

global summary report 2014



randstad award

good to know you

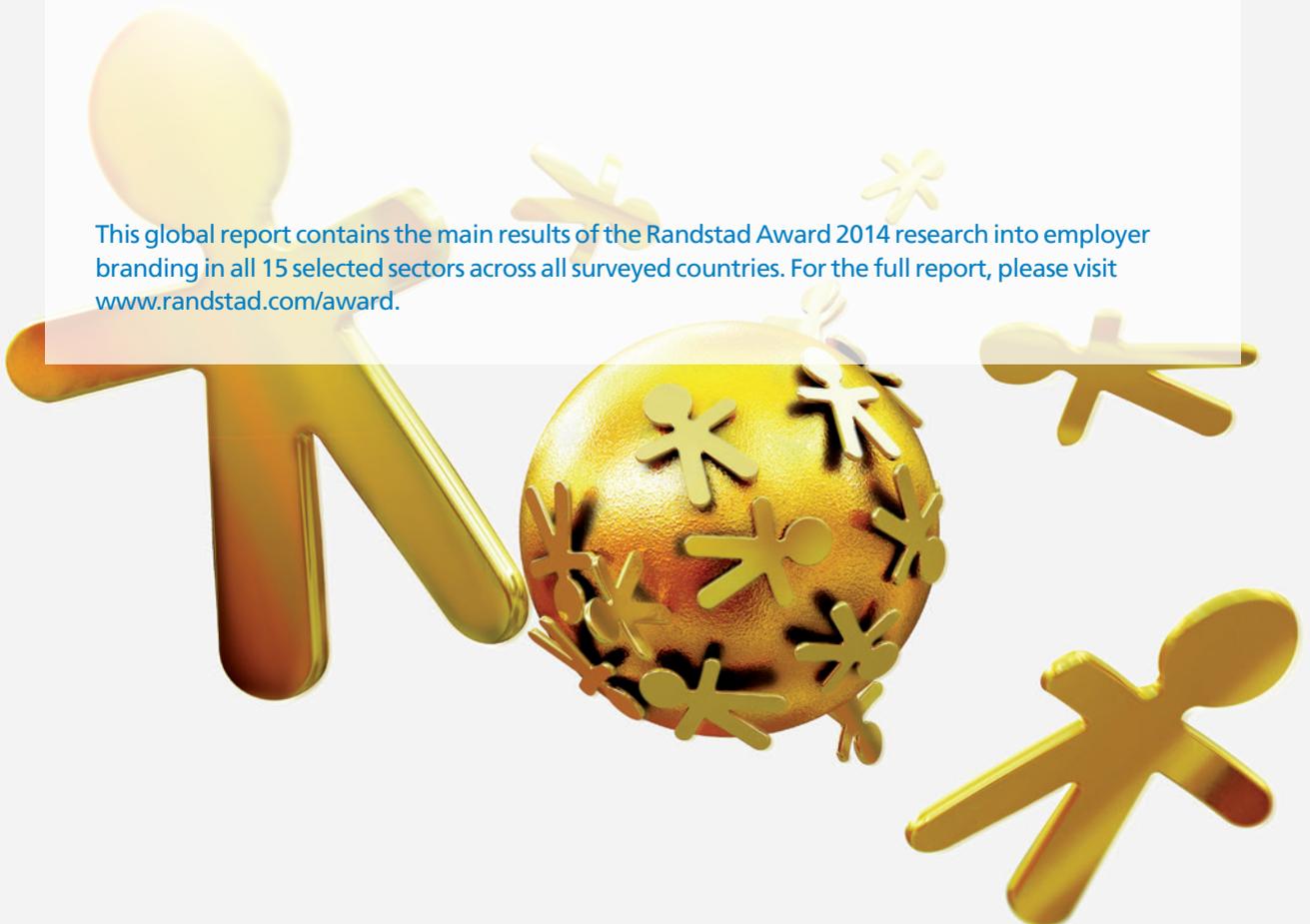
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This global report contains the main results of the Randstad Award 2014 research into employer branding in all 15 selected sectors across all surveyed countries. For the full report, please visit www.randstad.com/award.



1 about the Randstad Award

background and survey design

A company's success hinges on the quality of its employees, and in today's highly competitive job market, employer branding is a crucial tool for attracting and retaining the right kind of talent. A strong employer brand image raises your visibility in the job market and makes you stand out from the competition, helping you to recruit highly skilled and promising new employees. It also encourages existing employees to identify with your company, enhancing their motivation, engagement – and productivity. In order to strengthen your employer brand, however, you need to have insight into how your organization and your sector are perceived by potential employees and the public at large. In addition, you need to understand the general preferences and priorities of jobseekers in your sector and country.

the Randstad Award

The Randstad Award was created to provide employers with precisely these kinds of insights. Started in Belgium in 2000, the Randstad Award has grown into the world's largest survey into employer branding, capturing the views of some 200,000 people. In each of the 23 participating countries across Europe, Asia/Pacific and the Americas, a representative sample of employees and job seekers between the ages of 18 and 65 are asked (online) about their perceptions of their country's largest companies in 15 selected sectors.

participating countries:

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

selected sectors:

Automotive, Chemical, Construction, Consulting, Financial Services, FMCG, Hospitality, Industrial/ Manufacturing, IT, Life Sciences, Logistics, Power& Utilities, Retail, Services and Technology

definitions

In this study, a number of terms are used that may require some explanation.

name awareness

The respondents are asked to identify the companies they recognize, that is, those they know enough about to have an opinion about them. The result is a measure of what we call 'name awareness'.

attractiveness

Respondents are then asked whether or not they would like to work for those companies that they know. They then evaluate the relative attractiveness of each of the selected companies and sectors based on 10 key factors, including financial health, long-term job security, good work/life balance, and interesting job content. Unlike similar surveys, HR officers, staff members or experts are not invited to take part, which guarantees maximum independence and objectivity.

The survey makes a clear distinction between 'absolute attractiveness' and 'relative attractiveness'. A smaller, lesser-known company may actually be a more appealing potential employer than a larger, well-known company – but based on absolute attractiveness, the high-profile organization would rank better in the ratings due to greater public awareness. To make sure that a small company's ranking is not impacted adversely by its brand awareness, the Randstad Award distinguishes between absolute attractiveness (among all respondents) and relative attractiveness (among respondents who know the company). By applying this methodology uniformly across all countries, we are able to draw useful comparisons between companies, sectors and countries.

types of respondents

Participants in the survey are divided into 'global respondents', 'sector employees' and 'sector advocates', based on the intimacy of their relationship with the sector under analysis. Global

respondents are people who are employed in any sector (they are sometimes referred to as 'all respondents'. Most of them will be working in a sector other than the one being assessed. As a group they therefore have a relatively objective view of the sector. Sector employees, as the name suggests, are, however, themselves employed in the sector. They know its good points – and its bad points. Sector advocates, finally, are people who are not employed in the sector but would like to work for one or more companies in the sector. Their responses are often more 'extreme' or lack the nuance that sector employees demonstrate.

reports

This global report summarizes the main results for all 15 selected sectors across all surveyed countries. Sector reports are available for IT, Life Sciences, Automotive and FMCG. Company reports, which detail the strengths and weaknesses of individual companies and provide an excellent industry benchmark, are available to the companies being surveyed. Together, these reports convey vital information on employer branding and job seeker preferences that can help employers worldwide to strengthen their employer brand image and attract and retain the people they want.

the sample

The total sample used in the survey consisted of almost 200,000 people, approximately half of whom were men (47%) and half women (53%). In terms of age, the sample contained a majority of people in the 25-44 year age range (56%). This reflects the preponderance in the intermediate group of people in work. Indeed, the proportions of the other two groups (18-24 years: 14%; and 45-65 years: 30%) may be said to reflect the proportions in the working population in many countries.

