

# employer brand research 2019



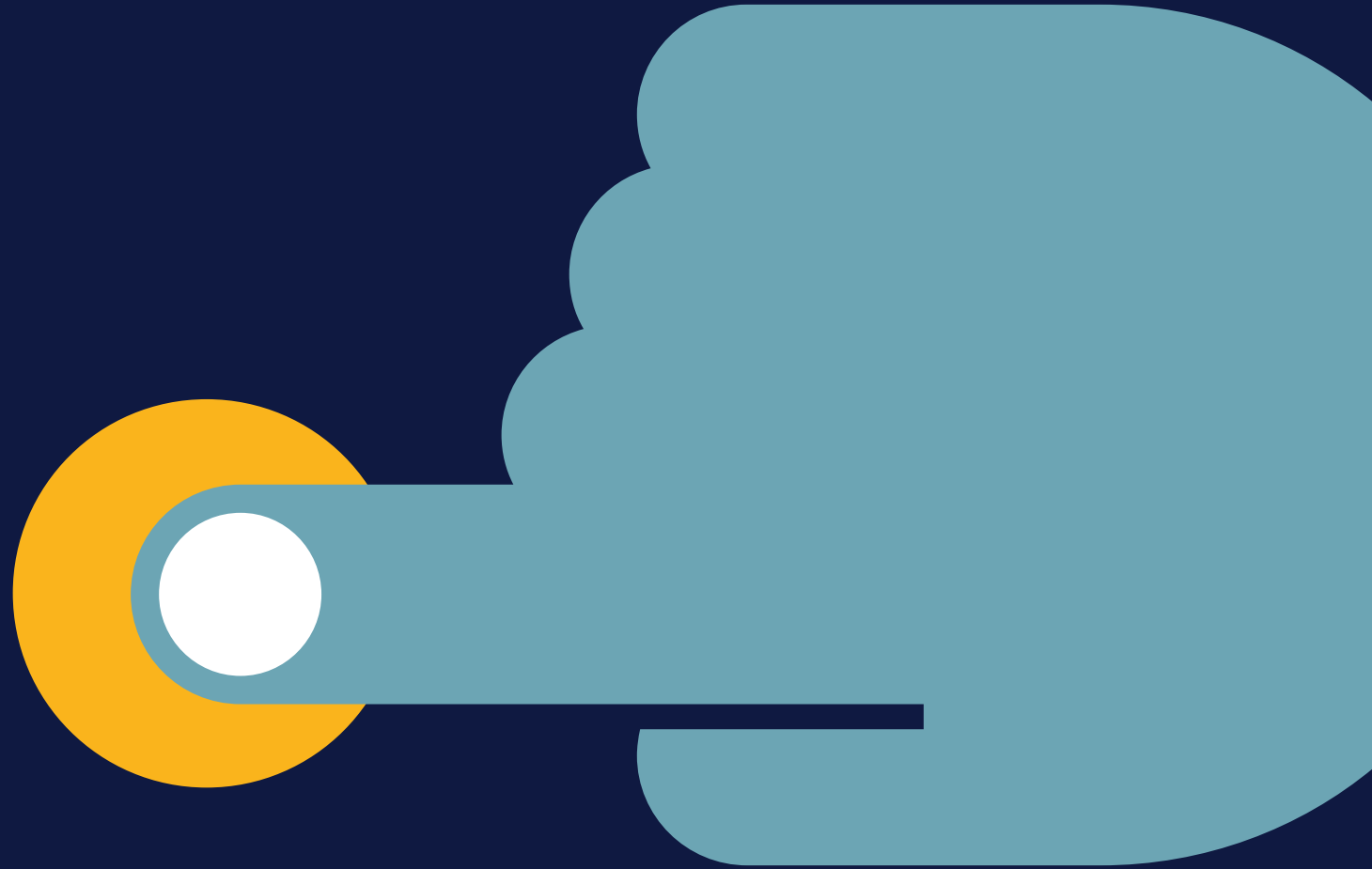
country report  
japan.

# contents.

- 1 introduction
- 2 country results
- 3 sector insights
- 4 top employers
- 5 deep dive
- 6 methodology



# introduction.



# why employer branding matters.



Companies with positive brands get twice as many applications as companies with negative brands, and they spend less money on employees.<sup>1</sup>

50%

of candidates say they wouldn't work for a company with a bad reputation – even with a pay increase.<sup>1</sup>

96%

agree that alignment of personal values with a company's culture is a key factor in their satisfaction working there.<sup>3</sup>

80%

of workforce leaders agree that a strong employer brand has a significant impact on their ability to hire great workforce.<sup>2</sup> As people work for cultures, not companies, their perception of you as an employer is of paramount importance. Both recruiters and candidates cite company culture as one of the most important determinants in employer choice. Also, if your culture is transparent: candidates actively research the culture of companies to understand if they'll fit. If candidates see positive employee and candidate experiences on review sites, they feel more confident submitting their resume and making a career move.

70%

Organizations that invest in strong candidate experience improve quality of hire by 70%.<sup>8</sup>

62%

of candidates research companies on social media before applying.<sup>5</sup>



Companies with bad reputations pay 10% more per hire.<sup>4</sup>

67%

Companies with a formal employee engagement strategy in place are 67% more likely to improve their revenue per full-time equivalent on a year-over-year basis.<sup>6</sup>

76%

Employees who experience a strong alignment between what their employer says about itself and their experience working there are more likely to recommend their employer as a place to work.<sup>7</sup>

# the employer brand roadmap.



# what is the randstad employer brand research?

- **representative employer brand research** based on perceptions of the general audience. Optimizing 19 years of successful employer branding insights.
- **independent survey** with over 200,000 respondents in 32 countries worldwide.
- **reflection of employer attractiveness** for the country's 150 largest employers known by at least 10% of the population.
- **valuable insights** to help employers shape their employer brand.



# 32 countries surveyed covering more than 75% of the global economy.

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



## worldwide

- over 200,000 respondents
- 6,162 companies surveyed

## sample

- aged 18 to 65
- representative on gender
- overrepresentation of age 25 – 44
- comprised of students, employed and unemployed workforce

## country

- 6,746 respondents

## fieldwork

- online interviews
- between 14 and 24 december 2018

## length of interview

- 16 minutes

# employer brand research set up.

## 30 companies per respondent

'do you know this company?':  
determines awareness.

## for each company known

'would you like to work for this company?':  
determines attractiveness.

## each company known

rating on a set of drivers:  
determines reason for attractiveness.

## smart sampling

Each respondent is shown 30 companies. Each company is evaluated only by respondents who are aware of that particular brand.

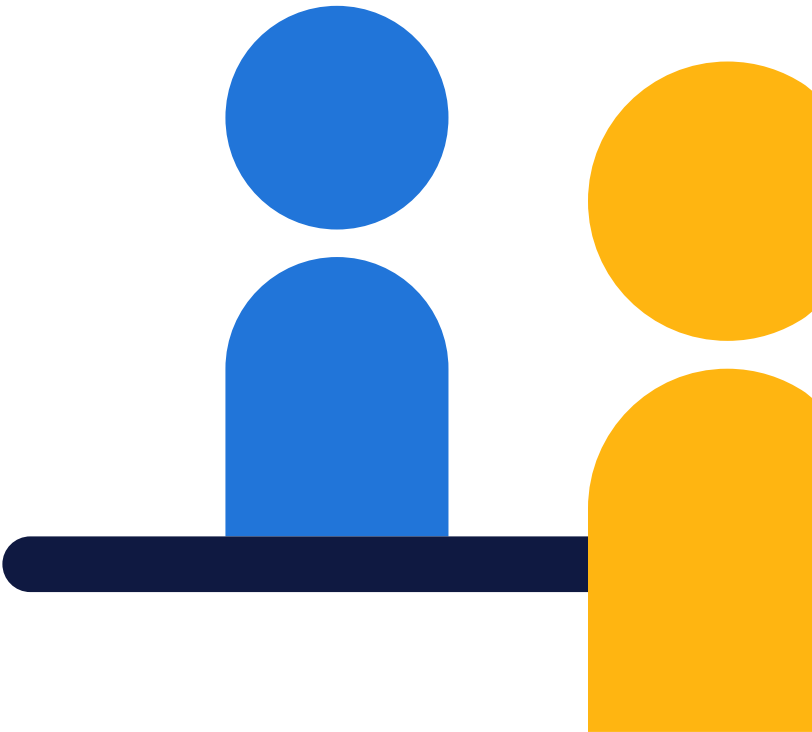
In order to make sure that the less well known brands are assessed by a sufficient number of respondents, we make use of a smart sampling method.

This method ensures that the lesser known companies are shown to more respondents in order to realize a sufficient robust sample. That way the Randstad Employer Brand Research assures dependable insights for both well known and lesser known employer brands.

## drivers

each company is evaluated on:

- 01 financially healthy
- 02 uses latest technology
- 03 very good reputation
- 04 job security
- 05 career progression
- 06 gives back to society
- 07 interesting job content
- 08 pleasant work atmosphere
- 09 work-life balance
- 10 attractive salary & benefits



**KANTAR TNS**

For this research, Randstad partners with Kantar TNS, one of the world's largest insight, information and consultancy networks.





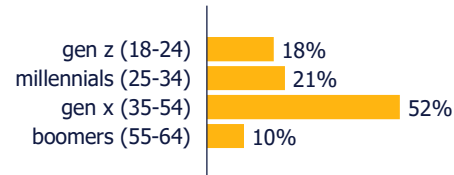
# sample composition in japan

## socio-demographics, employment situation, region.

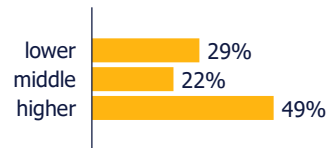
### gender



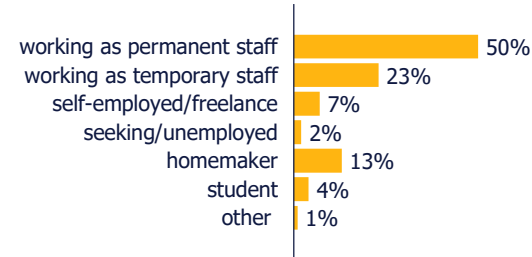
### age



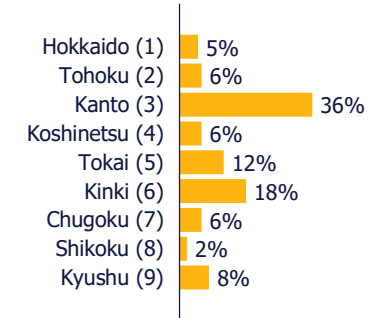
### education



### situation



### region

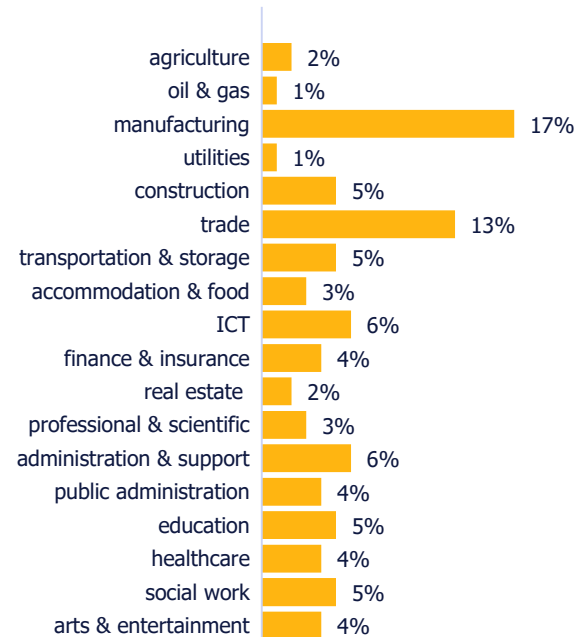


total sample: 6,746  
fieldwork: between 14 and 24 december 2019

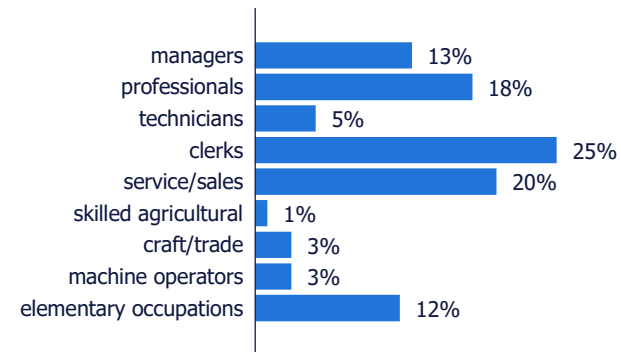
1. Hokkaido
2. Aomori, Iwate, Miyagi, Akita, Yamagata, Fukushima
3. Ibaraki, Tochigi, Gunma, Saitama, Chiba, Tokyo, Kanagawa
4. Niitaga, Toyama, Ishikawa, Fukui, Yamanashi, Nagano
5. Shizuoka, Aichi, Gifu, Mie
6. Shiga, Kyoto, Nara, Osaka, Hyogo, Wakayama
7. Tottori, Shimane, Okayama, Hiroshima, Yamaguchi
8. Tokushima, Kagawa, Ehime, Kochi
9. Fukuoka, Saga, Nagasaki, Kumamoto, Oita, Miyazaki, Kagoshima, Okinawa

