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Employer Branding

Perception being reality

Global Report

Overall findings



Results Randstad Award 2012

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study background and study design



Randstad Award 2012

Randstad Award based on perceived attractiveness of companies amongst a large audience

- attractiveness measured for 150 biggest employers in 14 countries (*)
- most attractive employer determined by means of the question: 'Would you like to work for this company?'
- employers evaluated on 10 various factors

National representative sample of potential employees

- representative on region, age, sex and education
- comprising current students, employed and unemployed workforce aged between 18 and 65 years

Interviews conducted online between October 2011 and February 2012

(*) participating countries in Europe:

Belgium: 12th edition

France, Germany, Spain & Netherlands: 3rd edition

Italy, Poland & UK: 2nd edition

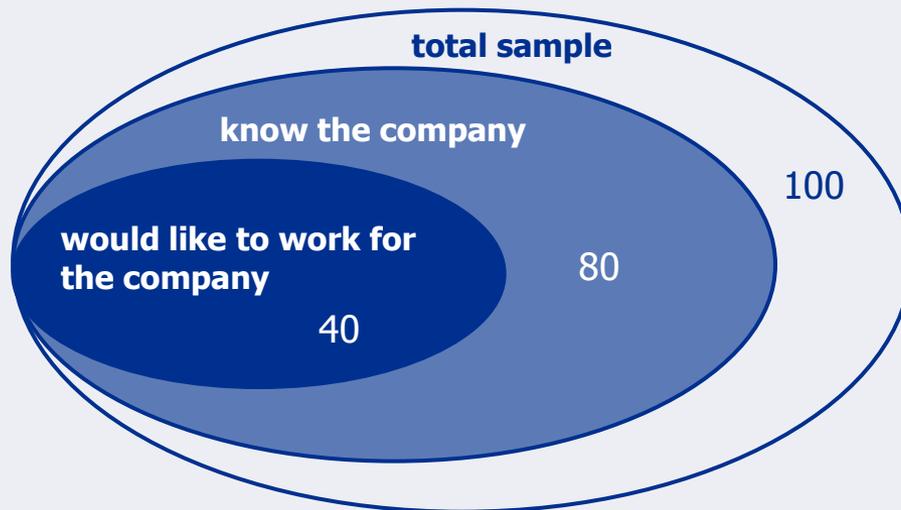
(*) participating countries in APAC & North America:

Australia, India, New Zealand: 2nd edition

Canada: 2nd edition

Singapore, Japan: 1st edition

absolute and relative attractiveness



- name awareness = 80%
- absolute attractiveness = $40/100 = 40\%$
- relative attractiveness = $40/80 = 50\%$

The difference between absolute and relative attractiveness lays in the calculation of the ratings:

Absolute attractiveness: % of respondents that would like to work for the company based on the number of the total sample

Relative attractiveness: % of respondents that would like to work for the company based on the number of people that know the company (removes the 'size' bias; big companies have the advantage to be known by most people and often rank amongst the top on absolute attractiveness)

questionnaire

1. Which aspects are important to you in choosing to work for a specific company?

top 5 ranked from most important aspect to least important

2. Do you know this company?

yes/no

3. Would you like to work for this company?



4. Association known companies with specific factors



some definitions

Name Awareness

- to know the company well enough to have an opinion/perception about the company

Absolute Attractiveness

- amongst all respondents (total sample); % that would like to work for the company

Relative Attractiveness

- = Randstad Award
- amongst respondents who know the company; % that would like to work for the company
- removes the 'size' bias
 - big companies having the advantage to be known by most people and as a consequence often rank amongst the top on absolute attractiveness

success of a company hinges on the quality and talent of its employees

Competitive Image
to attract right candidates

High retention
to ensure a stable work force

Improve cost management
to reduce costs for
search & selection



overall results

what are the most important factors when choosing an employer?



job security remains the most important factor for a fifth of potential employees; financial health gained importance compared to 2011

which is the most important factor to you in choosing to work for a specific company?

