

Randstad Employer Brand Research 2017 global report

Employer Brand Research 2017
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introduction



what is the Randstad Employer Brand Research?

The most representative and inclusive employer brand research in the world, capturing the opinion of the general public between 18 and 65

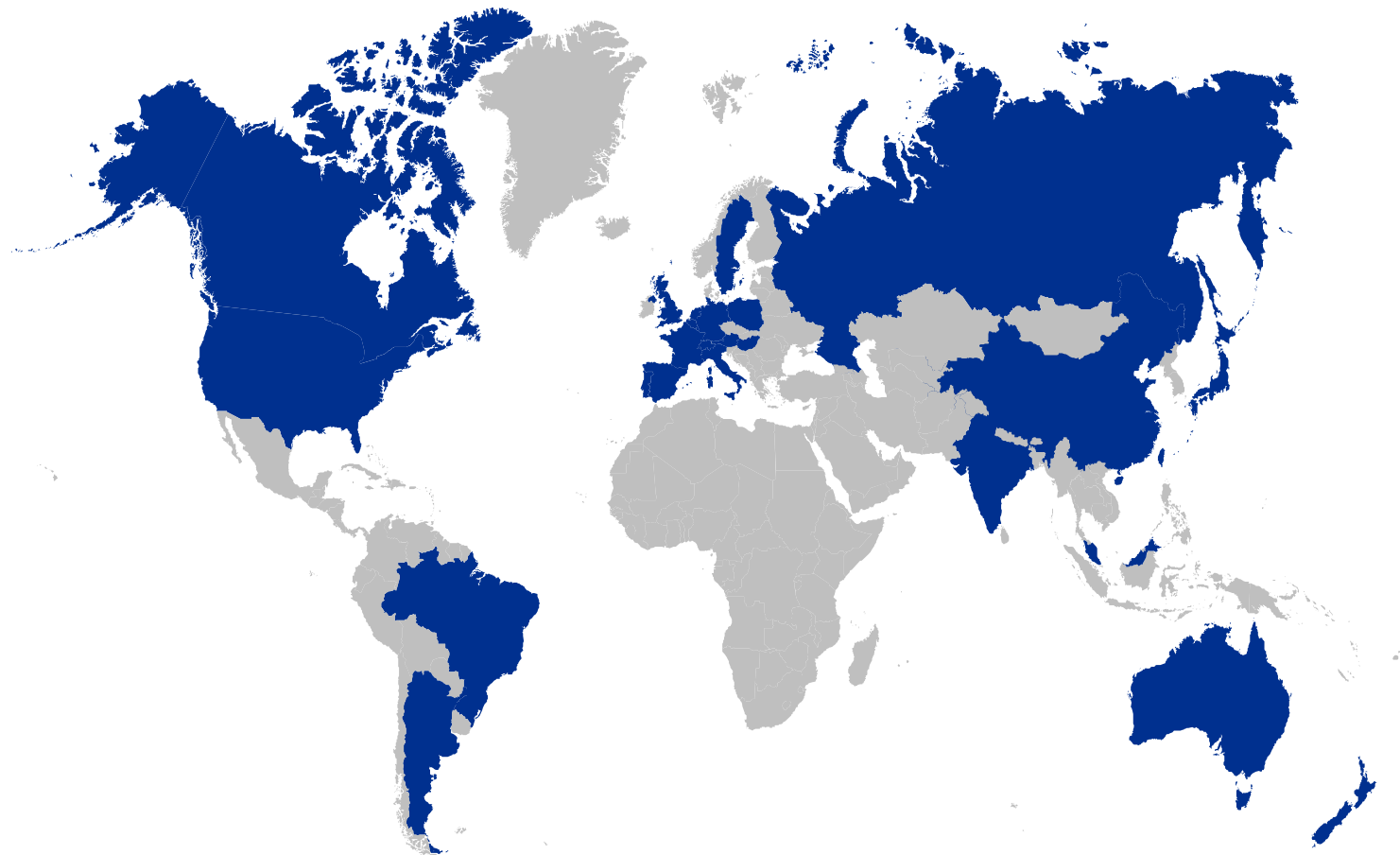
Founded in 2000 as the Randstad Award, moving forward in 2017 as the Randstad Employer Brand Research, optimizing 17 years of successful employer branding insights

Independently conducted research, giving a truly impartial view of the employee market and a reflection of employer attractiveness for each of the 26 participating countries' largest employers

Valuable insights to help companies shape their employer brand

Information on automation, retraining and sector switching included

26 countries surveyed covering 75% of the global economy



Australia Argentina Belgium Brazil Canada China France Germany Hong Kong
Hungary Italy India Japan Luxembourg Malaysia New Zealand Netherlands
Poland Portugal Russia Singapore Spain Sweden Switzerland UK USA

Worldwide:
Over 160,000 respondents
5,495 companies surveyed

Sample aged 18 to 65,
representative on gender
with an overrepresentation
on age group 25 – 44

