

employer branding

perception is reality

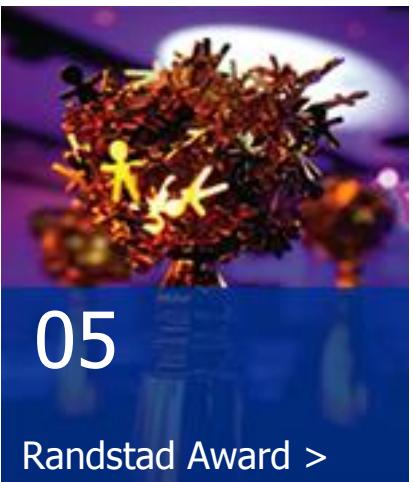
international insights

international report

Randstad Award results 2016

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Randstad Award results 2016: international



introduction

what is the
Randstad Award?



what is the Randstad Award?

the world's largest survey on employer branding

independently conducted survey with more than 200,000 respondents worldwide

truest reflection of employer attractiveness for each country's largest employers

valuable insights to help companies shape their brand



25 countries

covering 75% of the global economy



representative sample
aged 18 to 65
based on region,
age and gender

sample comprised
of students,
employed and
unemployed
workforce

interviews
conducted online
between
September 23
and December 8,
2015



global insights

snapshot

despite a fragile economic recovery in 2015, overall employer brand attractiveness across 25 countries shows decrease in 2016

employer brand attractiveness: based on percentage of talent that would like to work for the employer

decrease in 17 countries. In the USA, France and Russia down with 5%

worldwide negative trend in employer brand attractiveness



37% worldwide would like to work for one or more of the largest employers in their country

newcomers Portugal and Malaysia have a score of respectively 37% and 45%

New Zealand, Japan, Canada and China remain stable. Small increase in Germany: 32% in 2015 to 33% in 2016

salary still top priority for job seekers worldwide followed by job security; employers are perceived to perform weaker on these and other core values like atmosphere and balance

core values searched by potential talent in 25 countries

potential employees search...

- 1. salary & employee benefits**
- 2. long-term job security**
- 3. pleasant work atmosphere**
4. work-life balance
5. financial health
6. career prospects
7. job content
8. good training
9. strong management
10. corporate social responsibility

core values attributed to largest employers in 25 countries

employers score best on...

1. financial health
2. strong management
3. good training
- 4. salary & employee benefits**
5. career prospects
- 6. long-term job security**
7. job content
- 8. pleasant work atmosphere**
9. corporate social responsibility
10. work-life balance

disharmony between what potential talent find important and how they rate employers on these values

top 3 core values are salary, job security and atmosphere – which rank only at position 4, 6 and 8 among employers

employers score best on financial health, strong management and training – which are only at position 5, 9 and 8 in core values searched by potential employees

employers perform weakly in major drivers atmosphere and work-life balance

top 3 most attractive global sectors by zone

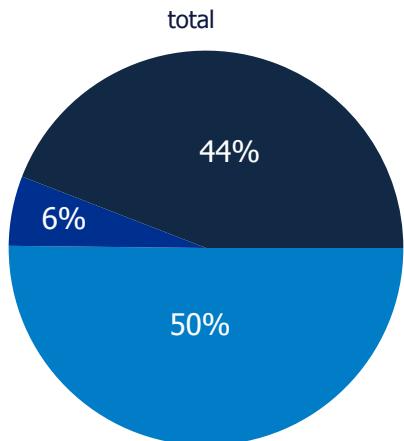
	1 st position	2 nd position	3 rd position
Americas	IT	life sciences	consulting
APAC	consulting	IT	life sciences
Europe	IT	automotive	life sciences
Russia	industrial	technology	automotive

half of the global workforce are satisfied with their current working schedule, while 44% are willing to work more at a higher pay

feelings about current work schedule

% global workforce is...

- happy with current schedule
- willing to work less
- willing to work more



top 3 motivators to work more

- increase income
- step in career (promotion)
- fulfill potential/personal development

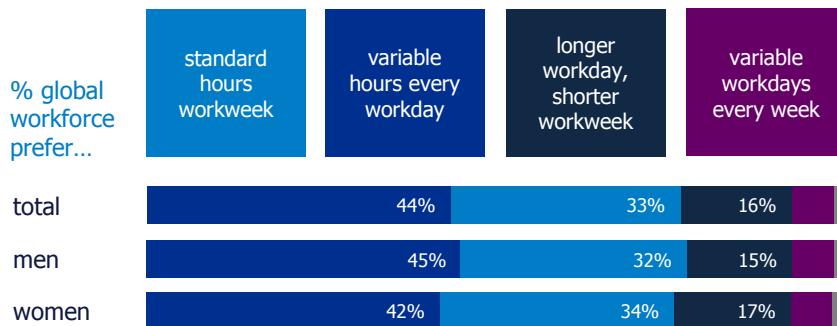
	men	women
increase income	86%	88%
step in career (promotion)	38%	33%
fulfill potential/personal development	30%	27%

top 3 motivators to work less

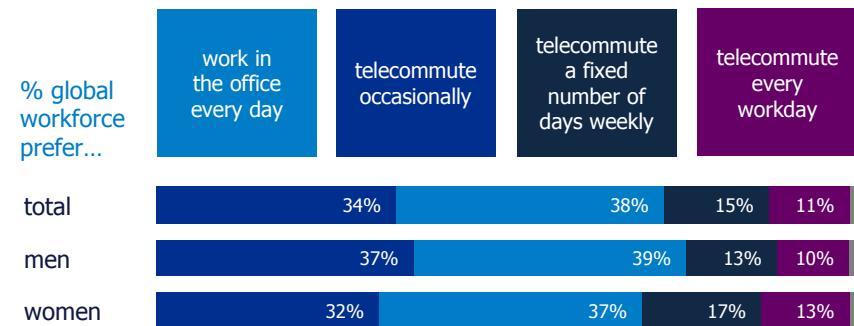
- free time for myself
- healthier work-life balance, less stress
- sports, leisure, hobbies

	men	women
free time for myself	74%	65%
healthier work-life balance, less stress	63%	68%
sports, leisure, hobbies	44%	36%

preference to have more flexibility in working hours



preference for telecommuting





employer branding



why employer branding matters

10%

lower payroll costs for companies with good employer brand

source: LinkedIn

28%

lower staff turnover at companies with a strong employer brand

source: [LinkedIn](#)

indexed cost-per-hire is

46%

lower at companies with good/strong branding

source: [LinkedIn](#)

84%

would leave their current job to work for a company with a better corporate reputation

source: [Glassdoor](#)

'Countries, companies, and employees all have slightly different needs. The employer brand should therefore seek to articulate and convey the rich and varied traits that make an organization unique.'

Jacques van den Broek,
CEO Randstad

4 steps to get the most of your employer brand



step #1

measure what you offer
vs. what your employees
really want



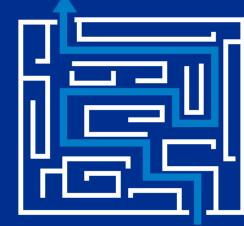
step #2

specify your EVP - take
target audience into
account



step #3

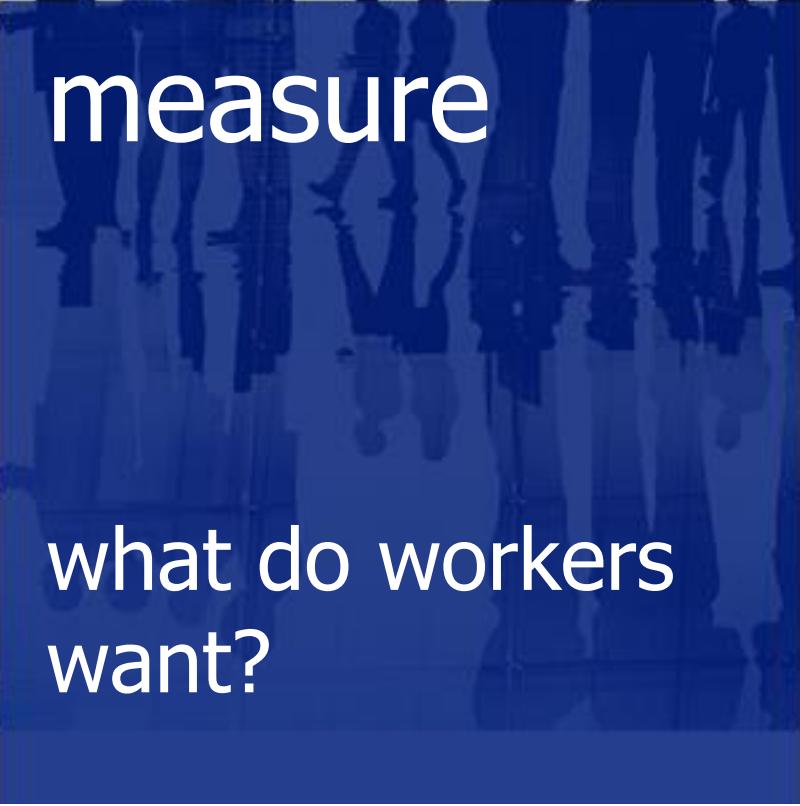
communicate your
offerings to your
(potential) employees -
reflect the reality



step #4

look ahead - 3 year plan
to anticipate future needs
of your employees

for a strong Employer Brand, create a credible Employee Value Proposition (EVP) and maximize its effect on the attraction, retention and engagement of talent in 4 steps



measure

what do workers
want?

what do workers worldwide want?

most important factors looked for in an employer

61%

point at salary & employee benefits as important within their top 5

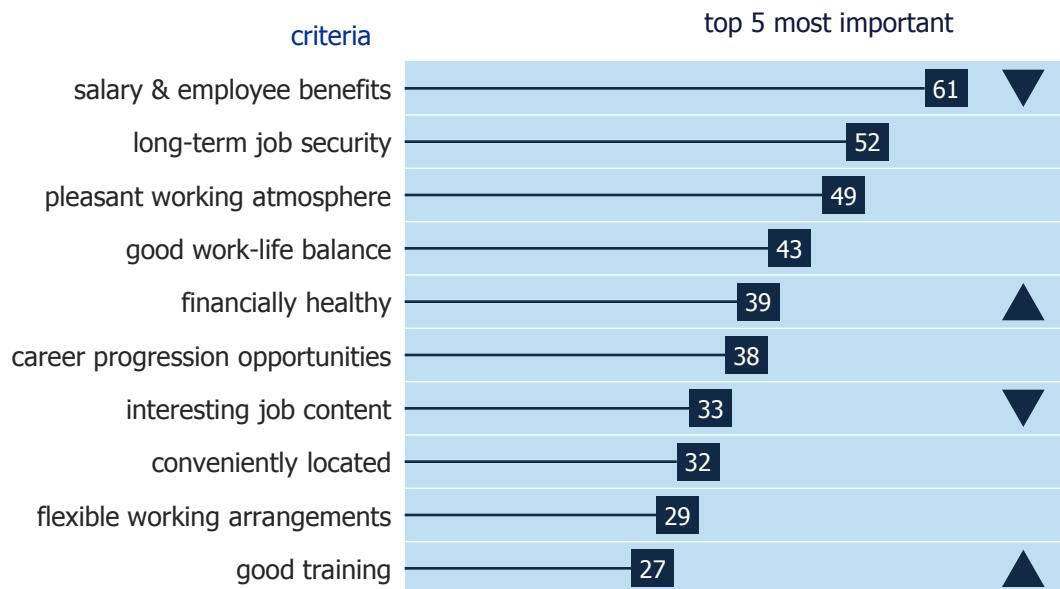
52%

seek job security when choosing a company to work for

49%

mention pleasant working atmosphere in their top 5 most important factors

salary is the primary factor determining the global workforce's preference for a particular firm , but its importance has decreased



training has gained importance in the past year

job content has decreased in importance compared to last year

different profiles, different needs

demographic differences

women

look more for atmosphere, balance, convenient location and flexible working arrangements

vs

men

look more for financial health, (international) career prospects and job content



young

talent more oriented towards training, job content and international opportunities in companies that use latest technologies

vs

older

workforce more concerned with high salary and job security in financially healthy companies



higher educated

more driven by international career opportunities and job content

vs

lower educated

seek more job security, atmosphere, flexibility and convenient location



function

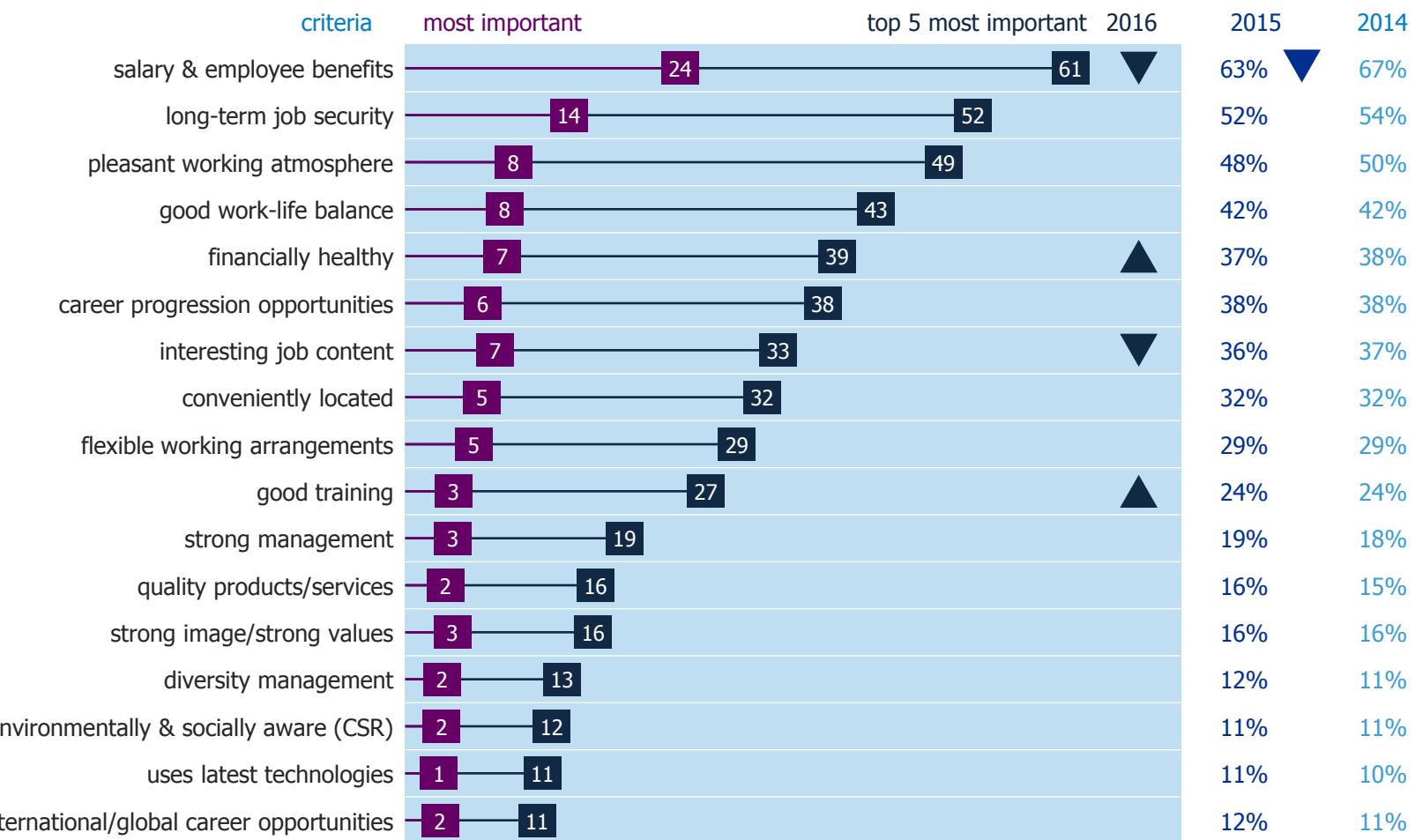
salary clearly has highest importance among employees in legal

