

China Talent-Flow Survey 2013

中国人才流动调查报告 2013

2nd Edition

China
中國
2013

罗迈国际市场调研中心

RMG Selection Market Research Center

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前言

与 2012 年初相比，今年年初许多行业招聘工作的预热过程都呈现出相对缓慢的趋势。由于诸多本土企业和国际公司对于开放新职位和招聘替换职位时非常谨慎，这种缓慢的趋势也贯穿了 2013 年的第一和第二季度。



尽管如此，我们还是在罗迈国际商务咨询公司进行的第一期《中国人才流动调查报告》（TFS1）中提及了一些有趣的中国人才市场的现象和动态。我认为主要包括以下几点：

“人才西行”。越来越多的公司发现发展商机与中国东海岸的那些大城市甚至是巨型城市已经渐行渐远了。曾经被贴上“无技能”标签的蓝领阶级现今都具备了某种技术或技能，他们对于薪金待遇和生活水平的要求在逐渐上升，而且不想远离家乡对他们来说也变得至关重要。

第一期报告中的另一个的发现是去年各个行业招聘情况呈现出参差不齐的状况。年初，一些行业的招聘情况进展得非常缓慢，相比之下，某些行业的招聘需求显得非常乐观。

在报告中有趣的发现确实太多了，主要的部分涉及到人们如何找新工作，为什么换工作，以及什么时机换工作。关于跳槽这个主旋律，第一期《中国人才流动调查报告》中收集了很多重要的数据。在第二期报告中，我们又继续收集了相关数据，并进行了更加详细的分析与扩展。

关于第二期《中国人才流动调查报告》，我们不仅深入分析了关于人才跳槽动机，人才流动和猎头人才关系，本次调查还发现了一些流行行业和城市的变化趋势。例如，媒体和地产行业仍处在一些招聘活动最活跃行业的行列中。这其实是一个很有趣的问题，尤其是考虑到我们已经谈论了多年的由于政府借贷及地产行业泡沫所引起的房价价格虚高问题。同时，我们还发现来自成都的 70% 调查参与者都经历了跳槽。

除了本期报告中的这些主要发现，罗迈国际也看到了第三和第四季度招聘市场的稳固。许多之前空缺的职位现在都找到了合适的人选任职，这在一些高端职位上尤为明显。这当然与英国和欧洲的稳定状况以及美国对风险容量上升的控制有明确关系。

如果你对于本次调查有任何问题或者反馈，欢迎通过我的邮箱联系我 robert.parkinson@rmgselection.com



Introduction



The year 2013 started relatively sluggishly in many recruiting sectors compared with the beginning of 2012, and this sluggishness continued for the first and second quarters with many local and international companies exercising caution with respect to new hiring and replacement recruitment.

However it is worth noting that the first edition of RMG's talent flow survey (TFS1) reported a number of very interesting findings and developments in the job market, which included:

- Going West – more companies are exploring expansion opportunities away from the East-Coast metropolises and 'mega-cities' of Central China. Blue-collar workers who would once be regarded as unskilled are now skilled, and demand better wages and living conditions and, crucially, jobs nearer their home-towns and

families.

- The second finding from TFS1 was the lack of consistency between industry sectors. Some sectors started the year sluggishly, whereas some bucked the trend with an optimistic hiring outlook.
- There were many other interesting findings in TFS1. Key points concerned how, why, and when people would look for a new job. TFS1 contained some important data on this subject which has been followed up and expanded upon in TFS2.

So now to the new Edition: RMG China Talent Flow-Survey Edition 2. In addition to more useful data on employee motivation, movement and engagement with headhunters we have identified some interesting trends in 'hot' industries and cities. Media and Real-Estate, for example, are still some of the most buoyant industry sectors hiring. This is interesting, particularly in terms of real-estate after years of talk about inflation caused by local government loans and a resulting real-estate bubble. We also discovered that of those surveyed in Chengdu over 70% had changed jobs, for example.

In addition to the findings of the TFS2, RMG sees a much more solid hiring market in the Third and Fourth quarters: Many more positions that have been on hold are now being filled and this expansion has been particularly apparent at a senior level. Clearly as the UK and Europe stabilize and as the US manages to keep dodging the cliff appetite for risk is rising.

If you have any comments or questions about this survey, don't hesitate to contact me via robert.parkinson@rmgselection.com – I would be delighted to hear from you.

Sincerely,

Robert Parkinson
CEO & Founder

主要发现

市场概述

- 就业市场保持活跃，近 4 成人在近 12 个月更换工作
- 媒体、公关、地产、农林行业均有超半数人跳槽
- 建筑、创意人才在市场上活跃度大幅提升
- 成都人才活跃度比去年上升 3 成
- 90 后跳槽比例高达 43%
- 6 成 MBA 准备换工作，仅 3 成成功

流动增值

- 薪酬仍为人才吸引力头把交椅
- 公司文化和管理风格成为留人关键
- 两性职场需求进一步一致，体现女性社会地位增强
- 薪酬福利吸引力随年龄减小，公司文化吸引力则随年龄增强
- 20%-50%的加薪幅度是人才普遍的心理期待

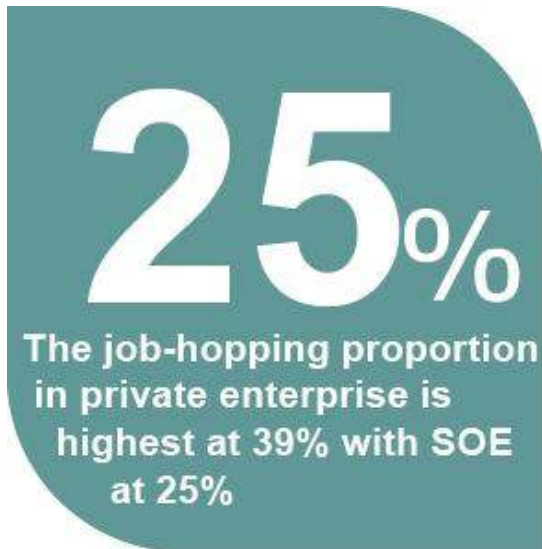
流动方向及方式

- 希望到二线城市工作的人才比例上升 16%，已与一线城市持平
- 女性更倾向于一线城市，比男性高出 10 个百分点
- 招聘会的吸引力下降到 1%以下
- 猎头仍是最受青睐的换工作途径
- 国有企业使用猎头的比例从去年的 35%上升到今年的 57.14%。
- 前 20%人才才能遭到猎头紧盯
- 私有企业中更容易获得朋友推荐
- 网上更新简历人数再创新高，已超 6 成
- 学历越高在网上更新简历越积极，超 7 成博士 2013 年更新简历

25%

私有企业跳槽比例最高39%，国企为25%

Key Findings



Market Landscape

- The employment market is still active: over 25% of people changed jobs in the last 12 months.
- More than 50% of employees in media, PR, real estate, and agriculture have changed jobs.
- The construction and creative employment market activity increased substantially.
- The activity of Chengdu employment prospects increased 30% compared with last year.
- The job-hopping rate of employees who were born in 1990s surged to 43%.
- 60% of MBAs are planning to change jobs, but only 30% succeed.

Key Decision Making Points

- Salary is still a key driver of change.
- Company culture and leadership style play key roles in keeping talent.
- The decision making points of both men and women are equalising showing that women are advancing in the workplace.
- Attractions of wage and benefit decrease with age, but the attraction of company culture increases with age.
- Talented people normally expect a wage hike range from 20% to 50%.

Direction of talent flow (geographically, company type, and method)

- Proportion of people who intend to move to second-tier cities rose 16%, which almost equals that in first-tier cities.
- Females prefer first-tier cities 10% more than males.
- The attraction of recruitment fairs went down to less than 1%.
- Using a job-hunter is still the most popular way to change job.
- The percentage of state-owned enterprise cooperating with job-hunters grew from last year from 35% to 57.14%.
- The top 20% of talented people could be tracked by headhunters.
- Easier to have a friend recommended in the private firms.
- Record-breaking CV update online has exceeded 60%.
- Those with higher degrees, more frequently their update CVs. More than 70% of those with doctorates renew their CVs regularly.

对雇主的建议

- 2013 职行业排名 (12)
- 吸引人才方法论 (30)
- 女性领导力 (32)
- 挖人涨薪幅度 (47)
- 二三线城市人才拓展 (52)
- 还去不去招聘会 (57)
- 招聘途径比较 (59)
- 有多少你的员工正在考虑离职 (62)
- 招不招 MBA (68)

对求职者的建议

- 2013 热门行业下 (14)
- 2013 热门职能下 (16)
- 职业发展中的需求变化 (34)
- 跳槽薪水涨多少 (47)
- 优质二线城市 (52)
- 2013 招聘热点城市 (53)
- 朋友推荐靠谱吗 (57)
- MBA 值多少 (68)
- 如何获得猎头关注 (83)

Suggestions to employers

- Ranking resignation list by industries 2013 (12)
- Methodology to attract talent (30)
- Female leadership power (32)
- Retain talent salary increase range (47)
- Talent development in tier 2 and tier 3 cities (52)
- Go to recruitment fair or not (57)
- The best recruiting method (59)
- How many employees in your company are considering changing job? (62)
- Hire MBA or not (68)

Suggestions to employees

- Popular industries in 2013 (14)
- Popular functions in 2013 (16)
- Demand variations of career development (34)
- How much salary increase should you expect when changing job (47)
- Tier 2 cities with high quality (52)
- Hotspot cities in 2013 (53)
- Is friend recommendation reliable (57)
- How much does MBA worth (68)
- How could be attractive by headhunter (83)

调查背景 Survey Background

调查流程 Survey Procedure

这是我们如何完成这项调查：

Methods of collecting survey data:

- **数据收集期:** 2013年7月 — 2013年10月
- **Collecting Period:** July 2013 – October 2013
- **数据来源:** 在线调查及电话访问
- **Data Source:** Online survey and telephone survey
- **原始数据收集:** 3915
- **Initial Samples:** 3915
- **数据筛选:** 删除重复、未完成及不合格数据
- **Data Selection:** Remove duplicated, unfinished, and invalid data
- **最终样本:** 3847
- **Final Samples:** 3847

调查样本 Survey Sample

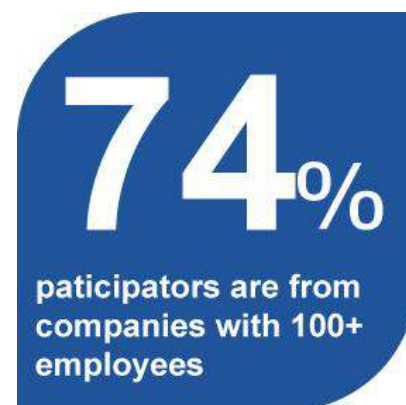
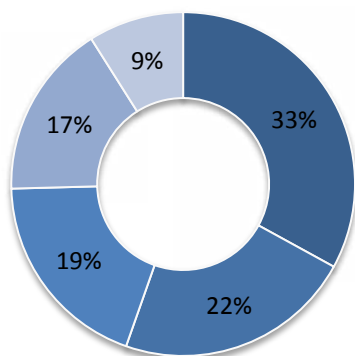
这是我们的样本来源分析。

Those are where the survey's participants came from.

- **公司规模 Company Size**

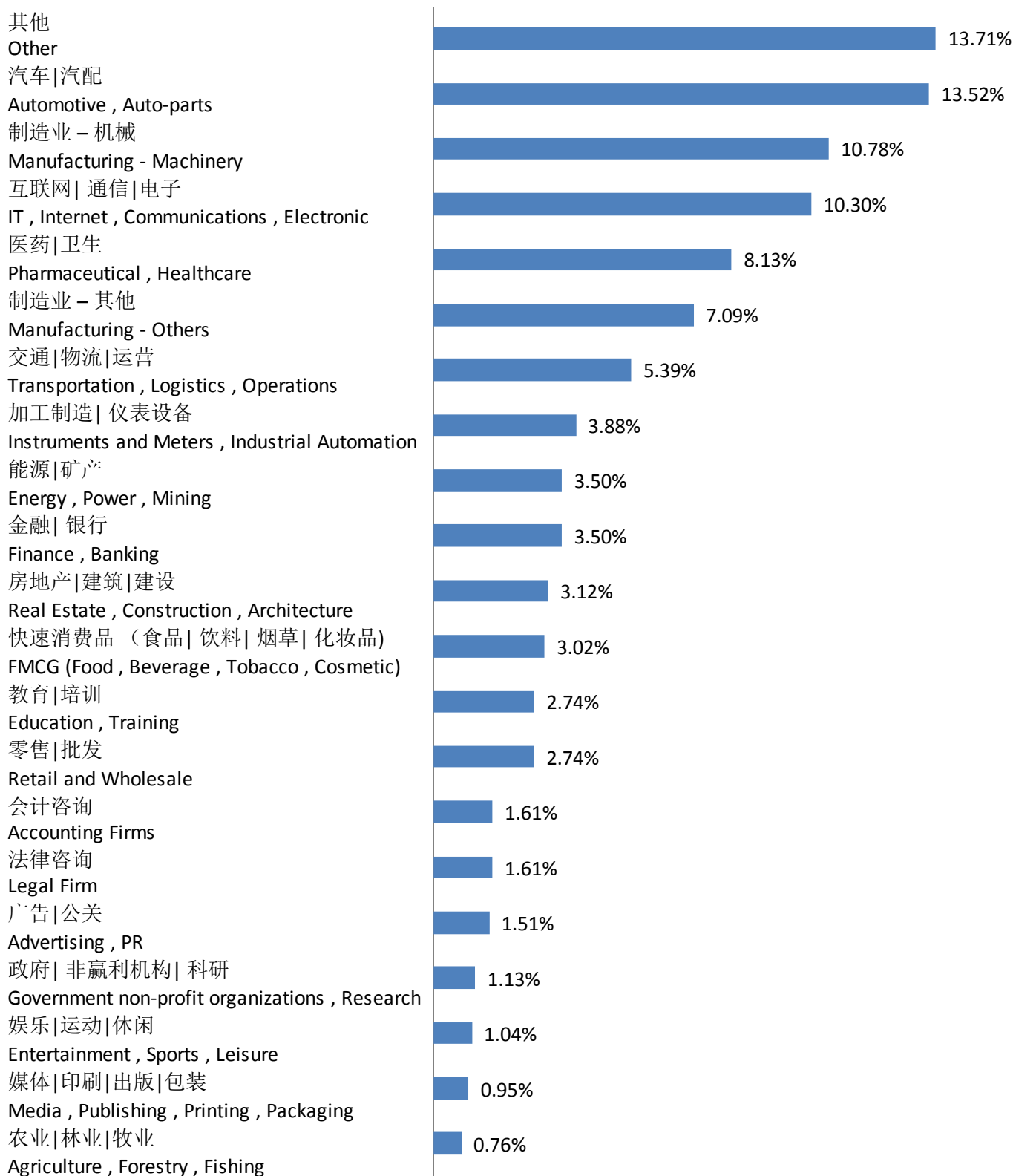
图一 调查样本来源公司规模 Figure 1 - Survey samples categories by company size

■ 100~999 ■ 1000~4999 ■ 5000+ ■ 0~49 ■ 50~99



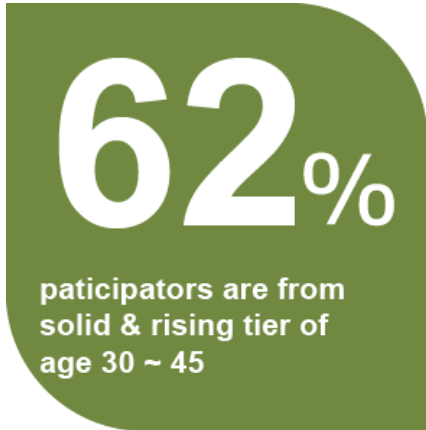
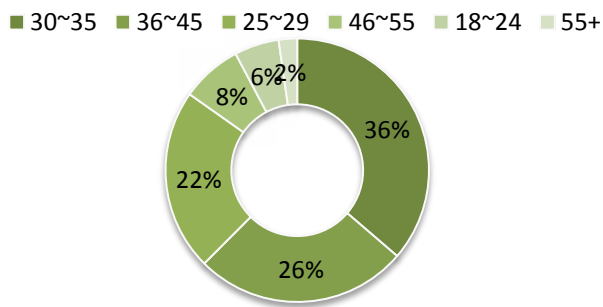
• 行业 Industries

图二 调查样本来源行业分类 Figure 2 - Survey samples categories by industries



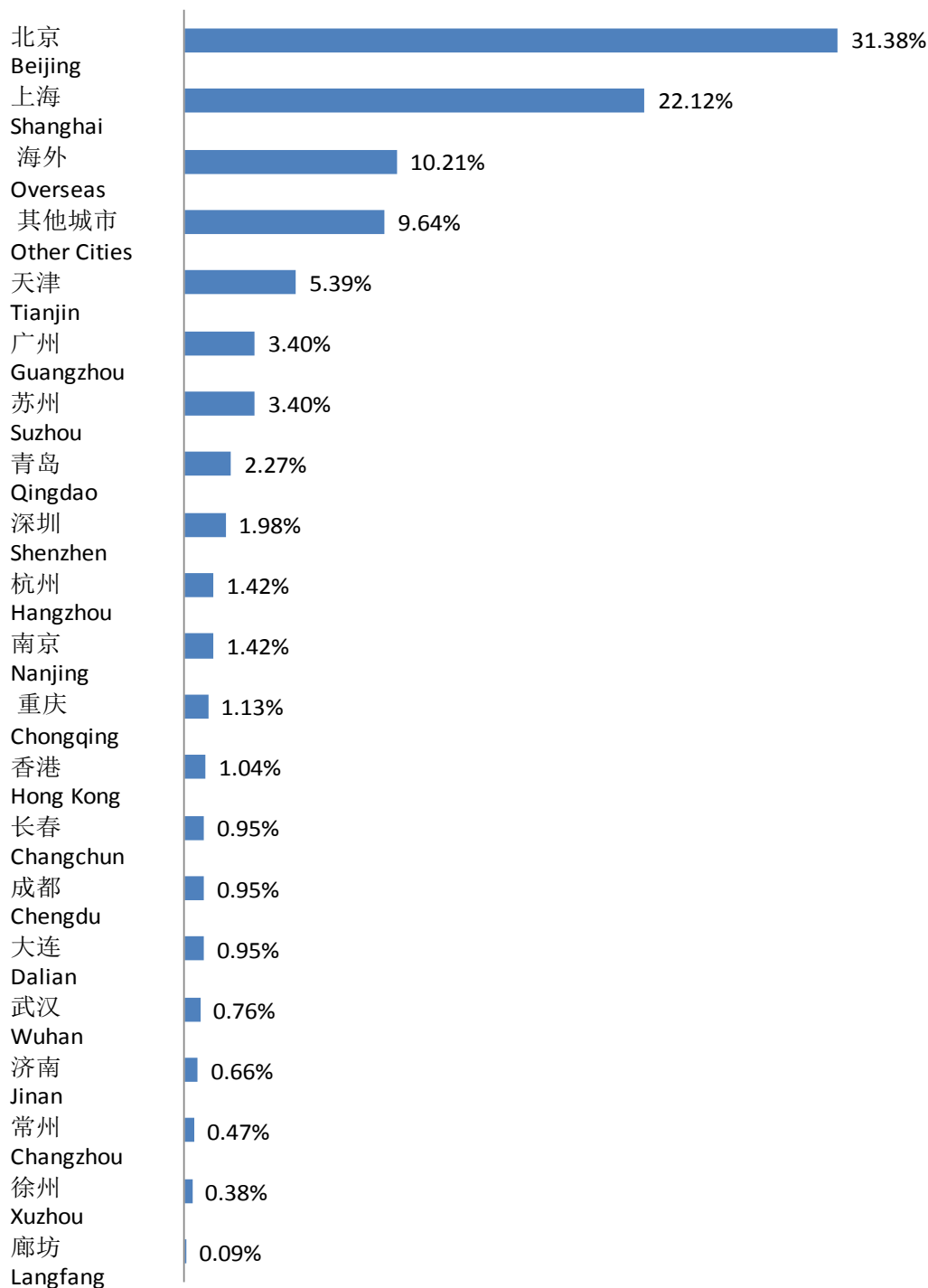
• 年龄 Age

图三 调查样本来源年龄分类 Figure 3 - Survey samples categories by age



• 区域 Region

图四 调查样本来源区域分类 Figure 4 - Survey samples categories by Region



Have you changed your employer in the last 12 months?

过去的 12 个月内你换过工作吗？

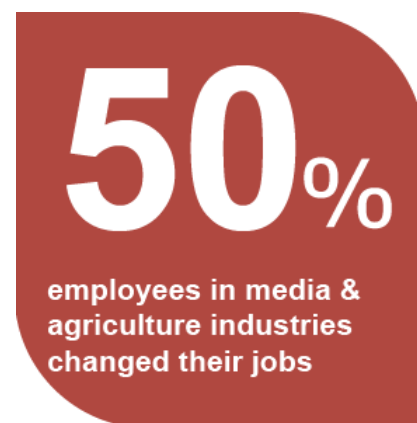
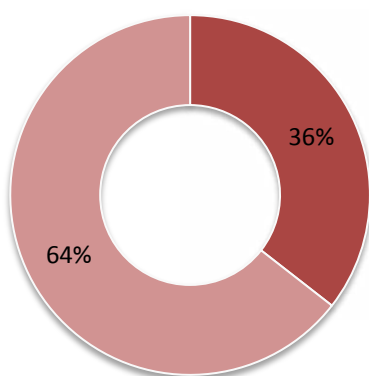
概况 Overview

换工作的总体比例与上一季报告相差甚少,因为经济形势延续了年初的缓慢发展。但是 36%的跳槽率能够说明跳槽的活跃度还是比较高,原因是国际市场和国内市场的竞争持续激烈。

The total job-hopping proportions were almost the same as the last report which deals with a China This Talent Flow Survey Report deals with a period of slow economic growth. However, 36% of employer changes could be explained by a relatively high, dynamic job-hopping level which related to continuous intense competition in both international and domestic markets, and, of course the recovering international markets.

图五 2012-2013 年换工作比例 Figure 5 - Percentage of changing jobs in 2012-2013

■ 是 Yes ■ 不是 No

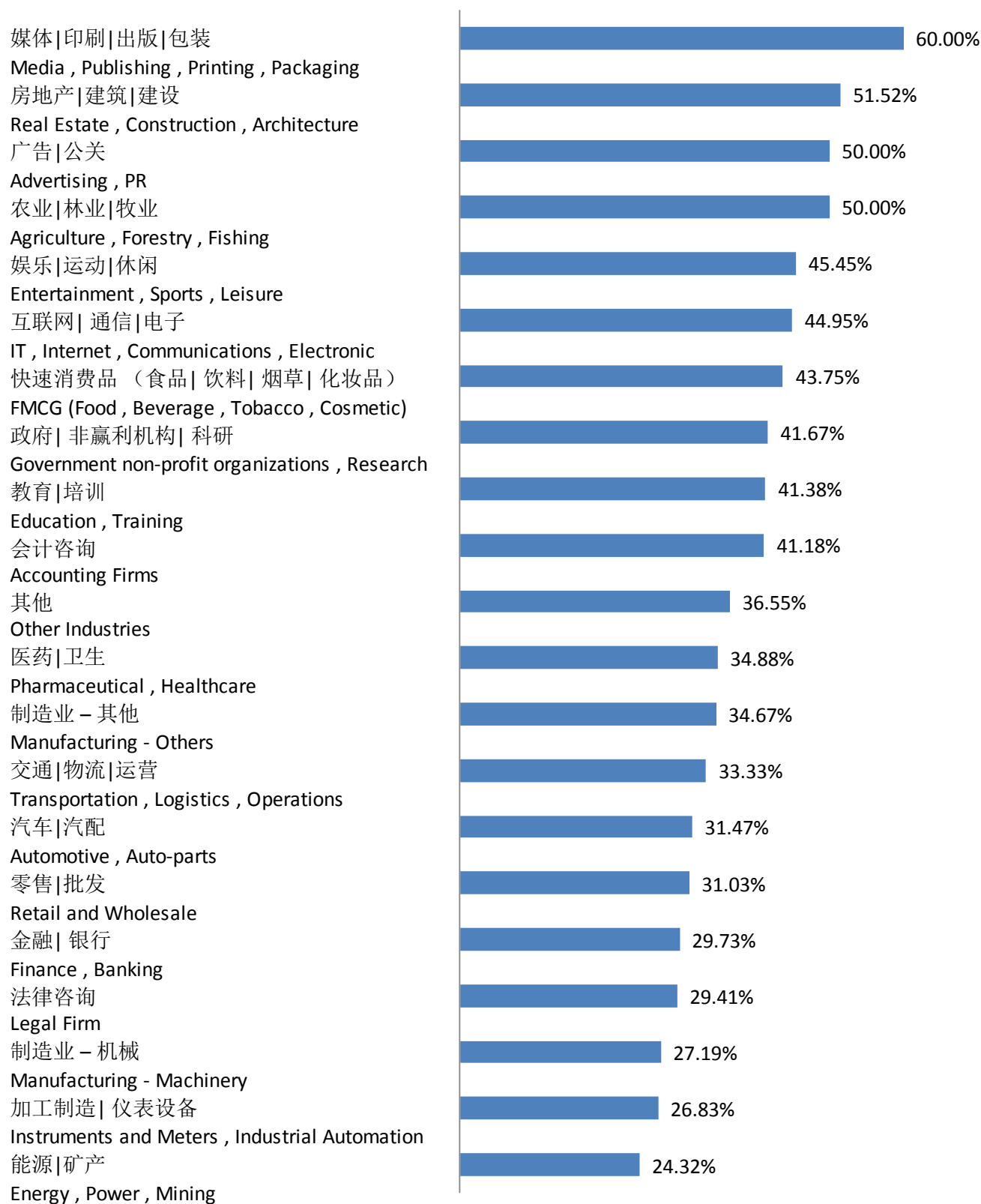


行业简述 Industry Scanning

媒体、印刷、出版业和农林渔牧业纵身一跃夺得本季调研头彩,与此同时,零售业,法律和能源矿产行业急速降到末尾。媒体、印刷、出版行业换工作人数与去年相比,增加了一倍。并且大多数人都选择完全不同的行业。根据罗迈国际顾问观察,媒体行业的人才转投新媒体例如互联网已大势所趋。另一方面,农林渔业主要由于资源日渐萎缩,技术的革新伴随着重污染。还有很多制约因素,大多都是人为的,主要是环境的破坏,制约了农林渔牧业的发展,人才被迫寻求新工作机会。在跳槽率高速下降的行业中,零售企业一线员工工资以 15% ~ 30% 的速度增长,有的企业涨薪成本甚至是其整年的利润。法律行业则是因为越来越多的公司需要内部法律顾问,给法律人才提供了稳定的工作机会。

The job-changing rate of employees in media, publishing, printing, and packaging industries jumped to a peak of 60% which was more than double the rate in the past year. Most changed to work in different sectors. The increasing number of job-changes in agriculture related to the scarcity of resources, and attempts to deal with pollution. There are various constraints including environment disruption which prevented the artificial developments. These resulted in pressure on people to leave their jobs. The trend where media employees switch to new media such as the internet is a trend which RMG Selection expected. At the moment, the rate of job-change in retail, legal and energy sectors dropped to a low level compared with other industries. In the retail industry salaries rose by between 15% and 30% and these increased costs could be seen throughout the year in some companies. On the other hand, more companies demanded in-house legal personnel, which provided stable working opportunities for legally professionals.