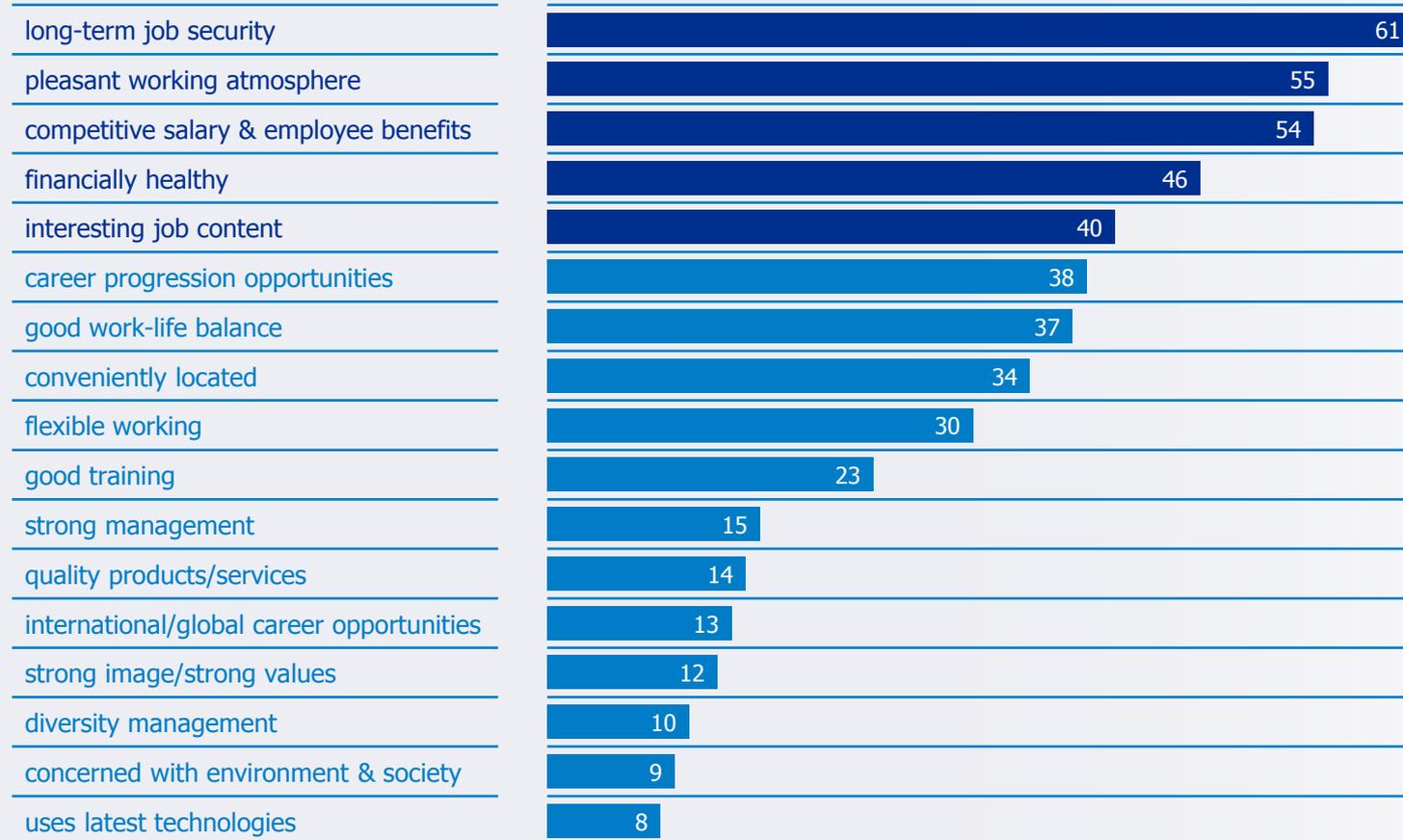
most important factor	Global	2011
long-term job security	20	19%
financially healthy	17	▲ 8%
competitive salary & employee benefits	13	13%
interesting job content	10	10%
pleasant working atmosphere	9	▼ 13%
good work-life balance	6	▼ 9%
career progression opportunities	5	▼ 8%
flexible working	4	NA
conveniently located	4	4%
good training	3	2%
strong management	2	1%
international/global career opportunities	2	2%
quality products/services	2	2%
strong image/strong values	1	2%
diversity management	1	NA
concerned with environment & society	1	2%
uses latest technologies	1	2%