Sample comprised of
students, employed and
unemployed workforce

Online interviews
conducted in November
and December 2016

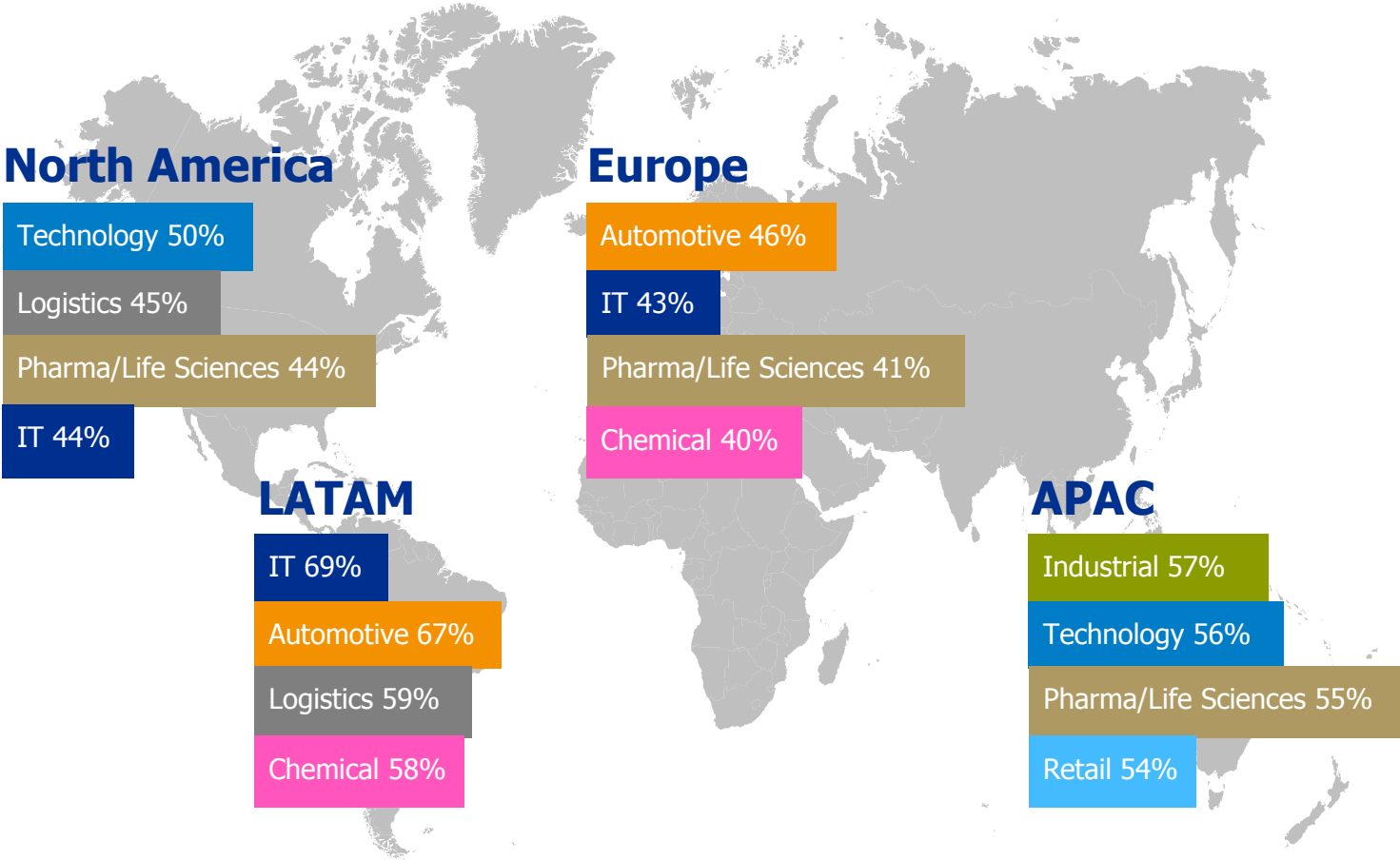
Length of interview:
16 minutes

global insights

How do key sectors compare in terms of attractiveness and where can improvement be made to change perceptions and increase appeal. And a spotlight on regional differences around specific attributes.

the ranking of sectors differs per region although Pharma/Life Sciences and IT both rank in top four in three of the four regions

most attractive sector to work in by region



4 most attractive sectors globally:

- Technology (51%)
- IT (50%)
- Pharma/Life Sciences (50%)
- Automotive (49%)

The sectors which appeal most differ per region although Pharma/Life Sciences and IT are ranked in the top four in three out of four regions.

The popular sectors in 2017 are equal to those in previous years apart from Technology which has risen in attractiveness and logistics now coming up in North America and APAC.

most attractive attributes sought in employers are not aligned with the perceived core values of the largest companies

most important attributes in potential employer (% agree)

1. **Attractive salary and benefits (58%)**
2. **Long-term job security (46%)**
3. **Good work-life balance (45%)**
4. Pleasant work atmosphere (43%)
5. Career progression opportunities (35%)
6. Financially healthy (33%)
7. Flexible working arrangements (31%)
8. Good training (28%)
9. Conveniently located (27%)
10. Strong management / leadership (26%)

core values attributed to largest companies (% agree)

1. Financially healthy (61%)
2. Uses latest technologies available (56%)
3. Good reputation (54%)
4. **Long-term job security (51%)**
5. Career progression opportunities (50%)
6. Work is stimulating & challenging (48%)
7. Pleasant work atmosphere (44%)
8. **Good work-life balance (41%)**
9. Cares for the environment / gives back to society (39%)
10. Will face challenges in the next decade (21%)

- The most attractive attributes in an employer are predictable – salary and job security – although not always easy to deliver.
- The importance of a good work-life balance and a pleasant atmosphere should not be overlooked in terms of attracting the best and most engaged employees. Company culture and the cues provided by leadership will play key roles in this:
 - Atmosphere is especially important to millennials - research by Accenture in the US in 2016 found that 64% of recent graduates would choose to work at an organization with an engaging, positive social atmosphere even if it meant accepting a lower salary.¹
 - Compared to last year's Global report we see that work-life balance has moved up from 4th to 3rd which is indicative of a trend we have seen across many regions with people becoming increasingly stressed as they try to 'have it all' – be active parents, have a good job and be healthy.
- In line with last year's report long-term job security remains in the number two spot highlighting the continued importance of making sure employees feel secure in their work life:
 - As economies continue to fluctuate due to events like Brexit and new trade agreements, it will be increasingly key for companies to make sure that potential new employees feel a decreased sense of risk moving to a new employer.
- When the core values of large companies are matched to the attractive attributes, this highlights some areas for improvement. Two areas are: creating a good work-life balance and fostering a pleasant work atmosphere.
- And although the majority of respondents feel that the largest companies use the latest technologies available, when it comes to the importance of a future employer having the latest tech, respondents don't even rank it within the top 10. This could be because employees expect their employers to have up-to-date technology and so it is a necessity and not an individual employee advantage that benefits them on a personal level.

most attractive attributes centre on making employees feel stable and secure while least attractive attributes involve taking risks

most important attributes in potential employer (% agree)

1. Attractive salary and benefits (58%)
2. Long-term job security (46%)
3. Good work-life balance (45%)
4. Pleasant work atmosphere (43%)
5. Career progression opportunities (35%)
6. Financially healthy (33%)
7. Flexible working arrangements (31%)
8. Good training (28%)
9. Conveniently located (27%)
10. Strong management / leadership (26%)

least important attributes in potential employer (% agree)

1. International career opportunities (55%)
2. Entrepreneurial way of working (46%)
3. Uses latest technologies available (42%)
4. Conveniently located (33%)
5. Promotes diversity and inclusion in the workplace (33%)
6. Cares for the environment / gives back to society (32%)
7. Flexible working arrangements (25%)
8. Good reputation (25%)
9. Work is stimulating & challenging (25%)
10. Offers quality products / services I value (24%)

- In this year's study, like last year, people rank salary and benefits, job security and a good work-life balance in the top five important attributes of a potential employer.
- This year we also asked respondents what were the least important attributes in a future employer. Those items which would involve taking risks were selected most often as unattractive
- Interestingly, the least attractive attribute - international career opportunities – is often presented as an advantage by employers. Over half of our respondents found this to be unimportant. This is probably because international opportunities involve financial outlay and upheaval – something not everyone is willing to undertake.
- While diversity and inclusion rank amongst the least attractive attributes, this is an important area that should not be overlooked. Companies should still promote a focus on diversity as it can make them more competitive within their business category.