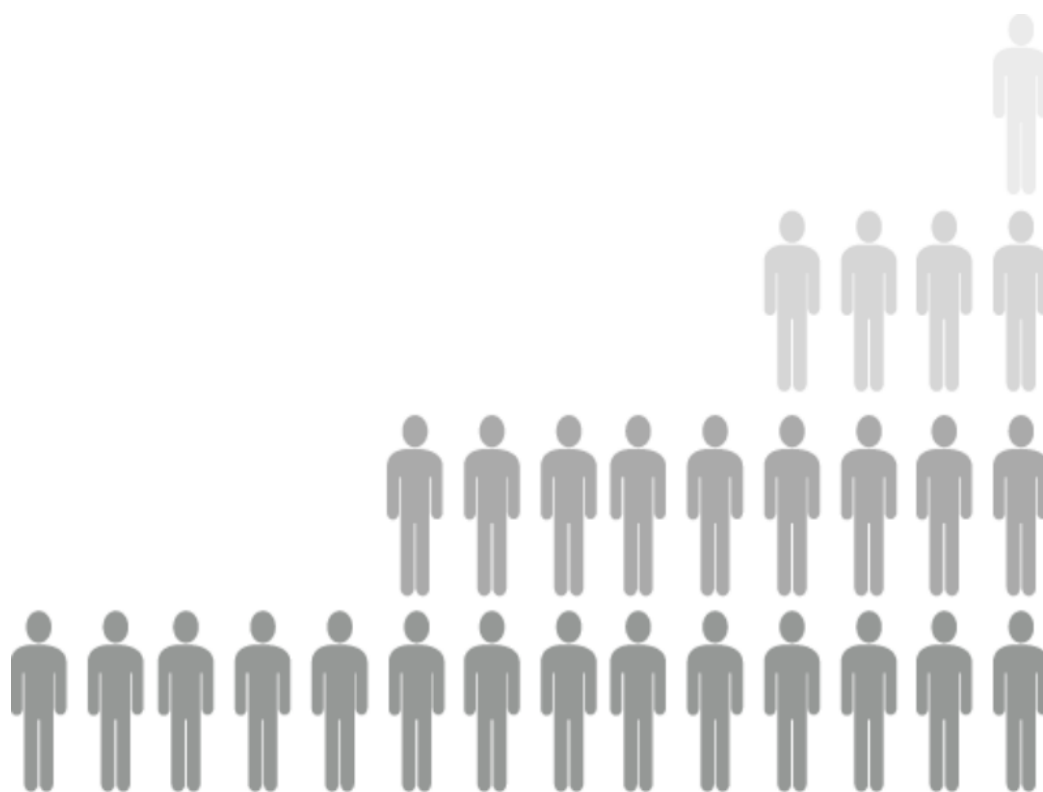
图六 2012-2013 年换工作比例按行业分类 Figure 6 - Percentage of changing jobs in 2012-2013 categories by industries



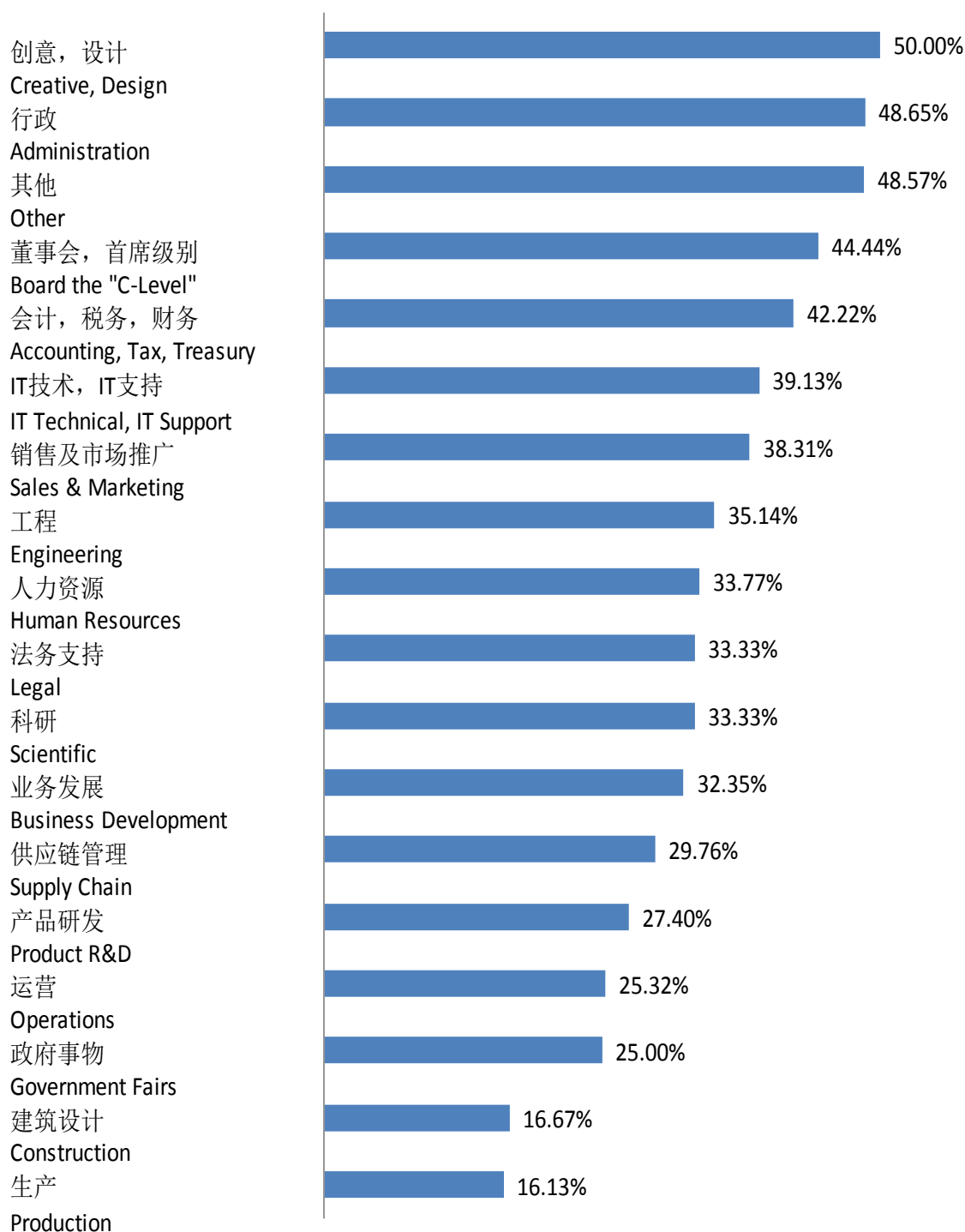
职能简述 Function Scanning

比例最高的创意设计部门，人才跳槽越多，价值越高，因为人才在每个不同的公司工作，积累经验，吸收消化所学到的技术，可以为新公司创造更大的利润，所以越来越多的创意设计部门人员选择跳槽，谋求更好的发展和更高的薪金。其次，随着我国经济的加速发展，建筑业作为国家的经济支柱产业的地位也日益突出，而对于一切建筑工程施工来说，安全、质检工作一直并始终贯穿于整个项目前后，所以说建筑质检、安全工程师未来发展前景无限。在其他部门比例中，较为突出的行政行业比上一季报告升高了 20%，说明虽然行政室一份较为稳定的职业，但是文员、人事及后勤等职业岗位供求状况较差，求职者压力较大。

Creative and design departments saw the highest proportion of job-changes. These people will be more sought-after because they learn and accumulate knowledge, skills and experience in different companies and therefore bring what they learn from a former employer to the next. That is why creative and design staff change jobs frequently in search of career-development and higher wages. Secondly, as the Chinese economy develops, construction is becoming ever more important in the national economy. Further, safety and quality inspection tasks are required in all projects, which means that career development prospects are excellent for quality inspection and safety engineers. Compared to the last report, administration job-hopping rates surged with 20% more than last year. Even though work in administration could be considered as stable employment, the supply and demand for office clerks, human resources, and other positions is not buoyant. This places pressure on those seeking jobs in these areas.



图七 2012-2013 年换工作比例按职能分类 **Figure 7 - Percentage of changing jobs in 2012-2013 categories by function**



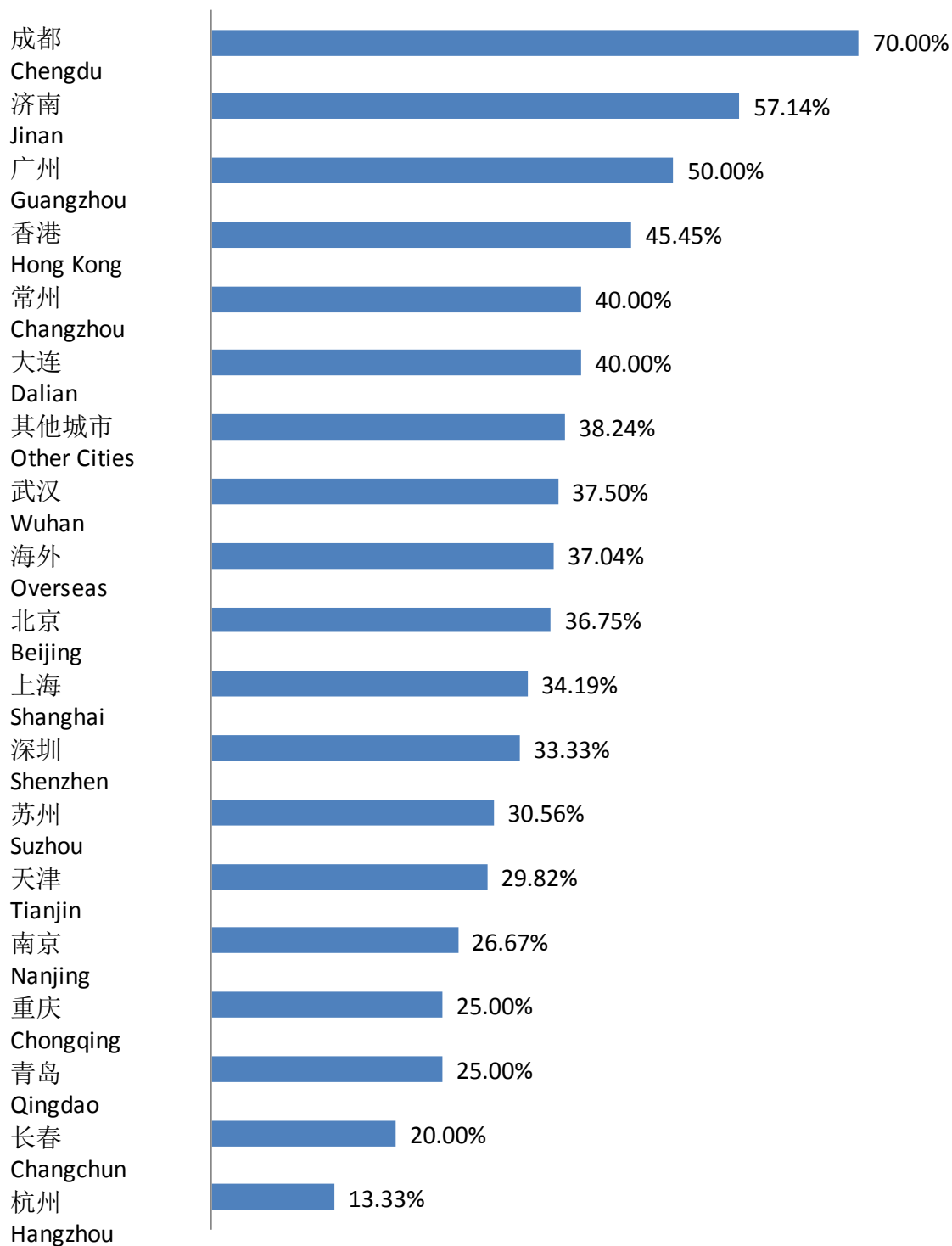
地域简述 Location Scanning

成都换工作的人数居高不下，更比去年升高了近 30%，不可忽视的是今年在成都举行的 2013 年财富全球论坛，该商业盛会推动了成都甚至中西部地区的经济开发，也为更多的人员带来了新的工作机会。今年新增的海外地区所占比例也不逊于国内很多城市，并且超过北京，上海，深圳等城市。中国经济的高速发展和结构转型，为海外人才提供了大量创业的机遇。面对大量的人才需求，从中央政府到地方政府制定了一系列引才政策吸引海外人才回国。值得关注的是每年回国的人才数以 38% 的速度增长，今年更增加了 5 万多人，这现象使得中国成为全球最主要的“人才回流”和“人才环流”的接纳国。

The number of people in Chengdu who changed jobs is higher than in any other cities, increasing by 30% over that recorded in last year's report. A reason may be that Chengdu held FORTUNE Global Forum 2013, and this meeting encouraged economic development in Chengdu and the mid-west region and brought more jobs to these cities. More people came from overseas to this region than to cities such as Beijing, Shanghai and Shenzhen. The rapid development and structural transformation of the Chinese economy offered many job opportunities to talented staff from overseas. In the face of this strong demand from overseas, both central and local government made it a policy to attract overseas talent back to China. It is noteworthy that the numbers returning is growing by up to 38% each year, and more than 50,000 have returned this year. China has become the world's leading country in "Brain Gain" and "Brain circulation".



图八 2012-2013 年换工作比例按地域分类 **Figure 8 - Percentage of changing jobs in 2012 -2013 categories by region**

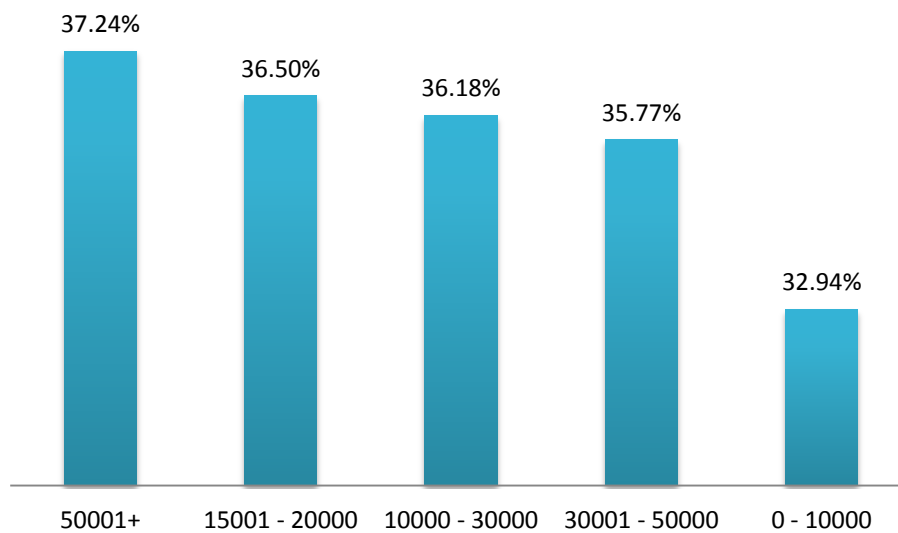


薪酬比较 Salary Comparison

与上一季报告相比，50001 以上薪水的人才跳槽比例最高，10000 以下薪酬的人员的跳槽率反而最低，其他各类人群并没有太大变化。这一发现，体现在很多企业的薪酬设计里，薪酬的设计没有机遇能力和绩效，那么员工的薪酬则变得极具刚性，不能很好的体现出薪酬的激励作用，从而员工的绩效和能力之间的差异就不能通过薪酬来体现，薪酬的内部公平性表现不出来，很多能力高的人才就会寻求新的工作机会。

In contrast to the previous report, the highest percentage of job-hopping is among those who earn a salary of more than 50,000RMB/month, while the group earning less than 10,000RMB/month has the lowest rate of job-change. This indicates that the reward-structure has failed to reflect opportunity, capability, and performance in many firms. Moreover, the salary structure has become inflexible, and so the incentive function of payment does not perform well. This also means that it is difficult to differentiate between the performance and capabilities of employees and leads to internal payment equality in a business environment where so many talented people are looking for new job opportunities.

图九 2012-2013 年换工作比例按薪酬分类 Figure 9 - Percentage of changing jobs in 2012-2013 categories by salary

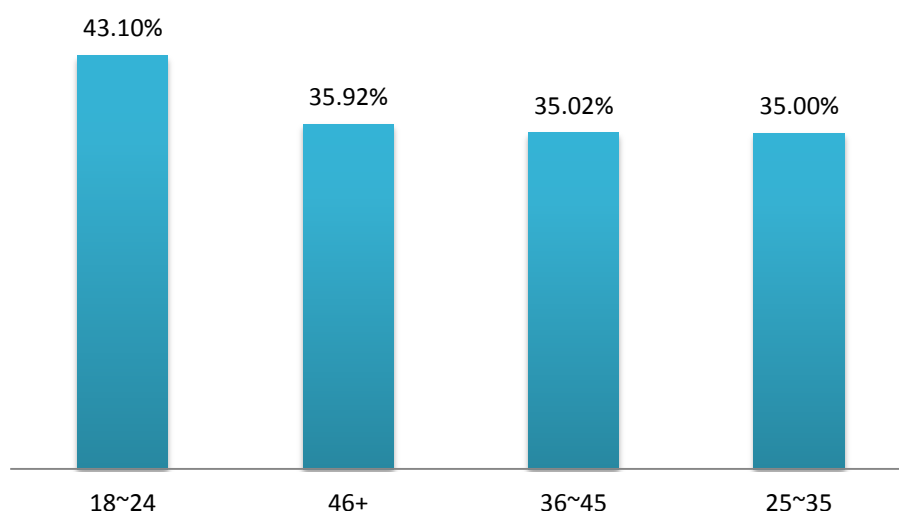


年龄比较 Age Comparison

18~24 岁的青年人换工作比例最高，比其他年龄段的人群比率高出十个百分点。这暗示了所谓的 90 后跳槽频繁，罗迈国际资深猎头专家指出，90 后非常自信，但是缺乏经验的同时对职业充满了太多理想化的期待，又对涨薪预期非常高，一旦发现理想和现实有所不同，便会寻求新的工作。

The age group of from 18 to 24 (so-called 1990s) has the highest percentage of job-hopping: 10% higher than other age group. According to an RMG Selection expert, people born after 1990 are very confident but lack experience and have too idealised an expectation of career prospects and wage rises. Once they discover the difference between ideal and reality, they will often immediately seek new jobs.

图十 201-20132 年换工作比例按年龄分类 **Figure 10 - Percentage of changing jobs in 2012-2013 categories by age**

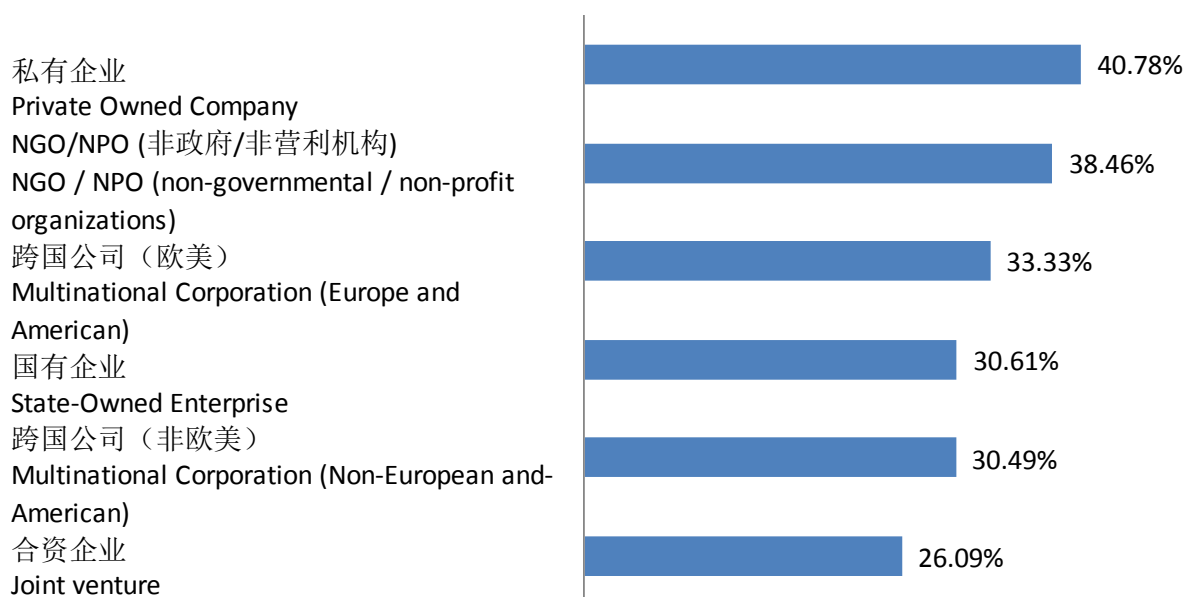


公司类型比较 Company Type Comparison

由于全球市场的萎缩、中国劳动力和材料成本的上升，本土竞争的日趋激烈，都在削弱外资公司大幅提高员工福利待遇的能力。国有企业的人才流动相比去年上升了 5%，国企跳槽人员可分为压力过大和毫无压力两类，都属于跳槽人群。

Owing to the contraction in the global market, Chinese labour force and material costs have increased in some sectors, and these factors have led to strong domestic competition. A result has been a drop in pay-levels among multinational corporations. The talent flow in state-owned enterprise has risen by 5% compared with last year. Two reasons are too much pressure and little pressure to change the current job.

图十一 2012-2013 年换工作比例按公司类型分类 **Figure 11 - Percentage of changing jobs in 2012-2013 categories by company type**



Does the current economic situation affect your desire to change to
another job?

目前的经济形势影响你换工作的决定了吗？

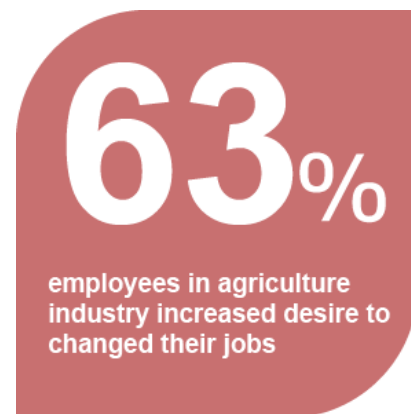
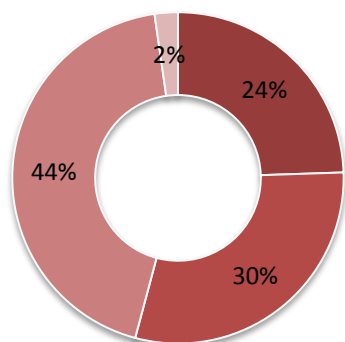
概况 Overview

本季换工作意愿比例延续了上一季的排序，其中变化最明显的是降低换工作打算的人数，从上一份报告显示的7%升至24%。而增加换工作打算的人数由43%降至30%。原因之一是年中跳槽的人数确实比年末少。目前的经济形势并不是特别好，职场人士今年发展前景的期望不大。

Since the last report there has been a decrease in the desire to change jobs. The percentage of those content to stay in their jobs has risen from 7% last year to 24% this year. In addition, the rate of those who want to change jobs has dropped from 43% to 30% over the same period. One reason for this is a drop in job-hopping in the middle of the year. Furthermore, the current economic climate is less optimistic so employees do not have the same expectations in their career prospects.

图十二 2013年换工作意愿增长比例 Figure 12 - Increase desire in changing jobs 2013

- 没有影响 No change in desire
- 增加了换工作的打算 Increased desire to change
- 降低了换工作的打算 Decrease desire to change
- 其他 Other

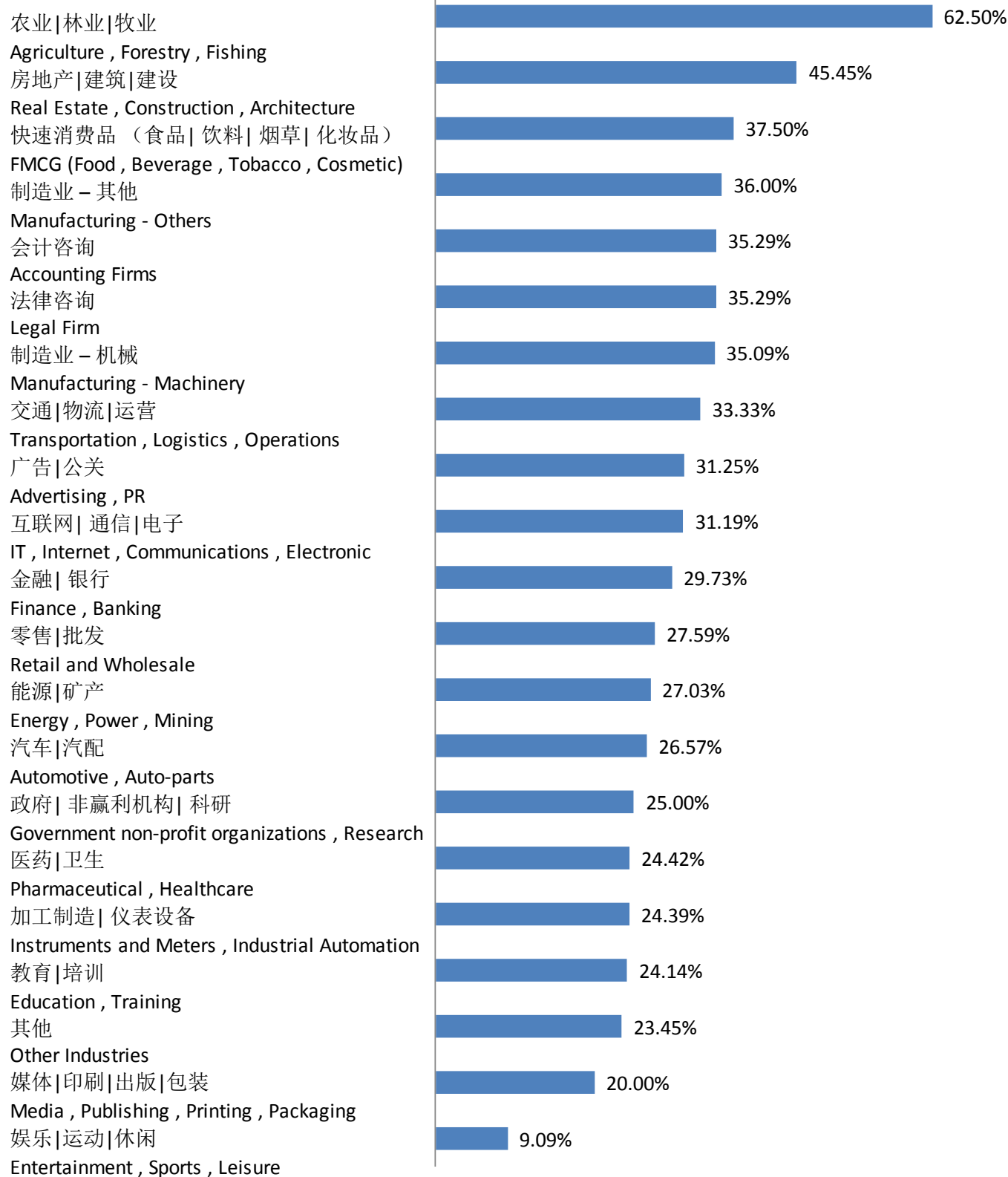


行业简述 Industry Scanning

农林渔牧业比排名第二的房产建筑业高出近20%，这再次证明今年农林渔牧业发展受到很大的冲击，导致60%以上的人员迫切想换工作。今年可谓是农林渔牧业发展最困难的一年，行业经营效益不佳，很多产业都面临产能过剩的情况，雪上加霜的禽流感导致农业遭遇空前危机。

The decline in employment prospects in agriculture, forestry and fishing is nearly 20% greater than in the real estate and construction industries with the second highest percentage of those wanting to change jobs. More than 60% of those in agriculture would urgently like to change job. We consider this year one of the most difficult years for agriculture, forestry and fishing. Many companies are facing a surplus of manpower because of inefficiency, while bird flu has contributed to difficulties in agriculture and farming.

图十三 2013 年换工作意愿增长比例按行业分类 Figure 13 - Increase desire in changing jobs 2013 categories by industry



职能简述 Function Scanning

超过半数的人员有换工作意愿的建筑
设计部门，恰恰与第一题中的排名成反
比，换过工作人数最少占（17%），想
换工作人数却最多（50%）。因为大部
分设计单位都存在“大不强、小不专”
的问题，并且创新能力不强。还存在市
场行业不规范，不正当方式竞争等因
素。但是，建筑设计部门还受房地产的
影响，预测今年下半年会有好转的趋
势。

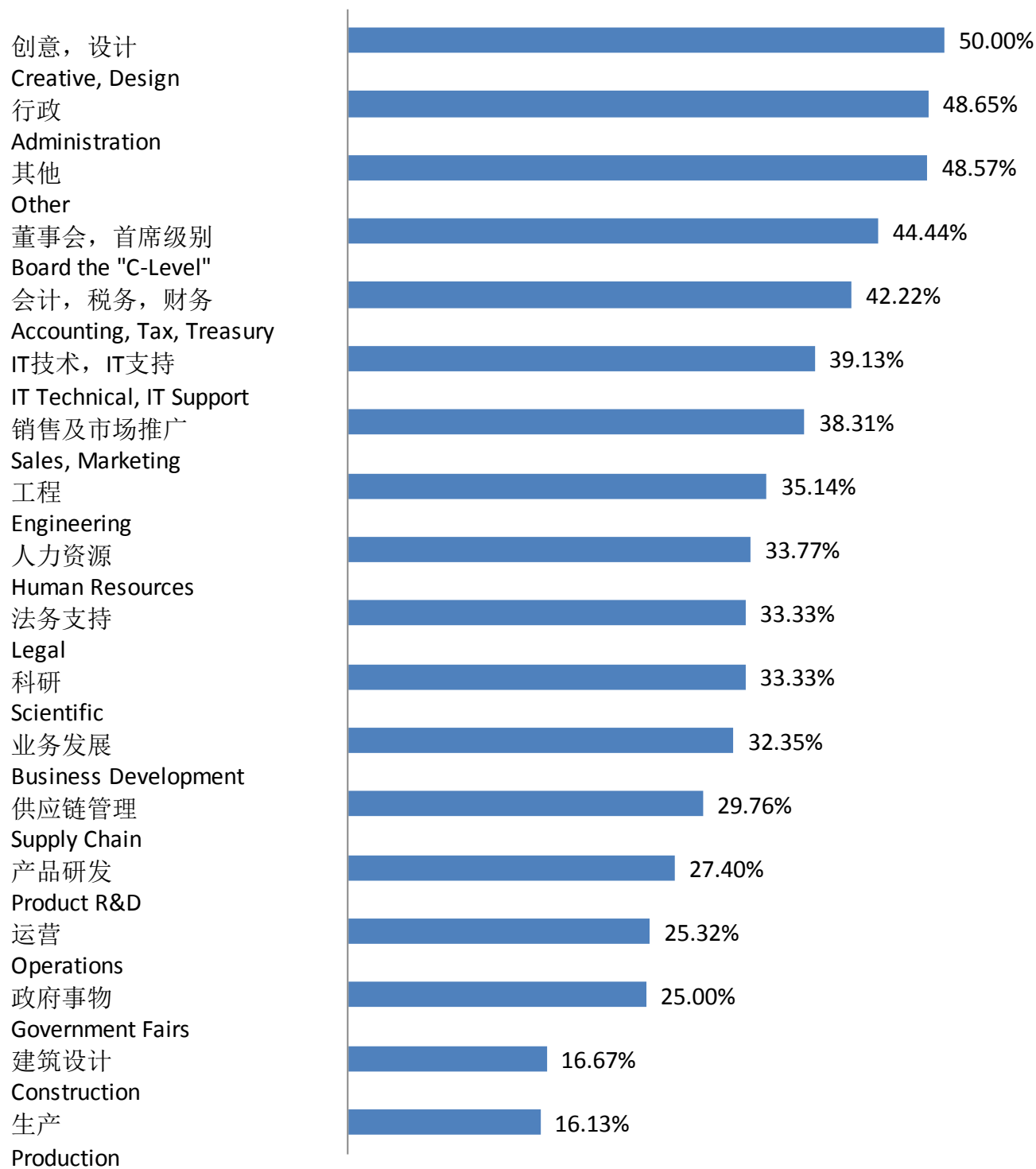
供应链管理职员换工作意愿下降不少。
根据罗迈国际资深物流顾问的了解，现
在公司与公司之间的竞争已经演变成
供应链之间的竞争，一个供应链管理
人员可以视为公司的成功或失败至关重
要的因素。

More than half of employees in the construction industry want to change to another job. The number of people who have changed jobs is at its lowest rate (17%), while those seeking new jobs are at its highest (50%). Many construction firms have problems – some are too big but not competitive while others are small but not professionally run. Sometimes their talented employees lack true creativity. Further, the industry is not standard, and the market exists in a climate of unfair competition. However, the construction sector is also affected by the development of the property industry, so that the situation will trend better in the second half year.

The number of supply chain management staff who want to change jobs has decreased. According to an observation by RMG Selection’s senior logistics expert, the competition has changed from that between companies or regions and is now between businesses operating the supply chain. As China is the world’s chief manufacturing base, numerous enterprises have realized that Supply Chain Management is the key to fostering excellent firms.