# sample composition in japan

## sector



## function



base: currently employed (n=5,386)



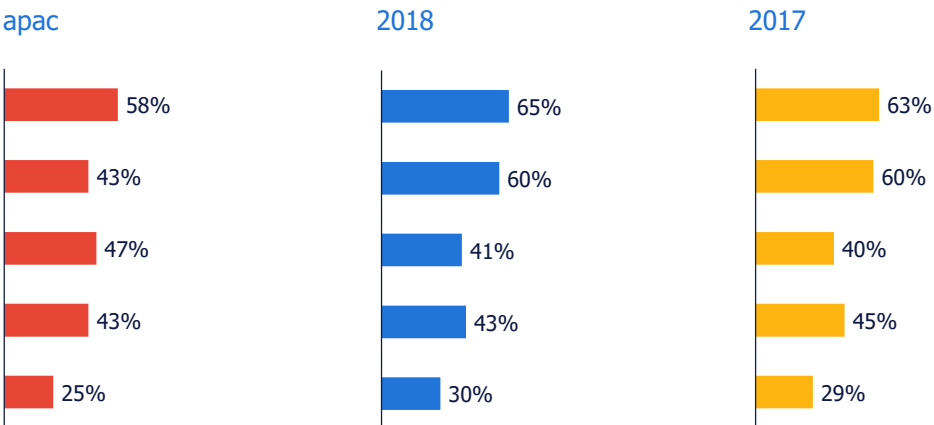
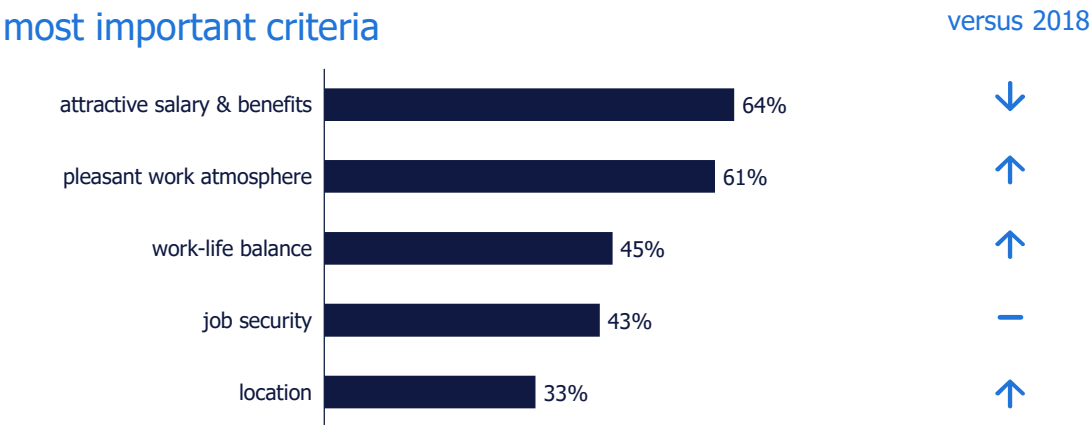
country

EVP drivers.

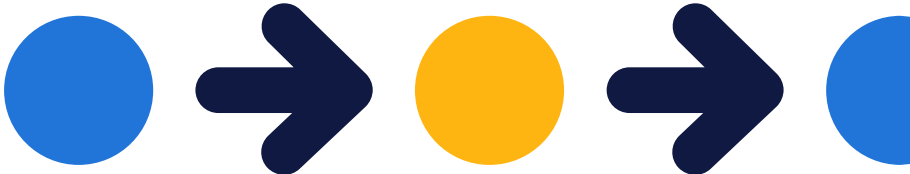


# what potential employees want when choosing an employer.

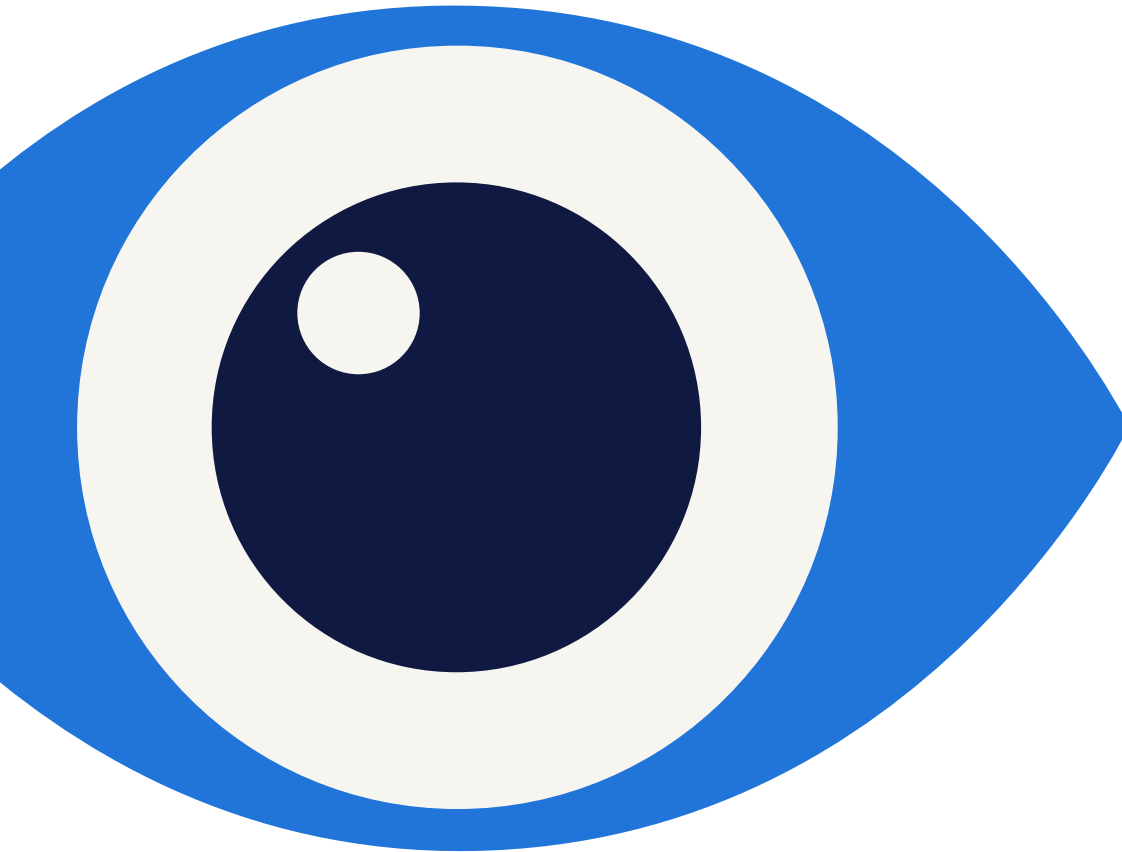
## most important criteria



[click here](#) for a breakdown of all results by socio-demographic profile and trends for the last 5 years.



# perception of employer offer in japan and the region.



Understanding the gap between what employees want and what they think employers offer in japan and in the region provides valuable insights into building an employer brand.

## employers in japan are perceived to offer.

- 1 very good reputation
- 2 job security
- 3 financially healthy
- 4 attractive salary & benefits
- 5 uses latest technologies
- 6 career progression
- 7 gives back to society
- 8 pleasant work atmosphere
- 9 interesting job content
- 10 work-life balance

## employers in apac are perceived to offer.

- 1 financially healthy
- 2 very good reputation
- 3 uses latest technologies
- 4 job security
- 5 attractive salary & benefits
- 6 career progression
- 7 gives back to society
- 8 pleasant work atmosphere
- 9 interesting job content
- 10 work-life balance

# gap between what (potential) employees seek and what employees perceive employers to offer in japan.

Employers in a country may not always be perceived to be offering what (potential) employees are looking for. Below you see the 3 main attributes employees look for but which they believe employers do not sufficiently offer.

---

## gap top 3

- 1 attractive salary & benefits
  - 2 pleasant work atmosphere
  - 3 work-life balance
- 



# what do potential employees want by generational profile.

gen z (18-24)

## 65%

of the gen z's are looking for an employer with a pleasant working atmosphere. This is higher when compared to older workforce.

gen x (35-54)

## 34%

of the gen x's find a convenient location a very important pull factor towards an employer. Among gen z and boomers, this factor is deemed less important.

millennials (25-34)

## 49%

of the millennials seek an employer that provides a good work-life balance. Older generations are less interested in this offering from their employer.

boomers (55-64)

## 40%

of the boomers are attracted to financially healthy companies. This is less so among the younger generations.



[click here](#) for a breakdown of all results by socio-demographic profile and trends for the last 5 years.



# important attributes by type of contract.

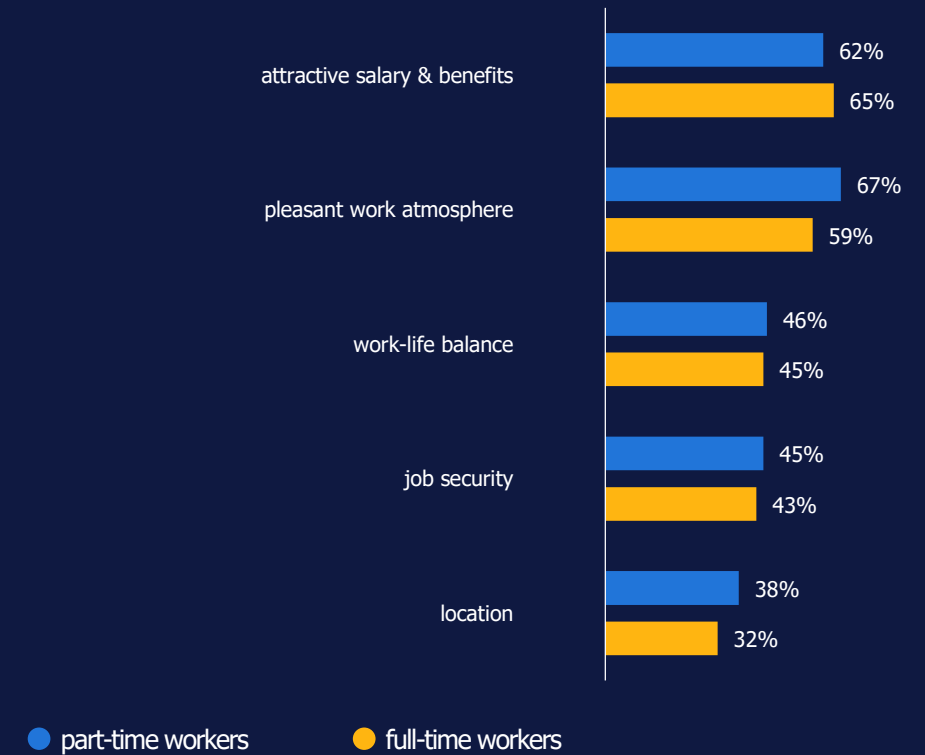


18%

of today's workforce  
works part-time.