within respondents' top 5 of most important factors, job security is most often selected followed by working atmosphere and salary

which are the top 5 most important factors to you in choosing to work for a specific company?

note: to be read as the % of respondents that selected the factor at any position in their top 5 of most important factors

top 5 most important factors



Global

top 5 most important factors according to men and women

which are the top 5 most important factors to you in choosing to work for a specific company?

note: to be read as the % of respondents that selected the factor at any position in their top 5 of most important factors

top 5 most important aspects	Global	Men	Women
long-term job security	61%	61%	61%
pleasant working atmosphere	55%	49%	60%
competitive salary & employee benefits	54%	54%	54%
financially healthy	46%	50%	42%
interesting job content	40%	40%	41%
career progression opportunities	38%	42%	35%
good work-life balance	37%	34%	40%
conveniently located	34%	29%	39%
flexible working	30%	25%	35%
offers good training	23%	25%	22%
strong management	15%	17%	13%
quality products/services	14%	15%	12%
international/global career opportunities	13%	16%	10%
strong image/strong values	12%	12%	11%
diversity management	10%	9%	10%
environment and society (CSR)	9%	9%	8%
latest technologies (innovative)	8%	11%	6%

 = score above global average

top 5 most important factors viewed by age groups

which are the top 5 most important factors to you in choosing to work for a specific company?

note: to be read as the % of respondents that selected the factor at any position in their top 5 of most important factors

top 5 most important aspects	Global	18 - 24 years	25 - 44 years	45 - 65 years
long-term job security	61%	57%	61%	64%
pleasant working atmosphere	55%	53%	55%	55%
competitive salary & employee benefits	54%	49%	56%	54%
financially healthy	46%	43%	44%	50%
interesting job content	40%	41%	38%	43%
career progression opportunities	38%	46%	41%	32%
good work-life balance	37%	33%	40%	36%
conveniently located	34%	31%	34%	35%
flexible working	30%	28%	30%	32%
offers good training	23%	31%	22%	20%
strong management	15%	15%	15%	16%
quality products/services	14%	12%	13%	15%
international/global career opportunities	13%	20%	14%	8%
strong image/strong values	12%	12%	11%	12%
diversity management	10%	10%	8%	11%
environment and society (CSR)	9%	10%	8%	9%
latest technologies (innovative)	8%	11%	8%	8%

 = score above global average

top 5 most important factors viewed by education levels

which are the top 5 most important factors to you in choosing to work for a specific company?

note: to be read as the % of respondents that selected the factor at any position in their top 5 of most important factors

top 5 most important aspects	Global	Primary & Secondary	Higher (Bachelor)	Higher (Master)
long-term job security	61%	64%	58%	58%
pleasant working atmosphere	55%	58%	55%	49%
competitive salary & employee benefits	54%	54%	56%	51%
financially healthy	46%	47%	44%	47%
interesting job content	40%	38%	38%	47%
career progression opportunities	38%	34%	42%	44%
good work-life balance	37%	36%	39%	37%
conveniently located	34%	37%	33%	29%
flexible working	30%	33%	28%	26%
offers good training	23%	23%	24%	23%
strong management	15%	14%	15%	18%
quality products/services	14%	14%	13%	13%
international/global career opportunities	13%	9%	15%	19%
strong image/strong values	12%	11%	12%	12%
diversity management	10%	11%	8%	8%
environment and society (CSR)	9%	8%	9%	9%
latest technologies (innovative)	8%	8%	10%	9%