图十四 2013 年换工作意愿增长比例按职能分类 Figure 14 - Increase desire in changing jobs 2013 categories by function



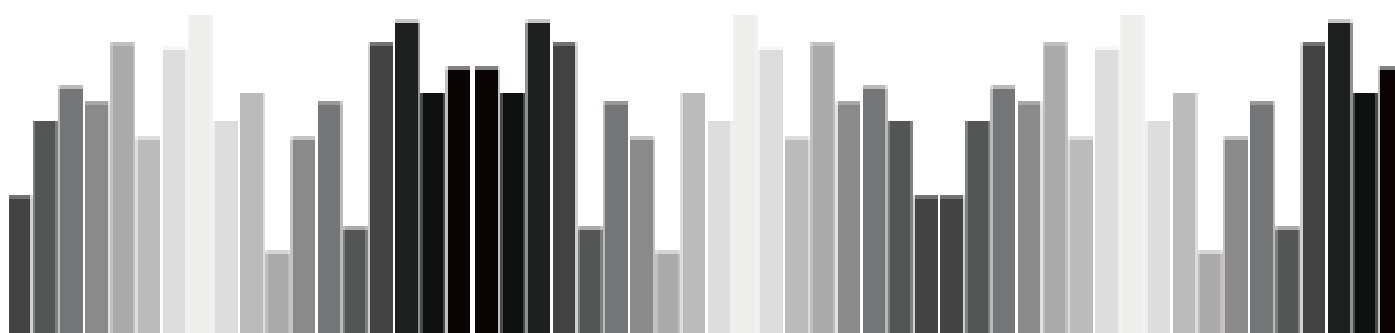
地域简述 Location Scanning

海外地区的职场人士不仅换过工作的人数不少，想换工作意愿的数量也大大高于国内 1 线城市。由此，可以说明海外人士跳槽比例比国内高，并且大多数都希望回国发展。从侧面，可以表明国内的比国外的的发展空间大，所以各大公司应该开始关注这一庞大的人群。

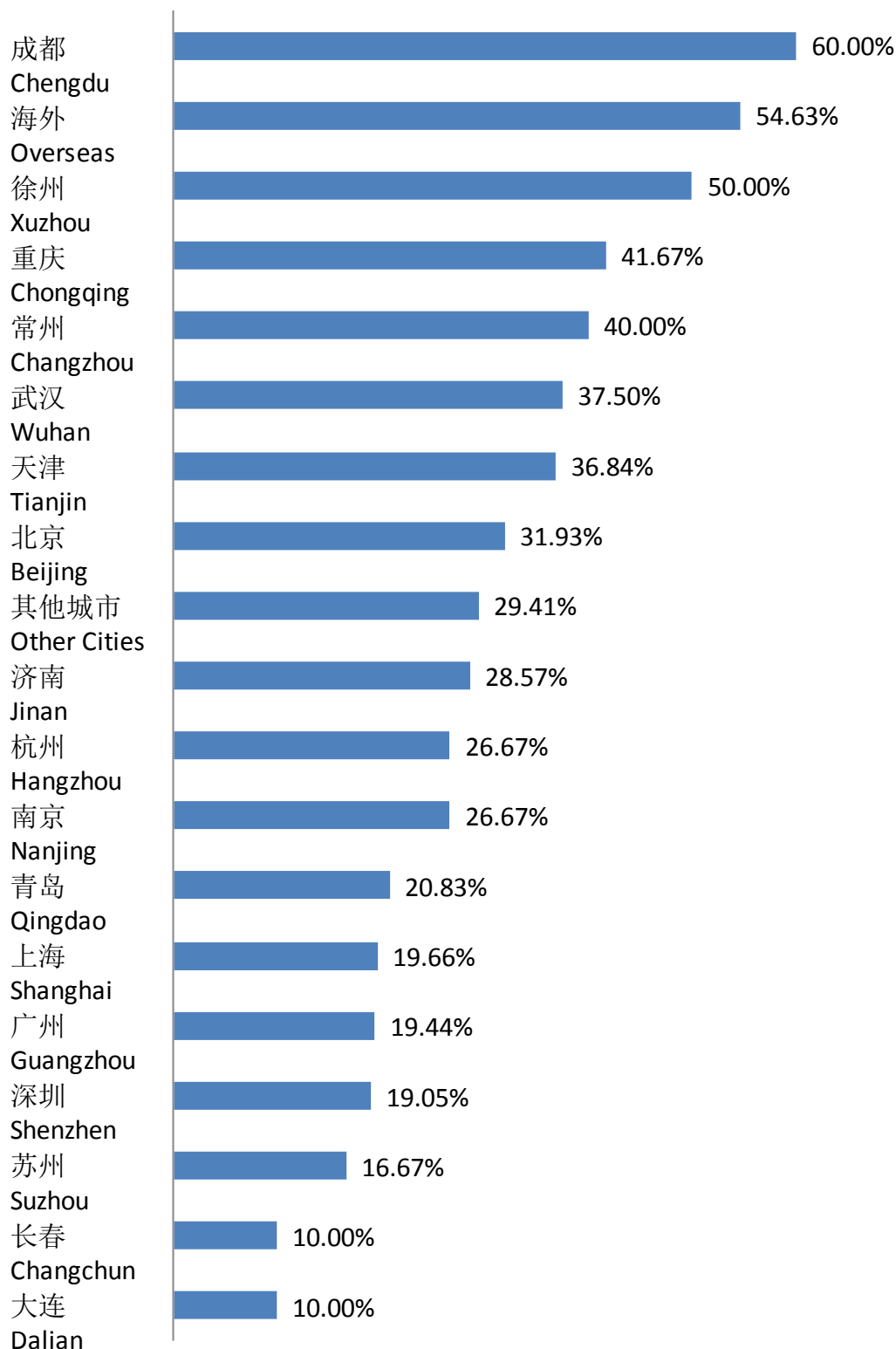
相比上一季报告，苏州，大连，长春等 2 线城市从前几名退居最后三名。这说明当前的各大城市的发展仍不稳定，每个城市都有工作发展的机遇。

Not only have a large number of overseas professionals changed job, the number wanting to change is much higher than among people working in first-tier cities in China. As a result, we can conclude that the overseas job-hopping proportion is higher than domestic. Most of these want to return to China. This shows that the domestic economy is developing more broadly than in foreign countries.

Compared with the previous report, Suzhou, Dalian, and Changchun have dropped from the top to the bottom of the table. The figure shows that the current development of job opportunities in cities is still volatile, with many job opportunities in each city.



图十五 2013 年换工作意愿增长比例按地域分类 Figure 15 - Increase desire in changing jobs 2013 categories by region

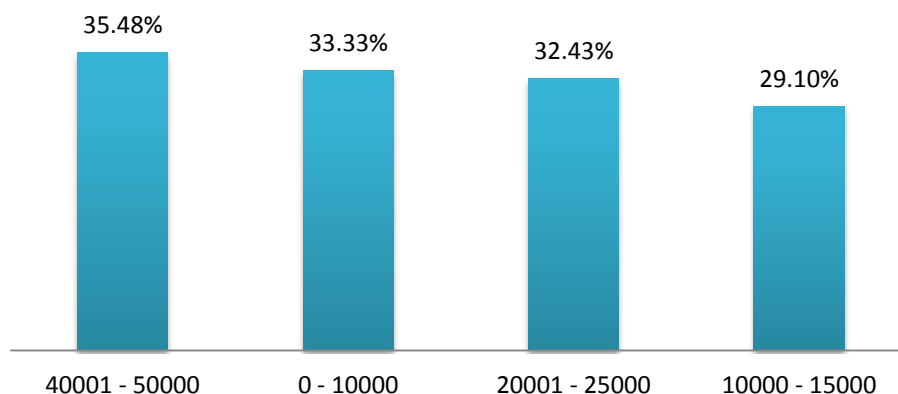


薪酬比较 Salary Comparison

10000 以下薪酬想换工作的人士开始蠢蠢欲动，这一人群基本都是刚踏进职场前 5 年的新人。但是频繁跳槽并不一定会带来高报酬。

Employees whose wages were below 10,000RMB/month began to seek new jobs. This group has generally been in the workplace for only five years. However, this group should be warned that frequent job-hopping is unlikely to result in high pay.

图十六 2013 年换工作意愿增长比例按薪酬分类 **Figure 16 - Increase desire in changing jobs 2013 categories by salary**

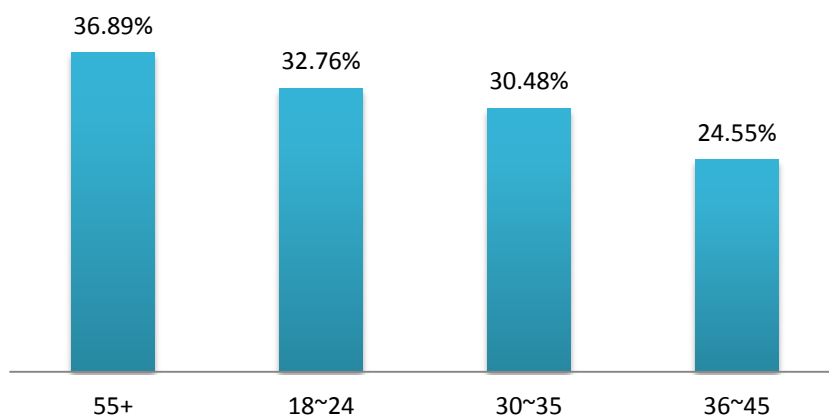


年龄比较 Age Comparison

即便在刚过去的一年，换过工作最多的两个年龄段，想换工作的意愿不但没有削弱，反而继续增加。年轻冲动的 18~24 岁的人群想换工作意愿大不难理解，然而 46 岁以上增加换工作意愿的人数比 18~24 还要多，这延续了上一季的问题，职场竞争和担忧，大都为以后的发展做两手准备。面对最新退休年龄规定（到 2045 年无论男女，退休年龄均为 65 岁），延迟退休的出台让很多即将退休的人士感到困惑，他们认为一方面自己身体可能吃不消，另外，应该让年轻人有更多工作岗位。

The 18-24 and above 46 age-groups are still looking for new job opportunities and these age-groups showed the highest rate of job-hopping last year. It is not difficult to see that young and impulsive people in the 18-24 age-group want to change jobs, but the numbers of people in the 46+ age-group who want to change jobs is greater than in the 18-24 group. The new retirement age regulations - 65 up to 2045 - confuse many people of retirement age. Some argue that there should be more job-opportunities for the 46+ age-group. But there is a good deal of competition and concerns about health in the later age-group while many employers would like to prepare more opportunities for the career development of the talented young.

图十七 2013 年换工作意愿增长比例按年龄分类 **Figure 17 - Increase desire in changing jobs 2013 categories by age**



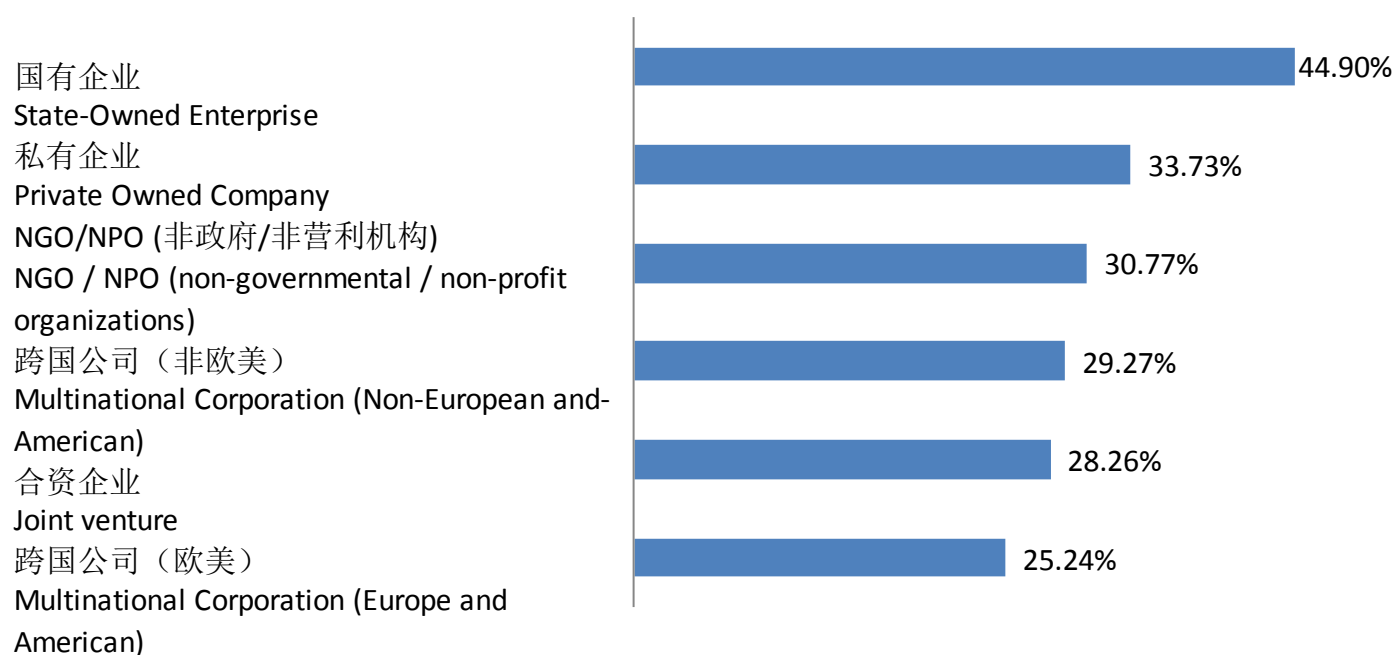
公司类型比较 Company Type Comparison

国有公司人才的跳槽意愿增长出乎意料地飙升至首位，高达 45% 的人增加了换工作的意愿。其中影响这个想法包括国有企业的制度约束，领导方式过于专制，和职业成长度不高等因素。因此，雇主们应该制定有效保持企业员工的策略，例如建立公平有效的激励机制，营造独特的企业文化等等。

The number in state-owned companies who want to change jobs has unexpectedly surged to a peak: as much as 45% of people want to change their jobs. They give as their reasons institutional constraints, autocratic leadership, and restricted opportunities for career development. Employers need strategies to keep staff such as fair and effective incentive schemes and a unique corporate culture.

图十八 2013 年换工作意愿增长比例按公司类型分类

Figure 18 - Increase desire in changing jobs 2013 categories by company type



W

hat are the three main factors affecting your wish to change job?

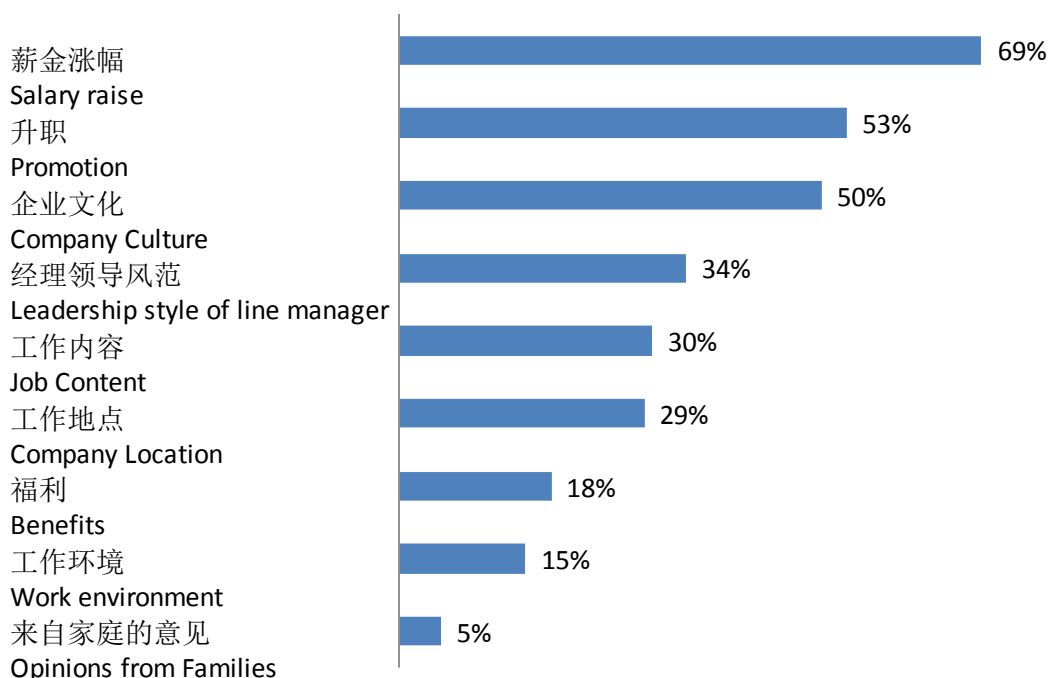
影响跳槽的三个主要因素是什么？

概况 Overview

如图所示，在本次调查中，被调查者普遍认为会影响到跳槽的三个因素是工资、升值和企业文化。其中，认为工资影响跳槽的比例达到了 69%，远远超过别的因素。这跟职业本身的定义有着很大程度上的联系。对职业最基础的定义认为职业是人们在社会中所从事的作为谋生手段的工作。最为谋生手段，工资报酬便是影响工作最重要的因素。

The bar chart shows three main considerations which encourage the desire to switch jobs: salary, promotion, and company culture. Of these, 69% put salary ahead of other factors because standing and position in society are regarded as dependent on salary.

图十九 影响跳槽的三个主要因素是什么？ Figure 19 – What are the three main factors affect to change your job?



由图中可以看到，排在第二位的是升职。在《吕氏春秋》中就有关于升职讨论记载，“在一个等级制度中，每个雇员都倾向于上升更高的职称地位。”这是人们对于自我价值实现的需求。而企业文化进入到影响跳槽的因素的前三名，则意味着企业软实力的影响力由外至内渗透着企业运营的方方面面，从影响消费者的选择延伸到影响求职者的倾向。就现实而言，打造独特的企业文化在很大程度上是对企业有利的。作为企业文化的重要组成部分，雇主品牌的建立不仅可以提升企业自身的价值，还可以为企业吸引人才。

The overall picture shows that promotion is the second reason why people change jobs. Lu Shi Chun Qiu suggests that all employees want a higher position in a hierarchy to reassure themselves about their value. Company culture is almost as important as promotion. This shows that the creation of a unique corporate culture is advantageous for the enterprise. This positive branding of the company makes it attractive to potential recruits.

从图中我们可以看到，排在最末位的是来自家庭的意见。但关于这一因素，我们不能断然说它对跳槽的影响力很低，这要依据不同情况来作评价，有些时候，家人的意见能起到一票否决的作用。比如说，根据罗迈国际顾问的调查，当跳槽面临着 relocation 的时候，家人的意见在很大程度上是求职者做出最终决定的依据。

性别比较 Gender Comparison

从图上的信息来看，影响跳槽的因素对于男性和女性并没有太大的区别。不过有几个特殊的信息值得我们注意。

首先，对于直接领导者的领导风格，认为比较重要的女性比男性多了 8%。女性细腻的情感和对沟通的需求使得在工作中，领导风格的影响占据了明显的比例。福利和工作环境是两个图中仅有的排名有变化的因素。这个变化的产生有可能源于以下几个因素。基于性别压力，男性承担着更重的养家糊口的责任，这使得他们在选择工作的时候会更多得考虑工资福利等相关因素。

同时，随着男女平等的思想在社会分工中愈发有所体现，女性在许多工作环境艰苦的岗位上的比例大有提升，甚至反应在我们的图标中，女性对于工作环境的要求更低于男性。女性将其在家庭角色中吃苦耐劳的特点也带入了职场角色中。

女性工作的普遍性和女性独立意识的增强同时也反应在最后一项来自家庭的意见上。对于女性职业发展的社会观念和社会态度的变化大大降低了女性为了家庭牺牲职业的比例。

Sometimes it is the opinion of the family which decides on a change of job. We have found this when interviewing for Selection Consultants at RMG when it is the family which makes the final decision about whether to accept a position.

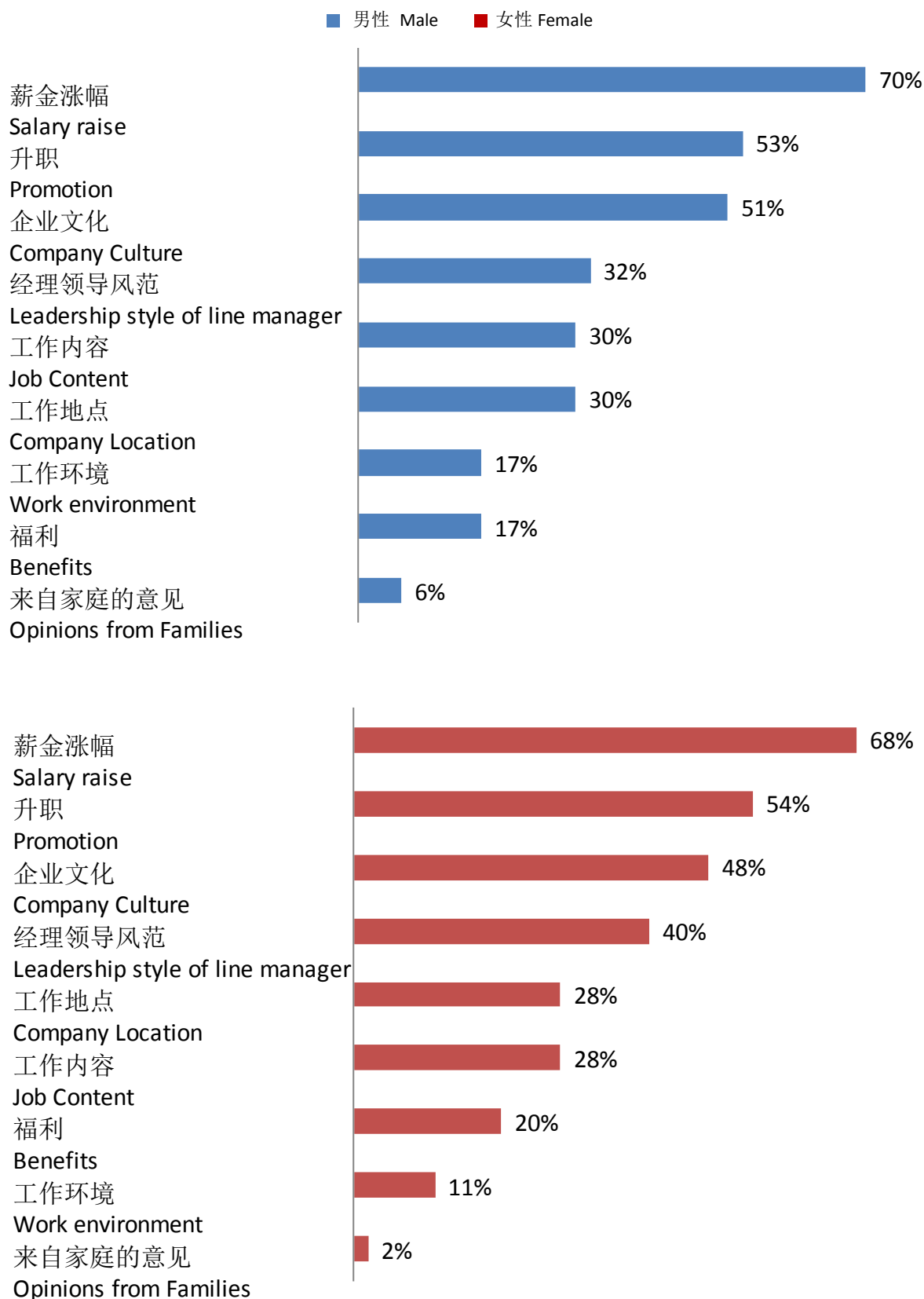
The information from the bar chart below shows that there are small differences between male and female. But some factors are worth attention.

First of all, in respect of the leadership style of the line manager, 8% more females than males think this is important because they are more likely to be affected by insensitivity. As far as benefits and working conditions are concerned, men are more influenced by benefits because they have the major responsibility for providing for their families.

As a result of the equality of the sexes in the workplace, men and women often do the same jobs. Where they do, female workers put up with difficult conditions more readily than do men.

Gender equality has also meant that women have become less ready to sacrifice their careers in the interests of the family.

图二十 跳槽因素比例按性别分类 **Figure 20 - Percentage job-hopping factors categories by gender**



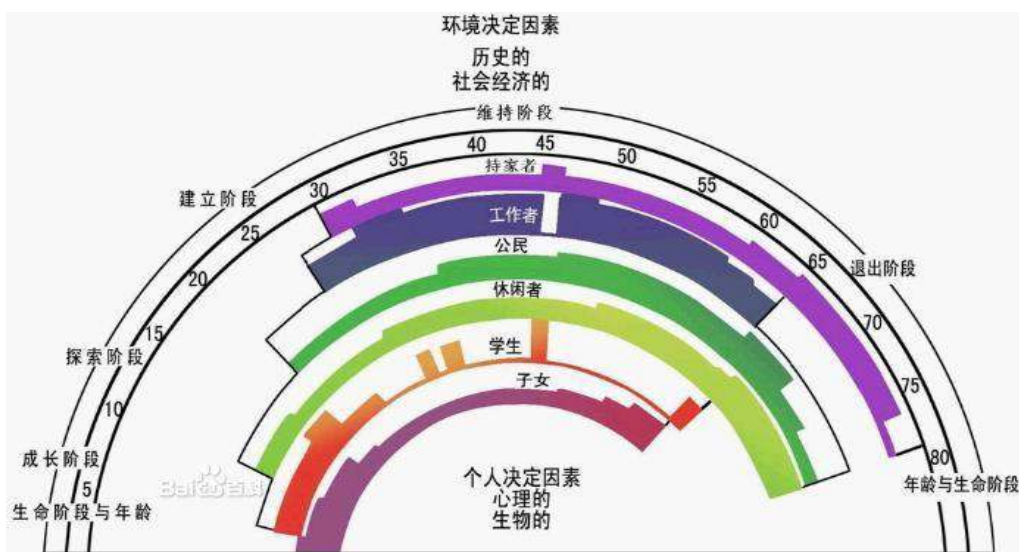
年龄比较 Age Comparison

根据我们按年龄分类之后的数据显示，影响不同年龄段的人群跳槽的因素相差还是比较大的。数据展示的偏好特征与一个人职业生涯和人生发展规律是息息相关的。结合弗洛伊德人格发展阶段理论、施恩的职业生涯发展理论等多个学说，我们可以对图表所反映的信息做出粗略的解释。

为了直观地感受不同年龄段之间的偏好差异，我们按因素分类，将不同年龄段对该因素的偏好百分比做成折线图，并给它添加了趋势图。

According to age classification data factors affecting job-hopping differ significantly in different age groups. Personal career development and life development are important.

The following attempts to describe the factors which affect the desire to make a career change.



• 福利 Benefits

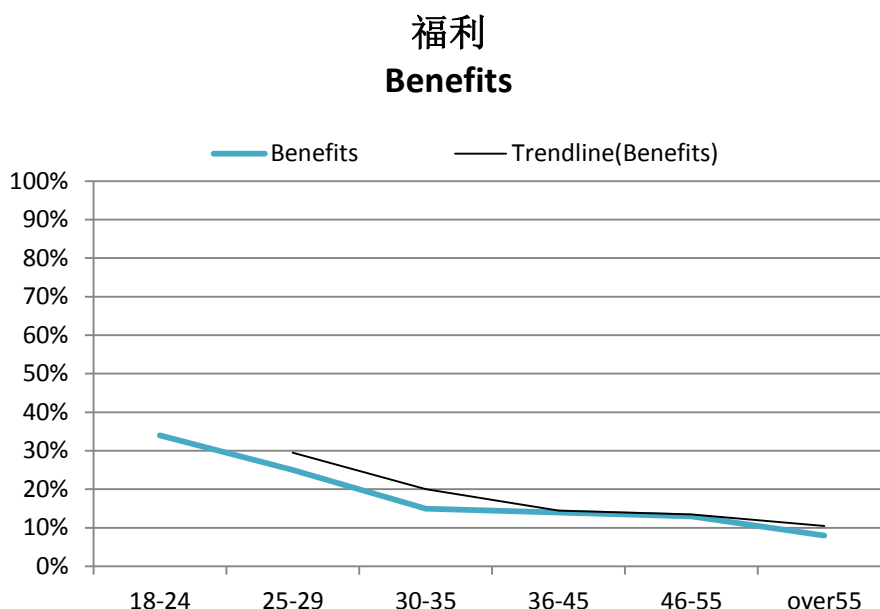
处在 18-24 岁这个阶段的人正面对的任务是接受教育和培训，开发工作世界中所需要的基本习惯和技能，这是人生的探索阶段。在这个阶段进入职场的人会面对一定的生活压力，但生活压力并没有大到左右职业选择的程度。这时期的主要任务是进入劳动力市场，谋取可能成为一种职业基础的第一项工作，并逐渐了解、熟悉所在的企业和行业，认同所在企业的企业文化，融入工作群体，尽快成为一名合格的工作者；同时需要熟悉适应所在岗位的日常程序，完成好工作。

而福利在职场中所扮演的角色是协助公司吸引员工，留住员工，提高企业在员工和其他企业心目中的形象并提高员工对职务的满意度。这对于可能是需找第一份工作的这个时期的职场人来说是比较重要的衡量因素。而在经历过几家公司，对于整个职场有了大致清晰地认知之后，福利的作用会越来越小。

People in the 18 to 24 year old age group are exploring their career plans. They talk about education, training and the skills required in the workplace. Though people in this age group feel the pressures of adult life, these pressures do not generally control their choice of career. Entry into the labour market is seen as the foundation of the later career. This will give them familiarity with company structure and the sphere they have entered. To get a firm foothold, they immerse themselves in the company ethos as well as familiarizing themselves with the tasks they are called on to perform.

The rewards offered help the company to attract and retain staff. They also say something about the firm's image and are an important component of job-satisfaction. Experience in different companies as the career progresses will help the employee to form a view of the kind of company in which to find a position.