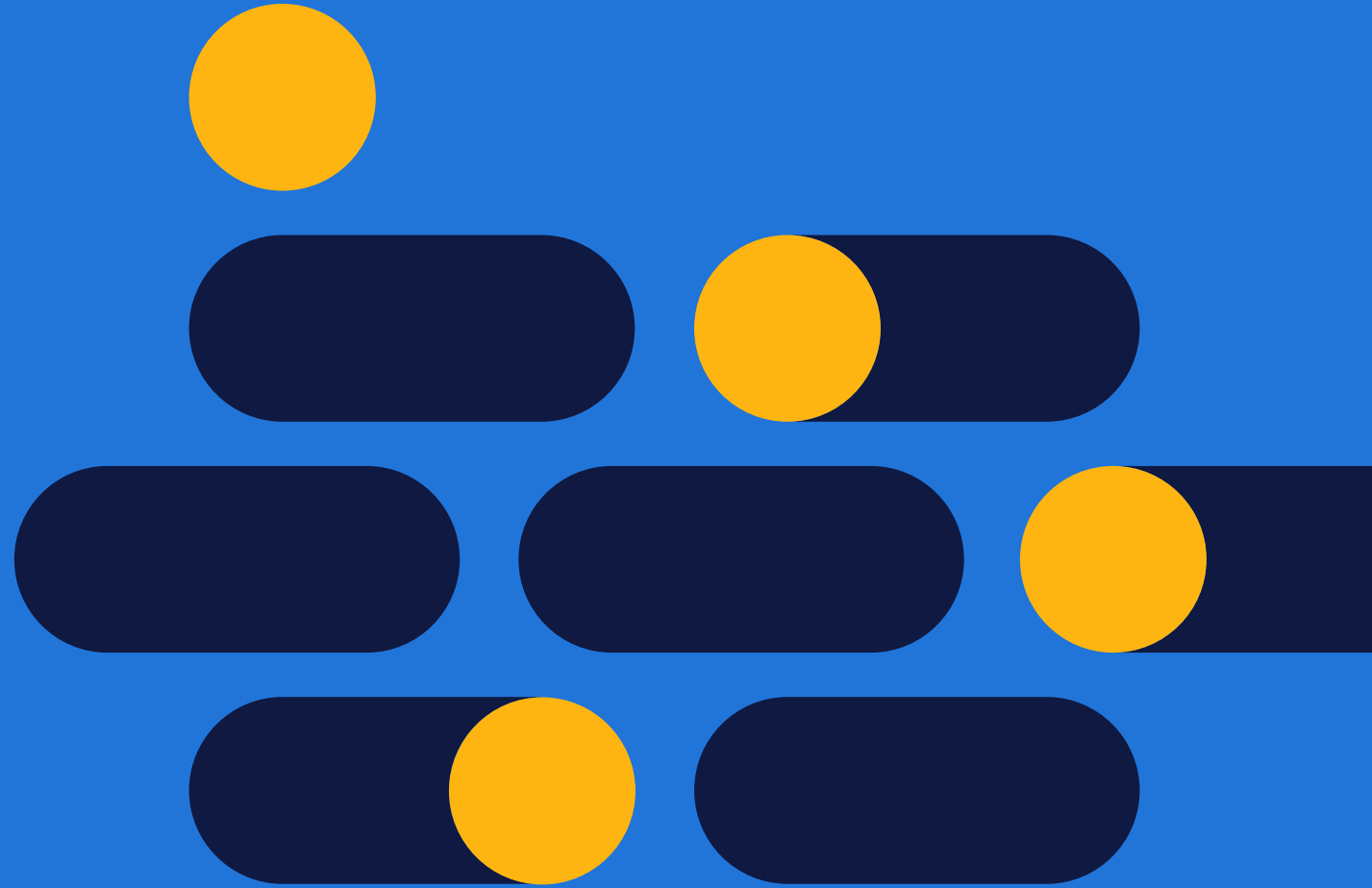
## most important attributes





# switchers and stayers

in focus.



# changing employer japan vs apac.

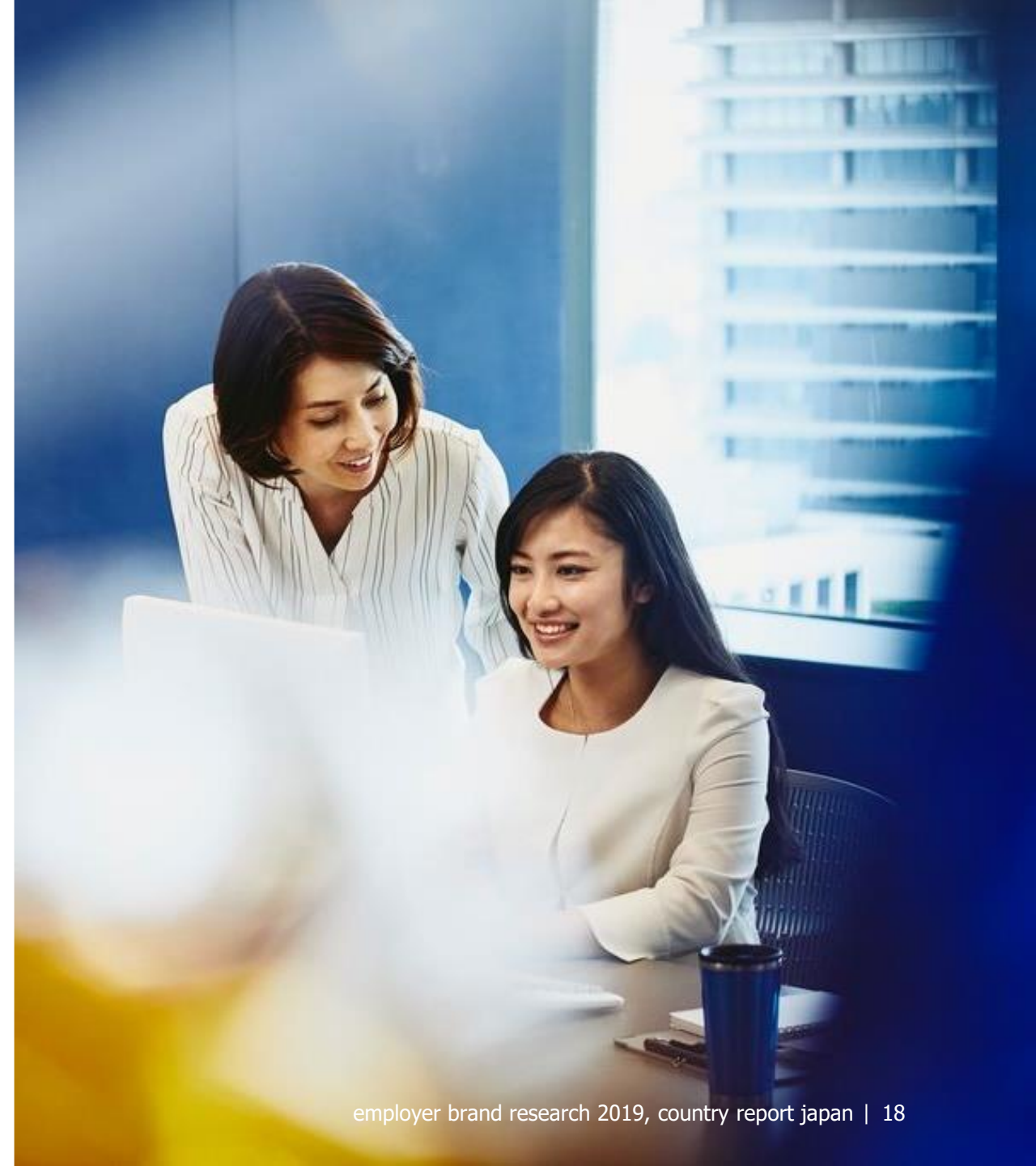
**switchers:** changed employer in the past year.



**stayers:** stayed with their employer in the past year.

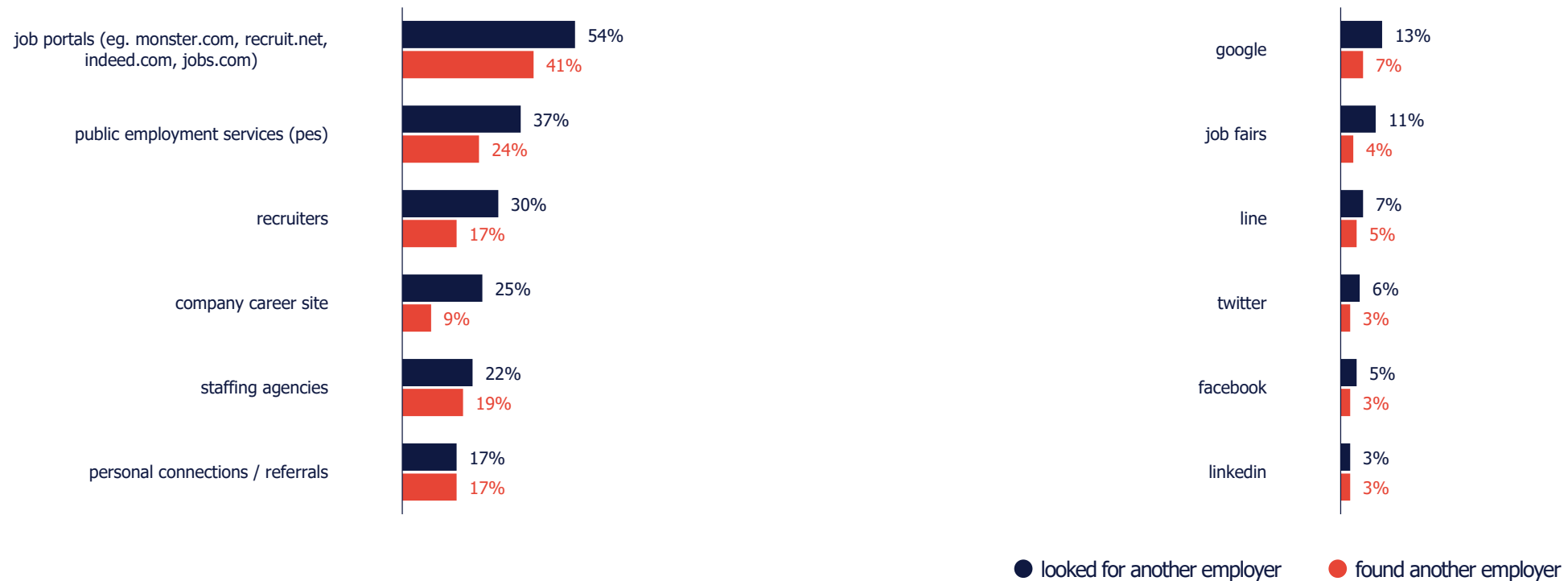


**intenders:** plan to change employer within the next year.

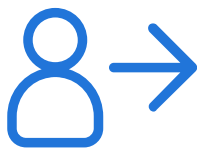


# how do the japanese workers look for and find employers.

## channels used to look for and find employers



# most important attributes switchers vs stayers.



11% (10%)\*

switchers: changed  
employer in  
the past year.



