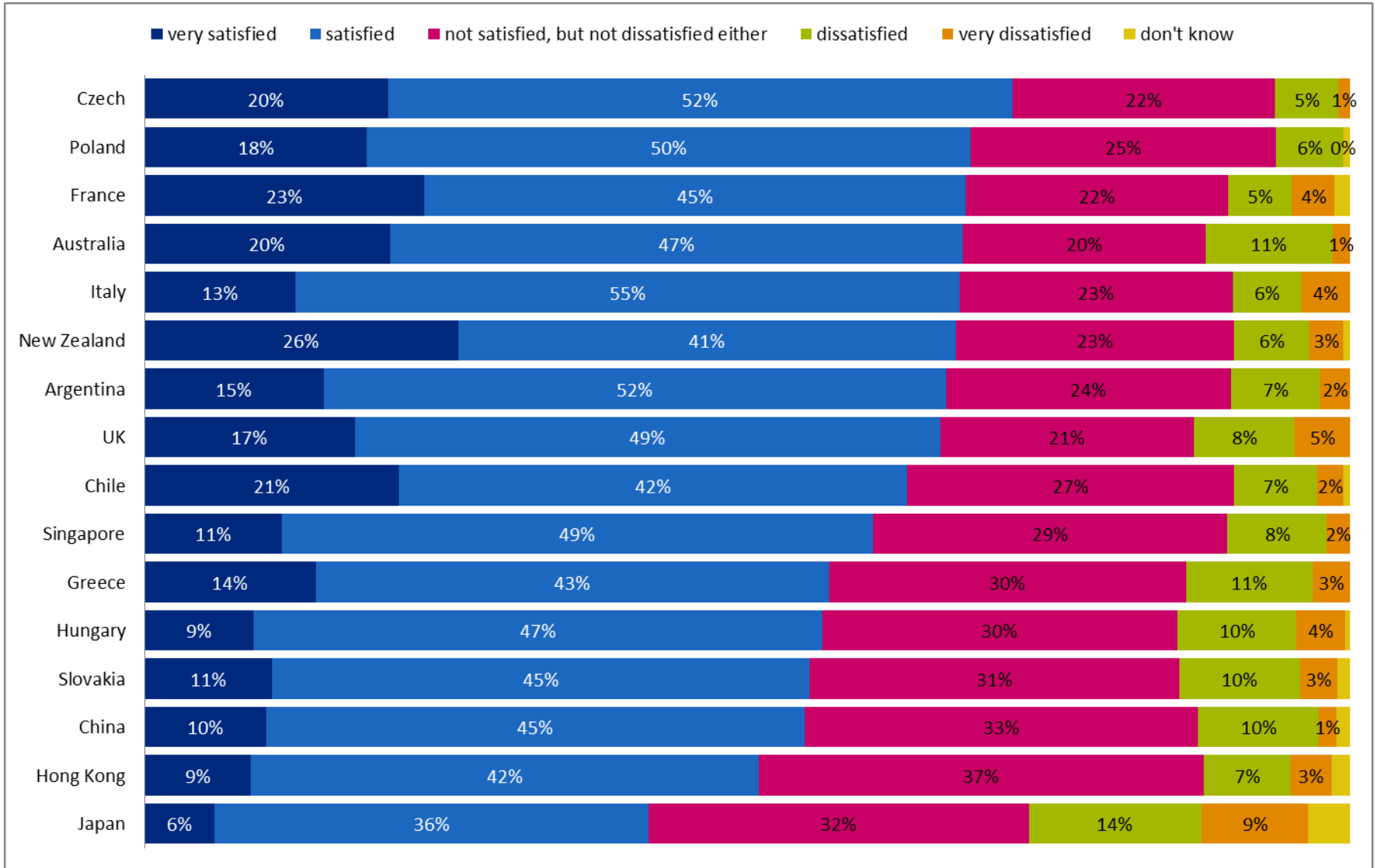
Question:

- To what extent are you focussed on getting a promotion?

satisfaction 1 (ranked from high to low)



satisfaction 2 (ranked from high to low)

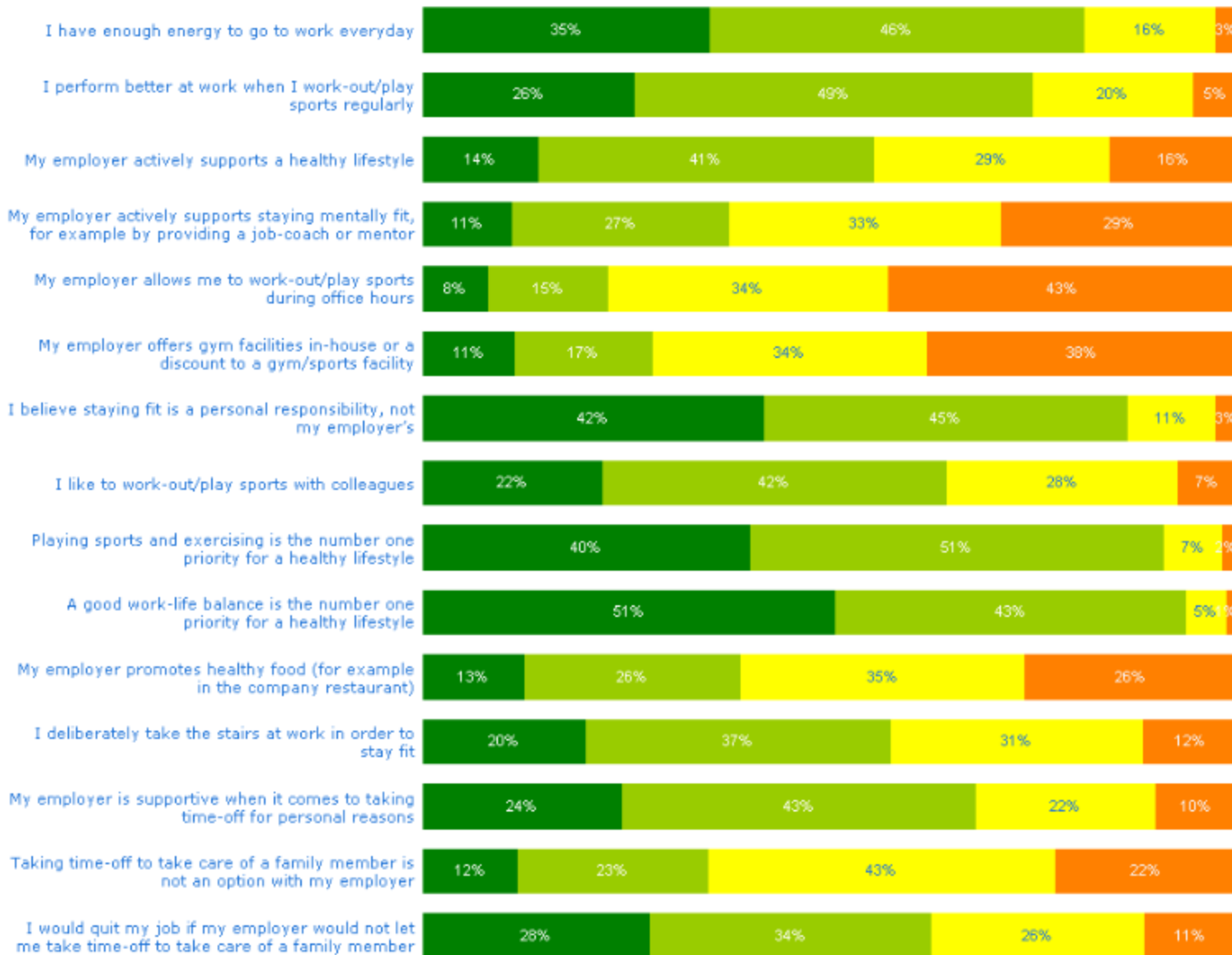


Argentina



Argentine employers support a healthy lifestyle, but do not contribute to sports and healthy food for their employees

- Half of the Argentines (55%) have an employer who actively supports a healthy lifestyle. A quarter of the employers (28%) offer gym facilities in-house or a discount to a gym/sports facility. Furthermore only one third (39%) promotes healthy food.
- The vast majority (91%) of the Argentines believe that playing sports and exercising is the number one priority for a healthy lifestyle. Two thirds of the Argentines (64%) like to play sports with colleagues.



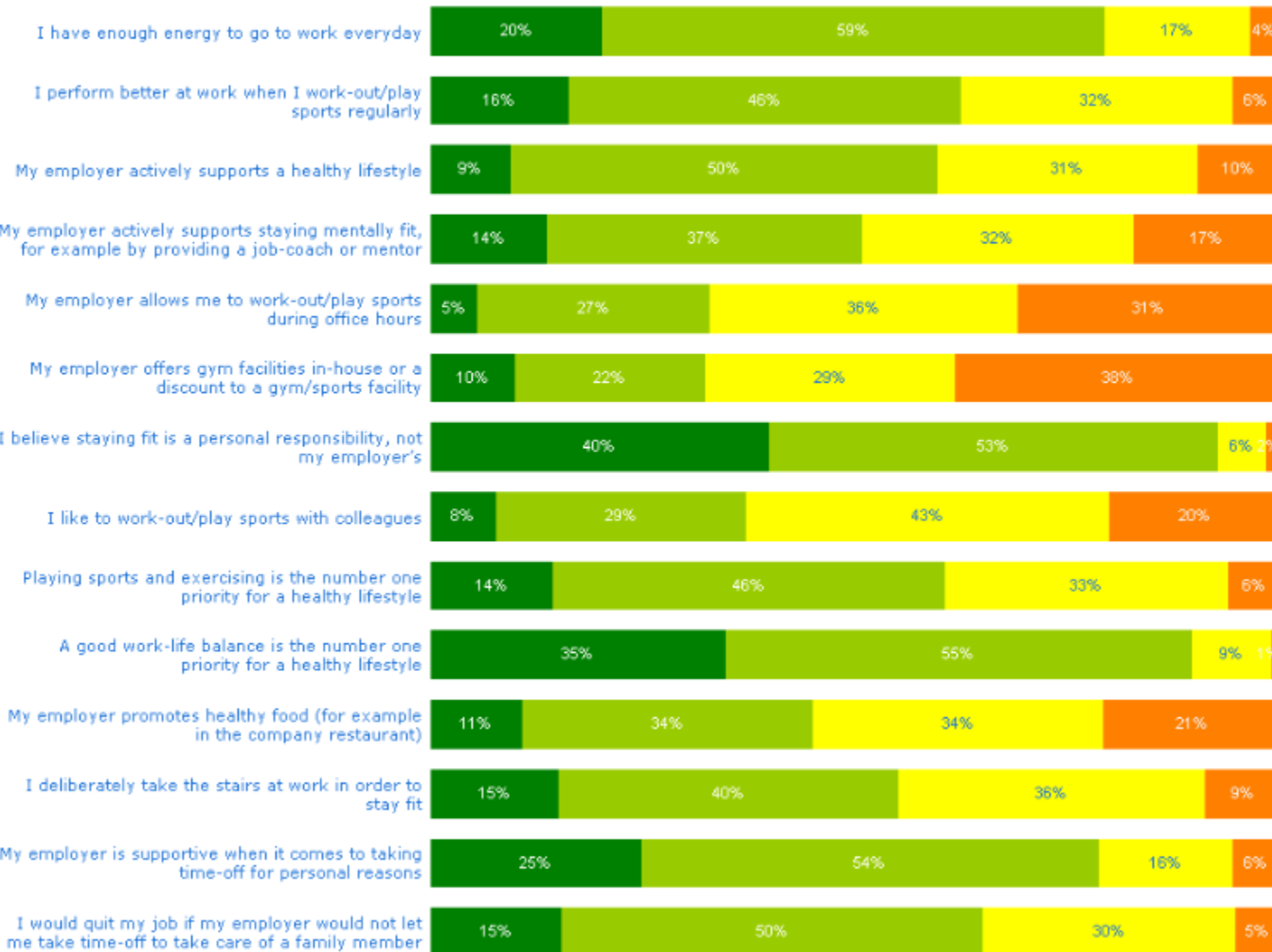
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Australia



Playing sports is important for Australians, a third of them likes to play sports with colleagues

More than half of the Australians (60%) believe that playing sports is the number one priority for a healthy lifestyle. Even though Australians are quite sportminded, their colleagues do not seem to be their first choice as sportmates. 63% does not like to work-out or playing sports together with their colleagues.



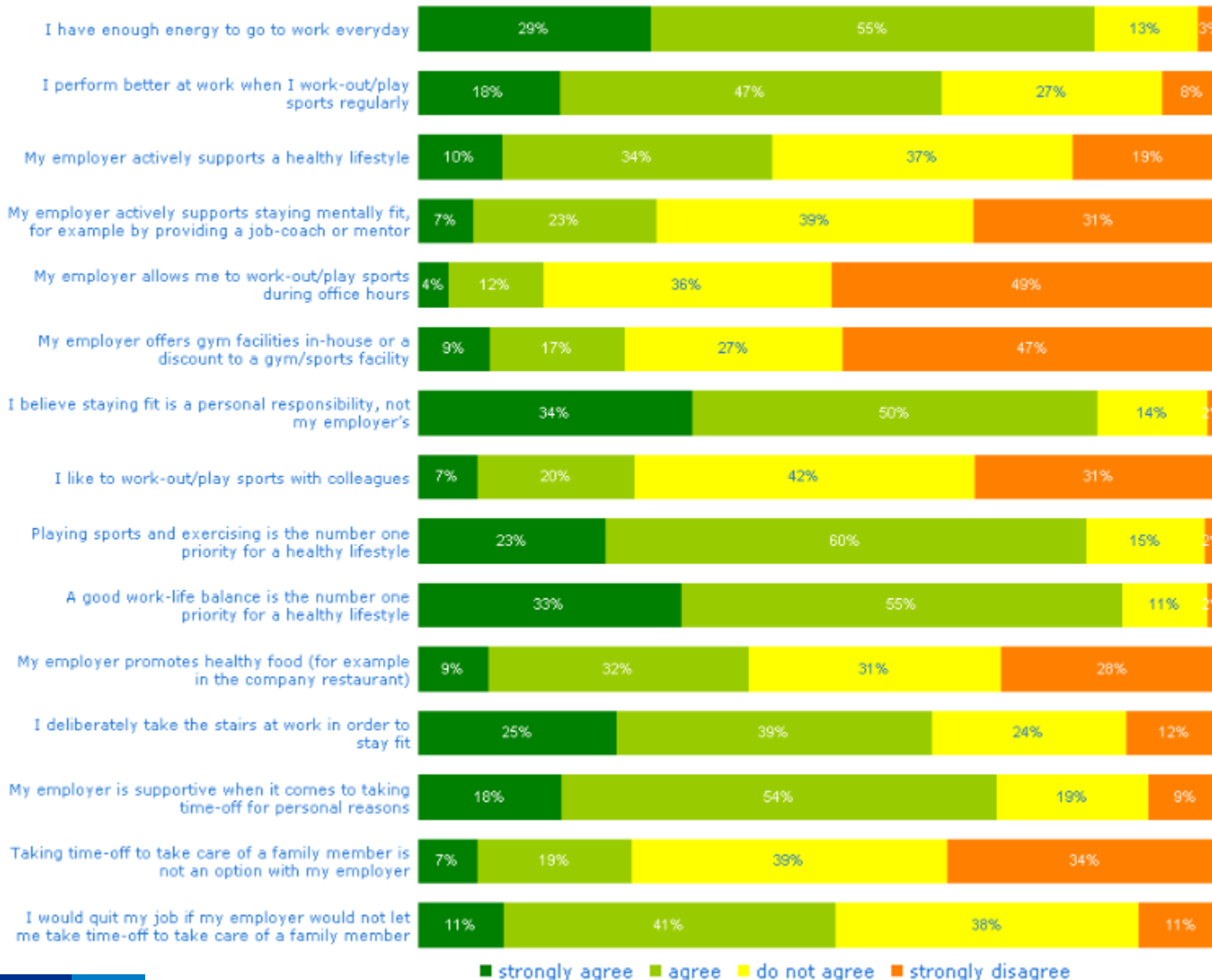
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Austria



