

employer  
brand research  
2019



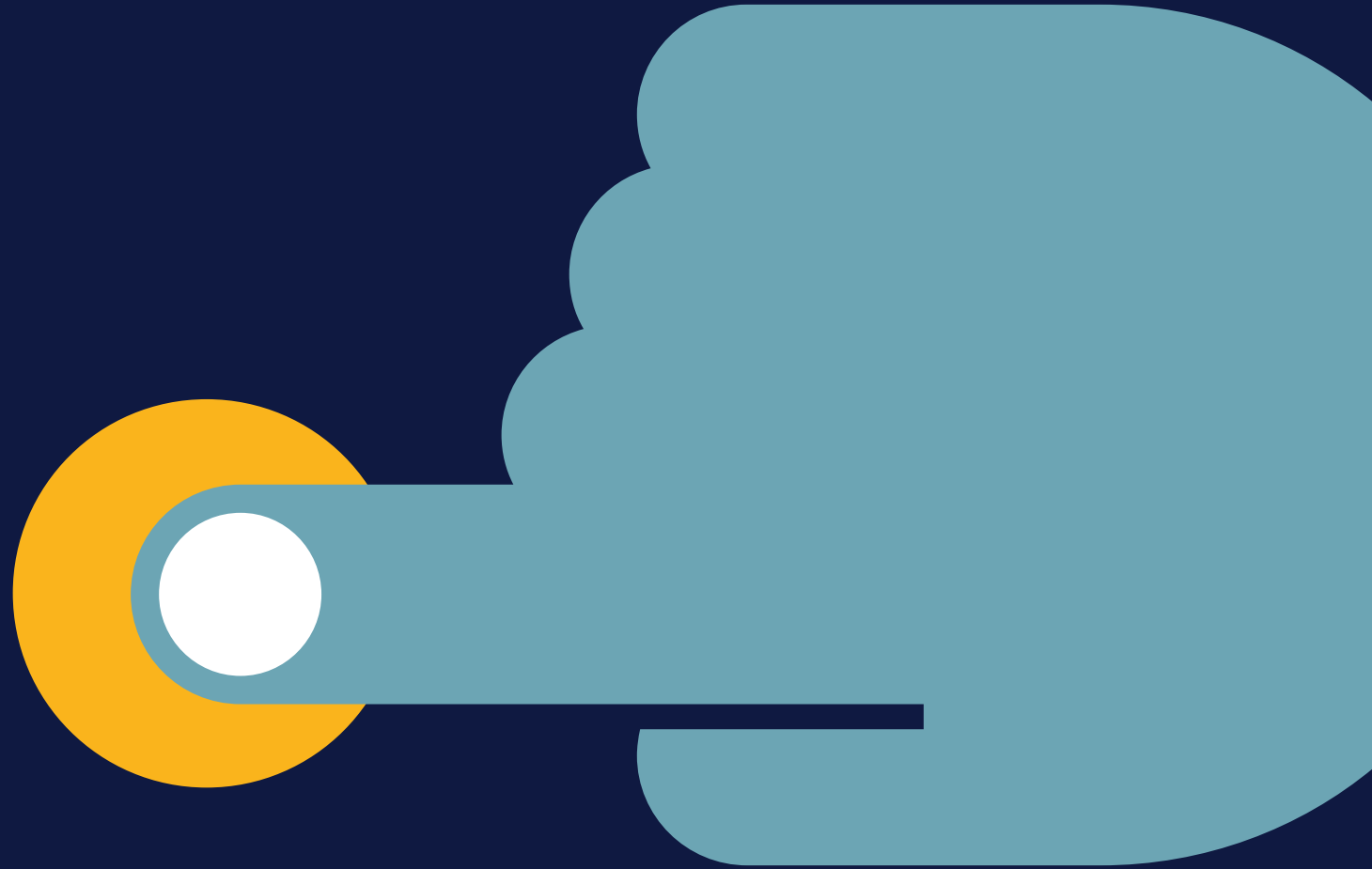
country report  
china.

# 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

- 3,441 respondents

## fieldwork

- online interviews
- between 18 and 27 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.

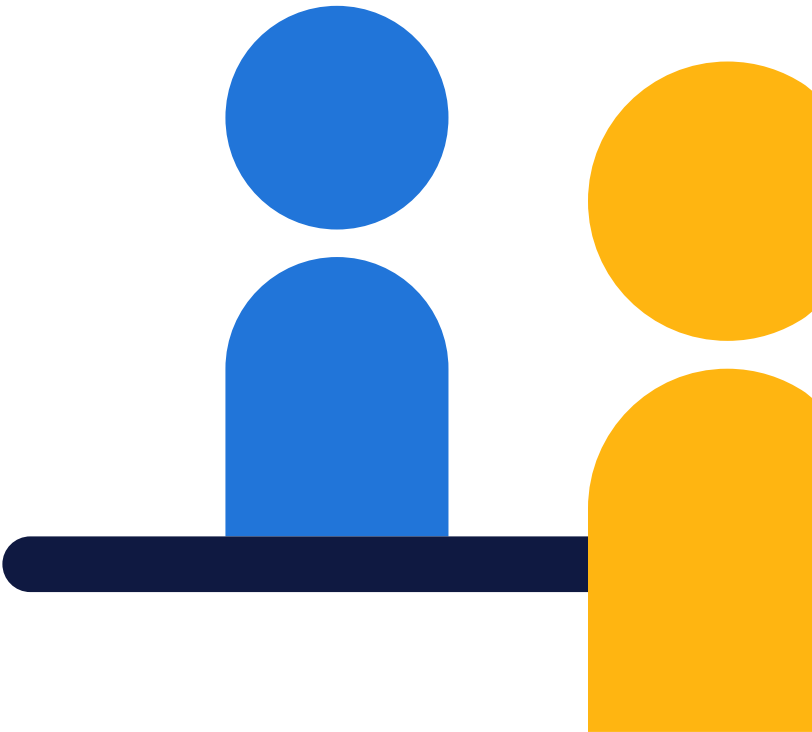
In order to make sure that the less well known brands are assessed by a sufficient number of respondents, we make use of a smart sampling method.

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.





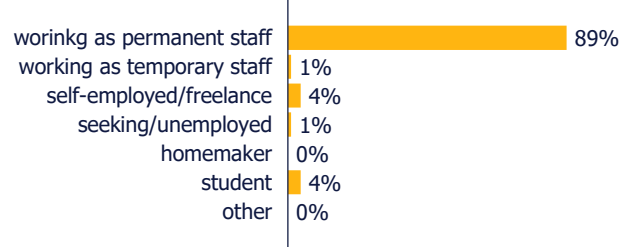
# sample composition in china

## socio-demographics, employment situation, region.

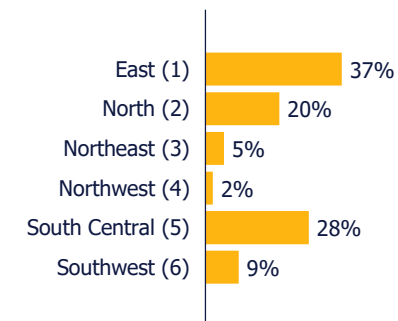
### gender



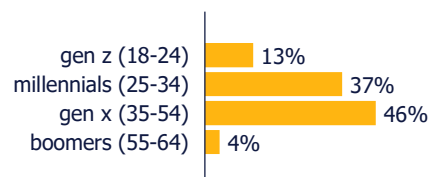
### situation



### region



### age



### education



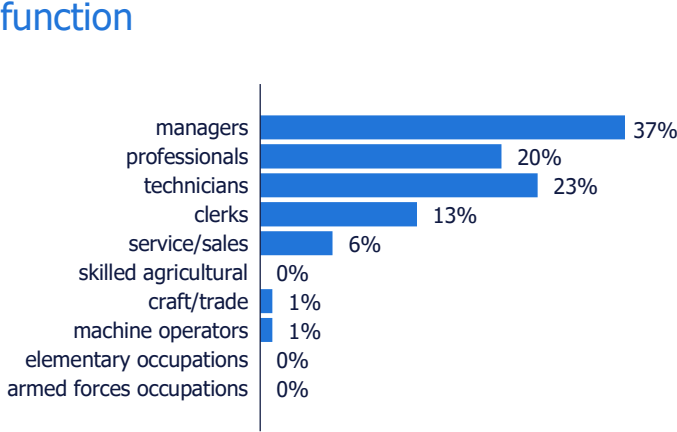
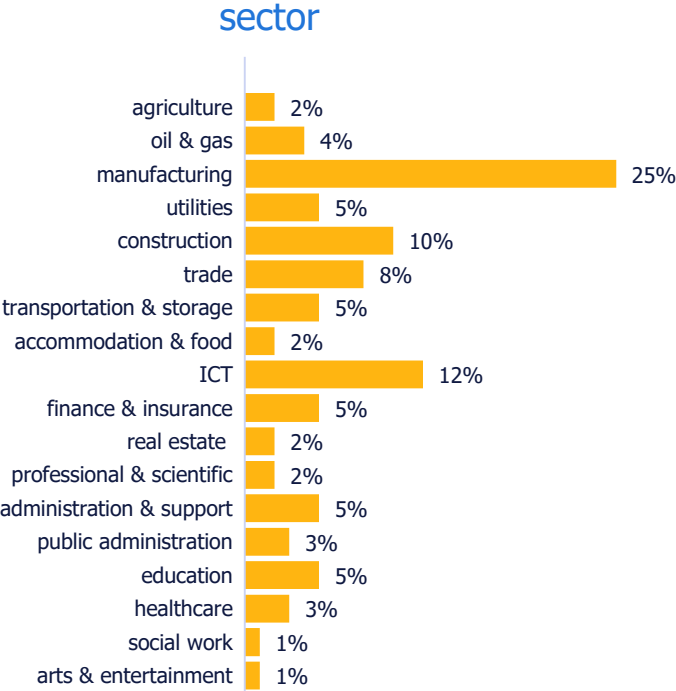
1. Anhui, Fujian, Jiangsu, Jiangxi, Shandong, Shanghai, Zhejiang
2. Beijing, Hebei, Inner Mongolia, Shanghai, Shanxi, Tianjin
3. Heilongjiang, Jilin, Liaoning
4. Gansu, Ningxia, Shaanxi, Qinghai, Xinjiang
5. Guangdong, Guangxi, Henan, Hubei, Hunan, Macau
6. Chongqing, Guizhou, Shanxi, Sichuan, Yunnan

