work monitor.

results of the 51st edition of the survey

Randstad Research Institute 24 April 2023





agenda.

metho	odolo	ogy (of the	survey
		- 37		

results of the 51st edition of the survey

labor market turnover

how long does it take to find a job?

job satisfaction

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unemployment risk evaluation

new job opportunities

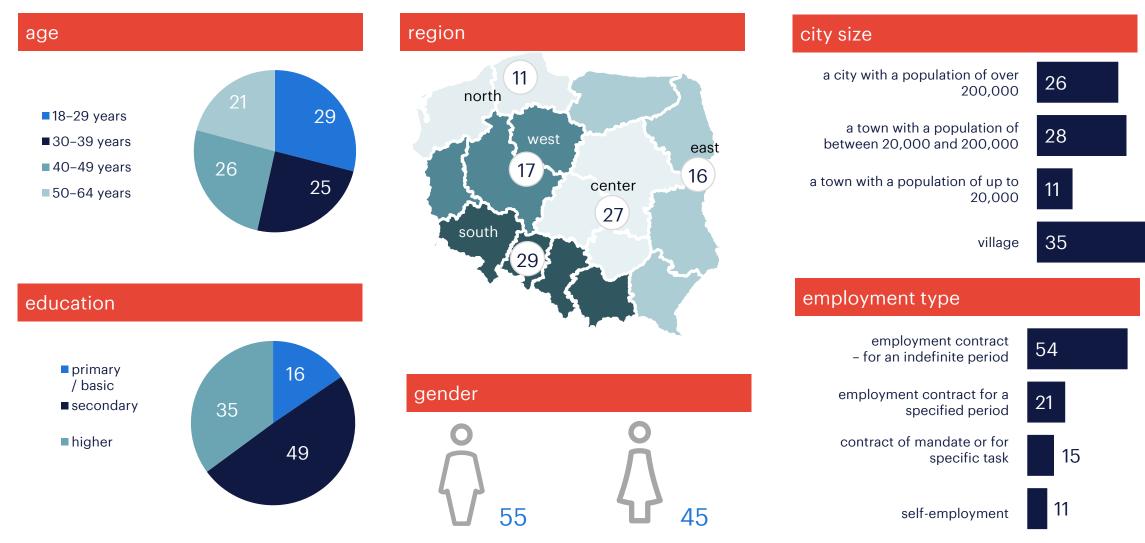
diversity in a workplace	30
social involvement in companies	33
summary	36



study methodology.

respondents	 persons who work at least 24 hours a week, employed under employment contracts, civil law contracts and the self-employed (provided they have a fixed contract for preforming services for a single company). aged 18-64
duration of the survey	7–14 March 2023
technology	CAWI – a computer-assisted web interview conducted via a website on an Internet panel
number of respondents taking part in the survey	1,000 respondents in Q1 2023
sample characteristics	Quota and random sample After the 30th wave (Q4 2017), the structure of the sample has changed
maximum statistical error	+/- 3.1% with N=1000

sample characteristics.



survey results: labor market turnover.

employer or position change. comparison over time and between regions.



Over the last 6 months, have you changed your employer?

Over the last 6 months, have you changed your position with your employer, e.g. due to being promoted or transferred to another department or team?

employer or position change. gender, age, education, agreement type, location type.

woman N=450 man N=550	22 15 21 16	employment contract for an 11 indefinite period (N=542) 17 employment contractfor 42 a specified period (N=205) 13
18-29 years	35	contract of mandate or for specific work (N=145) self-employment (N=108) 13
N=290 30-39 years N=245	20 19 17	
40-49 years N=257	20	a city with a population over 20 200,000 (N=258) 17 a town with a population of 21
50-64 years N=208	° 11	a town with a population of 15 a town with a population of 25
primary/vocational	18	20,000–50,000 (N=96) 20 a town with a population of 19
education N=155	11	up to 20,000 (N=113)
secondary/incomplete higher educationN=494		a village within an 23 agglomeration (N=159) 16
higherN=351	19 24	a village outside of an urban agglomeration (N=186)

employer change
position change with the current employer

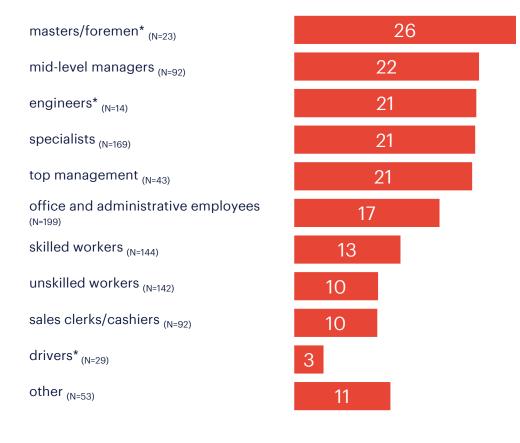
Over the last 6 months, have you changed your employer?

Over the last 6 months, have you changed your position with your employer, e.g. due to being promoted or transferred to another department or team?

employer or position change. comparison between positions.

unskilled workers (N=142)	30
specialists _(N=169)	27
sales clerks/cashiers (N=92)	24
drivers* (N=29)	21
office and administrative employees ^(N=199)	21
skilled workers (N=144)	18
top management _(N=43)	16
engineers* (N=14)	14
masters/foremen* (N=23)	13
mid-level managers (N=92)	11
other _(N=53)	21
employer change position	change with the current employer

Over the last 6 months, have you changed your employer?