The fifteen sectors were examined in the context of four different regions: the Americas, Asia-Pacific (APAC), Russia and Europe.

description of online respondents: global

	respondents	%
global sample	195,018	100%
gender		
men	90,771	47%
women	104,247	53%
age		
18-24 years old	26,457	14%
25-39 years old	109,413	56%
40-65 years old	59,148	30%
education		
higher education (master)	63,516	33%
higher education (bachelor)	59,178	30%
secondary education and lower	70,747	36%
no diploma/other	1549	1%



description of online respondents: Americas, APAC & Russia

	respondents	%
global sample	195,018	100%
Americas	28,074	14%
Argentina	8,005	4%
Canada	8,520	4%
USA	11,549	6%
APAC	54,422	28%
Australia	9,526	5%
China	8,561	4%
India	8,015	4%
Japan	8,511	4%
Hong Kong	6,254	3%
New Zealand	7,009	4%
Singapore	6,546	3%
Russia	8,527	4%



description of online respondents: Europe

	respondents	%
global sample	195,018	100%
Europe	103,995	54%
Belgium	14,842	8%
France	12,027	6%
Germany	8,000	4%
Hungary	5,504	3%
Italy	8,001	4%
Luxembourg	1,036	1%
Netherlands	13,501	7%
Poland	8,004	4%
Spain	8,054	4%
Sweden	8,001	4%
Switzerland	7,810	4%
UK	9,215	5%



2 global results

2.1 global insights

image of employer brands improves

This year's survey showed that, globally, the image of employer brands has become more positive over the past year, increasing by an average of 4% worldwide. The improvement was particularly noticeable in China, the USA, Belgium and France, where the image improved by 6%. These countries were followed (at 5%) by Australia, Italy, Singapore, Spain, Netherlands and the UK. Employer images remained largely stable in Germany and New Zealand, however, while in Canada, India and Poland the improvement was, at 2%, less than average. This general upturn in the image of employers may reflect potential employees' optimism about the economic recovery.

good working atmosphere and interesting job content

More than in other countries, people in the Netherlands and Switzerland said they valued a good working atmosphere in an employer. People in Japan attached most value to interesting job content.

economic upturn may also explain why salary & employee benefits is now top priority before job security; honesty, security & reliability are most important symbolic values

functional values show remarkable shift worldwide; symbolic values show similar patterns in countries



worldwide more positive image of employers may reflect potential employees' optimism about the economic recovery

In almost all countries, the attractiveness of the employer brands has risen considerably

country (*)	attractiveness of employer brands
Argentina	+4%
Australia	+5%
Belgium	+6%
Canada	+2%
China	+6%
France	+6%
Germany	-2%
Hong Kong	+3%
India	+2%
Italy	+5%
Japan	+3%
New Zealand	-1%
Poland	+2%
Singapore	+5%
Spain	+5%
The Netherlands	+5%
UK	+5%
US	+6%

- attractiveness of employer brands increased by 4% worldwide
- steep increase of 6% in China, US, Belgium and France
- attractiveness rather stable in Germany and New Zealand

more interest in salary and employee benefits, less in job security

The economic upturn may also explain why people now tend to see salary and employee benefits as their #1 interest when considering an employer, taking over the lead from job security. By contrast, they consider matters such as corporate social responsibility, diversity management and the latest technologies as less important.

symbolic or 'soft' values

This year, for the first time, the survey asked respondents about the symbolic or 'soft' values they valued in an employer brand. These were expressed in terms of 'personality traits'. They covered a wide spread: ethical qualities (such as 'reliable' and 'honest'), intrinsic qualities (such as 'sincere', 'intelligent', 'down to earth', 'strong', 'secure' and 'robust'), social qualities (such as 'well respected', 'highly regarded', and 'high status'), and emotional qualities (such as 'exciting', 'thrilling', 'daring' and 'masculine'). The symbolic values that were considered to be the most important in 17 of 23 countries were 'honest' and 'reliable'. The top value in China and Hong Kong was 'strong', while in Russia top value was attached to 'intelligent'. The traits least highly valued worldwide were the emotional qualities ('exciting', 'thrilling', 'daring' and 'masculine').



2.2 functional attributes or 'hard values'

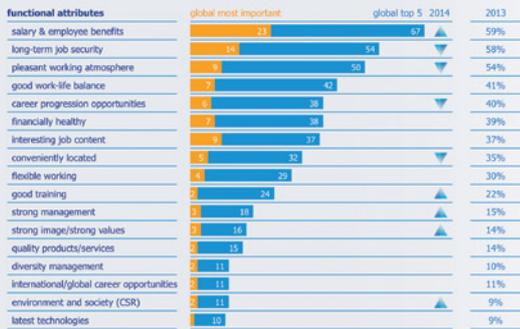
Looking at the Top 5 'hard' values ranked by all respondents, the order is the same as in 2013, but the levels of importance have changed. 'Salary and employee benefits' rose by 8% from 59% in 2013 to 67% in 2014. 'Long-term job security' and 'pleasant working atmosphere' both lost 4%, and 'good work/life balance' and 'career progression opportunities' lost 1% and 2% respectively. Other significant changes can be observed in 'conveniently located' (-3%), 'good training' (+2%), 'strong management' (+3%), 'strong image/strong values' (+2%), and CSR (+2%).

People in Europe especially value long-term job security (58%), a pleasant working atmosphere (55%), good work/life balance (45%), interesting job content (42%) and flexible working hours (33%). They have a less than average interest in good training, strong management, and strong image/values. In all this, they contrast strongly with people in APAC, who attach more than average importance to strong management and strong image/values. People in APAC are also more interested in global career opportunities and innovative technologies.