total sample: 3,441

fieldwork: between 18 and 27 december 2018



# sample composition in china

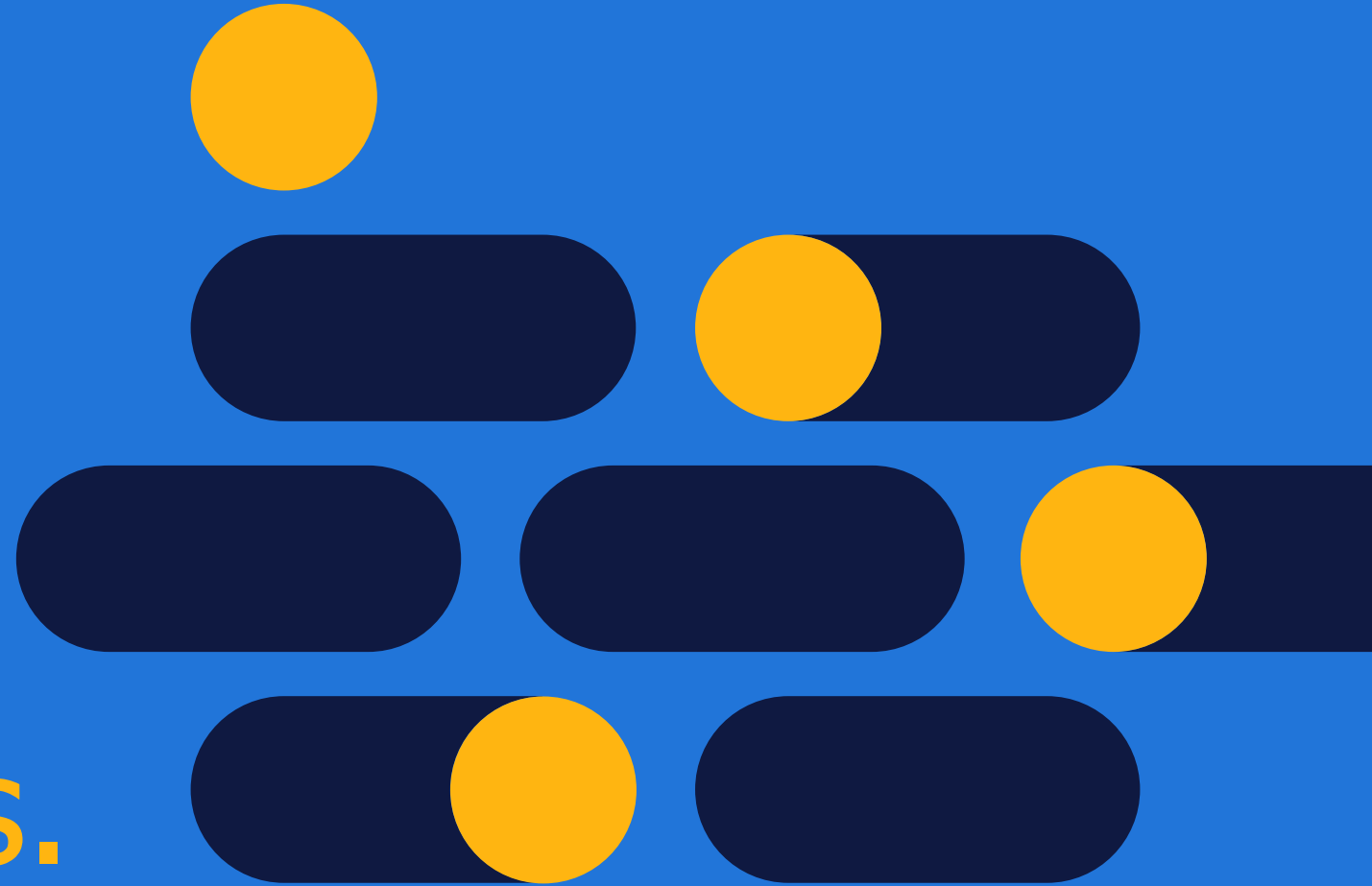


base: currently employed (n=3,231)



country

EVP drivers.



# what potential employees want when choosing an employer.

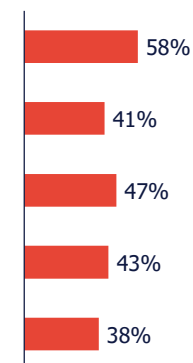
## most important criteria



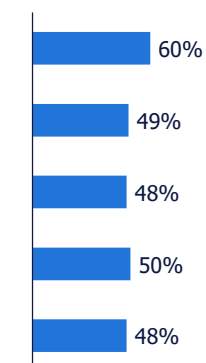
versus 2018



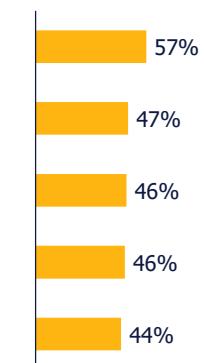
apac



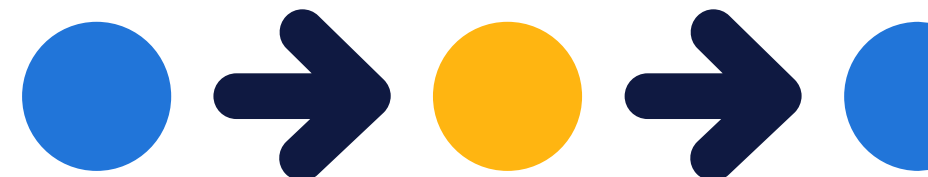
2018



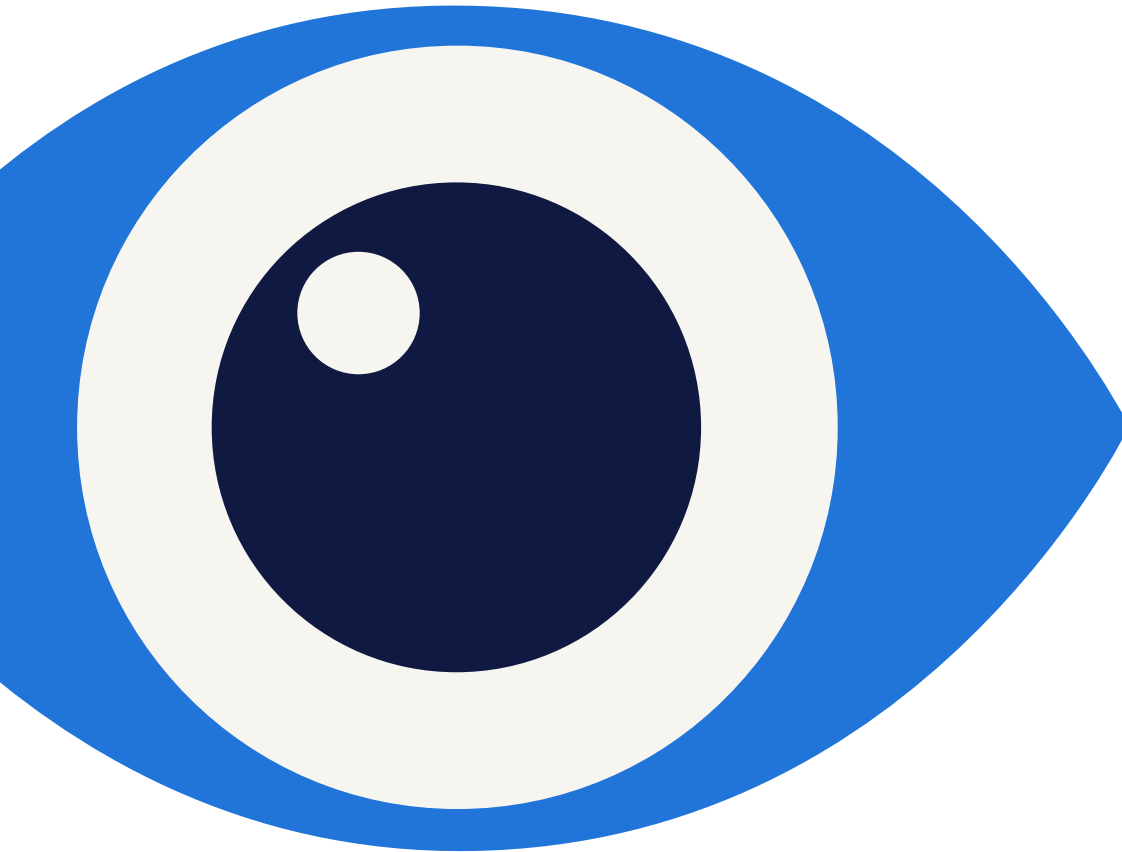
2017



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



# perception of employer offer in china and the region.



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

## employers in china are perceived to offer.

- 1 financially healthy
- 2 very good reputation
- 3 job security
- 4 career progression
- 5 uses latest technologies
- 6 attractive salary & benefits
- 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 china.