图二十一 影响跳槽因素比例按福利分类 Figure 21 - Percentage of job-hopping factors categories by benefits



• **薪资和升值 Salary and Promotion**

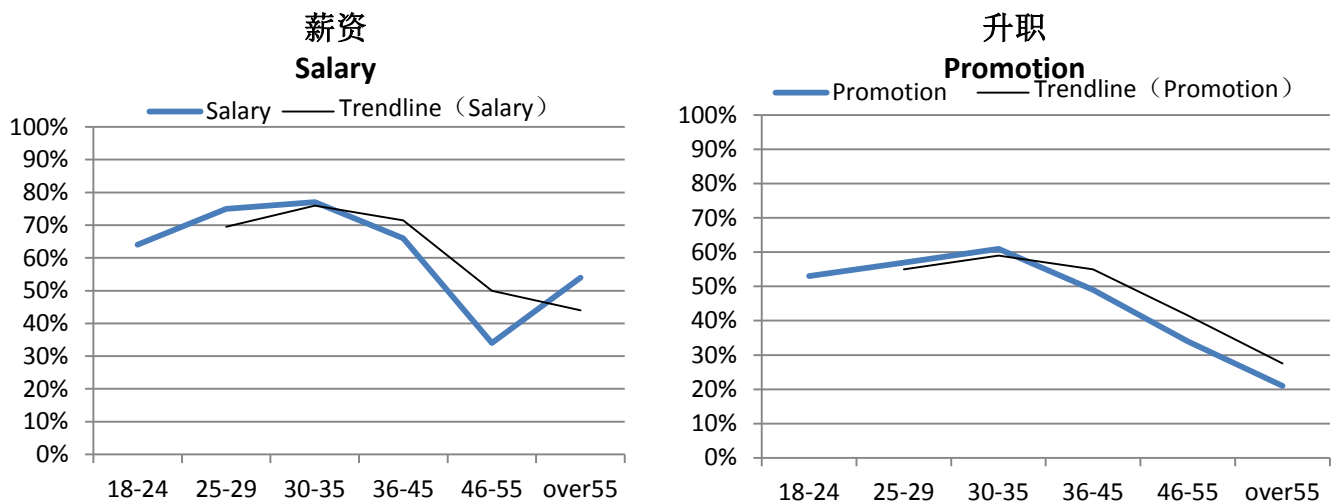
结束校园生活、经济独立、离家独立生活、结婚、为人父母是人们进入下一阶段，也就是成年阶段的标志。从生涯彩虹图中可以看到，处在这个阶段的人们从单纯的工作者向兼顾工作者和持家者发展，面临着比较大的生活压力，因此对于薪资和升值的需求会在这一阶段达到最高位置。

对于薪资和职位的需求大部分在 35-40 岁左右达到巅峰，因为在 40 岁之后，人的生理状况开始从高峰衰退，不论是体力和精力都在逐步下降。这个时候的职场人已经在某一领域达到了一定的高度，趋于平衡发展，但想要进一步突破的难度也更大。因此很多人开始进入职业上的自我安定时期。对于薪资和升值的追求也就开始日益下降。

The end of campus life, economic independence, independent living, marriage and parenthood are the early stages of adulthood. The rainbow diagram shows the transformation from just being workers to the integration of working and adult life. At this stage life pressures will help to encourage the desire for promotion and a bigger wage.

Most people reach their peak in terms of salary and position between 35 and 40 years old. After 40, the human physiological condition begins to decline. At this career stage of working people who have reached a high position tend to be satisfied with it and seek a balance in the demands of their work and the rest of life. It is often a time of stability in their careers and there is a decline in the search for promotion and higher salary.

图二十二 影响跳槽因素比例按薪资和升职分类 **Figure 22 - Percentage of job-hopping factors categories by salary and promotion**

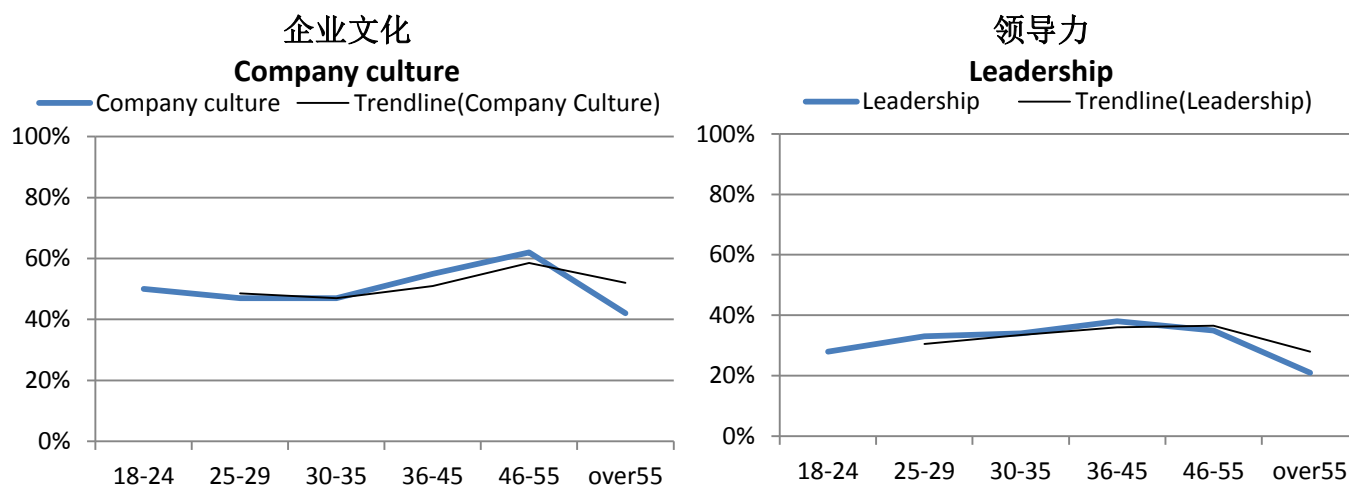


• 企业文化和领导力 Company culture and Leadership

根据对于职场的观察，大多数职业人过了 40 多岁就会走下坡路，能在职业上持续上升的只是少数。因此在 40 岁左右的职场人面临的比较大的任务与挑战是进行自我评估，就接受现状或者争取看得见的前途做出具体选择，并建立与他人的良师关系。而这一阶段人的心理发展面临着亲密对孤独的冲突。这个时候的职场人会倾向于建立有效工作的工作环境和与周边的人建立亲密的关系。因此，对于这一年龄段的职场人，舒适友好的工作环境和合拍的直线经理会更受欢迎

Observations in the workplace show that those over 40 are ready to take jobs of less importance, with only a few wanting promotion. In this age group employees need to assess themselves, accept their situation and build good relations with their colleagues. Good relations with their line-managers and colleague are sought above all else.

图二十三 影响跳槽因素比例按企业文化和领导力分类 Figure 23 - Percentage of job-hopping factors categories by company culture and leadership

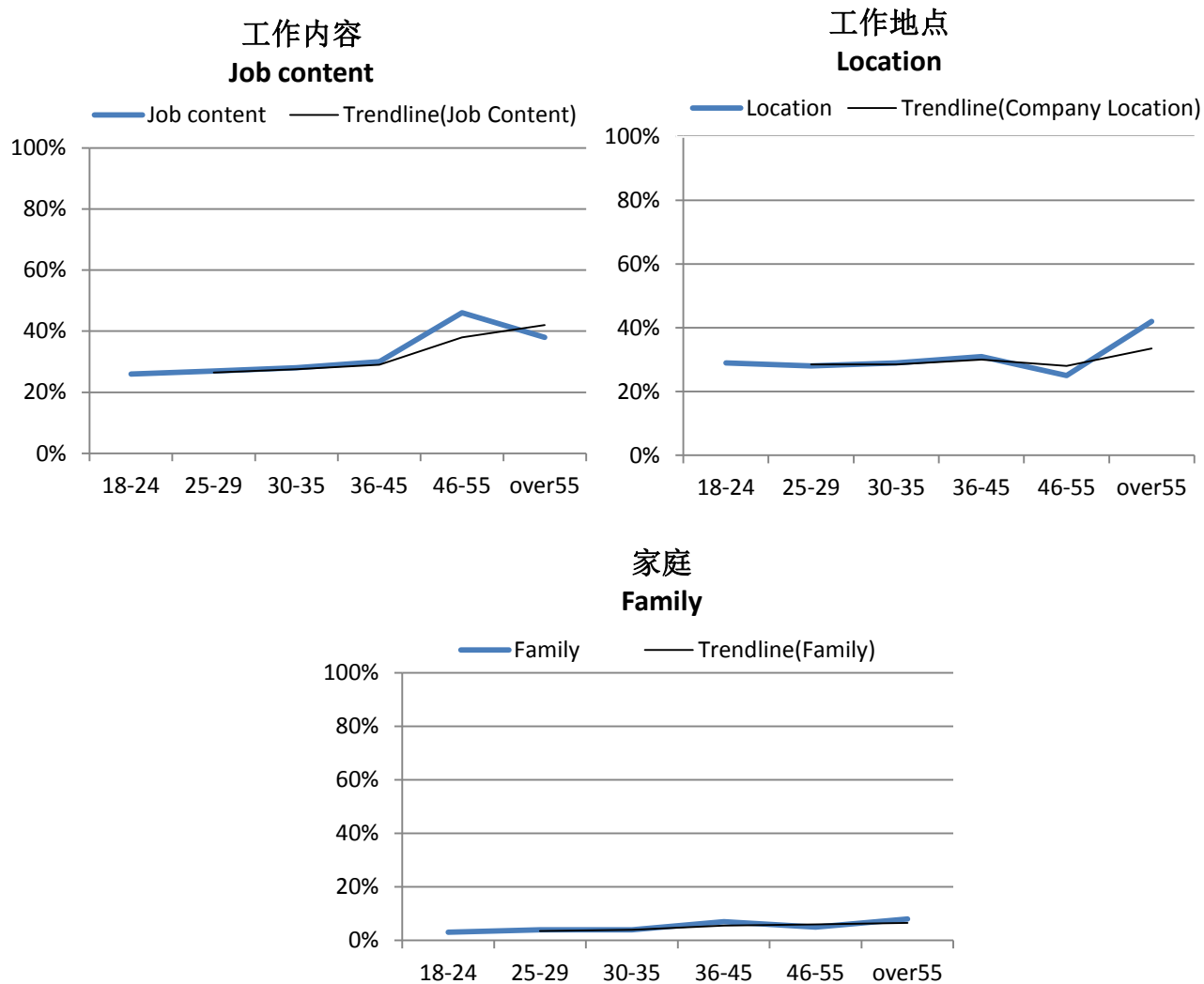


• 工作内容、地点和来自家庭的意见 Job content/location and Families opinion

工作内容、工作地点和来自家庭的意见这一组因素具有的共同点是都保持着震荡上升的趋势。也就是说，随着年龄的增长，这三个因素的重要程度日益增加

Job content, location, and family opinion are three factors which become more important with the increasing age of the employee.

图二十四 影响跳槽因素比例按工作内容、地点和家庭分类 Figure 24 - Percentage of job-hopping factors categories by job content, location and family



根据趋势线来看，工作内容的偏好的变化有区别于其他两个因素的明显特征。它在 40 岁以前的变化十分平稳，以极小的增幅稳步上升，而在 40 岁之后有一个明显的涨幅。根据职业发展理论，我们可以这样来理解这个变化。在职业发展到达巅峰之后，职场人都面临着来自自身的竞争力和进取心的下降和来自外界的权力、责任、地位的下降。相当部分处于这个阶段的“职场老人”在面临这种衰退甚至是退休时十分失落，觉得自己的职业生涯走向了终点。懂得调节的人会在这个时候调整工作的内容。

这个时候工作的重心可以从自身的职业发展向其他有价值的有意义的事情转变。比如，把工作经验传授给下一代，在“施比受更快乐的”人生最高境界中好好享受一下；或者，发掘工作以外的生活兴趣，享受更有乐趣的生活。

根据罗迈国际顾问的意见，在这个时期要保持一种认同感，选择最适合自己精神以及身体状况的工作内容，同时也要正确认识自我价值，运用自己积累的经验 and 智慧，以各种资源角色，对他人进行传帮带。

而工作地点和来自家人的意见的趋势变化，则反映了随着年龄的增长，家庭重要性的增加。也可以解释为，事业在人的生活中所占的比重和事业发展的高度成正比，生活重心随着年龄一点一点从工作上转移到家庭上。

What a job entails is important up to 40 years old, but its importance decreases after 40. Studies of occupational development show that after achieving a peak in career development, people are faced with a decline in their own competitiveness, responsibility, and status. Some, at this stage, feel they have reached the end of their careers.

People at this stage can change the focus of their work from their own development to encouraging the young or discovering some new interest outside work to enhance their enjoyment of life.

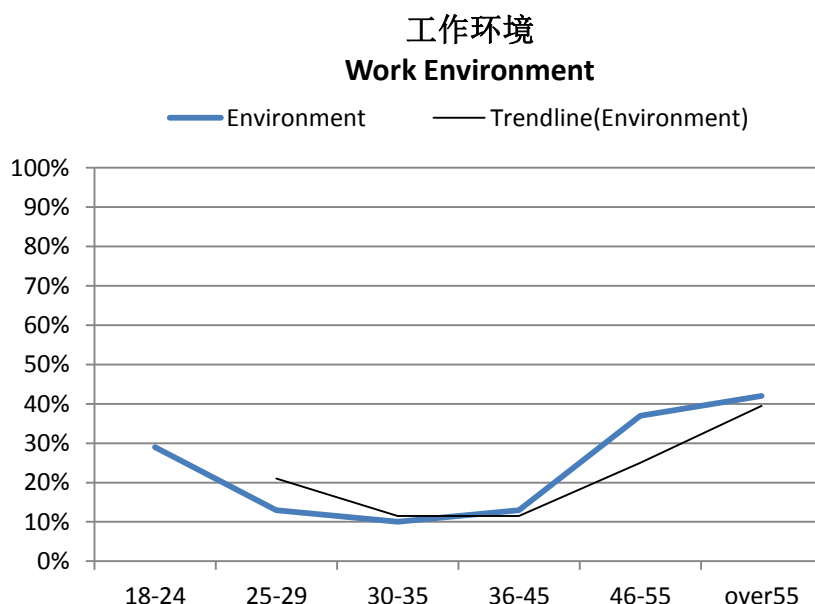
The importance of working location and what families think tends to change with age: the family becomes more important.

• 工作环境 Work Environment

工作环境是这九个因素最为独特的一个。因为它的变化呈”U”型，两端高，中间低。初入职场的新人们总是会对自己的职场生活充满了幻想，因此对环境的要求也会相对比较高。而在有了相当的经历之后，他们会更侧重于自身职业的发展而对周围的硬件条件没有太多的要求。当职业发展达到一定的水平后，工作的取得成绩的效用并不再像起初那么高，保证工作质量的情况下，改善工作环境会成为这一时期的主旋律。

Working environment is very important among these factors. When people first enter a job, they are full of ideas about what they can achieve. Some of these ideas are unrealistic but the newness of the experience means that the working environment is relatively important. Once they have some experience behind them they will be more focused on their own professional development and not too concerned about the surrounding conditions. Later, however, when they are fully established, they become more aware of their environment and conditions again.

图二十五 影响跳槽因素比例按工作环境分类 Figure 25 - Percentage of job-hopping factors categories by work environment



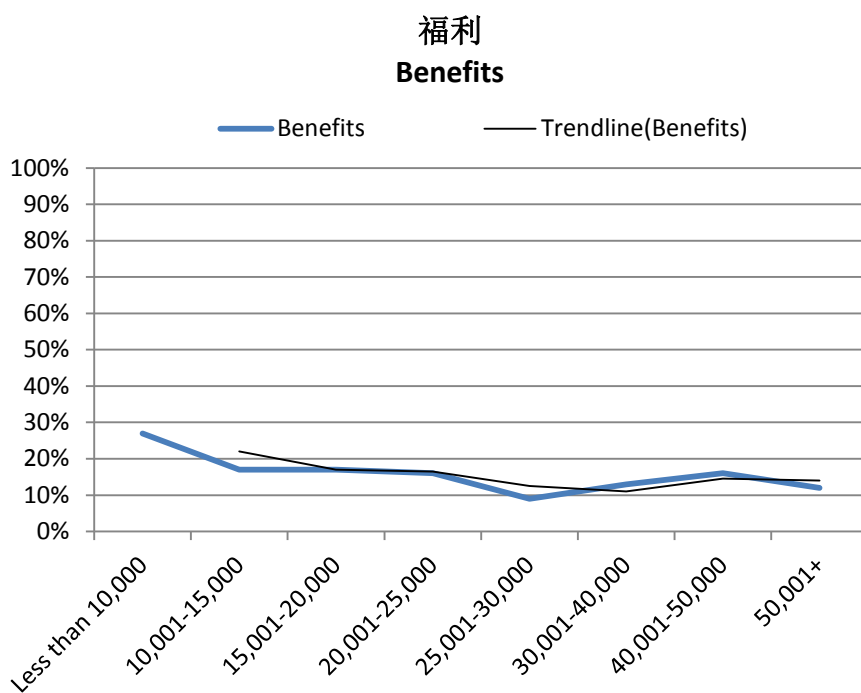
薪资比较 Salary Comparison

• 福利状况 Benefits

在对几个因素随着薪资状况的变化趋势的观察中，我们发现它的变化规律和马斯洛的需求层次理论有一定程度上的符合。因此，我们在这里可以假设人的需求的满足可以通过金钱来实现。确实，这在现实生活中也有一定的依据。接下来我们将根据人不同的需求层次来看看在不同薪资阶段下起较大作用的因素分别是什么。

While Abraham Maslow sees salary as a good indication of the level of fulfillment a person has achieved, he would suggest that it is not always at the top of the Hierarchy of Needs. Even when salary appears to be supremely important, there are other underlying factors.

图二十六 薪资比较比例按福利分类 Figure 26 – Salary comparison categories by benefits



• 工作地点状况 Work location

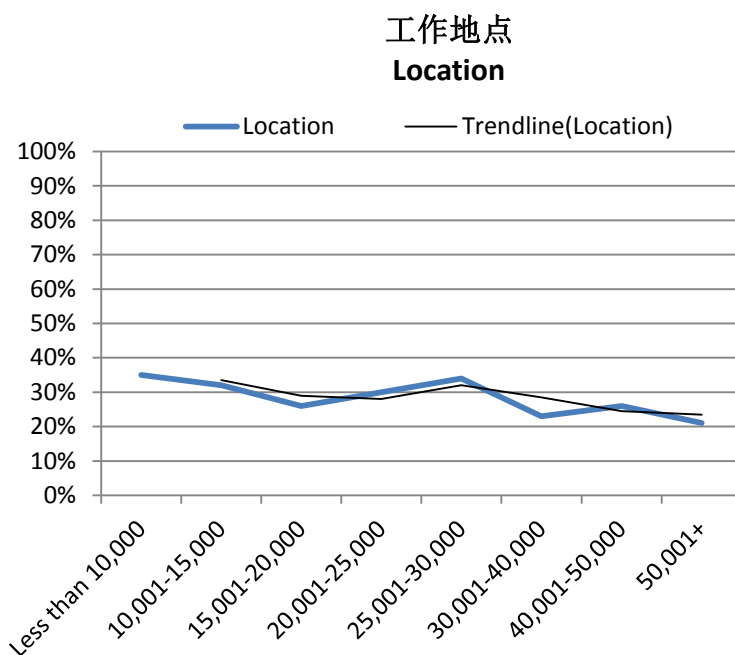
根据图表所示我们可以做出合理推测，福利和工作地点的最高点应当都落在 10,000 之前。根据马斯洛的需求理论，人最基本的需求是生理需求，也就是对温饱生活的追求。而在现代生活中，可以把基本生理需求定义为衣食住行的基本满足。福利通常包含了衣食住行中某个或多个因素，比如说，饭补、交通补贴等。

而公司办公地点无疑会对居住地的选择产生影响。旧观念中的成家立业在现代并不适用，对于家庭稳定的需求在现代人的排序就位于职业稳定之后。在寻求家庭稳定这一阶段的人群中，一般普遍的做法有三种：回到原籍地，留在工作地，去伴侣的工作地。公司想要留住人才的应对方法大体来看也有两种。如果在职员意愿的城市有分公司的可以将其进行内部调遣。但更为普遍的是利用提高福利、升职等吸引员工留下来。总之，对于收入越低的职员来说，这两个因素越为重要。

According to Maslow’s demand theory, physiological needs are the most basic, mainly the requirement of food and clothing. In modern life, the basic physiological needs can be defined as the basic satisfaction of food and clothing. Benefits usually contain one or more factors, such as food subsidies, traffic bonus, etc.

There is no doubt that work location affects the choice of residence. In the group of people who seeking for family stability, generally there are three common practices: returning to the area of their original residence, living near the workplace, moving to the partner’s place. There are two methods by which companies retain their talented employees. First, they might move the employee to a branch office which suits the family needs of the employee. Second, companies try to keep talented staff by using welfare and promotion. For staff at the lower end of the salary scale, these are the most important factors.

图二十七 薪资比较比例按工作地点分类 Figure 27 – Salary comparison categories by location

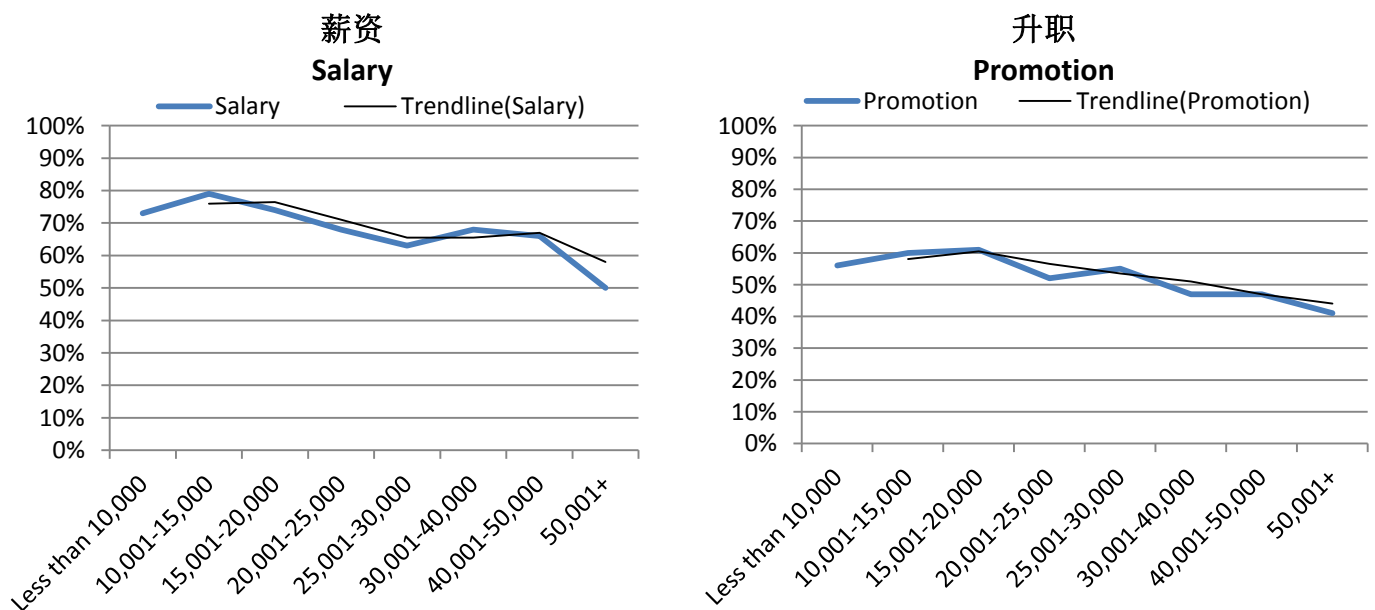


• **薪资和升值 Salary and Promotion**

根据马斯洛的需求理论，人最基本的需求是生理需求，也就是对温饱生活的追求。因此，在这一阶段，人是为报酬而工作的。因此，我们可以看到，对于薪资的需求在目前薪资较低的情况下较高，大约在 17,500 处达到最高点。随着目前薪资的增长，需求下降。按照需求理论判断，晋升机会因属于人们对于尊重的需求。但就现实而言，加薪与升职一般来说都是伴随关系，很难将它们彻底分开。所以就图表反应，升职的变化趋势与加薪几无二致，同样都在 17,500 左右达到最高点，然后随着薪资的增长而下降。

Salary is the main way in which the basic need for food and clothing can be satisfied. Salary level is the most important factor for those earning less than 17,500RMB. While promotion raises the respect in which people are held, a pay rise will generally have the same impact at this level.

图二十八 薪资比较比例按薪资、升职分类 **Figure 28 – Salary comparison categories by salary and promotion**

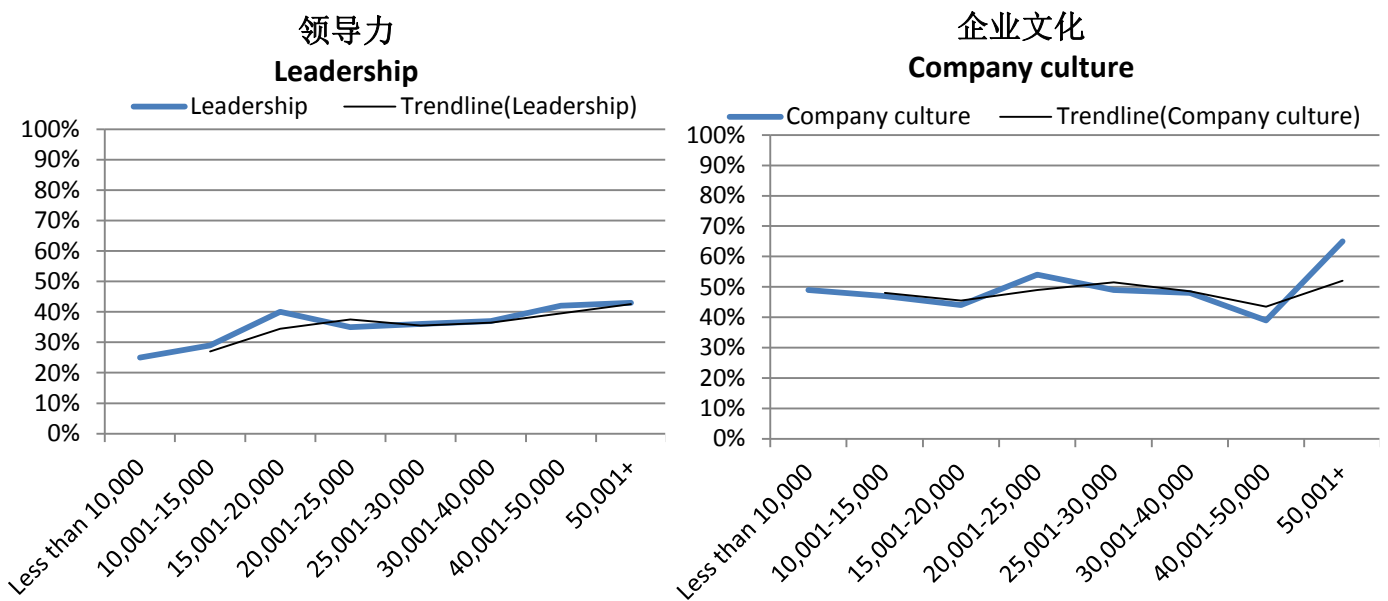


• **领导力和企业文化 Leadership and Company culture**

下一层次的需求是情感上的需求，称为社交需求。这里的社交采用它原本的意义，指的是人与人之间的交往。即包括与同学、同事之间的交往，也包括与家人、朋友之间的交往。在这种交往中，人们旨在获得亲情、爱情、友情等多种情感慰藉。因此在这一阶段，与领导上司的相处和公司整体环境是否融洽就会起到比较大的作用。营造有良好人际关系的公司对于这一阶段的人才会比较有吸引力。要建立温馨和睦的公司氛围则可以通过体育活动、拓展训练、公司聚会等实现。

Social needs - comradeship and friendship as between classmates, colleagues, family members, and friends - are important. In a company the line manager has a major responsibility for encouraging harmony and good relations between employees and the company. In the creation of a warm and harmonious atmosphere, sports activities, training-sessions and company parties all have a part to play

图二十九 薪资比较比例按领导力、企业文化分类 **Figure 29 – Salary comparison categories by leadership and company culture**

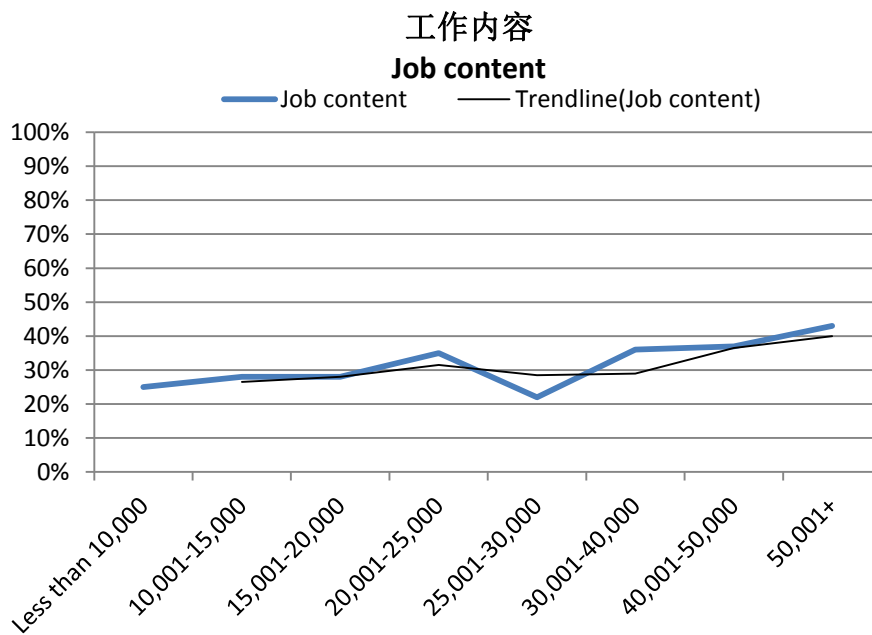


• **工作内容 Job Content**

在数据中反映出来的在影响跳槽的因素中可以契合的最高层次的需求是对尊重的需求。尊重的需求既有对外的也有对内的。这一阶段，人们会追求自我的成就感，同时也希望别人认同自己的价值。这其中主要的几个表现是成就、地位、名声、晋升机会等。工作内容是工作中让人产生成就感的源头。因此我们可以在趋势线上看到，对工作内容的追求在薪资超过 35,000 之后有一个明显的攀升然后逐步放缓呈缓慢上升状。

Data about factors affecting job-hopping show the need for respect high on the list. At all stages, people will pursue self-fulfillment, but they also want others to recognize their value. Achievement, status, reputation, and advancement all show the respect in which an employee is held. The trend line shows that job contentment in those with a salary of more than 35,000RMB/month is very important.