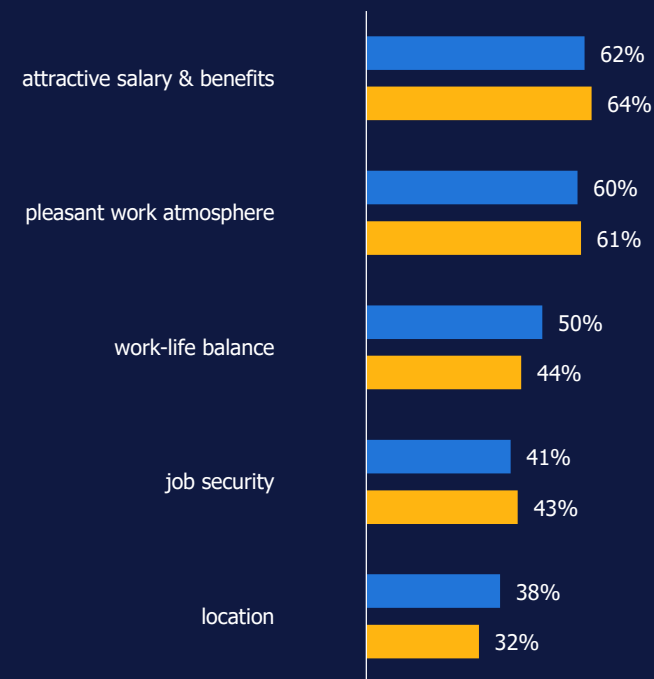
89% (90%)\*

stayers: stayed with their  
employer in  
the past year.

\*in 2018



## most important attributes



● switchers

● stayers

# most important attributes intenders.



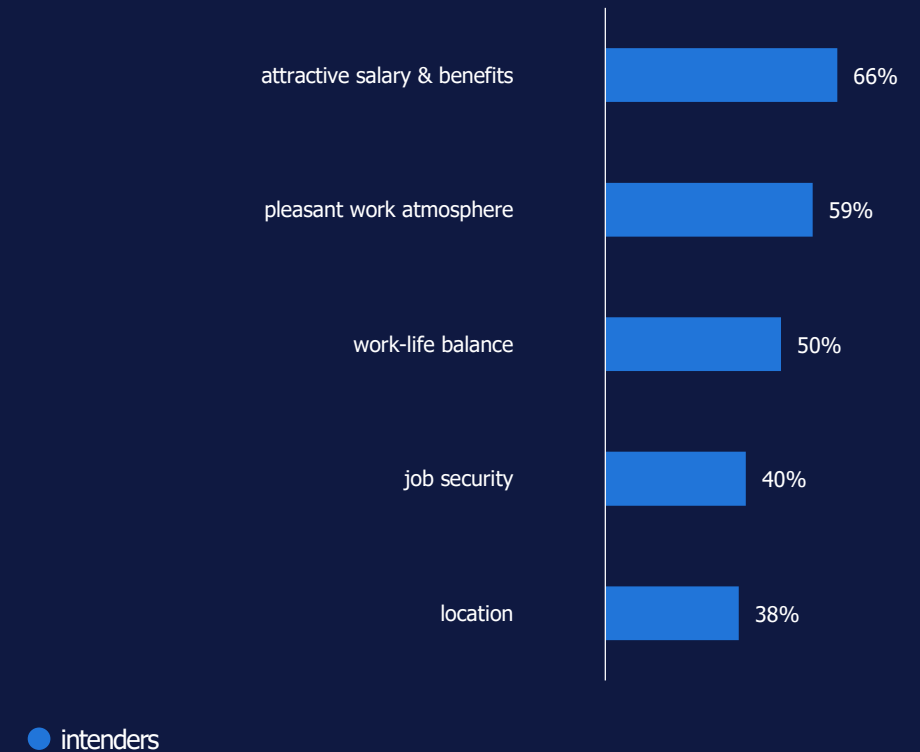
13% (13%)\*

intenders: plan to  
change employer  
within the next year.

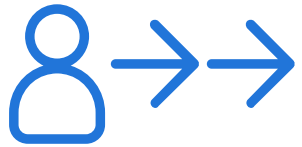
\*in 2018



## most important attributes



# channels to look for employers intenders.



**40%** (40%)\*

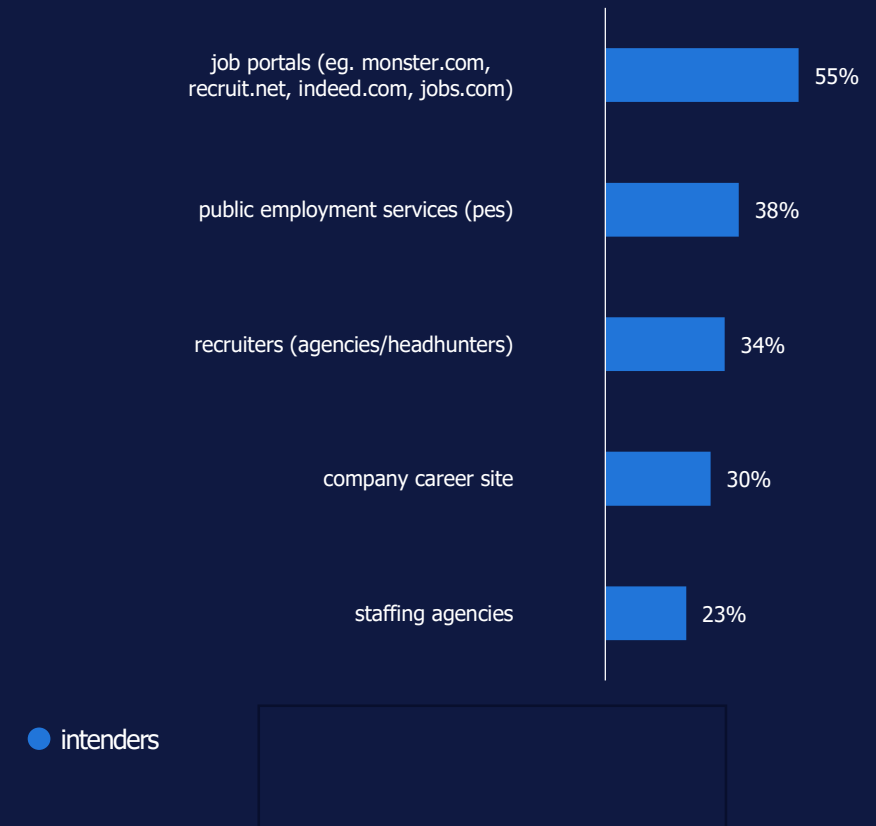
of last year's switchers\*\*  
intend to switch again  
next year.

\*\* n= 712 switched last year

\*in 2018



## channels to look for employers



# why do the japanese stay or leave.

## main reasons to stay

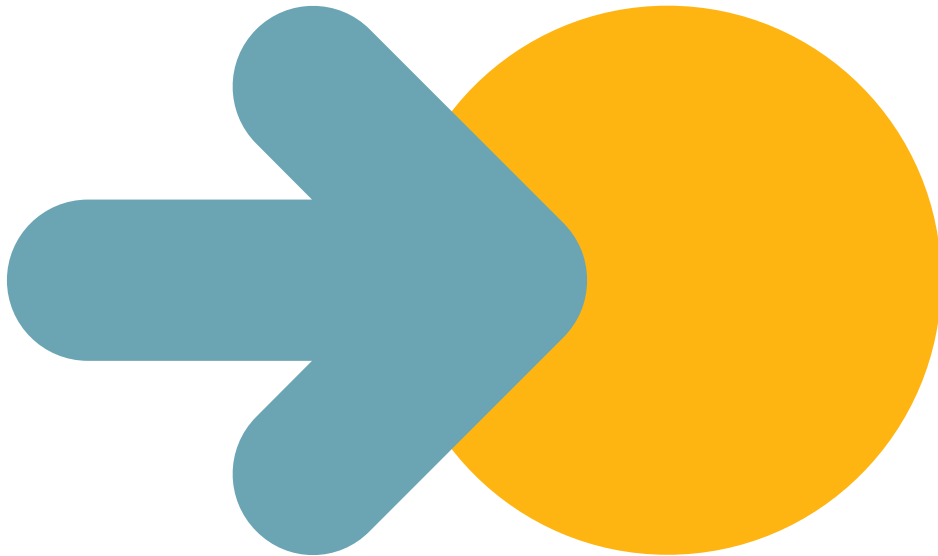


## main reasons to leave



# what factors do the japanese stay for

## reasons to stay, by profile.



gen z (18-24)

13%

of the gen z's are staying with their employer if they give back to society. This is higher when compared to older workforce.

gen x (35-54)

30%

of the gen x's stay with financially healthy employers. Among younger generations, this factor is deemed less important.

millennials (25-34)

39%

of the millennials stay if their employer offer flexible working arrangements. Gen z and gen x are less interested in this offering from their employer.

boomers (55-64)

35%

of the boomers are more likely to stay employers who show strong management. This is less so among younger generations.

[click here](#) for a breakdown of all results.



# what factors do the japanese leave for reasons to leave, by profile.

---

gen z (18-24)

41%

of the gen z's are likely to leave their employer because of low compensation and benefits. This is higher when compared to gen x and boomers.

---

gen x (35-54)

27%

of the gen x's leave if they lack career opportunities. Among gen z, this factor is deemed less important.

---

millennials (25-34)

25%

of the millennials leave if they lack sufficient flexible work options. Gen z and gen x are less interested in this offering from their employer.

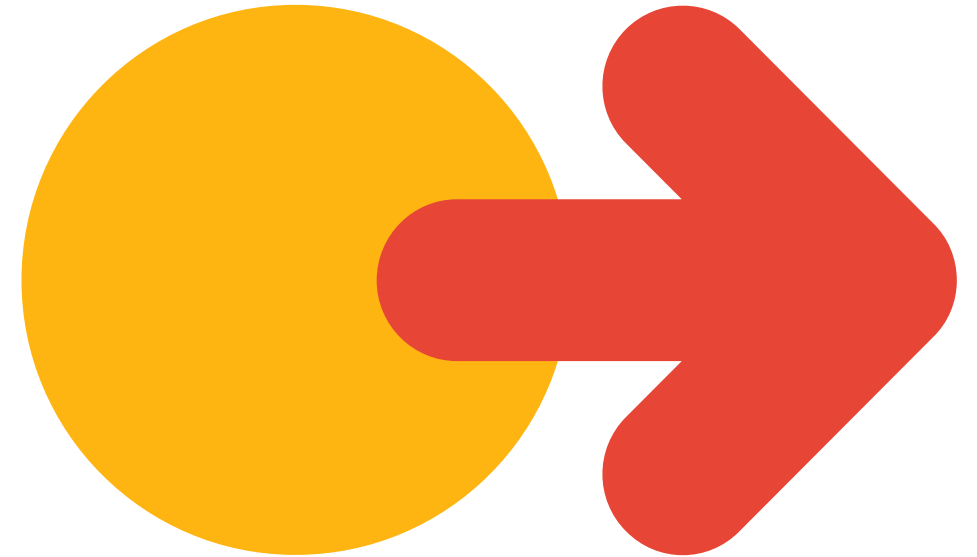
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boomers (55-64)

28%

of the boomers leave if they don't get enough recognition or rewards. This is less so among gen z.