 = score above global average

top 5 most important factors viewed by job levels

which are the top 5 most important factors to you in choosing to work for a specific company?

note: to be read as the % of respondents that selected the factor at any position in their top 5 of most important factors

top 5 most important aspects	Global	Production worker	Office worker	Board member - Manager
long-term job security	61%	65%	64%	58%
pleasant working atmosphere	55%	60%	56%	44%
competitive salary & employee benefits	54%	57%	57%	52%
financially healthy	46%	45%	45%	55%
interesting job content	40%	35%	41%	36%
career progression opportunities	38%	35%	39%	46%
good work-life balance	37%	37%	40%	33%
conveniently located	34%	39%	35%	26%
flexible working	30%	32%	31%	21%
offers good training	23%	22%	21%	24%
strong management	15%	13%	14%	25%
quality products/services	14%	14%	13%	15%
international/global career opportunities	13%	9%	10%	24%
strong image/strong values	12%	11%	11%	15%
diversity management	10%	9%	8%	7%
environment and society (CSR)	9%	8%	8%	9%
latest technologies (innovative)	8%	7%	8%	11%

 = score above global average

most important factors when looking for an employer

summary

Across countries, job security is the most important factor for a fifth of potential employees when looking for an employer. Overall, job security as well as salary & employee benefits remain equally important, whereas employers' financial health grew significantly more important since 2011. Note that Japan and Singapore are newcomers where specifically financial health is very important.

While job security and salary are equally important to men and women, atmosphere and balance are typically searched by women and the company's financial health is more of a concern among men. Men are also more attracted to strong, innovative companies that offer (global) career opportunities, high quality of products/services & good training, whereas women look more for conveniently located employers that offer flexible working arrangements.

Older people (aged 45-65) look more for job security and financial health, while salary and work-life balance are more important to younger respondents (aged 18-44) who are also more attracted to companies that offer future prospects, global career opportunities and good training.

most important factors when looking for an employer

summary (continued)

While people with a primary/secondary education degree assign higher importance to job security, those with a master degree look for financially healthy employers in the first place. The lower the education level, the higher the importance of salary, atmosphere and flexible working. The higher the education level, the higher the importance of job content and career prospects.

Non-managerial workers assign higher importance to job security, whereas managers look for financially healthy employers in the first place. Managers also look more for career prospects, strong management, international career opportunities, strong image & values and innovativeness. From a global perspective, it seems that office workers share the same basic needs as production workers, like job security, pleasant working atmosphere, flexible working conditions and good accessibility of the workplace. However, they assign significantly more importance to the job content and also look more for career prospects than production workers.