In general, one could say that atmosphere is more valued in Europe, strong management and image in APAC, training in the Americas and international career in Russia and APAC.

globally, salary is now significantly more important than long-term job security which drops in importance compared to last year

what is the most important criterion to you when choosing an employer?
what is your top 5 of most important criteria when choosing an employer?



salary more important in Russia & Americas, job security in Europe; strong management/image & global career most valued in APAC

what is your top 5 of most important criteria when choosing an employer?



regional differences

People in Russia attach most importance to salary and employee benefits (74%), as do those in the Americas (70%). Russians also have a more than average interest in attributes such as financial health (49%), interesting job content (45%), as well 'comfort' factors such as convenient location (34%) and flexible working hours (32%). Interestingly, in Russia, financial health and interesting job content rank even higher than job security (44%) and a pleasant working atmosphere (36%).

functional attributes by country

the Americas

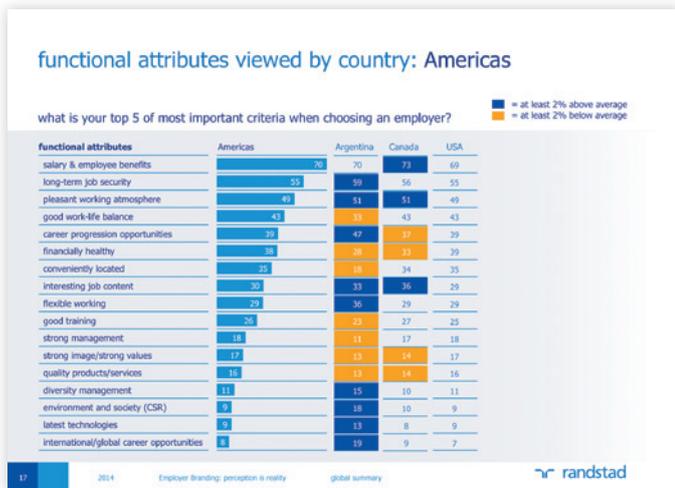
Examining functional attributes per country, we see that, in the Americas, salary and employee benefits are of above-average importance in Canada (73%), whereas in Argentina aspects such as long-term job security are found more attractive than in the USA or Canada. Argentinians also like a whole range of intangible attributes, such as a pleasant working atmosphere, career progression opportunities (including international opportunities), interesting job content, flexible working, diversity management, and care for the environment and society, as well as the latest technologies. Matters such as strong management, image and quality are of less than average interest in Argentina. Canadians attach above-average importance to a pleasant working atmosphere and interesting job content. Generally, Americans do not diverge much from the global respondents in determining the most important functional attributes when choosing an employer.

Interestingly, people in Hong Kong and India are more or less looking for the same attributes in an employer. They seem to be less interested than others in attributes relating to the job itself (rather than the employer), such as salary and benefits, job security, and a pleasant working atmosphere, good work/life balance, and so on. Their preference would seem to be for good training, strong management, strong values, quality products and services, international global career opportunities as well as environment and society and the latest technology. Indians also attach above-average importance to a company's financial health.

The preferences of Australians and New Zealanders seem to complement those of people from India and Hong Kong, in that, after long-term job security (Australia) and salary and employee benefits (New Zealand), they show a less than average interest in many of the attributes that were shown to be attractive to people from India and Hong Kong, such as strong management, strong values, quality products and services, international global career opportunities as well as care for the environment and society and the latest technology. Both Australians and New Zealanders attach above-average importance to a pleasant working atmosphere, interesting job content and flexible working hours. In addition, Australians value a convenient location and diversity management, while New Zealanders appreciate good training opportunities.

The Japanese value a good salary and employee benefits, and also a pleasant working atmosphere and interesting job content, even more so than long-term job security and a good work/life balance. They appreciate a convenient location and flexible working hours, but show, in general, a less than average interest in other attributes.

Singaporeans especially value a good work/life balance, even more than long-term job security and a pleasant working atmosphere. In line with this, they also like flexible working hours. Like many Asians, they also prefer a company with strong management. Not surprisingly, given their country's history and location, they also like a company that offers them international career opportunities. They also value good diversity management.



APAC

In APAC, we see that salary and benefits are particularly valued in China, where career progression opportunities and a financially healthy organization with a strong image and values are also important. The Chinese are also interested in training and career opportunities and their company's financial health. They like a company with strong image/values and which cares for the environment and society.

functional attributes viewed by country: APAC

what is your top 5 of most important criteria when choosing an employer?

functional attributes	APAC	Australia	China	Hong Kong	India
salary & employee benefits	66	41	70	43	47
long-term job security	50	56	51	46	40
pleasant working atmosphere	43	50	43	46	36
good work-life balance	43	47	41	35	36
interesting job content	38	41	25	33	26
career progression opportunities	38	32	51	37	34
financially healthy	36	34	41	32	38
conveniently located	30	36	32	36	26
flexible working	25	33	19	22	22
good training	21	25	28	31	28
strong management	21	20	24	36	32
strong image/strong values	19	13	22	26	22
quality products/services	16	11	15	21	23
international/global career opportunities	13	9	13	27	27
environment and society (CSR)	12	10	15	16	20
latest technologies	12	8	12	18	24
diversity management	11	13	9	18	17

People in Germany, Italy and, particularly, Poland attach above-average importance to the financial health of employers. Flexible working hours are most appreciated in Germany, Spain, the Netherlands and Switzerland.

Interestingly, the Italians show a pattern of preferences similar to that shown by people in Hong Kong and India, who were less interested in the job itself (salary and benefits, long-term job security, and pleasant working atmosphere, good life/work balance, and so on). Instead, they showed an above average interest in good training, strong management, strong image/values, quality products and services, international global career opportunities, care for the environment and society, and the latest technology.

functional attributes viewed by country: APAC (continued)

what is your top 5 of most important criteria when choosing an employer?

functional attributes	APAC	Japan	New Zealand	Singapore
salary & employee benefits	66	69	69	63
long-term job security	50	50	51	41
pleasant working atmosphere	43	58	55	45
good work-life balance	43	37	39	48
interesting job content	38	59	45	29
career progression opportunities	38	21	35	39
financially healthy	36	30	29	36
conveniently located	30	42	32	32
flexible working	25	32	30	27
good training	21	18	31	26
strong management	21	19	22	28
strong image/strong values	19	15	16	15
quality products/services	16	15	14	13
international/global career opportunities	13	8	9	21
environment and society (CSR)	12	7	10	11
latest technologies	12	9	8	12
diversity management	11	12	9	15

functional attributes viewed by country: Europe

what is your top 5 of most important criteria when choosing an employer?

functional attributes	Europe	Belgium	France	Germany	Hungary	Italy	Netherlands
salary & employee benefits	63	65	72	99	85	52	67
long-term job security	58	61	59	61	67	53	69
pleasant working atmosphere	55	57	58	60	51	47	67
good work-life balance	45	48	39	51	50	42	41
interesting job content	42	47	48	37	36	49	41
career progression opportunities	39	33	42	40	36	36	33
financially healthy	37	37	34	45	31	40	37
flexible working	33	29	30	38	30	28	36
conveniently located	31	35	30	27	33	25	36
good training	21	20	18	14	21	25	27
quality products/services	14	14	13	11	11	19	13
strong management	13	10	11	11	11	16	13
international/global career opportunities	11	10	10	12	8	16	9
environment and society (CSR)	11	12	10	11	8	14	10
strong image/strong values	11	9	10	9	6	15	10
diversity management	10	10	10	10	7	11	8
latest technologies	10	8	7	8	8	12	7

Europe

In Europe, in six of the countries surveyed – Belgium, France, Hungary, the Netherlands, Poland and the UK – people expressed an above-average interest in salary and employee benefits, particularly Hungary, which scored 85% (22% above average). Long-term job security was seen as particularly important by respondents in Belgium, Germany, Hungary, Poland and Spain. Interestingly, people in Italy, Sweden and Switzerland showed no more than below-average interest in either.