job security most valued among public officers and employees in services

atmosphere particularly important to social and community workers

most important job attributes viewed by potential employees worldwide

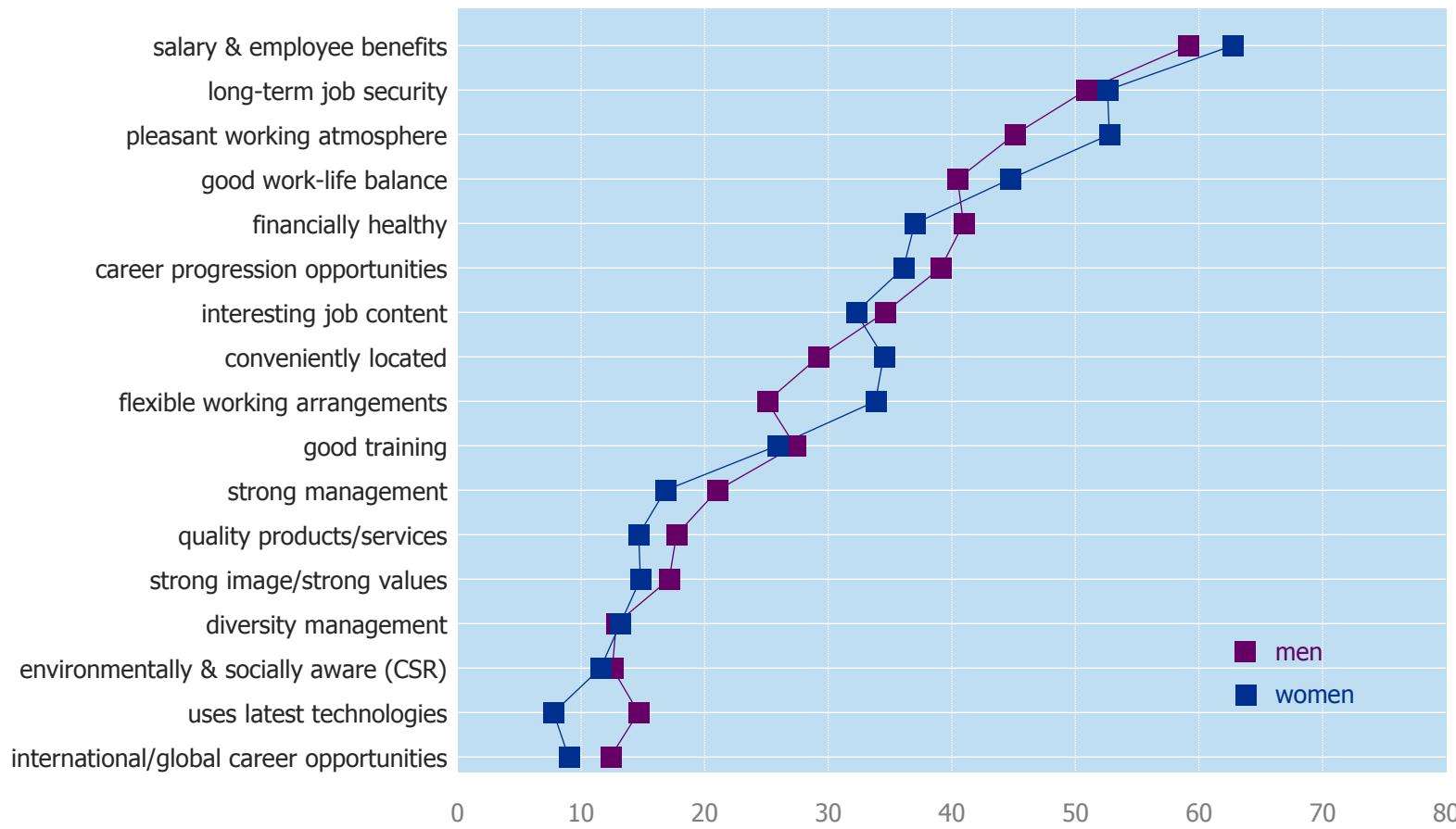
what are the most important criteria to potential employees when choosing an employer?



attributes viewed by gender

what are the most important criteria to potential employees when choosing an employer?

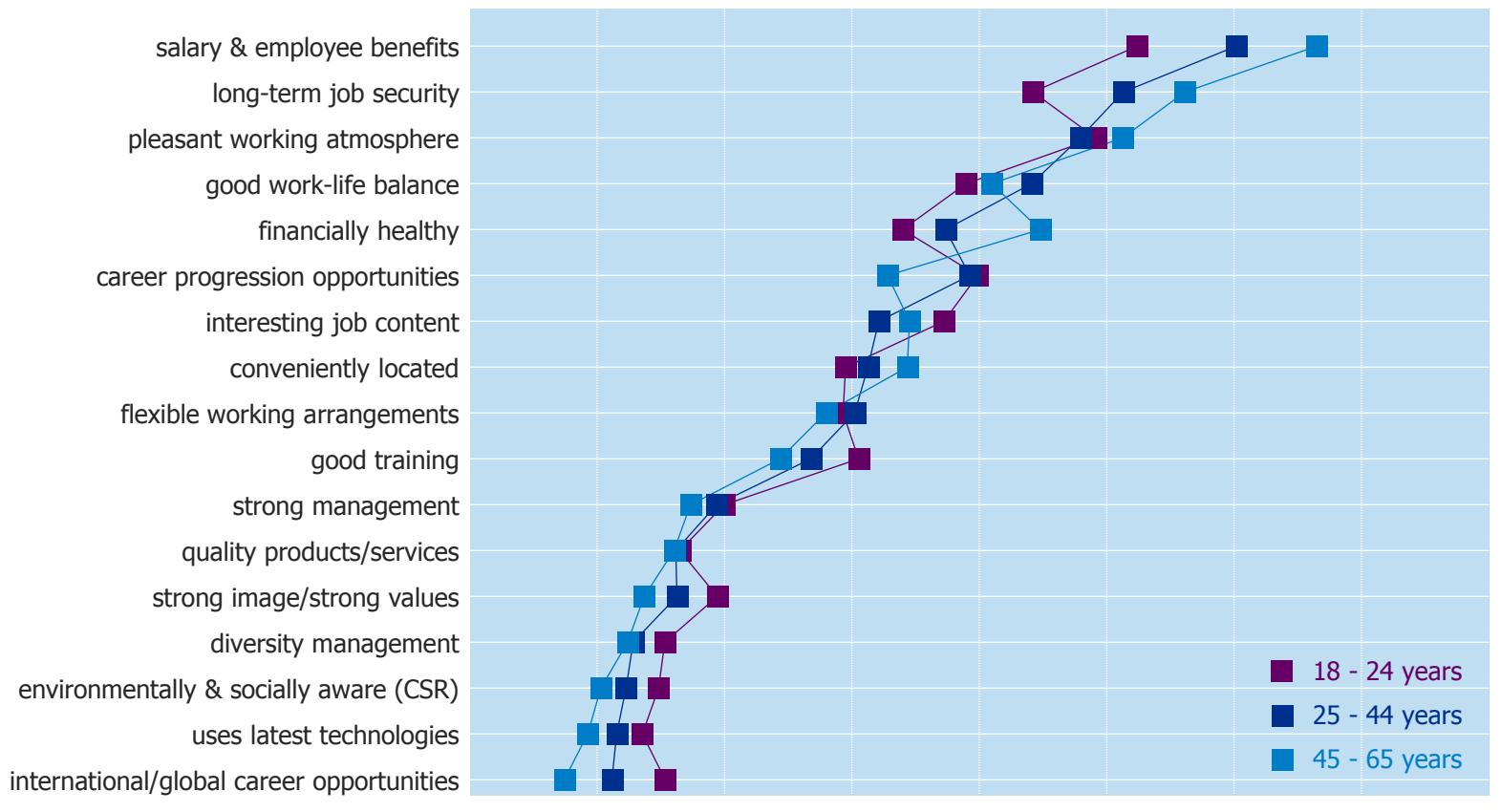
criteria viewed by gender – ranked by occurrence in top 5



attributes viewed by age

what are the most important criteria to potential employees when choosing an employer?

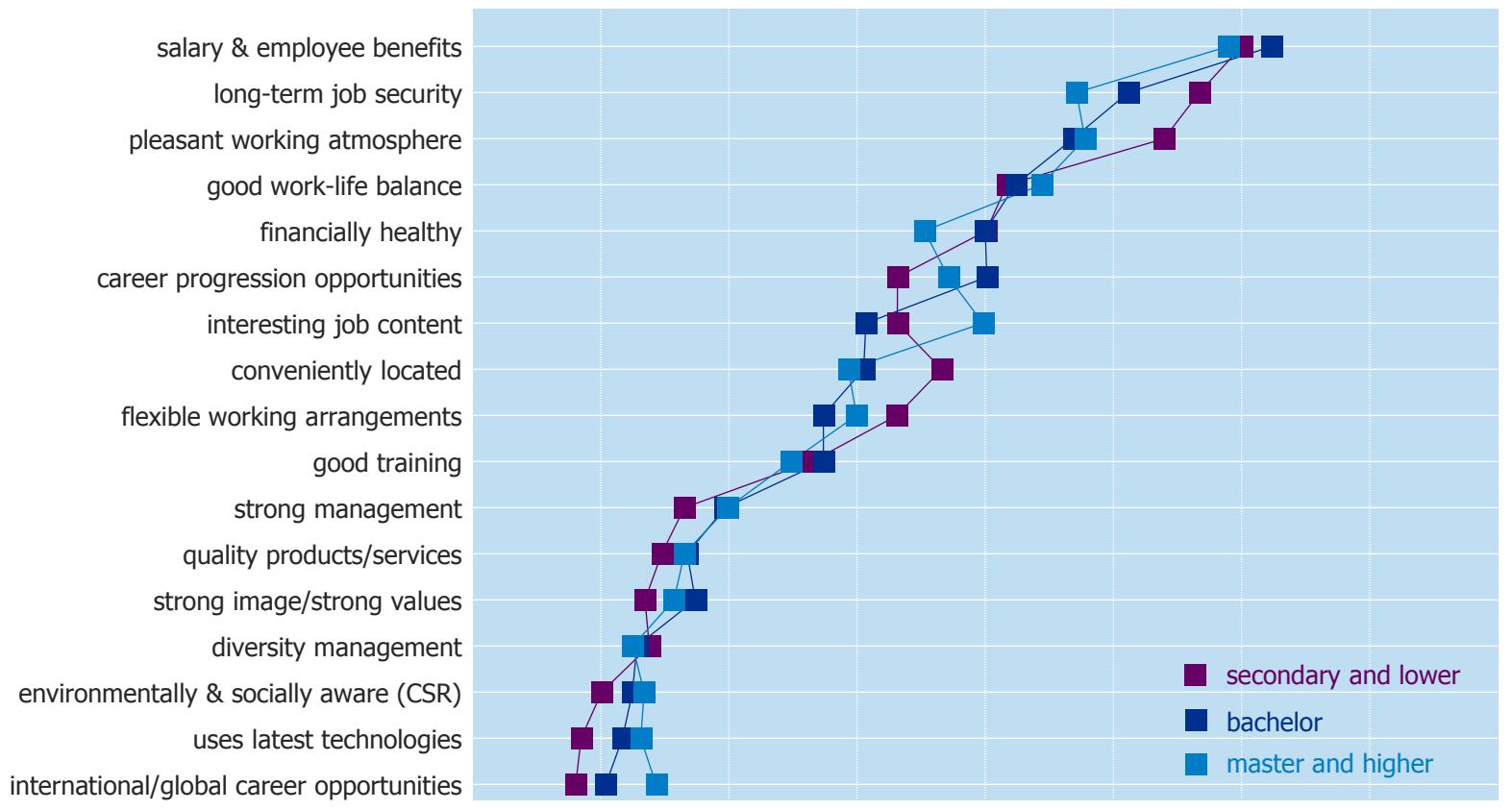
criteria viewed by age – ranked by occurrence in top 5



attributes viewed by education level

what are the most important criteria to potential employees when choosing an employer?