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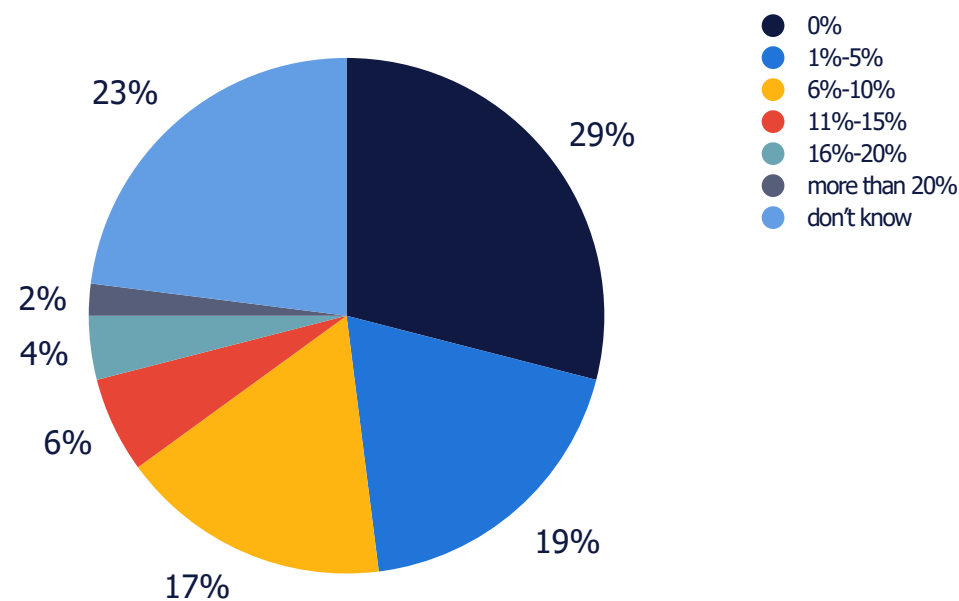


[click here](#) for a breakdown of all results.



# willingness to forfeit salary for more work security.

amount of salary employees are willing to forfeit



japan

12%

is willing to forfeit more than 10% of their salary in this exchange

apac

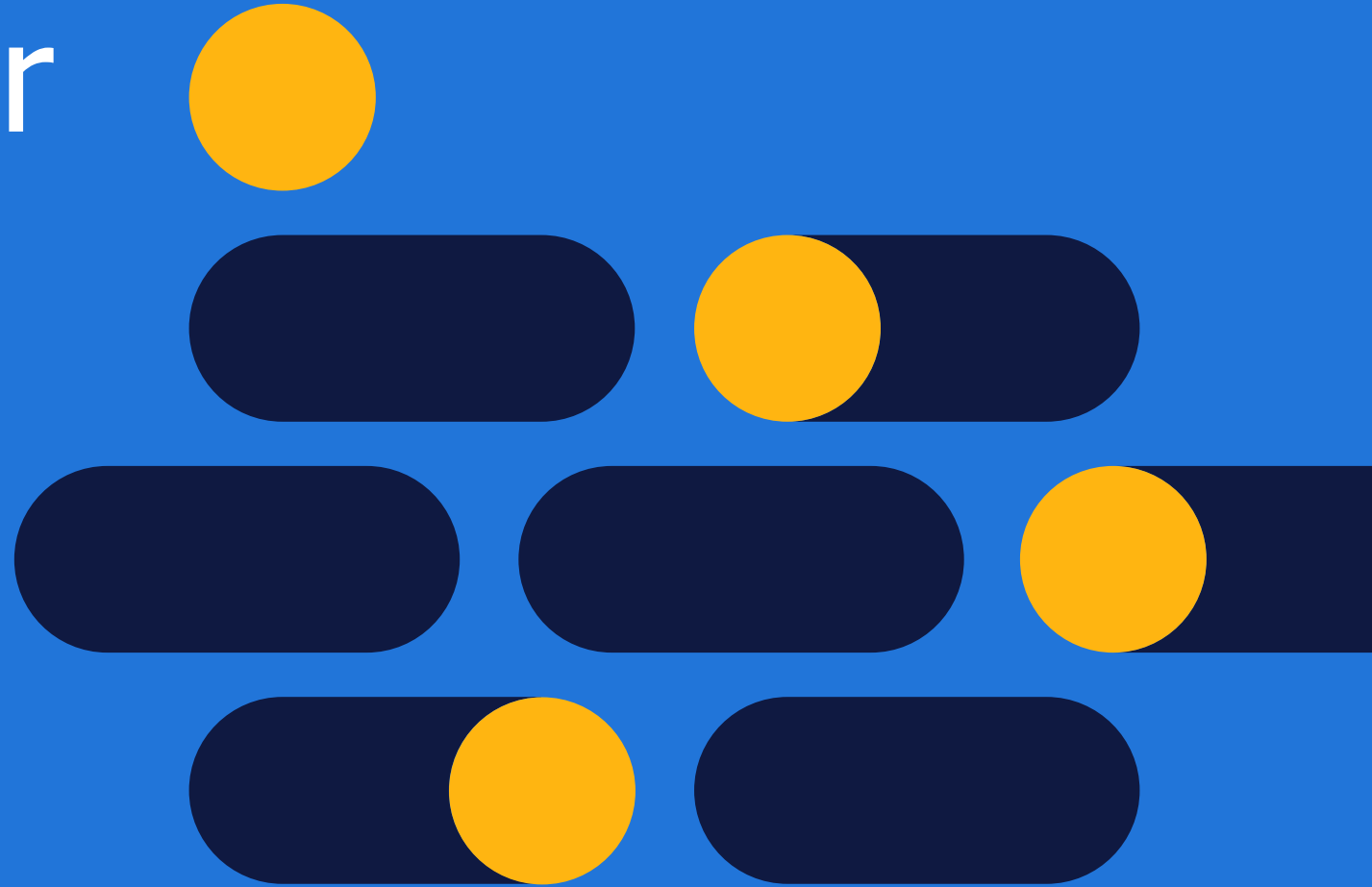
29%

is willing to forfeit more than 10% of their salary in this exchange



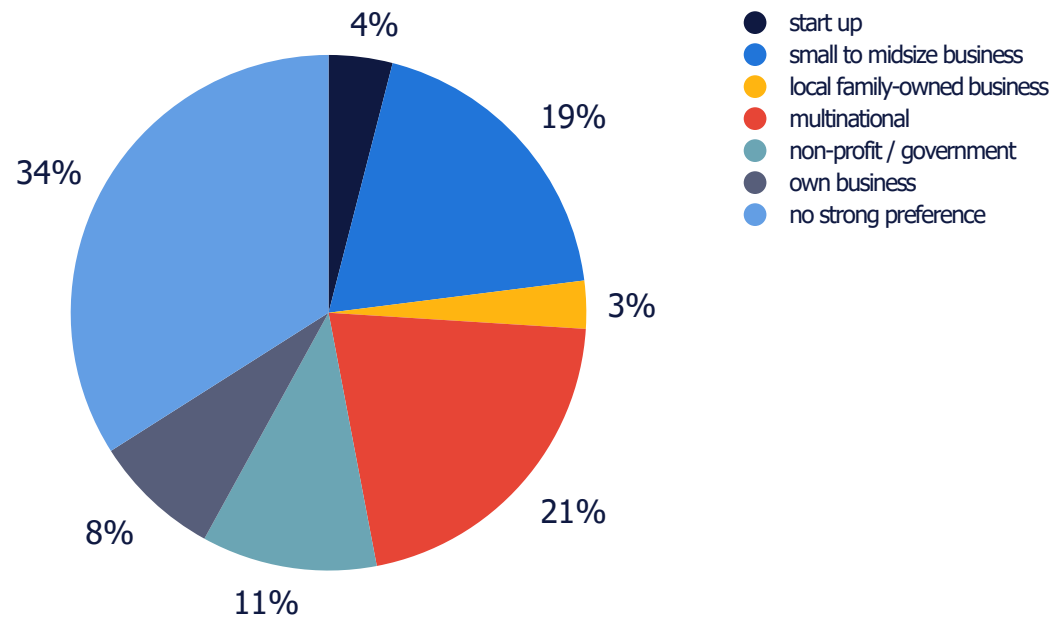
# ideal employer

in focus.



# 34% of the japanese have no strong preference for a certain type of company.

preferred company type



gen z (18-24)

21%

would prefer to work for a small  
to midsize business

gen x (35-54)

36%

have no strong preference

millennials (25-34)

26%

would prefer to work for a large  
(multinational) corporation

boomers (55-64)

43%

have no strong preference

# company type preference

## reasons why.

---

### multinational (21%)

financial health

job security

attractive salary & benefits

---

### own business (8%)

interesting job content

work-life balance

flexible arrangements

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### small to midsize business (19%)

pleasant work atmosphere

job security

work-life balance

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### start-up (4%)

interesting job content

career progression

diversity & inclusion

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### non-profit / government (11%)

job security

attractive salary & benefits

financial health

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### local family-owned (3%)

pleasant work atmosphere

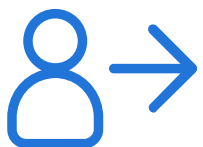
job security

work-life balance

---



# company type preference switchers vs stayers.



24%

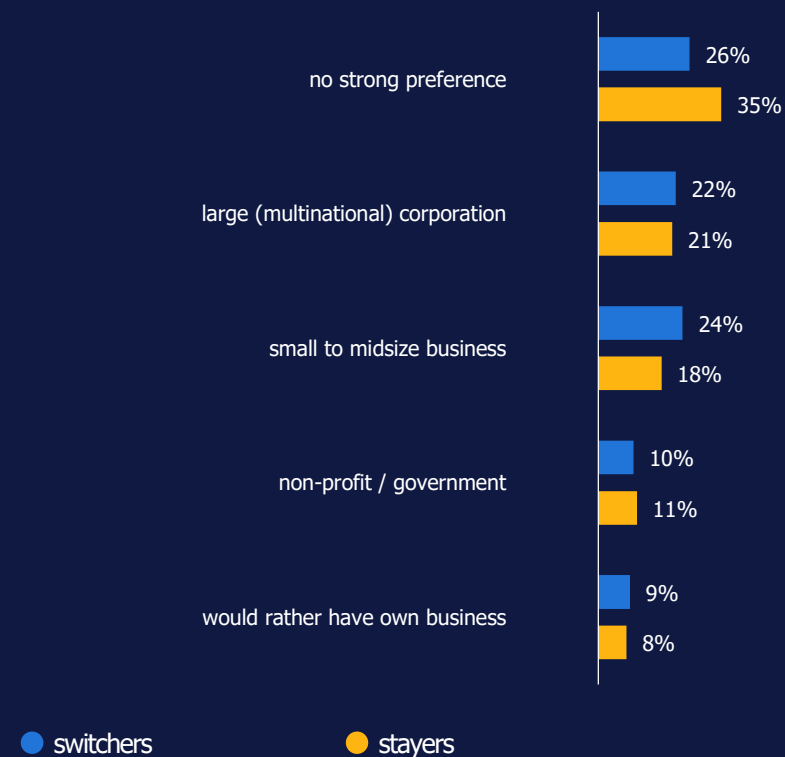
of the switchers prefer  
a small to midsize  
business.



