



Think Tank: Industry Analysis

Overview

Think Resources, a Randstad company specializing in the sourcing and placement of engineering and technical professionals, has launched its new *Think Tank* survey exploring the impact of the economic recession and attitudes on recovery. As a supplement to the original executive summary, Think is releasing an industry overview, comparing the findings within a variety of industries including aerospace and defense, electronics, construction, energy and utilities, engineering consulting, manufacturing, and oil and gas.

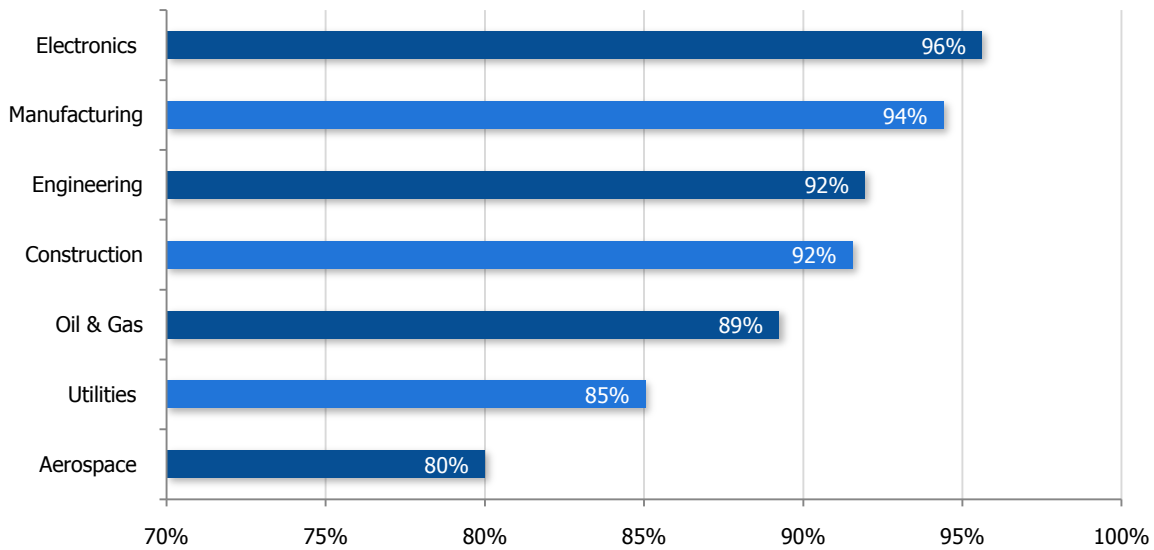
The survey, which was conducted in November and December 2009, probes how executives, managers and technicians in core engineering industries are feeling about the economy, hiring and job security. Survey data reveals insights from more than 2,300 respondents.