People in Belgium, the Netherlands, France and Germany, Sweden and Switzerland all placed great value on a pleasant working atmosphere, particularly in the Netherlands, where this attribute scored just as high as salary and employee benefits (both 67%). At the same time, Belgians and the French showed a more than average preference for interesting job content, as did the Poles, the Swedes and the British.

functional attributes viewed by country: Europe (continued)

what is your top 5 of most important criteria when choosing an employer?

functional attributes	Europe	Poland	Spain	Sweden	Switzerland	UK
salary & employee benefits	63	69	63	56	57	65
long-term job security	58	61	60	50	50	50
pleasant working atmosphere	55	53	49	64	60	52
good work-life balance	45	43	44	36	46	46
interesting job content	42	48	43	65	40	48
career progression opportunities	39	42	50	27	34	35
financially healthy	37	49	30	24	37	31
flexible working	33	23	35	32	40	30
conveniently located	31	29	22	41	31	38
good training	21	18	25	24	18	31
quality products/services	14	11	14	18	17	11
strong management	13	11	14	14	12	15
international/global career opportunities	11	11	12	5	12	9
environment and society (CSR)	11	7	11	13	13	9
strong image/strong values	11	7	11	10	10	11
diversity management	10	9	10	10	14	9
latest technologies	10	10	12	7	9	7

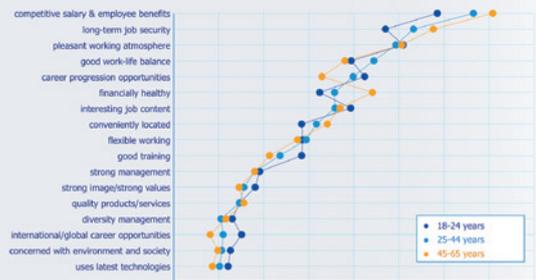
functional attributes by gender

The survey showed that the functional attributes that men find particularly attractive in an employer are good career opportunities, a healthy financial situation and, to a lesser degree, strong management. They are also, perhaps not surprisingly, attracted by new technologies. Women, on the other hand, are looking for a pleasant working atmosphere, a good work/life balance, convenient location and flexible working hours. Interestingly, although both genders are attracted by competitive salary and employee benefits, women have a slightly stronger interest in this attribute than men. Attributes that both genders find more or less equally attractive include long-term job security, interesting job content, diversity management, as well as good training and strong image/values.

salary, job security and financial health gain importance with age; training & career typically searched by young potentials

what attributes make your top 5 of most important criteria when choosing an employer?

attributes viewed by age group – ranked by occurrence in top 5



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men more attracted by career and financial health, women look more for atmosphere, balance, accessibility & flexibility

what attributes make your top 5 of most important criteria when choosing an employer?

attributes viewed by gender – ranked by occurrence in top 5



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functional attributes by level of education

The higher an employee's level of education, the more important are good career prospects (including opportunities for developing an international or global career), job content and strong images/values. The more highly educated are not particularly looking for long-term job security, or for a pleasant working atmosphere. Practicalities, such as location and flexible working hours are not considered to be very important, either. The groups with lower educational levels exhibit a complementary set of responses, such as more concern with security, the social aspects of working and the practical requirements of their life outside work. Attributes that are valued more or less equally across the board include competitive salary and benefits, good work/life balance, a financially healthy employer, good training opportunities, quality products and services, diversity management and concern with the environment and society.

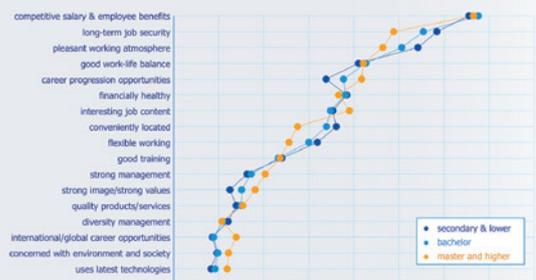
functional attributes by age

The survey showed that, not surprisingly perhaps, the attributes of salary and employee benefits, long-term job security and the financial health of an employer gain in importance with age. Equally unsurprisingly, attributes such as good training and career progression opportunities are typically valued most highly valued by the younger age group. All age groups are interested in a pleasant working atmosphere and interesting job content (especially the youngest group). Strikingly, all age groups were attracted by flexible working opportunities. Other attributes that showed little differentiation according to age included quality products and services, diversity management and care for the environment and society (although this appealed slightly more so to the younger age group).

the higher the education degree, the higher the importance of career & job content; job security, atmosphere, accessibility and flexibility more important to people with a lower education degree

what attributes make your top 5 of most important criteria when choosing an employer?

attributes viewed by age group – ranked by occurrence in top 5



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2.3 personality traits: symbolic or 'soft' values

In order to improve our understanding of what actual and potential employees around the world are looking for in an employer in given sectors, we have extended the survey's coverage to take in not only functional attributes, but also a more psychological dimension. For the first time, we therefore asked respondents to tell us what symbolic attributes (in the shape of personality traits or 'soft' values) they liked in a potential employer. We believe that the answers to these questions provide a different perspective – a more in-depth, if less tangible, view of what contributes to building a successful employer brand within the employer's specific sector. In this section, we discuss the results of this part of the survey.

most highly valued personality trait in employers

The respondents were asked to choose from a list of personality traits the one they would find most attractive in an employer, and also to say which would make up their 'top five' personality traits that they would use as criteria for choosing a new employer.

Worldwide, the same picture emerged. Reliability and honesty were the most valued employer personality traits. When asked to choose a single trait, respondents choose 'honest', followed by 'secure' and 'reliable'. When the top five were considered, 'reliable' came first (67%), followed by 'honest' (66%), 'secure' (57%), 'sincere' (49%) and 'intelligent' (43%).

regions

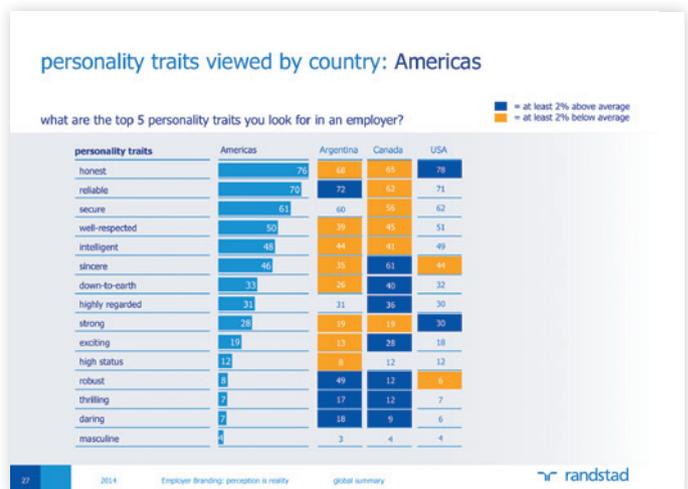
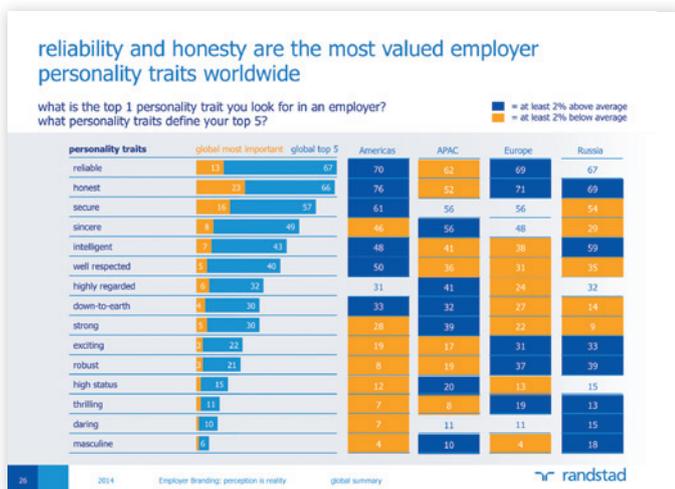
In terms of regions, 'honest' was valued particularly highly in the Americas (76%), as was reliability (70%). Europe shows a similar picture, with 'honest' #1 (at 71%) and 'reliable' #2 (at 69%). In APAC, scores for honesty and reliability were lower than average (at 62% and 52%). In Russia, honesty was #1, valued at 69% (above the global average), while 'reliable' was at the global average (67%).