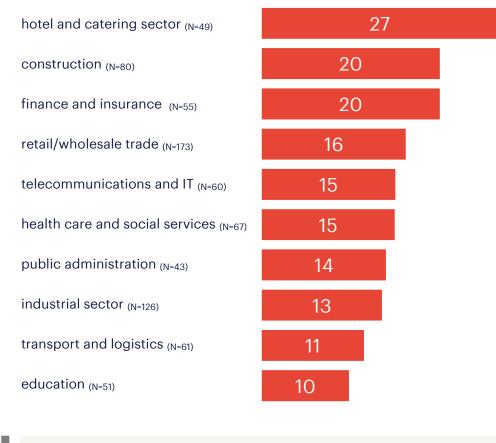


Over the last 6 months, have you changed your position with your employer, e.g. due to being promoted or transferred to another department or team?

*sample size below 30 Total number of respondents (N=1000), 51st Work Monitor, April 2023 | Percentage data | © Randstad | 8

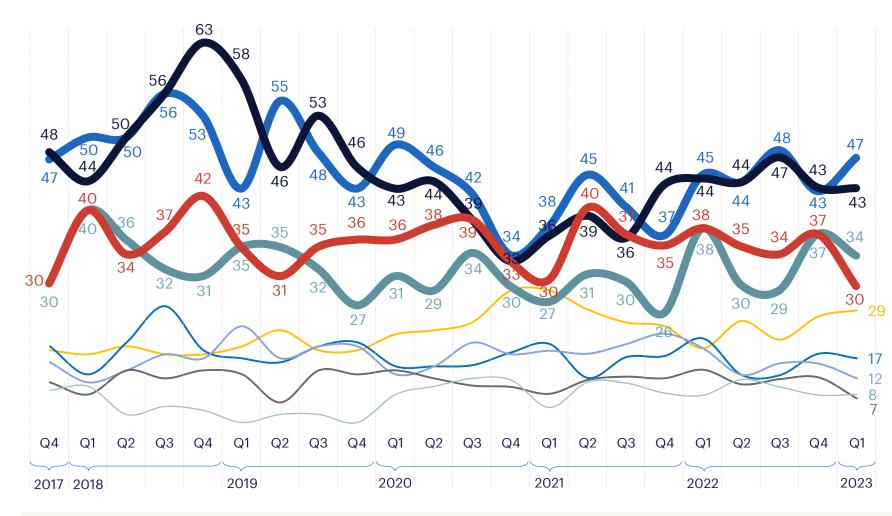
employer or position change. comparison between industries.

hotel and catering sector $(N=49)$	37					
finance and insurance $(N=55)$	25					
health care and social services $_{(N=67)}$	24					
construction (N=80)	23					
retail/wholesale trade (N=173)	21					
telecommunications and IT $_{(\rm N=60)}$	20					
transport and logistics $(N=61)$	20					
public administration (N=43)	19					
education (N=51)	18					
industrial sector (N=126)	17					
■employer change ■ position	change with the current employer					
Over the last 6 months, have you changed your employer?						



Over the last 6 months, have you changed your position with your employer, e.g. due to being promoted or transferred to another department or team?

what is causing the turnover?

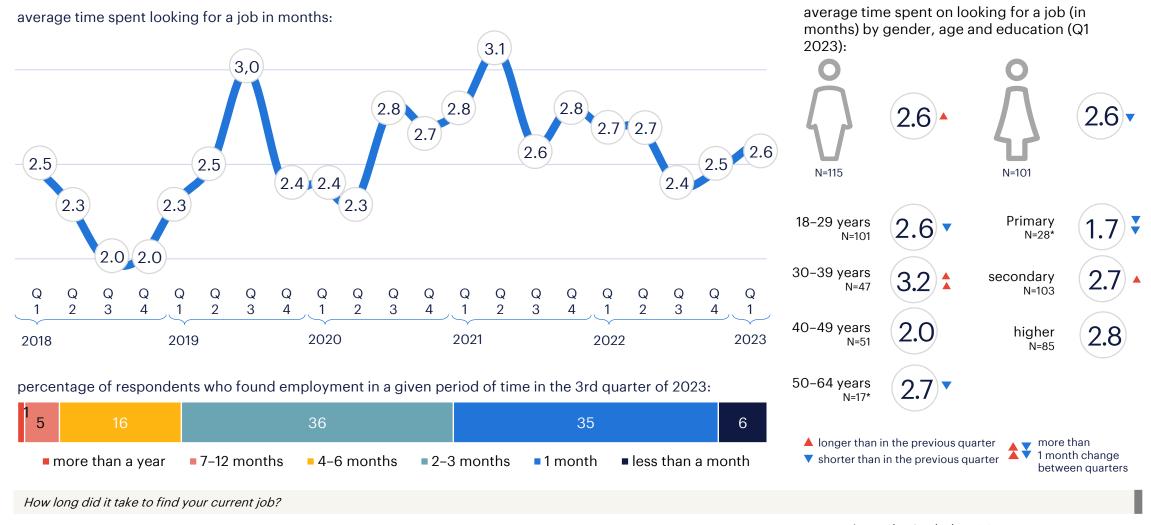


- higher remuneration with the new employer
- need for professional development
- dissatisfaction with the previous employer
- more favorable type of employment with the new one
- I lost my job with my previous employer
- I have worked so long at my previous job that it is high time to change it
- personal reasons
- better benefits at the new job
- other

And what were the reasons for that change?

survey results: how long does it take to find a job.