Economic Downturn & Layoffs

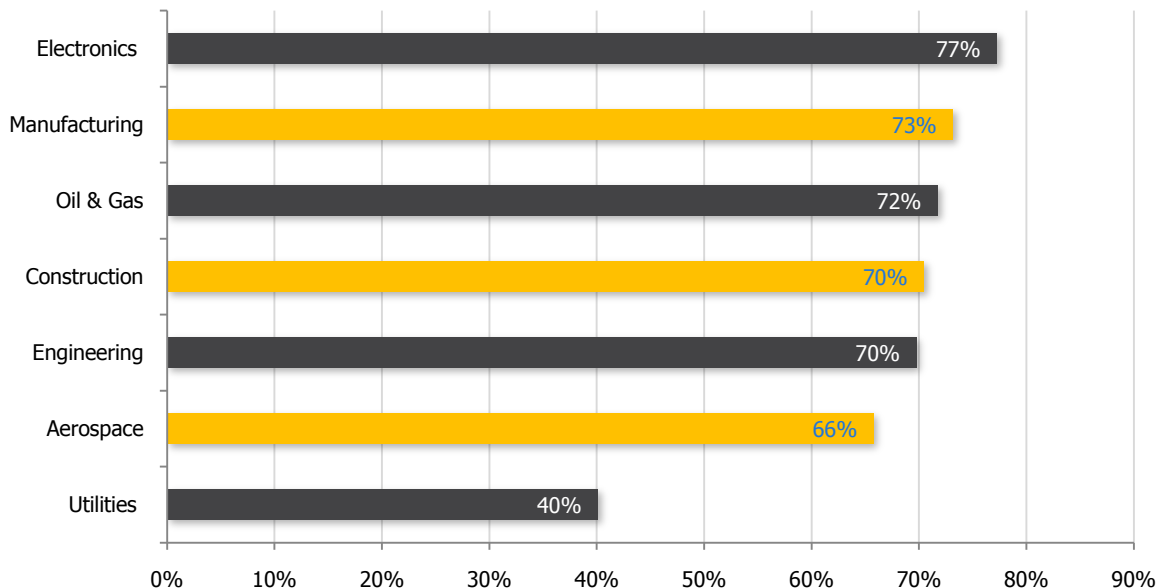
While it is true that 90% of survey respondents reported being negatively affected by the economic downturn, not all industries were affected equally. The data below suggests that all but two of the spotlighted industries experienced the full blow of the economic downturn in 2009, with industries that normally are less prone to fluctuations in demand (Utilities) more likely to remain untouched.

However, it is interesting to note that while 85% of Energy and Utilities respondents claimed to be affected by the downturn, only 40% reported layoffs at their company.

Percentage of Respondents Who Experienced Economic Downturn - by Industry



Percentage of Respondents Who Witnessed Layoffs During the Downturn - by Industry