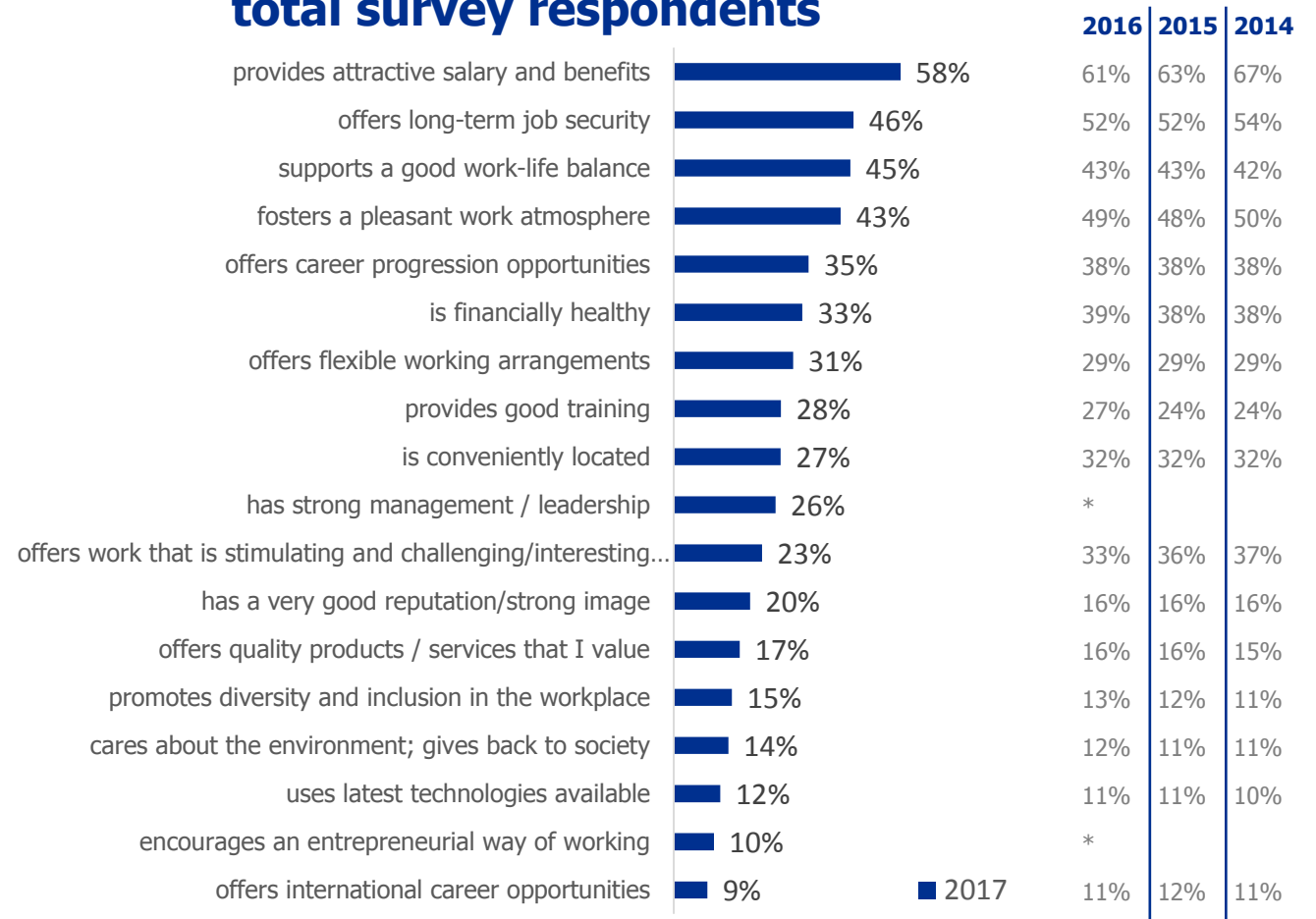
what do workers want?

How do employee motivations compare around the world with a spotlight on key actions companies could take to enhance their attractiveness in different regions.

employees seek reassurance when it comes to future job opportunities

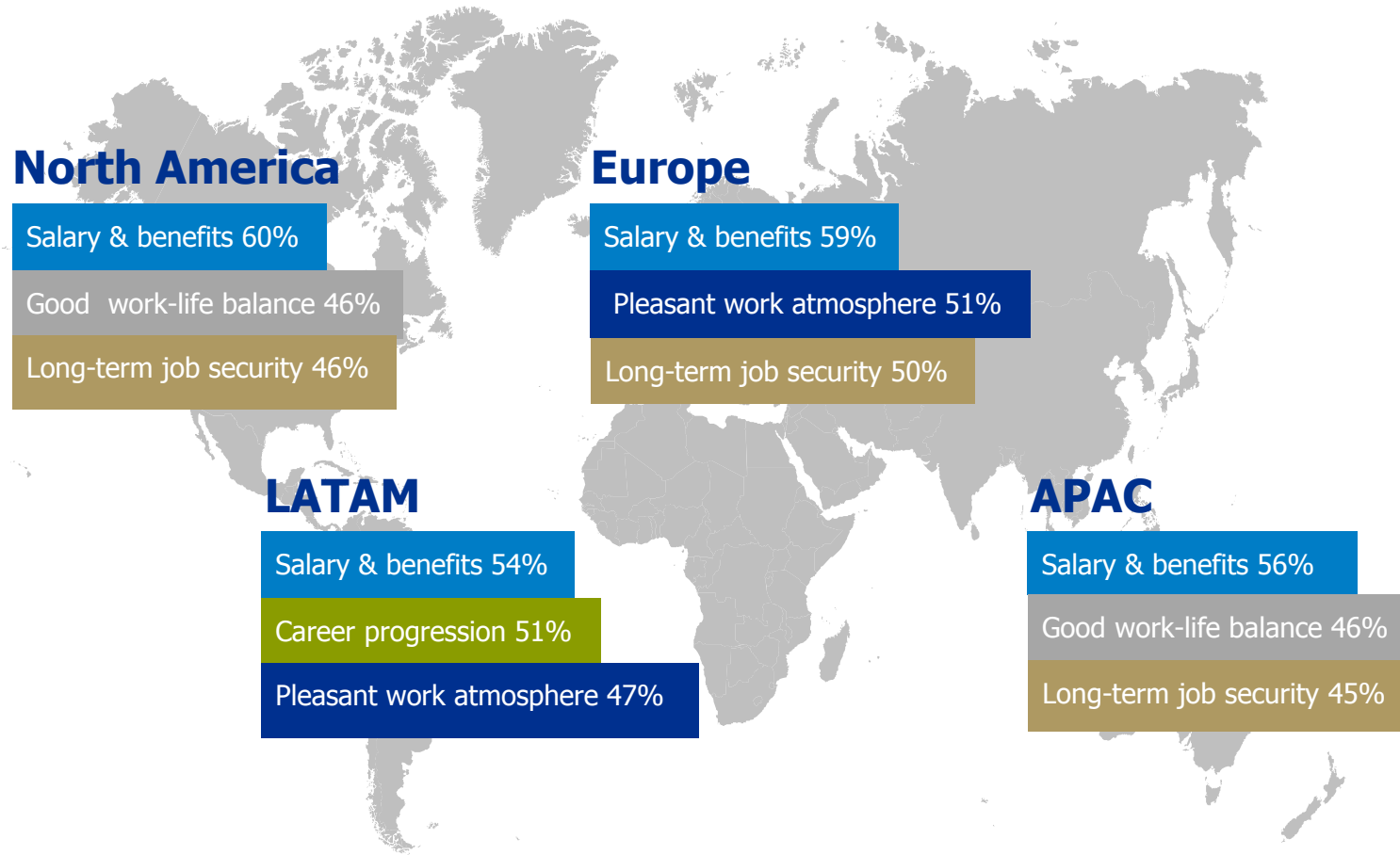
- Faced with a turbulent global economy and the coming threat of automation, employees are looking for security and reassurance to combat the uncertainty. As in 2016, a competitive salary and long-term job security top the list of attractiveness factors in an employer, but the number of people who are saying these factors are important has declined significantly since 2014 (almost 10%). They are perhaps becoming more necessities rather than merely attractive factors.
- Beyond this, workers seek a pleasing work atmosphere (#4) where they can thrive and progress their career (#5) although, again, levels of agreement have fallen since 2014.
- Modern workers say they have demanding lives. Workplace stress can be increased by more technology and greater expectations of availability both during normal working hours and afterwards. Employers can support their staff by delivering initiatives which encourage better work-life balance (#3) as well as being more flexible about when, where and how work is done (#7). This could include enforcing rules around not replying to emails after hours or a 'no mobile phones on holiday' policy.
- When looking at specific disruptor companies like Google we see a high level of attractiveness which could be due to the company's attempt to make working there more pleasant. Perks like free food, a well-designed office space and a free gym are appealing to many people as ways to save money and decrease stress.

total survey respondents



* New in 2017

while the top ranking of salary and benefits is consistent globally, 2nd and 3rd priorities differ by region



*Classification of regions is somewhat different from previous years: LATAM is now a separate region and Russia is now included in Europe. As a result, analysis of regional trends over time should be interpreted with care.