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 career progression
  - 3 work-life balance
- 



# what do potential employees want by generational profile.

gen z (18-24)

## 49%

of the gen z's finds pleasant work atmosphere a very important pull factor towards an employer. This is higher when compared to older workforce.

gen x (35-54)

## 46%

are attracted to financial healthy employers. Younger generations find this less attractive.

millennials (25-34)

## 28%

of the millennials find flexible arrangements a very important pull factor towards an employer. Among older generations, this factor is deemed less important.

boomers (55-64)

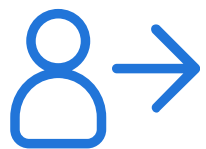
## 56%

of the boomers seek job security. Younger generations are less interested in this offering from their employer.



[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.



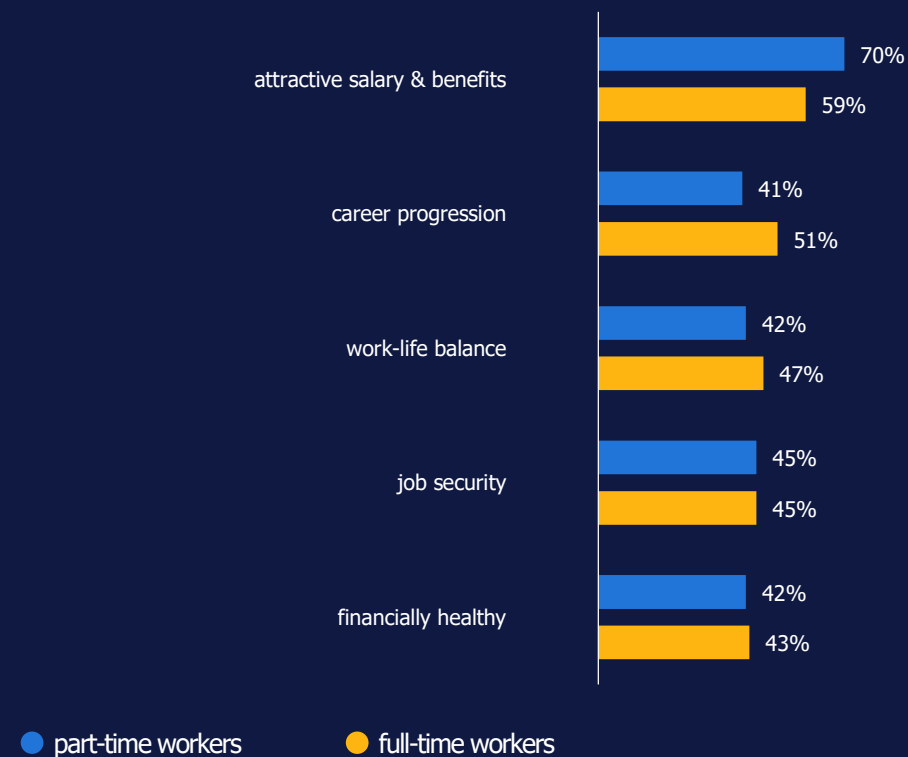
2%

of today's workforce  
works part-time.

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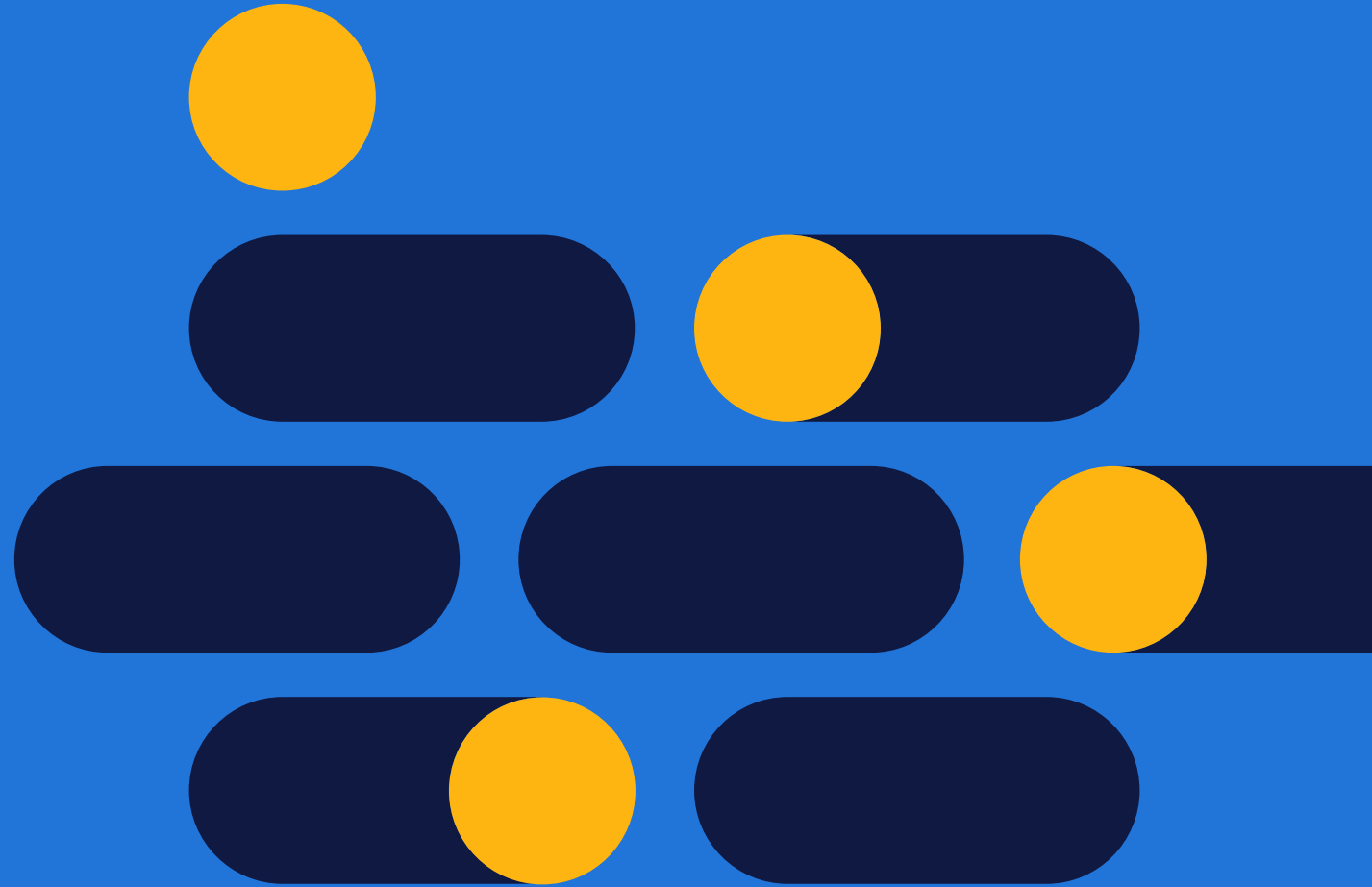
## most important attributes





# switchers and stayers

in focus.



# changing employer china vs apac.

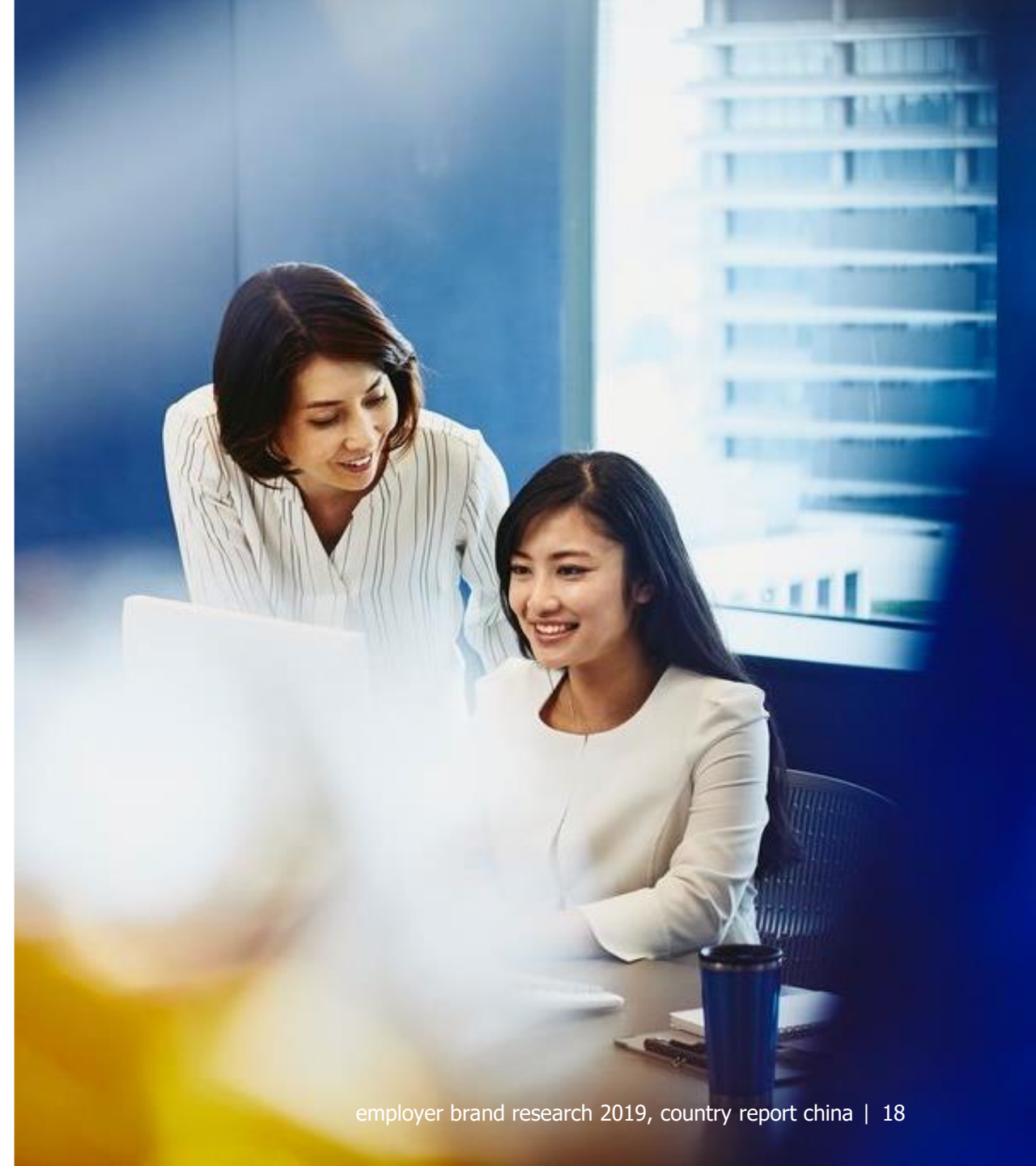
**switchers:** changed employer in the past year.