35%

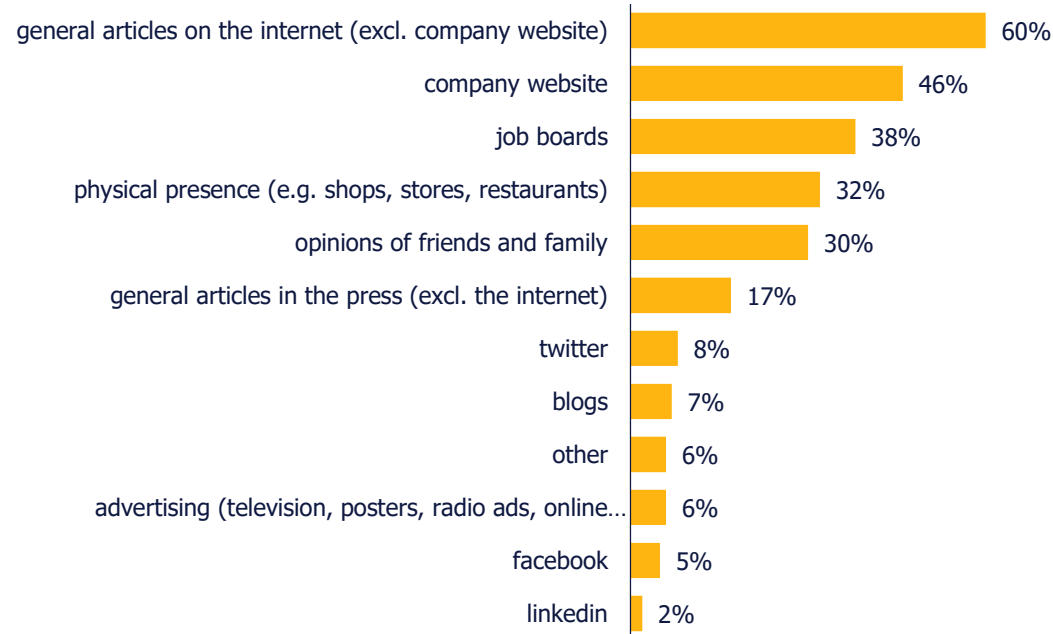
of the stayers have  
no strong preference.

## company type preference



# 88% of the japanese check potential employer's reputation.

## channels for reputation check



## most often used

gen z (18-24)

52%

Company website

gen x (35-54)

60%

general articles on the internet  
(excl. company website)

millennials (25-34)

65%

general articles on the internet  
(excl. company website)

boomers (55-64)

25%

general articles in the press  
(excl. internet)

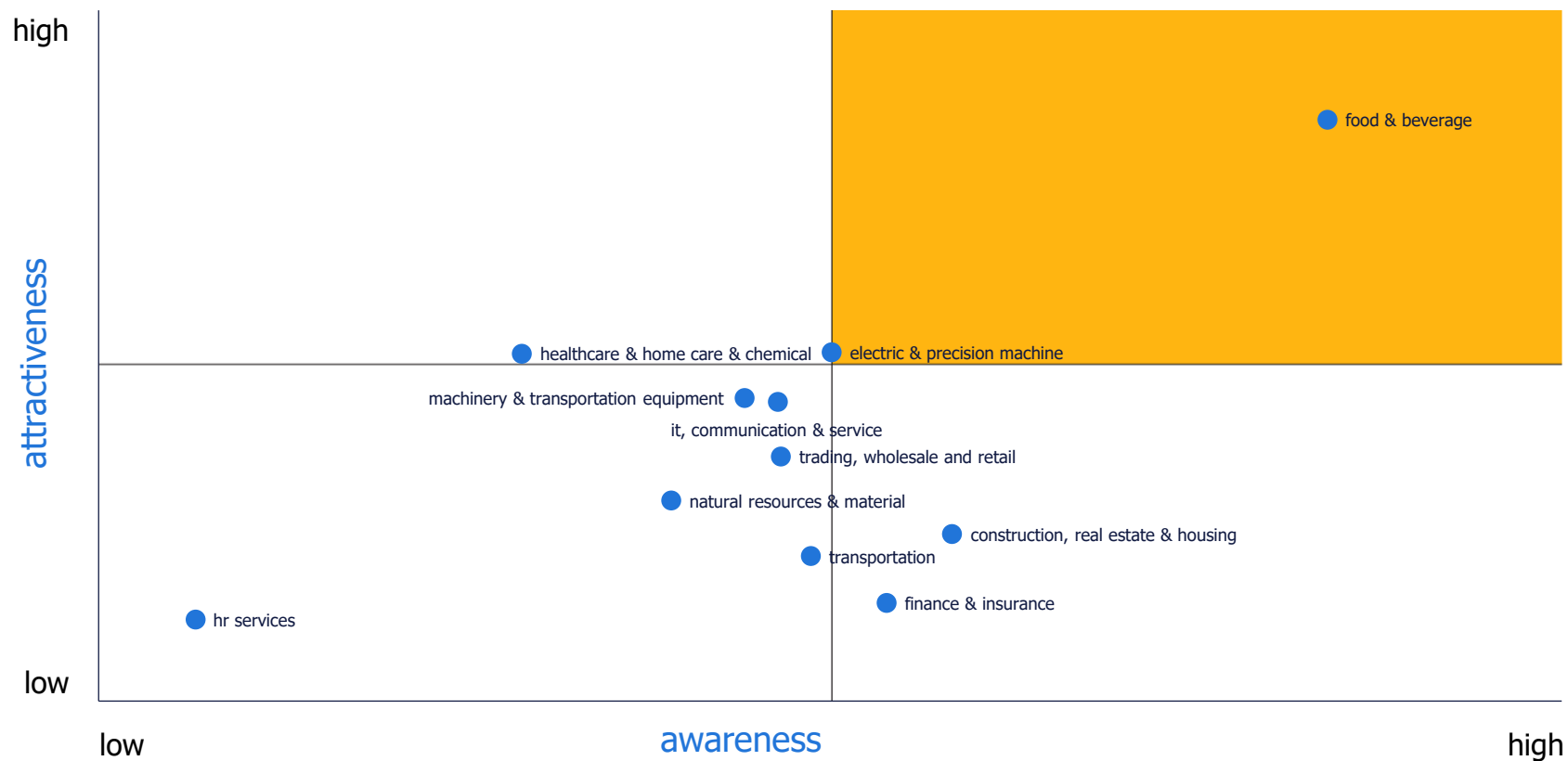
sector



insights.



# top performing sectors in japan by awareness and attractiveness.



## high awareness

Having a high awareness means that employers in the sector are widely known.

## high attractiveness

A sector with high attractiveness contains more highly attractive companies than other sectors.

# japan's sectors score best on these 3 EVP drivers.

		top 3 EVP drivers		
sector		1	2	3
01	food & beverage	very good reputation	job security	financially healthy
02	electric & precision machine	very good reputation	uses latest technologies	attractive salary & benefits
03	healthcare & home care & chemical	very good reputation	attractive salary & benefits	uses latest technologies
04	machinery & transportation equipment	very good reputation	uses latest technologies	job security
05	it, communication & service	very good reputation	uses latest technologies	career progression
06	trading, wholesale and retail	very good reputation	financially healthy	career progression
07	natural resources & material	very good reputation	job security	attractive salary & benefits
08	construction, real estate & housing	very good reputation	job security	financially healthy
09	transportation	very good reputation	job security	financially healthy
10	finance & insurance	very good reputation	financially healthy	attractive salary & benefits
11	hr services	career progression	attractive salary & benefits	financially healthy

top



employers.

# top employers in japan.

## top 10 employers 2019

---

- 01 SUNTORY HOLDINGS LIMITED
  - 02 AJINOMOTO CO., INC.
  - 03 Toyota Motor Corporation
  - 04 SONY CORPORATION
  - 05 PANASONIC CORPORATION
  - 06 RAKUTEN,INC.
  - 07 KIRIN HOLDINGS COMPANY, LIMITED
  - 08 NISSIN FOOD HOLDINGS CO., LTD.
  - 09 KAO CORPORATION
  - 10 ASAHI GROUP HOLDINGS,LTD.
- 

## top 10 employers 2018

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- 01 PANASONIC CORPORATION
  - 02 Toyota Motor Corporation
  - 03 NISSIN FOOD HOLDINGS CO., LTD.
  - 04 SONY CORPORATION
  - 05 AJINOMOTO CO., INC.
  - 06 ALL NIPPON AIRWAYS CO., LTD.
  - 07 JAPAN AIRLINES CORPORATION
  - 08 MEIJI HOLDINGS CO., LTD.
  - 09 CANON INC.
  - 10 RAKUTEN,INC.
-

# japan's top companies

## top 3 EVP drivers of the top 5 companies.

top 5 companies	top 3 EVP drivers		
	1	2	3
1 SUNTORY HOLDINGS LIMITED	very good reputation	job security	financially healthy
2 AJINOMOTO CO., INC.	very good reputation	job security	financially healthy
3 Toyota Motor Corporation	very good reputation	uses latest technologies	financially healthy
4 SONY CORPORATION	very good reputation	uses latest technologies	attractive salary & benefits
5 PANASONIC CORPORATION	very good reputation	uses latest technologies	financially healthy

# top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	Toyota Motor Corporation	ITOCHU CORPORATION	MITSUI & CO., LTD.
career progression	Toyota Motor Corporation	RAKUTEN,INC.	SUNTORY HOLDINGS LIMITED
financially healthy	Toyota Motor Corporation	SUNTORY HOLDINGS LIMITED	TOYOTA INDUSTRIES CORPORATION
gives back to society	SUNTORY HOLDINGS LIMITED	Toyota Motor Corporation	TOTO
interesting job content	SUNTORY HOLDINGS LIMITED	RAKUTEN,INC.	PANASONIC CORPORATION
job security	Toyota Motor Corporation	SUNTORY HOLDINGS LIMITED	AJINOMOTO CO., INC.
pleasant work atmosphere	SUNTORY HOLDINGS LIMITED	H2O RETAILING CORPORATION	NISSIN FOOD HOLDINGS CO., LTD.
uses latest technologies	Toyota Motor Corporation	PANASONIC CORPORATION	SONY CORPORATION
very good reputation	Toyota Motor Corporation	SUNTORY HOLDINGS LIMITED	SONY CORPORATION
work-life balance	TIS	SUNTORY HOLDINGS LIMITED	AJINOMOTO CO., INC.

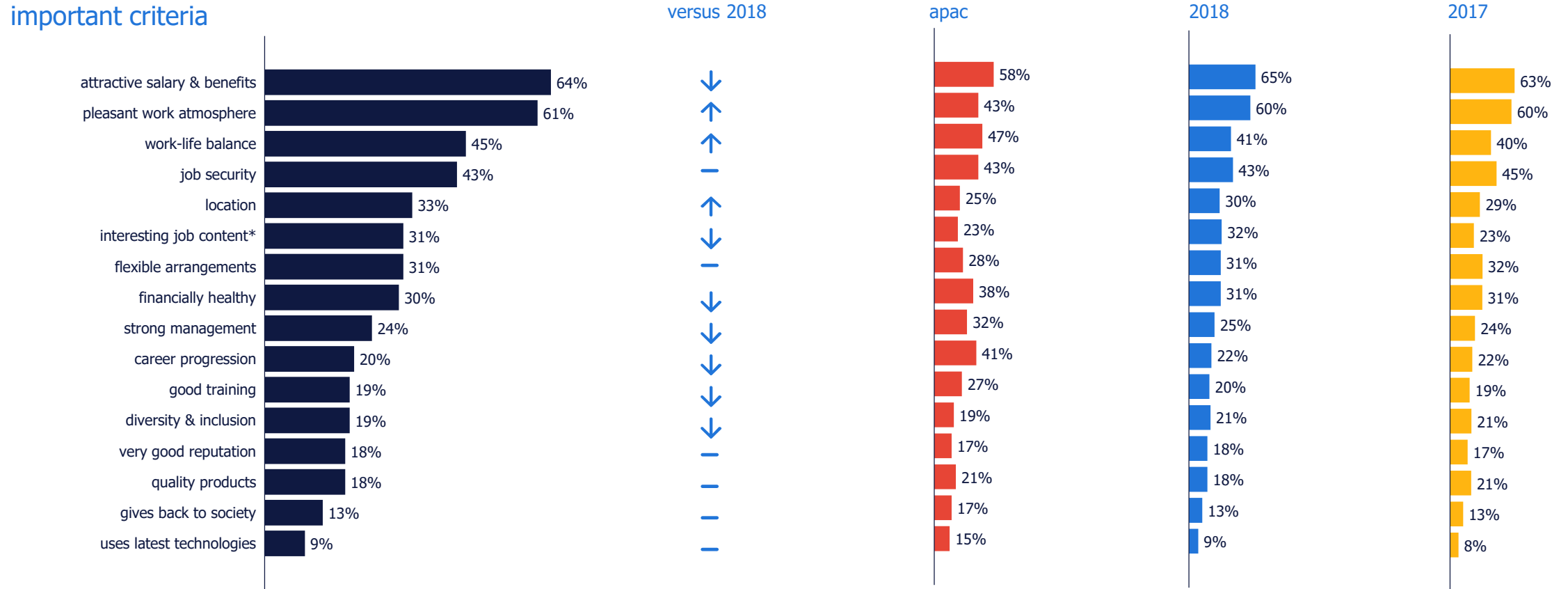
deep dive

appendix 1.