Globally, salary and benefits are the most important factor to employees – this holds true for every region. As economic turbulence persists, security in the form of a good salary remains a top priority for workers.

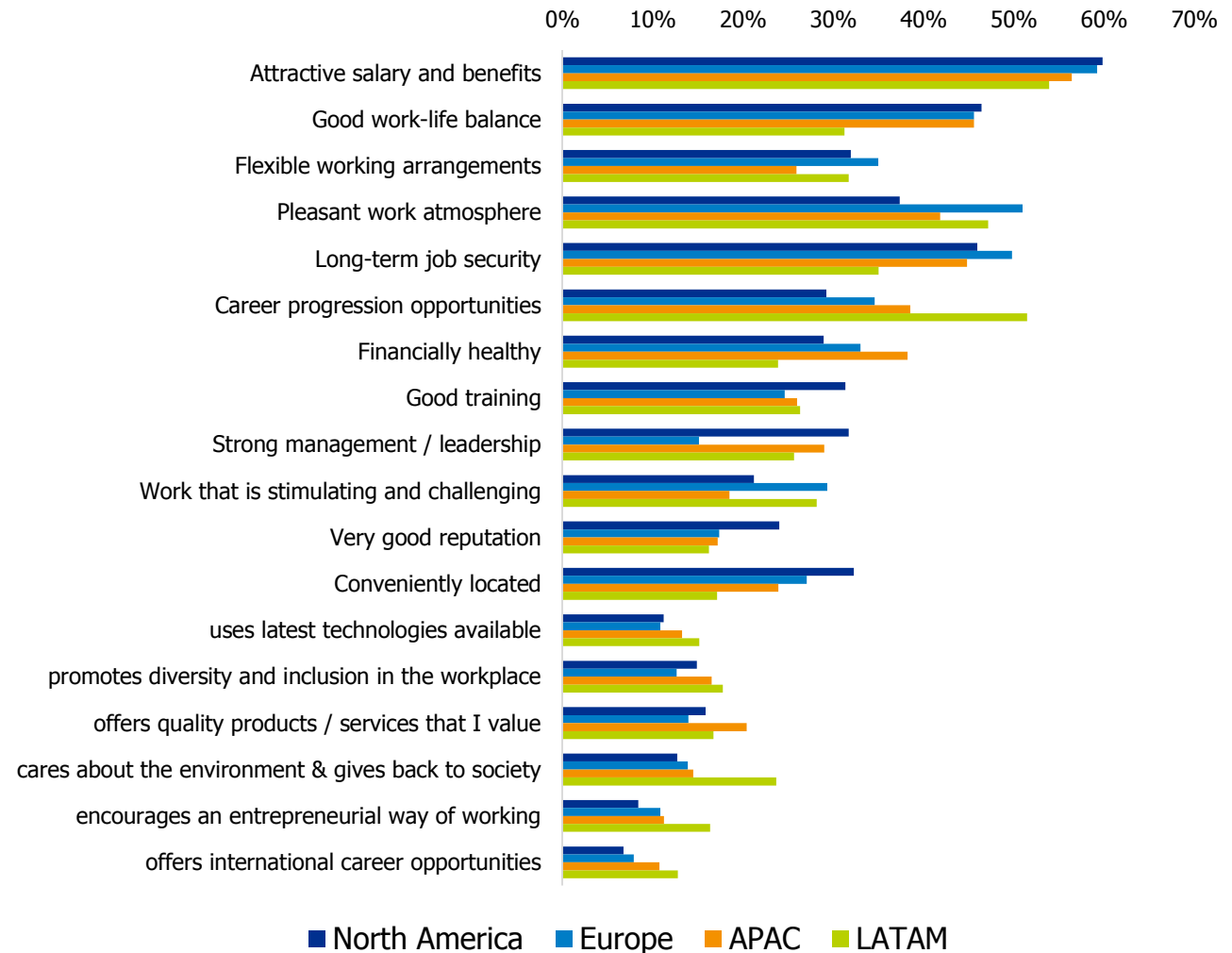
Consistent with our findings last year, a good work-life balance is very important in North America and APAC and it has increased in importance in both regions, moving from ranking 4th to 2nd this year. Europe and LATAM markets prioritise a pleasant work atmosphere which is also in line with last year.*

Long-term job security makes the top three in all markets with the exception of LATAM, where career progression has more influence. As with the focus on salary, job security as a top priority is linked to fears of another economic downturn. However it has decreased in importance for North America, moving from 2nd to 3rd in ranking due to a perceived strengthening of the US economy.

some markets show remarkable trends in perceived importance of EVP drivers

- To reiterate, salary and benefits is the most important factor across all regions.
- Good work-life balance is important for all regions and ranks highly for APAC, Europe and North America. Those in Italy and Australia rank it #1 while those in the USA, Canada, Spain, UK, New Zealand, Singapore, Hong Kong and Malaysia rank 'good work-life balance' as #2 while those in Germany, Russia, Brazil rank it #6.
- A good work-life balance has become more important, not just because of this driver itself gaining more weight but also because other drivers (like job security or career progression opportunities) have become less important over the past few years.
- Career progression stands out in LATAM: Both Brazilians and Argentinians rank it as 2nd in importance vs. those in the USA and Japan who rank career progression at #10.
- North Americans are more likely to be concerned by the length of their commute than their ability to progress within a company with 'conveniently located' placed #6 in their ranking of important factors vs. 'career progression' at #10.
- Though job security is one of the most important EVP drivers, we do see a long term (since 2014) decline of its importance in US, UK, France, Spain and Australia. This may have to do with the fact that some markets have witnessed some economic respite in the past years.
- Financial health of an employer is of medium importance in most markets. Russia however stands out as financial health has risen in importance in the past years and is now in fact the number 1 EVP driver there.

most important factors in a future employer by global region



salary and benefits are key across all age groups globally

- Across all age groups, an attractive salary and benefits is the most important factor in what makes an ideal employer. This was also ranked number 1 in 2016, proving to consistently be the most valuable factor.
- **Career progression opportunities are more important to 18-44 year olds than 45-65 year olds while long term job security is more important to the older age group**, placed at 2nd in the ranking. Older workers are more likely to be at the peak of their career so progression opportunities are limited or they may have settled at a comfortable level and they prefer to focus on other aspects of their work life e.g. stability.
- **While a pleasant work atmosphere is important for every age group, its particularly important for millennials** who rate it as the second most important factor, compared to a fourth place ranking by 25-44 year olds and a third place ranking by 45-65 year olds. This is because millennials place a lot of emphasis on company culture and seek out positive environments in which they can collaborate and progress.
- For 25-44 year olds, long-term job security has moved from second place in 2016 to third place in 2017 and work-life balance has moved up from fourth to second place. This is very similar to 18-24 year olds, where long-term job security moved down from third to fourth place in 2017, and work-life balance move from fifth to third place. This reflects how both groups are placing a greater importance on their personal lives and expecting their employers to recognise their desire for personal growth outside the workplace.