overall results

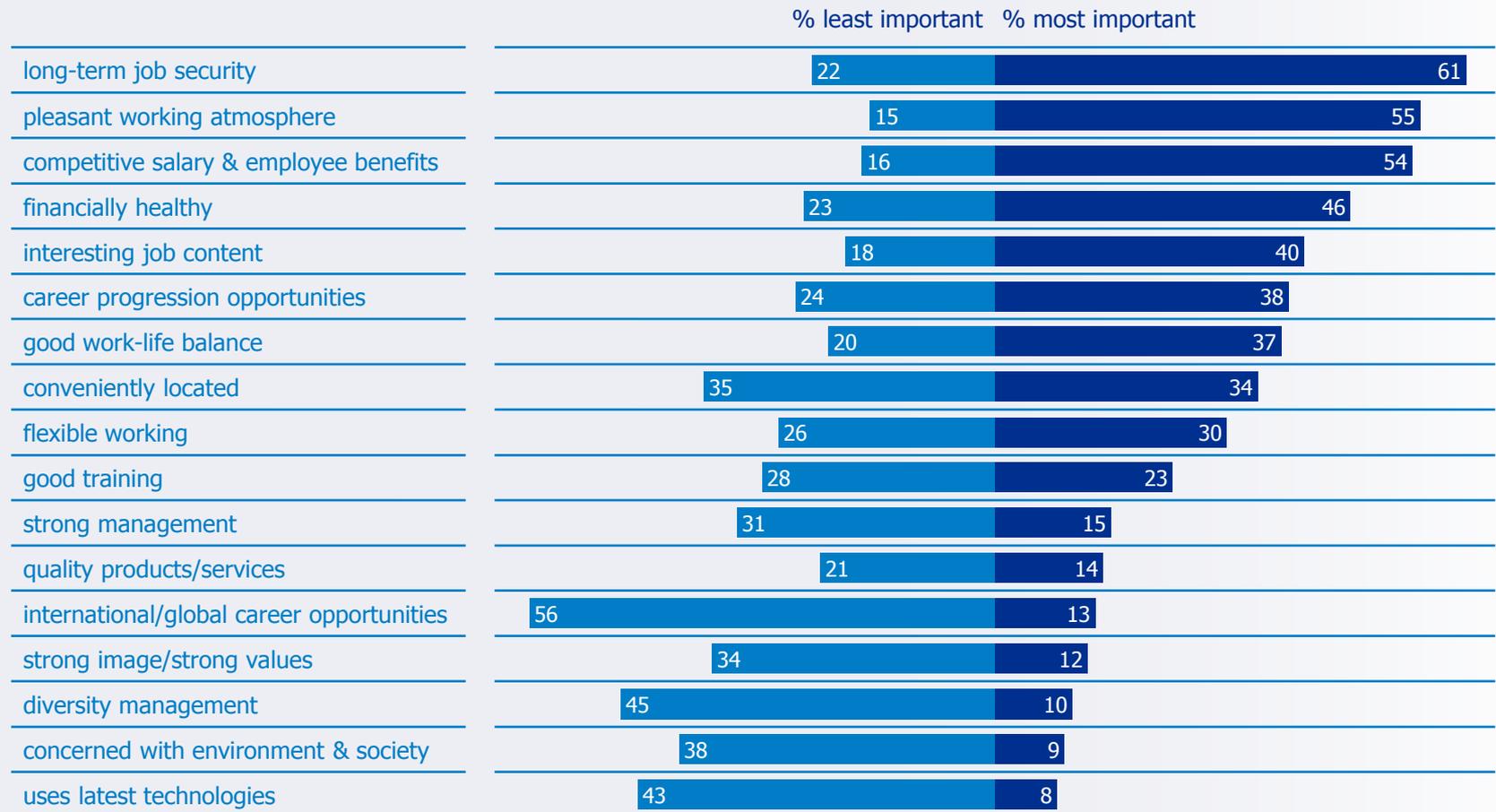
least important versus most important factors when choosing an employer



considering the least important factors, only few potential employees selected salary, atmosphere and job content

which are the top 5 least/most important factors to you in choosing to work for a specific company?

note: to be read as the % of respondents that selected the factor at any position in their top 5 of least/most important factors



overall results

recruiting



potential employees most often use job-boards to find a job; social media & networking events are more popular among men

which channels do you use to find a job? (total sample)

	% global	% above average	
		men	women
job-boards	62		4
adverts in newspaper/magazines	52		12
recruitment agencies	51		2
family & friends	22		3
social media (LinkedIn, Twitter, etc.)	18	22	
employers' websites	15		3
networking events	12	31	
spontaneous job applications	9		11

note: scores displayed point at the dominating group with above average rate against the group with below average rate (not displayed)

overall results

most attractive sectors



sector attractiveness

amongst respondents that know one or more companies operating in this sector

note: the sector ranking is based on respondents' perception of the companies that are included in the research