Austrian employees do not like to play sports with colleagues

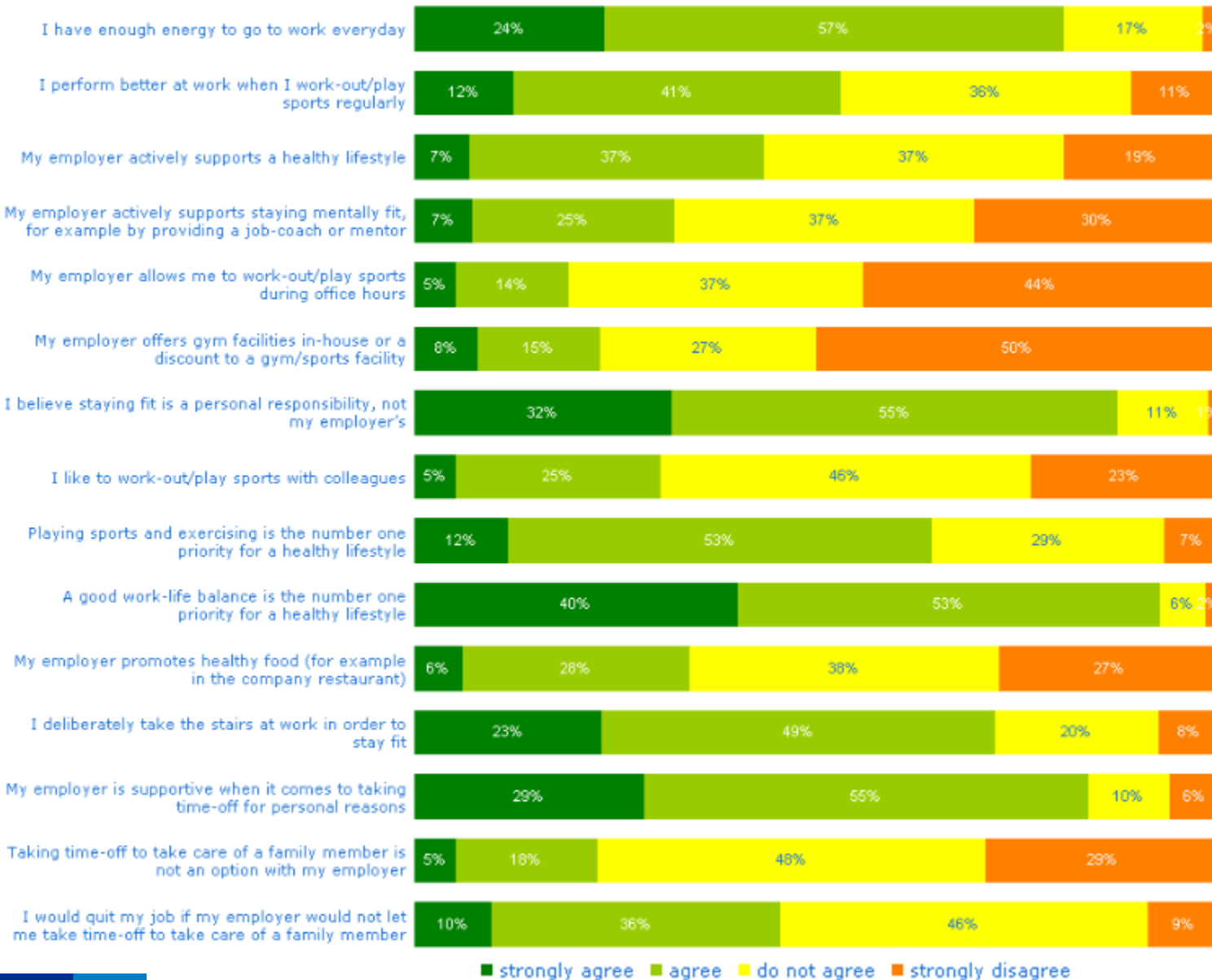
- Only 44% of the Austrians think their employer is supportive when it comes to a healthy lifestyle. Austrians are not often allowed to play sports during office hours (16%) and not many employers offer a discount to a gym/sports facility (26%).
- Austrians recognize the importance of playing sports and exercise (83%), but their colleagues are not their first choice as sportmates (73% do not agree with the statement).



Belgium



For Belgians a good work-life balance is essential to live a healthier life



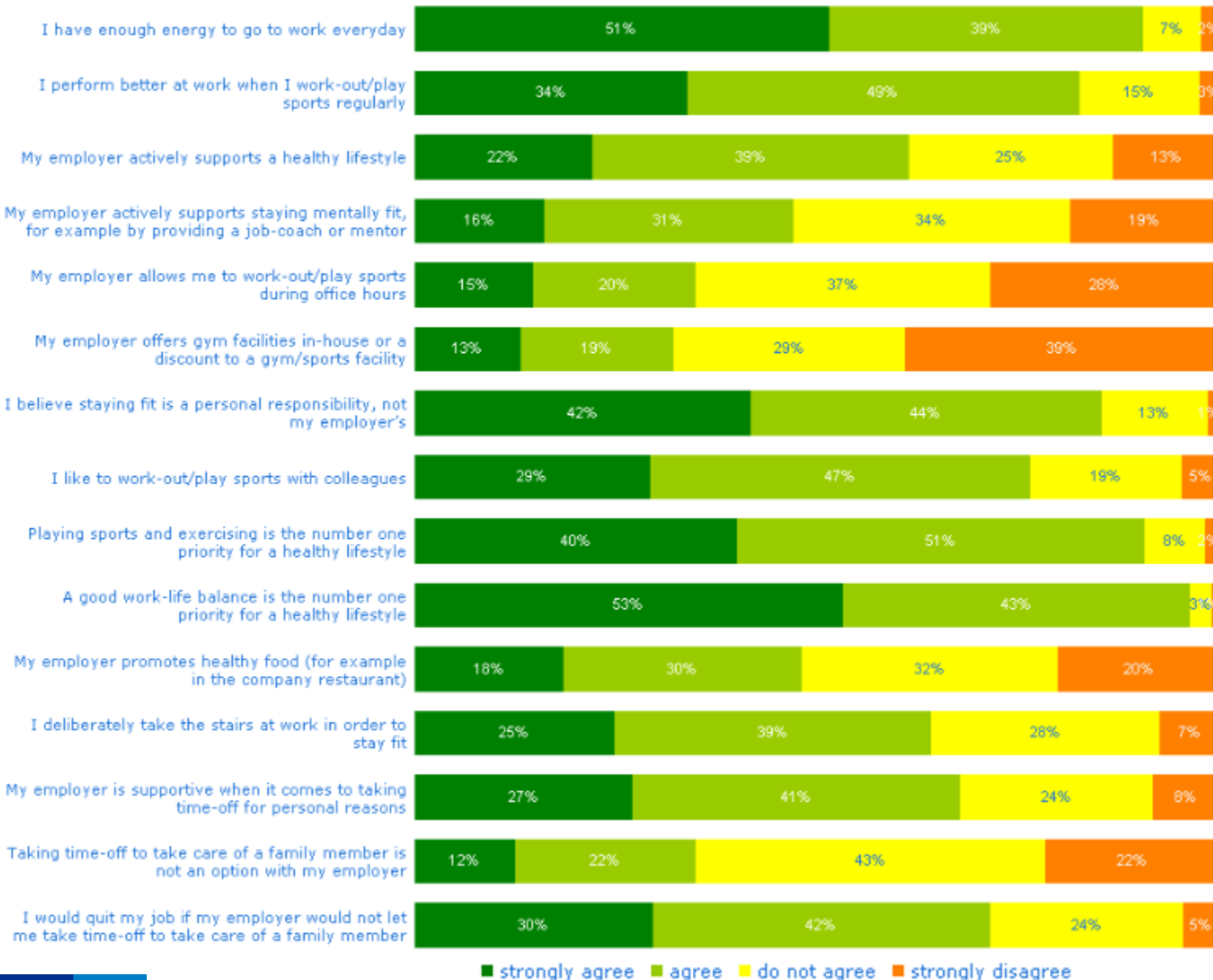
- Half of the Belgians (53%) say they perform better at work when they work-out or play sports regularly. About a quarter of the employers (23%) offer gym facilities in-house or discount to a sports facility.
- The vast majority (93%) of the Belgians believe that a good work-life balance is the number one priority for a healthy lifestyle, while six out of ten Belgians (65%) state that playing sports is of crucial importance to stay healthy.

Brazil



Brazilians recognize the importance of playing sports to stay healthy

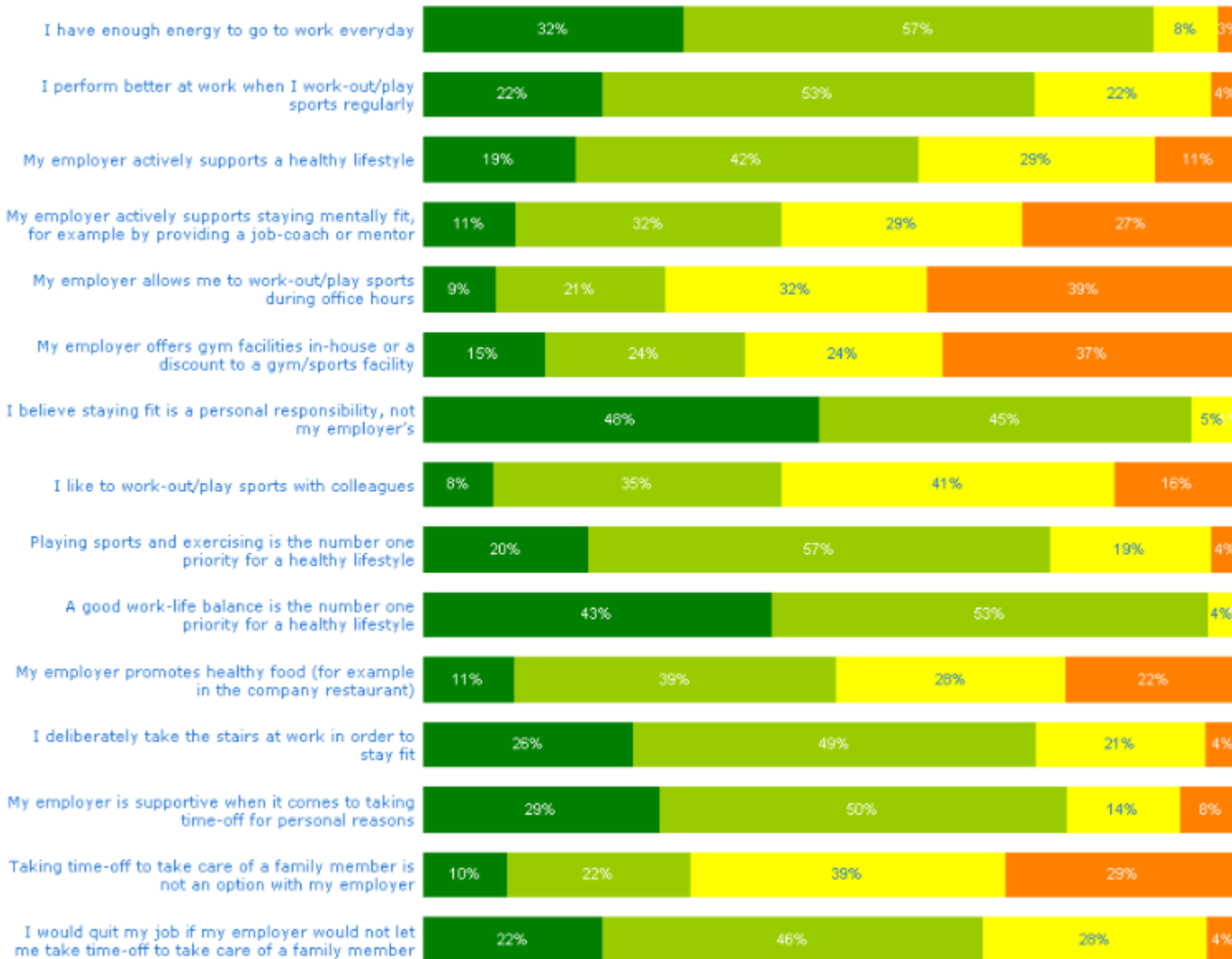
- Brazilians have enough energy to go to work everyday (90%). To perform better at work, they find it important to work-out or play sports regularly (83%).
- Most Brazilians (76%) like to work-out/play sports with colleagues. One third of the Brazilian employers (35%) allow their employees to work-out or play sports during office hours.



Canada



Canadians are aware of their responsibility to stay fit



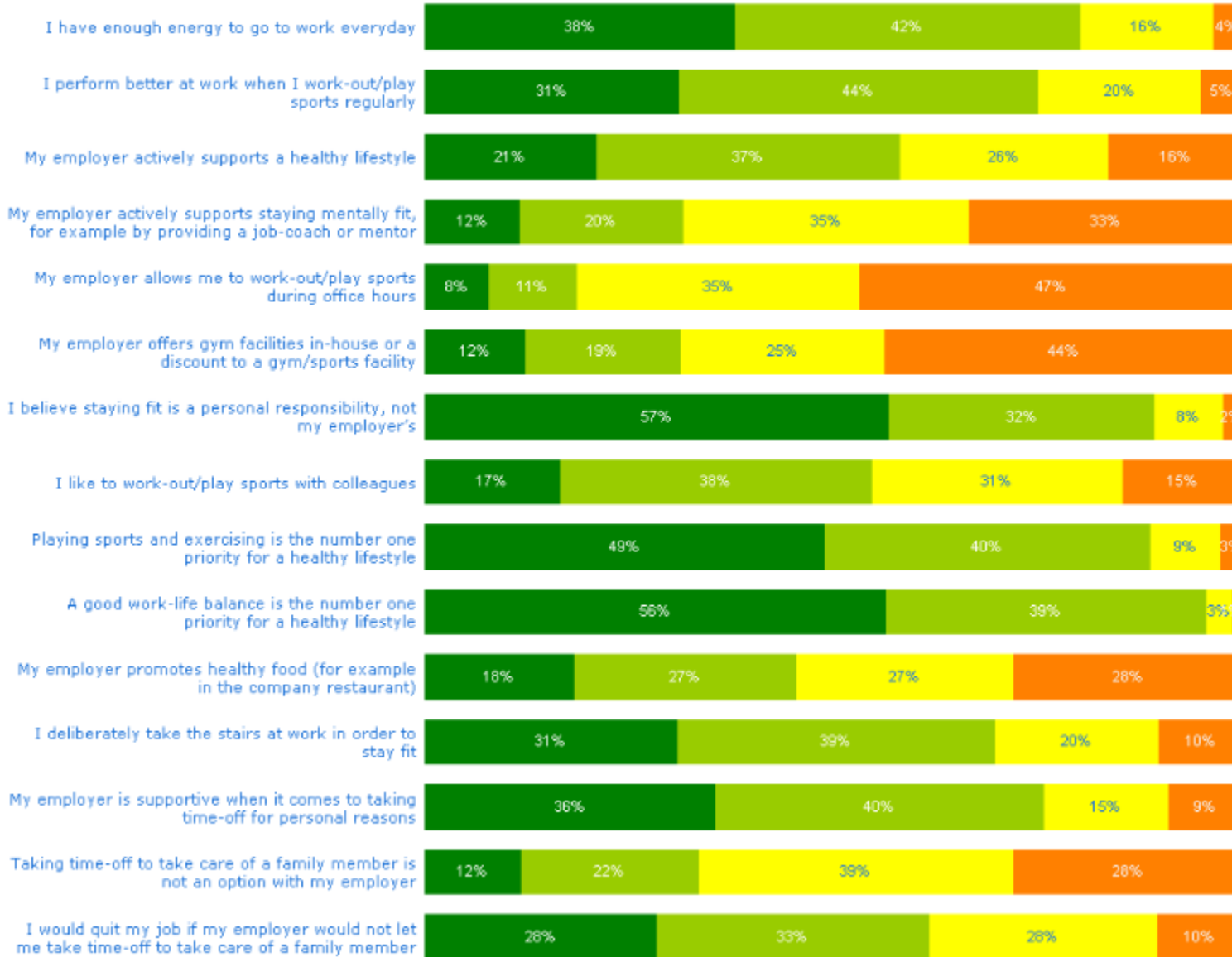
- The vast majority (93%) of the Canadians believe that staying fit is a personal responsibility and not your employer's.
- Most Canadian employees say their employer is supportive when it comes to taking time for personal reasons (74%), also if the time-off is needed to take care of a family member (68%).
- However more than two thirds of the Canadians (68%) would quit their job if their employer would not let them take time off to take care of a family member.