top priorities ranked by age group (global)

| age 18-24 | age 25-44 | age 45-65 | total |
|--|--|---|---|
| 1. Attractive salary and benefits (52%) | 1. Attractive salary and benefits (58%) | 1. Attractive salary and benefits (63%) | 1. Attractive salary and benefits (58%) |
| 2. Pleasant work atmosphere (43%) | 2. Good work-life balance (46%) | 2. Long-term job security (52%) | 2. Long-term job security (46%) |
| 3. Good work-life balance (41%) | 3. Long-term job security (46%) | 3. Pleasant work atmosphere (45%) | 3. Good work-life balance (45%) |
| 4. Long-term job security (38%) | 4. Pleasant work atmosphere (42%) | 4. Good work-life balance (45%) | 4. Pleasant work atmosphere (43%) |
| 5. Career progression opportunities (37%) | 5. Career progression opportunities (36%) | 5. Financially healthy (38%) | 5. Career progression opportunities (35%) |

attracting male and female talent - 1

- **Globally, women place more value on flexible working arrangements than men, placing it fifth in their ranking of priorities, whereas it comes in at ninth for men.** However, in LATAM men rank flexible working arrangements more highly than women (although women rank it 6th). In fact, research by Bain & Company and Chief Executive Women found that women with flexible working arrangements were more likely to succeed and achieve promotions. This was not the case for men who felt discouraged and judged with flexible work arrangements.² However, in LATAM men rank flexible working arrangements more highly than women (although women rank it 6th).
- **Financial health is more of a priority for men than women in both Europe and APAC.** This may be because the financial health of a company is very much related to long-term job security (which is ranked second for men in both regions). While job security is important for women in these regions, work-life balance and a pleasant work atmosphere is more of a priority.
- The prioritisation of work-life balance should come as no surprise as women often have to juggle their time between family and work.
 - A 2016 HSE report found that women were 1.4 times more likely to suffer from work-related stress, depression or anxiety than men, as a result of the pressures of familial responsibilities as well as workplace sexism.³
- The emphasis on a pleasant work atmosphere by women is also expected as discrimination and inequality is still prevalent in some companies.
 - More than half of female workers in the UK have experienced sexual harassment at work.⁴
- Companies should work towards having a gender-balanced, diverse workforce. They must also recognise that despite a few differences, men and women have very similar priorities in the workplace overall.
 - Increased workplace diversity contributes to competitive advantage, broadening the mix of knowledge and skills available.⁵

attracting male and female talent - 2

top priorities for men & women by region

North America

women

- Attractive salary and benefits
- **Good work-life balance**
- Long-term job security
- Pleasant work atmosphere
- **Flexible working arrangements**

men

- Attractive salary and benefits
- Long-term job security
- Good work-life balance
- Pleasant work atmosphere
- Strong management/leadership

Europe

women

- Attractive salary and benefits
- Pleasant work atmosphere
- Long-term job security
- **Good work-life balance**
- **Flexible working arrangements**

men

- Attractive salary and benefits
- Long-term job security
- Pleasant work atmosphere
- Good work-life balance
- **Financially healthy**

global

women

- Attractive salary and benefits
- Good work-life balance
- Pleasant work atmosphere
- Long-term job security
- **Flexible working arrangements**

men

- Attractive salary and benefits
- Long-term job security
- Good work-life balance
- Pleasant work atmosphere
- Career progression opportunities

LATAM

women

- Attractive salary and benefits
- Career progression opportunities
- Pleasant work atmosphere
- Long-term job security
- **Good work-life balance**

men

- Attractive salary and benefits
- Career progression opportunities
- Pleasant work atmosphere
- Long-term job security
- **Flexible working arrangements**

APAC

women

- Attractive salary and benefits
- **Good work-life balance**
- Pleasant work atmosphere
- Long-term job security
- Career progression opportunities

men

- Attractive salary and benefits
- Long-term job security
- Good work-life balance
- **Financially healthy**
- Career progression opportunities

age plays a greater role than gender in what people look for in a prospective employer

- **Gender doesn't play a defining role in what employees want** from potential employers on a global scale.
- **Age plays a much greater role in determining priorities** as those who are older, both male and female, prioritize long-term job security as much more important than our youngest cohort of 18-24 year olds who are more focused on career progression.
- The older cohort is also more concerned with a potential employer's financial health perhaps due to having lived through more turbulent economic times and having seen the effects personally.
- **While good work-life balance ranks highly across both genders and all ages, women, particularly those women aged 25-44, rank it higher.** This is probably due to this being the age at which women are leaving the workforce or re-entering it after having children:
 - According to the World Economic Forum's Global Gender Gap Report, women work 50 more minutes a day than men.⁶ While this does include work women do within the home as well as caring for ageing relatives or children, more time away from a traditional job could help alleviate the pressure they feel to accomplish everything.

top 5 priorities ranked global

| | | |
|--|--|--|
| 18-24 year olds <ul style="list-style-type: none"> • Attractive salary and benefits • Pleasant work atmosphere • Good work-life balance • Long-term job security • Career progression opportunities | men 18-24 year olds <ul style="list-style-type: none"> • Attractive salary and benefits • Good work-life balance • Career progression opportunities • Pleasant work atmosphere • Long-term job security | women 18-24 year olds <ul style="list-style-type: none"> • Attractive salary and benefits • Pleasant work atmosphere • Good work-life balance • Long-term job security • Career progression opportunities |
| 25-44 year olds <ul style="list-style-type: none"> • Attractive salary and benefits • Good work-life balance • Long-term job security • Pleasant work atmosphere • Career progression opportunities | men 25-44 year olds <ul style="list-style-type: none"> • Attractive salary and benefits • Long-term job security • Good work-life balance • Pleasant work atmosphere • Career progression opportunities | women 25-44 year olds <ul style="list-style-type: none"> • Attractive salary and benefits • Good work-life balance • Long-term job security • Pleasant work atmosphere • Flexible working arrangements |
| 45-65 year olds <ul style="list-style-type: none"> • Attractive salary and benefits • Long-term job security • Pleasant work atmosphere • Good work-life balance • Financially healthy | men 45-65 year olds <ul style="list-style-type: none"> • Attractive salary and benefits • Long-term job security • Good work-life balance • Pleasant work atmosphere • Financially healthy | women 45-65 year olds <ul style="list-style-type: none"> • Attractive salary and benefits • Long-term job security • Pleasant work atmosphere • Good work-life balance • Financially healthy |

to attract the best talent from the millennial pool, companies should focus on career progression opportunities and training

- **Employees of all ages are now likely to change employers more frequently than in the past. This is particularly true of millennials due to the prevailing belief that the only way to progress a career is to move companies.** However changing companies can lead to increased feelings of stress and upheaval so opportunities to move up within an organization are welcome.
 - For millennials a good work-life balance has gone up in the ranking from 5th to 3rd in 2017. Millennials want to have it all, both in and out of work, so a good work-life balance is key to their job satisfaction.
- When taking into account education levels of those 18-24, those with the highest level of education in this age bracket consider career progression opportunities to be the 2nd most important attribute of a future employer while those with less education deem long-term job security to be more important. This difference in opinion could be due to the fact that those with higher levels of education feel that due to their education they will be more desirable for new job opportunities.
- 18-24 year olds with the lowest level of education value good training opportunities. With less formal schooling on the job training is a must for this group.
- When looking at individual countries more young Brazilians think career progression is important than in any other country (54%) while only around a quarter of Japanese youth agree. Good training is key for those 18-24 year olds in New Zealand and Australia but less so for those in Hungary and Sweden.