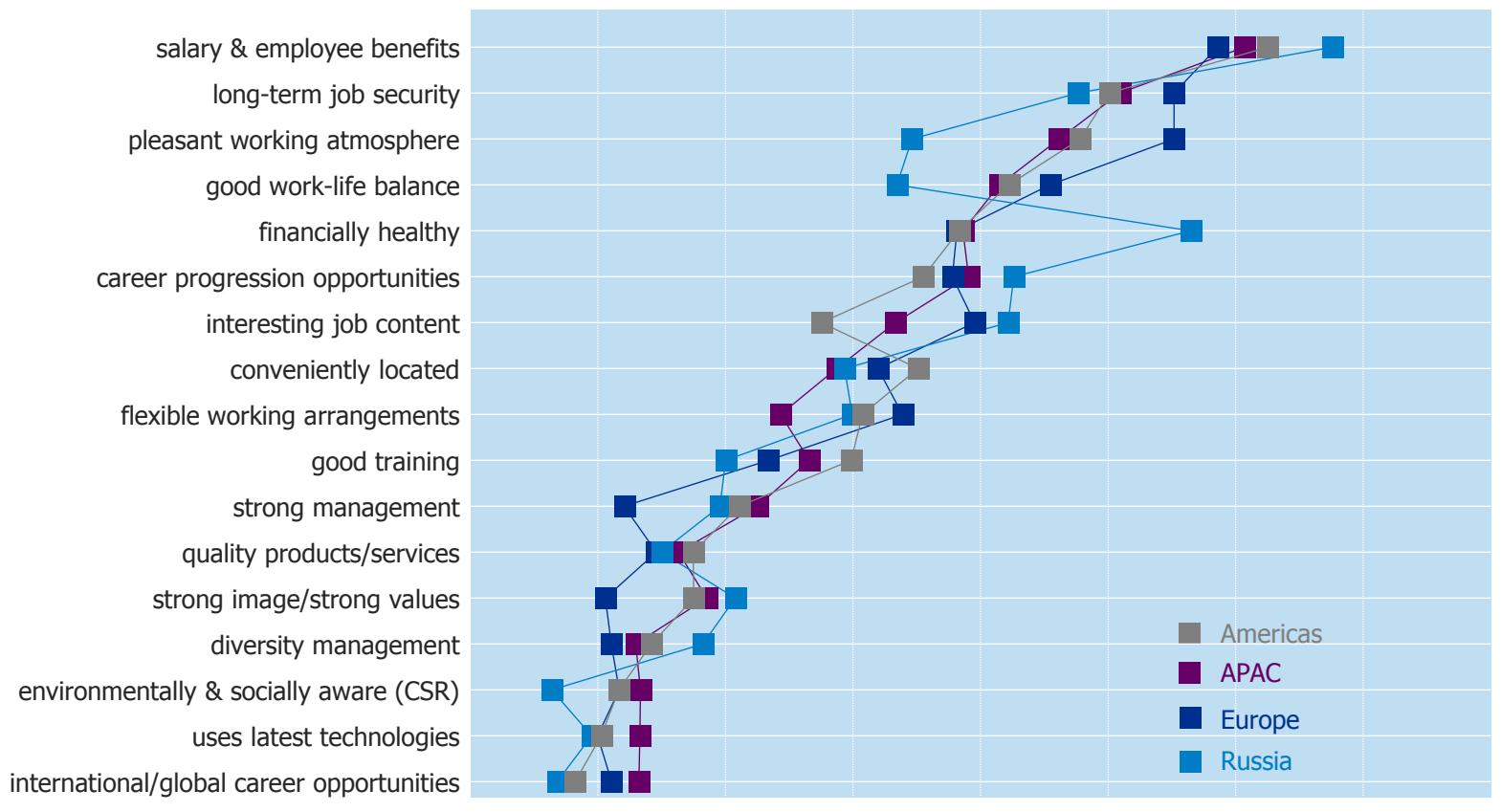
criteria viewed by education level – ranked by occurrence in top 5



attributes viewed by zone

what are the most important criteria to potential employees when choosing an employer?

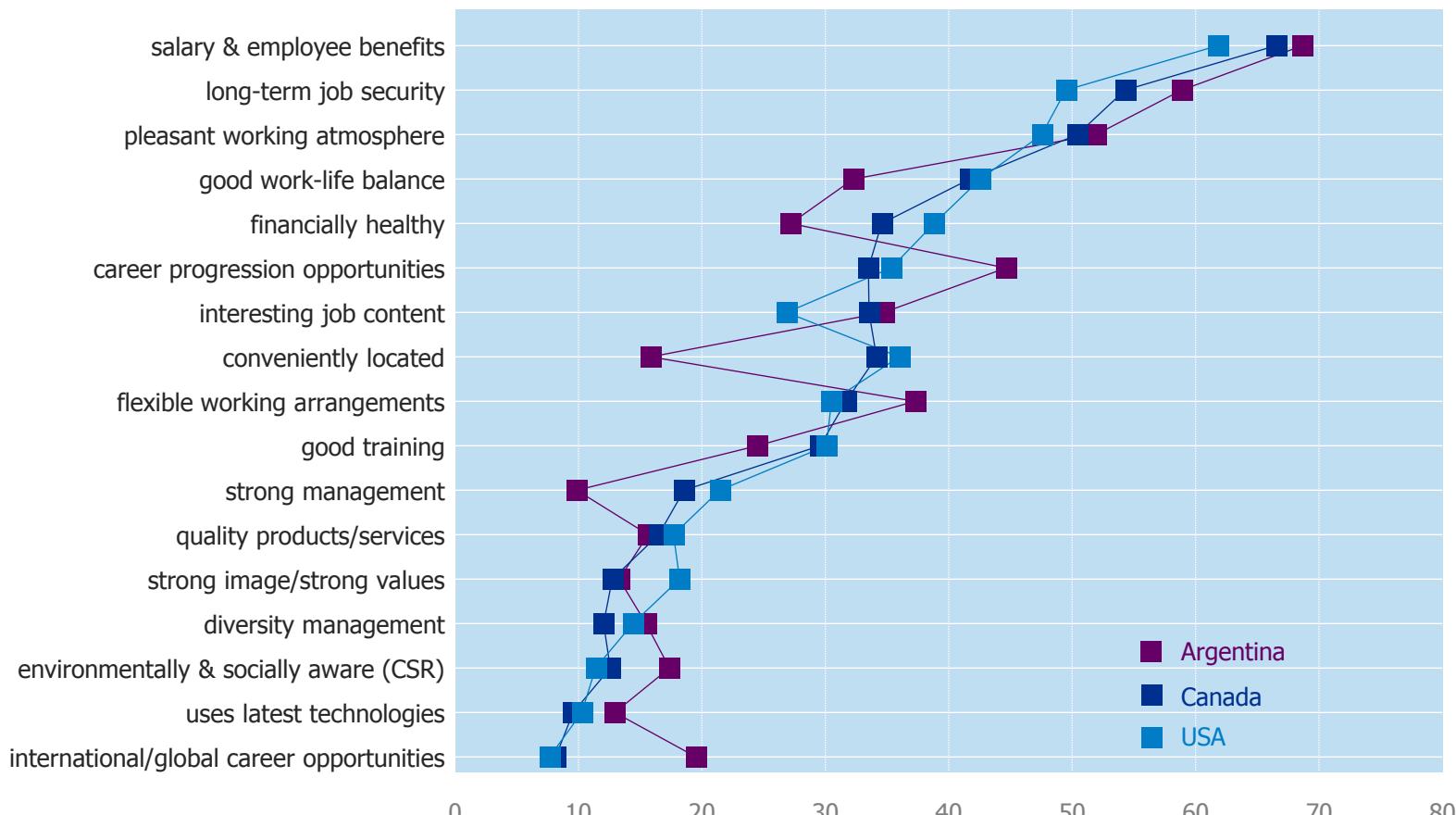
criteria viewed by zone – ranked by occurrence in top 5



attributes viewed by country - Americas

what are the most important criteria to potential employees when choosing an employer?

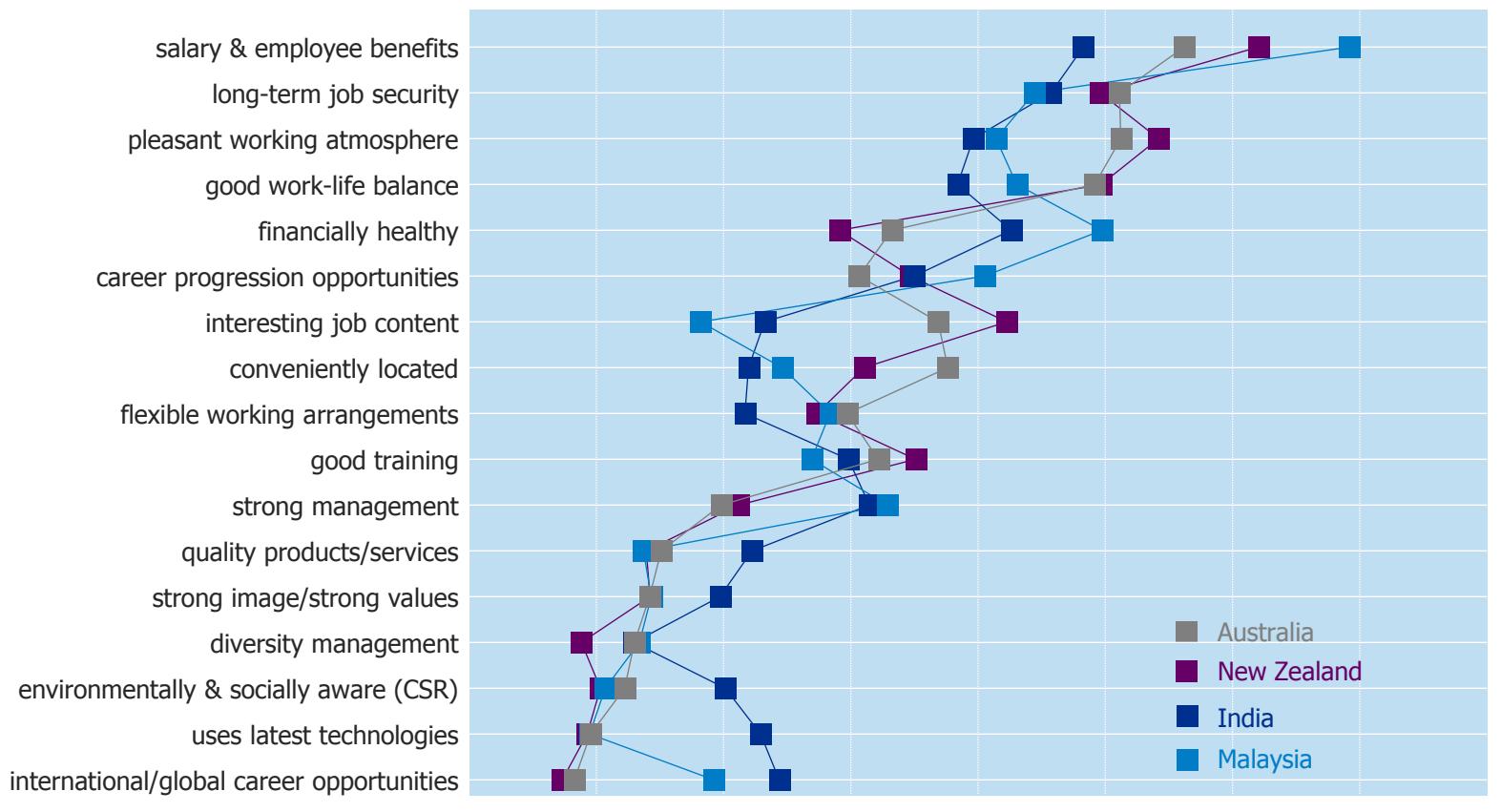
criteria viewed by zone (Americas) – ranked by occurrence in top 5



attributes viewed by country - APAC

what are the most important criteria to potential employees when choosing an employer?

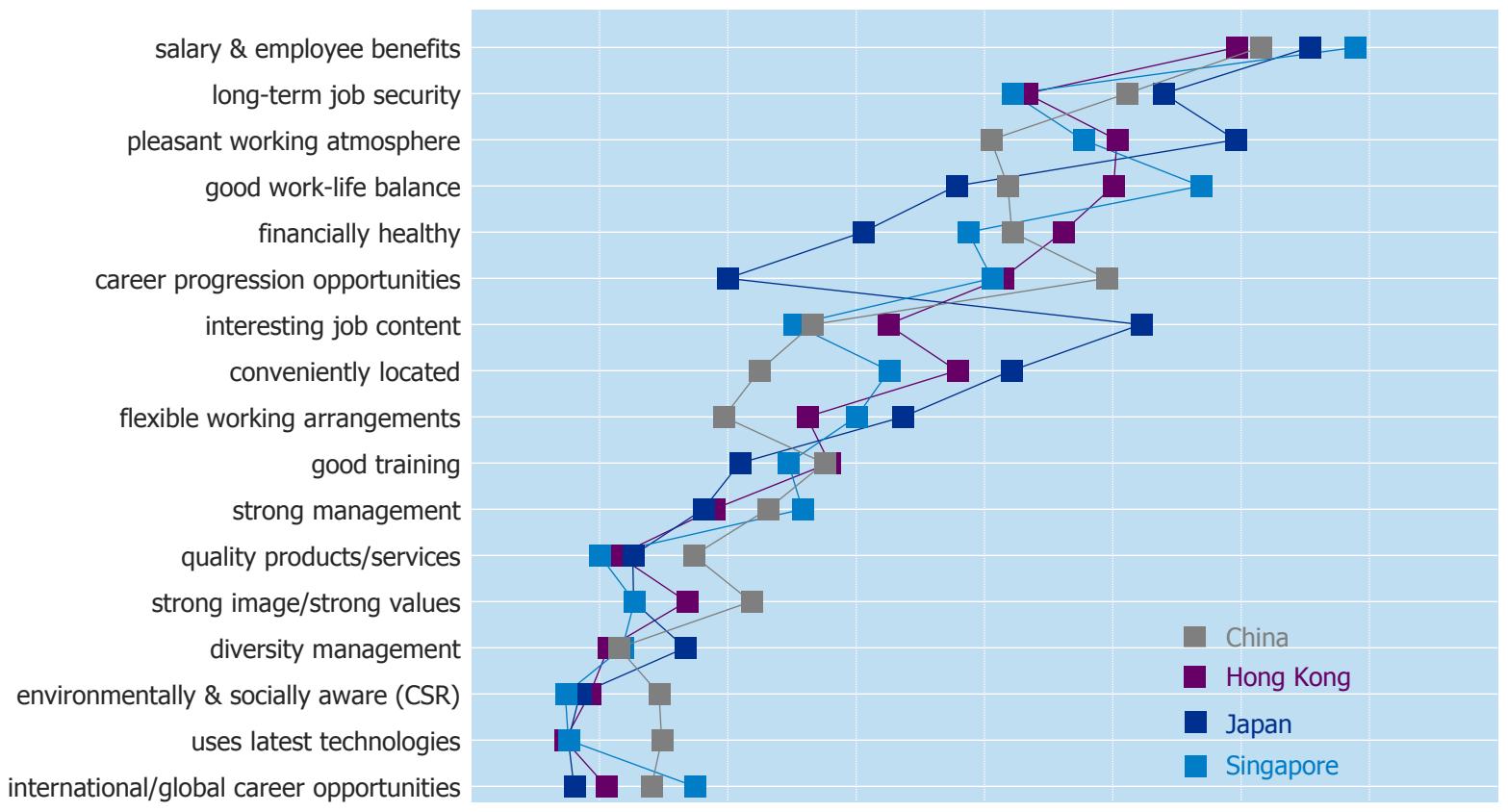
criteria viewed by zone (APAC) – ranked by occurrence in top 5



attributes viewed by country - APAC (continued)

what are the most important criteria to potential employees when choosing an employer?