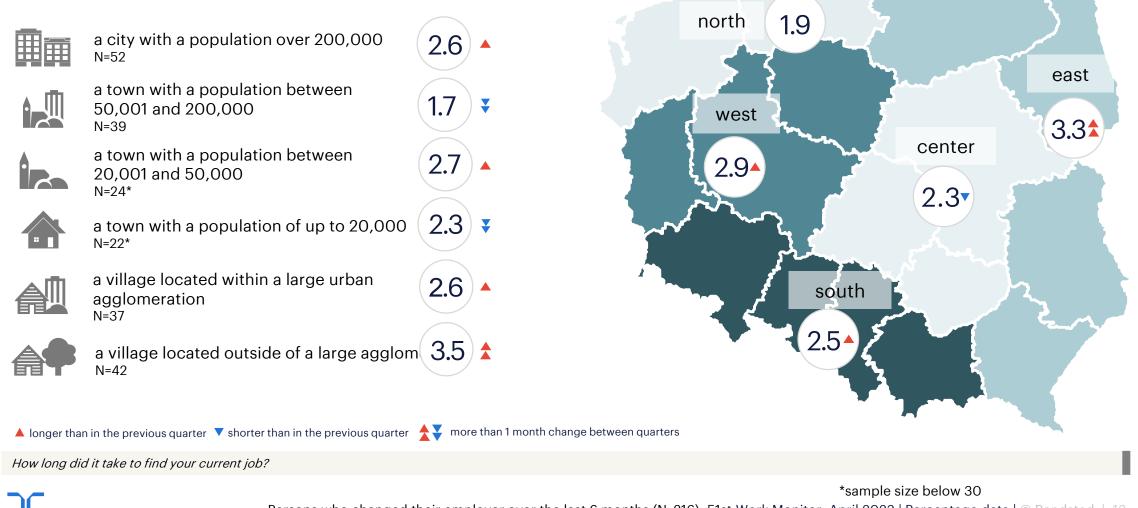
time spent on looking for a job.



*sample size below 30

Persons who changed their employer over the last 6 months (N=216), 51st Work Monitor, April 2023 | Percentage data | © Randstad | 12

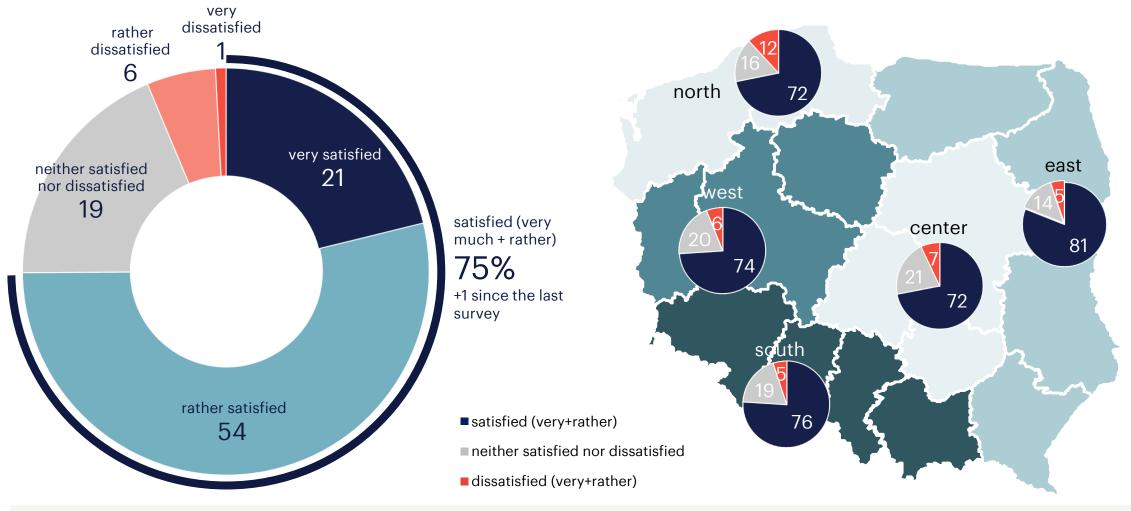
time spent on looking for a job. regions and types of localization.



Persons who changed their employer over the last 6 months (N=216), 51st Work Monitor, April 2023 | Percentage data | © Randstad | 13

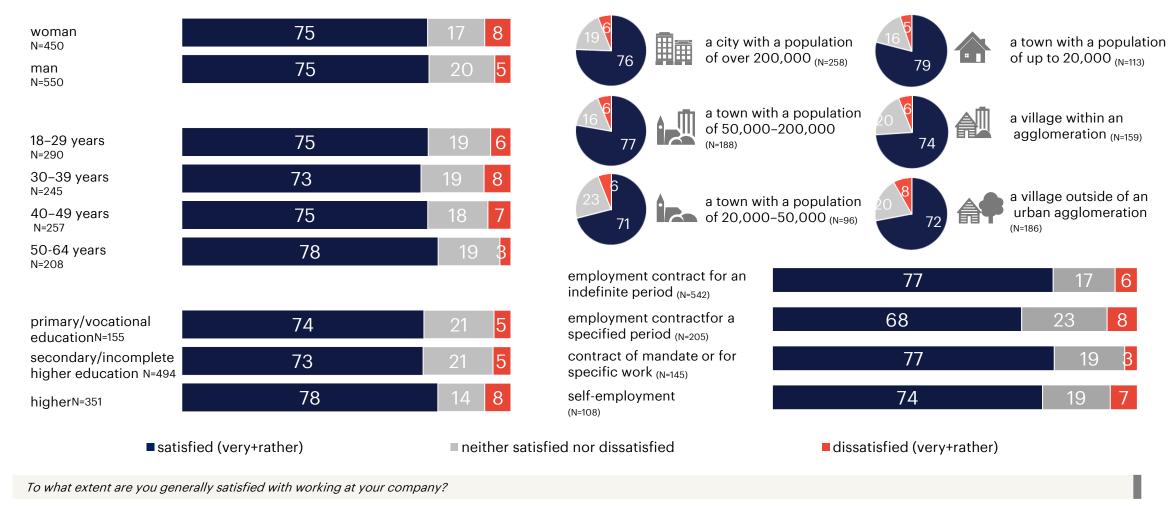
survey results: job satisfaction.

job satisfaction.