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Chile



Chileans believe that playing sports is crucial to live healthy



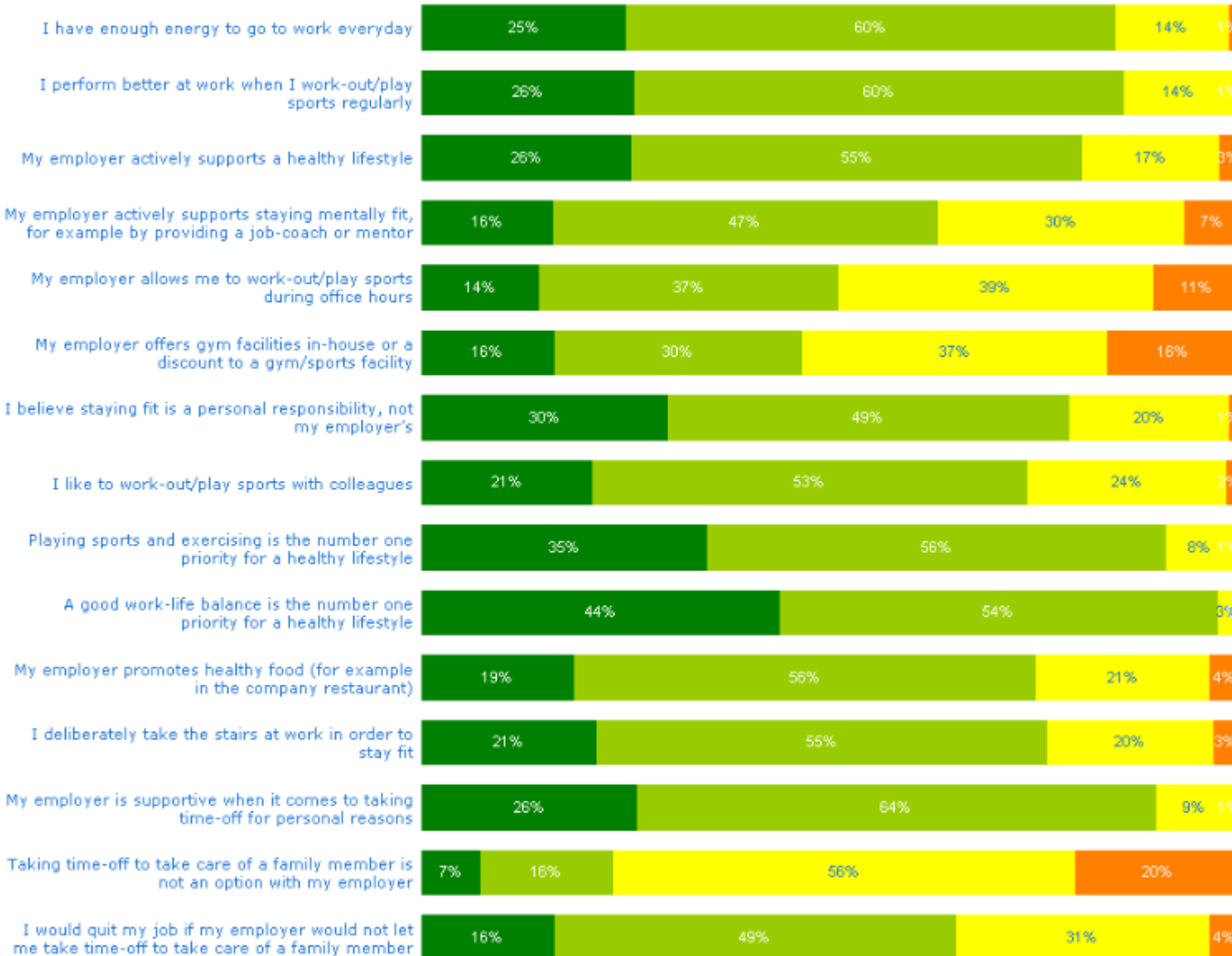
- Most of the Chileans (89%) believe that playing sports and exercising is the number one priority for a healthy lifestyle. Unfortunately Chileans are not allowed to play sports during office hours (only 19% is allowed).
- However, playing sports during office hours is not very common in Chile, only 19% is allowed.

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

China



Chinese employers support their employees to live healthy



- Chinese employees are positive about their employer. Most of the Chinese employers (81%) support a healthy lifestyle; more than half of the employees are allowed to play sports/work out during office hours and employers encourage healthy food (75%).
- Chinese employees like to play sports or work out with colleagues (74%).

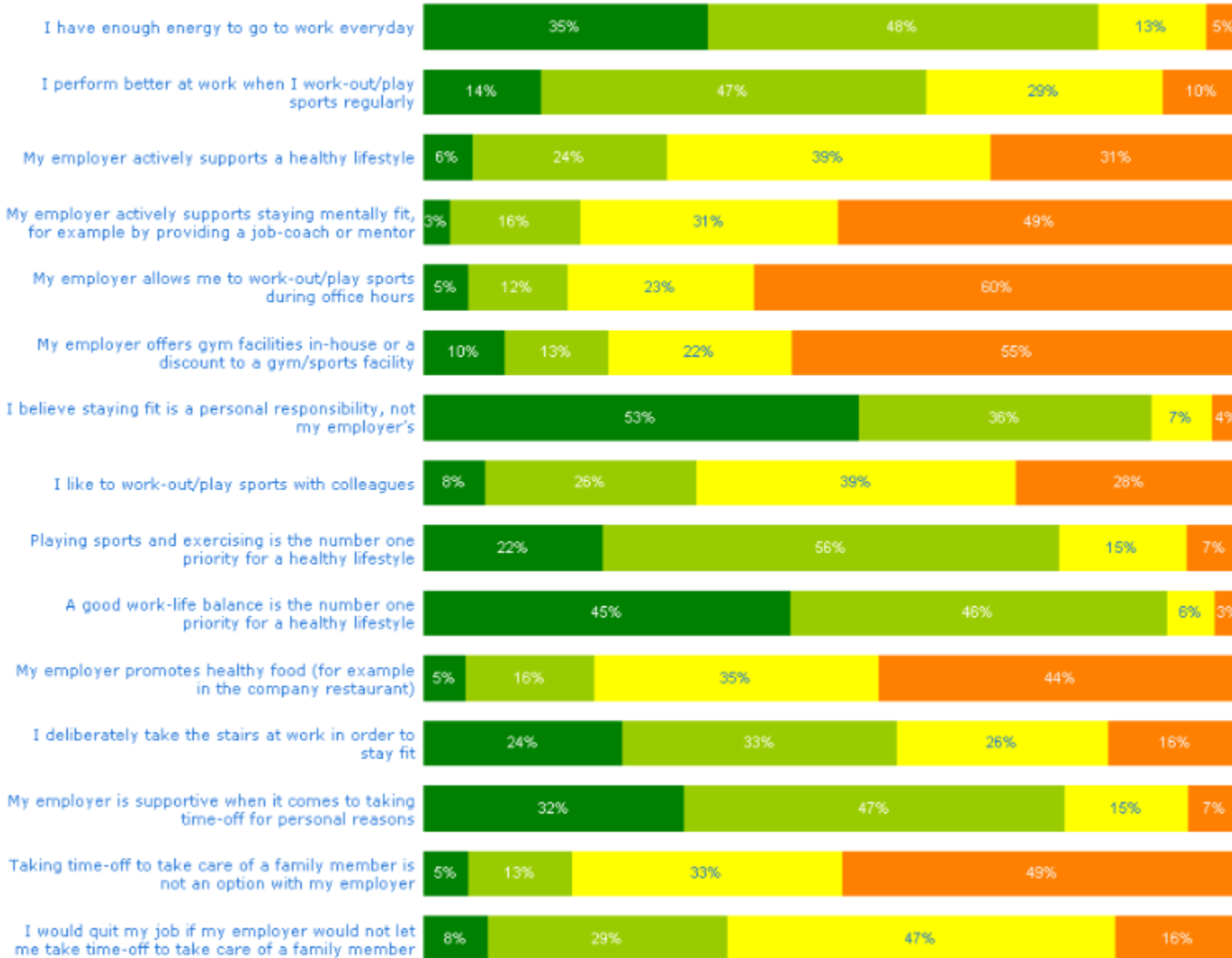
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Czech Republic



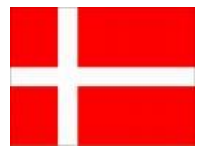
Czechs have enough energy to go to work everyday

- Czech employees have enough energy to go to work everyday; more than four out of five Czechs (83%) agree with this statement.
- Czechs believe that it is their own responsibility to stay fit; 91% say that it is a personal responsibility and not your employer's.



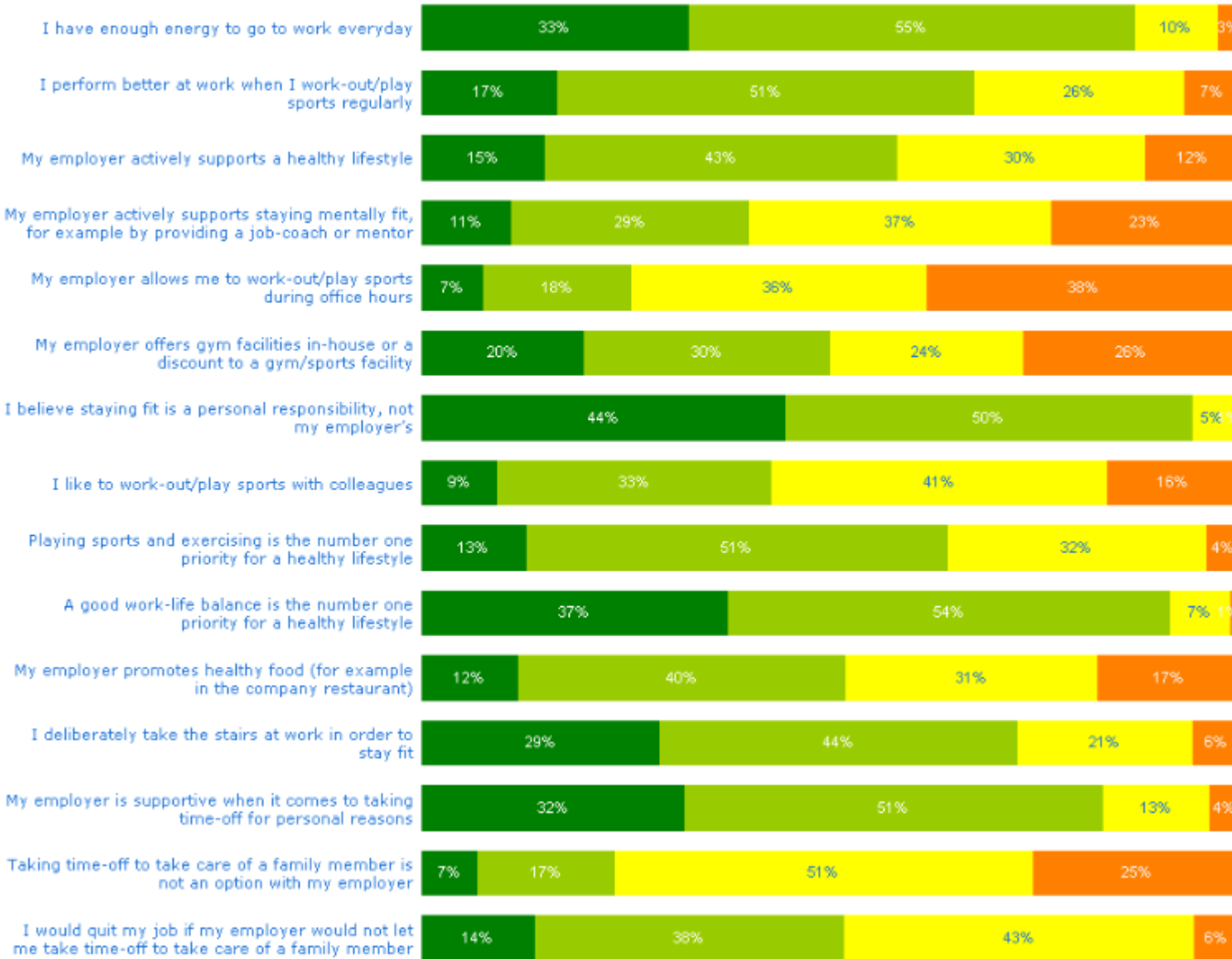
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Denmark



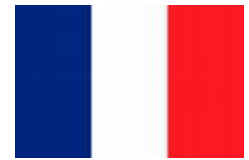
Danish employees believe that staying fit is their own responsibility

- The majority of the Danes (94%) believe that staying fit is a personal responsibility, not the employer's.
- For almost all Danish employees (91%) a good work-life balance is very important for a healthy lifestyle.

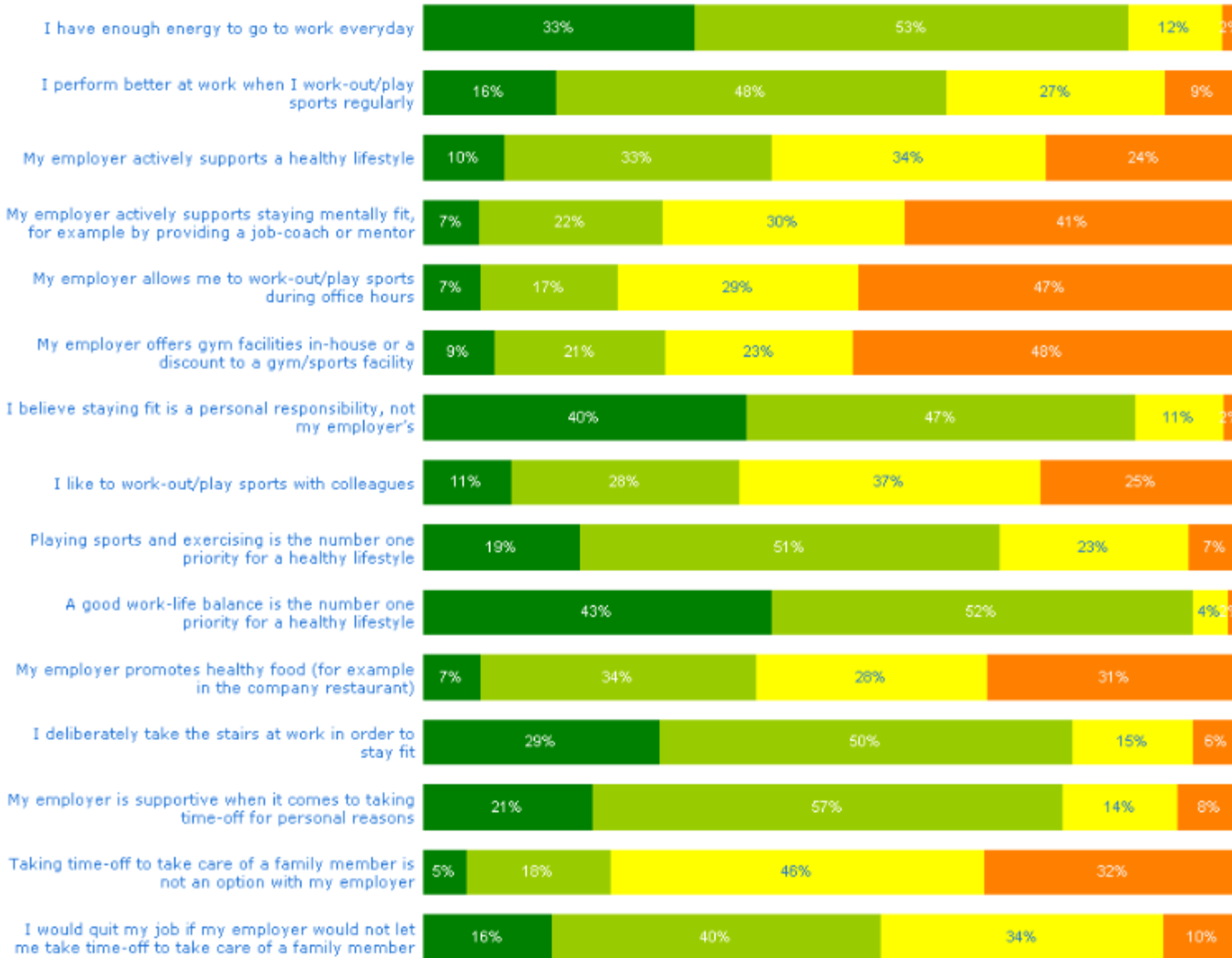


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France



Most of the French employees deliberately take the stairs at work



- Most French employees (79%) deliberately take the stairs at work in order to stay fit. The majority (87%) believe that staying fit is a personal responsibility.

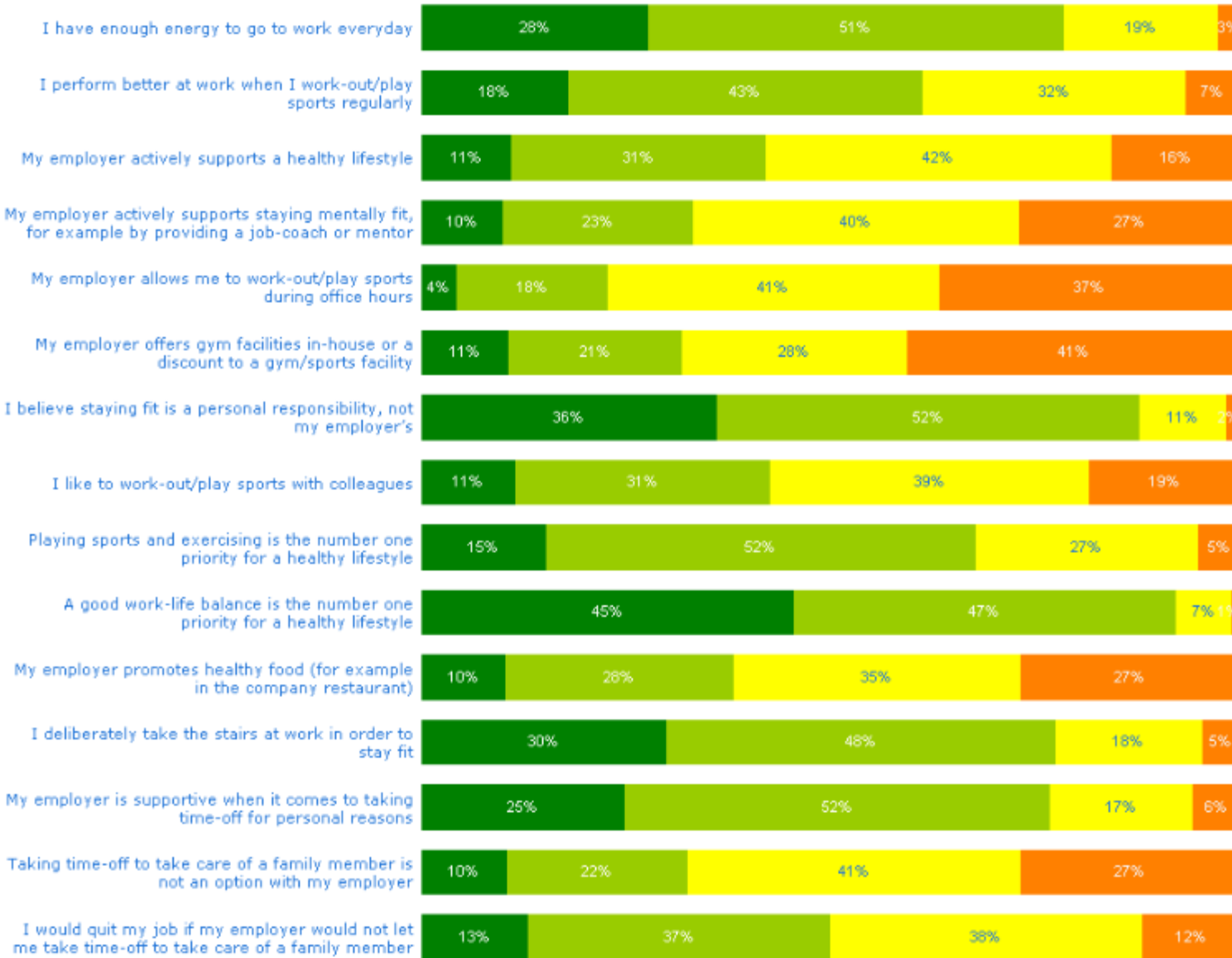
- For almost all French employees a good work-life balance is the number one priority for a healthy lifestyle.