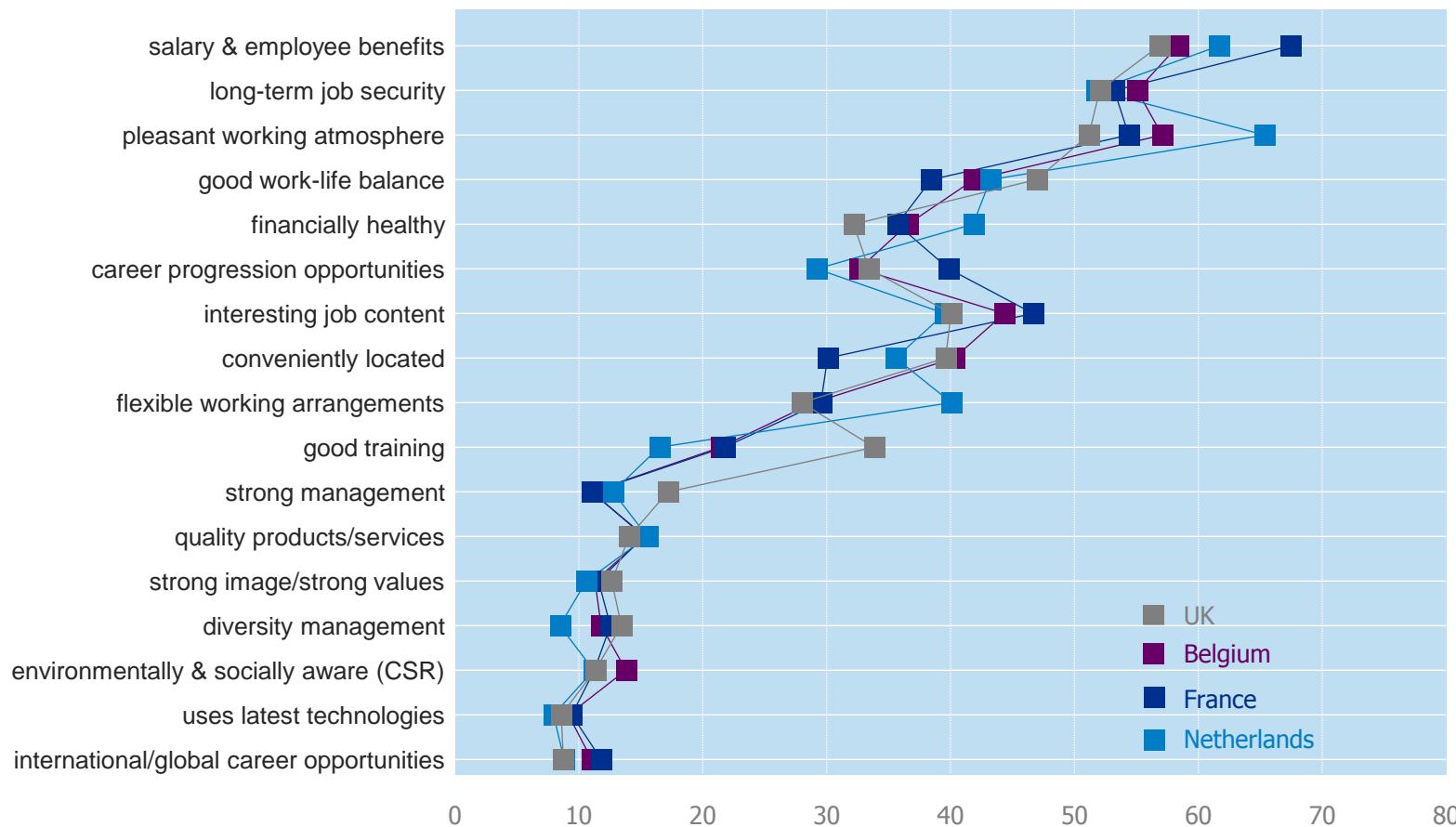
criteria viewed by zone (APAC) – ranked by occurrence in top 5



attributes viewed by country - Europe

what are the most important criteria to potential employees when choosing an employer?

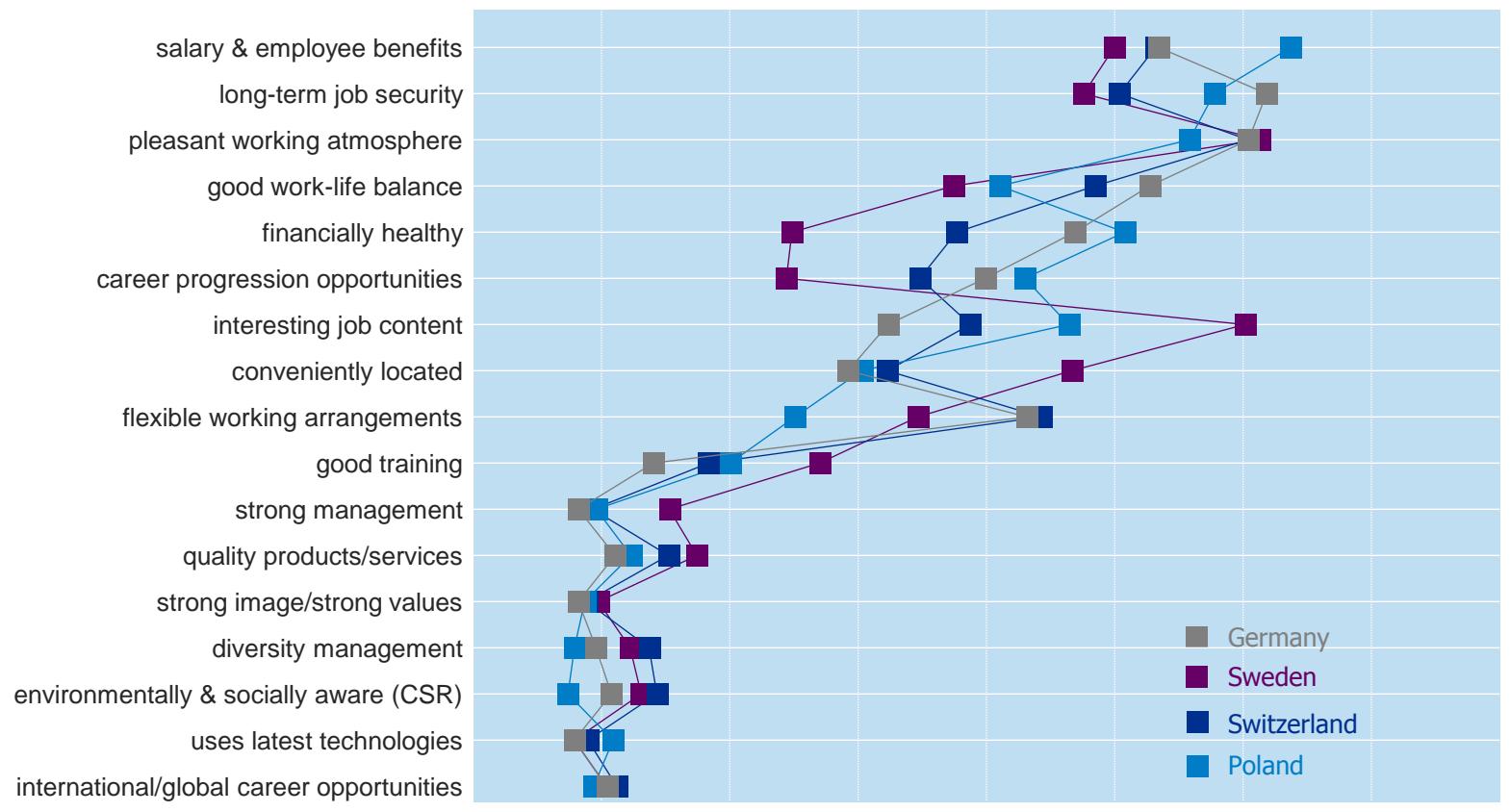
criteria viewed by zone (Europe) – ranked by occurrence in top 5



attributes viewed by country - Europe (continued)

what are the most important criteria to potential employees when choosing an employer?

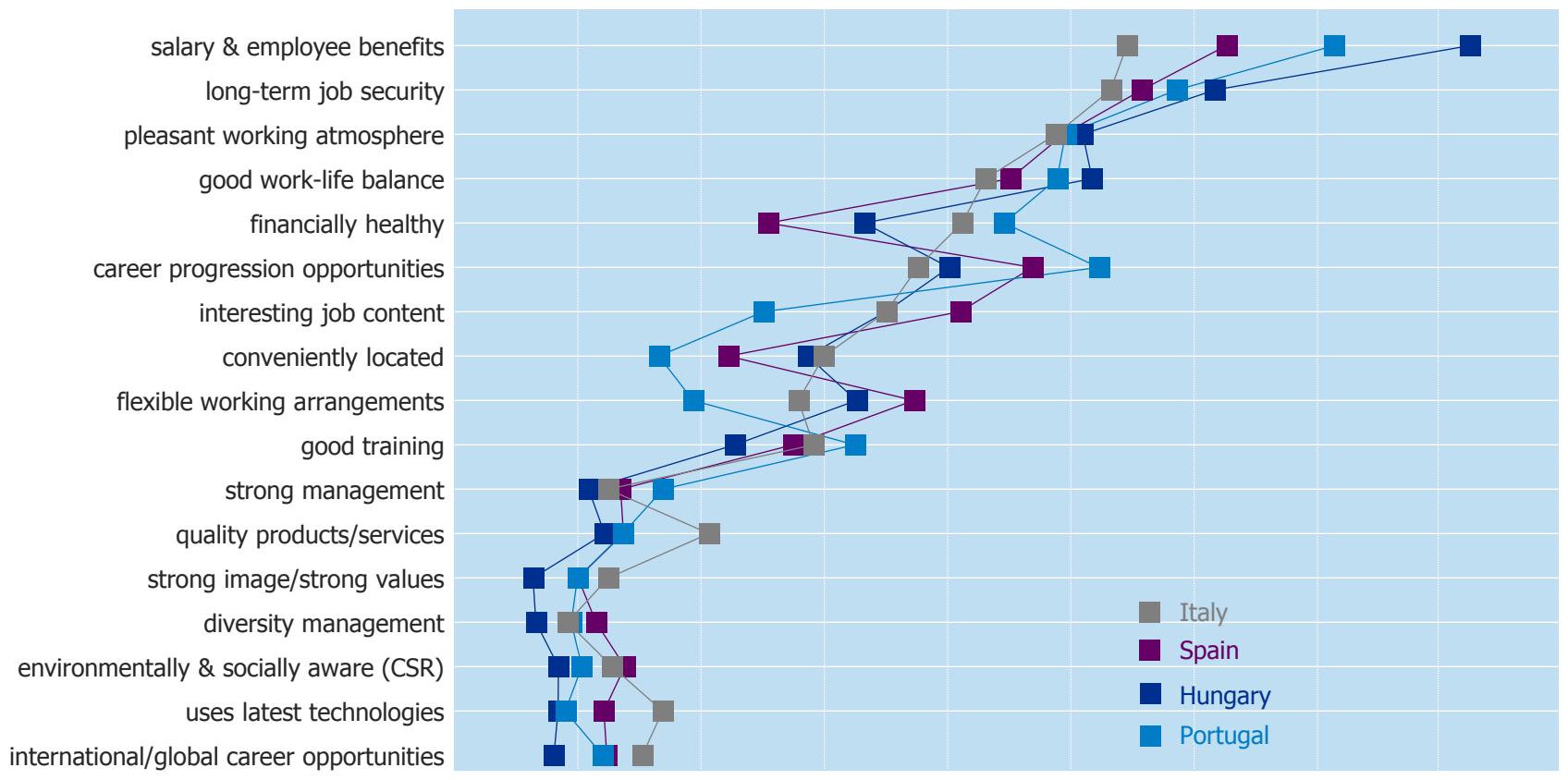
criteria viewed by zone (Europe) – ranked by occurrence in top 5



attributes viewed by country - Europe (continued)

what are the most important criteria to potential employees when choosing an employer?