To what extent are you generally satisfied with working at your company?

job satisfaction. gender, age, education, employment type, location type.



job satisfaction. comparison between positions and industries.

engineers* (N=14)	86	14	telecommunications and IT $_{(\rm N=60)}$	83	13 <mark>3</mark>
top management (N=43)	84	14 2	education (N=51)	82	8 10
masters/foremen* (N=23)	83	17	health care and social services $(N=67)$	79	16 <mark>4</mark>
mid-level managers (N=92)	80	15 <mark>4</mark>	public administration (N=43)	79	5 16
specialists (N=169)	78	12 9	construction (N=80)	79	18 4
skilled workers (N=144)	76	19 <mark>5</mark>	hotel and catering sector (N=49)	76	16 8
drivers* (N=29)	76	21 3	0 • • • • (1 + 0)		
office and administrative employees (N=199)	75	17 8	retail/wholesale trade _(N=173)	73	21 6
sales clerks/cashiers (N=92)	68	27 <mark>4</mark>	finance and insurance $(N=55)$	71	20 9
unskilled workers (N=142)	61	30 9	industrial sector (N=126)	71	23 6
other position levels (N=53)	85	13 2	transport and logistics $(N=61)$	70	25 <mark>5</mark>
■ satisfied (very+rath	ner)	neither satisfied	nor dissatisfied	dissatisfied (very+rather)	
To what extent are you generally satisfied wi	th working at your compa	21/2			

To what extent are you generally satisfied with working at your company?

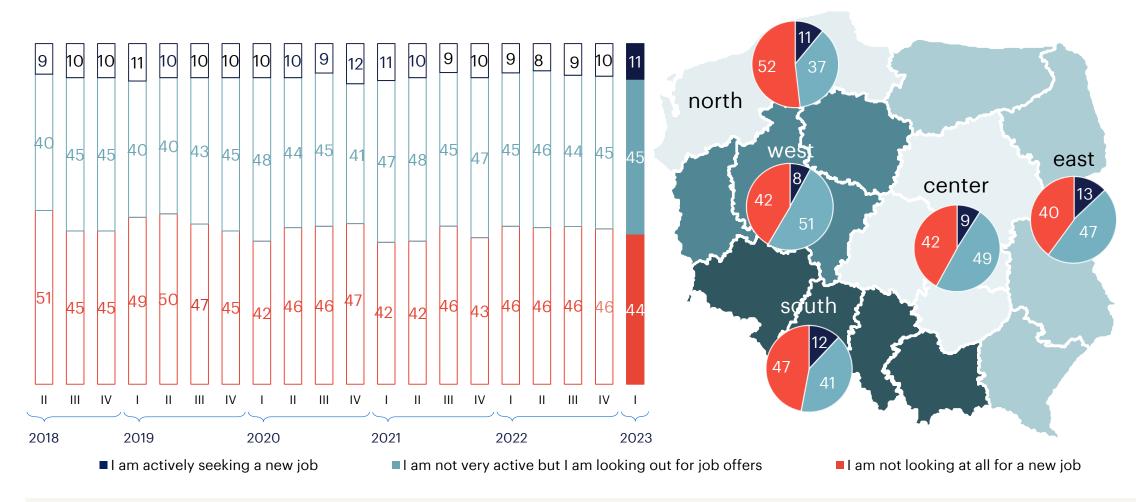
*sample size below 30

The industry graph does not include the "Other industry" category | Total number of respondents (N=1000), 51th Work Monitor, April 2023 | Percentage data | © Randstad | 17

survey results: willingness to change a job.

Y

looking for a new job.



Are you currently actively looking for a job/checking offers not very actively/not looking for a job at all?

looking for a new job. gender, age, education, employment type, location type.

woman N=450 man N=550	11 10	43 47	46 43	41 50 a city with a popul of over 200,000 (N	ation 48 43 43	a town with a population of up to 20,000 (N=113)
18–29 years N=290	15	53	32	43 44 44 44 44 44 44 44 44 44 44 44 44 4	ulation 41 11 00 41 48	a village within an agglomeration (N=159)
30–39 years _{N=245} 40–49 years _{N=257}	12 9	51 42	38 49	48 41 a town with a population of 20,000–50,000	ulation D (N=96) 48 42	a village outside of an urban agglomeration (N=186)
50-64 years N=208	5	33	63	employment contract for an 7 indefinite period (N=542)	45	48
primary/vocational educationN=155		32	56	employment contractfor a 15 specified period (N=205)	47	38
secondary/incompl higher education N=	ete ₌ ₄₉₄ 12	46	43	contract of mandate or for specific work (N=145)	51	32
higherN=351	8	51	41	self-employment 12	38	50
∎ I am acti	ively seekin	g a new job	I am not very active	but I am looking out for job offers	I am not looking at	all for a new job

Are you currently actively looking for a job/checking offers not very actively/not looking for a job at all?

looking for a new job. comparison between positions and industries.

unskilled workers (N=142)	20	38	42	finance and insurance $_{(N=55)}$	18	29	53
top management _(N=43)	16	33	51	hotel and catering sector $_{(N=49)}$	14	57	29
engineers* (N=14)	14	57	29	telecommunications and IT $_{(\rm N=60)}$	10	53	37
sales clerks/cashiers $(N=92)$	13	46	41	public administration (N=43)	9	51	40
mid-level managers (N=92)	12	40	48	retail/wholesale trade _(N=173)	9	44	47
drivers* (N=29)	10	45	45	health care and social services	9	36	55
office and administrative employees ^(N=199)	8	50	42	(N=67)	_		
specialists _(N=169)	7	53	40	education $(N=51)$	8	47	45
skilled workers (N=144)	6	47	47	industrial sector (N=126)	7	47	46
masters/foremen* (N=23)	4	35	61	transport and logistics $(N=61)$	7	49	44
other position levels $_{(N=53)}$	6	42	53	construction (N=80)	5	51	44
I am actively seeking a ne	w job	■I am not	very active but I am lo	ooking out for job offers	l am not	looking at all for	a new job