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

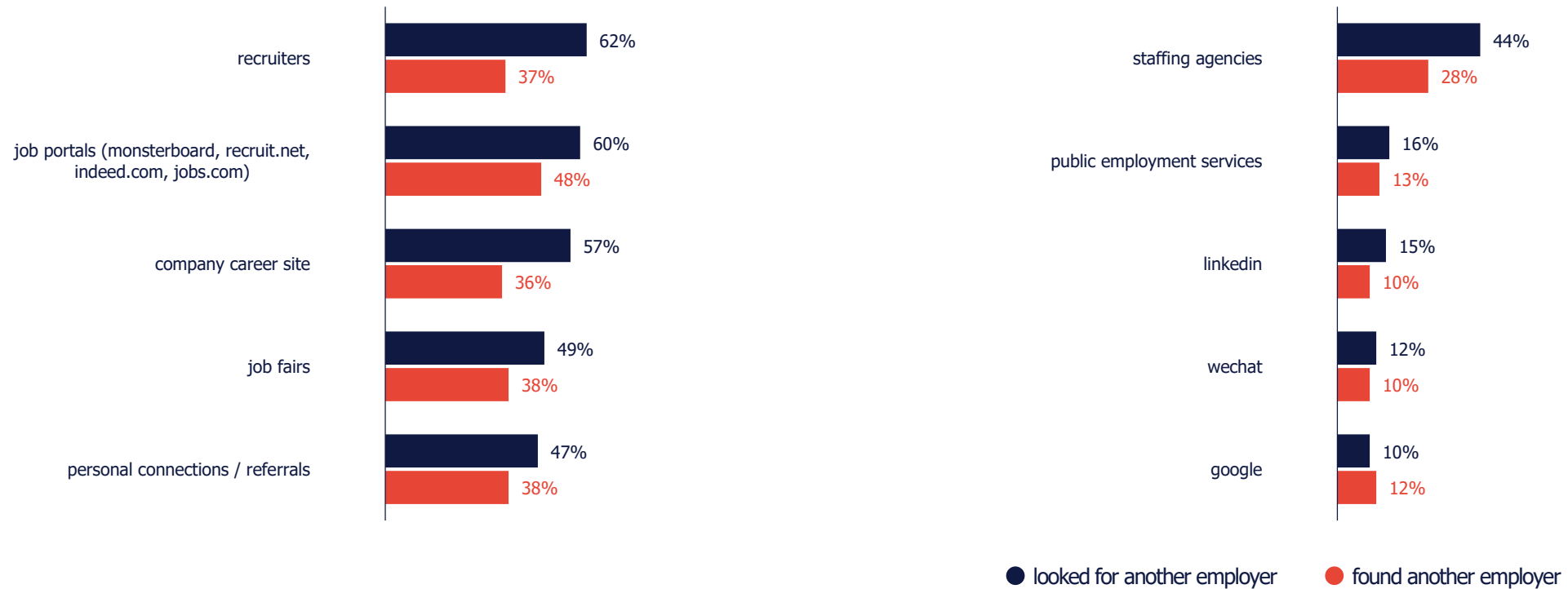


**intenders:** plan to change employer within the next year.

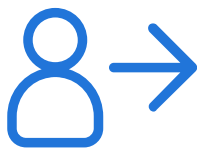


# how do the chinese workers look for and find employers.

## channels used to look for and find employers



# most important attributes switchers vs stayers.



16% (17%)\*

switchers: changed  
employer in  
the past year.



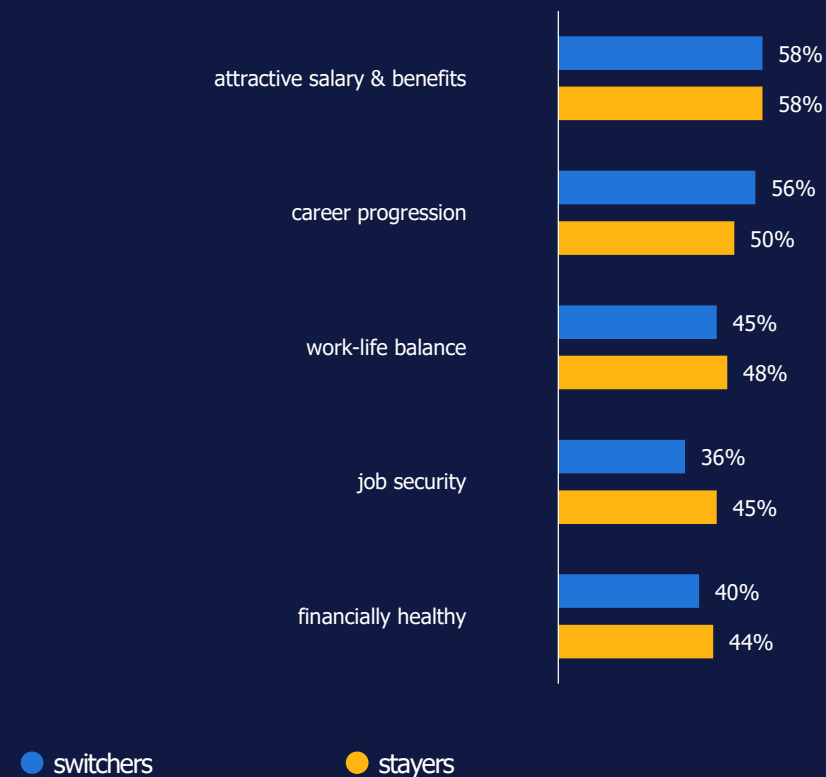
84% (83%)\*

stayers: stayed with their  
employer in the past year.

\*in 2018



## most important attributes



# most important attributes intenders.



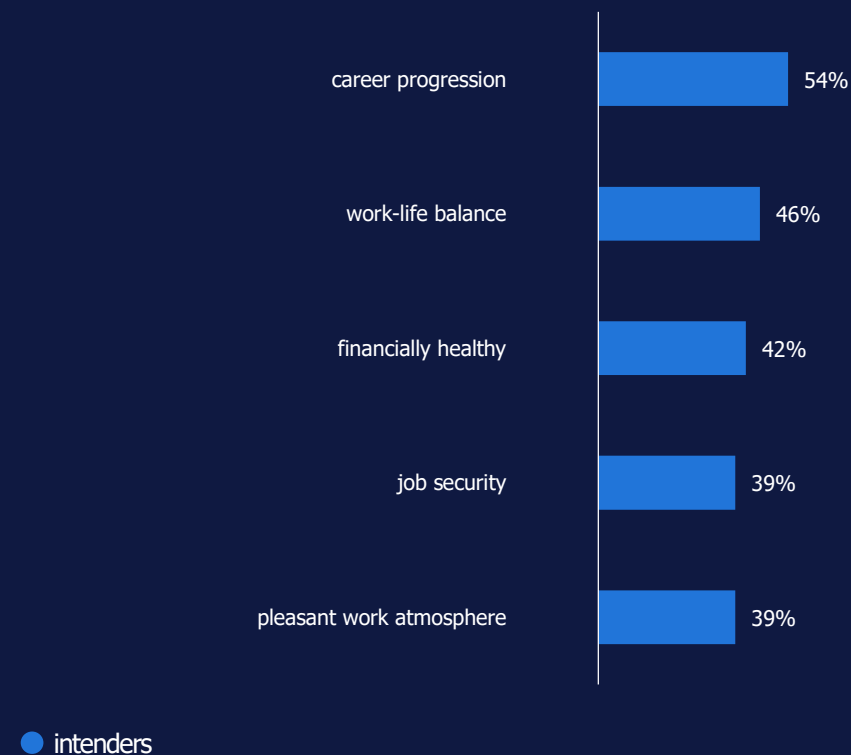
31% (29%)\*

intenders: plan to  
change employer  
within the next year.