Other noteworthy findings were that 'intelligent', 'well-respected' and 'down to earth' were particularly valued in the Americas; while Europeans attached above-average importance to 'exciting', 'robust' and 'thrilling'. In APAC, the traits of 'sincere', 'highly regarded', 'down-to-earth' and 'strong' were more highly valued than elsewhere. Like people in the Americas, Russians appreciate intelligence in an employer, but they also like what we might call the 'macho' traits of 'exciting', 'robust', 'thrilling', 'daring' and 'masculine'.

soft values per country

the Americas

Looking now at the traits in the various countries, we see that 'honest' is particularly highly valued in the USA, while 'reliable' is the most sought-after personality trait in Argentina. Canada rates those two traits with a less than average score. Instead, Canadians attach relatively greater importance to intrinsic characteristics, such as 'sincere', 'down-to-earth' and 'highly regarded'. Both Argentina and Canada appreciate the 'excitement factor' in an employer, with traits such as 'robust', 'thrilling' and 'daring'. The USA shows at most only average interest in such aspects.



APAC

Interestingly, overall, 'honest' ranks only #4 in APAC, with 'sincere' and 'secure' ranking #2 and #3 respectively after 'reliable'.

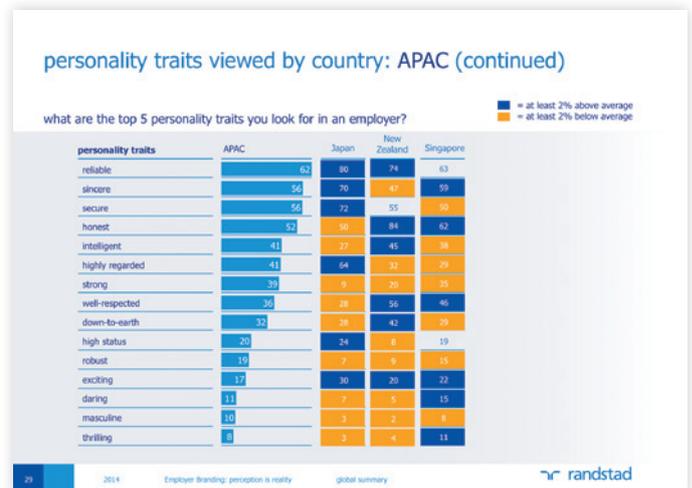
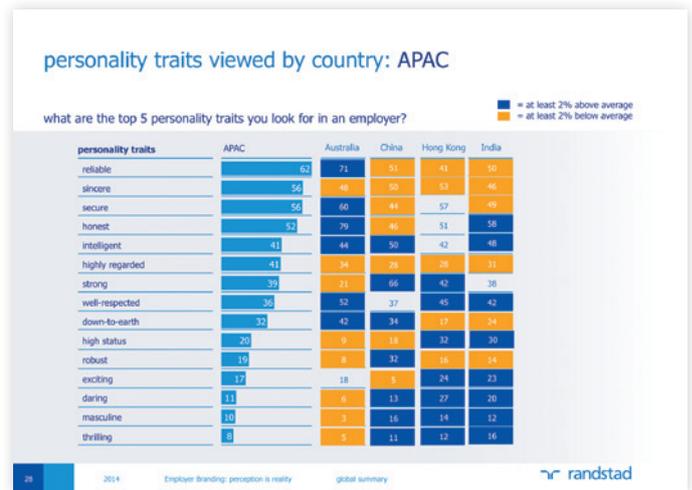
Australia and New Zealand, not surprisingly given their high cultural affinity, show a similar pattern, with 'honest' rating most highly (79% in Australia, 84% in New Zealand), and 'reliable' next (71% in Australia, 74% in New Zealand). Both Australia and New Zealand also show an above-average score in 'well-respected' and 'down-to-earth'.

Hong Kong and China attach an average or less than average value to traits such as 'honest' and 'reliable'. However, they do find 'intelligent' and 'strong' attractive traits. Hong Kong and India like to see an employer that is 'exciting', 'daring', 'masculine' and 'thrilling'. This interest is also largely shared by people in Singapore and China. All except China also seem to value status ('well-respected' and 'high status'). By contrast, in Australia and New Zealand the 'excitement factor' does not seem to make a company extra-attractive.

Japan seems to have its own, different and muted pattern of values. 'Reliable' is the most highly valued trait, followed by 'secure' and 'sincere'. As elsewhere in Asia, status is important ('high status' and 'well regarded'), and it shares, to a degree, the interest that other Asian countries show in 'excitement' as an important part of working life, but expressing it, perhaps, in a quieter, more controlled way than is implied in traits such as 'daring', 'masculine' and 'thrilling'.

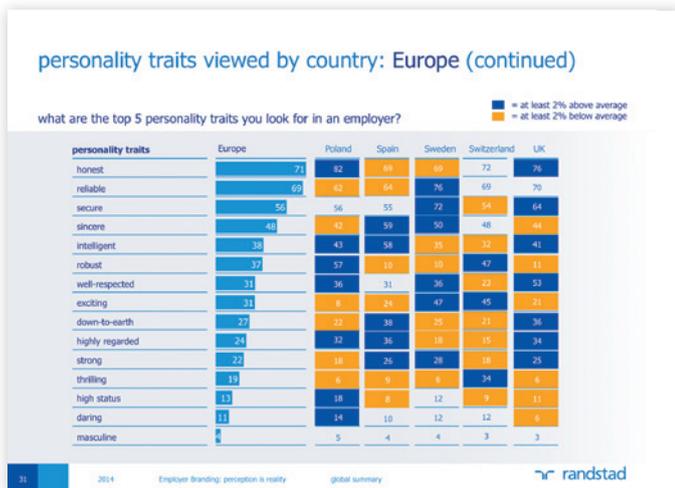
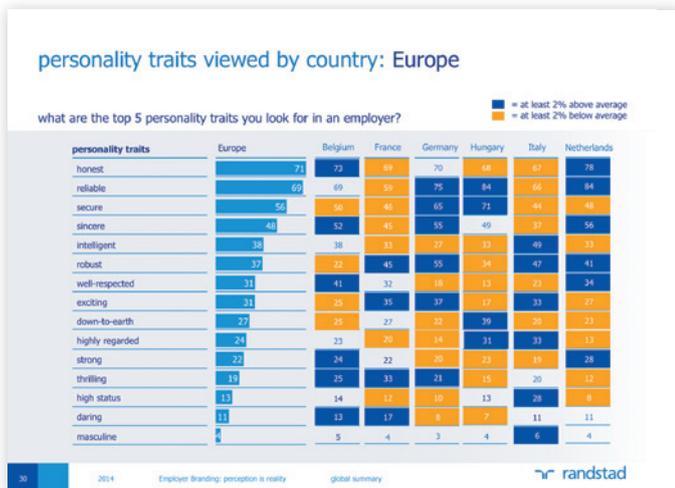
Indians place a higher than average value on honesty, but a less than average value on traits such as 'reliable', 'sincere' and 'secure'. Indians also value intelligence. Like other Asians, they also seem to value status ('well respected' and 'high status'), and excitement, with above-average rankings for 'exciting', 'daring', 'masculine' and 'thrilling'.