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Germany



German employers are not that supportive when it comes to a healthy lifestyle of their employees



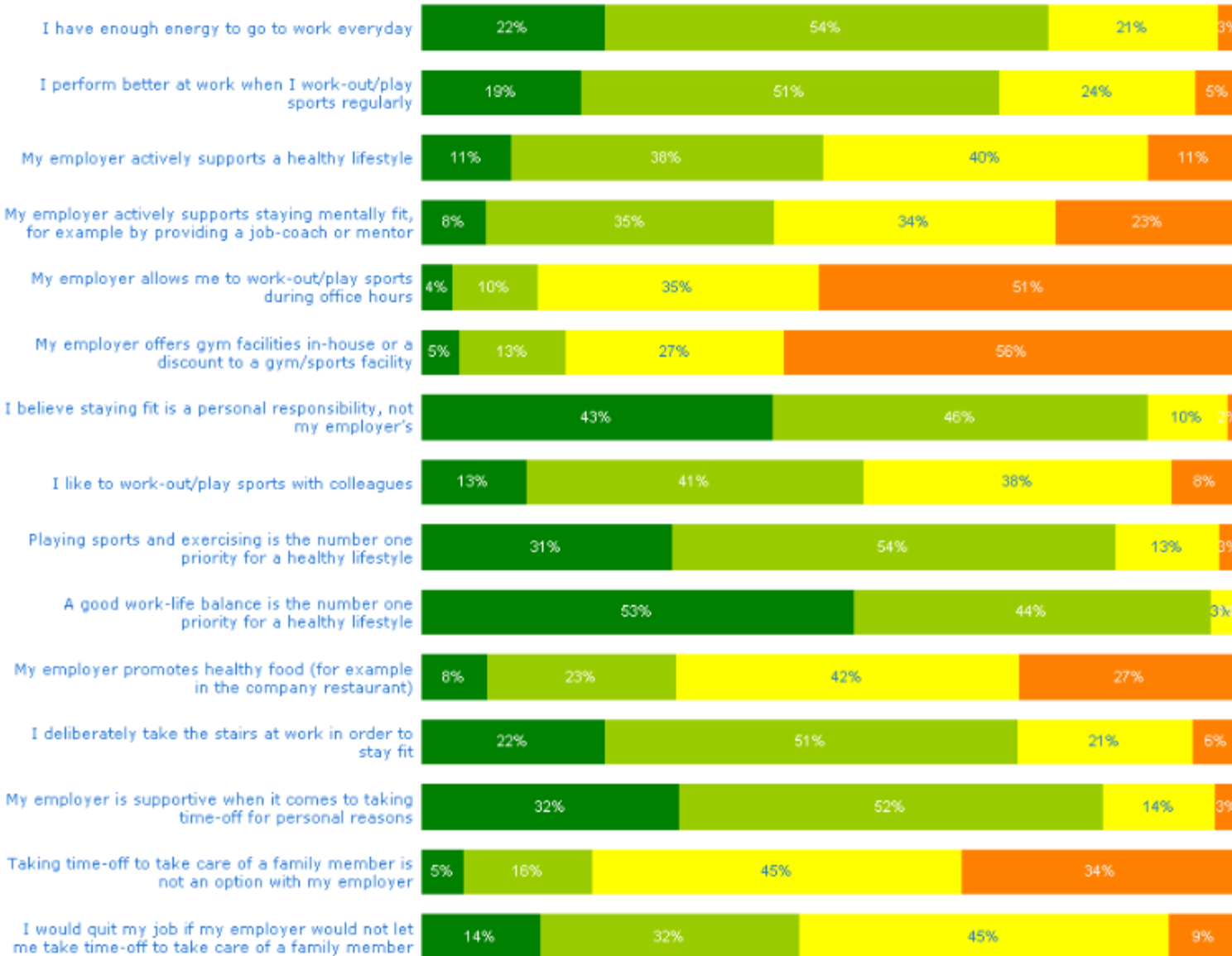
- Almost half of the German employers (42%) support their employees to live a healthy life.
- More than one third of the Germans (39%) do not believe that playing sports or work-outs on a regular basis ensures better performances at work.
- In line with this it is not that common to allow work-out or playing sports during office hours (22%). Staying fit is mainly a personal responsibility (88%).

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

Greece



Greeks believe that playing sports/work-out helps them to perform better at work



- Only one out of seven Greeks feels the support from their employer to work-out/play sports, while the majority of the Greeks believe that work-out/play sports makes them perform better at work (70%). Most Greeks feel that staying fit is their personal responsibility (89%). Working out during office hours and gym facilities at work are not that common in Greece.
- The Greek employers are supportive when it comes to taking time off for personal reasons (85%).
- The vast majority (79%) of the Greeks is allowed to take time off to take care of a family member.

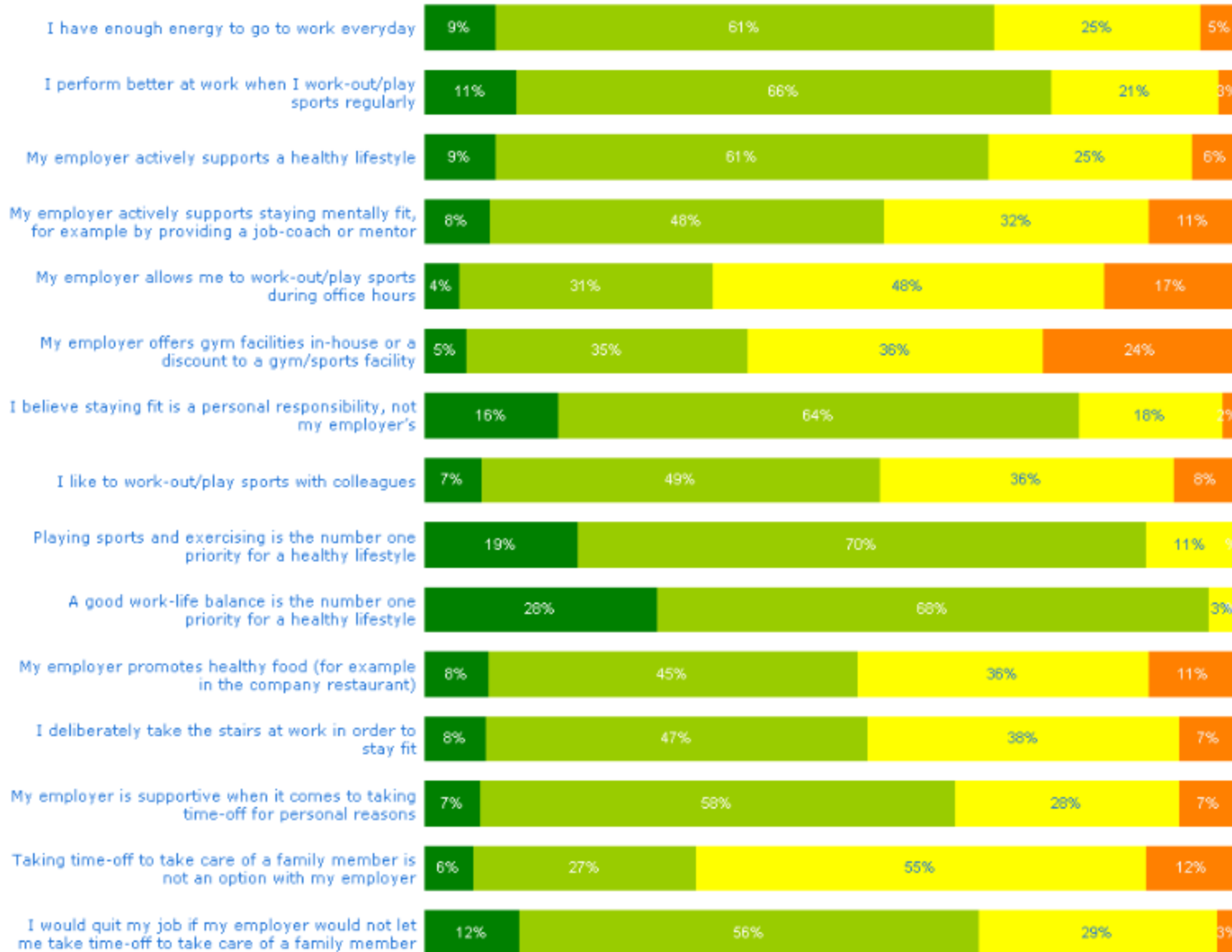
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Hong Kong



Hong Kong employees feel the support from their employer to live a healthy life

- Hong Kong employers actively support a healthy lifestyle (70%). About half of the Hong Kong employees (54%) say their employer actively supports staying mentally fit. However, working out/playing sports during office hours is less common (35%).
- The majority of the employers (65%) are supportive when it comes to taking time off for personal reasons.
- Seven out of ten Hong Kong employees (68%) would quit their job if their employer would not let them take time off to take care of a family member.

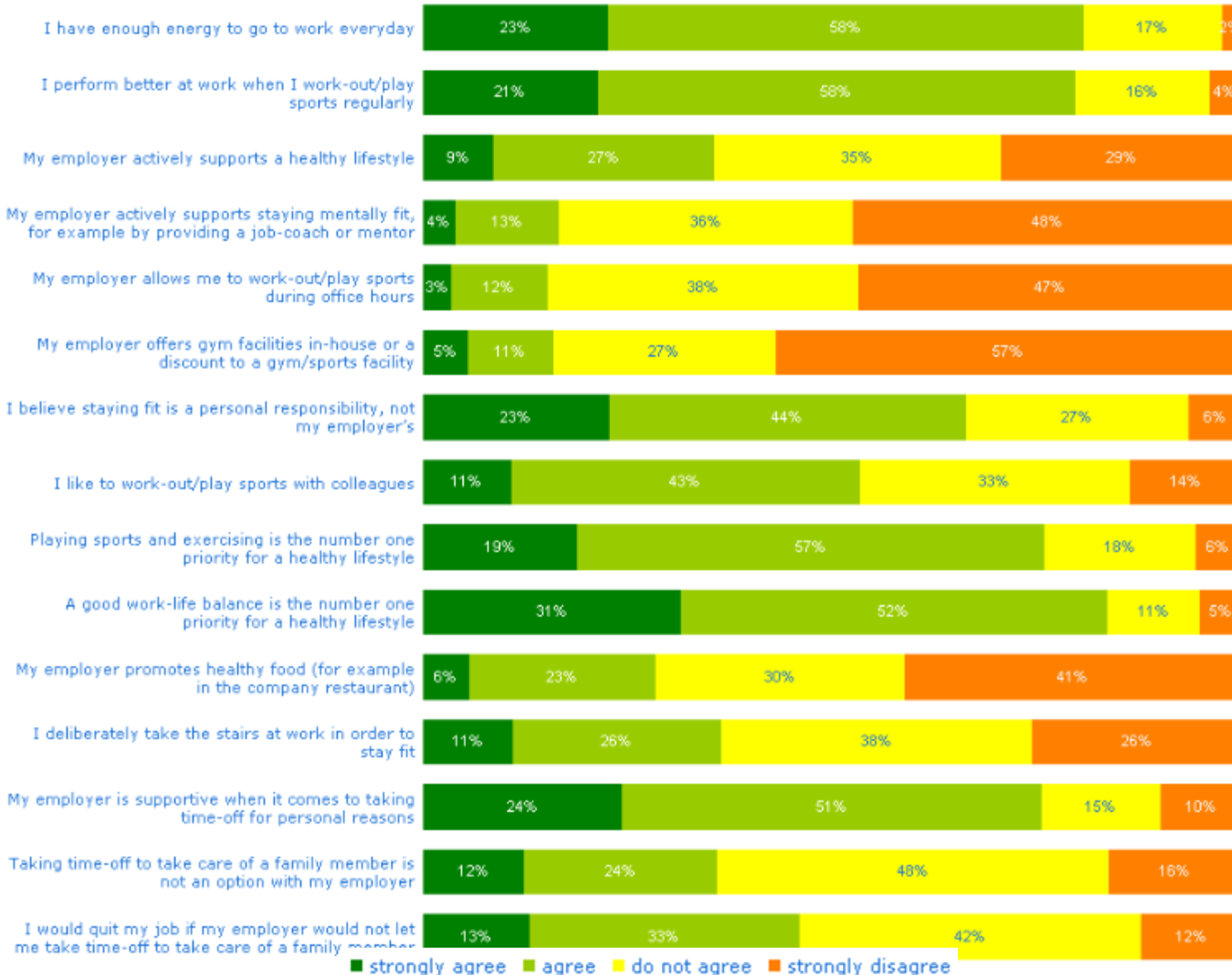


strongly agree agree do not agree strongly disagree

Hungary



Hungarians do not often take the stairs at work in order to stay fit



- In Hungary it does not seem common for an employer to support staying mentally fit (17%) or physically fit by allowing to work out during office hours (15%) or by offering gym facilities or discount (16%).

- Therefore not many Hungarian employers are considering to support their employees to stay mentally and physically fit, two third of the Hungarian employees believe staying fit is their own responsibility.

- Only one third of the Hungarians (37%) deliberately take the stairs at work in order to stay fit. This is the lowest share of all surveyed countries.

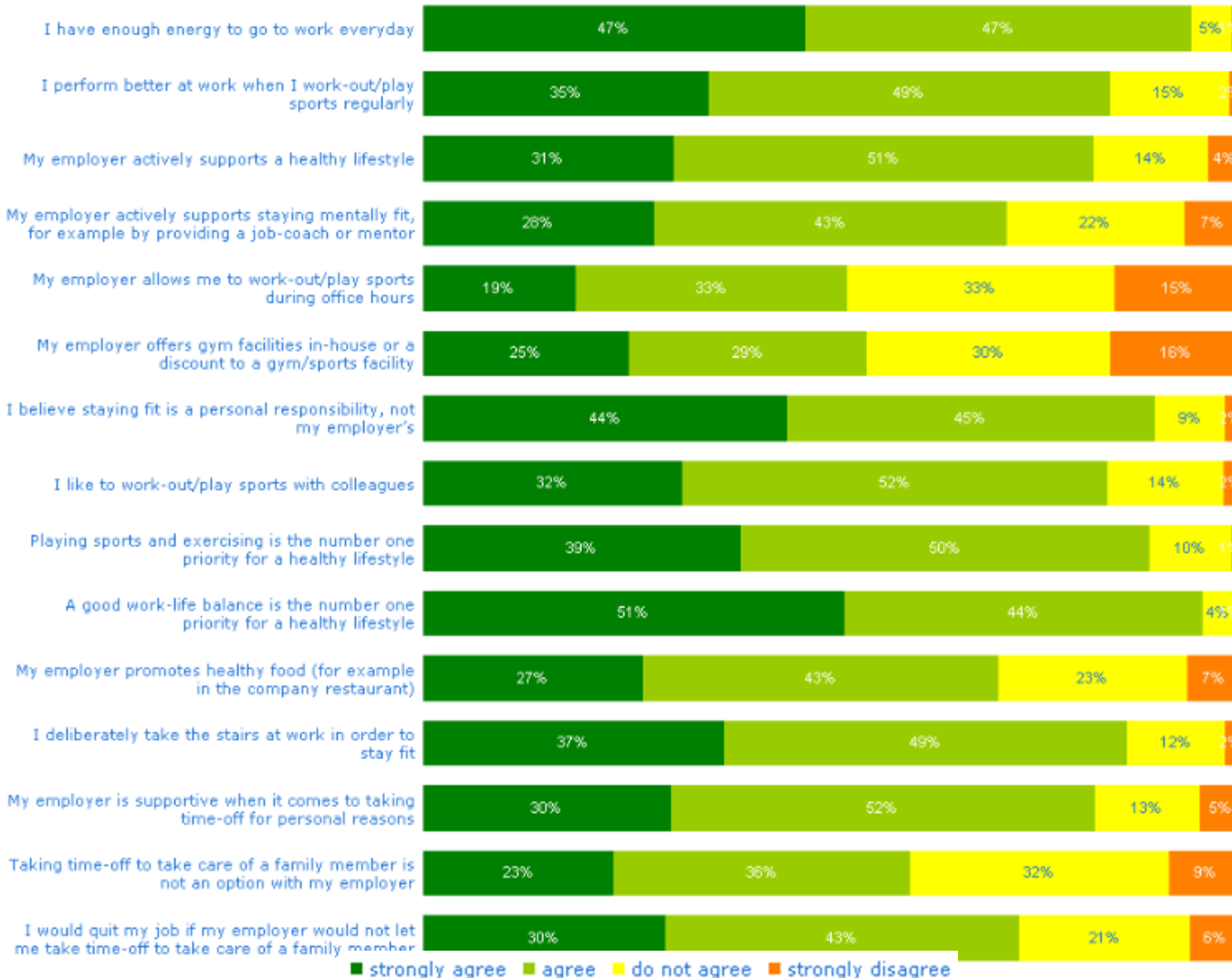
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India



Indian employees are positive about their employer

- People from India are positive about their employer; employers are supportive when it comes to a healthy lifestyle (82%) as well as personal reasons (82%).
- Most of the Indian employees (94%) have enough energy to go to work everyday. This is the highest share of all surveyed countries.