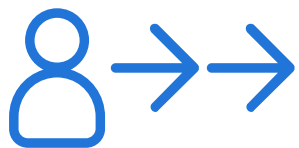
\*in 2018



## most important attributes



# channels to look for employers intenders.



**56%** (51%)\*

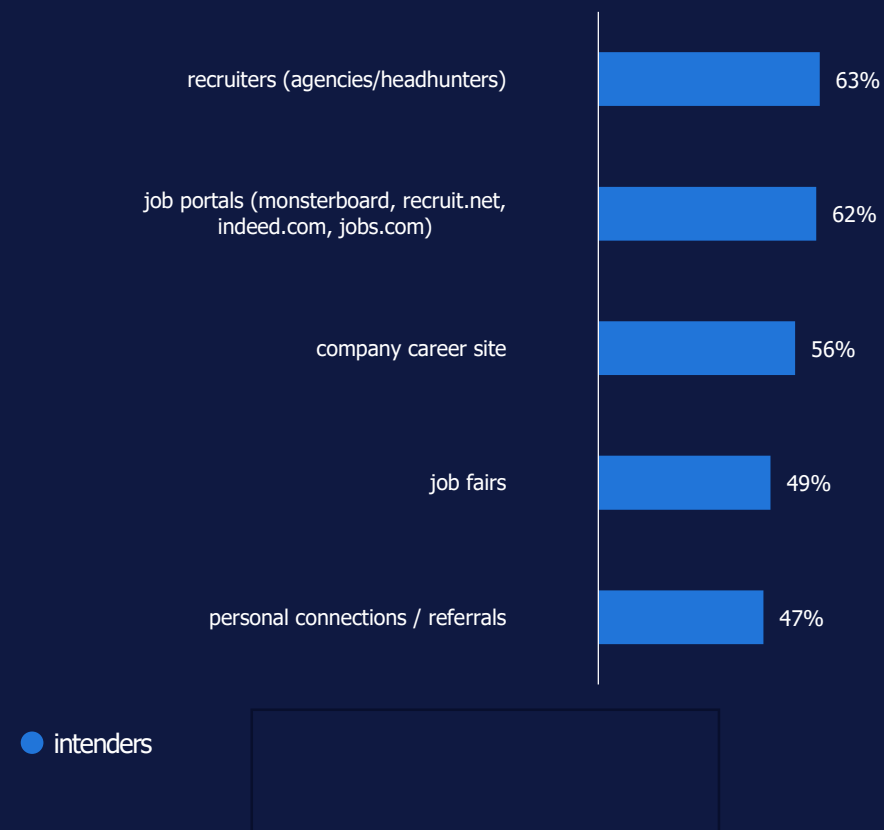
of last year's switchers\*\*  
intend to switch again  
next year.

\*\*n=548 switched last year

\*in 2018



## channels to look for employers

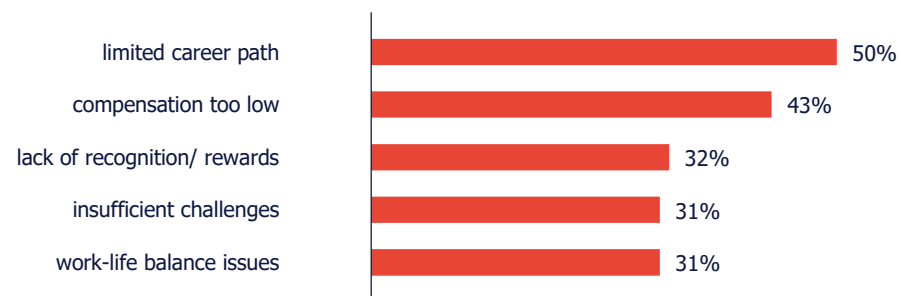


# why do the chinese stay or leave.

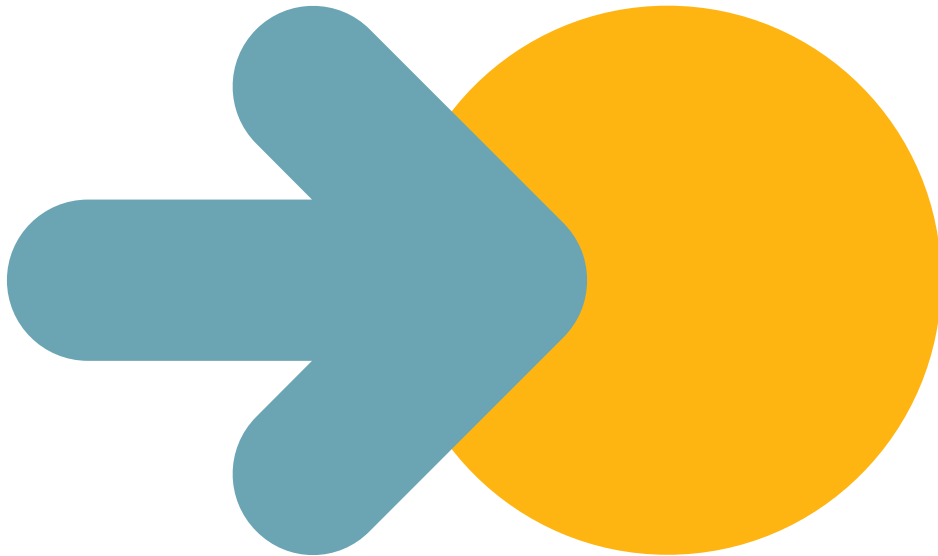
## main reasons to stay



## main reasons to leave



# what factors do the chinese stay for reasons to stay, by profile.



gen z (18-24)

28%

of the gen z's stay with their employer if they get good training. This is higher when compared to gen x and boomers.

gen x (35-54)

53%

of the gen x's stay with their employer for a good work-life balance. Among millennials, this factor is deemed less important.

millennials (25-34)

54%

of the millennials stay if they have career opportunities. Older generations are less interested in this offering from their employer.

boomers (55-64)

66%

of the boomers are more likely to stay with their employer for job security. This is higher when compared to gen z and millennials.

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



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

---

gen z (18-24)

42%

of the gen z's are leaving their employer if they don't get sufficient challenges at work. This is higher when compared to older workforce.

---

gen x (35-54)

33%

of the gen x's leave their employer if their organization is not financially stable. Among younger generations, this factor is deemed less important.

---

millennials (25-34)

54%

of the millennials leave if have a limited career path. Older generations are less interested in this offering from their employer.

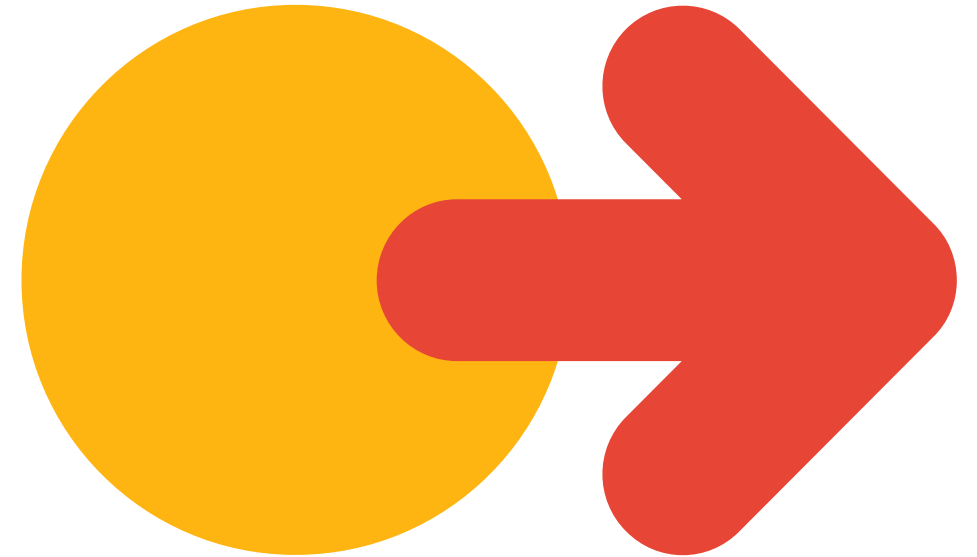
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boomers (55-64)

62%

of the boomers leaving their employer if their compensation is too low. This is higher when compared to younger generations.

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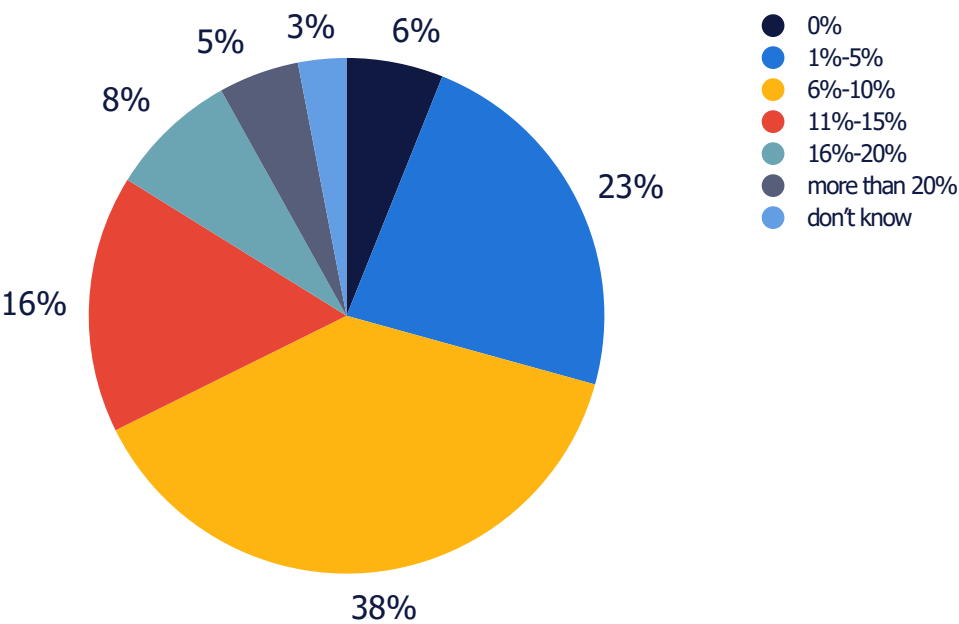


[click here](#) for a breakdown of all results.