Singaporeans give a high value to the trait 'honest', followed by 'sincere' and 'secure'. They otherwise conform to the pattern shown by other countries in APAC, with 'well-respected' and 'high status' again featuring strongly, while the more 'macho' traits of 'exciting', 'daring' and 'thrilling' also play a role in making an employer attractive to Singaporeans.



Europe

Countries placing 'honest' higher than average on their list of traits that the ideal employer should have are Belgium, the Netherlands, Poland and the UK. 'Reliable' is particularly valued by Germany, Hungary, the Netherlands and Sweden. Germans and Swedes share their ranking of 'reliable', 'secure' and 'sincere'. In France and Italy, respondents showed less than average interest in the traits of 'honest', 'reliable', 'secure' and 'sincere' in their top 5 list. Employees in Spain and the UK (and, to a degree, in Hungary) like to see an employer who is 'down-to-earth', 'highly regarded' and 'strong'.



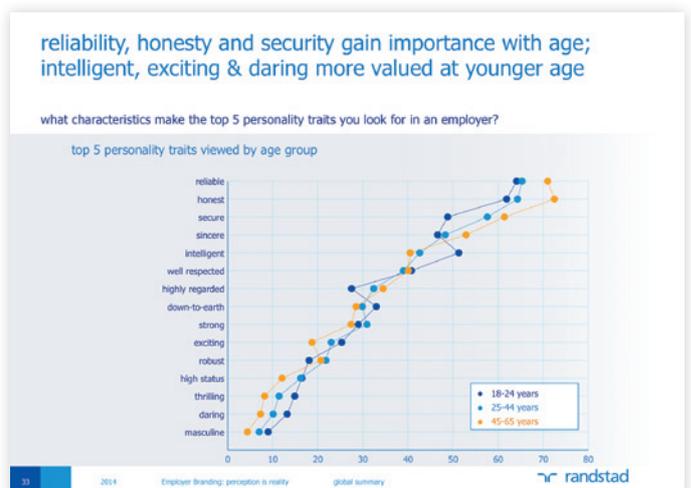
soft values by gender

The survey shows that, in general, men prefer employers who are highly regarded (and have high status), and are thrilling, strong and daring. Women, on the other hand prefer employers who are reliable, honest and secure. Both genders value intelligence (though women slightly less than men). Both also value an employer who is robust and exciting.



soft values by age

The survey shows that, in general, reliability, honesty and security and sincerity become more important with age. Not surprisingly, perhaps, younger people place greater weight on traits such as intelligence, excitement and daring than older people.



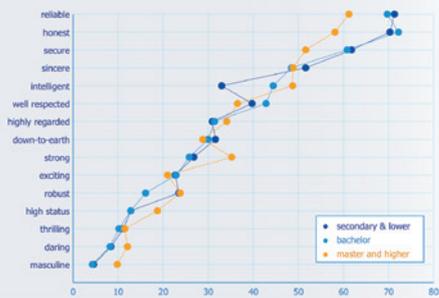
soft values by education

The survey shows that 'intelligence', 'strength' and 'status' are more highly valued by people with a Master's degree or higher. Those with a lower degree tend to look for reliability, honesty and security. Intelligence is least highly valued by those with secondary or lower education.

intelligence, strength and status are more valued by people with a master degree; those with a lower degree look more for reliability, honesty and security

what characteristics make the top 5 personality traits you look for in an employer?

top 5 personality traits viewed by age group



2.4 key issues affecting working life today

The survey also looked at four key issues affecting working life today: the difficulty for employees of maintaining a good balance between work life and home life; the need to retain good employees and how they can be motivated to stay; the acceptability of commuting times; and the fact that, for many people, their actual retirement age may differ considerably from their preferred retirement age.

work/life balance

Many people worldwide experience difficulty in maintaining a healthy and sustainable balance between the demands of their work and the requirements for a home or private life. What factors do employees see as putting such a balance at risk?

main factors

Most employees consider the biggest threat to be, primarily, an unfavorable work environment, along with too many extra hours (workload) and too many deadlines (work pressure). Poor cooperation with colleagues is another key factor, especially in the Americas and in Europe. In Russia, meanwhile, work during weekends is significantly jeopardizing work/life balance, along with mental pressure from employers to finish the job.

unfavorable work environment, workload and too many deadlines are main factors that put work-life balance at risk

what factors put your work-life balance at risk?

■ = at least 2% above average
■ = at least 2% below average

risk factors work life balance	Global	Americas	APAC	Europe	Russia
unfavorable working environment	43	50	34	52	48
putting in too many extra hours	42	39	44	42	56
too many deadlines	41	36	41	46	58
poor cooperation with colleagues	41	45	30	50	38
work during evenings/weekends	40	42	34	44	56
deadlines are too tight	40	35	43	42	36
lack of support/assistance to meet deadlines	32	42	24	32	20
mental pressure from employer to finish the job	32	26	31	38	53
no flexible working hours	26	35	23	28	23
concerns about work after working hours	27	28	22	32	36
too much responsibilities	24	26	26	21	34
availability after working hours	22	24	12	31	26
telecommuting	11	11	10	14	9

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countries most and least affected

The countries where the most risk factors were mentioned include, China, Singapore, New Zealand and Hong Kong in APAC; Argentina and Canada in the Americas; and Belgium, Switzerland and Germany in Europe. Employees in these countries seem to feel their home life is being affected too much by their work. On the other hand, generally speaking, employees in Japan, the USA, Italy, Spain and Sweden seem to be the least impacted by the factors described.

deadlines

As already mentioned, deadlines are a widespread source of anxiety. However, there is an interesting nuance to this trend: while time pressure seems to be a bigger strain in APAC and Europe, employees in Europe are generally given more assistance to get the job done – even in Poland, where deadlines are a major concern. This is in strong contrast to the Americas and certain APAC countries, where a lack of support to meet deadlines is very keenly felt.

exceptions

Argentina provides a notable exception to global and regional trends in terms of a lack of concern over being burdened with excess responsibility: this factor is about half as important here compared to the average elsewhere. Similarly, French employees are largely untroubled by the issue of working after normal hours, possibly due to tighter national legislation on overtime.