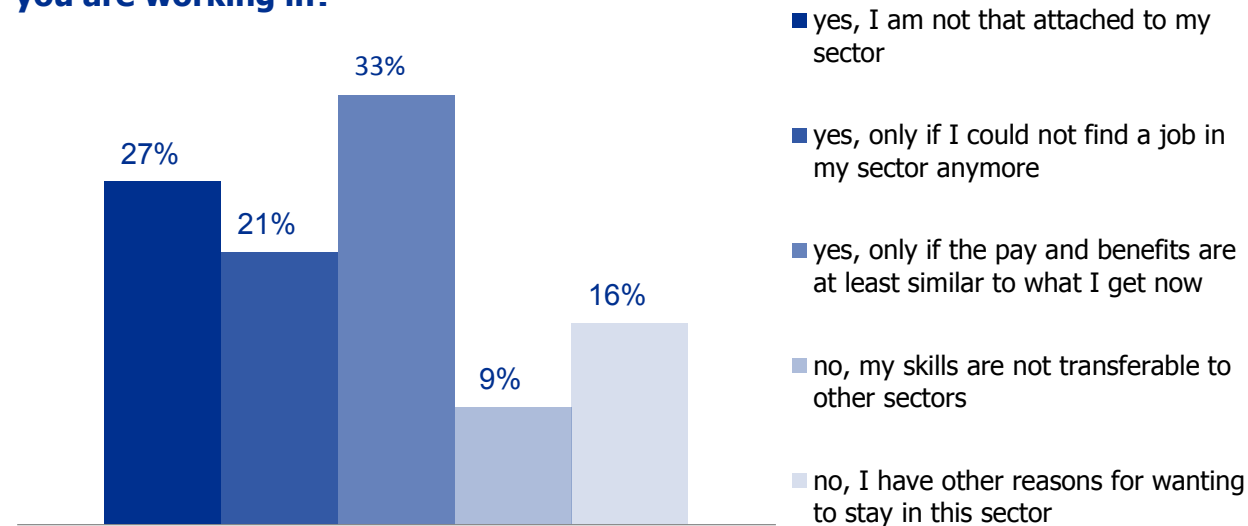
2017 vs 2016 top priorities ranked by region and global for 18 – 24 year olds

| 2017 global age 18-24 | Europe age 18-24 | North America age 18-24 | LATAM age 18-24 | APAC age 18-24 | 2016 global age 18-24 |
|----------------------------------|----------------------------------|--------------------------------------|---|----------------------------------|----------------------------------|
| Attractive salary and benefits | Attractive salary and benefits | Attractive salary and benefits | Career progression opportunities | Attractive salary and benefits | Attractive salary and benefits |
| Pleasant work atmosphere | Pleasant work atmosphere | Good work-life balance | Attractive salary and benefits | Pleasant work atmosphere | Pleasant work atmosphere |
| Good work-life balance | Long-term job security | Pleasant work atmosphere | Pleasant work atmosphere | Career progression opportunities | Long-term job security |
| Long-term job security | Career progression opportunities | Provides good training | Long-term job security | Good work-life balance | Career progression opportunities |
| Career progression opportunities | Good work-life balance | Strong management/ leadership | Flexible working arrangements | Long-term job security | Good work-life balance |

people are not committed to working in one sector for their whole career

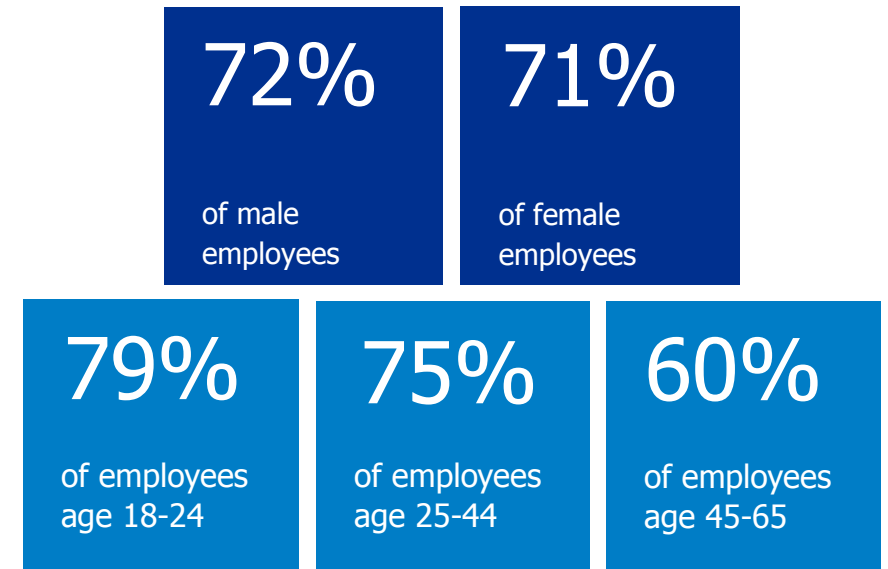
- 55% of US employees and 76% of US millennials expect to change careers, not just jobs at some point.⁷
- Still in the US, while 74% of all workers are happy with their jobs, 66% of them are still open to new employment.⁸
- **72%** of all employees surveyed are willing to switch sector for one reason or another. For example, 27% of all employees only being willing to switch because they aren't attached to the sector.
 - Willingness to switch increases to 79% for younger employees (18-24)
 - However, willingness to switch decreases with lower levels of education; those with the lowest levels of qualification are least likely to say they would switch sectors (only 68% vs. 73% of those with the highest level of education)
 - Looking at different countries, we can see that Indians (81%) and Spaniards (81%) are most willing to switch sector versus only 53% of employees in Luxembourg. The variety of job sectors available in each of these countries could play a role in whether people are willing to move between sectors

would you consider changing the sector you are working in?*



* More than one answer could be given in this question, but one could not say 'yes' and 'no'
 ** deduped answer: all that gave one of the 'yes' answers

willingness to switch sectors**



how attractive is your sector?

How attractive is each sector on both a regional level and around the world with a spotlight on key year over year trends.



technology sector has overtaken IT in being most attractive sector*

- The technology sector has become slightly more attractive than the IT sector, albeit by just 1%. After a few years of growth, IT has now lost points in attractiveness.
- We see various sectors changing position in the ranking over the past years: the technology sector ranked 5th in 2016, but second in 2015 and third in 2014. The ranking is thus somewhat volatile as we see other sectors changing ranks over the years as well.
- Technology sector companies are working to increase their attractiveness as more disruptor companies enter the marketplace:
 - Workplace benefits like unlimited holidays, free meals, as well as on-site gyms or discounted gym memberships are helping to make these companies more attractive to future employees.
 - Disruptor companies like Google who work to make daily working life more appealing through extra benefits successfully attract the best talent
- The construction sector has also moved up the rankings as it is now 6th in 2017 vs. 8th in 2016.
- IT and FMCG show the biggest drop in attractiveness, while retail and energy/utilities have gained attractiveness compared to previous years.
- Sectors like FMCG are struggling to maintain their appeal as economic turmoil has created an unfavourable marketplace. As the price of raw goods increases these companies are becoming increasingly pressured to cut costs which can have a negative impact on their employees.