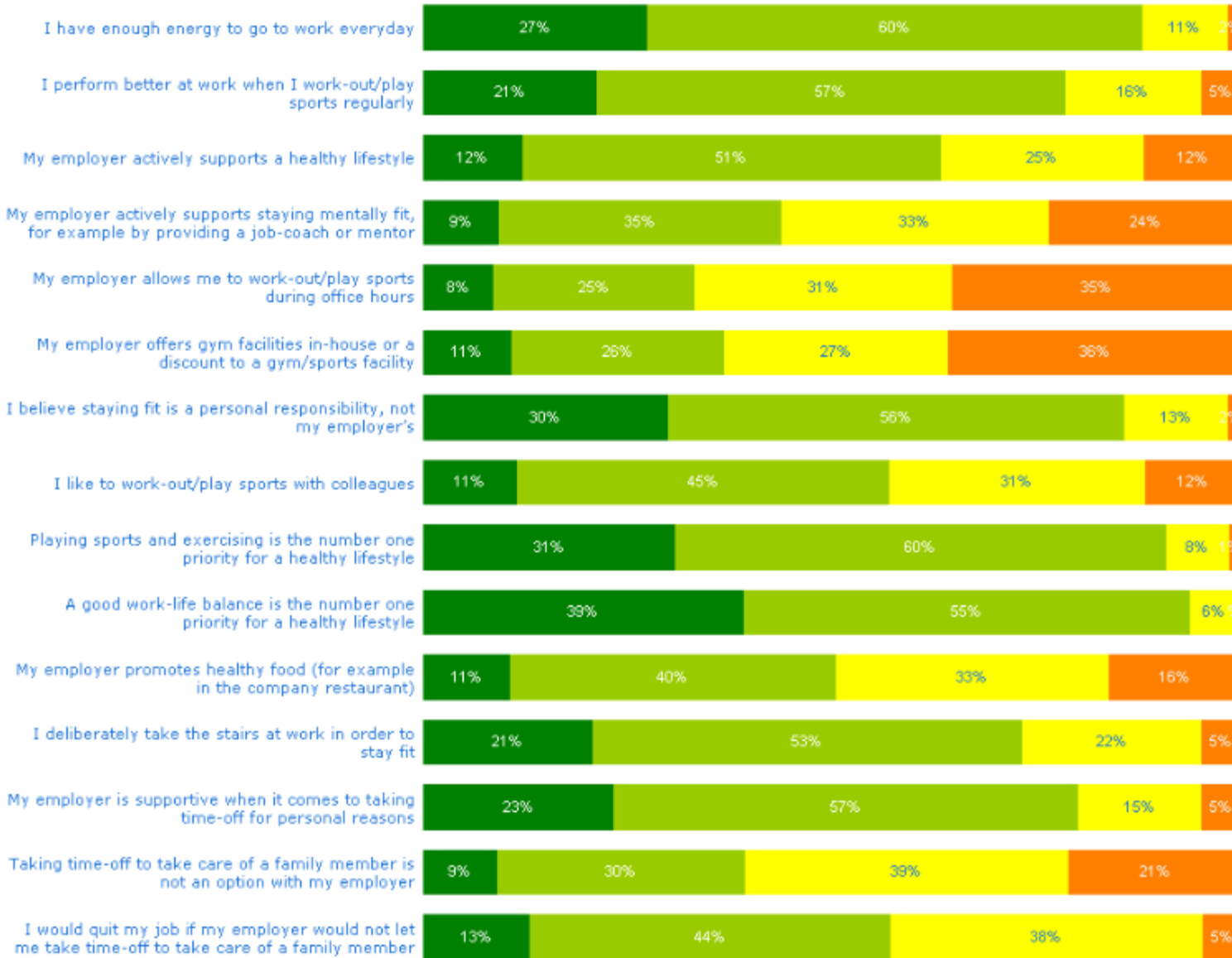


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Italy



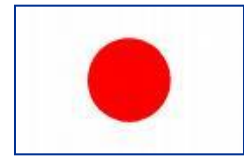
Italians believe that playing sports and exercising is very important for a healthy lifestyle



- The vast majority (91%) of the Italians believe that playing sports and exercising is the number one priority for a healthy lifestyle. One third of the Italian employers (33%) allows them to play sports during office hours.
- There is nothing wrong with the energy level of Italians; almost nine out of ten Italians (87%) have enough energy to go to work everyday.

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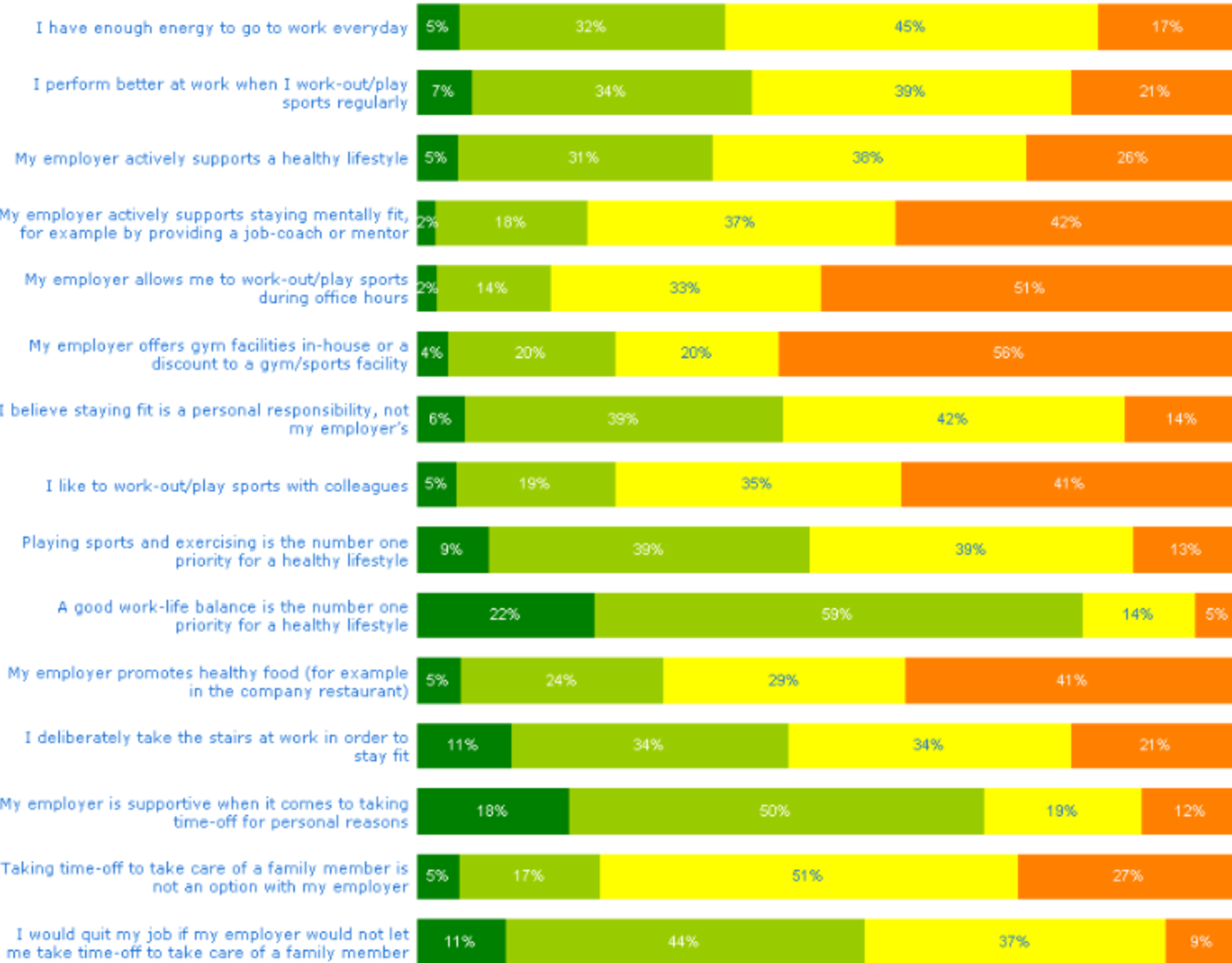
Japan



Most Japanese employees have a low energy level

• Only four out of ten Japanese employees (37%) have enough energy to go to work everyday; this is the lowest share of all surveyed countries. Four out of ten Japanese employees feel that they perform better at work by working out/playing sports.

• It is not common in Japan for an employer to actively support a healthy lifestyle. About a third (36%) of the Japanese employers does so. One out of five employers offers support to stay mentally fit and about a quarter supports staying physically fit by allowing their employees to work out during office hours.



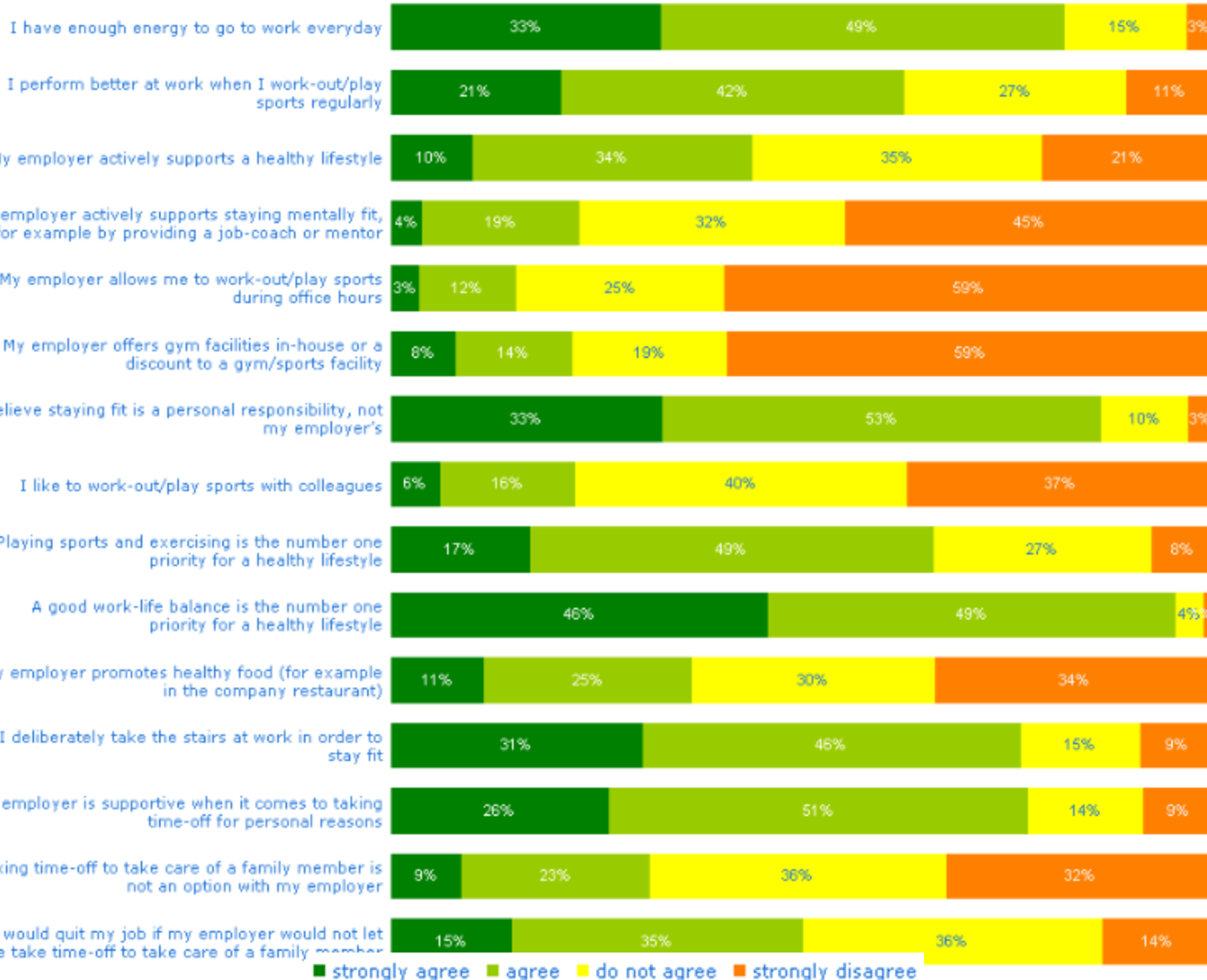
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Luxembourg



Luxembourgers do not like to play sports with colleagues

- About two thirds of the Luxembourgers (68%) say that playing sports and exercising is the number one priority for a healthy lifestyle. About half of the Luxembourg employees say that they perform better at work when they work-out/play sports regularly.
- People from Luxembourg do not like to work out/play sports with colleagues. Only one out of five Luxembourgers (22%) agree with this statement. This is the lowest share of all surveyed countries.
- One out of five Luxembourgers believe that their employer is supportive when it comes to work-out and play sports; 22% of the employers offers gym facilities or discount to a gym.



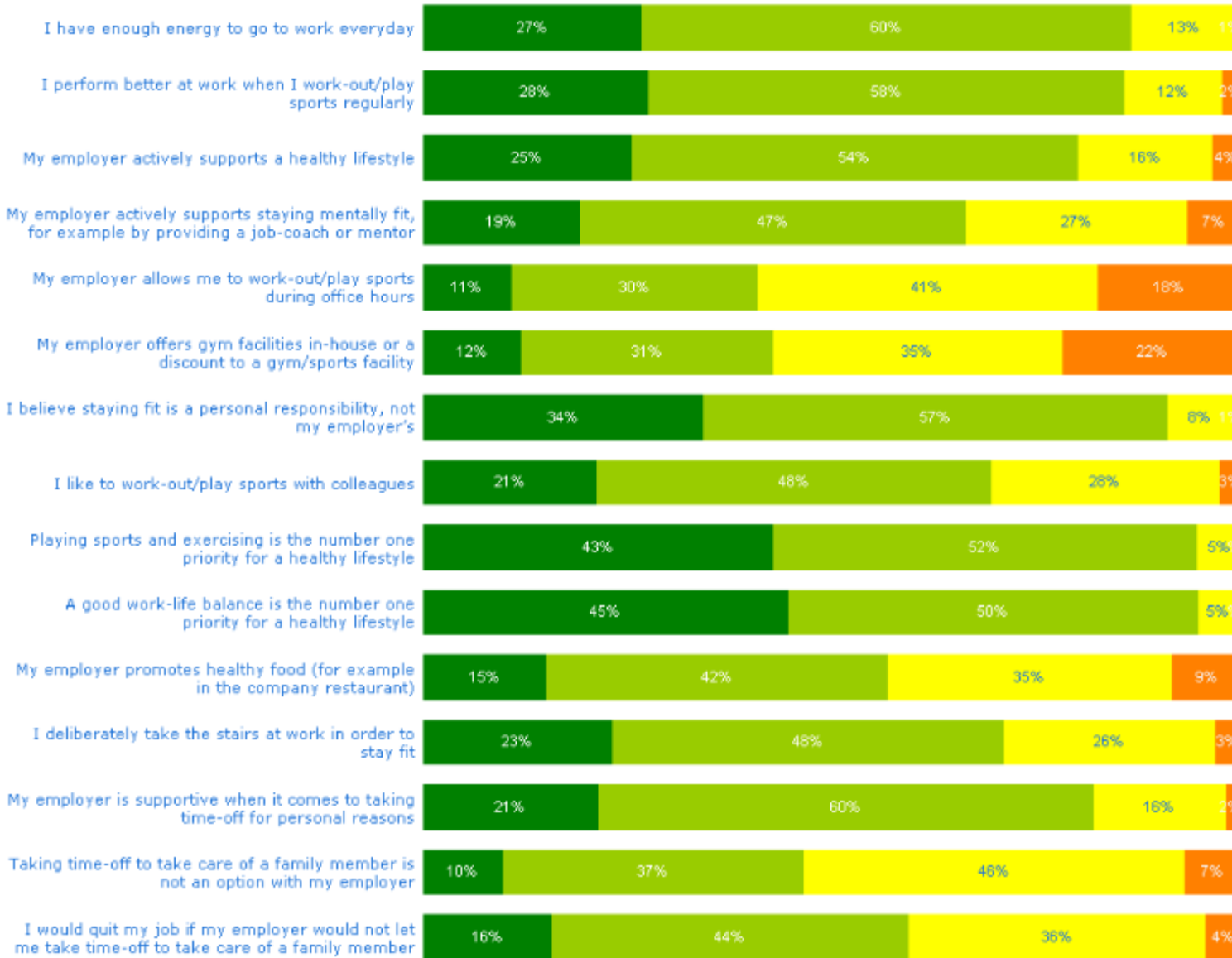
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Malaysia



Malaysians believe that playing sports and exercising are crucial for a healthy lifestyle

- The majority (80%) of the Malaysians believe that their employer actively supports a healthy lifestyle.
- Also most of the Malaysians (95%) believe that playing sports and exercising is the number one priority for a healthy lifestyle. This share is the highest of all surveyed countries.