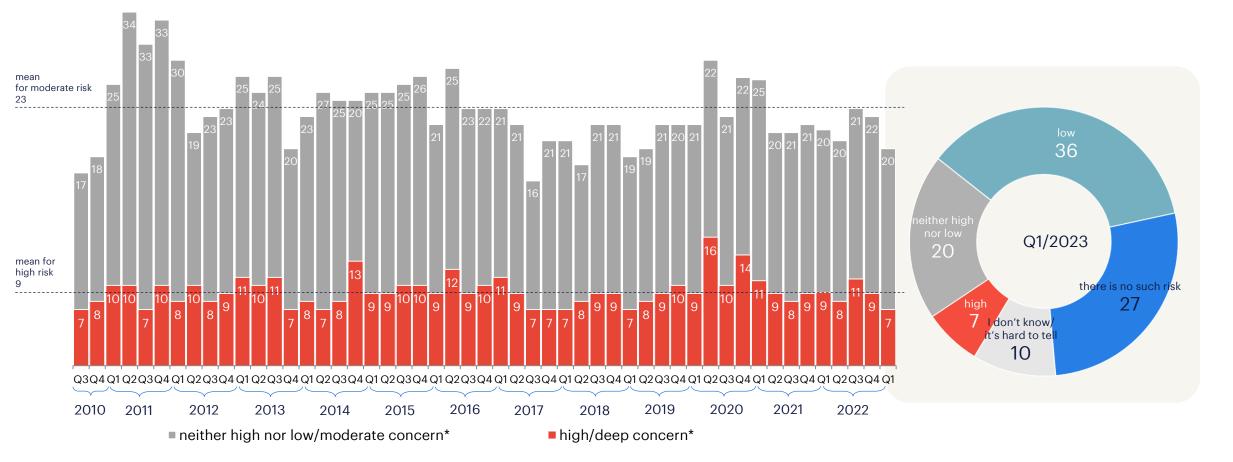
Are you currently actively looking for a job/checking offers not very actively/not looking for a job at all?

*sample size below 30

The industry graph does not include the "Other industry" category | Total number of respondents (N=1000), 51th Work Monitor, April 2023 | Percentage data | © Randstad | 21

survey results: unemployment risk evaluation.

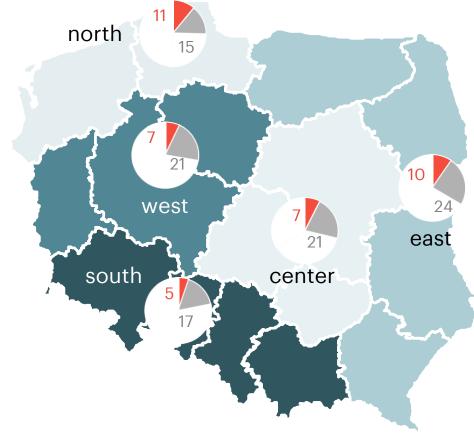
unemployment risk evaluation.



Sometimes people lose their jobs. Do you think that within the next few months you may lose your current job or that your current contract will not be extended? Is the risk related to that... *the wording of the answer until Q3 2017; since Q4 2017, the sample size and the wording of the question have changed

unemployment risk evaluation. gender, age, education, employment type, location type.

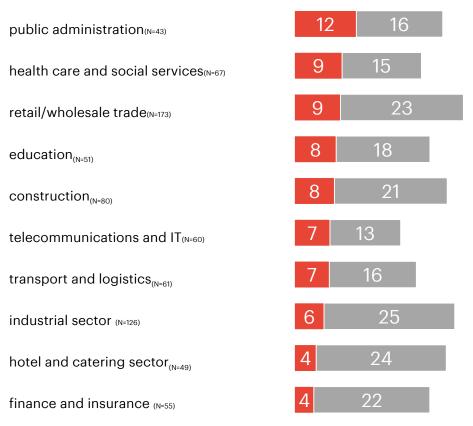
woman N=450	9 18	a city with a population over 200,000 ^(N=258)	7 16
man N=550	6 21	a town with a population of 50,000–200,000 ^(N=188)	8 20
		a town with a population of 20,000–50,000 ^(N=96)	6 24
18–29 years N=290	8 19	a town with a population of up 20,000 (N=113)	7 20
30–39 years N=245	6 19	a village within an agglomeration(N=159)	7 16
40–49 years N=257	7 24	a village outside of an urban agglomeration ^(N=186)	8 23
50–64 years _{N=208}	8 15		
		employment contract for an indefinite period $_{(N=542)}$	5 18
primary/vocational education N=155	<mark>6</mark> 25	employment contractfor a specified period _(N=205)	12 25
secondary/incomplete higher education N=494	8 19	contract of mandate or for specific work $(N=145)$	9 19
higher N=351	7 17	self-employment (N=108)	8 19
■high	r high nor low		



Sometimes people lose their jobs. Do you think that within the next few months you may lose your current job or that your current contract will not be extended? Is the risk related to that...

unemployment risk evaluation. comparison between positions and industries.

sales clerks, cashiers $(N=92)$	12 22
top management ^(N=43)	12 12
unskilled workers(N=142)	10 21
mid-level managers _(N=92)	8 23
engineers* (N=14)	7 29
office and administrative employees $_{\scriptscriptstyle (N=199)}$	7 20
specialists _(N=169)	7 14
masters/foremen* (N=23)	4 22
skilled workers $_{(N=144)}$	4 20
drivers* (N=29)	3 24
other position levels(N=53)	6 23