	would like to work for: (% 4-5)		
	2011	2012	
Automotive/Vehicles	36%	44%	▲
Informatics - Consulting	41%	44%	▲
FMCG	37%	40%	▲
Pharmaceutical/Chemical	40%	39%	
Services	35%	36%	
Utilities	35%	36%	
Non-profit	33%	36%	▲
Industrial/Manufacturing	37%	36%	
Finance (Banking & Insurance)	33%	34%	
Travel/Leisure/Horeca	32%	33%	
Construction	31%	32%	
Transport/Logistics/Wholesalers	32%	29%	▼
Retail	26%	28%	▲



overall results

most attractive companies



top 3 most relative attractive companies per country

relative attractiveness: amongst respondents who know the company (minimum 10% name awareness); % that would like to work for the company

	Award winner	1st runner up	2nd runner up
BELGIUM	DEME	GSK	Techspace Aero
FRANCE	Eurocopter	Airbus	EDF
GERMANY	Fraunhofer-Gesellschaft	EADS	BMW
ITALY	Ferrero	Ferrari	Thales Alenia Space Italia
NETHERLANDS	KLM	LUMC	Antonius Ziekenhuis
POLAND	TVN SA	PLL Lot SA	Mercedes-Benz Polska
SPAIN	Sony	EADS Casa	Coca-Cola
UNITED KINGDOM	John Lewis	Cadbury (**)	Marks & Spencer
AUSTRALIA	Newcrest Mining	ABC	Virgin Australia
INDIA	Google India (*)	Microsoft	Oracle
JAPAN	Sony Corporation	Oriental Land Co., Ltd.	Panasonic Corporation
NEW ZEALAND	Air New Zealand	TVNZ	New Zealand Customs Service
SINGAPORE	Singapore Airlines	ExxonMobil	Sony
CANADA	WestJet Airlines Ltd.	ArcelorMittal Inc.	Pratt & Whitney Canada International Inc.

(*) Google was reported as the winner in the survey results but Google has a policy not to accept awards from their vendors

(**) Cadbury is part of Kraft Foods

differences between countries

what are the most important factors when choosing an employer?



in Europe, job security obtains highest importance in Spain, UK & Belgium followed by Germany and Italy; competitive salary is top priority in France and Poland while atmosphere is the most important factor in the Netherlands

which is the most important factor to you in choosing to work for a specific company?

most important factor	GLOBAL	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	UK
long-term job security	20%	24%	16%	21%	21%	11%	17%	30%	27%
financially healthy	17%	19%	6%	13%	8%	6%	13%	20%	17%
competitive salary & benefits	13%	16%	20%	9%	10%	17%	19%	8%	11%
interesting job content	10%	12%	12%	5%	8%	8%	9%	7%	10%
pleasant working atmosphere	9%	8%	11%	13%	10%	22%	8%	4%	7%
good work-life balance	6%	6%	7%	9%	11%	9%	6%	4%	5%
career progression opportunities	5%	4%	6%	7%	6%	4%	6%	8%	4%
flexible working	4%	2%	4%	7%	4%	7%	4%	4%	4%
convenient location	4%	3%	6%	4%	4%	4%	4%	2%	5%
good training	3%	2%	1%	1%	3%	1%	2%	4%	4%
strong management	2%	1%	1%	2%	2%	1%	2%	1%	1%
global career opportunities	2%	1%	1%	1%	2%	1%	2%	2%	1%
quality products/services	2%	1%	2%	2%	4%	2%	2%	1%	1%

job security is the most important criterion in Australia and New Zealand, financial health is top priority in India and Singapore, while job content is the primary concern in Japan; in Canada, job security comes at first place

which is the most important factor to you in choosing to work for a specific company?