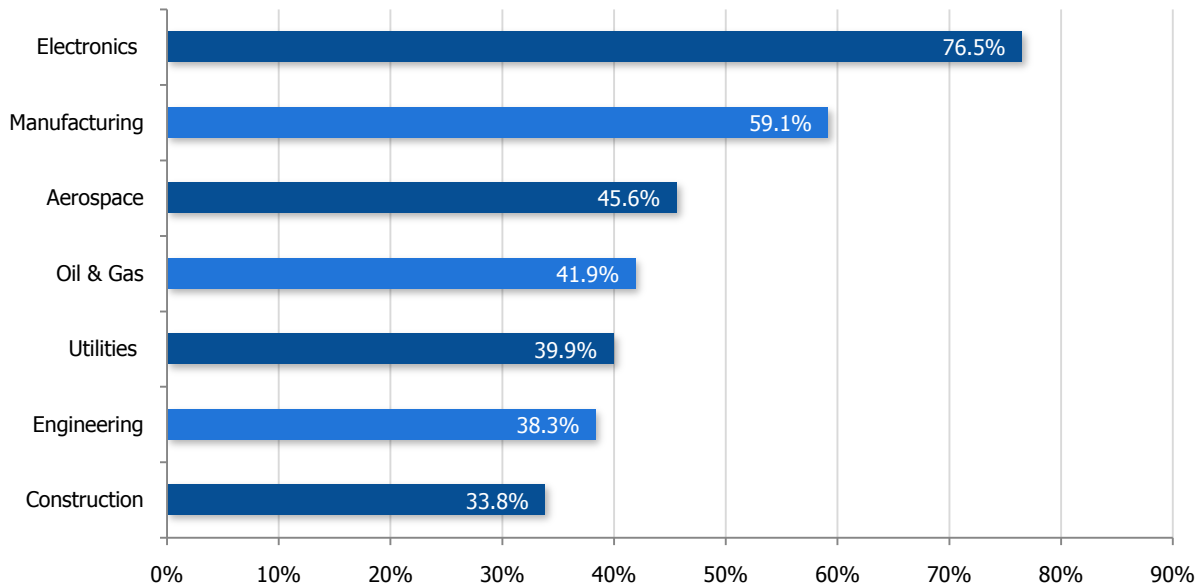


Economic Recovery & Hiring

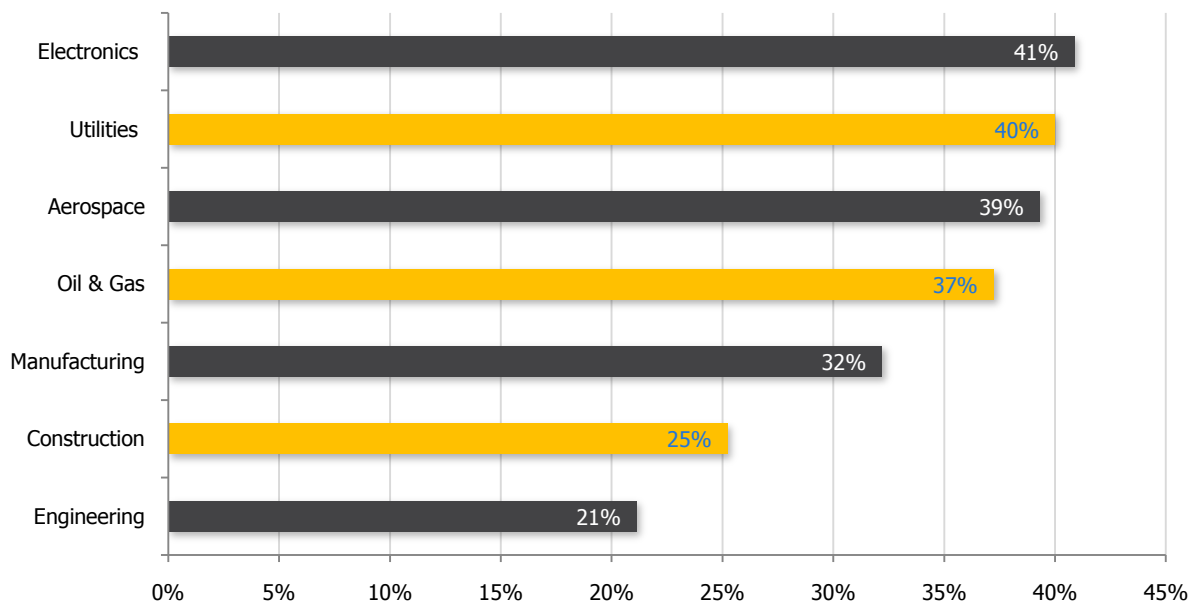
Just as the downturn affected various industries differently, recovery is also being experienced by some more than others. And while the overall survey data shows that almost half (47%) of respondents are reporting signs of economic recovery, this did not necessarily signal a return to hiring.

Interestingly, both the Electronics and Manufacturing industries experienced significant impacts including layoffs during the downturn, however respondents from those industries are reporting more signs of recovery.