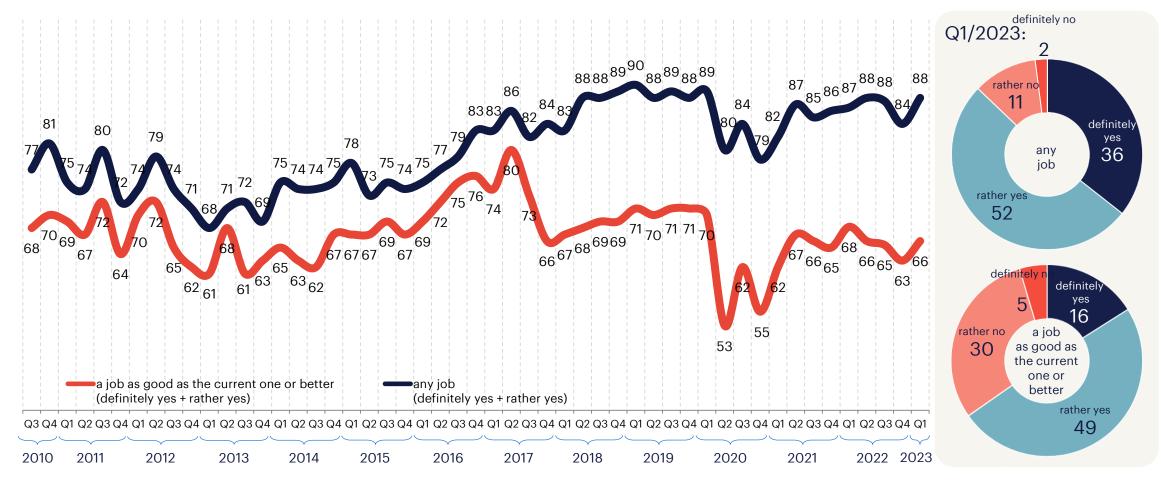


■ high ■ neither high nor low

Sometimes people lose their jobs. Do you think that within the next few months you may lose your current job or that your current contract will not be extended? Is the risk related to that...

survey results: new job opportunities.

chance of finding a new job.



Imagine that at this moment you have to look for another job, with a new employer. Do you think that you will be able to find any job within the next 6 months? And do you think that within the next 6 months you will be able to find a job that is as good as the current one or better? The graph shows the total of "rather yes" and "definitely yes" responses; since Q4 2017, the sample size and the wording of the question have changed

chance of finding a new job. gender, age, education, employment type, location type.

<mark>69</mark>

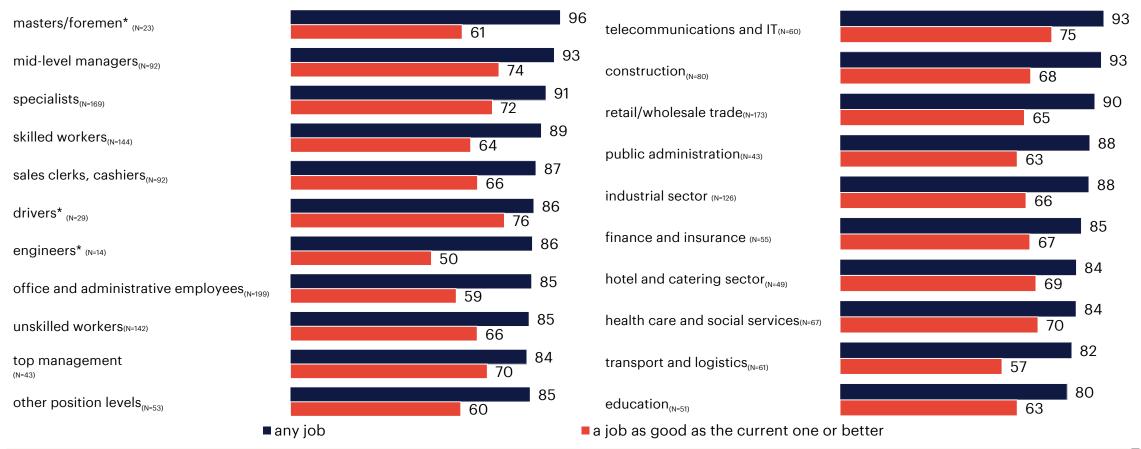
<u>86</u>

woman N=450	86 67	a city with a population over 200,000 ^(N=258)	
man N=550	89 65	a town with a population of 50,000–200,000 (N=188)	
		a town with a population of 20,000–50,000 (N=96)	
18–29 years N=290	92 70	a town with a population of up to 20,000 (N=113)	
30–39 years N=245	<u>90</u> 70	a village within an agglomeration ^(N=159)	
40–49 years N=257	88 64	a village outside of an urban agglomeration(N=186)	
50–64 years N=208	79 57		
		employment contract for an indefinite period _(N=542)	
primary/vocational education N=155	<u>85</u> 67	employment contractfor a specified period (N=205)	
secondary/incomplete higher educationN=494	<u>88</u> 64	contract of mandate or for specific work _(N=145)	
higher N=351	<u>89</u> 68	self-employment (N=108)	
∎any job	a job as good as the current one or better		

north west center south east

Imagine that at this moment you have to look for another job, with a new employer. Do you think that you will be able to find any job within the next 6 months? And do you think that within the next 6 months you will be able to find a job that is as good as the current one or better? The graph shows the total of "rather yes" and "definitely yes" responses

chance of finding a new job. comparison between positions and sectors.



Imagine that at this moment you have to look for another job, with a new employer. Do you think that you will be able to find any job within the next 6 months? And do you think that within the next 6 months you will be able to find a job that is as good as the current one or better? The graph shows the total of "rather yes" and "definitely yes" responses. The graph does not include the "other sector" category.

*sample size below 30

survey results: diversity in a workplace.