# willingness to forfeit salary for more work security.

amount of salary employees are willing to forfeit



china

29%

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



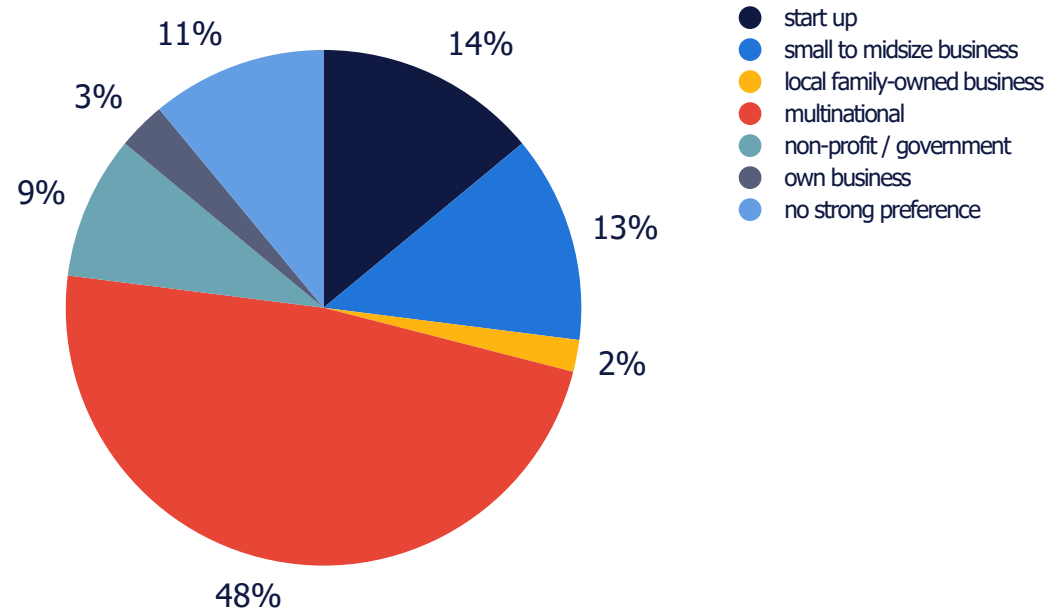
# ideal employer

in focus.



# 48% of the chinese prefer to work for large (multinational) corporation.

preferred company type



gen z (18-24)

44%

would prefer to work for a large (multinational) corporation

gen x (35-54)

46%

would prefer to work for a large (multinational) corporation

millennials (25-34)

18%

would prefer to work for a start-up

boomers (55-64)

28%

has no strong preference

# company type preference

## reasons why.

---

### multinational (48%)

career progression

job security

attractive salary and benefits

---

### non-profit (9%)

job security

work-life balance

financial health

---

---

### start-up (14%)

career progression

interesting job content

pleasant work atmosphere

---

### own business (3%)

career progression

work-life balance

pleasant work atmosphere

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### small to midsize (13%)

job security

pleasant work atmosphere

work-life balance

---

### local family-owned (2%)

job security

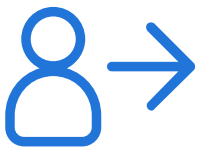
work-life balance

pleasant work atmosphere

---



# company type preference switchers vs stayers.



53%

of the switchers prefer to work for a large (multinational) corporation.

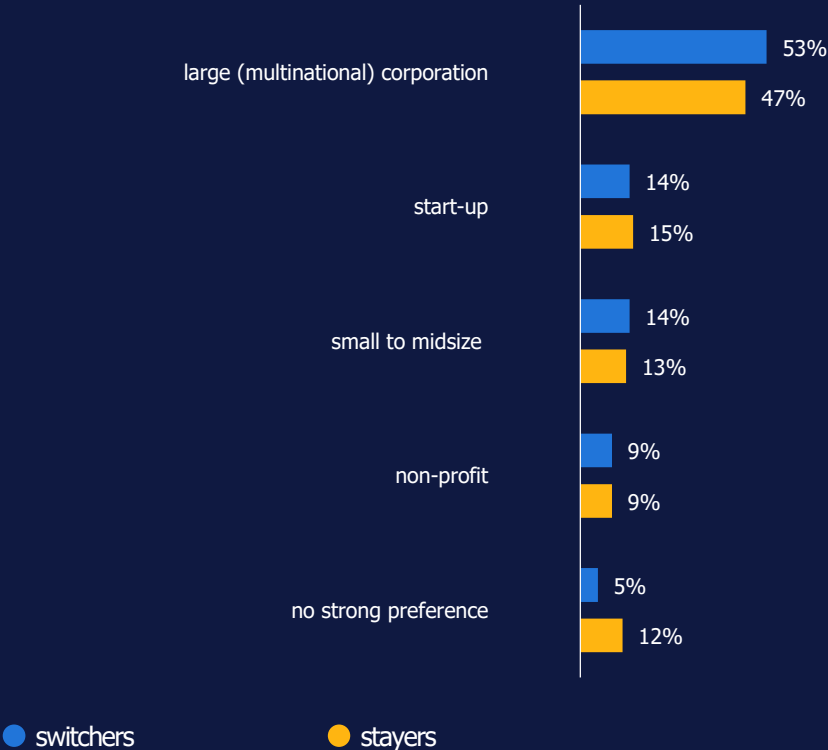


47%

of the stayers prefer to work for a large (multinational) corporation.

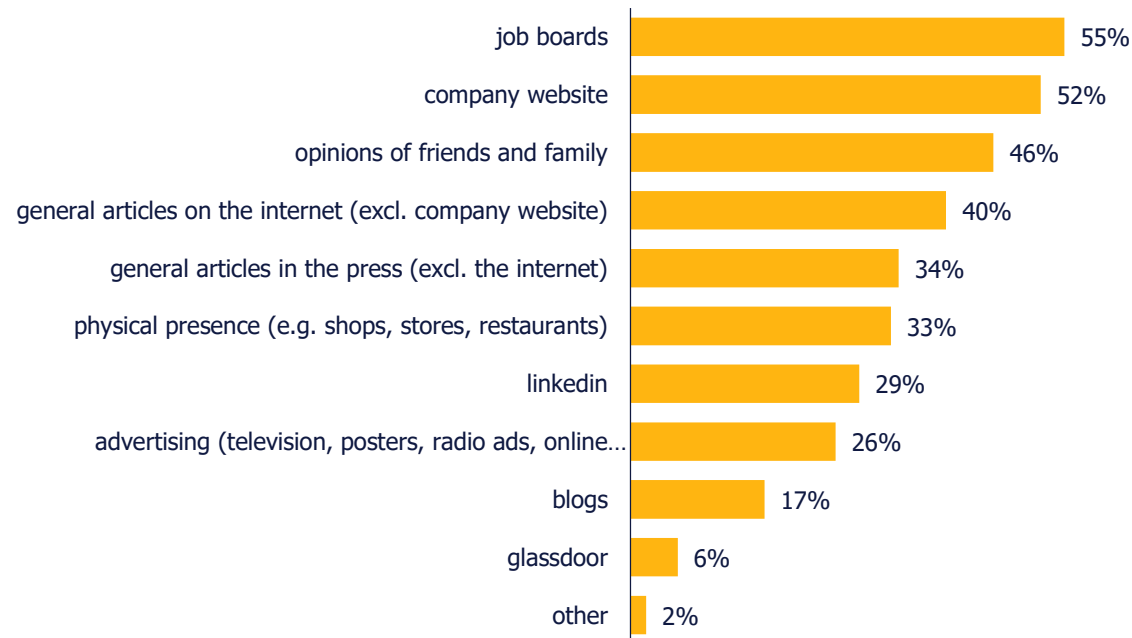


## company type preference



# 98% of the chinese check potential employer's reputation.

## channels for reputation check



## most often used

gen z (18-24)

57%

job boards

gen x (35-54)

26%

linkedin

millennials (25-34)

59%

company website

boomers (55-64)

51%

opinions of friends and family

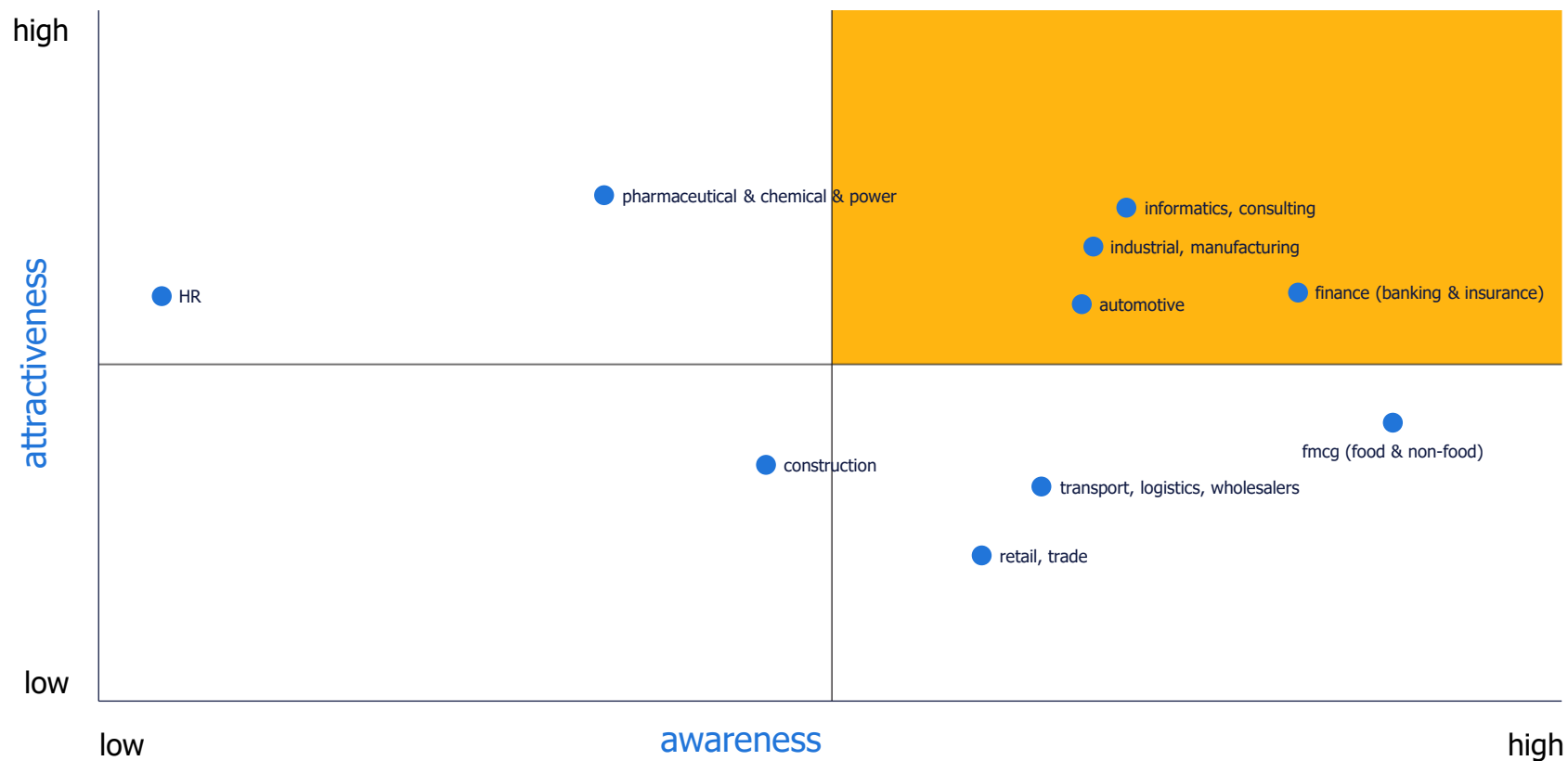
sector



insights.