attractiveness of each sector by year

| sector | 2017 | 2016 | 2015 | 2014 |
|--------------------|------|------|------|------|
| technology | 51% | 48% | 52% | 47% |
| IT | 50% | 58% | 56% | 56% |
| life sciences | 50% | 51% | 51% | 49% |
| automotive | 49% | 50% | 50% | 47% |
| industrial | 49% | 50% | 50% | 45% |
| construction | 46% | 40% | 42% | 40% |
| chemical | 45% | 41% | 42% | 39% |
| energy/utilities | 42% | 35% | 35% | 37% |
| retail | 42% | 33% | 36% | 34% |
| financial services | 41% | 40% | 43% | 40% |
| FMCG | 40% | 46% | 47% | 44% |
| logistics | 40% | 36% | 38% | 38% |
| services | 38% | 37% | 40% | 39% |
| hospitality | 33% | 34% | 41% | 40% |

*Starting this year sector classifications are based on the International Standard Industrial Classification (ISIC) whereas in previous years another classification was used. As a result, analysis of sector trends over time should be interpreted with care.

different regions favour different sectors but the key attributes that define top performing companies are similar

- Several key attributes are present across the top sectors in each region with financial health and use of the latest technology topping the ranks:
 - While being financially healthy is an obvious goal for all companies, those that wish to attract new employees should also focus on their technology and keeping it up to date. Consumers who use the latest technologies in their home life will expect their place of business to do the same. Although having the latest tech is not a top priority for new employees, if a company fails to update they will stand out in a negative way against their competitors in their sector
- Top sector companies are also deemed to have a very good reputation – something which people find important in deeming whether an employer is desirable or not:
 - Building a positive reputation can take time but the benefits are well worth it as 20% of the Randstad Employer Brand Research respondents feel that this is a 'must have' in a future employer.

core values attributed to top sector companies by region

IT sector in LATAM

- Uses latest technology available
- Financially healthy
- Has a very good reputation
- Career progression opportunities
- Stimulating and challenging work

automotive sector in Europe

- Uses latest technology available
- Financially healthy
- Has a very good reputation
- Long-term job security
- Career progression opportunities

technology sector in North America

- Uses latest technology available
- Financially healthy
- Has a very good reputation
- Stimulating and challenging work
- Career progression opportunities

industrial sector in APAC

- Financially healthy
- Has a very good reputation
- Uses latest technology available
- Long-term job security
- Career progression opportunities

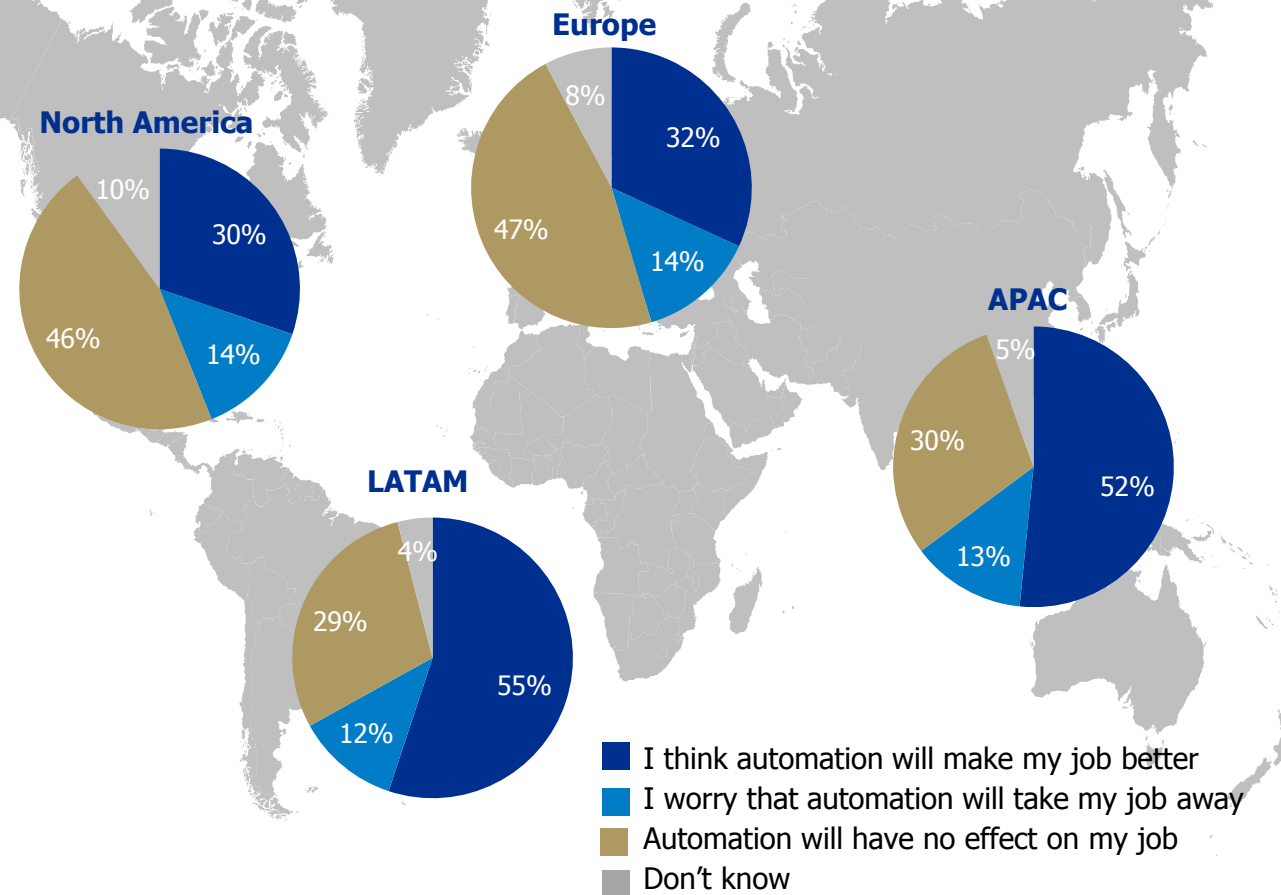
looking ahead

What is the potential employees' view of automation in the workplace as well as any potential retraining in consequence.

despite media coverage, across the world employees are unconcerned by the coming threat of automation, believing it will have no effect (39%) or even make their job better (40%)

- While almost half of all employees in North America and Europe and almost a third of employees in APAC and LATAM believe automation will have no effect on their job, their perception contrasts with reality. It is estimated that up to half of all jobs could be automated in the next two decades.⁹
- A wide range of jobs will be affected by automation. Advances in technology will affect non-manual jobs even more than manual jobs.¹⁰ This is because of the routine nature of the work. For example, a radiologist who identifies diseases and injuries by looking at x-rays could be more easily replaced by a computer that can identify ailments instantly and more accurately. On the contrary, a janitor performs a wider range of manual tasks that may be more difficult for a robot to learn and perform accurately.¹¹
- It's also worth noting that 1 in 10 employees in North America don't know how automation will affect their jobs, whereas there is more awareness of automation in APAC and LATAM, with fewer (approximately 1 in 20) stating they don't know how automation will affect their jobs.
- Over half of employees in APAC and LATAM believe that automation will make their job better, whereas less than a third believe this to be the case in North America and Europe. This may come down to a greater understanding of automation in these regions. There may be an understanding that automation will help with difficult manufacturing work and allow for new and better paid jobs in APAC and LATAM. The alternative however, could also be true – employees in these regions may be less aware of the negative implications of automation and how it will affect their jobs.