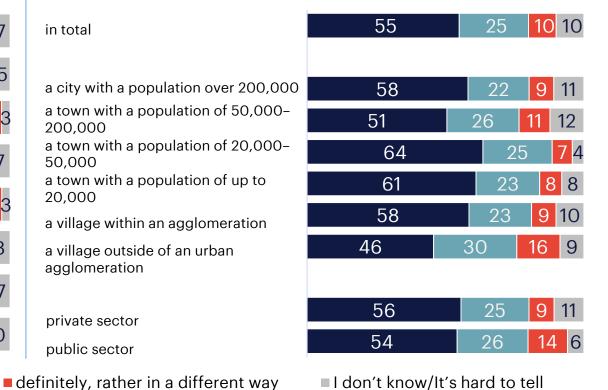
Y

diversity in a workplace.

are people in your workplace treated in the same way regardless of their...?

denomination	75	12 7 7
nationality	74	11 9 5
gender	74	11 12 3
ethnic origin / skin color	73	12 7 7
age	70	13 <mark>14</mark> 3
being able bodied (as per the attitude towards persons with disabilities)	69	13 10 8
socio-political views	69	16 9 7
sexual orientation	65	16 8 10
■ definitely + rather in the same	e way I neither yes	nor no 🔳 de

does your employer encourage the development of the open organization culture, promote diversity & inclusion?



Do you believe that in your workplace all employees are treated in the same way by the employer and their supervisors regardless of their... Do you believe your employer encourages the development of an open organization culture in the workplace, that is they promote diversity, inclusion and tolerance?

in total

200,000

50,000

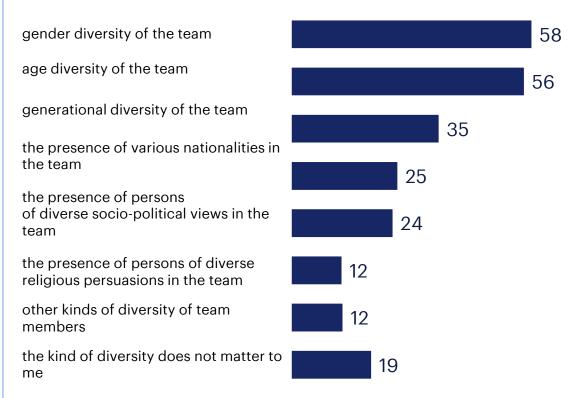
20,000

diversity in a workplace.

do you value diversity in a workplace?

in total	63	26 57	
women	68	21 4 8	
men	59	29 57	
18-29 years	60	27 58	
30–39 years	62	22 8 8	
40-49 years	61	30 6	
50-64 years	69	23 26	
primary/vocational education	61	23 6 10	
secondary/incomplete higher	63	27 47	
education higher	63	26 <mark>5</mark> 6	
■ definitely + rather in the same way	■ neither yes nor no		
definitely, rather in a different way	■I don't know/It's hard to tell		

what kind of diversity do you particularly appreciate in a workplace?



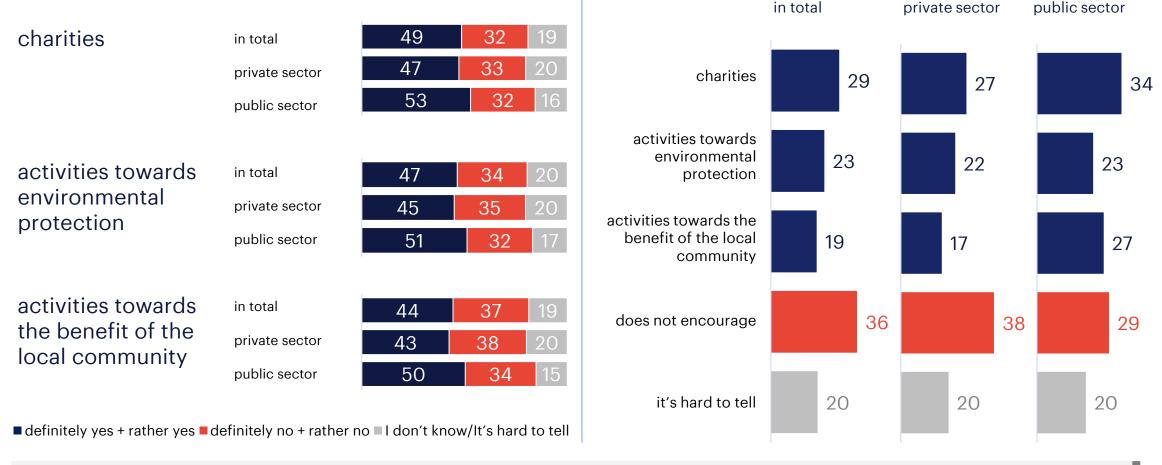
How much do you value or not value diversity in the workplace, such as the presence of people of diverse generations, nationalities or genders? What kind of diversity in a workplace do you value? List a maximum of 3 characteristics where diversity is important to you

survey results: social involvement in companies.



social involvement in companies.

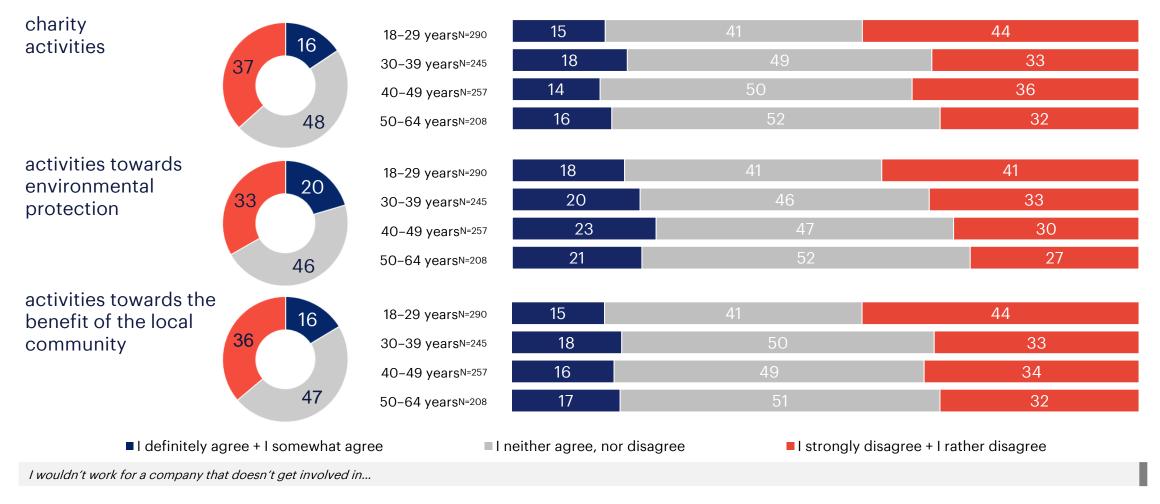
does your employer get involved in...