图三十 薪资比较比例按工作内容分类 **Figure 30 – Salary comparison categories by job content**



• **工作环境和来自家庭的意见 Environment and Family**

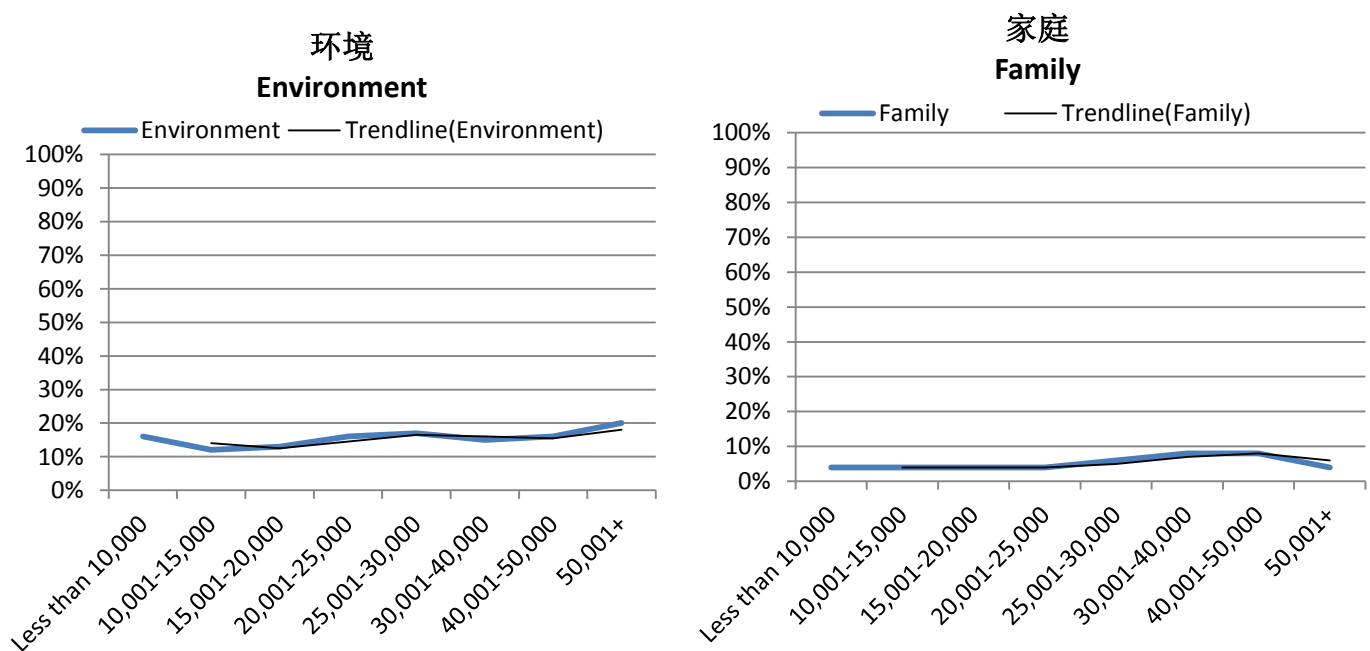
工作环境和来自家庭的意见这两个因素的变化趋势是在薪资分类下比较特殊的两个。他们在不同薪资状况下并没有呈现出很大的区别。

与企业文化相对应，这里的工作环境指的是硬件环境。我们可以看到，对于工作环境的需求一直保持在10%-20%的区间里。只要环境达到基本清洁整齐的要求，对于不同薪资的人来说，对于工作的环境并没有那么苛求。而来自家人的意见一直保持在10%一下的比率。相关原因在前面已经阐述过，这里就不加赘述了。

The importance of the work environment and what the family thinks have different importance depending on the salary.

The working environment means the physical environment. Its relative importance has remained at 10% to 20%. As long as it is clean and tidy, the work environment does not figure very highly while the views of the family remain at 10%.

图三十一 薪资比较比例按环境、家庭分类 **Figure 31 – Salary comparison categories by environment and family**



How much do you expect to increase your salary if you change your job?

如果换工作，你期望的薪资增长是多少？

调查发现，我们所得到的数据整体与去年变化不大。依旧有将近 80% 的人才需要超过 20% 的薪资涨幅才会选择跳槽。拥有合理薪资期待值，即 0%~30% 的人群的比例也没有变化，仍然为 57%。

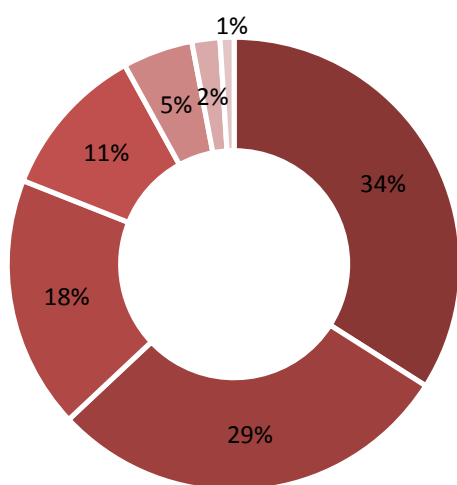
人们对于升值的期望大致由一下几个方面决定：总体经济形势、人才市场现状和个人素质。

According to the survey, we find that the changes between last year and this year are small. Almost 80% of people will not change job unless they receive a wage increase of 20%.

There are several decisive elements affecting the expectation of promotion: the overall economic situation, current employment market, and individual personality.

图三十二 跳槽薪酬增长期待值 Figure 32 - Expectation of increasing salary when change jobs

■ 21%-30% ■ 31%-50% ■ 11%-20% ■ 51%-100% ■ 0%-10% ■ 101%-200% ■ 200%+



总体趋势没有发生很大变化主要是由于近两年全国经济发展的形势总体变化不大，都处在稳定回暖的时期。但就对 07 年一年每年各省市颁布的企业工资指导线工资增长标准的观察不难发现，总体经济形势对于工资增长的影响是比较大的。比如在 2007 各省市企业工资指导线中规定的最低工资增长标准都在 10% 以上，平均水平在 15% 左右。而到了 2009 年，各省市纷纷下调企业工资指导线，部分地区甚至出现了允许工资负增长的情况。

同时人们对于薪资涨幅的预期也取决于人才市场的现状。随着越来越多的人力资源公司的出现和人力资源市场的完善，市场中的竞争也愈加激烈。因此，由供需引起的薪资增幅变动会越来越小。

The main reason why there is a little change is because the overall economic situation has changed little. But in some provinces and cities wage growth exceeded national trends. For instance, in some industries the minimum wage increases were above 10% in 2007, and averaged around 15%. In 2009, in many provinces, wage increases were below these levels.

At present, the expectation of wage increases depends on the talent available. Competition has become stronger with an increase in the number of human resource companies and the improvement in the job market. This inevitably means that wage increases will be smaller.

我们要提到的最后一个影响薪资增幅的因素是自身素质，这与从事职业的稀缺性有很大关系。就目前来说，中国人才市场在经济转型的过程中与企业需求略有出入。中国的经济结构并没有完全从劳动密集型的制造业向先进制造业及服务业转变，但人才结构的改变方向与经济结构略有偏差。由此出现了目前普通劳动力稀缺，专业技能类人才稀缺，普通大学毕业生过剩的场面。如果你是稀缺型的人才，较高的薪资涨幅也是企业比较愿意接受的；而如果你的不可替代性十分弱，那么就该好好考虑你提出的要求了。

The last influential factor is the quality of those seeking positions. Presently, China is in the process of economic transformation and the requirements of various enterprises differ slightly. China's economic structure is not about to shift entirely from labor-intensive manufacturing to advanced manufacturing and services. But there are different demands in the labour market: ordinary labor is scarce and the pool of those with professional skills is small. However, there is a surplus of ordinary university graduates. Only those in a scarce category can look forward to high rewards.

薪酬比较 Salary Comparison

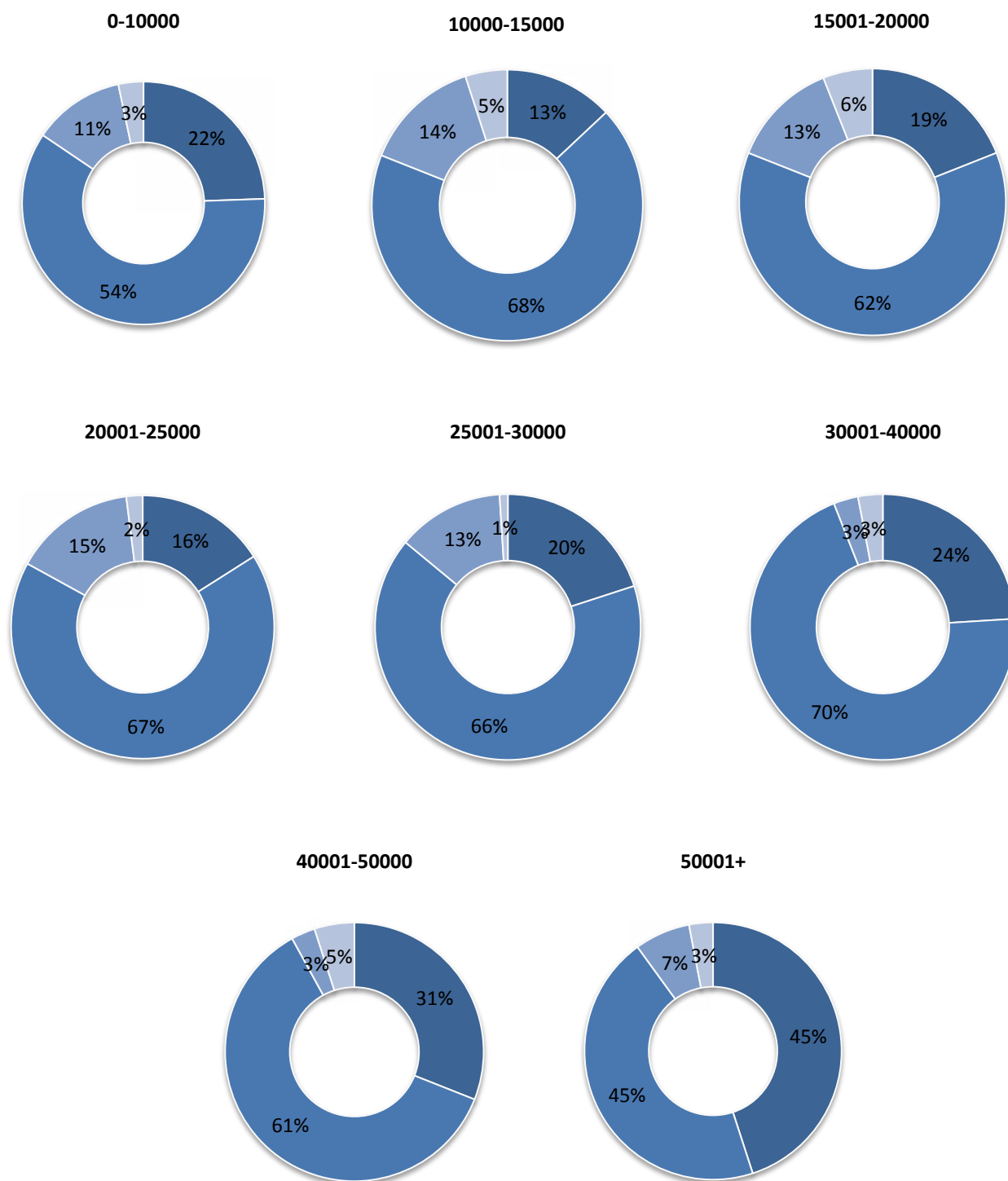
从图中我们可以看到，占各个薪资段比例最高的增长比例都是 21%-50%，这是认可程度最大的薪资涨幅。而认可薪资涨幅 0%-20% 的比例在月薪 20,000 以上的人群中随着月薪的增长而增长。我们可以认为，人们对于涨薪的具体数字的要求变化不大，因此在薪资基数比较大的时候，人们更愿意接受比例较低的薪资涨幅。以 30,000 为分界点，要求薪资涨幅在 51%-100% 的比例出现了比较大的跳水。薪资在 30,000 以前的人群中该项比例的数值都在 10% 以上，而对于超过 30,000 的人群，比例一下下降 3%，虽然之后略有回升，但始终都是个位的数值。

From the doughnut chart we can see that, at the lowest salary level 54% of employees want to change jobs in order to have a salary increase. This increases to 70% at the middle to higher levels but drops down to 45% among those earning the highest salaries.



图三十三 跳槽薪酬增长期待值按薪酬分类 Figure 33 - Expectation of increasing salary when change jobs categories by salary

■ 0%-10% ■ 11%-20% ■ 21%-30% ■ 31% +

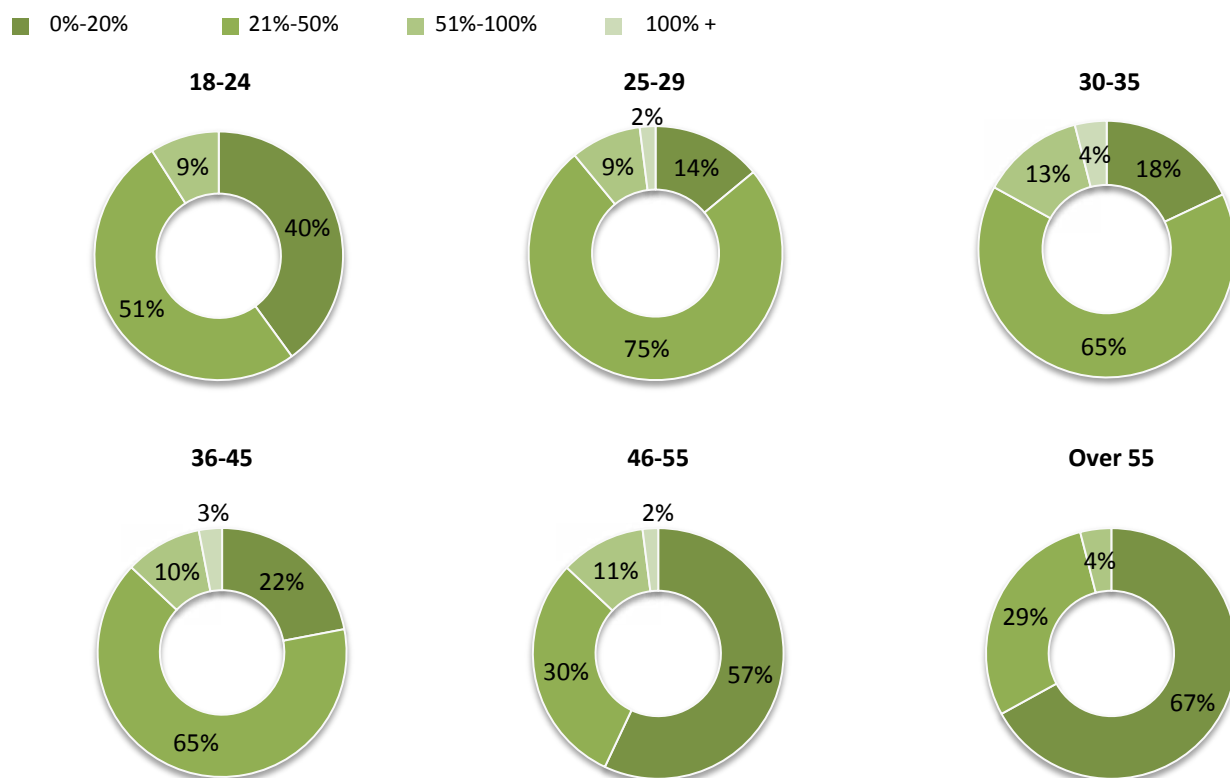


年龄比较 Age Comparison

从图中明显可以看到，21%-50%依旧是大家薪资涨幅期望最为集中的区域。但没一个涨幅阶段下对年龄进行纵向比较我们可以看到比较大的变化。由此，我们可以得到一个关于在某个年龄段适用的薪资涨幅的普遍规律。期望薪资涨幅在0%-20%之间的比例在24岁之后有大幅下降，但在29岁之后又开始上升。这意味着25-29岁这一阶段期望薪资涨幅在0%-20%之间的人数急剧减少，但同时我们又可以看到，这一阶段期望薪资涨幅在21%-50%的比例急剧上升。因此我们可以认为，24岁左右是第一次较大幅的涨薪的关键时刻，怎样在24岁之前提高自身素质来迎接这一涨薪机会是初入职场的人需要考虑的。而在30-55岁之间，我们可以看到，变化比较大的涨幅是51%-100%。这是人的时间价值所带来的经济价值的体现。在30岁之后的人，需要注意的是怎样好好利用自己工作以来的经验教训，将其转化为之后工作中独特的个人财富。

The charts below relating to age and expectation of salary increase show that while 75% to 65% look for a salary increase when changing jobs, this factor remains important throughout the whole of the age range.

图三十四 跳槽薪酬增长期待值按年龄分类 Figure 34 - Expectation of increasing salary when change jobs categories by age



Would you consider relocating to another city if the job opportunity is
really good?

如果有很好的机会，你愿意到其他城市工作吗？

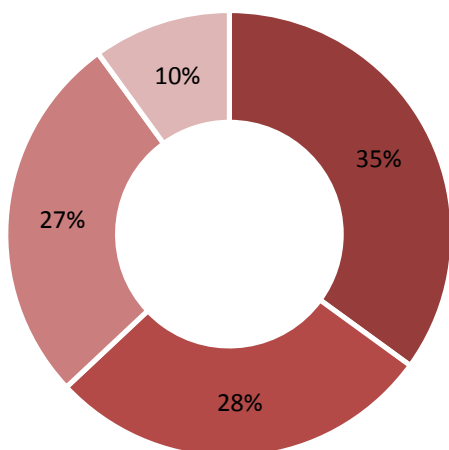
概况 Overview

从图中我们可以看到，一线城市、二线城市和任意城市各占三分之一左右，考虑二线城市的比例增加了 16%，愿意去任意城市的比例也比上期增长 5%。这说明在国家推动全面发展的政策下，辅助以快速发展的交通和通讯技术，城际差异逐步缩小，同城效应愈发明显。在交通十分便捷的情况下，一线城市周边的二线城市会成为人们寻求发展的新趋势。而多元化的生活选择也使得在大城市立足不再是每个人的憧憬，越来越多的人开始逃离北上广。在这样的形势之下，人们对于工作城市要求的弹性会越来越大，企业在挑选设立地点的时候局限性也会减小，可以有更多的选择。

From the chart we can see that, first-tier, second-tier and any other cities occupy about one-third of the whole survey. The proportion of people preferring second-tier cities went up by 16%, and the number of people wanting to move to other cities increased by 5% compared with the last survey. This shows the need for comprehensive development of policies in transport and communications. With transport as it is at present, second-tier cities are where people look for new employment opportunities. Life in a big city is no longer everyone's dream, and more and more people are fleeing Beijing, Shanghai, and Guangzhou.

图三十五 跳槽改变城市意愿 Figure 35 - Relocation choices

- 只在一线城市 Only first-tier cities
- 任何城市 Any City
- 考虑二线城市 Consider second-tier cities
- 其他答案请填写在调查结尾处的评论里 Others please add on comment at the end of the survey



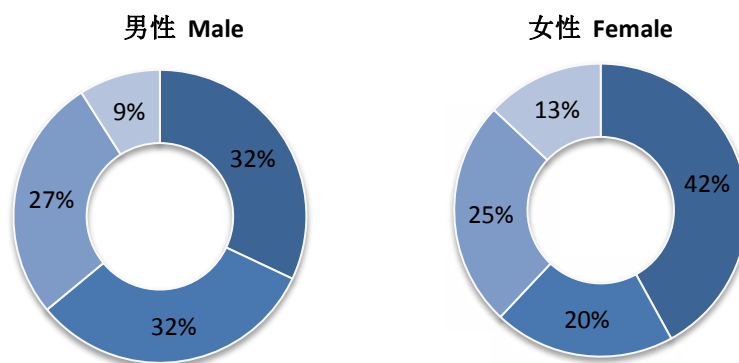
性别比较 Gender Comparison

在本次调查中，男性女性最偏好的依旧是一线城市，但在比例上的差别较大，女性对一线城市的偏好比例比男性高出 10%，可以大致说明女性更倾向于一线城市。而两性对二线城市的比例基本相同。愿意去任何城市工作的男性比例依旧比女性高出 10%，女性在愿意承担更强的工作任务的同时，对安稳生活的追求依旧很强烈。

In the survey, first-tier cities are still favorites for both male and female to work in. But 10% more females prefer to work in first-tier cities than males. Women are willing to take on more tasks and pursue wellbeing with enthusiasm.

图三十六 跳槽改变城市意愿按性别分类 Figure 36 - Relocation choices categories by gender

- 只在一线城市 Only first-tier cities
- 任何城市 Any city
- 考虑二线城市 Consider second-tier cities
- 其他答案请填写在调查结尾处的评论里 Others please add on comment at the end of the survey



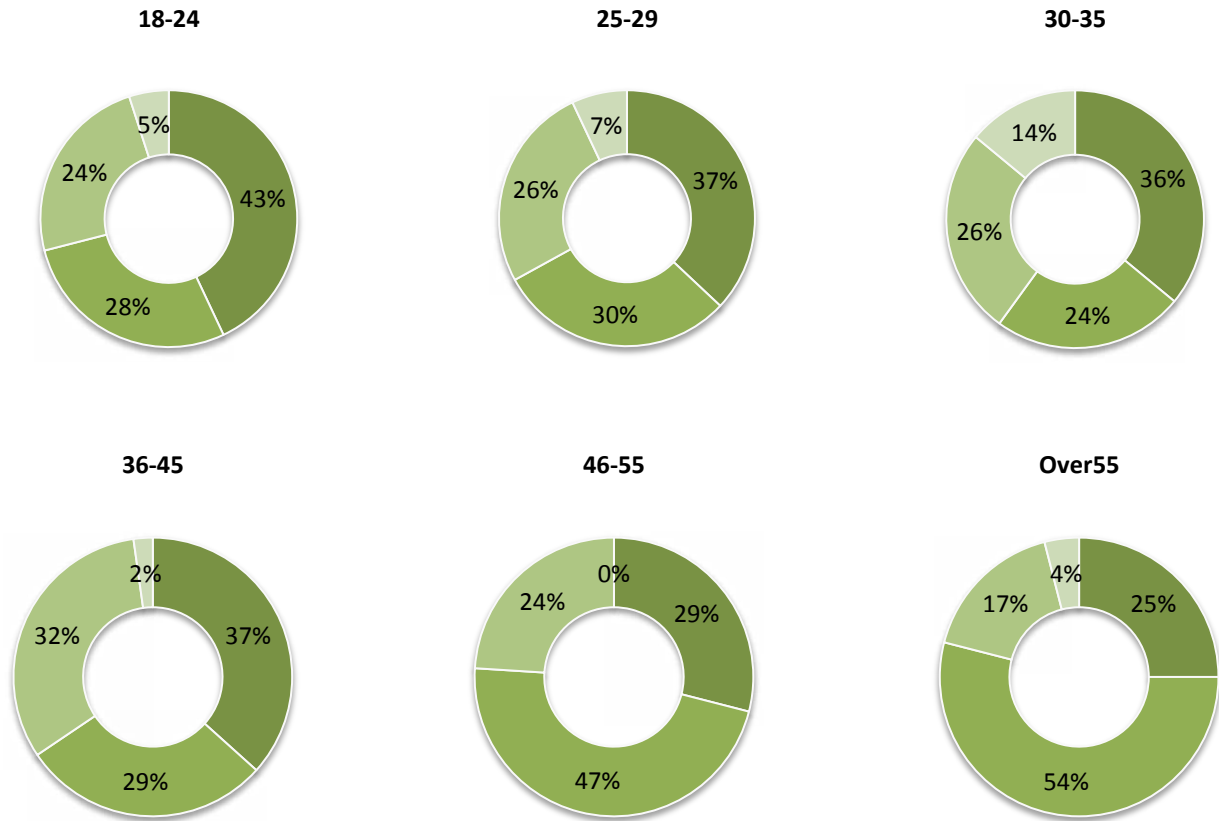
年龄比较 Age Comparison

从图中我们可以看到，只愿意去往一线城市工作的比例随着年龄的增长而下降，这可以从一个侧面说明随着职业的发展，地域的影响会越来越小。考虑二线城市的比例和持有其他意见的比例都在起初慢慢增长，在 36-45 岁之间达到顶峰，而后又慢慢下降。而愿意去往任意城市的比例在年纪比较小的时候缓慢下降，在过了 36-45 岁的阶段之后开始比较快的增长。这不能说是年纪大的人更偏好流动，只能说随着年龄的增长，对于城市的偏好变得缓和，并且人们愿意改变工作地点的意愿会在 36-45 岁之间达到最低点，那是家庭发展的关键时刻，人们比较倾向于安定的生活。

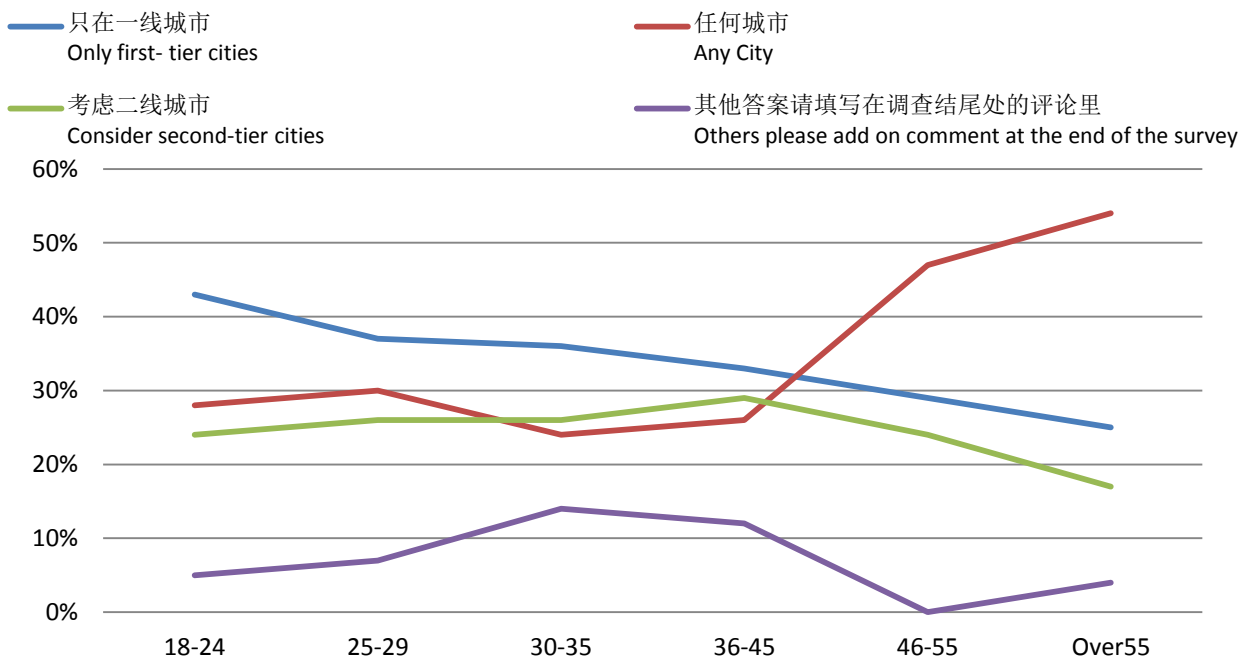
The picture illustrates that the percentage of people who would like to move to first-tier cities goes down as the age increases. The proportion who considered second-tier cities rises slightly among the young, and peaks in the 36 to 45 age-group; after that the rate drops slowly. The number of people who are willing to go to any city declines slowly, but after the 36 to 45 age group starts to grow. The age-group in which people are least willing to change their working location is that between 36 and 45. This age-group coincides with a critical stage in the development of the family when people prefer stability to change.

图三十七 跳槽改变城市意愿按年龄分类 **Figure 37 - Relocation choices categories by age**

- 只在一线城市 Only first- tier cities
- 任何城市 Any City
- 考虑二线城市 Consider second-tier cities
- 其他答案请填写在调查结尾处的评论里 Others please add on comment at the end of the survey



图三十八 跳槽改变城市意愿按年龄变化的趋势 **Figure 38 - Relocation choices trends categories by age**



How do you make career-change decisions?

你通过何种途径寻找新的工作机会？

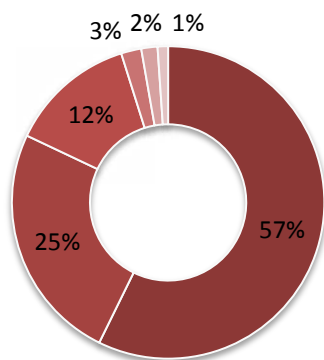
概况 Overview

与 2012 年的中国人才流动调查报告相比，人们希望通过猎头换工作的比例仍然遥遥领先于其他方式，占调查参与者的 56.90%，与去年的 57% 相比，并没有什么变化。在人们寻找新工作机会时，猎头的出现并非只是流行一时。通过与猎头顾问的联系和交流一段时间之后，很多人开始愿意与猎头保持良好的关系，为自己的职业发展随时做好准备。猎头顾问提供的职位信息，公司背景，模拟面试等全方位服务为候选人面试通提供了很大的助力。第二和第三受欢迎的换工作方式仍然是网络招聘和朋友推荐，分别占 24.76% 和 12.10%，与去年大同小异。

A comparison with TFS 2012, shows that in 2013 people still expect to change jobs via headhunters. The percentage (56.90%) is much higher than other choices (57% in 2012 and 56.9%, 2013). People are willing to keep in touch with headhunters and a good relationship with them is seen to be a useful preparation for further career development. Headhunters can provide job information, company background, mock interview preparation and other services. Online job seeking (24.76%) and friend recommendation (12.10%). These figures are broadly the same as last year.

图三十九 换工作方式选择 Figure 39 - Ways to change jobs

- 猎头联系 Headhunter Contacts
- 网络招聘 Online job seeking
- 朋友推荐 Friend recommendation
- 其他答案请填写在调查结尾处的评论里 Others please add on comment at the end of the survey
- 行业会展上结识的新雇主 Meet new employers through industry conferences
- 招聘会 Job fairs



值得关注的是作为传统招聘方式之一的招聘会仅占 0.57%，无论从公司类型，薪水水平还是年龄层次来看，传统的招聘正处在一个发展的瓶颈。一方面 80 后和 90 后已经成为了招聘会上求职主力，他们找工作的方式与心态相比早年都大不一样了，加上网络招聘的强烈冲击，现在招聘会想找一个合适的人选还是很困难的。从另一方面讲，很多招聘会面向的都是基础岗位，例如服务员，技工，普工等，对于中高端人才来说这样的招聘会根本没有去的必要。因此，招聘会未来是否会与时俱进，采取低中高端招聘会分层策略，是招聘主办方要考虑的问题之一。

Job fairs now account for only 0.57% of recruitment while online recruiting makes an impact in basic level positions, such as waiter/waitress, skilled worker and workman. For those who are looking for mid and high level positions job fairs provide little help.