criteria viewed by zone (Europe) – ranked by occurrence in top 5



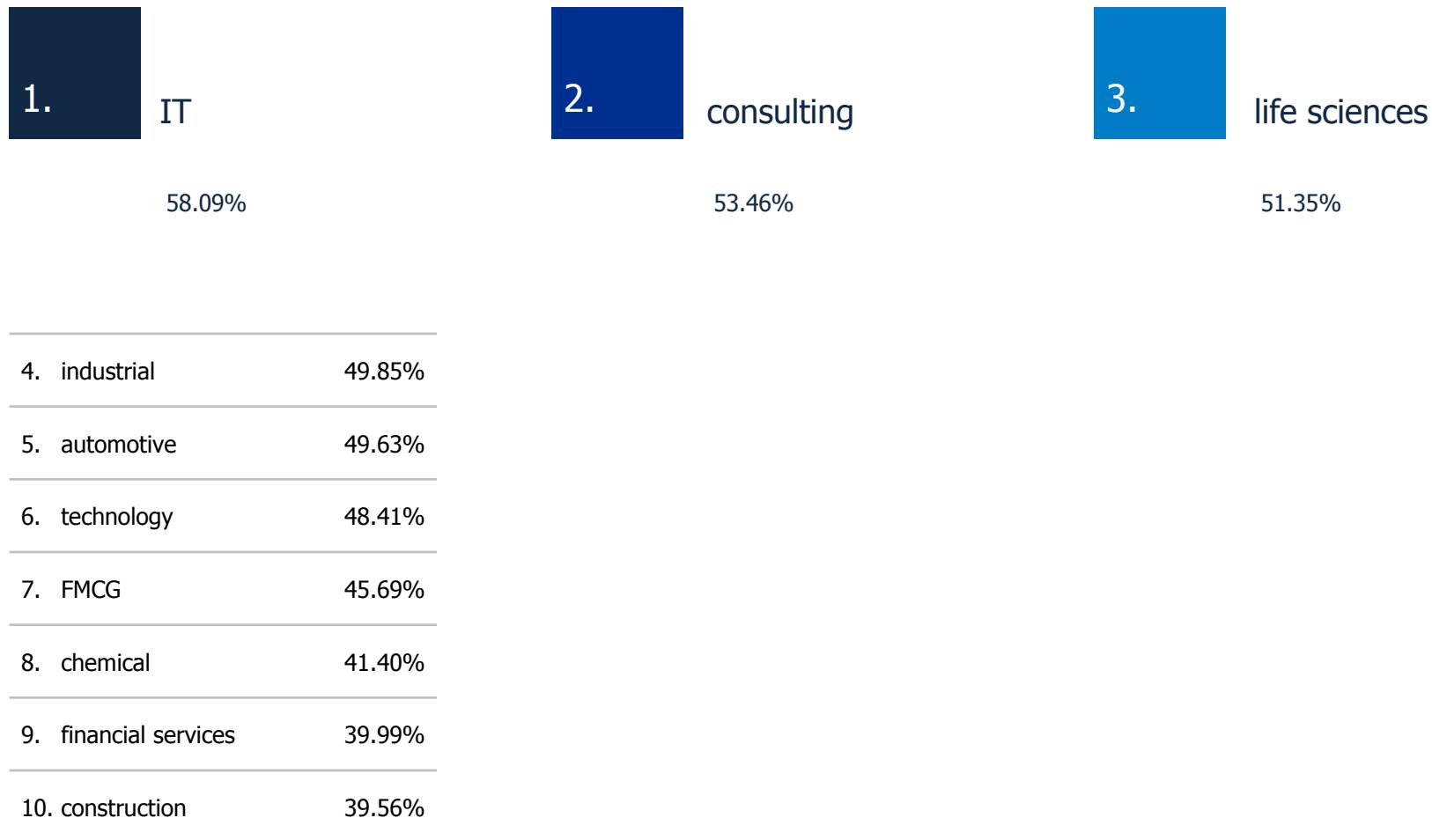


measure

how attractive is
your sector?

top 10 most attractive global sectors

attractiveness: among respondents who know one or more companies operating in a particular sector, percentage who would like to work for the companies within the sector*



*Local sectors are defined by the countries and reflect the country context. Global sectors are predefined by Randstad Holding and represent the 15 biggest sectors on a global level. See slide 63 for more information.

global sectors ranked by attractiveness

attractiveness: respondents who know one or more companies in these sectors and who would like to work for these companies*

	2016	2015	2014
1. IT	58.09%	56.26%	55.52%
2. consulting	53.46% 	49.39%	47.59%
3. life sciences	51.35%	51.33% 	48.52%
4. industrial	49.85%	49.90% 	45.45%
5. automotive	49.63%	49.96% 	47.32%
6. technology	48.41% 	51.61% 	46.51%
7. FMCG	45.69%	46.70% 	43.94%
8. chemical	41.40%	42.00% 	38.94%
9. financial services	39.99% 	42.83% 	40.11%
10. construction	39.56% 	41.95%	40.11%

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global sectors ranked by attractiveness

attractiveness: respondents who know one or more companies in these sectors and who would like to work for these companies*

	2016	2015	2014
11. services	37.38% 	39.88%	39.30%
12. logistics	36.33%	37.54%	38.40%
13. energy & utilities	34.70%	34.77% 	37.46%
14. hospitality	33.50% 	41.14%	40.37%
15. retail	33.45% 	36.20% 	34.18%

*Local sectors are defined by the countries and reflect the country context. Global sectors are predefined by Randstad Holding and represent the 15 biggest sectors on a global level. See slide 63 for more information.

top 3 most attractive global sectors by country - Americas

	1 st position	2 nd position	3 rd position
Argentina	IT	automotive	financial services
Canada	IT	logistics	automotive
USA	consulting	IT	life sciences

*Local sectors are defined by the countries and reflect the country context. Global sectors are predefined by Randstad Holding and represent the 15 biggest sectors on a global level. See slide 63 for more information.

top 3 most attractive global sectors by country - APAC

	1 st position	2 nd position	3 rd position
Australia	consulting	services	logistics
New Zealand	IT	consulting	financial services
India	IT	consulting	automotive
Malaysia	chemical	IT	hospitality
China	consulting	chemical	IT
Hong Kong	IT	logistics	services
Japan	FMCG	technology	life sciences
Singapore	chemical	hospitality	logistics

*Local sectors are defined by the countries and reflect the country context. Global sectors are predefined by Randstad Holding and represent the 15 biggest sectors on a global level. See Randstad Award country reports for local information.

top 3 most attractive global sectors by country - Europe

	1 st position	2 nd position	3 rd position
Belgium	life sciences	FMCG	technology
France	IT	technology	services
Netherlands	technology	FMCG	life sciences
Germany	IT	automotive	life sciences
Sweden	life sciences	FMCG	automotive
Switzerland	IT	industrial	life sciences
UK	automotive	life sciences	technology
Italy	IT	services	chemical
Spain	IT	technology	hospitality
Hungary	IT	technology	services
Poland	industrial	life sciences	automotive
Portugal	consulting	FMCG	technology

*Local sectors are defined by the countries and reflect the country context. Global sectors are predefined by Randstad Holding and represent the 15 biggest sectors on a global level. See [Randstad Award](#) for more information.

top 3 most attractive global sectors by country - Russia

	1 st position	2 nd position	3 rd position
Russia	industrial	technology	automotive

*Local sectors are defined by the countries and reflect the country context. Global sectors are predefined by Randstad Holding and represent the 15 biggest sectors on a global level. See slide 63 for more information.

Randstad Award



Randstad Award winners: top 3 most attractive companies by country - Americas

	1 st position	2 nd position	3 rd position
Argentina	Hewlett Packard	Toyota	LAN Argentina
Canada	Canadian Solar Inc.	IBM Canada Ltd.	Air Canada
USA	The Walt Disney Company	Microsoft Corporation	Computer Sciences Corporation (CSC)

Randstad Award winners: top 3 most attractive companies by country - APAC

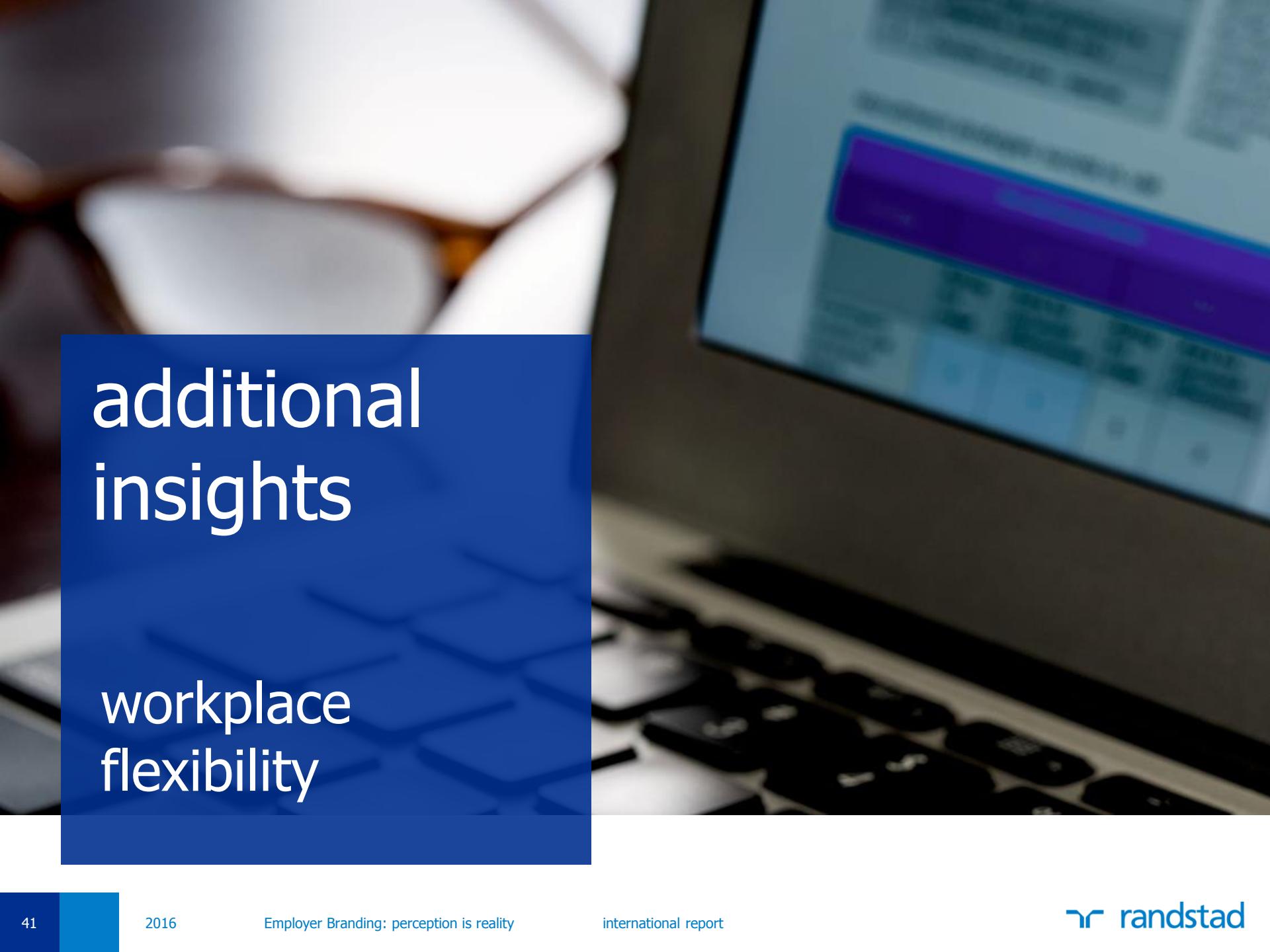
	1 st position	2 nd position	3 rd position
Australia	Virgin Australia	Qantas	BAE Systems
New Zealand	Department of Conservation	TVNZ	New Zealand Customs Service
India	Google India	Microsoft	Mercedes-Benz
Malaysia	Shell Malaysia	Petroliam Nasional Berhad (PETRONAS)	Nestle (Malaysia) Berhad
China	IBM	INTEL	ABB
Hong Kong	CLP	MTR	Ocean Park Corporation
Japan	SUNTORY HOLDINGS LIMITED	KIRIN HOLDINGS COMPANY, LIMITED	MEIJI HOLDINGS CO., LTD.
Singapore	Changi Airport Group	Procter & Gamble	ExxonMobil

Randstad Award winners: top 3 most attractive companies by country - Europe

	1 st position	2 nd position	3 rd position
Belgium	GSK (GLAXOSMITHKLINE)	Janssen Pharmaceutica	Brussels Airlines
France	Dassault Aviation	Airbus Group	EDF
Netherlands	Luchthaven Schiphol	KLM	Philips
Germany	BMW	Fraunhofer-Gesellschaft	Audi
Sweden	Ikea	Sveriges Television	Sveriges Radio
Switzerland	Google	PATEK PHILIPPE	Swatch
UK	Rolls-Royce Group	British Airways	Marks & Spencer
Italy	Ferrero	Apple	Maserati
Spain	IBM	Mercedes Benz	Atresmedia (Antena3, LaSexta, OndaCero...)
Hungary	AUDI	Mercedes-Benz	Szerencsejáték Zrt.
Poland	KGHM Polska Miedź	Polskie Linie Lotnicze LOT	Samsung Electronics Polska
Portugal	Transportes Aéreos Portugueses	Manuel Rui Azinhais Nabeiro	Nestlé

Randstad Award winners: top 3 most attractive companies by country - Russia

	1 st position	2 nd position	3 rd position
Russia	Gazprom	Gazprom Neft	Rosneft



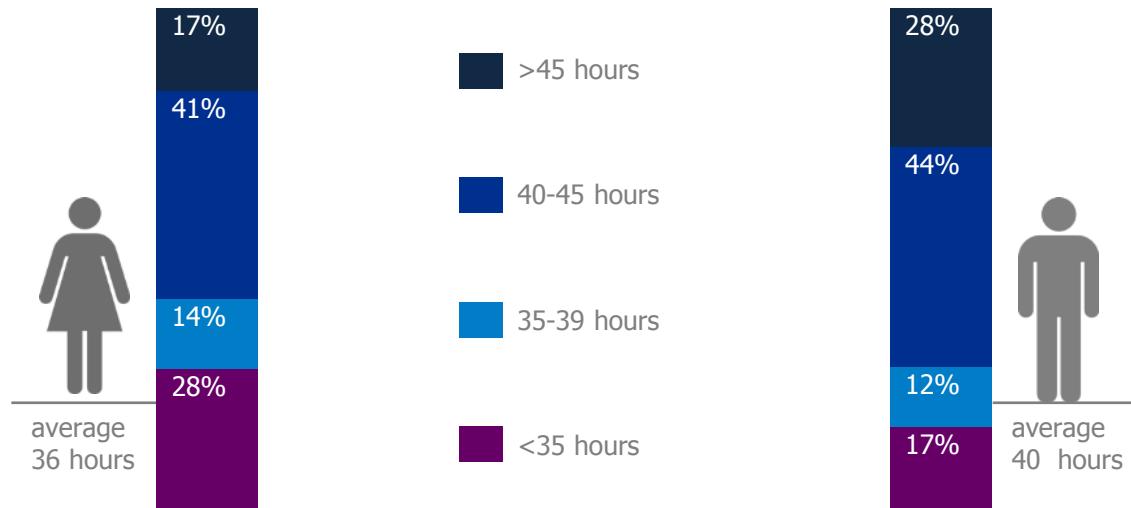
additional insights

workplace flexibility

how much do people work globally?