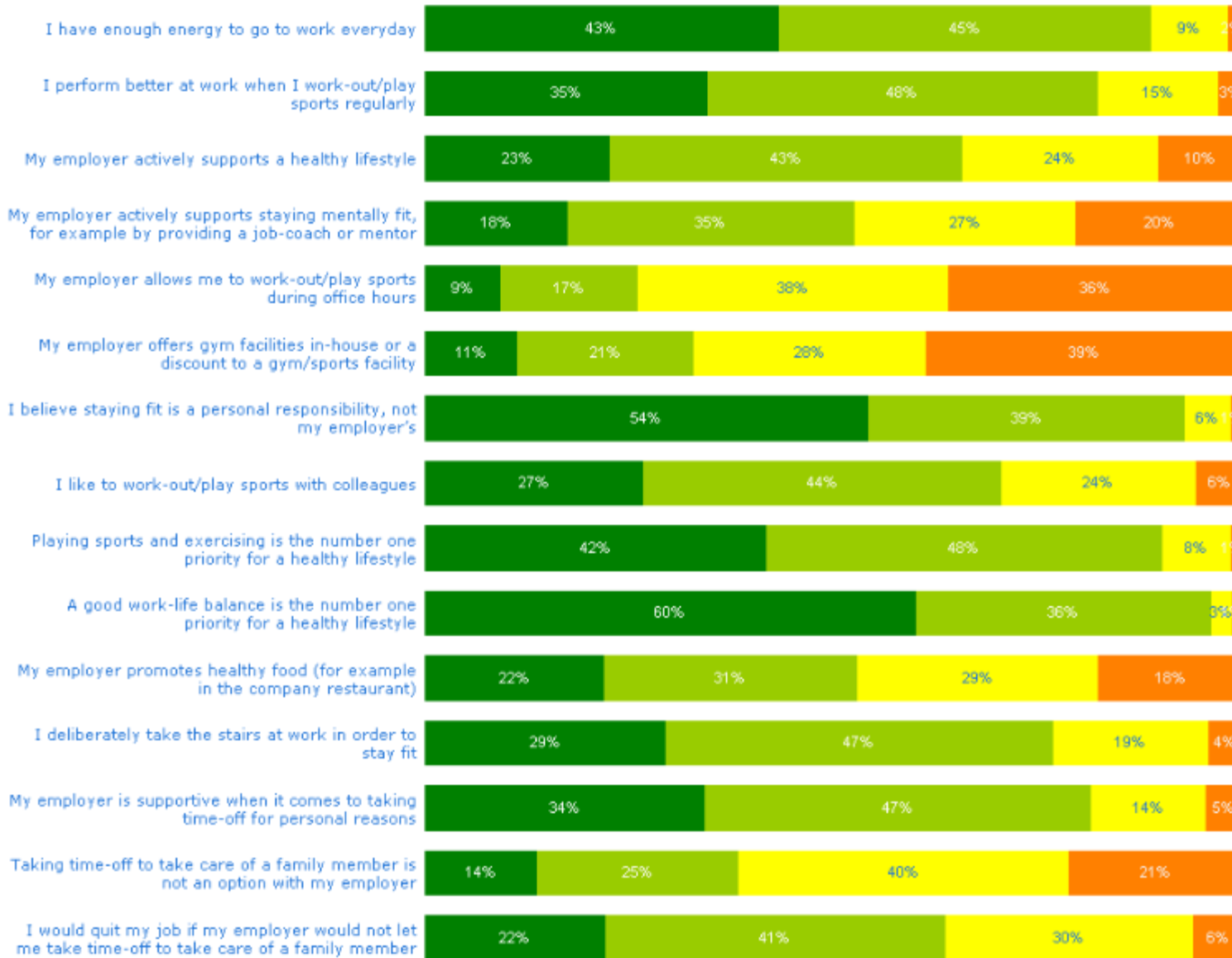
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Mexico



Mexicans believe that staying fit is your own responsibility

- Mexicans perform better at work when they work-out/play sports regularly (83%).
- The majority of the Mexican employees (93%) believe that it is their own responsibility to stay fit and not their employer's.



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

Netherlands



I have enough energy to go to work everyday



I perform better at work when I work-out/play sports regularly



Dutch employees do not like to work out/play sports with their colleagues

- Only one third of the Dutch employees (33%) would quit their job if their employer would not let them take time off to take care of a family member. This is the lowest share of all surveyed countries. For one out of three employees taking time off for personal reasons is not an option at their employer.

- Three out of ten Dutch employees (30%) like to work out/play sports with colleagues. This is one of the lowest shares of all surveyed countries.

- Half of the Dutch employees (55%) perform better at work when they are playing sports on a regular basis. One out of five employees say they are allowed to work-out/play sports during office hours.

My employer actively supports a healthy lifestyle



My employer actively supports staying mentally fit, for example by providing a job-coach or mentor



My employer allows me to work-out/play sports during office hours



My employer offers gym facilities in-house or a discount to a gym/sports facility



I believe staying fit is a personal responsibility, not my employer's



I like to work-out/play sports with colleagues



Playing sports and exercising is the number one priority for a healthy lifestyle



A good work-life balance is the number one priority for a healthy lifestyle



My employer promotes healthy food (for example in the company restaurant)



I deliberately take the stairs at work in order to stay fit



My employer is supportive when it comes to taking time-off for personal reasons



Taking time-off to take care of a family member is not an option with my employer



I would quit my job if my employer would not let me take time-off to take care of a family member



I like to watch sports



Watching sports makes me want to play sports



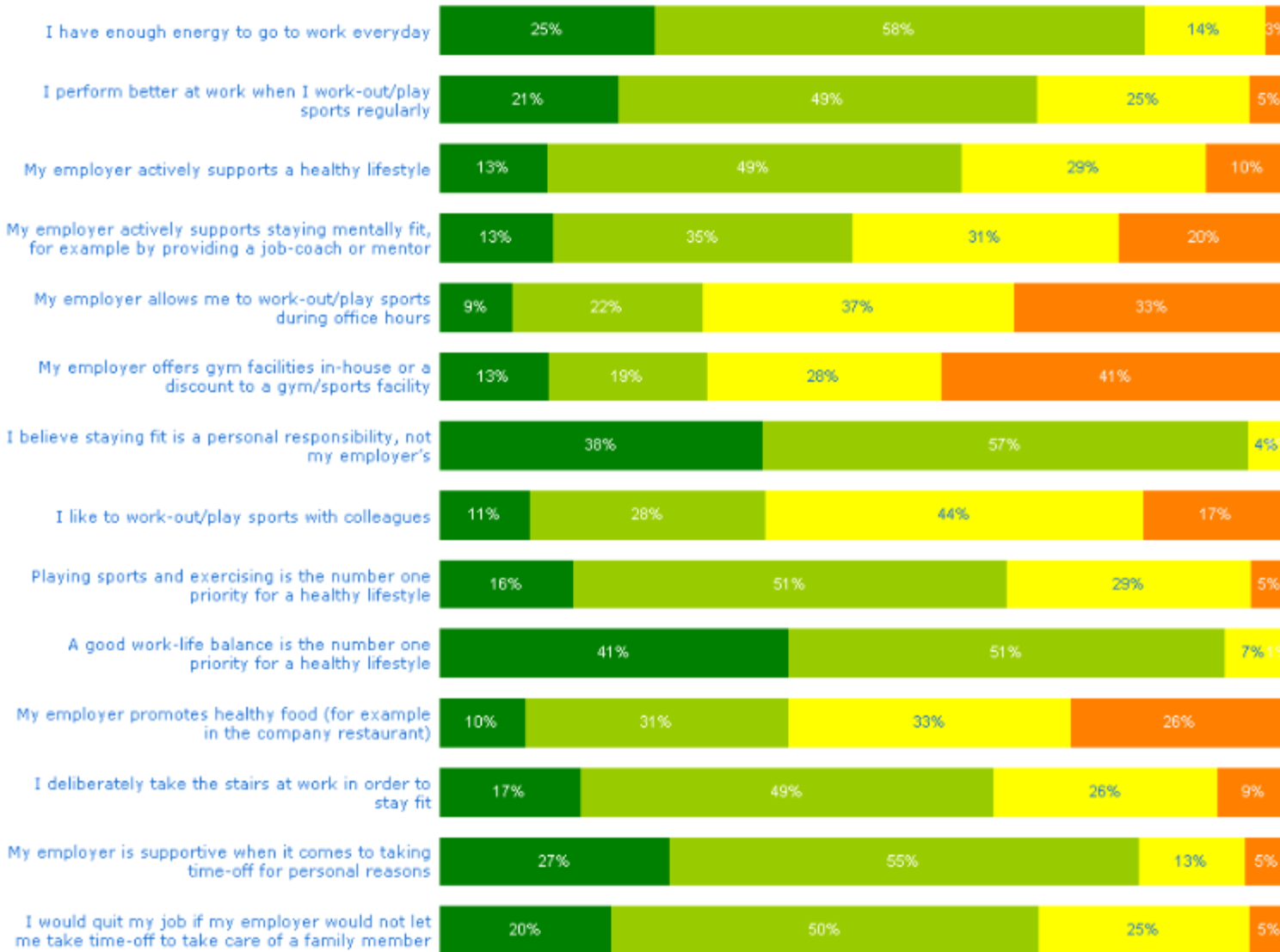
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Randstad Workmonitor, March 2014

New Zealand



New Zealanders are aware of the personal responsibility to stay fit



- New Zealanders believe that it is their own responsibility to stay fit. Nearly all New Zealanders (95%) agreed that it is a personal responsibility and not the employer's. New Zealanders perform better at work when they working out/playing sports regularly.

- Most of the New Zealanders (70%) would quit their job if their employer would not let them take time off to take care of a family member. Many New Zealanders say their employer is supportive when it comes to taking time-off for personal reasons.

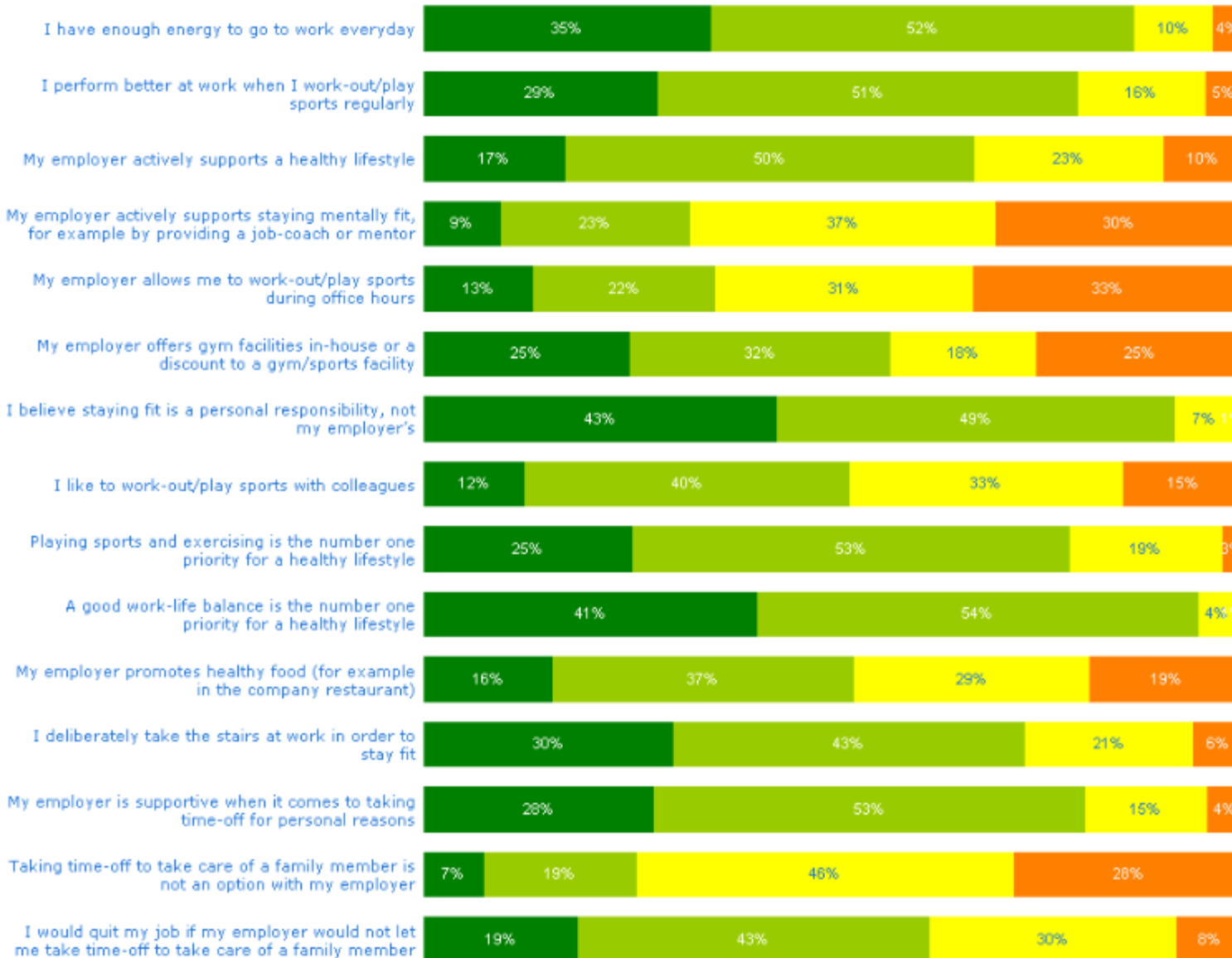
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Norway



Norwegian employers support their employees to stay healthy

- Norwegians (67%) believe that their employer supports a healthy lifestyle.
- To stay healthy Norwegian employers (57%) do offer more than average (35%) gym facilities in house or a discount to a gym/sports facility.

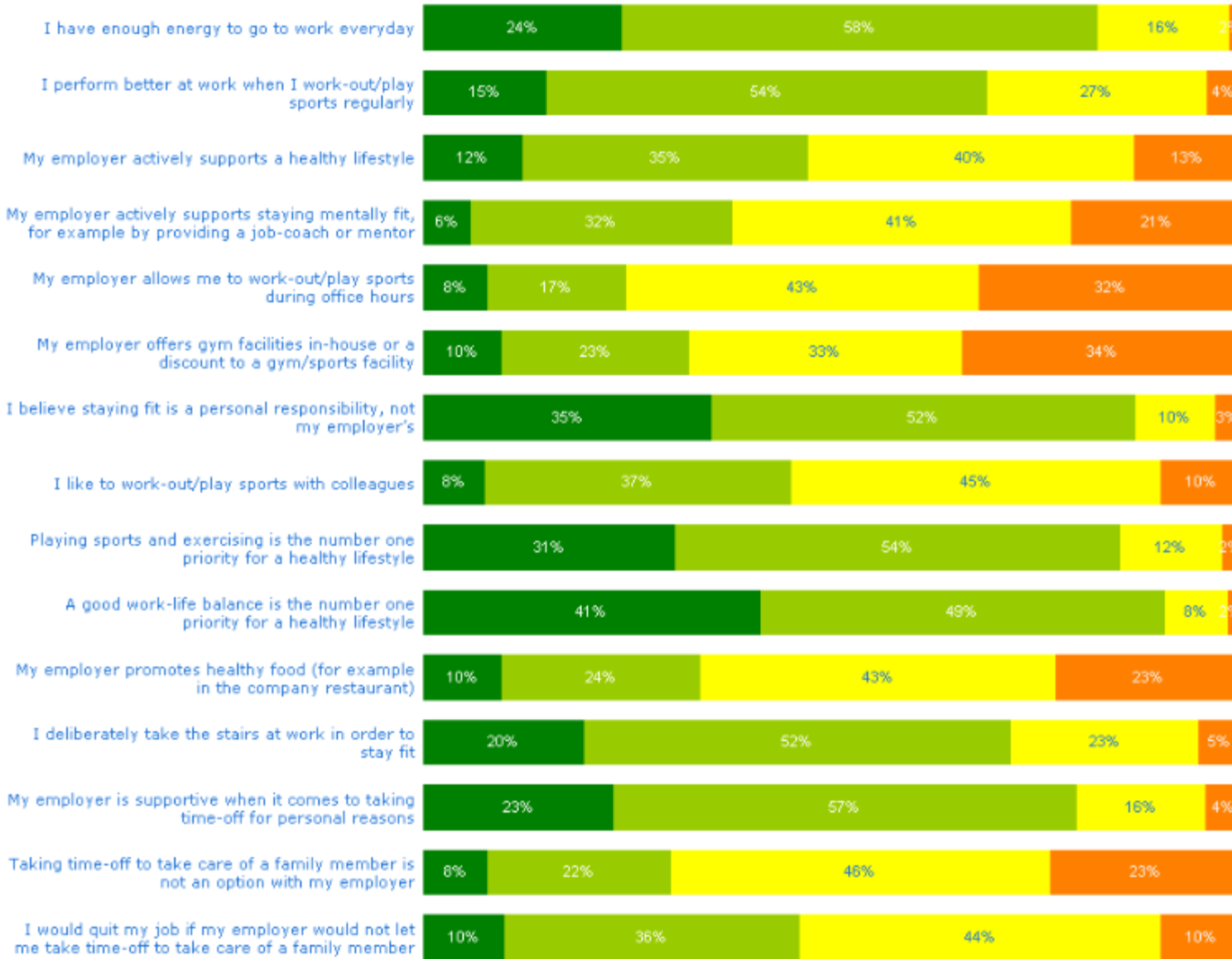


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Poland



Polish employers are not that supportive when it comes to healthy food



- Polish employees do not feel the support from their employer when it comes to healthy food. Only one third of the Poles (34%) believe that their employer promotes healthy food in for example the company restaurant.
- Half of the Poles (46%) would quit their job if their employer would not let them take time off to take care of a family member.
- About a quarter of the Poles feel that taking time off for personal reasons is not an option with their employer.