# top performing sectors in china 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.



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

sector	top 3 EVP drivers		
	1	2	3
01 pharmaceutical & chemical & power	financially healthy	uses latest technologies	job security
02 informatics, consulting	uses latest technologies	financially healthy	attractive salary & benefits
03 industrial, manufacturing	financially healthy	uses latest technologies	very good reputation
04 finance (banking & insurance)	financially healthy	job security	gives back to society
05 HR	attractive salary & benefits	career progression	financially healthy
06 automotive	uses latest technologies	financially healthy	job security
07 fmcg (food & non-food)	financially healthy	very good reputation	job security
08 construction	financially healthy	attractive salary & benefits	career progression
09 transport, logistics, wholesalers	financially healthy	very good reputation	gives back to society
10 retail, trade	financially healthy	gives back to society	very good reputation

top



employers.

# top employers in china.

## top 10 employers 2019

---

- 01 华为公司(HUAWEI)
  - 02 阿里巴巴集团 (ALIBABA GROUP)
  - 03 腾讯公司 (TENCENT)
  - 04 西门子 ( SIEMENS)
  - 05 国际商业机器公司 ( INTERNATIONAL BUSINESS MACHINES) 【IBM】
  - 06 英特尔公司 ( INTEL)
  - 07 埃森哲 (ACCENTURE)
  - 08 瑞士ABB集团 (ABB)
  - 09 博世公司 (ROBERT BOSCH)
  - 10 法国威立雅环境集团(VEOLIA ENVIRONNEMENT)
- 

## top 10 employers 2018

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- 01 阿里巴巴集团 (ALIBABA GROUP)
  - 02 腾讯公司 (TENCENT)
  - 03 英特尔公司 ( INTEL)
  - 04 华为公司(HUAWEI)
  - 05 法国威立雅环境集团(VEOLIA ENVIRONNEMENT)
  - 06 西门子 ( SIEMENS)
  - 07 瑞士ABB集团 (ABB)
  - 08 国际商业机器公司 ( INTERNATIONAL BUSINESS MACHINES) 【IBM】
  - 09 埃森哲 (ACCENTURE)
  - 10 拜耳集团 ( BAYER)
-

# china's top companies

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

	top 3 EVP drivers		
top 5 companies	1	2	3
1 华为公司(HUAWEI)	uses latest technologies	financially healthy	attractive salary & benefits
2 阿里巴巴集团 (ALIBABA GROUP)	financially healthy	uses latest technologies	career progression
3 腾讯公司 (TENCENT)	financially healthy	uses latest technologies	attractive salary & benefits
4 西门子 (SIEMENS)	uses latest technologies	financially healthy	very good reputation
5 国际商业机器公司 (INTERNATIONAL BUSINESS MACHINES) 【IBM】	very good reputation	uses latest technologies	attractive salary & benefits

# top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	华为公司(HUAWEI)	英特尔公司 ( INTEL)	腾讯公司 (TENCENT)
career progression	华为公司(HUAWEI)	阿里巴巴集团 (ALIBABA GROUP)	腾讯公司 (TENCENT)
financially healthy	华为公司(HUAWEI)	阿里巴巴集团 (ALIBABA GROUP)	腾讯公司 (TENCENT)
gives back to society	法国威立雅环境集团(VEOLIA ENVIRONNEMENT)	阿里巴巴集团 (ALIBABA GROUP)	华为公司(HUAWEI)
interesting job content	腾讯公司 (TENCENT)	阿里巴巴集团 (ALIBABA GROUP)	埃森哲 (ACCENTURE)
job security	巴斯夫公司 (BASF)	法国威立雅环境集团(VEOLIA ENVIRONNEMENT)	阿里巴巴集团 (ALIBABA GROUP)
pleasant work atmosphere	阿里巴巴集团 (ALIBABA GROUP)	腾讯公司 (TENCENT)	法国威立雅环境集团(VEOLIA ENVIRONNEMENT)
uses latest technologies	华为公司(HUAWEI)	阿里巴巴集团 (ALIBABA GROUP)	腾讯公司 (TENCENT)
very good reputation	华为公司(HUAWEI)	阿里巴巴集团 (ALIBABA GROUP)	英特尔公司 ( INTEL)
work-life balance	法国威立雅环境集团(VEOLIA ENVIRONNEMENT)	德国大陆集团(CONTINENTAL)	瑞士ABB集团 (ABB)

deep dive

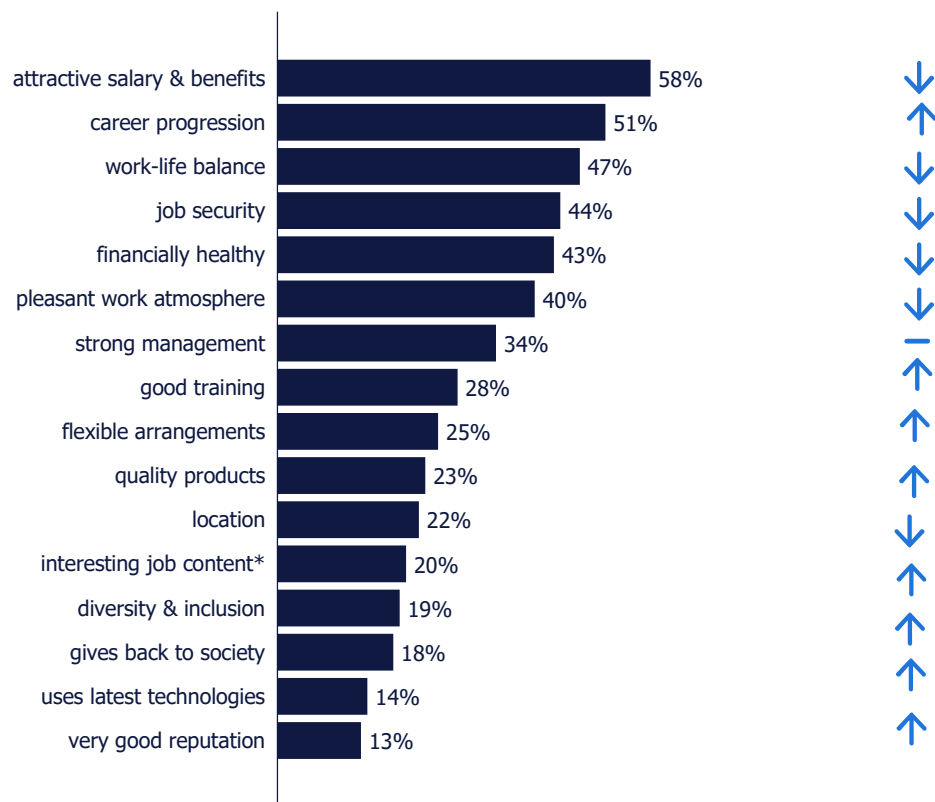
appendix 1.



# what potential employees want

## the most important criteria when choosing an employer.

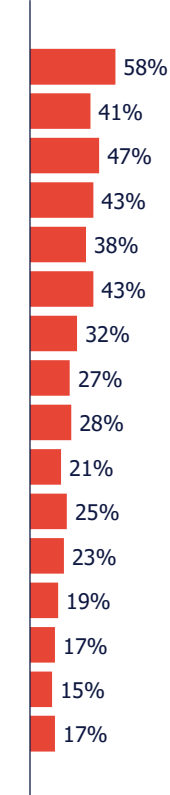
### important criteria



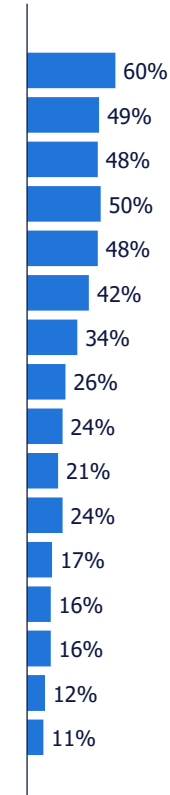
### versus 2018



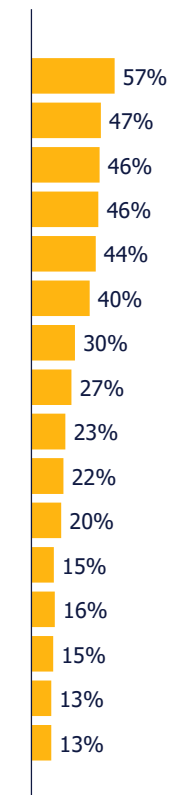
### apac



### 2018



### 2017



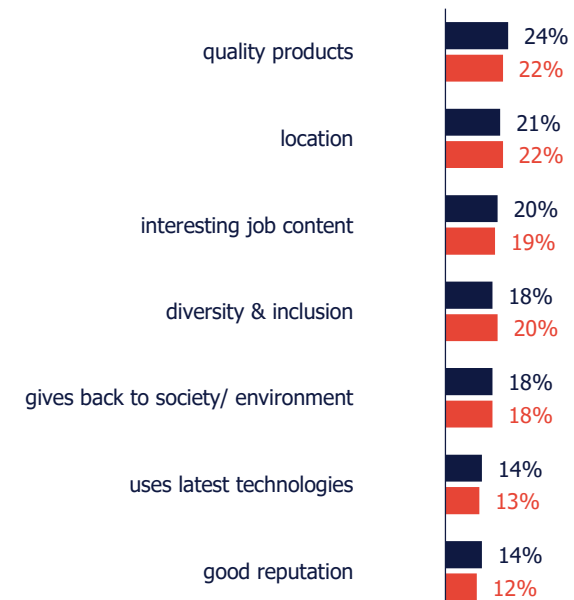
Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.