employees report working an average of 38 hours per week

average weekly hours worked by gender



according to their contract (fulltime, part time), employees have to work resp. 42 and 26 hours on average per week

in reality, global workers report working on average 43 and 30 hours per week (fulltime, part time)

average weekly hours worked by other sub groups

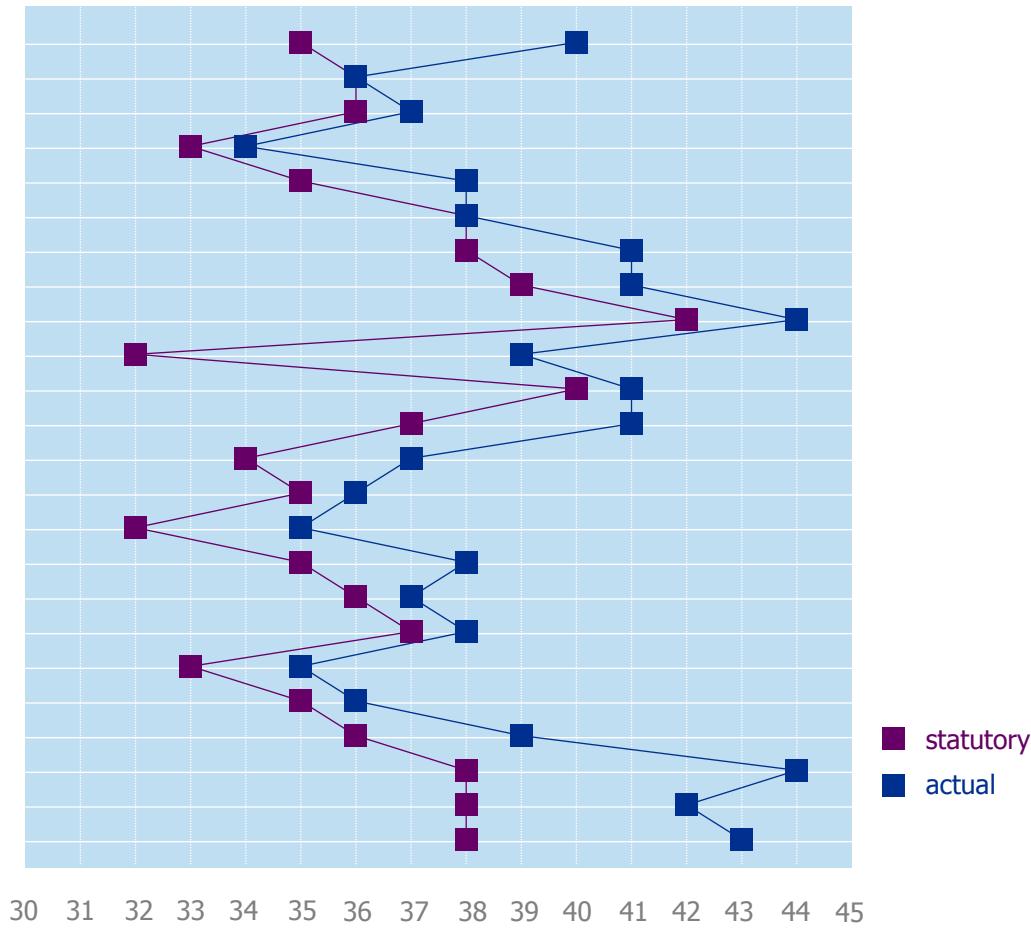
manager	41 hours	25 - 44 years	39 hours	master and higher	39 hours
office	38 hours	45 - 65 years	39 hours	bachelor	39 hours
production	36 hours	18 - 24 years	36 hours	secondary and lower	37 hours

65% report working more than 39 hours per week

how much do people work worldwide

working time statutory vs real

	statutory average	actual average	GAP
Argentina	35	40	5
Canada	36	36	0
USA	36	37	1
Australia	33	34	1
New Zealand	35	38	3
India	38	38	0
Malaysia	38	41	3
China	39	41	2
Hong Kong	42	44	2
Japan	32	39	7
Singapore	40	41	1
Portugal	37	41	4
Belgium	34	37	3
France	35	36	1
Netherlands	32	35	3
Germany	35	38	3
Sweden	36	37	1
Switzerland	37	38	1
UK	33	35	2
Italy	35	36	1
Spain	36	39	3
Hungary	38	44	6
Poland	38	42	4
Russia	38	43	5



how do employees perceive their work schedule?

young people (aged 18-24) are most willing to work more at higher pay



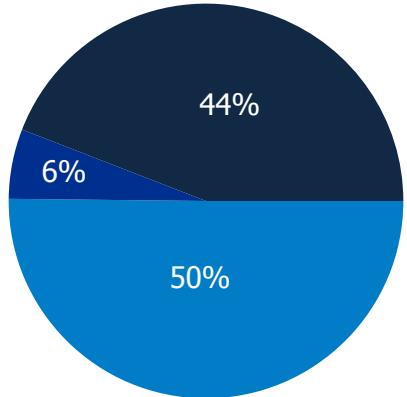
how do employees perceive their work schedule?

employees in The Netherlands, Belgium and Poland are most satisfied with their current working schedule

	current schedule	work more at higher pay	work more at same pay	work less
Argentina	37.6%	53.0%	2.3%	7.1%
Canada	55.6%	37.5%	3.2%	3.7%
USA	57.4%	36.3%	3.7%	2.6%
Australia	49.5%	40.6%	4.6%	5.2%
New Zealand	47.1%	41.5%	6.0%	5.4%
India	58.4%	36.0%	3.0%	2.7%
Malaysia	45.2%	44.7%	6.4%	3.7%
China	39.5%	51.1%	1.6%	7.9%
Hong Kong	35.9%	48.7%	2.8%	12.5%
Japan	42.0%	42.3%	1.6%	14.1%
Singapore	46.9%	41.7%	4.6%	6.9%
Portugal	45.9%	46.7%	2.8%	4.7%
Belgium	60.8%	32.8%	2.1%	4.4%
France	59.8%	34.3%	2.1%	3.8%
Netherlands	62.1%	30.1%	2.4%	5.5%
Germany	52.4%	38.4%	3.3%	5.9%
Sweden	59.2%	26.3%	3.2%	11.4%
Switzerland	57.6%	33.2%	4.2%	5.0%
UK	51.2%	39.7%	4.6%	4.6%
Italy	46.3%	45.0%	2.2%	6.6%
Spain	43.6%	46.5%	1.8%	8.1%
Hungary	44.3%	49.5%	0.9%	5.3%
Poland	62.1%	33.0%	0.6%	4.3%
Russia	47.8%	47.6%	1.1%	3.5%

what motivates employees to work more?

higher pay and promotion are main motivators to work more among both male and female workers



feelings about current work schedule

- happy with current schedule
- willing to work less
- willing to work more

motivators to work more	overall
increase income	87%
take a next step in career (promotion)	36%
fulfil potential/personal development	29%
have more influence at work	19%
develop a greater self-esteem	13%
escape from daily home activities	4%

gender

men are more driven by career opportunities, personal development and influence in their decision to work more, while women are more motivated by salary



age

younger workforce is clearly more concerned with career prospects, whereas older employees mention more often salary as a driver to work more



education

salary motivates lower educated people to work more, while employees with at least a bachelor degree are more driven by career and development



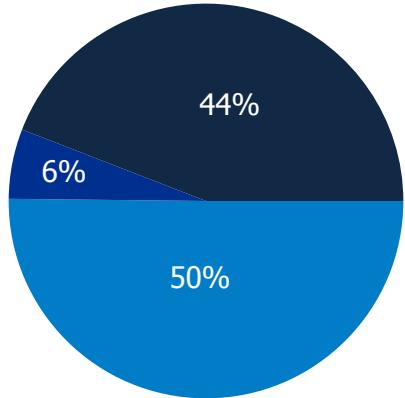
what motivates employees to work more?

increasing income is clearly the main driver to work more in all participating countries

	increase income	take a next step in career	fulfill potential/ personal development	have more influence at work	develop a greater self-esteem	escape from daily home activities
Argentina	90.3%	32.8%	25.5%	13.2%	8.6%	4.3%
Canada	85.4%	27.5%	20.1%	14.1%	8.4%	4.9%
USA	87.9%	32.1%	23.0%	16.9%	11.6%	5.3%
Australia	84.5%	26.5%	20.2%	12.8%	11.6%	5.8%
New Zealand	86.6%	25.0%	21.8%	12.3%	9.7%	6.3%
India	75.6%	54.6%	42.0%	30.1%	31.7%	5.6%
Malaysia	80.3%	44.4%	40.3%	18.7%	22.4%	5.5%
China	85.9%	50.0%	44.1%	29.6%	17.3%	2.5%
Hong Kong	83.8%	37.9%	24.2%	19.3%	11.8%	3.4%
Japan	90.4%	15.5%	19.5%	9.3%	8.8%	1.2%
Singapore	80.1%	40.9%	33.4%	19.5%	16.8%	5.1%
Portugal	91.6%	27.4%	19.3%	10.3%	4.3%	1.3%
Belgium	85.0%	29.8%	23.4%	13.2%	12.5%	3.6%
France	86.3%	19.7%	14.5%	10.0%	7.5%	2.7%
Netherlands	79.8%	25.1%	27.7%	13.9%	8.7%	2.5%
Germany	89.1%	28.2%	20.9%	16.7%	7.3%	5.2%
Sweden	85.2%	30.3%	29.5%	20.3%	14.0%	6.6%
Switzerland	79.3%	20.3%	21.1%	15.4%	7.2%	4.1%
UK	84.1%	28.3%	22.2%	14.1%	10.0%	4.4%
Italy	87.0%	37.7%	22.3%	13.3%	8.6%	3.0%
Spain	87.2%	28.1%	16.4%	11.4%	6.2%	2.4%
Hungary	96.5%	32.7%	26.0%	8.8%	15.6%	2.8%
Poland	92.4%	21.4%	18.6%	6.5%	13.4%	4.1%
Russia	95.9%	42.9%	28.6%	13.1%	11.6%	2.5%

what motivates employees to work less?

extra free time and healthier work-life balance are main motivators to work less



feelings about current work schedule

- happy with current schedule
- willing to work less
- willing to work more

motivators to work less	overall
free time for myself	70%
healthier work-life balance, less stress	66%
sports, leisure, hobbies	41%
spend more time with children	39%
care for family member/relative	23%
education, study, training	18%
start up or run own business	8%
do volunteering work (social purpose)	7%

gender

men are more motivated by extra free time for themselves and for leisure in their decision to work less, while women are more driven by balance and spending time with children



age

younger workforce more often mention the extra time for leisure and sport as a reason to work less, while older people are more motivated by balance



education

employees with a bachelor degree are clearly more motivated than other employees by spending time with children, family care and extra time for leisure and sport

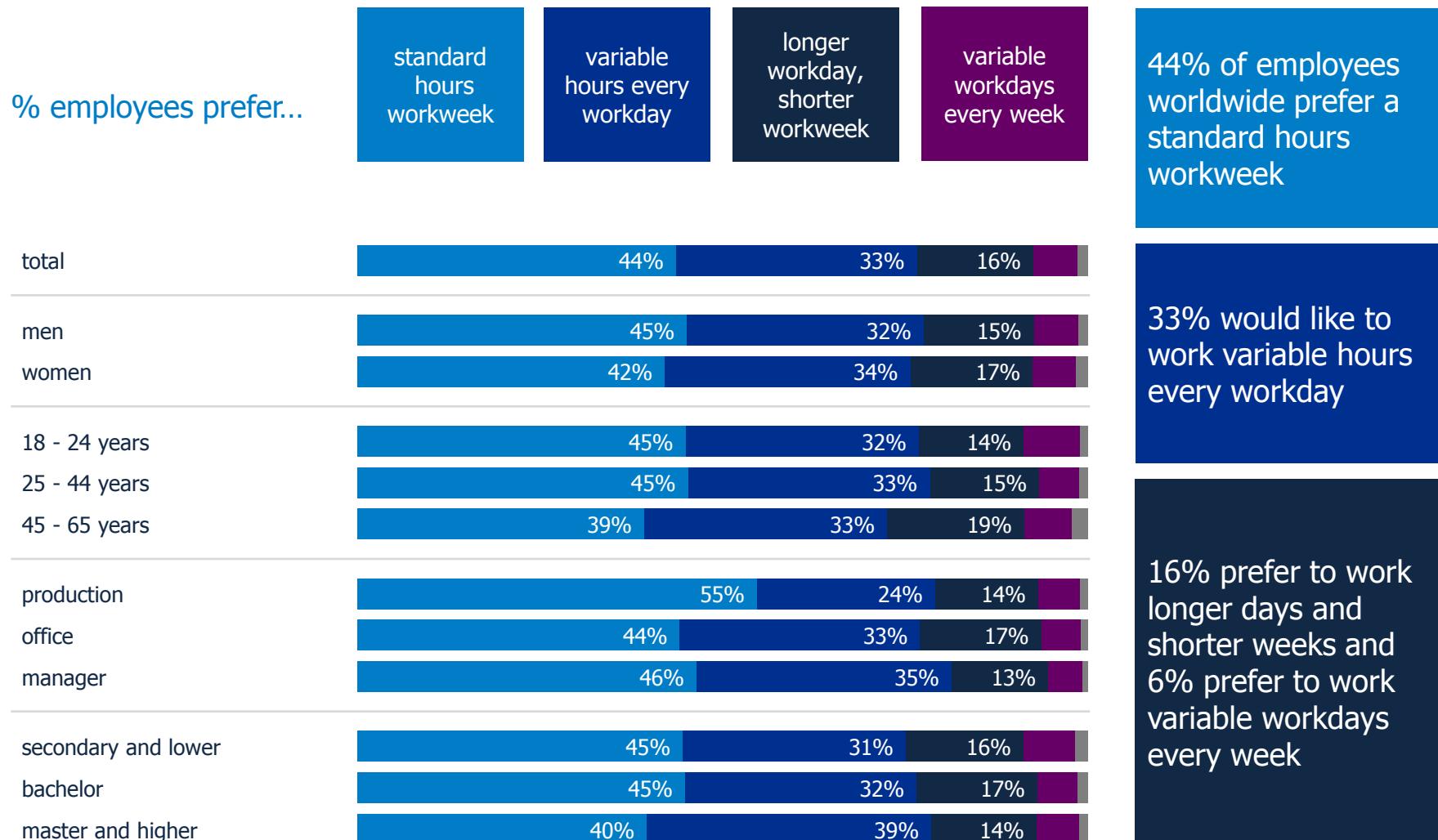
what motivates employees to work less?