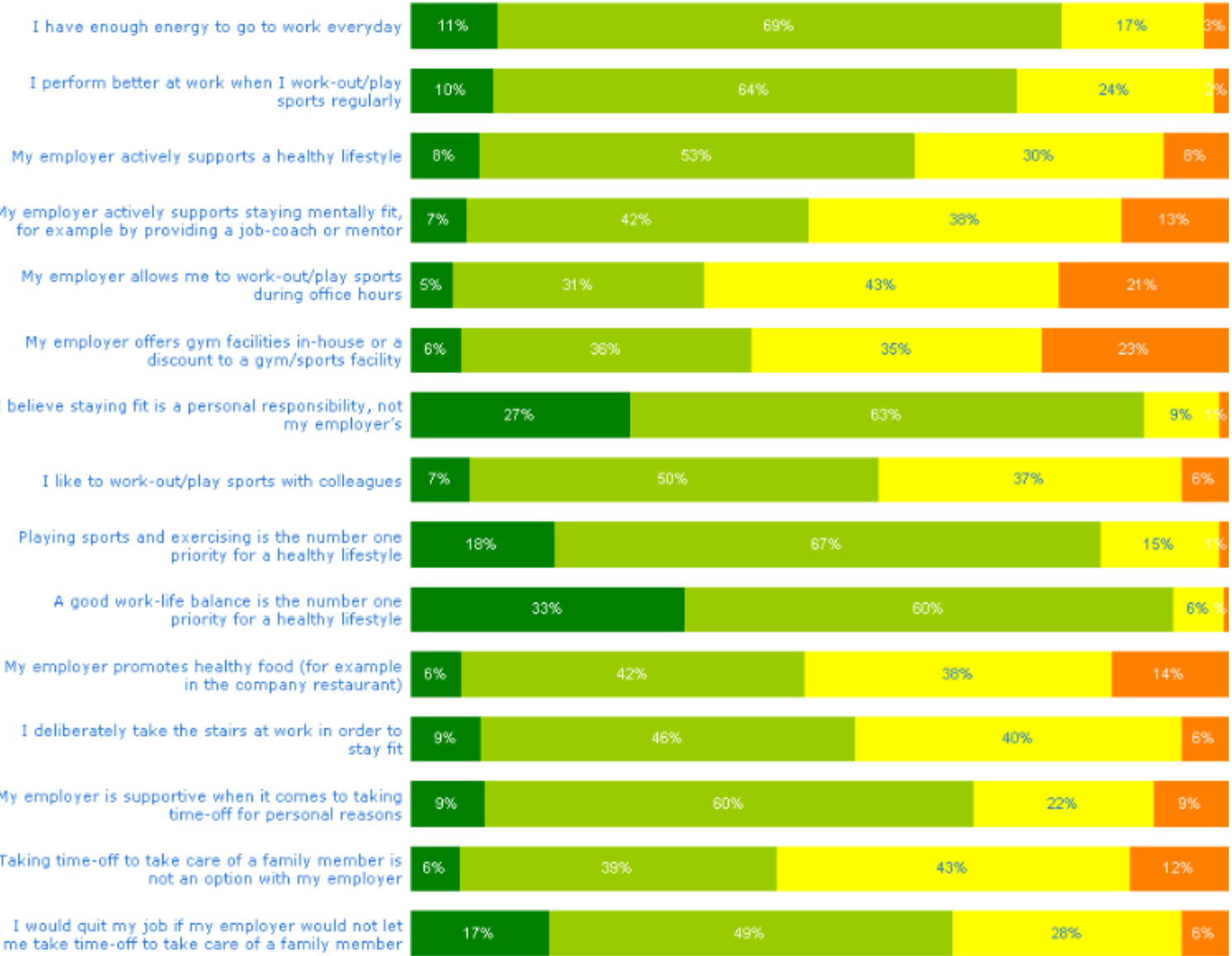
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Singapore



Singaporeans believe that staying fit is your own responsibility

- The vast majority (90%) of the Singaporeans believe that staying fit is their own responsibility and not their employer's.
- Most of the Singaporeans (85%) believe that playing sports and exercising is the number one priority for a healthy lifestyle.



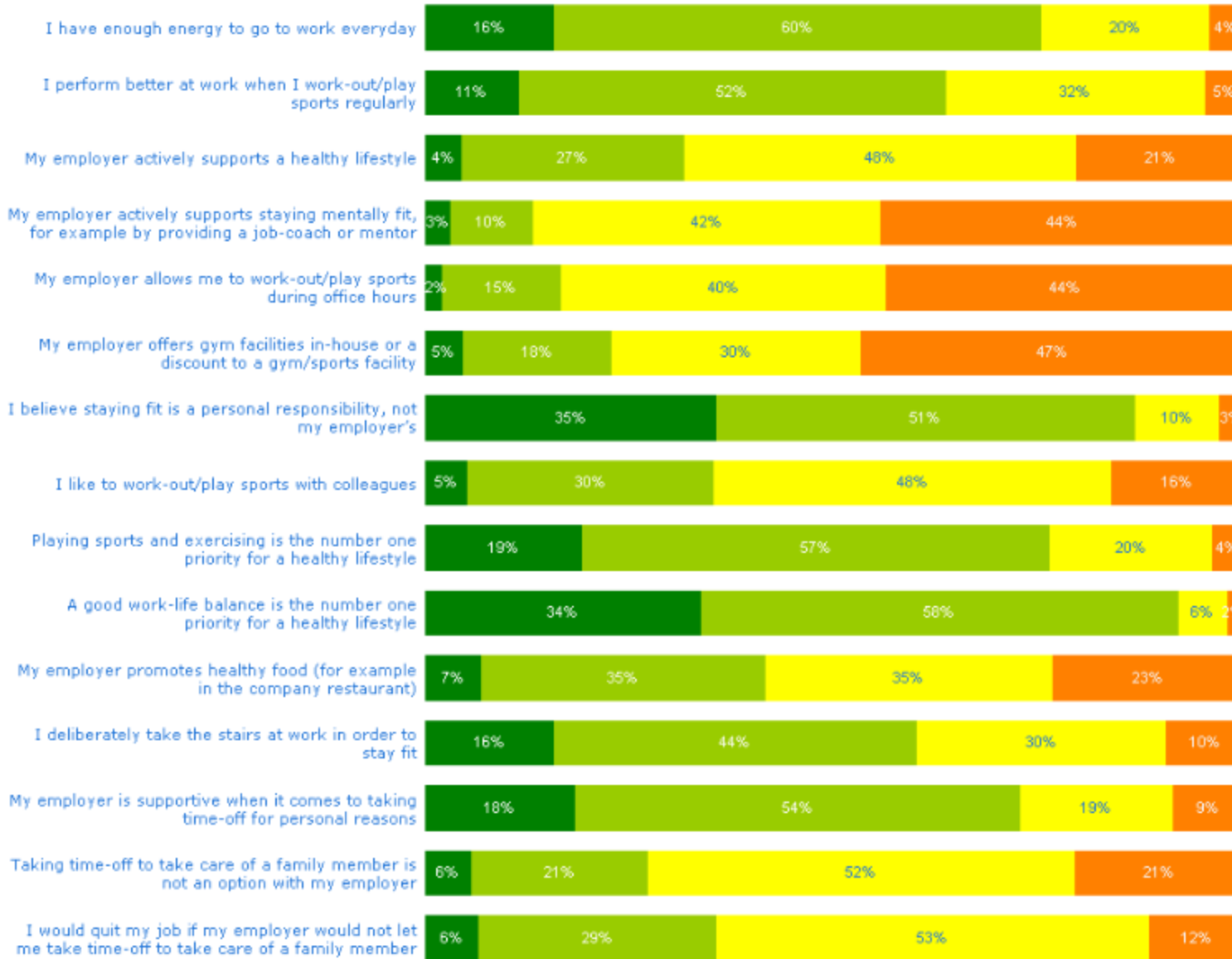
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Slovakia



Slovaks believe that a good work-life balance is crucial for a healthy lifestyle

- The vast majority (92%) of the Slovaks say that a good work-life balance is the number one priority for a healthy lifestyle.
- Slovakian employers are supportive when it comes to taking time off for personal reasons; more than seven out of ten Slovaks (72%) agreed with this statement. Only a quarter (27%) says that taking time off for personal reasons is not an option at their employer.



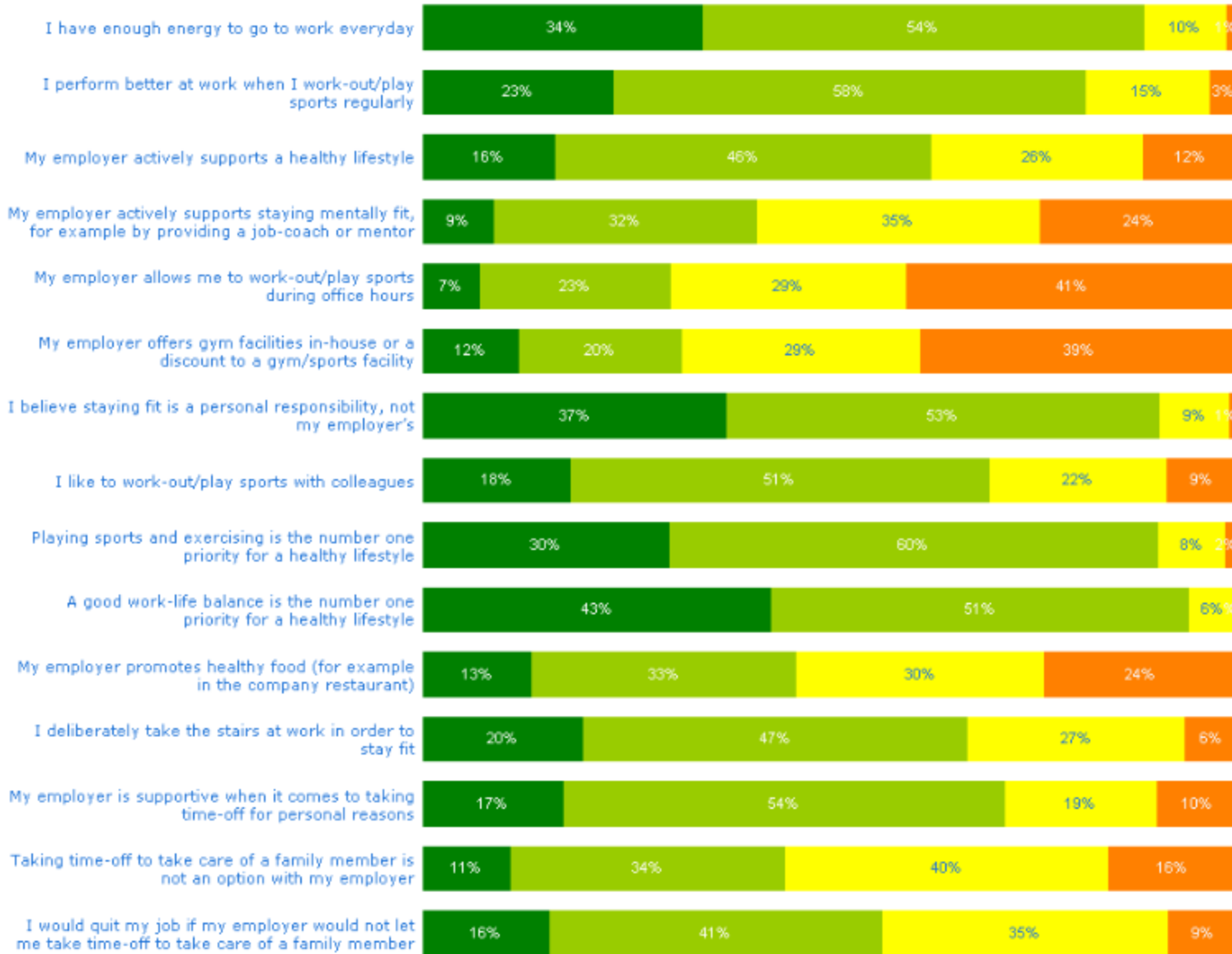
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Spain



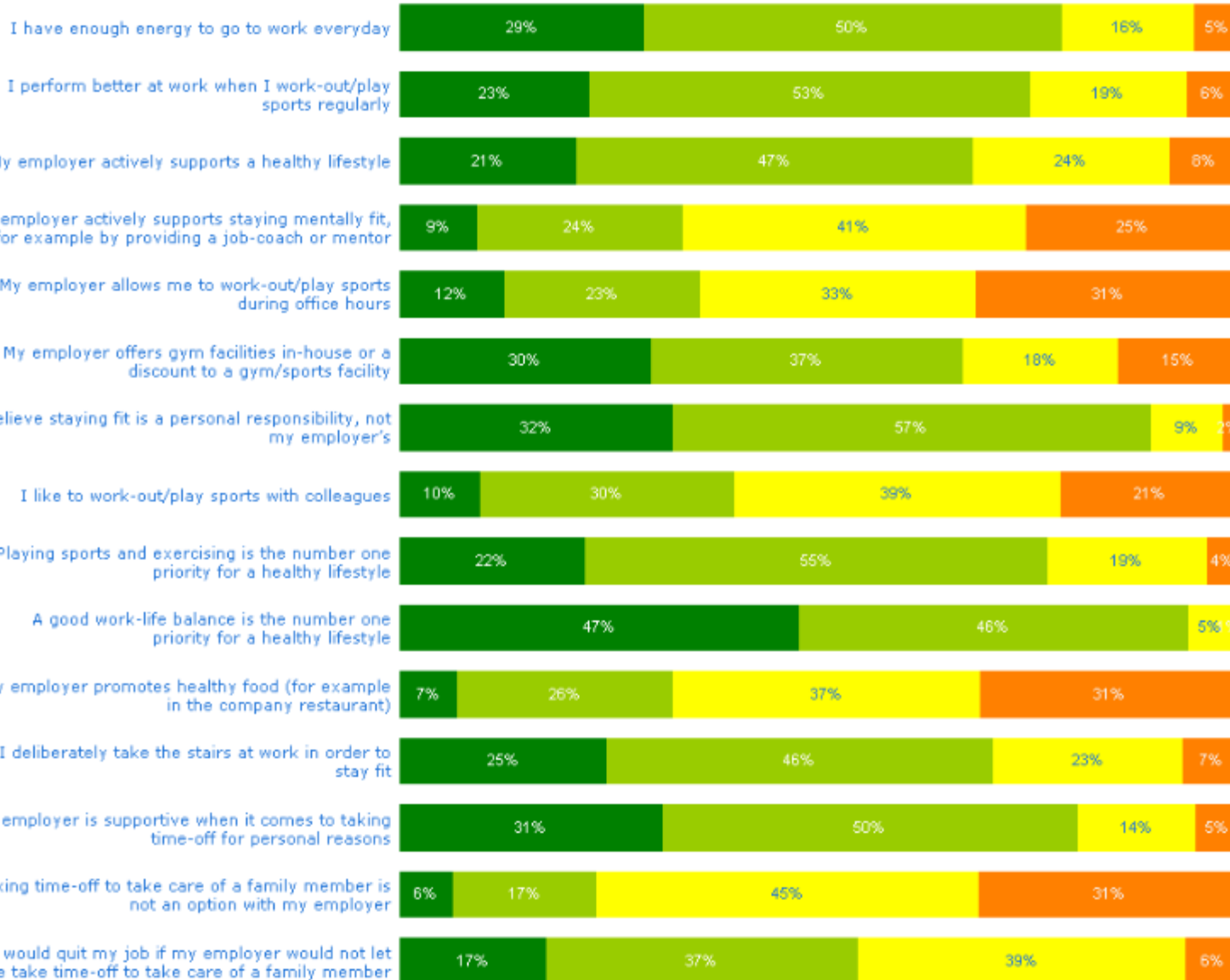
Spaniards perform better when they work out/play sports regularly

- Four out of five Spaniards (81%) perform better at work when they work out/play sports regularly.
- Spaniards believe that their employer supports them to live a healthy life; one third (32%) feels the support to stay physically fit by offering discount to a gym.