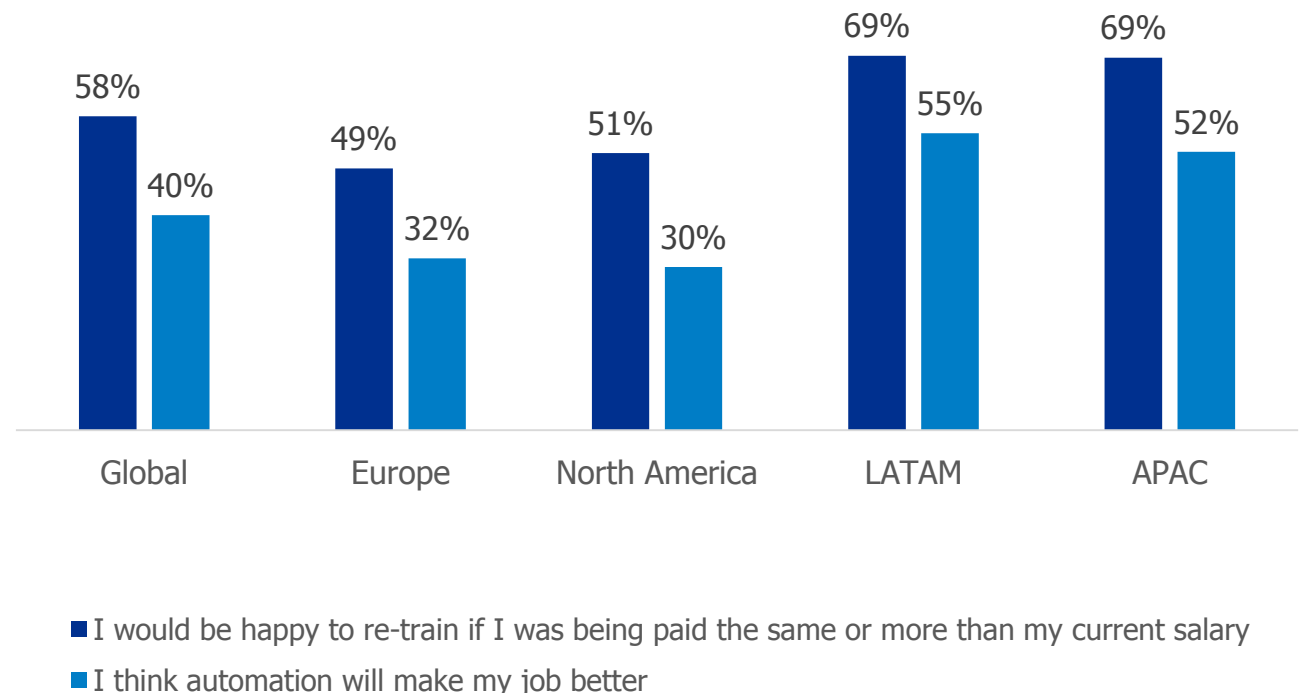
perception of automation on jobs



companies should plan to retrain employees as digital automation makes certain skillsets obsolete

- Over half of those in LATAM and APAC believe that automation will make their job better. On top of this, they express a greater interest in retraining if their jobs were to become automated with around 7 in 10 willing to retrain:
 - Automation reduces routine tasks thus freeing up time for employees to work on more interesting and difficult projects for which retraining could be necessary.
- While only a third of European and North American employees think automation will make their job better, half accept the situation and are willing to retrain.
- Retraining or training in general can also endear employers to their staff. 28% of those surveyed in our study say that good training is one of the most important attributes in a potential employer.
- “Nobody can predict the full impact of technological change in coming decades, which may be faster and broader than previous ones. What is clear, however, is that policy makers face a race between technology and education, and the winners will be those who encourage skill upgrading so that all can benefit from digital opportunities.”¹⁰
 - Although this recommendation from the World Bank is for policy makers, if companies take it on board they will benefit from a retrained, more specialised workforce

willingness to retrain due to automation



summary of findings and a point of view on what companies should focus on for the future

- The majority of respondents feel that salary and benefits are the most important factor when looking for a new employer, so companies need to make sure that they react to the marketplace in a competitive way. This is consistent with findings from previous years.
- Age plays an important role when it comes to what people look for in a new employer with those who are younger seeking career progression opportunities while older people prioritise long-term job security and the financial health of the company.
- While all regions prioritise good work-life balance and career progression, certain areas stand out in their ranking of these factors. Good work-life balance ranks highly for APAC, Europe and North America while career progression is important for LATAM.
- We see various sectors changing position in the ranking over the past years: the technology sector ranks 1st this year but 5th in 2016. The FMCG and IT sectors have become less attractive while retail, construction and energy/utilities have gained in attractiveness.
- When it comes to the differences in priorities for male and female workers a pleasant work atmosphere and diversity are particularly important to women. Companies should highlight what they are doing to tackle both to attract female talent.
- Over half of employees in APAC and LATAM believe that automation will make their job better, whereas less than a third believe this to be the case in North America and Europe. When looking to implement automation strategies, companies should focus on how they will retrain their employees to ensure they maintain a positive brand image.

employer branding

The value and importance placed on employer branding in terms of reputation and therefore attractiveness continues to grow in an increasingly competitive global talent marketplace.



why employer branding matters

Companies with positive brands get twice as many applications as companies with negative brands, and they spend less money on employees¹²



50% of candidates say they wouldn't work for a company with a bad reputation - even with a pay increase¹²



80% of talent leaders agree that a strong employer brand has a significant impact on their ability to hire great talent.¹⁸ And because people work for cultures not companies, their perception of you as an employer is of paramount importance. Both recruiters and candidates cite company culture as one of the most important determinants in employer choice. And your culture is transparent: candidates actively research the culture of companies to understand if they'll fit. If candidates see positive employee and candidate experiences on review sites, they feel more confident submitting their resume and making a career move.

96%

Agree that alignment of personal values with a company's culture is a key factor in their satisfaction working there¹⁴

Companies with bad reputations pay 10% more per hire¹⁵



62% of candidates research companies on social media before applying¹⁶



88%

Millennials and minorities agree that being part of the right company culture really matters to them¹⁴

87%

Joined a company specifically because of cultural fit¹⁴

80%

Have left a company specifically because of its culture¹⁴

the commercial value of a strong employer brand is increasingly recognised

- **There is growing concern among CEOs about finding and keeping the best talent to achieve their growth ambitions:**

- 38% of global employers reported talent shortages in 2015, the highest percentage since 2007.¹⁷
- 73% of CEOs reported being concerned about the availability of key skills.¹⁸

- **Companies that have strong employer brands enjoy significant cost savings with lower cost per hire and employee turnover rates:**

- Cost per hire is over 2 times lower for companies with strong employer brands¹⁹
- Companies with stronger employer brands have 28% lower turnover rates than companies with weaker employer brands¹⁹
- 59% are investing more in their employer brand compared to last year.²⁰

'The future of work will bring radical change for talent, companies and society, a change where the digitalization is disrupting many traditional approaches from education to employment.'

Jacques van den Broek, CEO Randstad

80%

Over 80% of leaders acknowledge that employer branding has a significant impact on their ability to hire talent.²¹

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