# what potential employees want

## the most important criteria when choosing an employer.



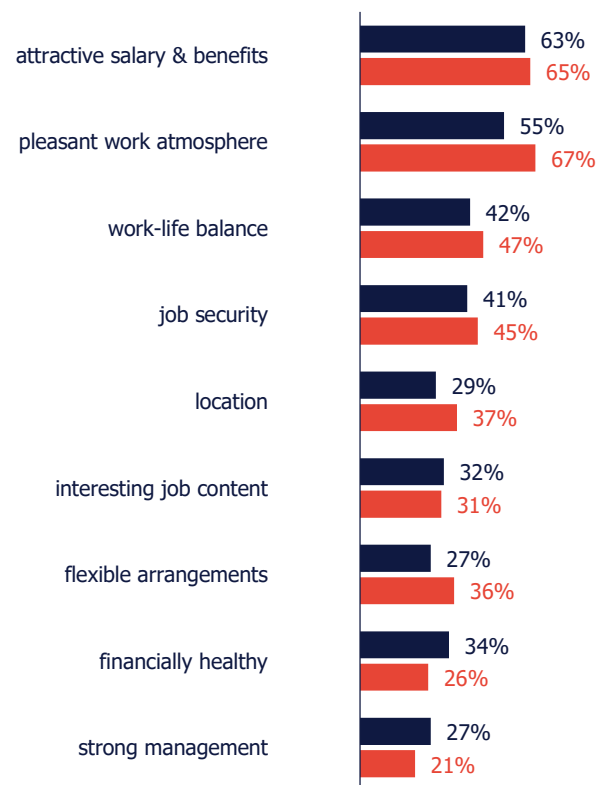
Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.

\*2017: work that is stimulating and challenging



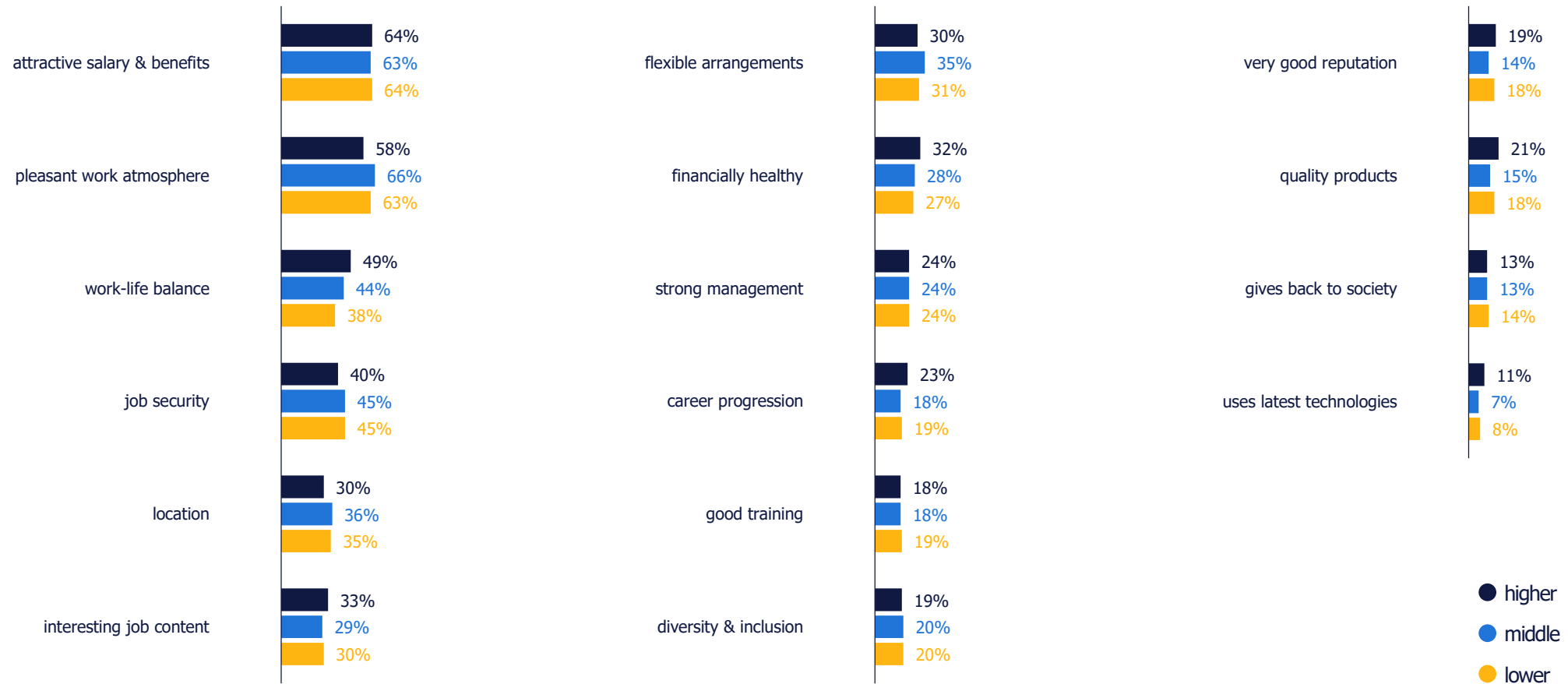


# EVP driver importance by gender.

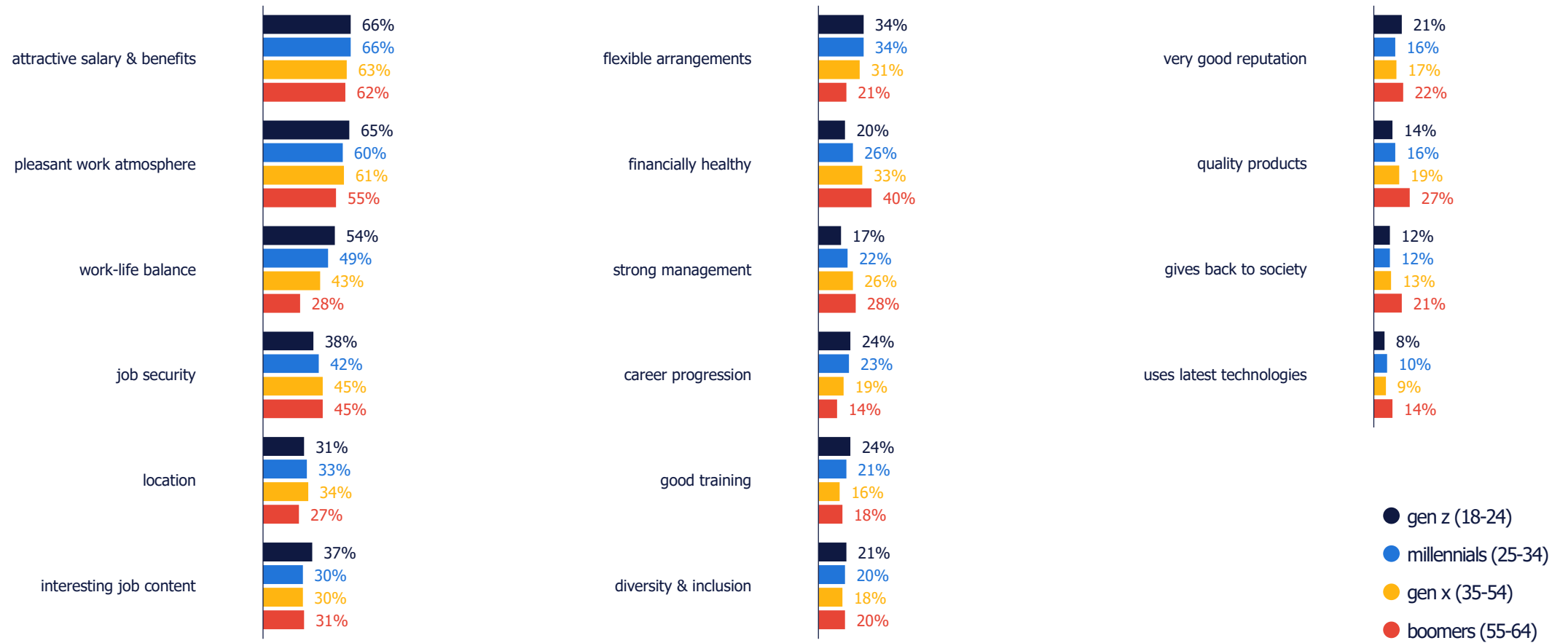


● male  
● female

# EVP driver importance by education.



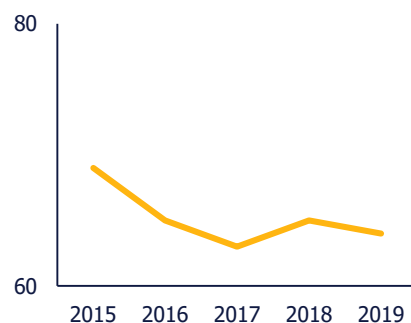
# EVP driver importance by age.



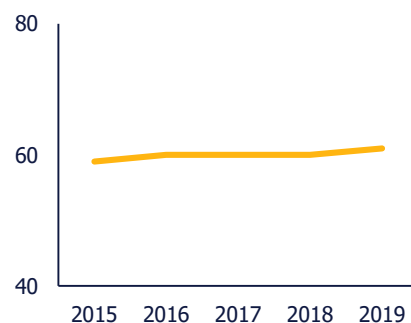
# EVP driver importance trends, total.

1/2

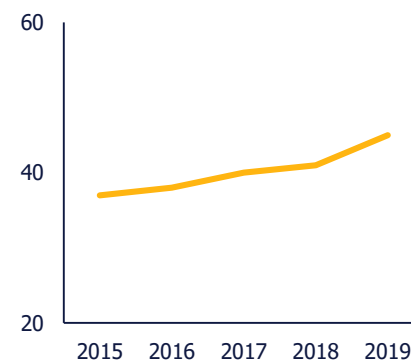
attractive salary & benefits



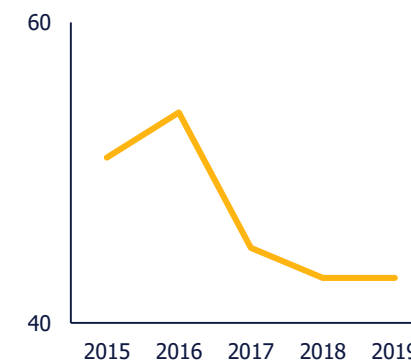
pleasant work atmosphere



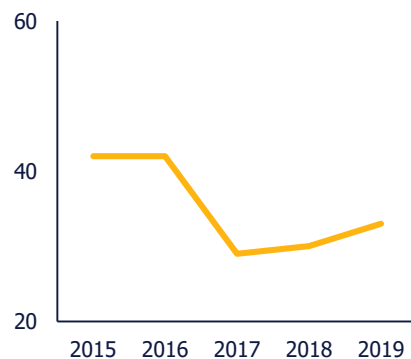
work-life balance



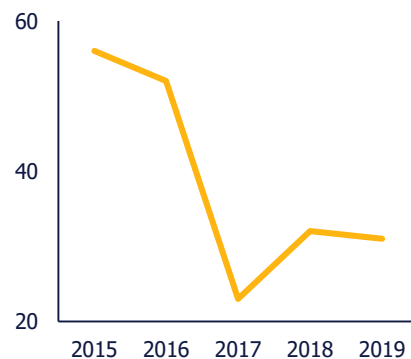
job security



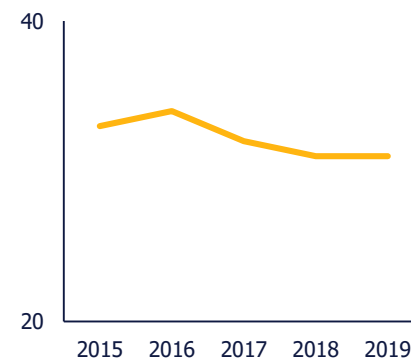
location



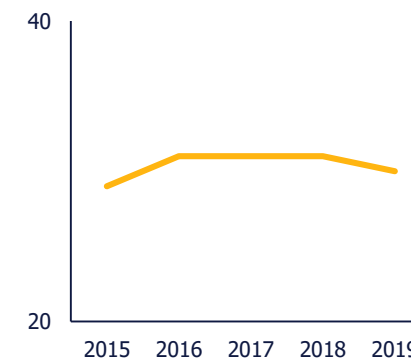
interesting job content\*



flexible arrangements



financially healthy



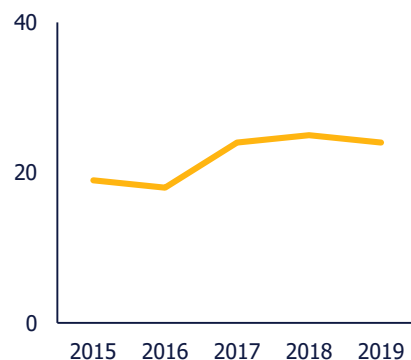
\*2017: work that is stimulating and challenging