most important factor	GLOBAL	Australia	India	Japan	New Zealand	Singapore	Canada
long-term job security	20%	26%	15%	15%	19%	18%	22%
financially healthy	17%	19%	35%	21%	19%	27%	21%
competitive salary & benefits	13%	11%	8%	6%	12%	17%	17%
interesting job content	10%	8%	3%	31%	9%	5%	6%
pleasant working atmosphere	9%	9%	4%	9%	10%	6%	9%
good work-life balance	7%	4%	3%	3%	4%	3%	5%
career progression opportunities	6%	3%	8%	2%	4%	6%	3%
flexible working	5%	5%	1%	3%	5%	3%	4%
convenient location	4%	4%	2%	3%	3%	4%	3%
good training	2%	4%	7%	1%	6%	3%	4%
strong management	2%	2%	4%	3%	2%	2%	2%
global career opportunities	2%	1%	5%	1%	1%	2%	1%
quality products/services	2%	1%	1%	1%	1%	1%	1%

Spanish respondents look more for career prospects and Polish and Dutch most often select atmosphere in their top 5; flexible working is one of the top 5 criteria in Germany as accessibility is in the UK and in the Netherlands

which are the top 5 most important factors to you in choosing to work for a specific company?

top 5 most important factors	Global	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	UK
long-term job security	61%	71%	54%	63%	54%	51%	54%	68%	68%
pleasant working atmosphere	55%	58%	63%	62%	48%	74%	57%	46%	52%
competitive salary & benefits	54%	61%	71%	42%	46%	67%	56%	50%	54%
financially healthy	46%	47%	30%	52%	39%	34%	52%	41%	42%
interesting job content	40%	47%	42%	27%	36%	28%	46%	45%	48%
career progression opportunities	38%	37%	39%	42%	35%	30%	43%	57%	38%
good work-life balance	37%	42%	41%	44%	48%	46%	39%	35%	39%
conveniently located	34%	36%	40%	34%	34%	43%	32%	23%	43%
flexible working	30%	27%	32%	43%	26%	42%	24%	32%	30%
good training	23%	21%	16%	13%	24%	13%	20%	25%	28%

in their top 5, Japanese most often select job content, a top 5 item also in NZ; Singaporeans rank salary first; career ranks high in India and to a lesser extent in Singapore and Canada; accessibility is a greater concern in Australia

which are the top 5 most important factors to you in choosing to work for a specific company?

top 5 most important factors	Global	Australia	India (*)	Japan	New Zealand	Singapore	Canada
long-term job security	61%	66%	64%	58%	59%	61%	65%
pleasant working atmosphere	55%	57%	37%	60%	52%	49%	54%
competitive salary & benefits	54%	50%	41%	41%	54%	62%	61%
financially healthy	46%	41%	64%	59%	42%	55%	45%
interesting job content	40%	40%	25%	75%	40%	28%	34%
career progression opportunities	38%	34%	50%	20%	36%	43%	36%
good work-life balance	37%	32%	27%	30%	31%	32%	34%
conveniently located	34%	41%	20%	31%	31%	35%	34%
flexible working	30%	37%	12%	26%	32%	27%	32%
good training	23%	30%	34%	13%	35%	25%	28%

(*) 'international/global career opportunities' ranks at 5th position in India – very low scores in other countries and therefore not listed here

differences between countries

most attractive sectors by country based on the companies' attractiveness



when looking at the most attractive sectors for men and women, we generally find that men more often choose technical industries, while women prefer more service-oriented sectors

perception of respondents that know one or more companies operating in this sector

	men	women
Belgium	Pharmaceutical	Government
France	Aeronautics	Media
Germany	Automotive	IT Consulting
Italy	Electronics	Fashion & Luxury
Netherlands	Chemical	Healthcare
Poland	Electro-Technical	Pharmaceutical & Cosmetics
Spain	Electronics	Media
UK	Automotive - Aerospace	Education (Universities)
Australia	Mining & Natural Resources	Aviation
India	IT/Communication/Telecom/ITES	IT/Communication/Telecom/ITES
Japan	Food, Beverages, Fodder & Tobacco	Food, Beverages, Fodder & Tobacco
New Zealand	Media	Media
Singapore	Hospitality & Recreational Services	Hospitality & Recreational Services
Canada	Engineer/Construction	Transport & logistics

media and automotive sectors are particularly popular among people aged 18-24 in Europe; no prominent distinctions between age groups in APAC & Canada

perception of respondents that know one or more companies operating in this sector