extra free time and balance are the main drivers to work less in all participating countries

	free time for myself	healthier work-life balance, less stress	sports, leisure, hobbies	spend more time with children	care for family member/relative	education, study, training	start up or run own business	do volunteering work
Argentina	54.4%	68.3%	37.8%	47.4%	6.8%	40.9%	23.7%	10.1%
Canada	66.5%	68.5%	32.8%	35.9%	17.9%	14.9%	7.0%	9.0%
USA	59.6%	58.5%	42.0%	65.3%	14.3%	19.6%	8.8%	11.5%
Australia	65.3%	68.1%	36.6%	31.9%	16.7%	14.0%	11.2%	13.6%
New Zealand	59.8%	70.5%	38.6%	40.9%	9.0%	19.5%	14.9%	17.6%
India	54.1%	61.4%	32.8%	41.9%	51.5%	22.0%	16.3%	11.9%
Malaysia	75.2%	73.9%	30.7%	53.6%	47.9%	18.9%	19.3%	14.7%
China	75.4%	72.7%	52.7%	41.3%	36.6%	25.3%	9.8%	6.1%
Hong Kong	78.9%	69.3%	50.9%	27.7%	44.8%	27.4%	8.8%	8.9%
Japan	75.0%	58.0%	28.5%	17.9%	12.1%	6.9%	5.5%	1.9%
Singapore	66.7%	65.9%	36.7%	40.1%	38.3%	14.8%	9.5%	15.9%
Portugal	49.6%	70.3%	30.2%	39.3%	12.1%	17.5%	9.9%	11.1%
Belgium	64.5%	64.9%	27.1%	40.0%	16.7%	12.3%	7.9%	9.5%
France	66.8%	55.1%	31.3%	40.4%	23.2%	10.3%	4.2%	5.8%
Netherlands	67.9%	62.0%	24.7%	29.1%	9.4%	9.7%	4.7%	8.4%
Germany	68.5%	72.9%	42.0%	36.9%	9.0%	15.4%	3.9%	9.6%
Sweden	62.2%	66.4%	37.6%	47.9%	28.6%	27.3%	6.9%	9.2%
Switzerland	75.5%	68.3%	52.8%	25.9%	18.6%	21.6%	10.0%	11.4%
UK	60.8%	64.3%	24.4%	33.8%	17.1%	8.8%	3.5%	5.5%
Italy	73.6%	57.7%	38.2%	44.2%	15.7%	16.3%	7.3%	11.1%
Spain	68.8%	64.6%	37.0%	47.0%	12.3%	22.6%	5.3%	2.8%
Hungary	63.2%	70.2%	49.3%	53.1%	15.6%	27.5%	15.5%	7.5%
Poland	55.8%	53.8%	36.6%	34.8%	11.8%	17.1%	8.5%	3.3%
Russia	61.3%	71.5%	36.2%	43.6%	39.6%	13.1%	14.0%	4.3%

are flexible work schedules becoming the rule?

33% of employees worldwide would prefer variable working hours every day



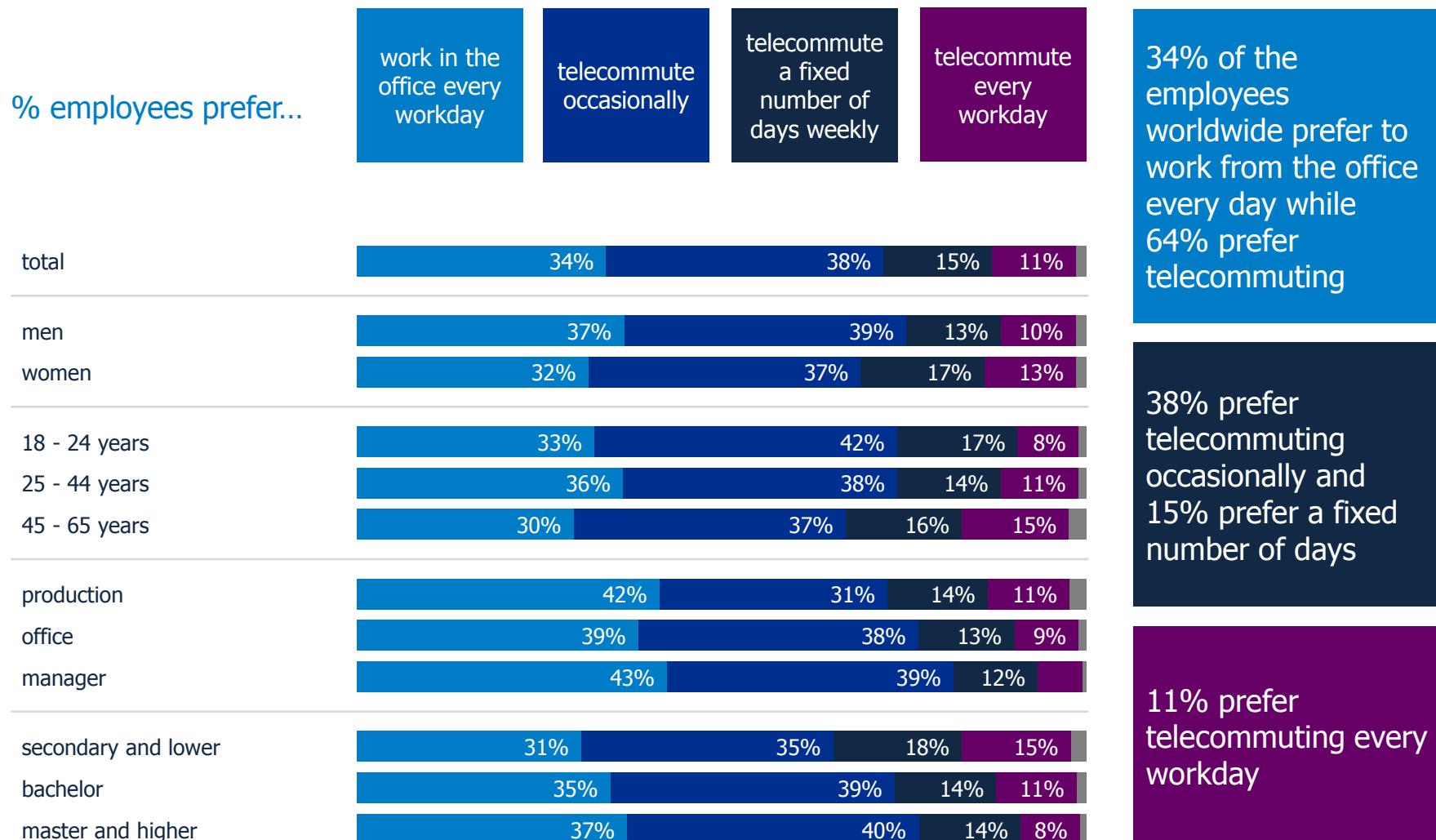
are flexible work schedules becoming the rule?

employees in Sweden and Switzerland are least willing to work in a standard hours week

	standard hours workweek	variable hours every workday	longer workday, shorter workweek	variable workdays every week
Argentina	38.7%	33.9%	16.3%	7.9%
Canada	44.3%	29.9%	18.3%	5.4%
USA	48.2%	28.8%	16.5%	4.8%
Australia	38.9%	34.5%	17.3%	6.8%
New Zealand	41.8%	32.7%	16.2%	5.8%
India	50.4%	36.9%	8.4%	3.9%
Malaysia	40.4%	39.2%	14.1%	5.4%
China	50.6%	30.0%	13.3%	5.5%
Hong Kong	35.5%	46.6%	15.1%	2.7%
Japan	43.5%	31.5%	15.9%	8.4%
Singapore	34.9%	44.5%	15.3%	4.5%
Portugal	37.0%	33.1%	18.3%	9.8%
Belgium	37.3%	36.0%	17.5%	6.9%
France	35.5%	32.3%	25.0%	5.7%
Netherlands	34.5%	40.3%	12.6%	9.8%
Germany	33.6%	41.5%	15.8%	7.6%
Sweden	28.1%	44.5%	14.7%	11.0%
Switzerland	27.9%	45.6%	16.7%	7.3%
UK	42.0%	34.2%	15.4%	6.4%
Italy	31.4%	44.5%	15.6%	7.1%
Spain	37.8%	36.3%	15.8%	7.4%
Hungary	32.6%	39.5%	14.5%	11.4%
Poland	39.2%	38.2%	13.8%	7.9%
Russia	37.0%	35.9%	19.8%	5.4%

telecommuting, benefit or burden?

64% of the surveyed employees worldwide want to work remotely at least occasionally



telecommuting, benefit or burden?

employees in Poland, Argentina, Spain and Russia are most willing to telecommute

	work in the office every workday	telecommute occasionally	telecommute a fixed number of days weekly	telecommute every workday
Argentina	24.3%	38.2%	22.6%	13.7%
Canada	32.7%	33.3%	14.7%	17.1%
USA	34.6%	30.9%	15.5%	17.1%
Australia	34.9%	35.6%	14.9%	12.2%
New Zealand	26.9%	39.7%	15.9%	13.9%
India	47.4%	33.7%	12.3%	6.0%
Malaysia	28.3%	49.6%	14.3%	7.1%
China	36.9%	49.1%	10.7%	3.2%
Hong Kong	36.4%	43.6%	14.3%	5.4%
Japan	40.1%	33.9%	15.3%	10.4%
Singapore	26.3%	50.4%	14.1%	8.7%
Portugal	23.4%	46.8%	17.9%	11.0%
Belgium	28.6%	40.9%	19.0%	9.3%
France	34.6%	35.0%	16.6%	12.2%
Netherlands	25.5%	46.2%	18.2%	6.6%
Germany	29.6%	41.9%	16.2%	10.3%
Sweden	32.1%	45.9%	12.2%	6.1%
Switzerland	28.1%	43.9%	17.6%	8.5%
UK	34.9%	33.9%	14.4%	14.4%
Italy	30.5%	38.8%	19.3%	9.9%
Spain	24.4%	45.0%	18.3%	11.3%
Hungary	25.9%	42.0%	14.0%	15.7%
Poland	23.7%	50.9%	15.9%	8.8%
Russia	24.8%	42.4%	18.8%	13.0%

summary



drivers for choosing an employer

how is the current economic climate reflected in people's choices?

- Regarding the most important criteria worldwide when choosing to work for an employer, **no remarkable shifts** are observed since 2015: looking at the factor that was most often selected by people in their individual top 5 rankings, **salary & employee** benefits remains value number one before long-term **job security**, which lost its top position once the world economy started to recover from the impact of the 2008 financial crisis.
- Although salary remains the most or one of the most important criteria in all countries, it seems like people are starting to consider more various factors when looking for a job, while previously they used to focus more on major elements like salary and job security. As in 2015 **Europe remains the most progressive region** when it comes to prioritizing soft values. Indeed, factors like atmosphere, work-life balance and flexible working arrangements remain clearly more important in Europe than in other continents. On the other side of the spectre is **Russia** where traditional values like salary (despite significant declining scores), career opportunities and financial health are considered more important than in other continents. The latter two aspects have become even more important compared to last year.
- The better the economic climate, the more critical employees and job seekers become in selecting suitable jobs that fit with their personal life styles. **Worldwide, economic recovery has started** and is projected to strengthen gradually in the future. On the other hand, **many uncertainties remain** (i.e. oil prices, geopolitical tensions, the impact of asylum seekers on the labour market, etc.). **This ambiguity is reflected in the survey results**. Overall, results tend to be fairly optimistic, especially in countries which have been less severely impacted by the great recession. In regions that have suffered from the latest economic downfall (especially Southern Europe and CIS), however, participants appear to be much more cautious, prioritizing job security, financial stability and salary as most important criteria when choosing an employer.

drivers for choosing an employer (continued)

how is the current economic climate reflected in people's choices?