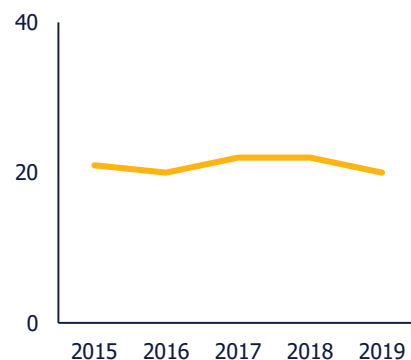
# EVP driver importance trends, total.

2/2

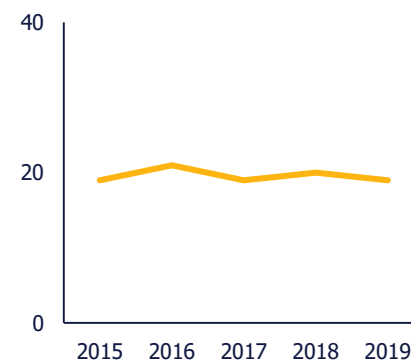
strong management



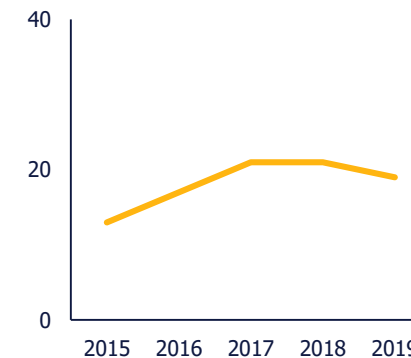
career progression



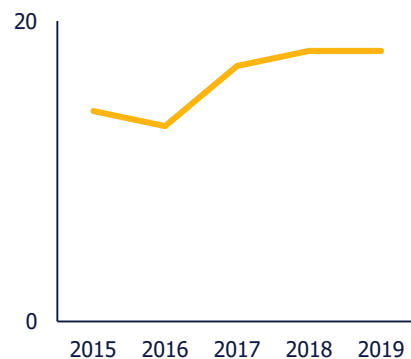
good training



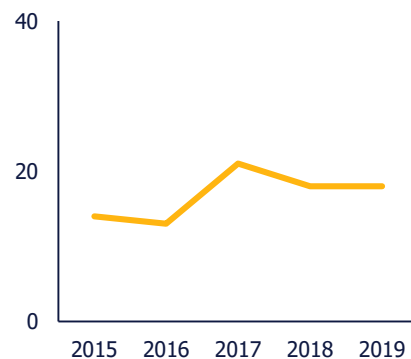
diversity & inclusion



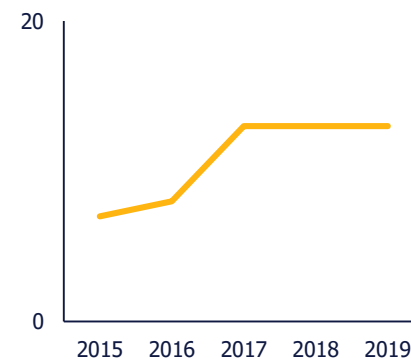
very good reputation\*



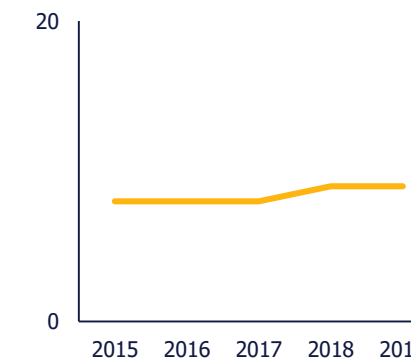
quality products



gives back to society



uses latest technologies

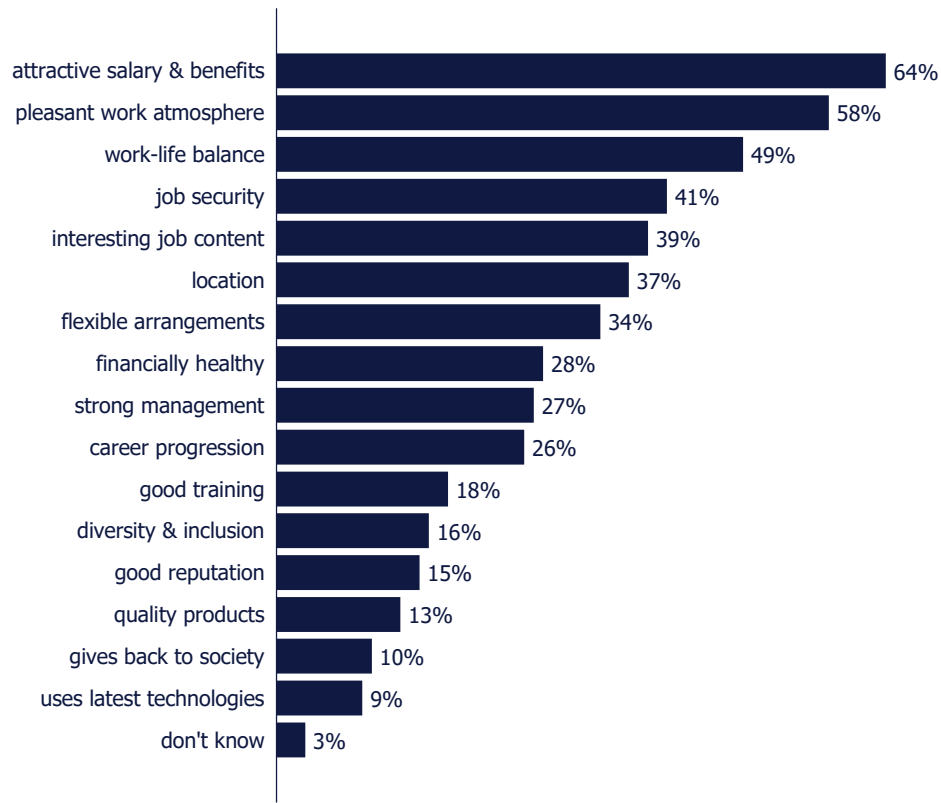


\*previous to 2017: strong image/strong values

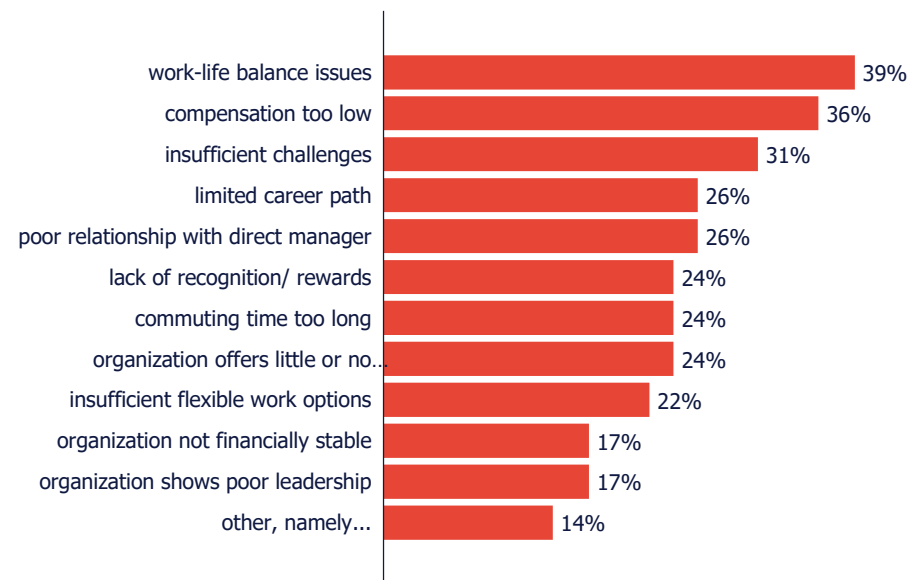


# what factors do the japanese stay or leave for.

## reasons to stay



## reasons to leave



# methodology

## appendix 2.



# methodology

## why smart sampling?

Since REBR 2017 companies are evaluated between 140 and 400 respondents. The actual number of evaluations per company depends on the awareness of the company.

The error margin is determined by the % of respondents giving a certain answer and the sample size to which the question has been asked. The highest error margin occurs when 50% of the respondents give a certain answer. The error margin is lower when 30% (or 70%) of the respondents give a certain answer.

### example

140 respondents have evaluated company X. Of these 140, 50% find the company nice to work for. Taking the error margin at  $n=140/50\%$  into account, the real answer lies between 42% and 58%.

400 respondents have evaluated company Y and of these 400, 50% finds the company nice to work for. Taking the error margin at  $n=400/50\%$  into account, the real answer lies between 45% and 55%.

1200 respondents have evaluated company Z and of these 1200, 50% finds the company nice to work for. Taking into account the error margin at  $n=1200/50\%$ , the real answer lies between 47% and 53%.

Therefore, the difference in error margin is very small between  $n=1200$  and  $n=400$  evaluations per company (5% margin vs 3% margin at the most). As such it can be concluded that maximum 400 evaluations per company are sufficient in order to determine a reliable attractiveness per company.

In practice, this means that every company with an awareness over 35% will have max 400 respondents evaluating the company. Companies with an awareness below 35% will be evaluated by 140 to 400 people (depending on awareness).





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# company specific slide.

## your company

- What does it do/ what is it known for
- Active in x countries: name countries

## few facts about their EVP (if any)

- Abc
- Abc

## how can the RS consultant help them

- Ipient re laceatu riateni temquis coraectem volorro totasi ipsam dis sum quissinvenis enisti ut faccae.
- Obita qui qui as modisque pos est re, officataque dem ut atur sum nis assi nimo vollab ilit ratus, vid ut volo rem la idebis etur ressi deri dolo bearum remporenis.
- Alita ex ellupta tecusam que non repuda nimpe solum am dolecti re il ipsam fugiam volorum quam.



# let's talk.

Our research has many insightful, but complex insights so we'd love the opportunity to walk you through this document, share our thoughts and answer any questions you might have.



name organization  
name contact  
person



name organization  
name contact  
person



name organization  
name contact  
person



name organization  
name contact  
person

randstad

human forward.