公司类型比较 Company Type Comparison

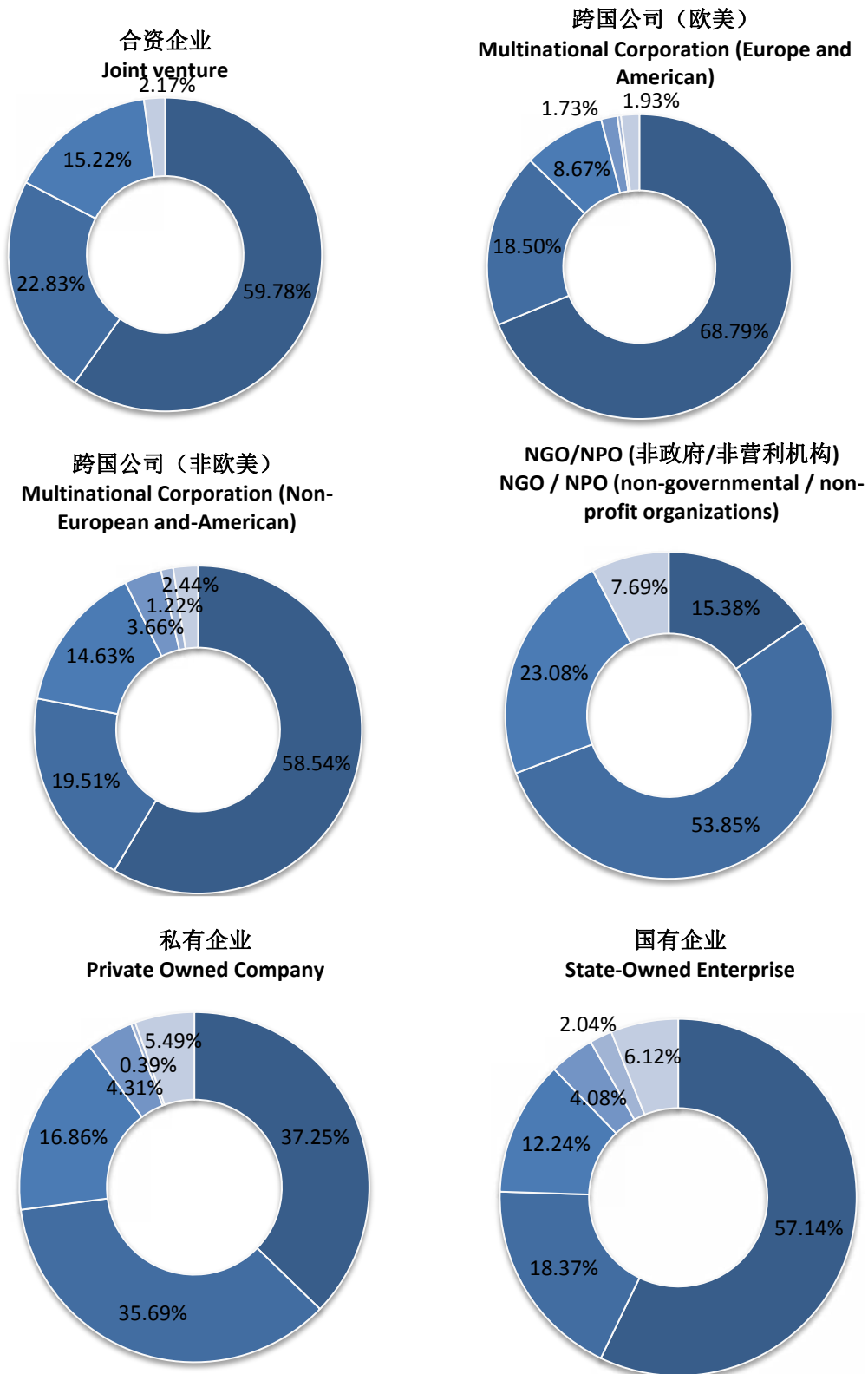
欧美和非欧美跨国公司以 68.79% 和 58.54% 的比例成为猎头的绝对拥护者，这组数据与上期相比并无太大变化。然而，值得注意的是国有企业的变化。国有企业使用猎头的比例从去年的 35% 上升到今年的 57.14%。同时，人们常常谈论的国企中的“关系”，今年也发生了变化。根据调查显示，今年国有企业中通过朋友推荐仅占 12.24%，与去年相比下降了约 14。在 2012 年下半年国企收入负增长的情况下，发生如此快速的变化也是可以理解的。从政策上来讲，这也响应了我国第十一届全国人大常委会“国有企业要改革，建立现代企业制度”的主题。

European and American Multi National Corporations Non-European and-American use headhunters (68.79% and 58.54% respectively). There has been no change since last year. But the use of headhunters made by SOEs went up from 35% to 57.14%. At the same time, there is a change in the well-known “guanxi” in SOE. Friend recommendations in SOEs only account for 12.24% of appointments, a 14% decrease from last year. The changes can be understood in the context of negative economic growth in the second half of 2012. From the viewpoint of government policy, what happens in SOE recruitment reflects the theme of reform in SOE in line with modern corporate systems as set out by the 11th NPC Standing Committee.



图四十 换工作方式按企业类型分类 Figure 40 - Ways to change jobs categories by company type

- 猎头联系 Headhunter Contacts
- 网络招聘 Online job seeking
- 朋友推荐 Friend recommendation
- 行业会展上结识的新雇主 Meet new employers through industry conferences
- 招聘会 Job fairs
- 其他 Others



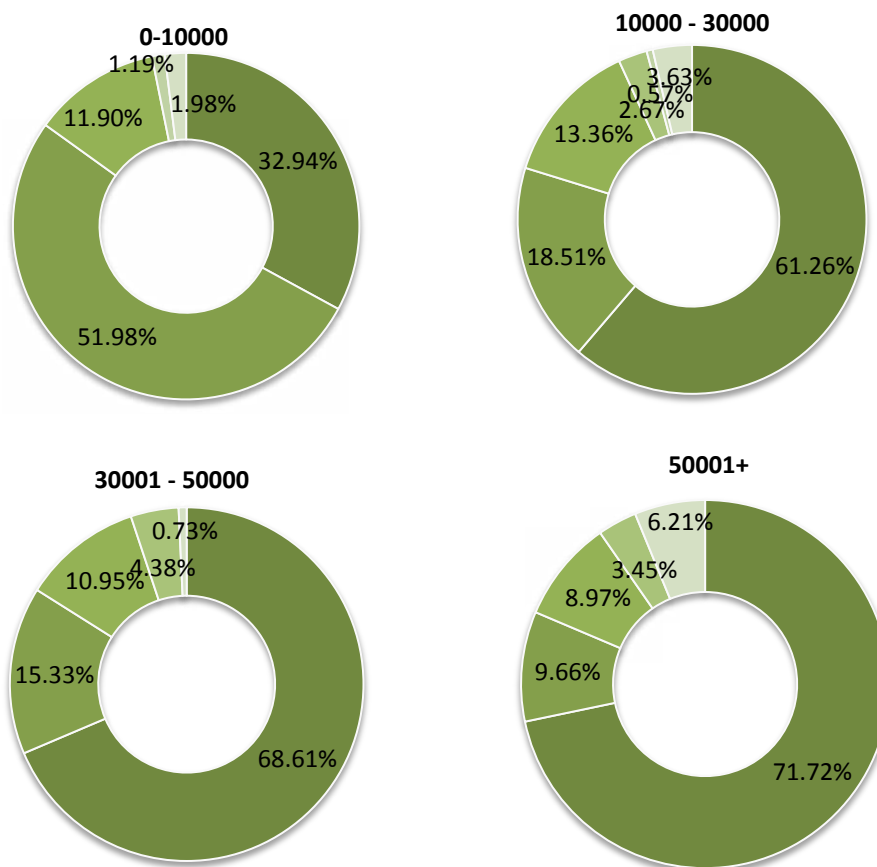
薪酬比较 Salary Comparison

人们对于猎头的选择与个人的薪酬状况成正比，月薪越高，选择猎头的比例就越大。与去年相比，对于月薪低于10000元的人，最受欢迎的找工作方式仍是通过网络招聘，该比例占51.98%，同比增长了约4%。朋友推荐在各个薪酬层次中的比例大概到10%左右，与去年相比没有太大变化。而月薪在10000元以上的人选择猎头比例都在60%以上，由此可见，猎头在中高端人才市场还是非常活跃，月薪50000元以上的人对于猎头的依赖程度更是高达71.72%，与去年不相上下。

The choice to contact headhunters correlates positively with salary level. To be specific, the higher salary one hopes for, the greater the chance of using headhunters. For people whose salary is below 10000RMB, the most popular way to find a new job is online (51.98%), a 4% increase on last year. Friend recommendation remains at 10% for all salary levels. At salaries above 10000 Yuan more than 60% contact headhunters. In this regard, headhunters are very active in the mid and high end job market. For those whose salary level is over 50,000RMB/month, the reliance on headhunters is 71.72%; the same as last year.

图四十一 换工作方式按薪酬分类 Figure 41 - Ways to change jobs categories by salary

- 猎头联系 Headhunter Contacts
- 网络招聘 Online job seeking
- 朋友推荐 Friend recommendation
- 行业会展上结识的新雇主 Meet new employers through industry conferences
- 招聘会 Job fairs
- 其他 Others



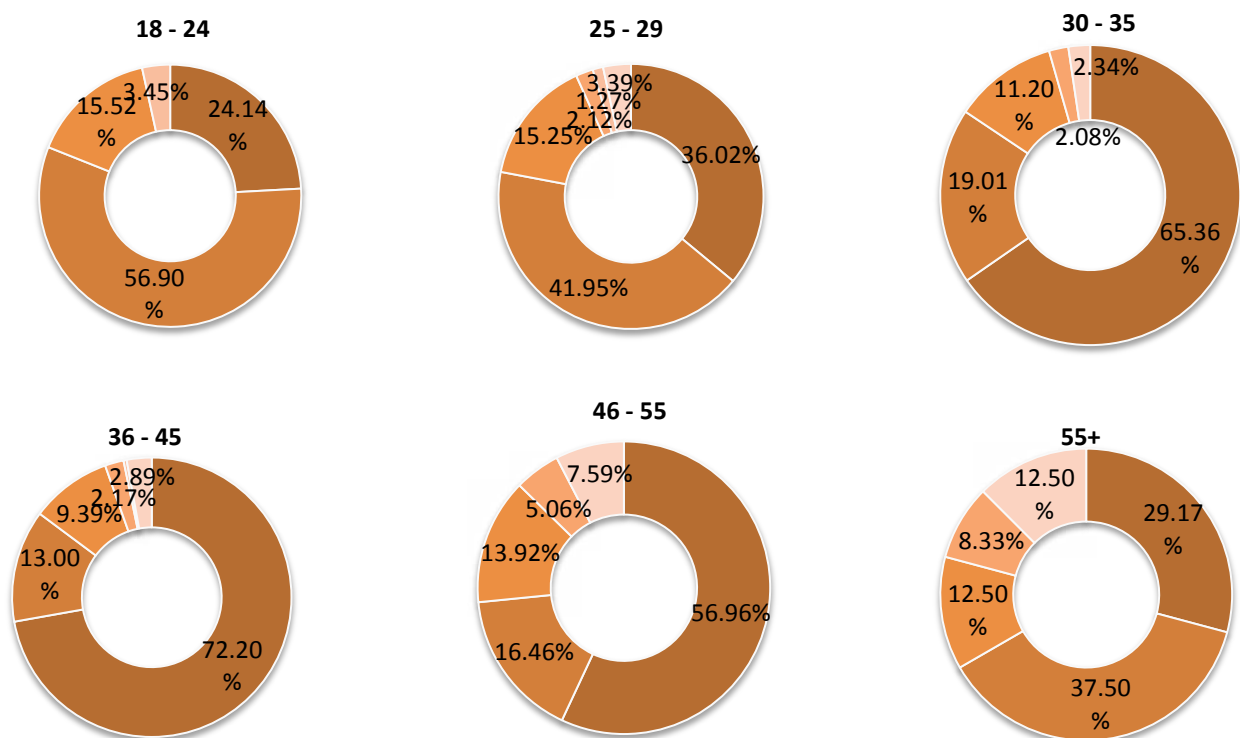
年龄比较 Age Comparison

从 18 岁到 45 岁，随着年龄的增长，人们则越倾向通过猎头换工作。18 到 24 岁的大多是毕业生和刚参加工作不久的人，他们最喜欢的方式是通过网络招聘，比例高达 56.90%，与去年的数据大同小异。而随着年轻人在职场上的不断成长，25 岁至 29 岁中有 36% 的人会选择猎头。到职场黄金时期，36 岁到 45 岁间的人有 72% 会通过猎头换工作，可见猎头在年龄段是很受欢迎的。然而，从 46 岁到 55 以上，人们对于猎头的热情就逐渐降低。与上一期不同的是，55 岁以上的人今年仅有 29.17% 通过猎头换工作，同比大幅下降了约 43%，考虑到经济形势，事业稳定，家庭以及退休问题，都可能是该年龄段的人不再考虑新工作机会的原因。

From age 18 to 45, people increasingly change jobs via headhunters. Between 18 and 24 years these are mostly new graduates 56.90%, of whom look for jobs on the internet, more or less the same as last year. 36%. Of people between the ages of 25 and 29 choose headhunters while from 36 to 45 years, 72% prefer headhunters to improve career prospects. However, those between 46 and 55, gradually resort to other sources of new jobs. For example, only 29.17% people who over 55 years old contacted headhunters for new jobs. To some extent, the economic situation, stable career, family concerns and retirement factors that these people do not seek new job opportunities.

图四十二 换工作方式按年龄分类 Figure 42 - Ways to change jobs categories by age

- 猎头联系 Headhunter Contracts
- 网络招聘 Online job seeking
- 朋友推荐 Friend recommendation
- 行业会展上结识的新雇主 Meet new employers through industry conferences
- 招聘会 Job fairs
- 其他 Others



Did you update or post your CV on any recruitment/job-hunting websites
in the last 6 months?

你在过去的 6 个月里有在招聘网站上更新简历吗？

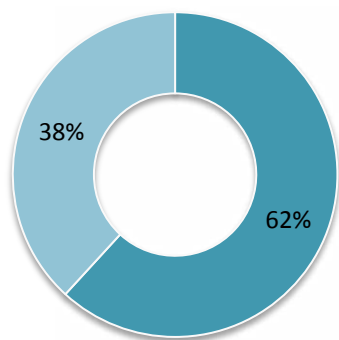
概况 Overview

过去半年里有 62%的人在网更新过简历，这至少表明有超过一半的人增加了换工作的打算。相比上一季，虽然只增长了 7%，但是不能小看这个数字。

Over the past six months, 62% have updated their CVs on the Internet. This shows that more than half of the workforce plan to change jobs. Although this was an increase of only 7%, it cannot be ignored.

图四十三 六个月内是否更新简历 Figure 43 - CV updated in past 6 months

- 有 Yes
- 没有 No

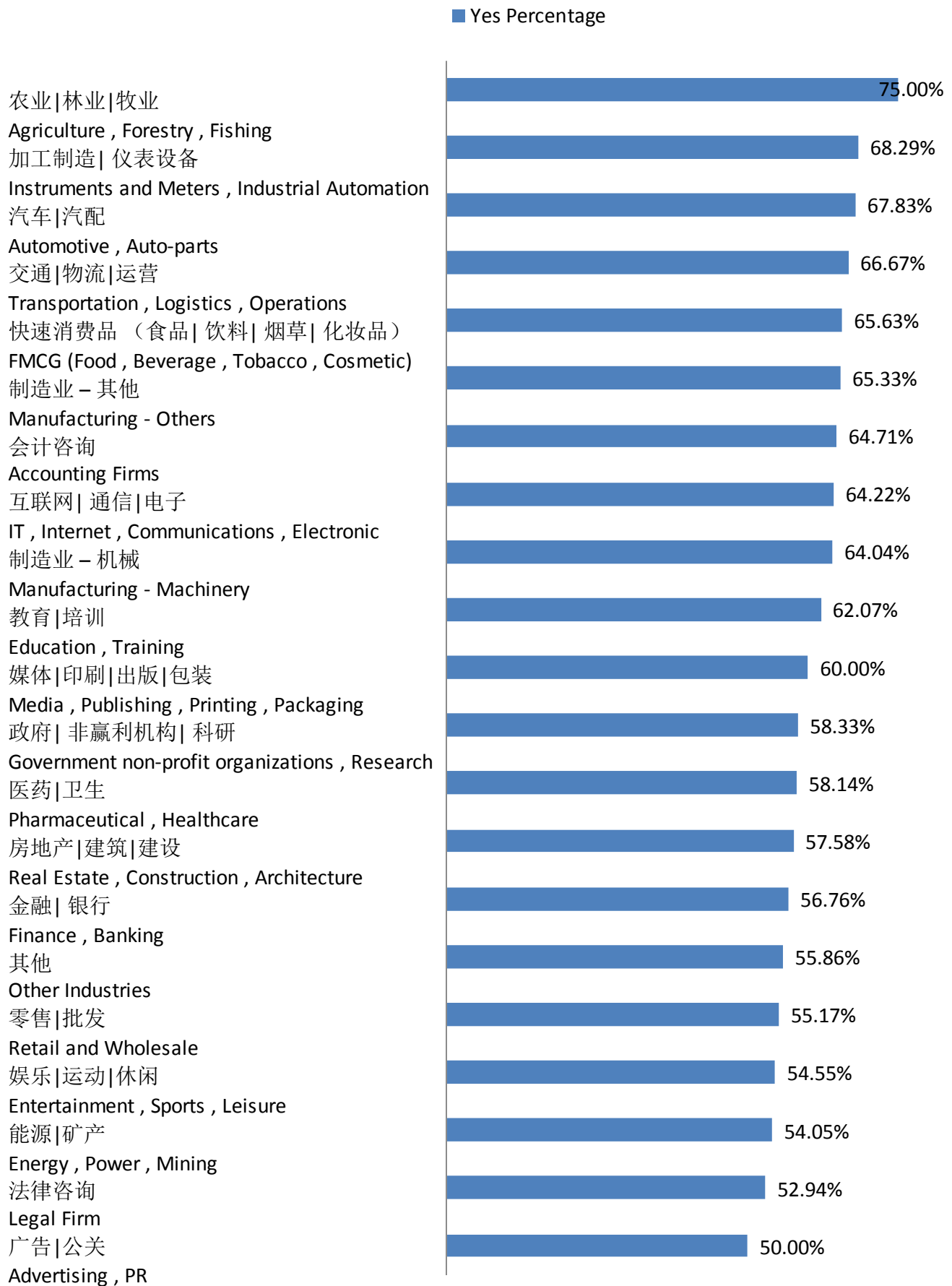


行业简述 Industry Scanning

汽车汽配行业人员更新简历比例非常高。总体上看，今年车市依旧火热，从汽车行业净利润指数的走势上不难看出，人力增速的拐点即将出现。物流行业人士更新简历仅次于汽车汽配行业人员。物流行业作为 12 个人才短缺的行业之一，其发展越来越备受瞩目。中国国家统计局统计 2011 年我国的物流人才一共有约 780 万，根据 China Daily 报道，在第十二个五年计划中（2011-2015），每年物流行业预计将增加 40 万名人才。相比过去一年跳槽率，广告公关行业的简历更新比例少了很多。主要的原因是新媒体的发展对传统媒体人带来了巨大的冲击力，尤其是网络的飞速发展给新媒体带来了大好的发展前景，阻碍了传统媒体的工作者们的职业发展，纷纷为自己的职业生涯做打算。

Automotive and auto-parts industry staff updates CVs frequently. Generally, the auto market is still a hot cake, as we can see from the net margins, and projected increase in demand. The logistics industry closely follows behind automotive and auto-parts industry. There are total 7,800,000 logistics employees in 2011 according to the National Bureau of Statistics of China. China Daily News forecasts an increase of 400,000 people in the logistics industry per year in the 12th Five-Year Plan (2011-2015). However, the number of logistic graduates cannot satisfy this high demand. Further, the percentage of advertising and PR employees who submitted CVs is much less than those who changed job last year. The primary reason is the development of new media against traditional advertising, particularly, the fast growth of the internet. The new media developments have altered the career plans of the traditional media employee.

图四十四 六个月内更新简历比例按行业分类 **Figure 44 - percentage of CV updated in past 6 months categories by industry**

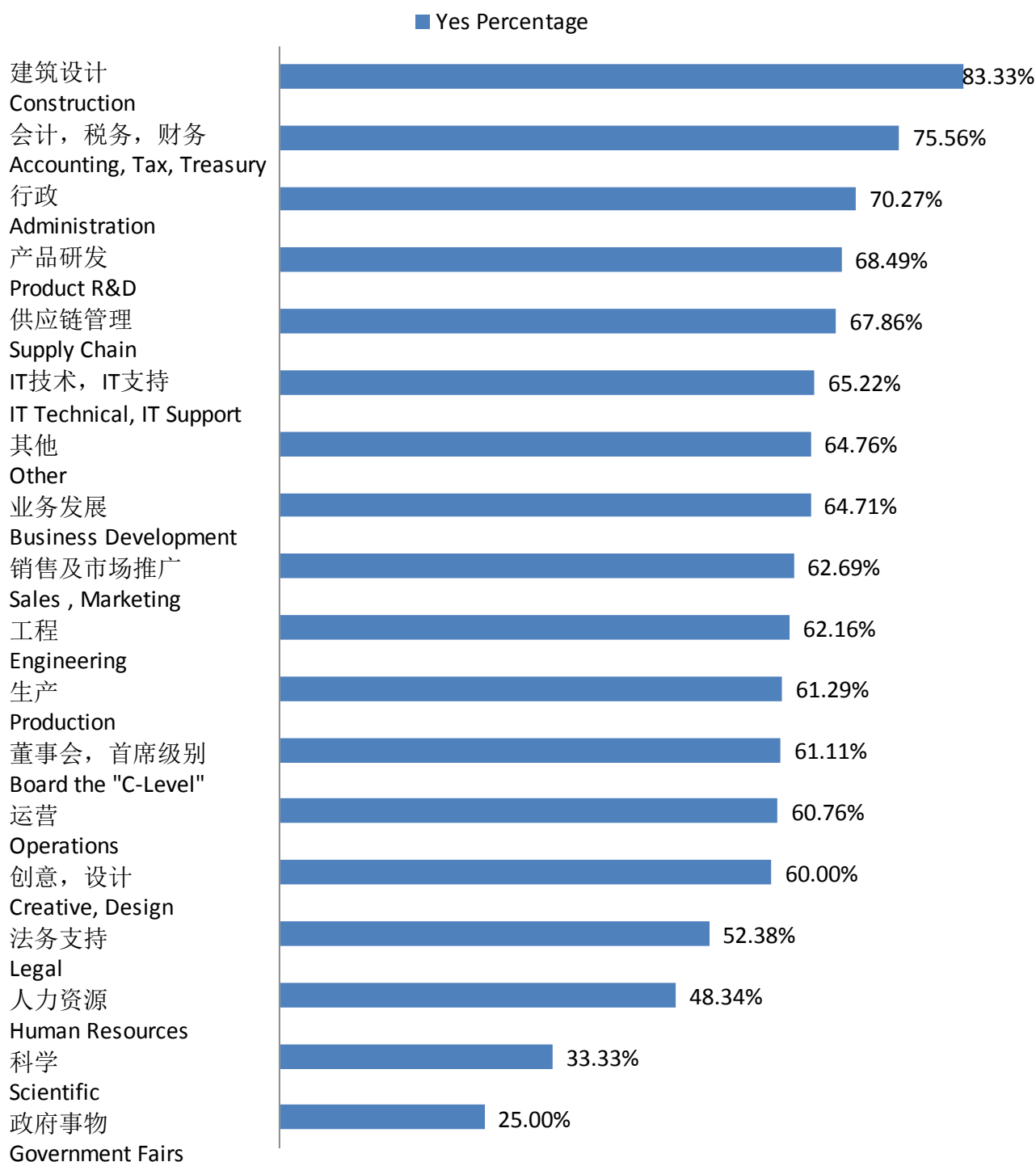


职能简述 Function Scanning

由于现在经济形势的不稳定，虽然会计税务部门人员更新简历很频繁，但是在第二题中经济形势对换工作意愿的比例很少，显而易见，经济对求职的影响非常重要，很多会计人才虽然经常更新简历，但是迫于经济的影响下，换工作的意愿却很低迷。

Although accounting, tax, and treasury employees update their CVs frequently, the job-change rate is quite low because of the unstable economic situation. In these areas the performance of the economy has a greater effect on the supply and demand of jobs.

图四十五 六个月内更新简历比例按职能分类 Figure 45 - percentage of CV updated in past 6 months categories by function

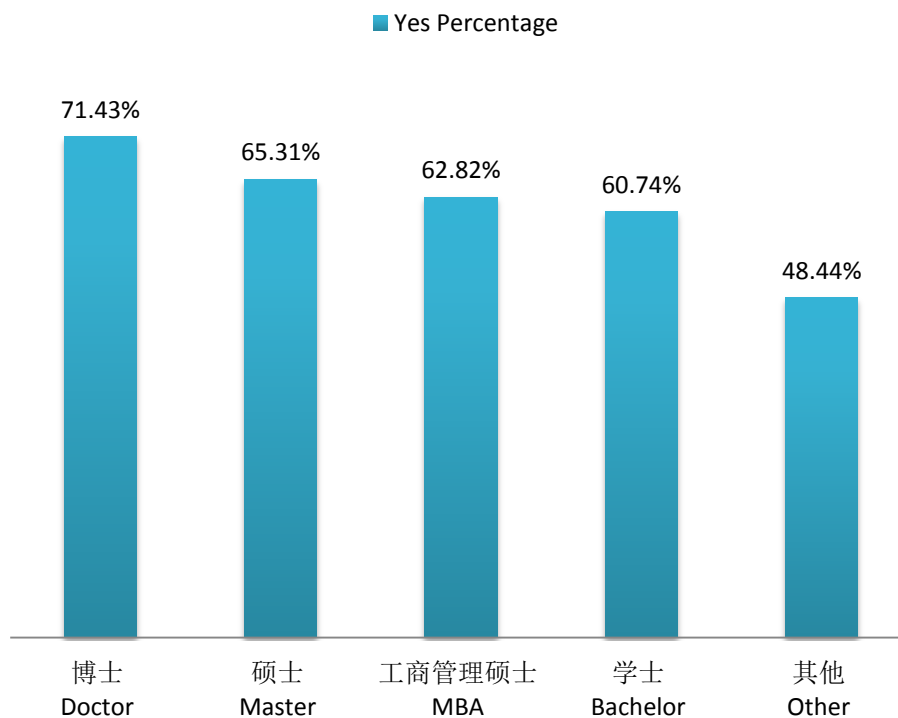


教育背景简述 Education Background Scanning

总体看来，除了博士背景的人才简历更新稍微频繁一些，硕士、MBA、学士学历背景的人才更新简历的比例还是比较平均。MBA 简历更新率不低，在过去的一年内有 41% 的 MBA 换过工作，并且 10 个 MBA 里有 6 个目前还有跳槽的打算。而在过去的半年内，近 63% 的 MBA 都在网站上更新过自己的简历，相信还有很多 MBA 通过其他方式更新

Those with doctorates updated their CVs more frequently than those with other degrees, including MBAs. In the past year, 41% of MBAs changed the jobs, and 60% are still considering a change. Moreover, 63% of MBAs updated their CVs online during the last 6 months. This shows that rather more than half of MBAs are not satisfied with their current position.

图四十六 六个月内更新简历比例按教育背景分类 Figure 46 - percentage of CV updated in past 6 months categories by education background



If you did update/post your CV on the internet in the last 6 months, how many responses did you receive?

如果你在过去的 6 个月里在网上更新了自己的简历，你收到了多少反馈？

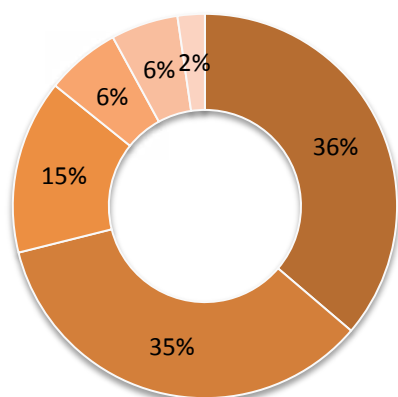
概况 Overview

与上一季报告相比，总体比例相差不多。不过没收到任何反馈的人数从12%减少到了2%，从这一点，我们可以看出事实上，候选人的工作机会还是有所增大的。

Compared with the last quarter report, the overall proportion of job-seekers submitting CVs has not changed much. The number of people who received no feedback dropped from 12% to 2%. This shows that job opportunities have increased.

图四十七 网投简历反馈 Figure 47 - feedbacks of updating CV online

01-05 05-15 16-30 31-50 50+ 0



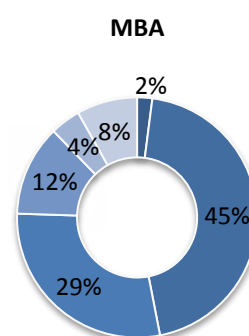
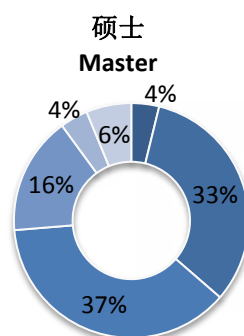
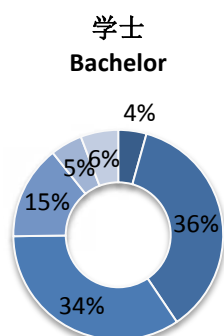
教育背景比较 Education Comparison

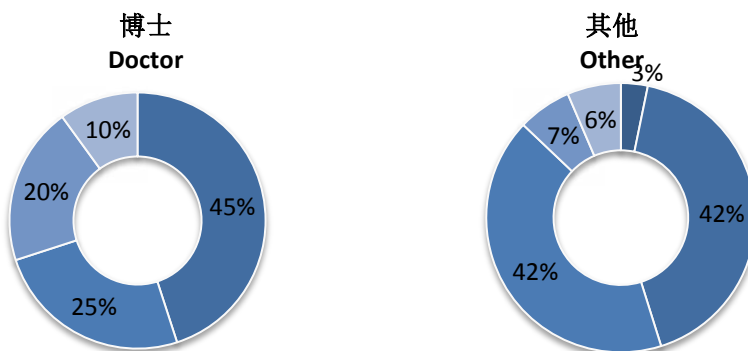
MBA 得到简历反馈的比例几乎快到100%。虽然上面的数据显示基本上 MBA 只要投了简历，就肯定有工作的机会，但是别忘了 63%的 MBA 都在考虑换新工作，并且仅有 35%能得到高薪，也就是说其实 MBA 课程并不是高薪工作的直通车。

From the chart we can see that almost 100% of MBAs received feedback. However, even though the figures show that MBAs do get jobs if they send resumes, 63% of MBAs are still considering changing jobs. Since just 35% have high wages, it is clear than an MBA program is not a direct line to a high-paying job.