Does your employer get involved in community activities? Does your employer encourage you to participate in community activities, and if yes, what kind?

does your employer encourage you to participate in...

would you work for a company which does not get involved in...



survey results: summary of the results.

Y

summary of the results (1/2)

- 22% of the employees changed job in the last six months (a slight increase: by 2 percentage points) = persons up to 29 yeas of age changed their employer significantly more often (35%); the least often the employees aged 50–64 (8%) = those to declare the change of the job the most often were unskilled workers (30%) and the hotel and catering sector workers (37%)
- the reasons indicated for changing one's job the most frequently are: the higher remuneration with the new employer (47%, increase by 4 percentage points) and the desire for professional development (43%) I further on the list are: being unhappy with the current employer (34%) and the more favorable employment form (30%) both latter ones lost in significance
- 16% of employees declared changing their position at the same employer (decrease by 3 percentage points) I higher-educated employees and specialists changed job titles more often (19% and 21%, respectively)
- 75% of employees were very or rather satisfied with their jobs 11% of the respondents are actively seeking a new job (increase by 1 pp), and 45% are looking out for offers the average time spent on looking for a job increased slightly, to 2,6 months
- we can observe a slight downward trend in the fear employees have about losing their job the percentage of high level of fear declared dropped from 11% during the peak of 2022 down to 7% currently persons employed for a specified period are significantly more often afraid of losing their job (12% high level of fear, 25% moderate fear), skilled workers are significantly less often afraid of losing their job (4%) and higher education specialists are moderately often afraid (14%)
- the percentage of employees who see the chances of finding any job within the next 6 months increased (increase from 84% to 88%) = those seeing the chances of finding any employment significantly more often include the younger employees (ages 18–29; 92%), employees working for a specified period (92%), and among professions mid-level managers (93%)
- 66% of employees, a percentage comparable with that from previous quarter (63%), believe that they would find a job that is as good as the current one or better older employees 50–64 years of age (57%), people living in the eastern region (58%), in villages outside large agglomerations (59%), and among the studied professions office and administrative employees (59%) are significantly less convinced of this.

summary of the results (2/2)

- a predominant majority of employees declares that in their workplace everyone is treated in the same way regardless of their religion (75%), nationality (74%), gender (74%) or their skin color / ethnic origin (73%) for most characteristics, pointing towards a different treatment in the workplace is below 10%, apart from the age 14% declared different treatment in this regard, and gender 12%
- over a half of employees feel that their employer promotes diversity & inclusion in the workplace (55%), while this is significantly less common in the villages outside of the large agglomerations (46%)
- over a half of employees appreciate diversity in a workplace (63%); older employees 50–64 years of age (69%) and women (68%) do it significantly more often
 gender diversity and age diversity of teams are most commonly appreciated (58% and 56% respectively)
- in the opinion of the employees, nearly a half of employers gets involved in charity activities (49%) or activities towards environmental protection (47%) = 44% of employers get involved in activities towards the benefit of the local community, with the public sector organizations doing it significantly more often (50%) = however, employers relatively seldom encourage employees to get involved in such activities: 36% do not encourage employees at all in the public sector 29%, and in the private sector 38% = public sector employers more often encourage employees to get involved in charities (34%) and activities towards the benefit of the local community (27%)
- for the employees themselves, the involvement of their employer in charity activities, activities towards environmental protection or the benefit of the local community is not crucial for the decision of taking up the job only 16% take the involvement of the employer in charity activities or activities towards the benefit of the local community into consideration while deciding about taking the job; sightly more 20% declare they would opt against taking up a job for

the organization which does not get involved in activities towards environmental protection

Randstad in numbers

17,600

107

employees hired by us go to work every day

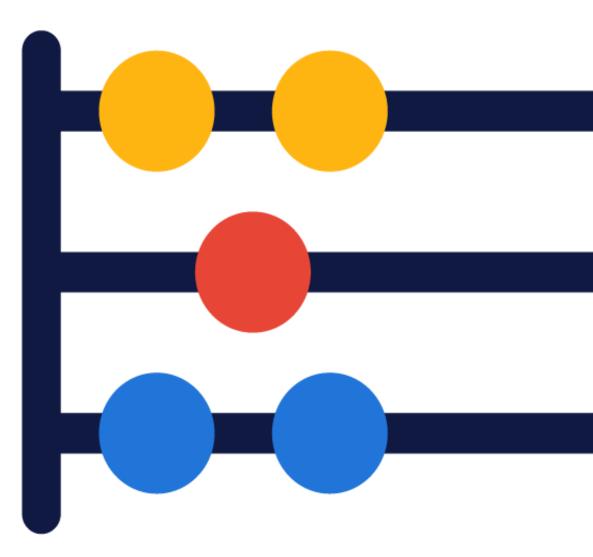
offices in Poland

2,754

recruitments annually

1485

customers



randstad

human forward.