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Sweden

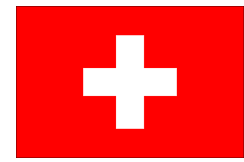


Swedish have supportive employers when it comes to a healthy lifestyle

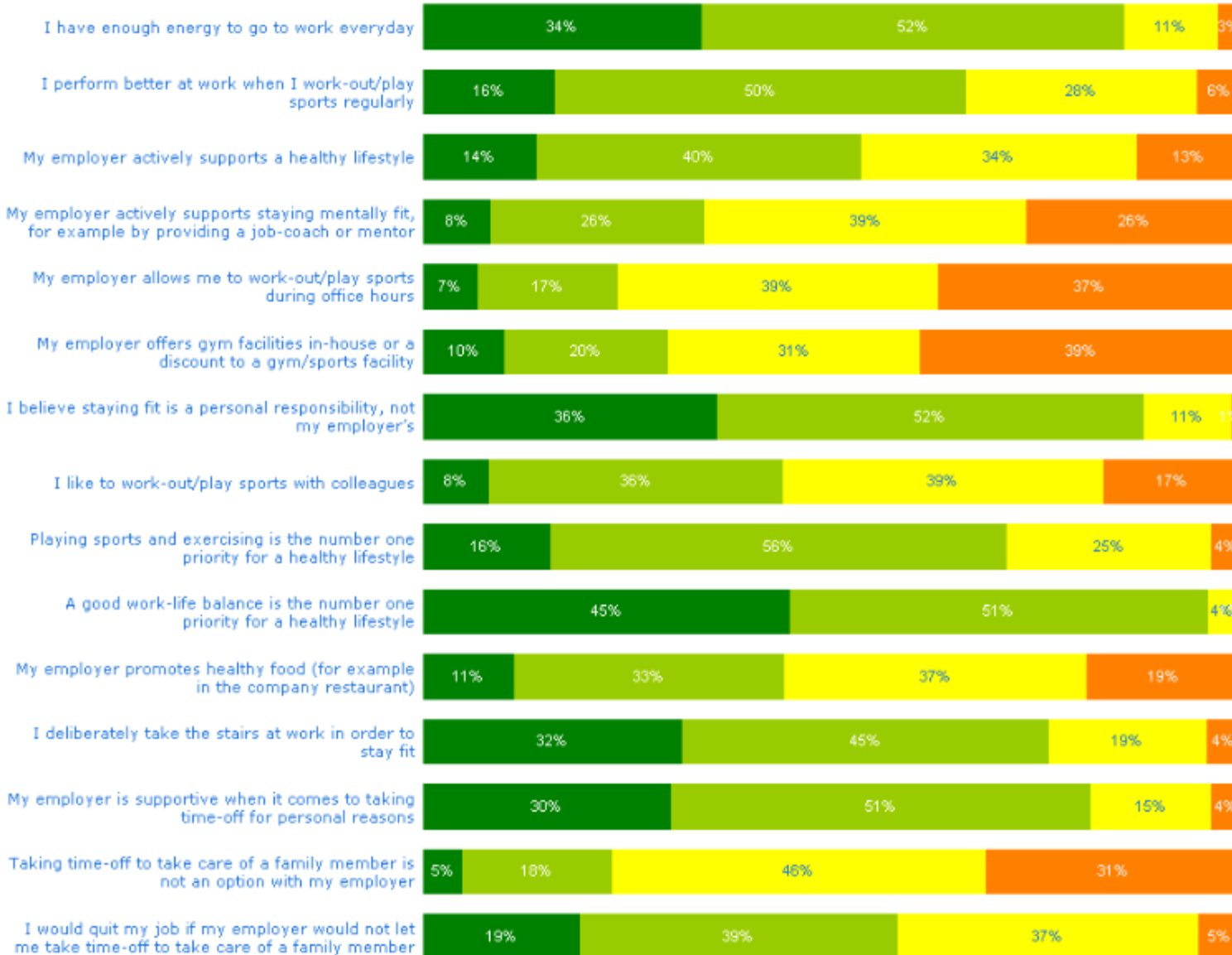
- Nearly seven out of ten Swedish employees (68%) believe that their employer actively supports a healthy lifestyle. Swedish employers are supportive when it comes to stay fit both physically and mentally. Two thirds of the employers offers their employees gym facilities or discount to a gym. Eight out of ten employers are supportive when it comes to personal reasons.
- One third of the Swedish employers (33%) promotes healthy food.

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

Switzerland



According to the Swiss, a good work-life balance is crucial for a healthy lifestyle



- Almost all the Swiss (96%) believe that a good work-life balance is the number one priority for a healthy lifestyle.
- A quarter (23%) think that taking time off to take care of a family member is not an option at their employer.
- Swiss employees feel the support from their employer when it comes to personal reasons; four out of five employees (81%) agreed with this statement.

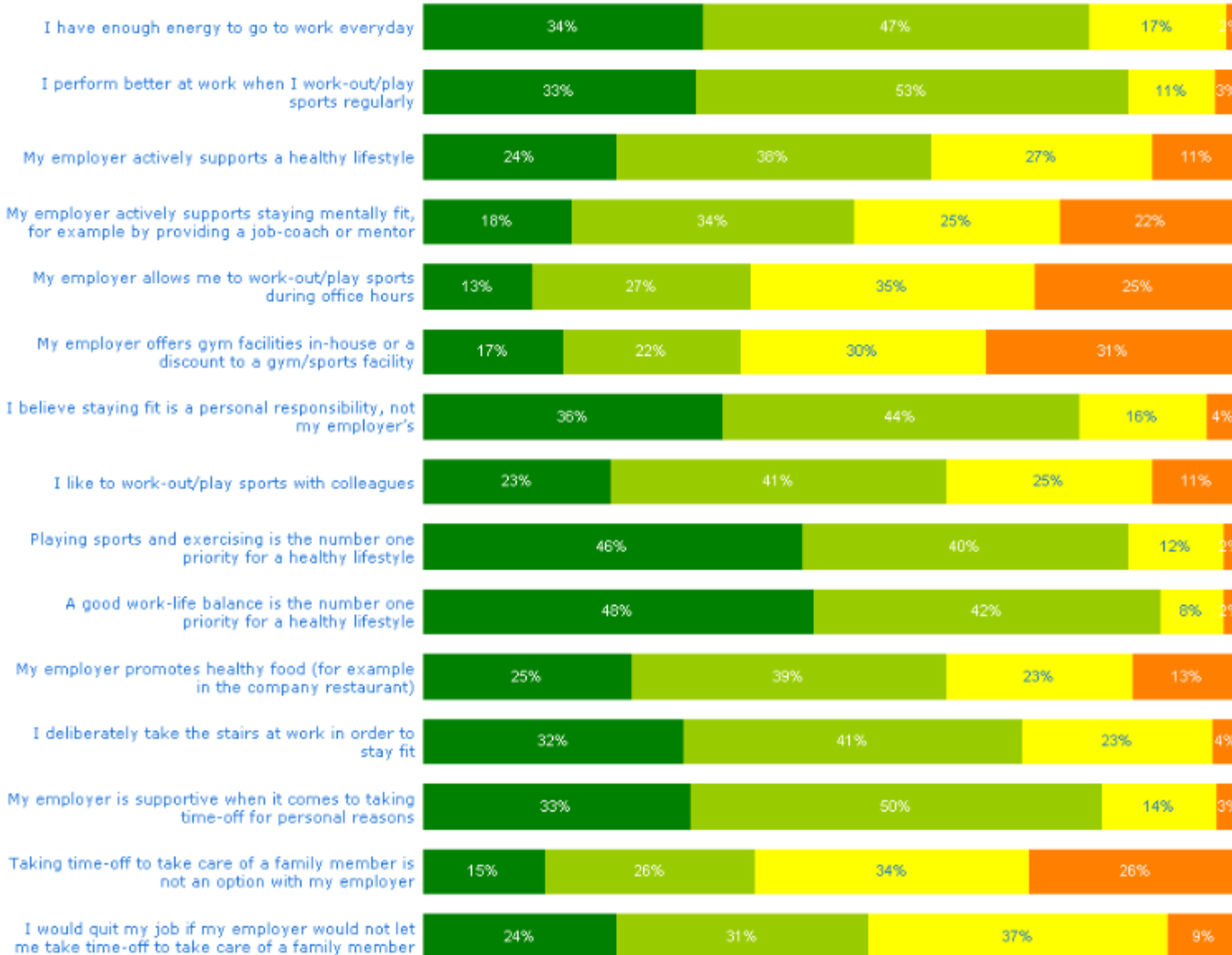
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Turkey



Working out/playing sports help the Turks to perform better at work

- Turks perform better at work when they work out/play sports regularly. Almost nine out of ten Turkish employees (86%) agree with this statement. This is one of the highest share of all surveyed countries.
- Turkish employers promote healthy food often (64%).

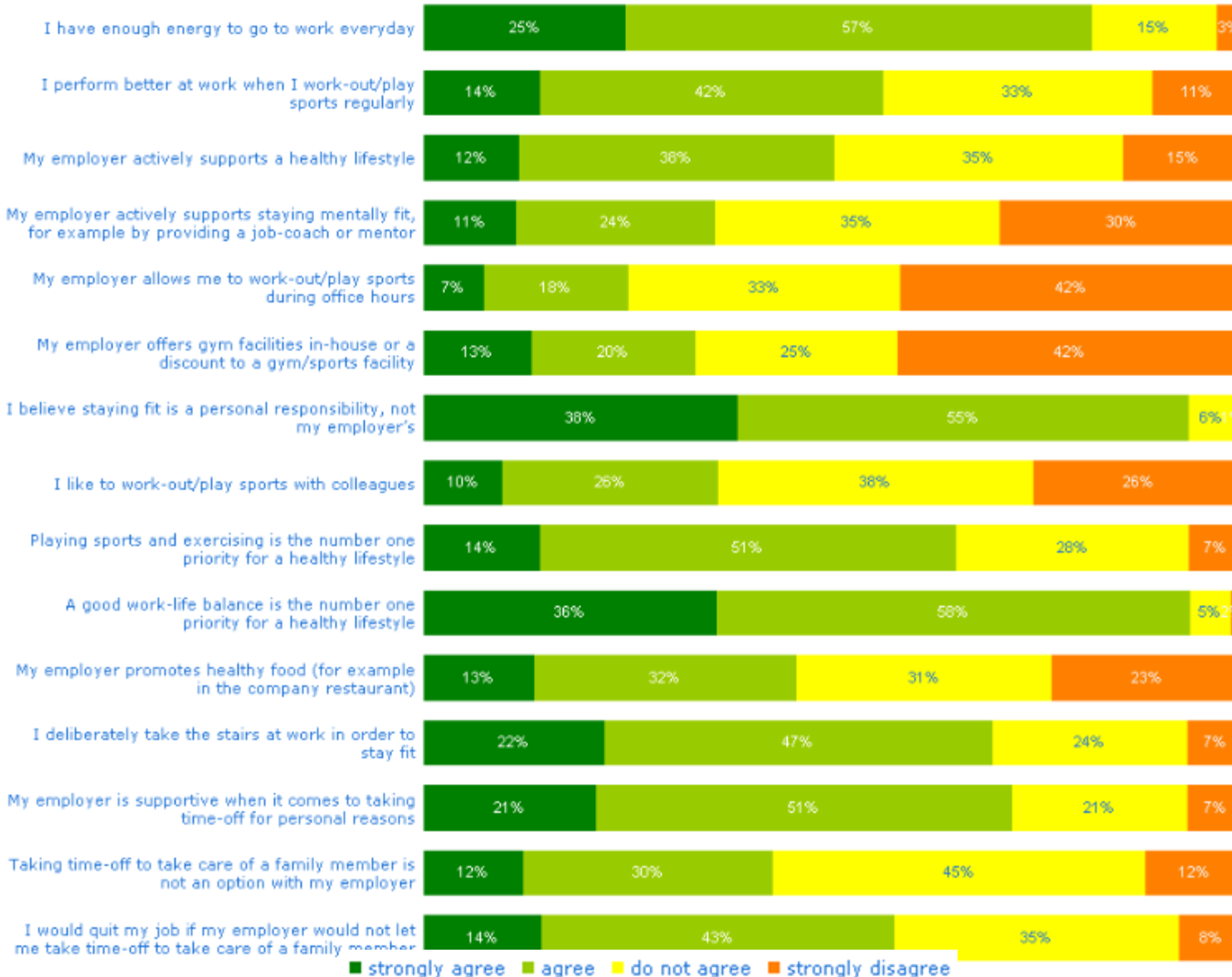


■ strongly agree ■ agree ■ do not agree ■ strongly disagree



British are aware of the personal responsibility to stay fit

- Most of the British employees (93%) believe that staying fit is a personal responsibility and not your employer's.
- Almost half of the British (44%) do not perform better when they work out/play sports regularly.
- Only one third of the British employees (36%) like to work out or play sports with colleagues. This share is one of the lowest of all surveyed countries.

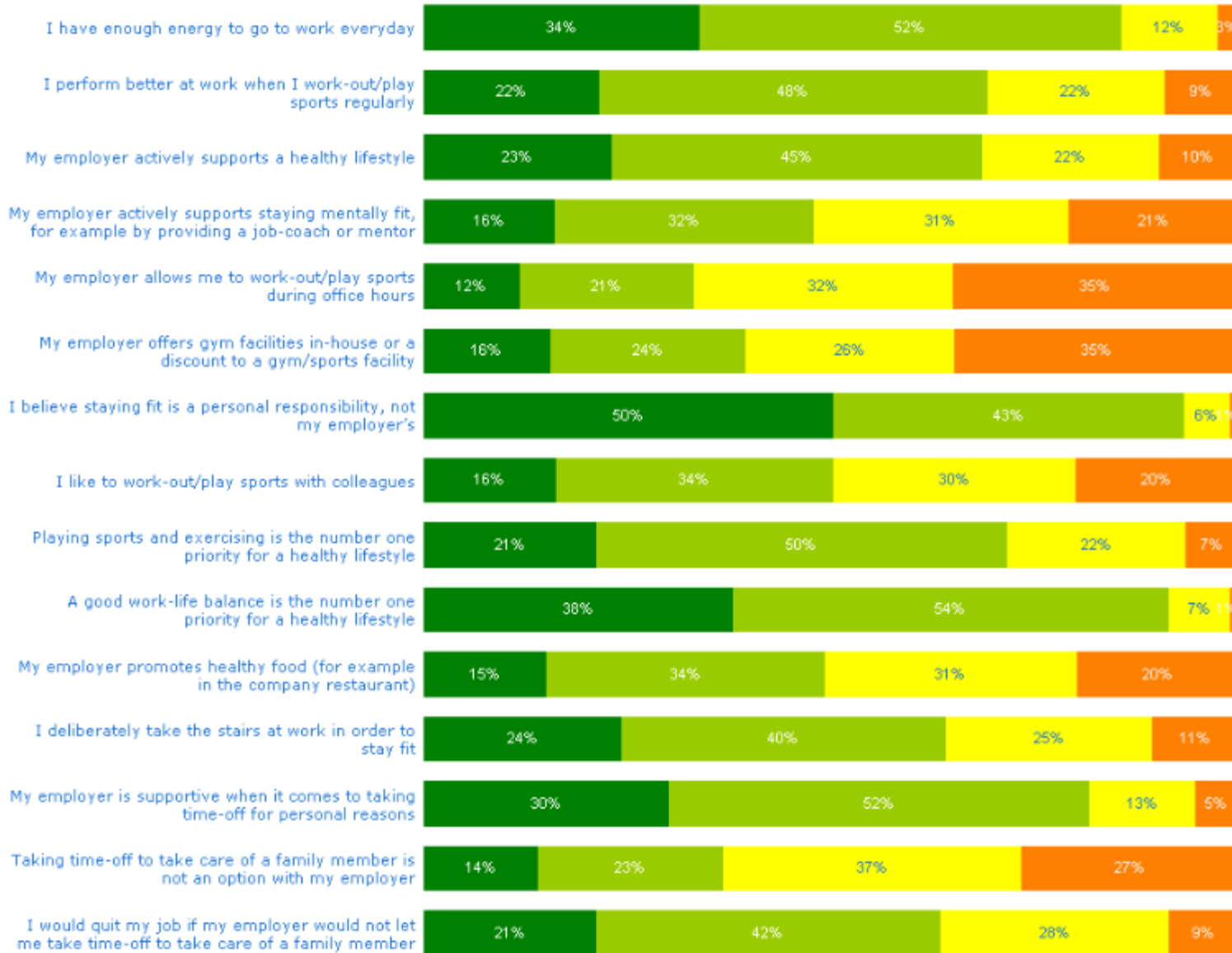


■ strongly agree ■ agree ■ do not agree ■ strongly disagree



Americans feel the support from their employer to live a healthy live.

- American employers actively support their employees to live healthy. More than two thirds of the Americans (68%) agree with this statement.
- Despite the support, American employees believe that staying fit is your own responsibility and not your employer's (93% agree with this statement).



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

Background to Randstad Workmonitor (1)

- The Randstad Workmonitor was launched in the Netherlands in 2003, then in Germany, and now covers 33 countries around the world. 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.

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 1st wave was conducted January 13-30, 2014 in the following countries:

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

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