图四十八 网投简历反馈按教育背景分类 Figure 48 - feedbacks of updating CV online categories by education background

0 1-5 5-15 16-30 31-50 50+



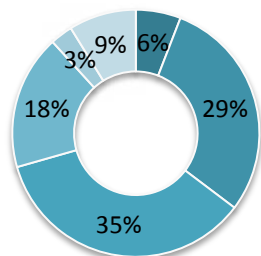


职能简述 Function Scanning

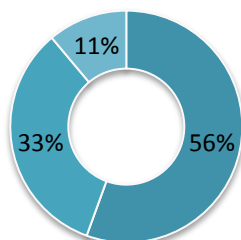
图四十九 网投简历反馈按职能分类 Figure 49 - feedbacks of updating CV online categories by function

0 1-5 5-15 16-30 31-50 50+

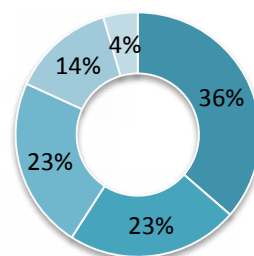
会计, 税务, 财务
Accounting, Tax, Treasury



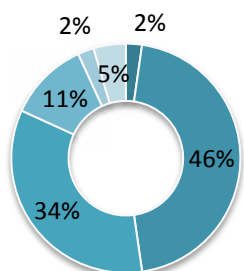
行政
Administration



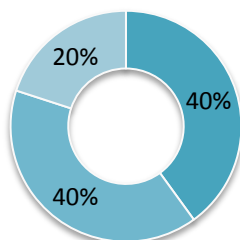
董事会, 首席级别
Board the "C-Level"



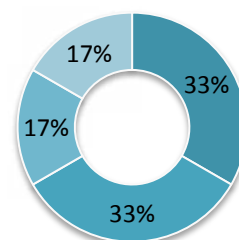
业务发展
Business Development



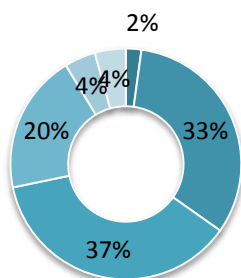
建筑设计
Construction



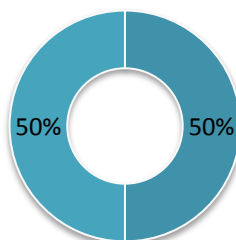
创意, 设计
Creative, Design



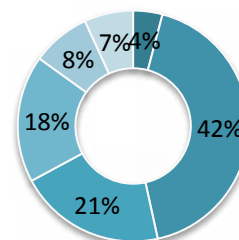
工程
Engineering



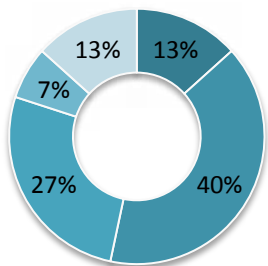
政府事务
Government Fairs



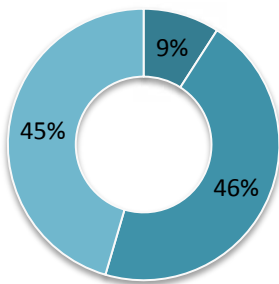
人力资源
Human Resources



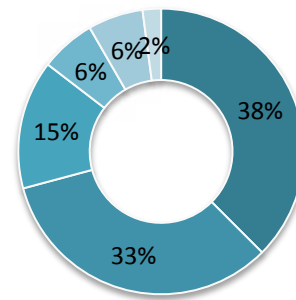
IT技术, IT支持
IT Technical, IT support



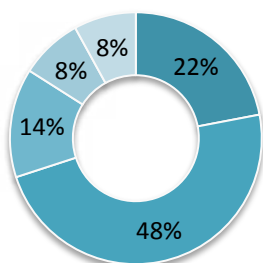
法务支持
Legal



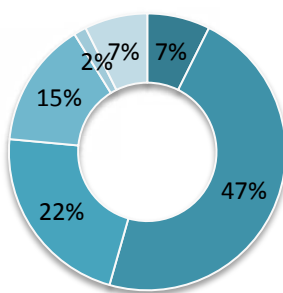
运营
Operations



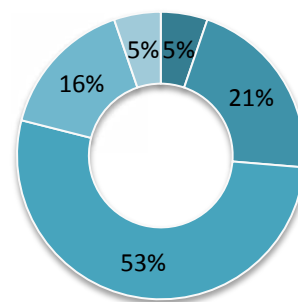
产品研发
Product R & D



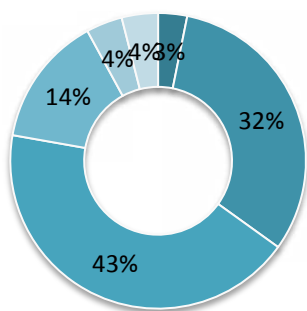
其他
Other



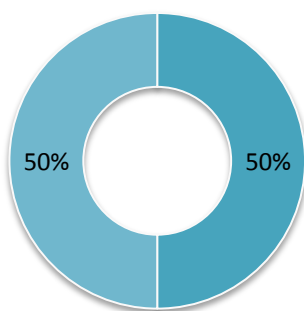
生产
Production



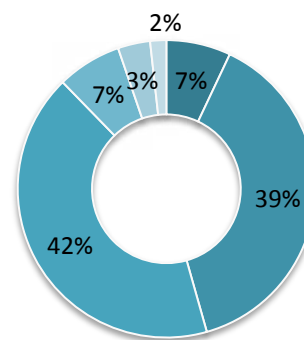
销售及市场推广
Sales & Marketing



科研
Scientific



供应链管理
Supply Chain



Of the responses you received, were most of the responses by phone or
by email?

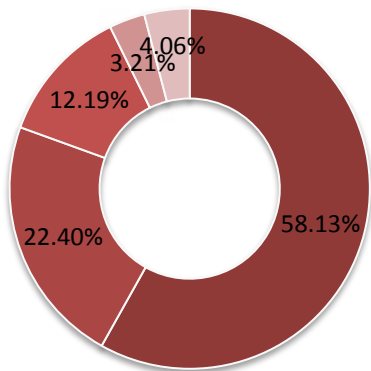
在你收到的所有反馈中，绝大多数的反馈是通过电话还是电邮？

今年数据与去年基本一致，由此可见，电话沟通中快捷方便直接的优势为大多雇主所认可。22.40%的人选择了通过邮件收到反馈，罗迈国际顾问在此建议，邮件可作为确认的重要工具，电话和邮件应同时使用，双管齐下，效果更佳。

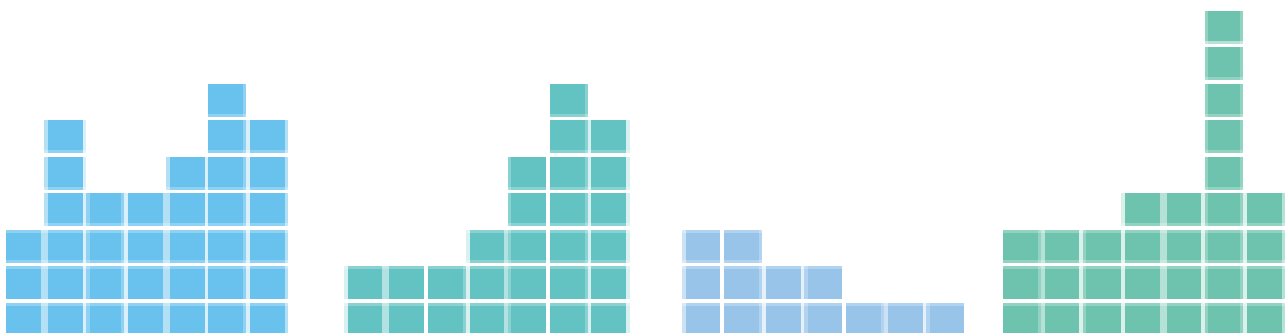
The results are essentially the same as in the last TFS report. Telephone communication is considered to be direct, convenient and efficient by most employers. 22.40% of respondents had replies by email. A consultant from RMG Selection recommends that telephone call and email should be used together.

图五十 简历反馈来自的方式 Figure 50 - the ways of most of the responses received

- Mostly phone 大部分通过电话
- Mostly email 大部分通过电邮
- Equal 一样的概率
- Other 其他



58%
participants received phone call as response



Of the responses you received, were most of the responses directly from hiring companies or from 3rd parties (i.e. head-hunters/recruiters)?

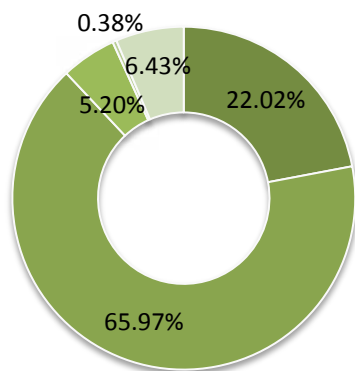
大部分的反馈是直接来自招聘公司还是第三方（比如猎头）

来自猎头和招聘公司反馈数据与去年相比基本保持一致，65.97%的面试反馈都来自猎头。今年新增加了一半一半的选项，比较猎头和直接招聘方的活跃程度，目前来看猎头在

Compared with last year, the level of response from headhunters and direct hiring companies has remained the same: 65.97% of interview feedback comes from headhunters. In this year's TFS, we compare the effectiveness of headhunters and direct hiring companies. At the current stage, headhunters are rather more active than direct hiring companies.

图五十一 招聘电话从哪里打来 Figure 51 - the parties who give you hiring calls

- 大部分是来自猎头 Mostly recruiters/headhunters
- 大部分是来自招聘公司 Mostly direct hiring
- 不清楚 Not sure
- 一半一半 50% - 50%
- 其他 Other



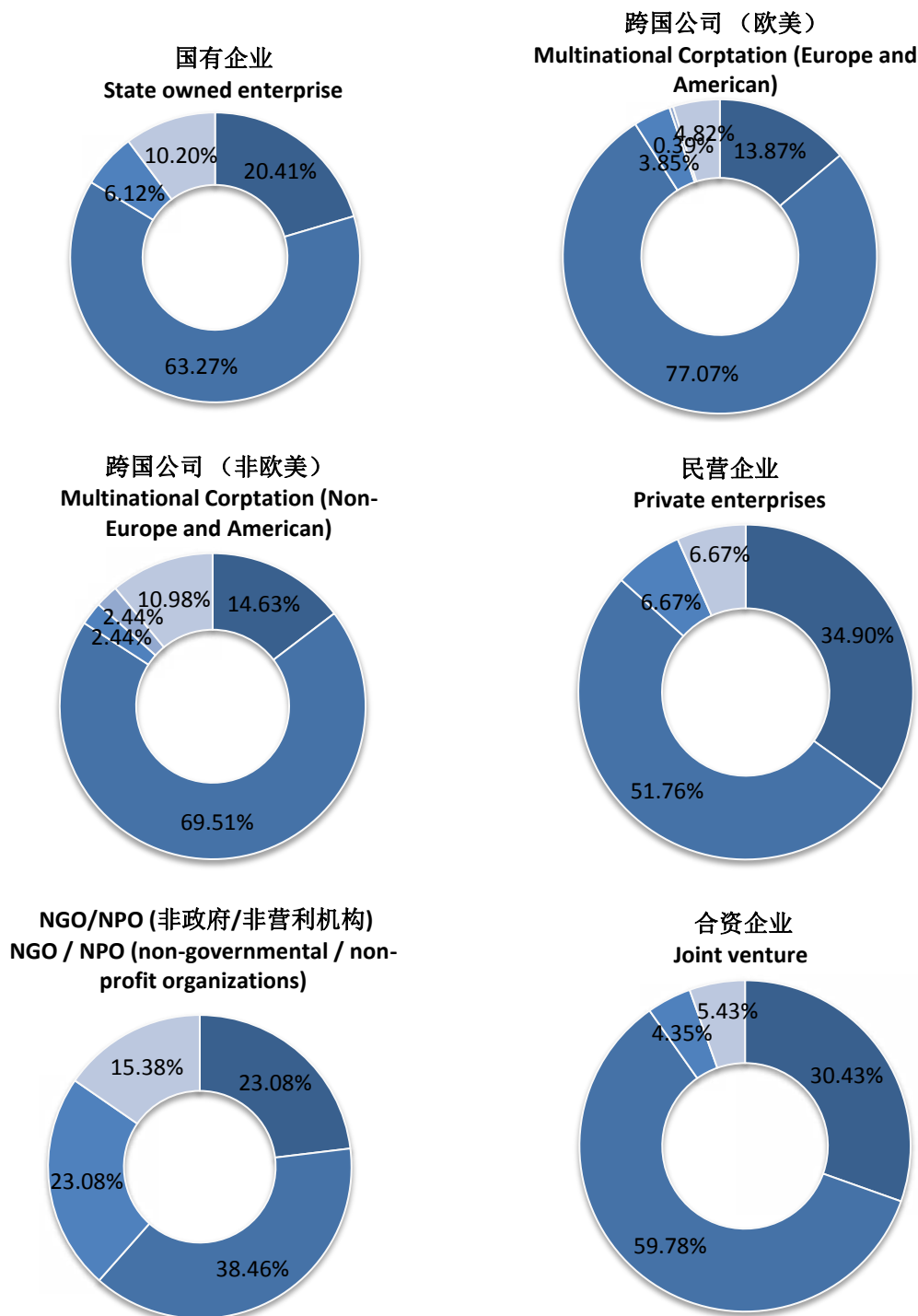
公司类型比较 Company Type Comparison

与去年相比，猎头反馈的比例在 SOE 中从 43%迅速上升到了个 63.27%，紧随欧美以及非欧美跨国公司中猎头反馈的比例，分别为 77.07%和 69.51%。相比之下，直接招聘方在国有企业中的反馈数量则从 46%降到了 20.41%，由此可见，国有企业开始和猎头公司交朋友了。值得注意的是，对于一直以公益性为主的 NGO 人士，通过猎头得到面试反馈的也高达 38.46%，而且尚有 23.08%的人不清楚猎头和直接招聘方的关系，根据 2010 年的《中国公益人才发展状况及需求调研报告》80%的 NGO 人士最终都会因为生活所迫而离开该行业。

The percentage of headhunter feedback in SOE has gone up from 43% to 63.27%. This closely follows the data of MNC (Europe and American) and MNC (Non-Europe and American), which account for 77.07% and 69.51% respectively. Comparatively, feedback from direct hiring companies has fallen dramatically from 46% to 20.41%. It seems that that SOEs have started to make friends with headhunting companies. It is worth noting that the NGOs have started to get feedback from headhunters, as much as 38.46%. As for the percentage of NGO people who do not know the difference between headhunters and direct hiring companies, the number is 23.03%. According to China NGO Talents Development and Needs Research Proposal, 80% of NGO people will choose to leave the industry due to the pressures of the work.

图五十二 招聘电话来自哪里按企业类型分类 Figure 52 - the parties who give you hiring calls categories by company type

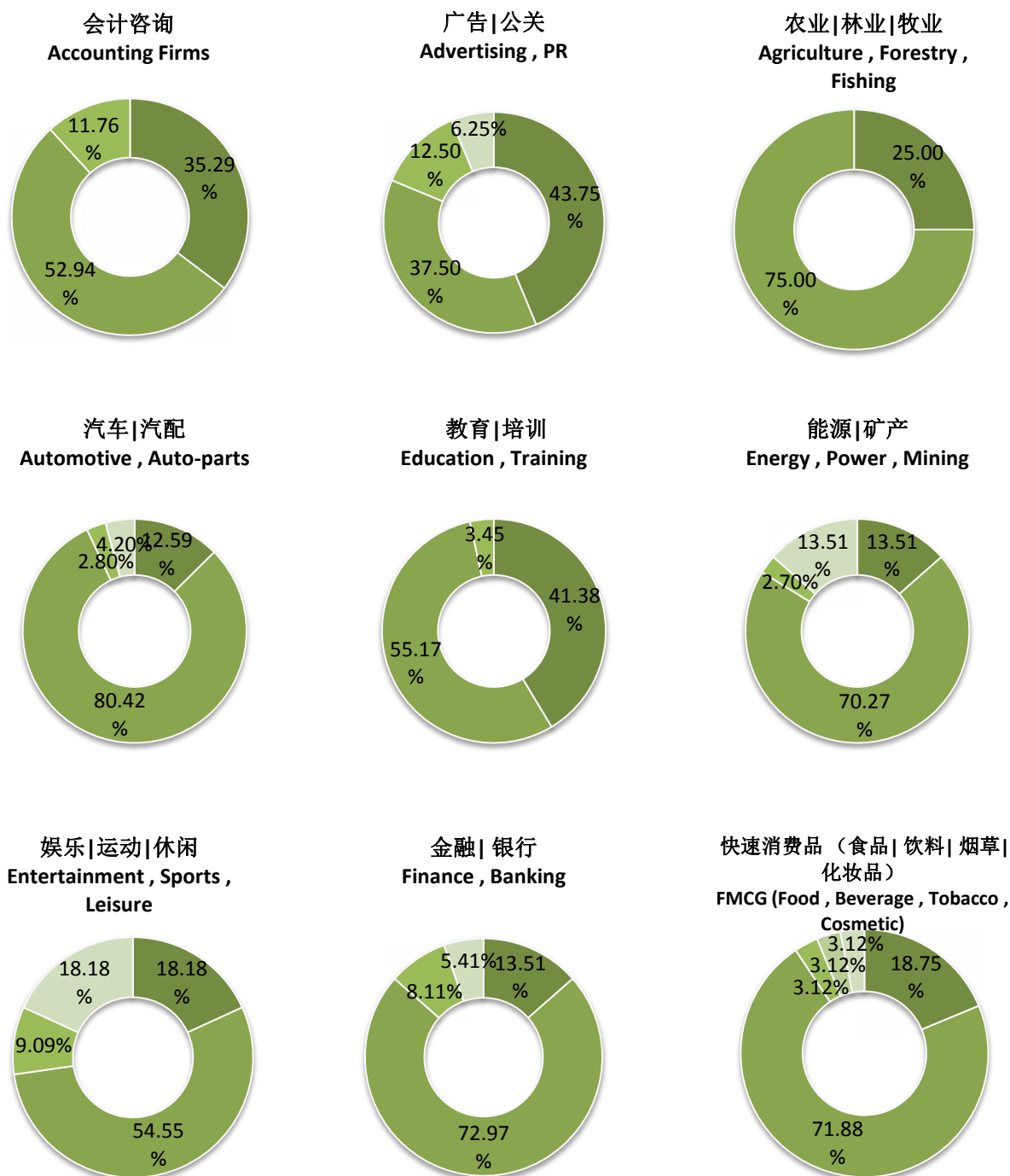
- 大部分是直接来自招聘公司 Mostly direct hiring
- 大部分是来自猎头 Mostly headhunters
- 不清楚 Not sure
- 一半一半 50%- 50%
- 其他 Others



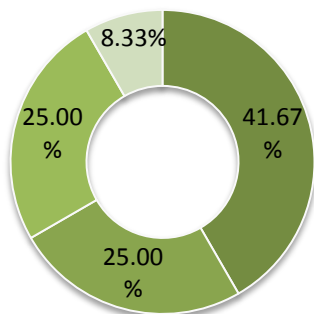
Industry Scanning 行业简述

图五十三 招聘电话来自哪里按行业分类 Figure 53 - the parties who give you hiring calls categories by industry

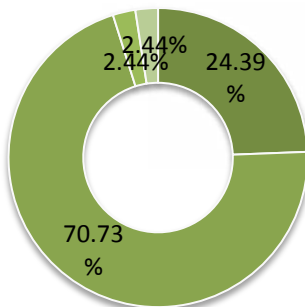
- 大部分是直接来自招聘公司 Mostly direct hiring
- 大部分是来自猎头 Mostly headhunters
- 不清楚 Not sure
- 一半一半 50% - 50%
- 其他 Others



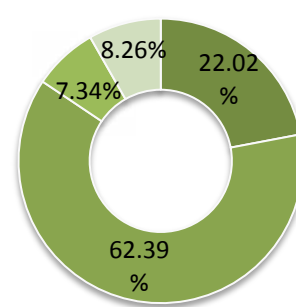
政府| 非赢利机构| 科研
Government non-profit organizations , Research



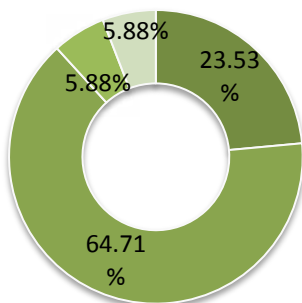
加工制造| 仪表设备
Instruments and Meters , Industrial Automation



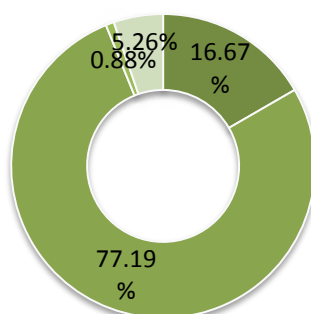
互联网| 通信| 电子
IT , Internet , Communications , Electronic



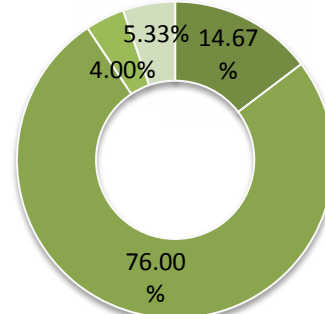
法律咨询
Legal Firm



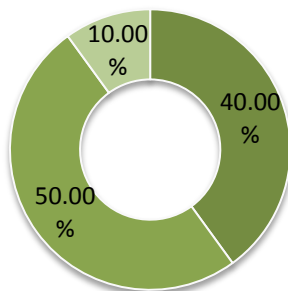
制造业 - 机械
Manufacturing - Machinery



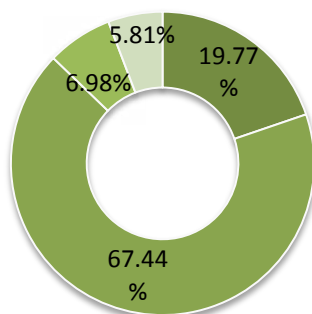
制造业 - 其他
Manufacturing - Others



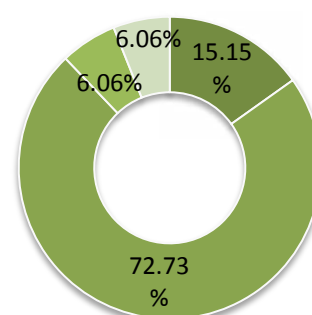
媒体| 印刷| 出版| 包装
Media , Publishing , Printing , Packaging



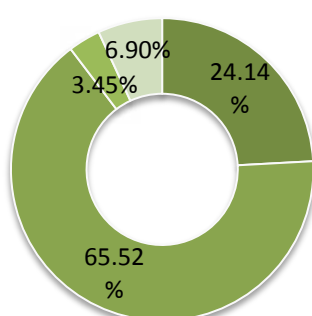
医药| 卫生
Pharmaceutical, Healthcare



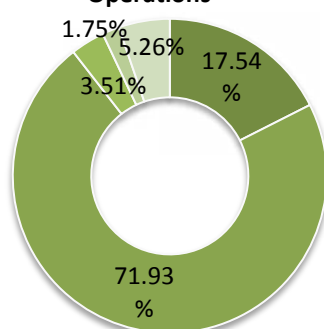
房地产| 建筑| 建设
Real Estate, Construction , Architecture



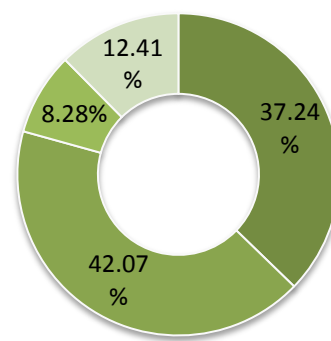
零售| 批发
Retail and Wholesale



交通| 物流| 运营
Transportation, Logistics, Operations



其他
Other Industries



Generally, comparing responses from companies calling you directly to calls from recruiters/head-hunters, which was the more professional approach?

通常情况下，直接从招聘方打来的电话和从猎头公司打来的电话，你认为哪种更专业？

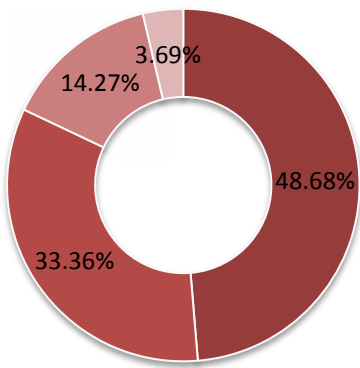
概况 Overview

本期有 48.68% 的人认为猎头的电话更专业，虽然比去年的 52.22% 下降了 4 个百分点，但仍然位居选项之首，说明猎头处在一个稳定的地位上。从企业角度看猎头专业程度，猎头顾问为企业选择人才，有自己的体系与方法，在通过层层筛选之后，将优质人才推到企业。从候选人的角度出发，猎头与候选人深度沟通交流，为其扬长避短提出解决方案，安排模拟面试，深得候选人的信赖。

48.68% of participants think calls from headhunters are more professional. Though the number has decreased by 4%, it still ranks in the first place. To some degree, it reflects the stable professionalism of headhunters. Companies appreciate the professionalism of headhunters: they are systematic and methodical and their rigorous screening produces the best people. From the candidates' angle, thorough communication, solutions which enhance advantages but avoid weaknesses, and mock interviews are key points which gain the trust of candidates.

图五十四 谁的招聘电话更专业 Figure 54 - Who's hiring phone is more professional

■ 猎头 Recruiters/head-hunters ■ 招聘方的人力资源部 Companies' HR direct
■ 公司直线经理 Companies' line manager ■ 其他 Other



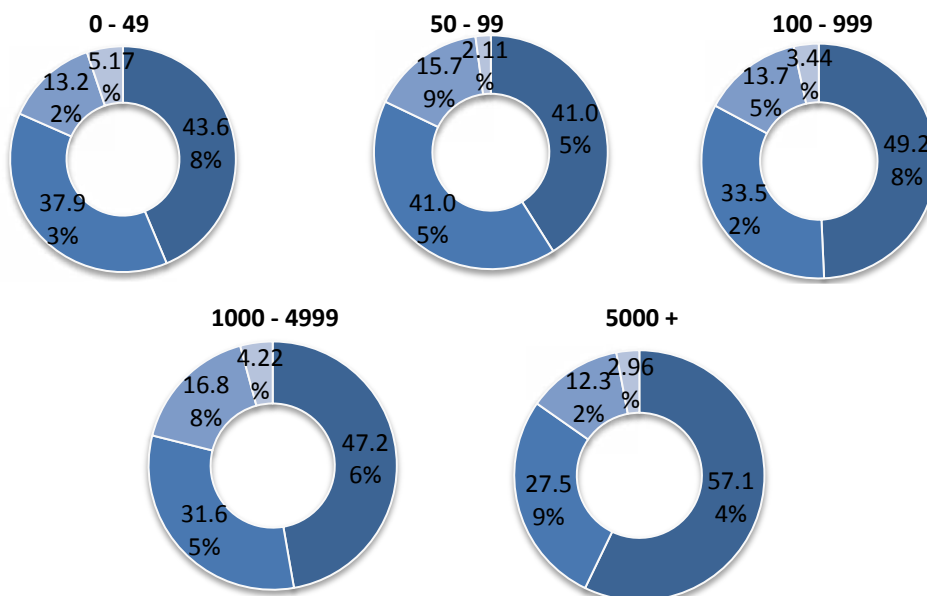
公司大小比较 Company Size Comparison

今年的数据与去年比，总体来说认为猎头更加专业的调查者基本都工作在 5000 人以上的大公司，占的比例高达 57.14%；另一方面，在 50-99 人的中小公司中有 41.05% 的被调查者认为公司招聘方比较专业。由此我们可以总结，大公司对人才需求量大、领域广，因此更需要像猎头公司为此提供专业专门的服务。但是小公司对人员的要求单一、量少，所以他们比较偏向于人力资源部门。

Generally speaking, data show that most people regard headhunters as more professional because they work with big enterprises. People working in small companies believe HR departments are more professional. We conclude that big companies require vast and diverse talents, so they prefer to work with headhunter companies. However, small companies need fewer people big companies, so HR departments will be suitable for them.

图五十五 谁的招聘电话更专业按公司大小分类 Figure 55 - More professional hiring calls categories by company size

■ 招聘方的人力资源部 Companies' HR direct ■ 公司直线经理 Companies' line manager ■ 猎头 Recruiters/head-hunters ■ 其他 Other



How many times per month, on average, did a recruiter/head-hunter contact you this year about a new position (repeated contact from one recruiter/head-hunter or one position is considered as once)?

平均每月猎头就一个新职位联系你多少次？（同一个猎头为同一个职位的多次联系视为一次）

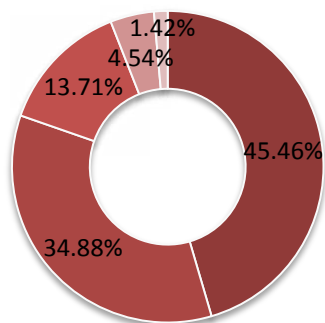
概况 Overview

与上期报告相比，从未被猎头接触过的调查者从 16.35%下降到了 13.71%，猎头的猎取范围进一步扩大。被猎头联系 1-5 次的比例与去年基本一致，联系 6 次以上的比例去去年增长了约 2%。猎头通过各种各样的方式接触到人选，互联网的发达让候选人的简历变得触手可及。此外，猎头的“关系”也发挥的淋漓尽致。

The percentage of respondents who have never been contacted by headhunters dropped from 16.35% (TFS report 2012) to 13.71% (2013), which shows that the impact of headhunters is increasing. The same proportion had 1-5 contacts from headhunters as in the previous TFS report, but the number contacted by headhunters more than 6 times has increased by 2%. Headhunters can reach candidates in different ways. The Internet has made candidates' CVs readily available.