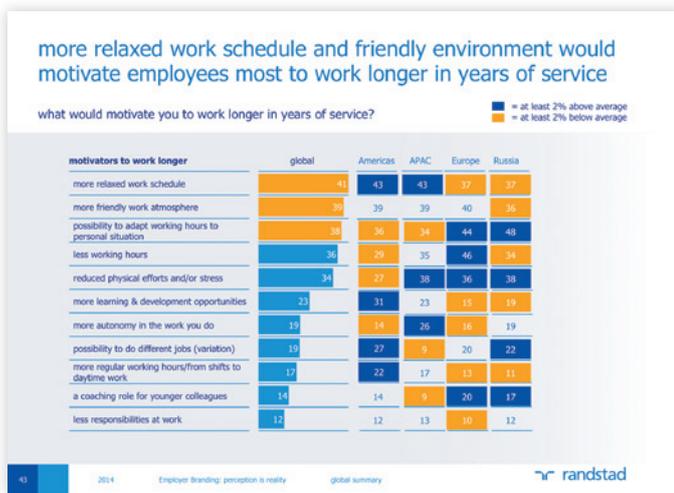
telecommuting irrelevant?

At the bottom end of the scale, telecommuting does not appear to be regarded as a real threat, either regionally or globally. This could perhaps hint that this arrangement could in fact provide a

solution to problems surrounding work/life balance, or simply that it is too new a phenomenon to be registering with most employees. Either way, it will be fascinating to see how perceptions of telecommuting evolve in the future.

retention

Having invested in their workforce, companies naturally want to retain their best employees. The survey investigated what factors would be relevant in motivating employees worldwide to continue to work for the company.



main factors

The most frequently mentioned motivators (especially in France, Switzerland and Japan) were a more relaxed work schedule, a friendlier working atmosphere and the possibility of adapting working hours to their personal situation. Workers in the USA, China, India and Singapore are particularly interested in more learning and development opportunities. In Europe, however, particularly in Germany, Belgium, Sweden, the UK and the Netherlands, the prospect of working fewer hours is a big attraction. For their part, employees in Japan and also in Poland, Hungary and Germany, would be highly motivated by reduced physical effort and stress.

working hours

Within the general importance of hours and scheduling, it is worth highlighting a couple of broad sub-patterns. To begin with, one might expect the possibility of working fewer hours would go hand in hand with a wish for more relaxed schedules. But this does not seem to be the case. In fact, there is a large difference between the two percentages for these factors in the

Netherlands, Germany, Sweden, Switzerland, Poland, Argentina, the USA, China and Singapore. Moreover, the examples of Argentina, Russia, China, New Zealand, the Netherlands, Spain, Sweden and Switzerland all demonstrate a logical correlation: where large numbers of employees are attracted by adapting their working hours to their personal situation, there is a lack of appetite for decreasing shift work in favor of more regular schedules. The converse holds true in India, Hungary and Japan, where the below-average interest in adapting schedules to personal circumstances is reflected in a greater desire for more established timetables.

variety

Another correlation links the relative appeal of having more varied tasks and the potential attraction of performing a coaching role with younger colleagues. In China and Japan, employees seem uninterested in either possibility – Chinese employees, by contrast, chiefly want more autonomy. In Argentina, Sweden, Switzerland, New Zealand, Canada, Australia and India, however, the figures for these motivators are both higher and quite close together, suggesting that there is a sizeable number of employees in these countries who see coaching younger colleagues as a possible way of livening up their routines.

less responsibility

Finally, broadly speaking, lightening the load of responsibilities at work is not among the key factors that would encourage employees to stay with the company. However, workers in Singapore, India and Hong Kong clearly feel more burdened by this issue than their regional and global counterparts.

commuting time

Many people find themselves having to commute relatively long distances to and from work. To what extent do employees find this a problem?

In the vast majority of countries, most employees are happy with how long it takes them to get to work (i.e., their actual commuting time is equal to or shorter than what they would find acceptable). This is the case in the Americas and Russia. The same applies in most APAC countries and in European countries (except Switzerland, where people have an average commuting time of 46 minutes).

For example, in the USA, the actual average commute time is 21 minutes, and the maximum acceptable time would be 33 minutes. Similar

figures are found for Argentina and Canada, and also for Australia and New Zealand. In other APAC countries, commutes are often much longer (30-40+ minutes). For example, in Hong Kong, India and Singapore, journey times exceed 40 minutes, while China falls into the 30-40 minute bracket. Seven countries (Russia, Argentina, Germany, Hungary, Sweden and Poland) have similar times to China, while the remaining 11 countries studied require average commutes of less than half an hour.

It is difficult to identify geographical trends concerning commute times, as each of the groups above brings together countries from different regions and of different sizes. However, one clear conclusion is that perceptions play a key role: the bigger the cushion between how long journeys actually take and how long employees are willing to travel, the higher proportion of satisfied commuters there are in a country.

India, Singapore and Switzerland are the only three countries in which the actual commute time exceeds the maximum acceptable time. In addition, Switzerland features by far the biggest negative gap between workers' expectations (a commute of a maximum of 37 minutes) and reality (an average of 46 minutes spent traveling to work). As a result, it is the country with the highest proportion of commuters who find their journey time unacceptable: 47%.

By contrast, employees in India and Singapore travel on average three minutes longer than they would like to, but their perceptions are not nearly as critical: only 28% and 27% respectively class their commute as worse than acceptable. Equally, since Hong Kong employees are willing to travel for an average of 50 minutes, they are not as dissatisfied as those in several other countries (only 14%), despite actually traveling for longer than all except their Indian and Swiss counterparts.

Japan is the country with the most satisfied commuters, as 74% of respondents rated how long they spend traveling to work as above par, compared to just 2% who said they were unhappy, and there is an enormous 24-minute gap between actual and acceptable travel times (27 vs. 51 minutes). The Netherlands (75%) and France (73%) are the next countries in the "highest proportion of satisfied commuters" table, followed by the UK and Belgium (69%), Germany (68%), Sweden, Italy and Poland (all 66%) and the USA (65%). In all of these countries, there is a big gap between how long employees travel and their maximum acceptable commuting time.

retirement age

The ageing of the population in many countries around the world means that many employees will not be able to retire as early as they had expected. The survey sought to find out how people viewed their preferred and expected retirement dates. Respondents were asked what age they thought they would have to work to, and what age they would like to work to. The results are summarized below.

In most countries, employees said they would like to retire 4 to 6 years earlier than they think they are allowed to. For example, in the Americas, people indicated 62-63 as the allowed retirement age, and 57-58 as their ideal retirement age, while in Russia workers think they will have to work up to the age of 60, but would like to stop working at 55.

In Europe, the standard required retirement age as perceived by respondents is slightly higher: between 64 and 67. In a number of countries, most employees would like to retire earlier than they believe is possible: this particularly applies to Hungary (83%), Germany (80%), Italy (79%), Poland (72%) and the UK (72%). It is therefore no coincidence that in these countries there is a larger gap between the age people think they can retire at and their desired retirement age.