Percentage of Respondents Experiencing Economic Recovery - by Industry



Percentage of Respondents Whose Companies Were Hiring - by Industry

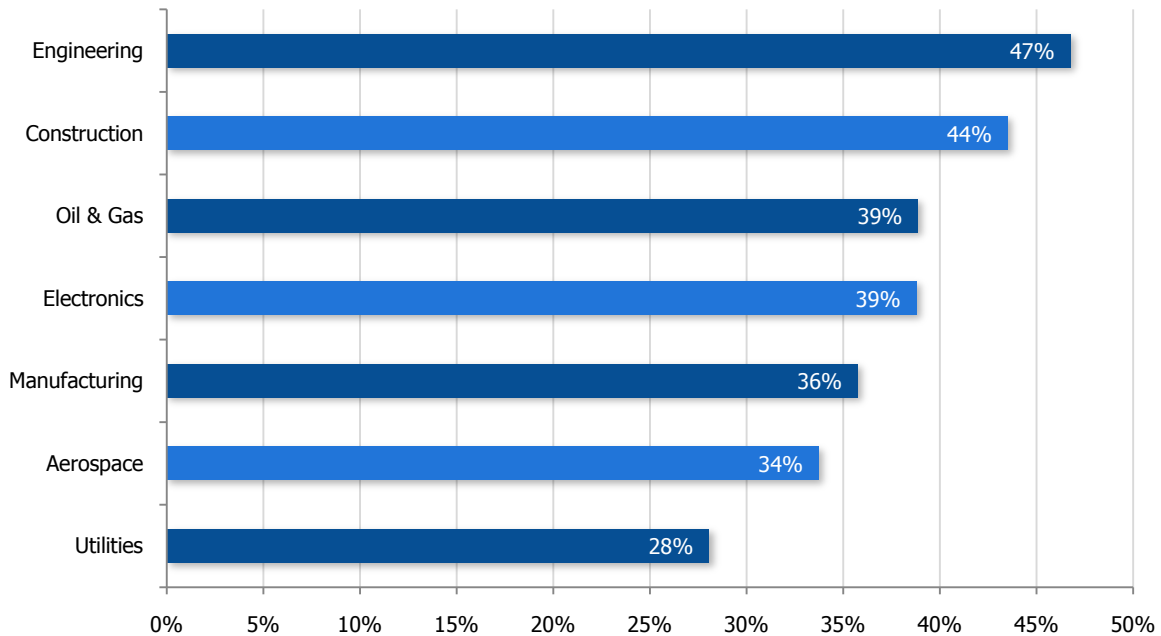


Job Security

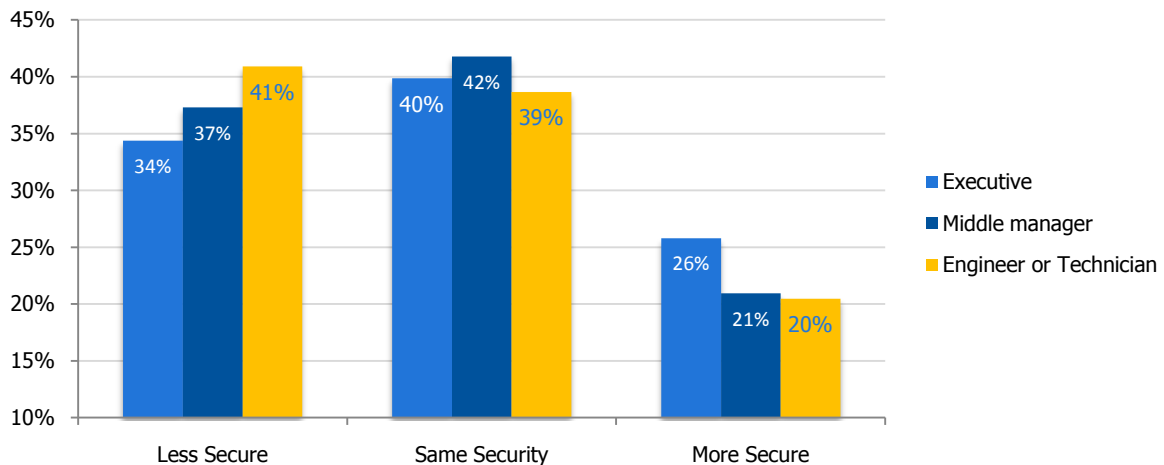
Although several industries do seem to be turning a corner and heading into recovery, 37% of respondents who participated in the Think Tank survey still felt that their job security was higher in May of 2009 than it is today, with 41% of Engineers and Technicians still feeling the pinch.

It may also be interesting to note that although an industry may be showing signs of recovery, increased job security is far more likely to exist in industries that are beginning to hire.

Percentage of Respondents Who Rated Their Current Job Security as "less secure than 6 months ago" - by Industry



How different levels of management rate their job security



Methodology

The *Think Tank* survey was conducted online within the United States by Think Resources, a Randstad company, between November 19, 2009 and December 2, 2009. More than 2,300 participants representing a cross section of companies, titles and geographies in core engineering sectors, including aerospace and defense, electronics, construction, energy and utilities, engineering consulting, manufacturing, environmental services, oil and gas, transportation services and telecommunications provided insight into attitudes toward the economy, hiring and job security.