图五十六 猎头平均每月联系次数 Figure 56 - Monthly times that headhunter contact you

■ 2-5 ■ 1 ■ 0 ■ 6-10 ■ 10 次以上 More than 10



教育背景比较 Education Comparison

猎头联系博士学历的候选人 2-5 次的比例从上期的 34%急剧下降到了本期报告中的 14.29%，46.43%的博士只有和猎头接触过一次，此现象再一次让人们反思高学历是否一定对工作具有积极作用。通过图表，被猎头联系次数为 0 在 MBA 人群中仅为 7.69%，该比例是所有学历中最低，充分证明猎头对 MBA 学历拥有者的青睐。

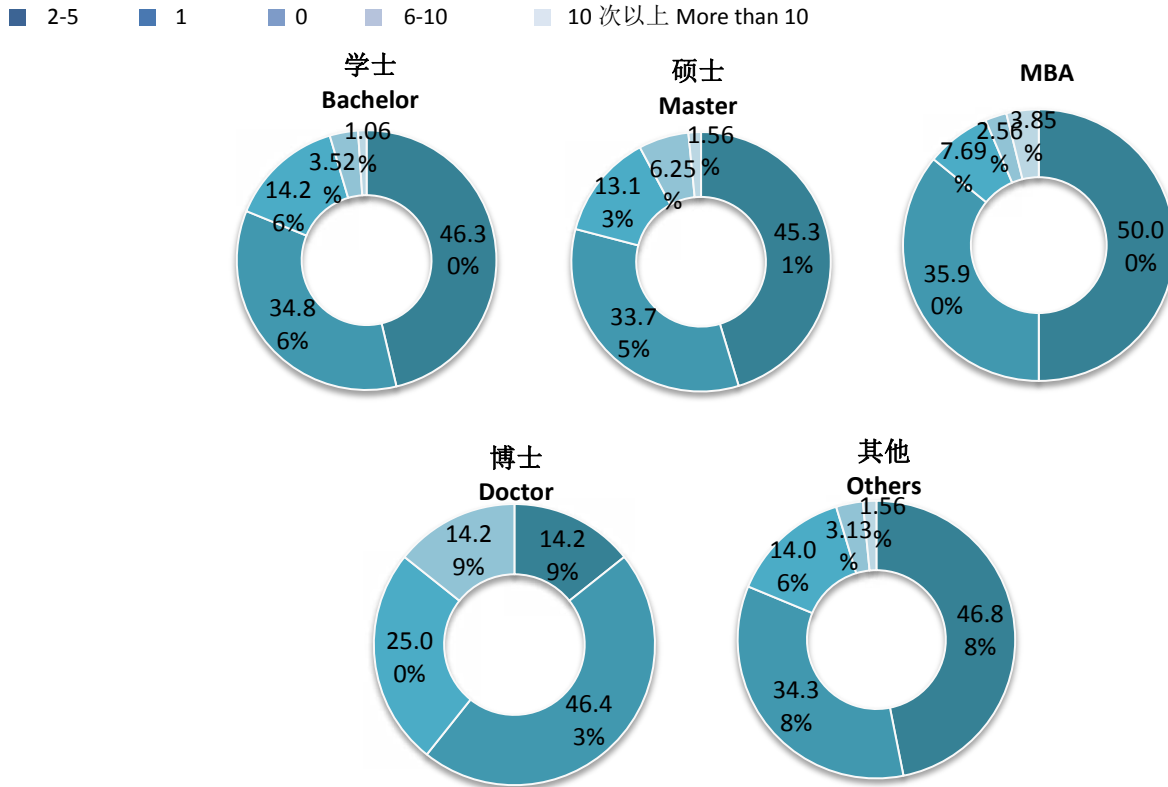
本科，硕士和 MBA 在被猎头联系 1-5 次的的数据上不相上下。今年本科和 MBA 学历的调查参与者被猎头接触 2-5 次的比例比去年有所上升。今年 700 万毕业生就业难的新闻轰动了很多，社会为大学生们担心是否能找到饭碗，而从猎头和今年企业寻找人才的情况来看，仅有 14.26%的本科生没有被猎头接触过，是学生们过于挑剔，还是人才市场没有足够的职位是一个值得思考的问题。

Analysis of the opportunities found by recruiters' shows that those with masters' degrees are more employable than bachelors. Among the employees contacted by recruiters on 2-5 occasions a month, masters have a 4% higher contact rate than bachelors. There has been polarization among employees with doctors' degree. On the one hand, 19% of employees with doctorates were contacted by recruiters more than 10 times every month, a much higher rate than holders of other degrees. On the other hand, 15% of employees with doctorates were never contacted by recruiters.

Headhunter contact is approximately at the same level as the last TFS report in terms of graduates below doctoral level. There is a small increase in headhunter contact (2-5 times) candidates holding bachelor and MBA degrees. The news that 7 million graduates facing difficulty securing employment has created quite a stir in public. However, from the perspective of headhunters and company recruitment departments, only 14.26% fresh graduates have not been approached by headhunters. Perhaps new graduates are too choosy or the market needs to consider employing graduates at a lower level.

图五十七 猎头平均每月联系次数按学历分类

Figure 57 -Monthly times that headhunter contact you categories by education background



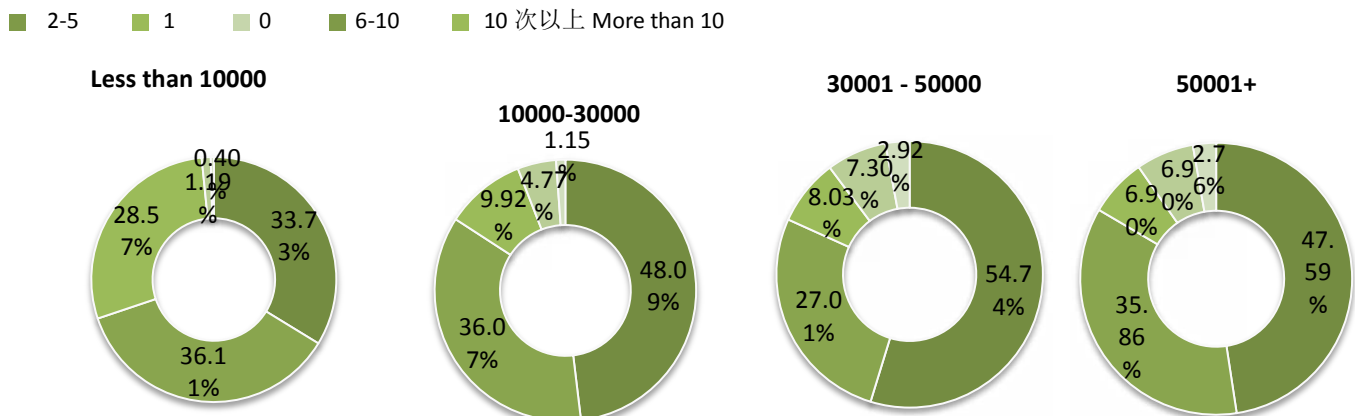
薪酬比较 Salary Comparison

月薪超过 30000 元的人才被猎头联系 2-5 次的比例达 54.75%，是四类薪酬范围中比例最高的，这类人才最得猎头青睐。月薪 10000 元以上的人才和猎头的联系都超过 80%，可见猎头在中高端人才市场的活跃程度很高。此外，月薪在 10000 元以下的人群中有 33.73% 的被调查者被猎头联系过 2-5 次，可见猎头市场有中高端职位和中低端职位的细分。

The category with the highest headhunter contact rate (2-5 times) is that with a wage of more than 30,000 RMB per month. 54.75% in this category were contacted. 80% of people earning more than 10,000RMB per month were contacted and this shows that headhunters are very active in mid and senior job market. Additionally, 33.73% of people whose monthly salaries are below 10,000RMB are contacted between 2 and 5 times.

图五八七 猎头平均每月联系次数按薪酬分类

Figure 58 - Monthly times that headhunter contact you categories by salary



Have you been successfully placed into a new job by a
recruiter/head-hunter in last 12 months?

12 个月内，你有成功被猎的经验吗？(通过猎头找到新工作)

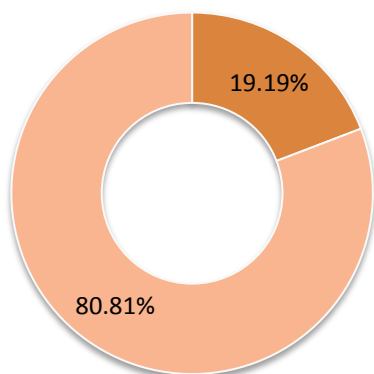
概况 Overview

罗迈国际资深顾问提到今年市场上各行业中高端职位需求量非常大，一方面可以看到市场的生机勃勃，另一方面

About 50% respondents were placed successfully by recruiters which shows that recruitment firms are the main way of hiring talented people.

图五十九 是否被猎过 Figure 59 - Placed by headhunter

- 是的 Yes
- 不是 No



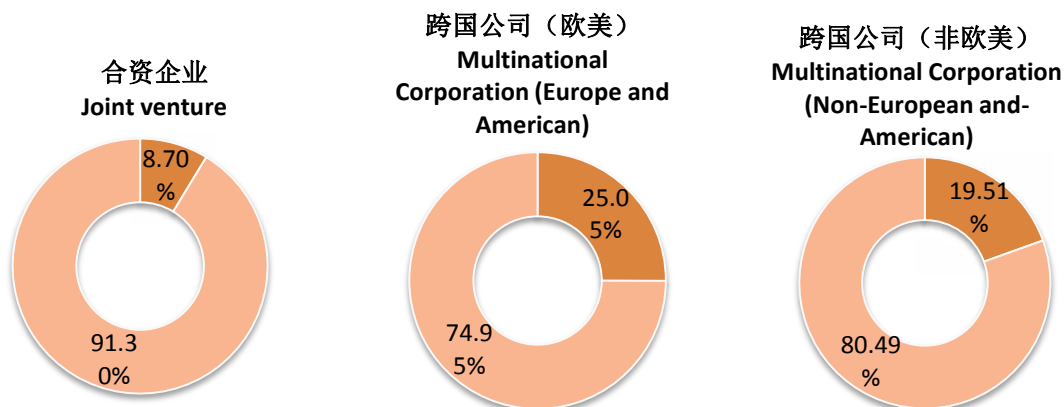
公司类型比较 Company Type Comparison

数据显示，欧美跨国公司和非政府机构费盈利机构成功被猎的比例以 25.05% 和 23.08% 位居前两名。而非政府机构人士在去年的调查中，成功被猎走的比例仅有 10%。可见 NGO 的经验为候选人的简历上可以被作为加分项。

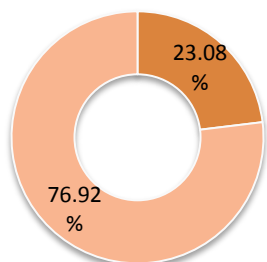
It can be seen from the 2013 data that MNC (Europe and America) and NGO/NPO hired 25.05% and 23.08% of their staff respectively by using headhunters. In the previous TFS report, only 10% of NGO/NPO hirings were successfully placed by headhunters.

图六十 “被猎”按公司类型分类 Figure 60 - Placed by headhunter categories by company type

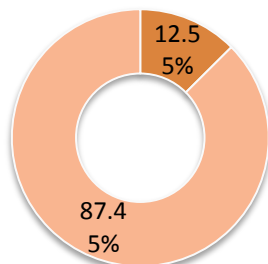
- 是的 Yes
- 不是 No



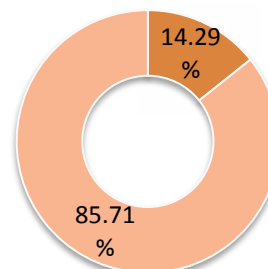
NGO/NPO (非政府/非营利机构)
NGO / NPO (non-governmental / non-profit organizations)



私有企业
Private Owned Company



国有企业
State-Owned Enterprise



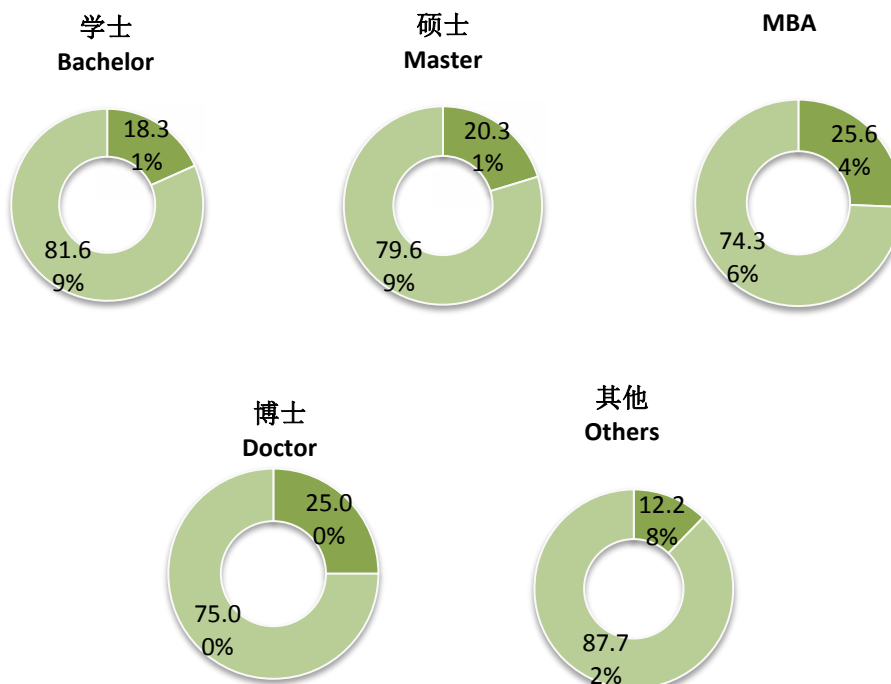
教育背景比较 Education Comparison

拥有 MBA 学位的调查参与者最受欢迎猎头青睐的，以 25.64%的比例位居第一名。值得一提的是，拥有博士学位的人才以 25%的比例紧追 MBA。鉴于今年教育行业人才的市场的增长，博士学位的人才也开始得到更多猎头的关注。但是在其他学历中，通常为本科以下学历，成功被猎的比例仅为 12.28%，可见本科学历背景为猎头选取人才的分水岭。

People with MBA degrees are the most popular prey of headhunters. In the past 12 months 25.64% were successfully placed. In the same period 25% of candidates with doctorates were placed and this shows that such candidates have started to get more attention from headhunters. However of those with qualifications below bachelors' degrees, only 12.28% were placed by headhunters. This demonstrates that the bachelor's degree is the starting point for interest from headhunters.

图六十一 “被猎”按教育背景分类 Figure 61 - Placed by headhunter categories by education background

■ 是的 Yes
■ 不是 No



总结

据 RMG 中国人才调查报告统计，2012 年有 32% 的被调查者跳槽成功，而 2013 年这个数据变成了 36%，尽管只有 4 个百分点的提升，但仍说明我们的人才市场处于非常活跃的状态。行业方面，今年媒体，公关，地产及农林行业的人才活跃成都非常高，比例均超过 50%。相比之下，机械制造业、加工制造业以及能源矿产业的人才市场则有些黯然失色，跳槽比例均不到 30%。此外，我们针对上期提到的热点轮换问题，发现了人才以城市分级的新特点。本次调查中以成都为代表的二线城市的人才活跃程度比去年增长了近 30%，一方面二三线城市经济发展为人才市场的流动提供了新方向，另一方面稳定的二线城市人才市场并没有出现，而是以热点轮换的形势出现，这也印证了在上期报告中罗迈国际 CEO & Founder 潘瑞宝（Robert Parkinson）对于 2013 年中国人才市场趋势走向的看法。

值得一提的是本期调查中新增的关于影响跳槽的三个主要因素问题。传统印象中，薪酬一直都是人们考虑的换工作的第一要素，这毕竟是人们为之工作的主要目的。虽然近几年很多机构、专家提出人们的观念变化，但本期调查显示薪酬仍然以高达 70% 的比例位居跳槽因素影响榜首。然而，值得注意的是，人才离开目前职位的原因却很少因为薪酬。据罗迈顾问的电话调查显示，90% 候选人的离职原因与企业管理风格和企业文化相关。故我们要承认薪酬的重要性，但也要注意到其他因素对员工保留的不可替代的作用。同时，调查发现两性职场需求趋同的走势，这也体现了男女社会地位平等性的改善。通过对比各个影响因素，发现男女间数据差异很小，可见新时代女性的自信心与领导力越来越强。

本期调查通过分析人才城市流动情况，发现 16% 的被调查者希望去二线城市发展。一些二线城市的快速发展对人才的吸引已经追赶上一线城市了。我们要两方面看待目前的人才流动形式。一方面，人才对于工作机会的选择在地域上更加广阔。另一方面，雇佣者对于优秀人才的竞争也会愈演愈烈。这点在国有企业中非常明显，同比上期数据国有企业使用猎头服务从 35% 快速上升到今年的 57.14%，这对于很少接触猎头的国有企业是一个不小的进程。调查还发现虽然有超过一半的被调查者希望通过猎头换工作，但在过去 12 个月内成功通过猎头换工作的人才仅占 20%。这说明，在愈加激烈的人才和工作竞争中，无论雇主还是求职者，与专业的猎头合作都会产生如虎添翼的作用。

今年中国就业市场的情况在各个行业各个地区与往年相比都有着起起伏伏，从政府政策，行业发展，人才意愿等多方面看，2014 年的中国特定行业的人才市场仍然会继续经历起伏期，这也印证了发展中经济体的特征。Robert 认为未来的中国人才市场将在多元化的基础上继续深入发展，只有实现中国人才资源配置才能真正发展经济。

Conclusion

According to China Talent Flow Survey conducted by RMG Selection, 32% of respondents successfully changed their jobs in 2012. The figure in 2013 increased to 36%. Although 4 percent is a not huge increase, it indicates the talent market in China is still very active. As for industry, people in media, public relations, real estate and agriculture are comparatively more active in job-changing. All of those job-changing percentages are over 50%. In contrast, the job-changing rate in machinery manufacturing, processing manufacturing and energy industry is much smaller. None reached 30% in 2013. Recruitment activity in second tier cities represented by Chengdu increased by nearly 30%. While economic development in second and third tier cities gives people more choices about work location, there is no stable recruitment market in second tier cities yet. This point also proves what Robert Parkinson, CEO & Founder of RMG Selection, predicted about the Chinese talent market trend in 2013.

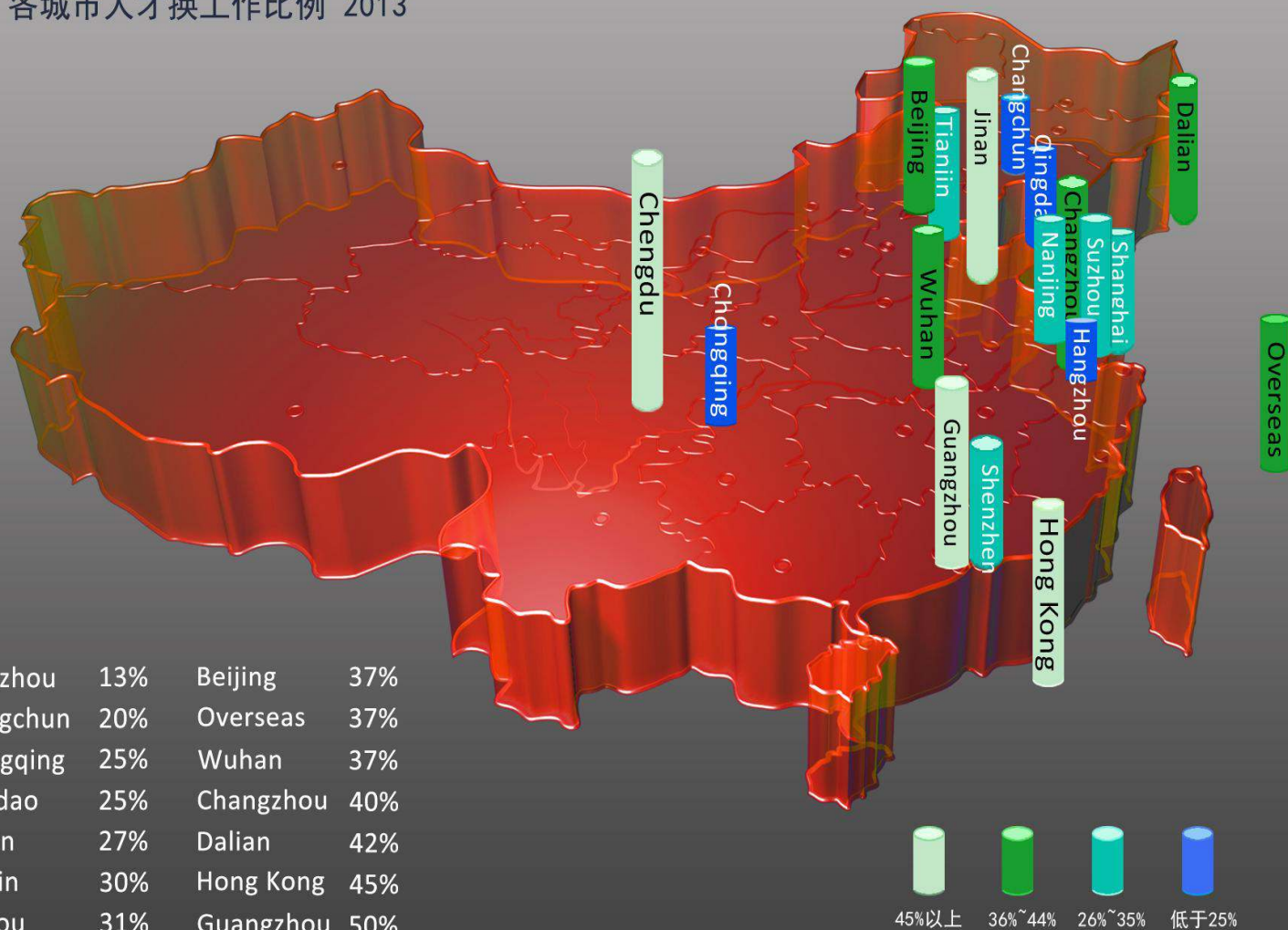
New in this report is a focus on the three major factors that influence thinking about job-changing. Traditionally, salary is the top factor that people take into consideration while changing jobs. For most, receiving a salary is the major point of working. However, according to several organizations and specialists, people have started to care about more than money in recent years. Though in this TFS report salary accounts for 70% among the factors in job-changing as the top factor on the list, few people resign because of salary. According to the telephone survey, 90% candidates choose to leave their companies because of the company management style and company culture. In this regard, besides the importance of salary, employers should also pay attention to other factors that are vital in employee retention. At the same time, the trends of career development needs are basically the same in male and female. Equality of both genders in social and workplace status has improved. By comparing data for each factor, we found that gender differences are very small. We can see that women will be the confident leaders in the near future.

Additionally, by analyzing the talent flow among different cities, we found that 16% of respondents hope to develop their career in second tier cities. The rapid development in some second tier cities has made them as attractive as many first tier cities. The geographical range of people's work ambitions has extended and competition for excellent people among employers will be fiercer and fiercer. In fact, this point is shown in State Owned Enterprises (SOE). The headhunter service using in SOE rose from 35% to 57.14% this year. This is big progress for companies which barely used headhunter services before. The 2013 Survey has shown that more than 50% of respondents hope to change jobs via headhunters. However, the fact is only 20% respondents were successfully placed during the past 12 months. Therefore, at a time of fierce competition, cooperation with professional headhunters will be helpful for both employers and job seekers.

Compare to 2012, the employment market in 2013 has fluctuated in different industries and regions. In certain industries these fluctuations in the job market will continue in 2014. Government policy, industrial development and talent choice will help this trend to persist. Robert believes that the Chinese talent market will be further developed as the economy becomes more diverse. Optimal development of the economy can best be ensured by sensitive and professional recruitment policies.

Changed Jobs Percentage 2013

各城市人才换工作比例 2013

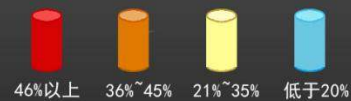


45%以上 36%~44% 26%~35% 低于25%

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Increase in Desire of Changing Jobs in 2013-2014

各城市人才换工作意愿 2013-2014



Changchun	10%	Jinan	29%
Dalian	10%	Beijing	32%
Suzhou	17%	Tianjin	37%
Shenzhen	19%	Wuhan	38%
Guangzhou	19%	Changzhou	40%
Shanghai	20%	Chongqing	42%
Qinagdao	21%	Xuzhou	50%
Hangzhou	27%	Overseas	55%
Nanjing	27%	Chengdu	60%

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关于调查者

罗迈国际商务咨询

罗迈国际是一家以中国为中心的国际招聘和人力资源咨询组织，专注于各行业各职能部门的中高端人才搜寻。我们专业于招聘销售，市场营销，会计，财务，法律，工程师，物流，运营，人力资源，技术和综合管理等职能领域的高学历人才。同时，我们也在以下行业具有丰富的实践经验：汽车，信息科技，医疗保健，医疗器械，医药和制造业等。此外，除了我们的主要业务人才管理与招聘外，我们还提供以下服务：人力资源咨询，薪资调研，心理测试，再就业辅导以及领导力训练课程。

罗迈国际及其合伙集团的顾问遍及全球 27 个国家的多个城市，我们在亚太地区的办公室设于北京、天津、上海、香港和新加坡，主要业务均以中国为中心的亚太地区快速展开，力争将国际化的服务理念与我们在中国市场多年的实际经验结合起来，提供专业职业的多元化人力资源服务。

我们在北京有 50 多名顾问，所有员工均为受过良好教育的全能型顾问，同时具有至少 5 年的来自不同行业不同职能部门的工作经验。我们的总体平均工作经验为 8 年，共有 10 种语言可被使用。罗迈国际坚持进行严格培训，2012 年开始，我们聘请了全职的培训总监来完善我们的专业培训制度，涵盖了招聘过程的每一阶段中的每一个细节。

截至今年，罗迈国际已经接受超过 300 多家来自国内外媒体的采访，包括：电视，电台，杂志，报纸和网站，例如中国中央电视台新闻频道，中国国际广播电台，中国日报，南华早报等。2012 年 12 月，罗迈国际获得 CCH 中国人才“年度最具潜力 HR 服务供应商”的奖项入围奖。2012 年 10 月，罗迈国际获得 Global Recruitment 亚太区“2013 年最佳招聘顾问奖”，以及最佳内部培训、最佳市场宣传、最佳招聘服务公司（小型）等最佳提名奖。

更多信息请点击罗迈国际官方网站 <http://www.rmgselection.com>，想了解更多罗迈新闻，请点击罗迈国际新闻网站：news.rmgselection.com。



About the Investigator

RMG SELECTION

RMG Selection is a China focused International recruitment and HR consultancy business focused on specialist selection of high performers in niche-disciplines. We specialize in the recruitment of university-educated professional candidates in the skill-areas of: Sales, Marketing, Accountancy, Finance, Law, Engineering, Logistics, Operations, Human Resources, Technology and General Management, we also have specific sector-focused practices including: automotive, IT, healthcare, medical devices, and pharmaceuticals and manufacturing. In addition to our main business of talent management and acquisition, we also offer the following services: HR Consulting, Salary Surveys, Psychometric testing, Outplacement, Leadership coaching.

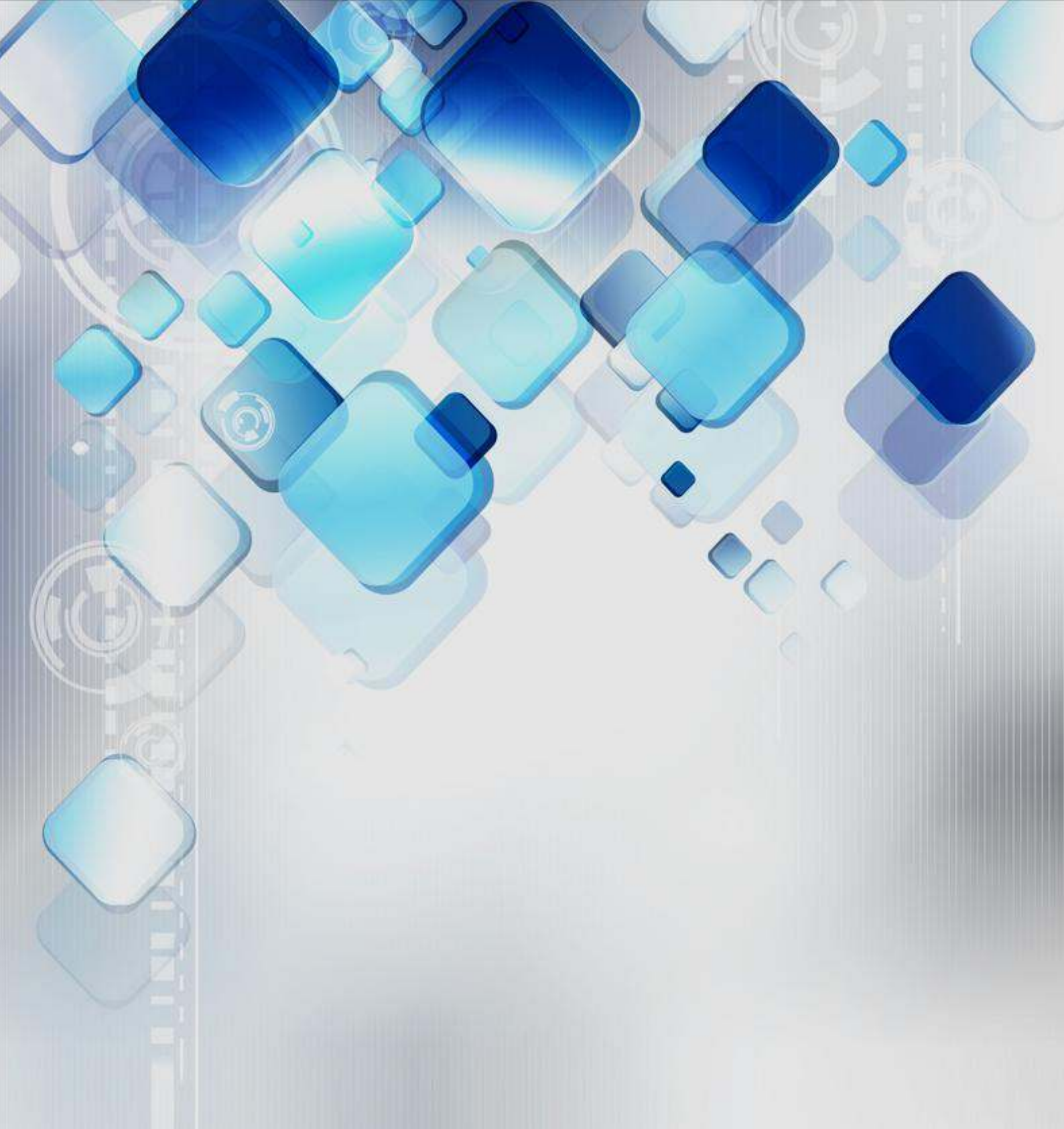
Including our Partner offices in Europe, Australia, the US, Africa and India we have a presence in over 27 countries around the world in addition to our Greater China presence which includes Beijing, Tianjin, Shanghai, Hong Kong, and Singapore. Our main business is quickly developing with mainland China Asia as central focus.

We have over 50 consultants in Beijing. All our staff are well-educated well-rounded professionals with at least 5 years post graduate experience from different skills-sets and business sectors. Our average level of working experience is 8 years and there are more than 10 languages spoken by our people. RMG takes training very seriously, and early in 2012 we employed a full-time training director to enhance our professional training system at each level and every stage of the recruitment process.

So far this year RMG Selection already has been quoted in more than 300 media organizations in China and abroad, including: TV, Radio, Magazine, Newspaper and Websites, such as CCTV-NEWS, CRI, China Daily, South China Morning Post...etc. 2012, RMG Selection was nominated as a finalist at China Staff Annual Awards for the Most Promising HR Service Providers of the Year 2013. in the Global Recruiter's Asia Pacific Industry Awards, RMG Selection owned the Best Recruitment Consultant, and Best in-house Training, Best Marketing Campaign, and was highly commended as Best Small Recruitment Business.

For more information about us please visit our company website <http://www.rmgselection.com>. For more RMG News, please visit: news.rmgselection.com





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