	18 - 24 years	25 - 44 years	45 - 65 years
Belgium	Media	Pharmaceutical	Pharmaceutical
France	Aeronautics	Aeronautics	Aeronautics
Germany	Automotive	IT Consulting	IT Consulting
Italy	Electronics	Electronics	Electronics
Netherlands	Healthcare	Healthcare	Healthcare
Poland	Electro-Technical	Electro-Technical	Power
Spain	Media	Electronics	Electronics
UK	Automotive - Aerospace	Automotive - Aerospace	Education (Universities)
Australia	Professional services	Mining & Natural Resources	Mining & Natural Resources
India	IT/Communication/Telecom/ITES	IT/Communication/Telecom/ITES	IT/Communication/Telecom/ITES
Japan	Food/Beverages/Fodder/Tobacco	Food/Beverages/Fodder/Tobacco	Food/Beverages/Fodder/Tobacco
New Zealand	Media	Media	Media
Singapore	Hospitality & Recreational Services	Hospitality & Recreational Services	Hospitality & Recreational Services
Canada	Raw materials	Engineer/Construction	High tech manufacturing

pharmaceutical sector is more popular among higher educated people in Europe and Australia, whereas IT and Engineering are typically preferred by higher educated people in the rest of APAC and in Canada

perception of respondents that know one or more companies operating in this sector

	primary/secondary	higher (bachelor)	higher (master)
Belgium	Government	Pharmaceutical	Pharmaceutical
France	Aeronautics	Aeronautics	Aeronautics
Germany	Automotive	Automotive	IT Consulting
Italy	Electronics	Electronics	Fashion & Luxury
Netherlands	Healthcare	Healthcare	Healthcare
Poland	Electro-Technical	Power	Construction
Spain	Media	Electronics	Electronics
UK	Education (Universities)	Education (Universities)	Pharmaceutical
Australia	Mining & Natural Resources	Professional services	Pharmaceutical
India	FMCG/Durables/Retail	IT/Communication/Telecom/ITES	IT/Communication/Telecom/ITES
Japan	Food/Beverages/Fodder/Tobacco	/	Food/Beverages/Fodder/Tobacco
New Zealand	Media	Media	Education & Training Services
Singapore	Hospitality & Recreational Services	Hospitality & Recreational Services	Engineering, Construction, Energy
Canada	High tech manufacturing	Engineer/Construction	High tech manufacturing

Healthcare, Government, Manufacturing and Electro-technical industries are more popular among non-managers, whereas Life Sciences, IT and Hospitality are more often preferred by managers and office workers

perception of respondents that know one or more companies operating in this sector

	Production worker	Office worker	Board member / Manager
Belgium	Government	Government	Pharmaceutical
France	Aeronautics	Aeronautics	Aeronautics
Germany	Automotive	Automotive	Automotive
Italy	Electronics	Electronics	Electronics
Netherlands	Healthcare	Chemical	Chemical
Poland	Electro-Technical	Electro-Technical	Automotive
Spain	Media	Electronics	Electronics
UK	Education (Universities)	Education (Universities)	Education (Universities)
Australia	Mining & Natural Resources	Mining & Natural Resources	Pharmaceutical
India	Energy & infrastructure	IT/Communication/Telecom/ITES	IT/Communication/Telecom/ITES
Japan	Food/Beverages/Fodder/Tobacco	Food/Beverages/Fodder/Tobacco	Food/Beverages/Fodder/Tobacco
New Zealand	Transport & Logistics	Media	Media
Singapore	Manufacturing - Electronics	Hospitality & Recreational Services	Hospitality & Recreational Services
Canada	/	High tech manufacturing	Transport & logistics

good
to know
you

λοι
το κινω
δοοο