- In the Americas, **the US** has been hit hard by the financial crisis, but the world's leading economy recovered quite well. The US is expected to accelerate its growth in 2016, job creation is back on track and employer confidence increased. This is confirmed by the findings in our research: although the decreasing trend in importance rates for salary and job security has not been confirmed this year, we observe that **training opportunities** and **flexible working arrangements** become more and more important and that **pleasant atmosphere** and **work-life balance** remain key factors.
- Forecasts are **less positive in other leading economies**, such as China, Russia and to a lesser extent Japan. In these countries we can see that **salary** remains the most important factor but decreases in importance to the benefit of **aspects related to stability** (i.e. financial health and job security). People in these countries less prioritize soft values, but are more concerned with **personal development** since career prospects and/or training opportunities show increasing importance rates. Lifetime employment is no longer dominating the labor market in Japan. With a shortage of skilled workers because of declining birth rates, organizations have to build a strong employer brand to attract the talent they need. This can be achieved by promoting career and development opportunities as well as a pleasant company atmosphere, without neglecting (potential) employees' need for good salary and stability.
- Overall, people **expect their salary to be in line with their responsibilities**, although it is certainly not the sole driver when looking for a job. Competitive salary is **not always a factor nor an everlasting motivator**. A more realistic and beneficial approach for companies is to look into possible additional benefits that align with the true motivators of their workforce.

how do employees perceive their work schedule?

employees in countries who are least satisfied with their current working schedule are more willing to work harder at a higher pay

- Overall, we observe that about half of the surveyed participants worldwide are **satisfied with their current working schedule**. Most participants who are not satisfied with their current schedule, would like to **work more at a higher pay**. Only few respondents are willing to work less at a lower pay or to work more at the same pay. It should be noted, however, that opinions strongly vary between countries and zones.
- People in **Europe** and in **Northern America** are clearly most satisfied with their current working schedule, while staff in **Hong Kong, China and Argentina** are least satisfied with their working time. At the same time, employees in the latter three countries are clearly more willing than employees in most other countries to work more in return of a higher salary. Along with employees in Malaysia and Singapore, these employees already work significantly more than they are supposed to. These hard workers are willing to do whatever it takes for their employer but expect **autonomy, salary and career opportunities in return**.
- Although overall relatively few people are **willing to work less and earn less**, it is striking that in the same countries as above (Argentina, China, Hong Kong) a significant higher proportion of employees wants to reduce the number of hours they currently work. This means that the sample of people who are least satisfied with their current working schedule is composed **by two main groups**: a large group who wants to work even more and a smaller group willing to work less. Scores in both groups are significant higher than the total means in the respective groups. We also find relatively high proportions of employees who prefer to work less and earn less in Sweden, Spain, New Zealand and Australia.
- Despite salary being the main motivator to work more in all countries, employees in Argentina, Japan, Hungary, Poland and Russia, clearly focus more on this than people in other countries. It is not surprising that most of these countries have been severely impacted by the **great recession** or are currently facing an **economic downturn**. **Career prospects** is the second most important motivator to work more and is more frequently mentioned by employees in India, Singapore and Russia.

are flexible work schedules becoming the rule?

conservative profiles (USA, Canada) vs. progressive profiles (Sweden, Switzerland, Germany) in terms of flexibility

- Overall, 44% of the surveyed employees worldwide prefer a **standard workweek**. This means that more than half of our sample would prefer **some form of flexibility**. Indeed, one out of three of the participants would prefer variable hours every workday. Considerably less participants prefer longer workdays and shorter workweeks (16%) or variable workdays every week (6%). Again, opinions strongly vary between countries and zones.
- People in **India, China, the USA and Canada** appear to be most conservative when it comes to flexibility since significantly more employees in these countries want to work in a standard workweek. Employees in **Sweden, Switzerland and to a lesser extent in Italy, Germany and Hungary** are most in favor of flexible working schedules. Countries in North-America seem to be more conservative not only in terms of flexibility, but also in terms of working time (cfr. supra). They have an different profile as countries like Sweden, Switzerland and Germany who are more progressive.

telecommuting, benefit or burden?

telecommuting in return for hard work (Japan, China, Russia, Hungary) vs. telecommuting as a factor to receive added value (Western and Northern Europe)

- Overall, a minority of the surveyed employees worldwide prefer to **work in the office every day** (34%). This means that most people worldwide would prefer **some form of telecommuting**. Most of them would prefer to telecommute only **occasionally**, while 15% are willing to telecommute a fixed number of days weekly and 11% on a **structural basis**.
- Employees in **Japan, China, Hong Kong and India** are more than people in other countries inclined to work in the office every day, while staff in **Argentina, Russia, Poland, Hungary and Portugal** are most in favor of telecommuting. This corroborates the earlier finding that hard workers (both in Asia and former European crisis countries) expect some form of autonomy in return for the many hours they spend working. The difference between countries in Asia and Central Europe is that the Central European hard workers are more likely to be motivated by **securing their future and job**, while Asian hard workers are more driven by **making career**.
- **Western European countries** are also progressive towards telecommuting, but these employees are more driven by the need to accomplish a healthy work-life balance. They focus more on soft values (atmosphere, balance, flexibility) and seek **added value** and jobs that do not interfere with their personal agendas.

appendix: Randstad Award



survey design

main survey

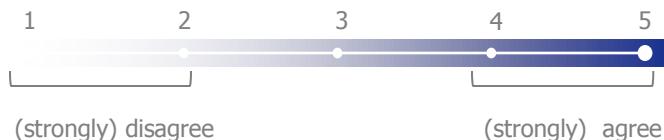
01 what attributes are important to you when choosing to work for a company?

respondents rank their top 5 attributes, in order of most to least important, from a list of 17 choices

02 which of the following companies do you know?

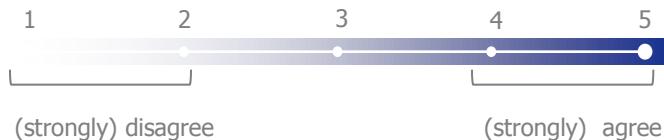
respondents select companies they know from a random list of 30 companies per respondent

03 based on your perception of this company, would you like to work for it?



04 do you think this company performs well on these attributes?

salary and employee benefits
career progression
work atmosphere
long-term job security
work-life balance
financial health
job content
training
management
environment and society (CSR)



a random list of companies is shown to all respondents with the question: 'do you know this company?'

next, only those who know the company are asked: 'would you like to work for this company?' = question that determines the most attractive employer

next, the respondents rate each company on 10 functional attributes

an annual award is granted to recognize the most attractive employer

survey design

additional insights

01 how many hours per week do you have to work according to your current employment contract/agreement?

02 how many hours per week do you actually work, any type of overtime included?

03 how do you feel about your current work schedule?

- I am happy with the work schedule I currently have
- I am willing to work more hours if I receive additional pay
- I am willing to work more hours even if I do not receive additional pay
- I am willing to work fewer hours, but also earn less

04 for what reasons would you like to work less hours per week?

respondents select multiple options from a list

05 for what reasons would you like to work more hours per week?

respondents select multiple options from a list

06 how do you feel about flexible hours and the ability to choose your working hours yourself?

- standard workweek with the same work hours every day
- work different hours every workday at my convenience
- work less days in a week and more hours in a day
- work more days in a week and have more time off another week

07 how do you feel about working remotely?

- work in the office
- work remotely occasionally when more convenient
- work remotely a fixed number of days per week
- work remotely all the time

survey design

local sectors vs global sectors

local sector

1. number of local sectors depends from top 150/75 per country (between 8 and 22 sectors)
2. local sectors are assigned to the companies by the countries. ICMA does check the assigned local sectors. There have to be at least 3 companies in one sector, otherwise the sector is combined with another sector

global sector

1. there are fix 15 global sectors
2. global sectors are assigned to the companies by ICMA/randstad holding

Overall conclusions:

- each company per country is assigned to a local sector as well as a global sector.
- local and global sector are defined independently from each other, they do not necessarily correspond (e.g. Swatch in Switzerland sits in locally defined sector “watchmaking industry” and in globally defined sector “industrial”).

description of online respondents

gender

men	93,781
women	102,412



age

18 - 24 years	26,297
25 - 44 years	109,964
45 - 65 years	59,932



196,193 (potential) employees aged between 18 and 65

based on respondents' perceptions of the largest employers in 25 countries

interviews conducted online between September and December 2015

study

secondary and lower	69,975
bachelor	73,063
master and higher	51,649



level

production	17,650
office	69,718
manager	33,758



description of online respondents

details

sector	function	region
agriculture, forestry, fishing	commercial, marketing	Belgium
automotive	economist, consultant	France
construction	education	The Netherlands
finance	engineer, architect	Germany
FMCG	finance, insurance, accounting	Poland
human resources	government worker	Spain
industrial, manufacturing	HR, recruitment officer	UK
information technology (IT)	IT specialist	Italy
consulting	legal	Australia
mining and resources	life science professional	New Zealand
non-profit	logistics worker	India
public administration	health occupations	Japan
education	production, manufacturing	Singapore
life science, pharmaceutical	purchasing	Canada
chemical	administrative	USA
power/utilities/telecom	services	Argentina
real estate or rental and leasing	social, community service	Hong Kong
retail trade	other	China
wholesale trade		Switzerland
services		Hungary
media		Sweden
transport, logistics warehousing		Russia
travel, leisure, hospitality		Portugal
other		Malaysia
total 130,768	total 130,768	total 196,193

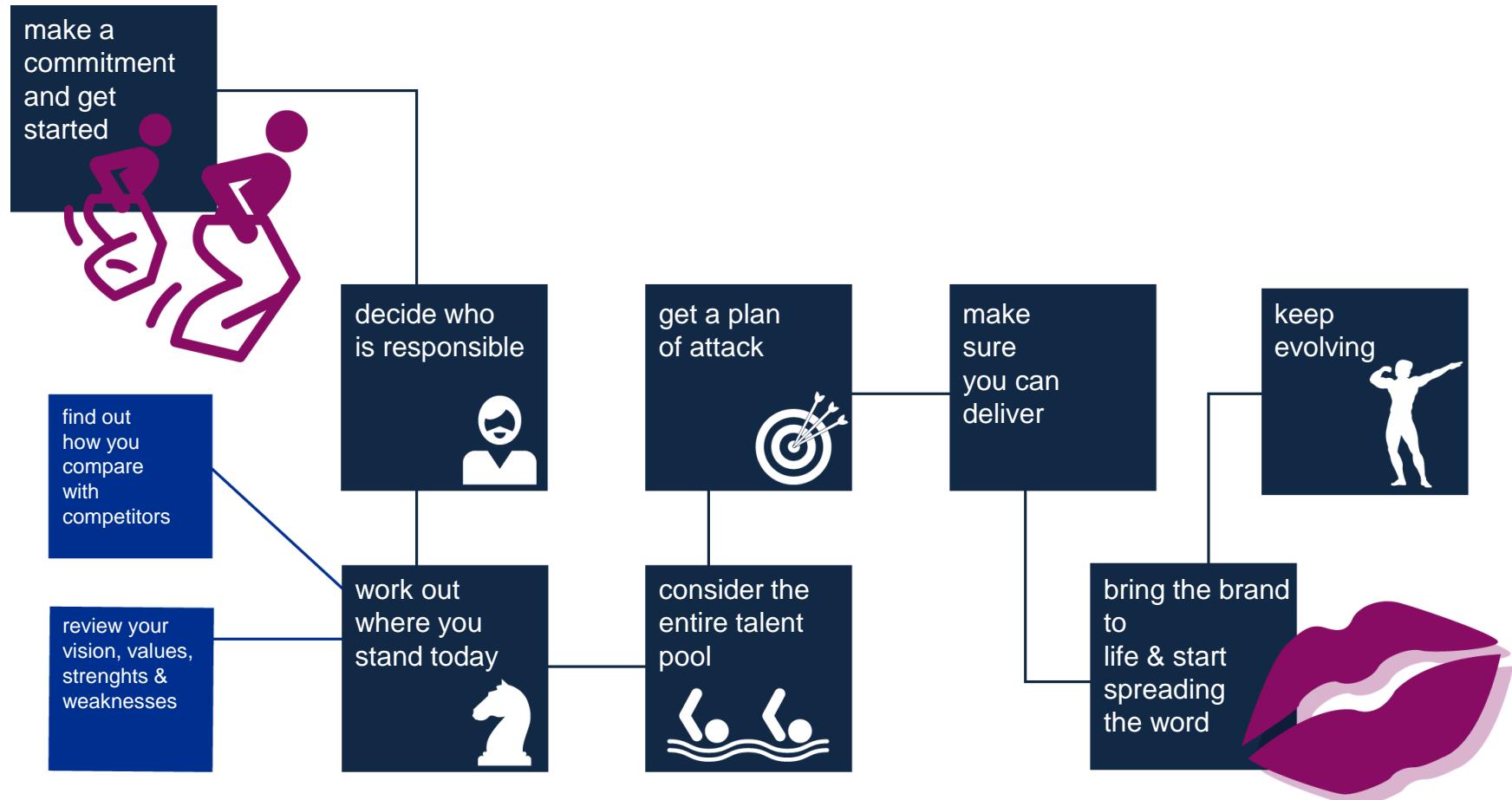


employer branding



improve your pulling power

a step-by-step guide to building a powerful employer brand



5 tips for building a stand-out employer brand

1. it's a strategy, not a task: often organizations mistake employer brand building as a specific task such as planning a social network campaign. But, it's a long-term strategy, so make sure you approach it with a clear vision in mind.

2. clearly define your EVP: defining the employee value proposition requires a clear understanding of your corporate values and culture, and the drivers and motivators of your employees. Make sure you take the time to invest in internal and external stakeholder feedback.

3. assign ownership: who is responsible for employer branding? Make sure your organization is clear on who is the ultimate owner — and most often it needs to be led by the CEO throughout all levels of the company.

4. apply and measure: once you have developed a strategy, make sure you measure your branding efforts and assess the results to ensure you are on the right track.

5. ask the experts: if you don't see the results you desire or are not even sure how and where to get started, consider bringing in external employer branding expertise to help identify the gaps.

securing the budget

how can you secure the budget to allow you to start an EVP project? Business leaders will expect a measurable set of returns – the more clearly they are defined, the greater the chance that senior management will sign off. Therefore your EVP should focus on the attraction and engagement piece – the area that will give you a return on investment (ROI).

example EVP ROI

- increase career site visits
- size of candidate pipeline
- number of social media followers/likes
- career sites applications/% conversion
- increase in referrals
- offer to acceptance ratio
- number of hires made via direct sourcing
- decrease time to hire
- decrease cost of hire/recruiting costs
- new hire satisfaction
- number of hires exceeding probationary period
- increase retention
- diversity fulfillment

interesting facts on employer branding

Source: 2016 Randstad Sourceright Talent Trends Survey

67%

of HR leaders rate their organizations' ability to attract talent as good or excellent

53%

think this is because of their strong reputation/ employer brand

74%

of employers plan to enhance their candidate experience

82% are more focused on building their employer brand than two years ago



top 3 areas of investments in candidate experience

1. conducting training for hiring managers

2. improving internal and external communications standards and feedback mechanisms

3. improving the jobseeker experience on the careers websites