The picture in APAC is much more varied. The majority of countries still follow the 4-6 year pattern, but in China, Hong Kong and Singapore the desired retirement age (52-55) and the perceived standard retirement age (57-60) are significantly lower than in Australia and New Zealand, where employees would like to retire at around 57-59, but think they have to wait until 63-64 (as in the Americas).

Japan and India are the two big exceptions. Remarkably, Japanese employees want to work longer (up to the age of 62) than they think is mandatory (60). The bulk of Indian employees (55%), meanwhile, feel that the situation in their country is just right: the average age at which people want to retire and think they can retire is 56. In no other country do people believe they have the right to stop working at such a young age.

3 Randstad Award

3.1 most attractive sectors worldwide

In total, the attractiveness of 15 sectors was measured among the respondents. This led to the following global ranking:

attractiveness global sectors worldwide^(*)

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

	2014
1. IT	56%
2. Life Sciences	49%
3. Consulting	48%
4. Automotive	47%
5. Technology	47%
6. Industrial-Manufacturing	45%
7. FMCG	44%
8. Hospitality	40%
9. Construction	40%
10. Financial services	40%
11. Services	39%
12. Chemical	39%
13. Logistics	38%
14. Power & Utilities	37%
15. Retail	34%

(*) global sectors including approx. 5,000 companies surveyed worldwide

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The IT sector is the clear winner in 2014, followed by Life Sciences and Consulting, with Automotive and Technology closely behind. Retail is perceived as the least attractive sector.

3.2 most attractive sectors by country

On a country level, the Top 3 most attractive sectors (covering the largest employers locally within the relevant country) were as follows:

top 3 most attractive sectors by country^(*)

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

	1 st position	2 nd position	3 rd position
Americas			
Argentina	Software-IT	Car-Truck Industry	Chemical-Paper-Rubber
Canada	Transport-Logistics	High Tec manufacturing	Motor vehicles & Parts
USA	Media-Information	IT	Aerospace-Defense
APAC			
Australia	Aviation	FMCG	Mining & Natural Resources
China	Financial services	Power & Utilities	Pharmaceutical-Chemical
Hong Kong	Transport-Logistics	Engin.-Constr.-Energy	Professional Services
India	IT-Telecom	FMCG-Durables-Retails	Auto & Auto-components
Japan	FMCG	Internet & Contents	Nonelectric, Electric
New Zealand	FMCG	Media	Education & Training
Singapore	Hospitality & Recreation	Engin.-Construction	Transport-Logistics
Russia			
	Oil & Gas	Automotive	Energy

(*) sectors covering largest employers locally within country

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top 3 most attractive sectors by country^(*) (continued)

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

	1 st position	2 nd position	3 rd position
Europe			
Belgium	Pharmaceutical	Media	IT-Consulting
France	Aeronautics	Consumer Goods	Energy-Environment
Germany	Vehicles	IT-Consulting-Telecom	Machine construction
Hungary	Automotive	Industrial-Manufacturing	Pharmaceutical-Chemical
Italy	Fashion-Luxury	Media	Electronics
Luxembourg	Services	Finance	Consulting
Netherlands	Healthcare	Non-Profit	Chemical
Poland	Automotive	Power	Electrotechnical
Sweden	Public sector	Industrial-Manufacturing	Finance
Switzerland	Watchmaking Industry	IT-Consulting	Industrial-Manufacturing
Spain	Electronics	Media	Food-Beverages
UK	Automotive-Aerospace	Pharmaceutical	Professional Services

(*) sectors covering largest employers locally within country

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3.3 most attractive companies by country

Based on the percentage of people who know the company and say they would like to work for it, the most attractive companies per country were as follows:

top 3 most attractive companies by country

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

Americas	Award winner	1st runner up	2nd runner up
Argentina	Mercedes Benz	Ford	Toyota
Canada	WestJet Airlines	Bombardier	IBM Canada
USA	Google	Amazon.com	Microsoft Corporation
APAC			
Australia	ABC	Virgin Australia	Department of Immigration & Border Protection
China	IBM	Intel	Apple
Hong Kong	Cathay Pacific	MTR	Hong Kong Dragon Airlines
India	Microsoft	Google India	Sony
Japan	Meiji Holdings	Suntory Holdings	Sony
New Zealand	Air New Zealand	TVNZ	Coca-Cola Amatil
Singapore	Singapore Airlines	Shell	Changi Airport Group
Russia			
	Gazprom	BMW	Rosneft

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top 3 most attractive companies by country (continued)

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

Europe	Award winner	1st runner up	2nd runner up
Belgium	GSK	Pfizer	Jan De Nul
France	Airbus	Dassault Aviation	Eurocopter
Germany	BMW	Daimler	Audi
Hungary	Audi	Mercedes-Benz	IBM
Italy	Thales Alenia Space	Ferrero	Feltrinelli
Luxembourg	RTL Group	Groupe Enovos	Banque de Luxembourg
Netherlands	Philips	Luchthaven Schiphol	KLM
Poland	Mercedes-Benz	Toyota Motor	Samsung Electronics
Sweden	IKEA	Sveriges Television	Sveriges Radio
Switzerland	Patek Philippe	Swatch	Rolex
Spain	IBM	Nestlé	Bayer
UK	BMW	Rolls-Royce Group	John Lewis

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4 Randstad Global Award

In addition to the national Randstad Awards in the 23 countries, this year we also awarded a global Randstad Award to the most attractive employer worldwide. The winner was selected from a list of the Top 50 largest companies, based on the following objective criteria:

- largest number of employees
- corporate status (private sector)
- operating in at least 25 countries
- same company name in all countries
- minimum of 30% of employees outside the base country

The list of companies meeting these criteria is as follows:



The winner of the global Randstad Award is the company with the highest relative attractiveness across 22 countries (Luxembourg is excluded), determined by the question "Would you like to work for this company?". To balance the impact of the different countries and reflect the actual economic reality, a weighting on GDP (gross domestic product) is applied after consolidating the data.

Out of the Global Top 50 eligible companies, BMW is recognized as the most attractive employer and the first company in the 14-year history of the Randstad Award to become the global winner. 61% of the respondents worldwide would like to work for BMW. The company scores #1 in the categories 'competitive salary & employee benefits', 'pleasant working atmosphere' and 'strong management'. BMW also scores well in being a financially healthy company (#2) and in providing good training (#3).

In terms of attractiveness, the ranking is as follows:



BMW is the 2014 Global Randstad Award winner!

5 REMAS, an alternative parameter for measuring attractiveness

This year, Randstad is introducing a new way of measuring and comparing an employer's attractiveness score: the Randstad Employer Attractiveness Score (REMAS, for short). This metric makes it easy to benchmark the performance of different employers or sectors.

how does the REMAS work?

The REMAS is an adaptation of the concept of Reichfield's Net Promoter Score specifically to the needs of employer branding. People who know a sector or company are asked whether or not they would like to work for that sector or company. The REMAS is calculated by taking the percentage of those that would like to work in the given sector or company (the 'promoters') and then subtracting the percentage that would not like to do so (the 'detractors').

The top 10 most attractive sectors worldwide by REMAS are as follows:



The top 10 most attractive global companies worldwide by REMAS are as follows:



good to know you

If you have any questions please contact:
Randstad Holding nv
Group Marketing and Communications
corporate.communications@randstadholding.com