\*2017: work that is stimulating and challenging





# EVP driver importance by gender.

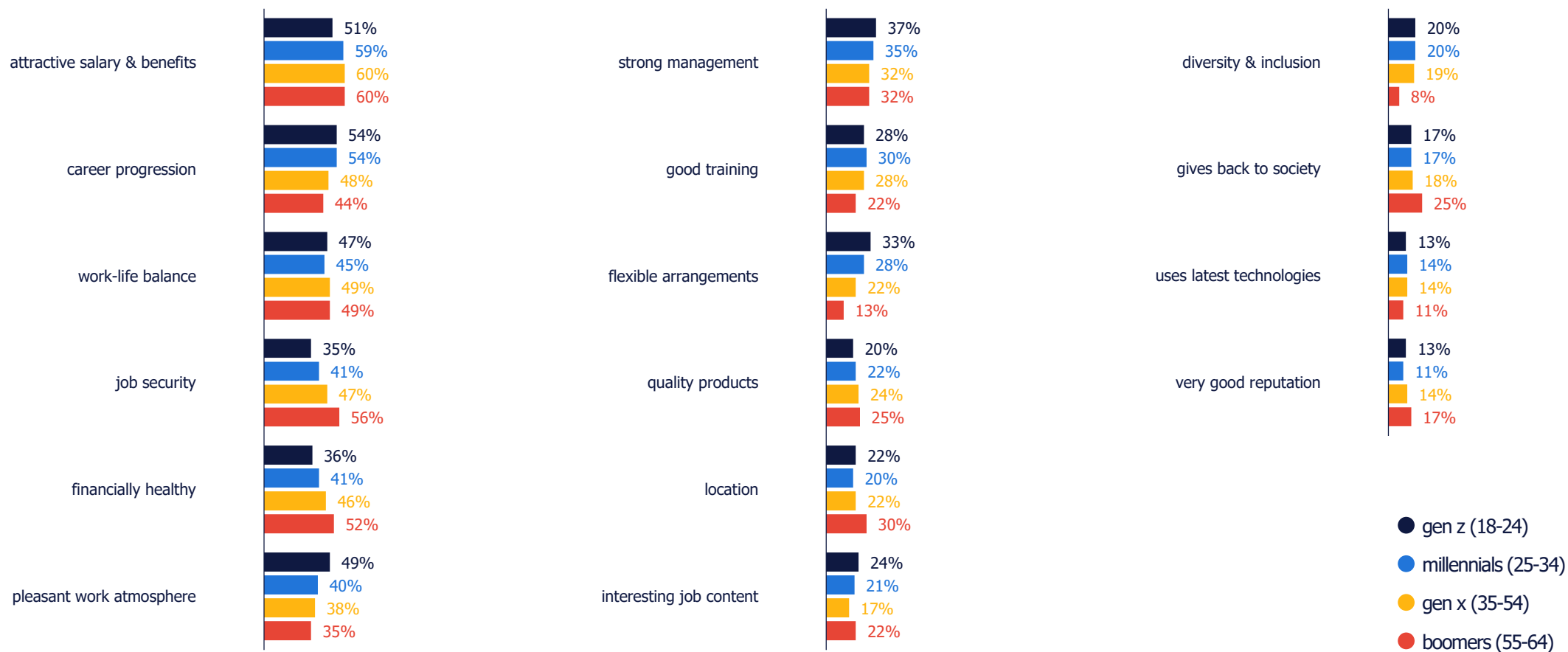


● male  
● female

# EVP driver importance by education.



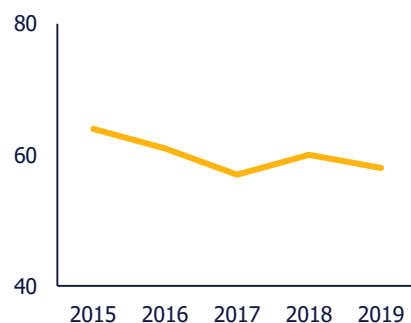
# EVP driver importance by age.



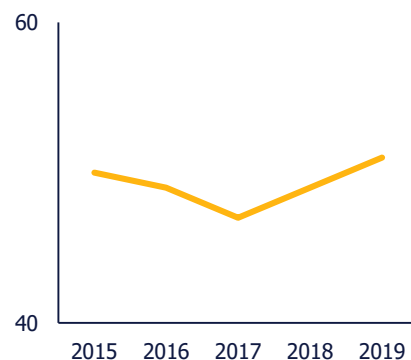
# EVP driver importance trends, total.

1/2

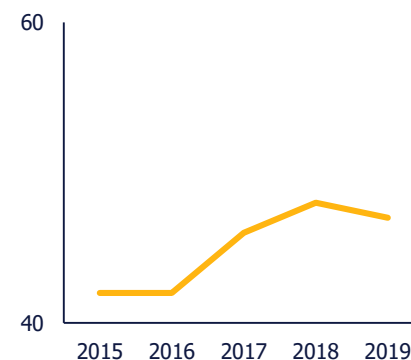
attractive salary & benefits



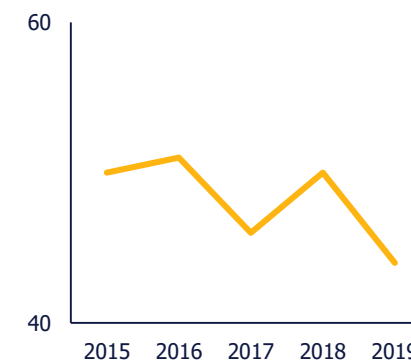
career progression



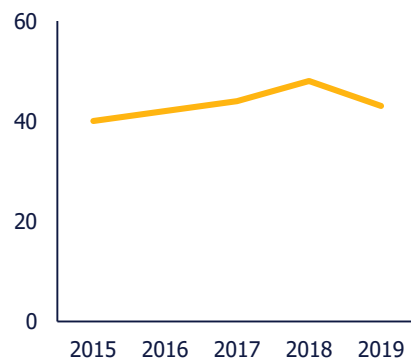
work-life balance



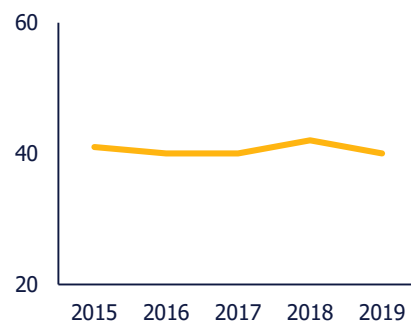
job security



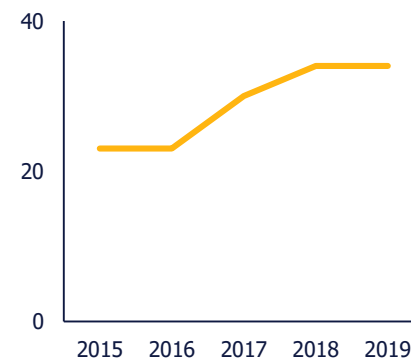
financially healthy



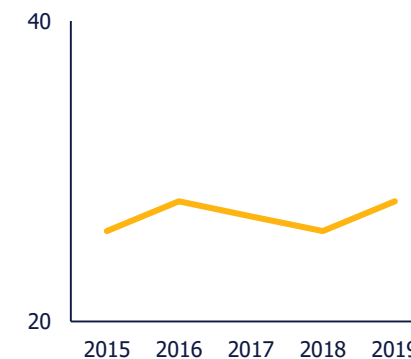
pleasant work atmosphere



strong management



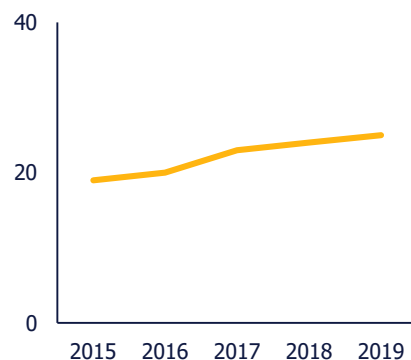
good training



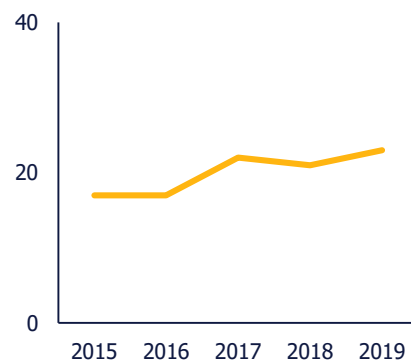
# EVP driver importance trends, total.

2/2

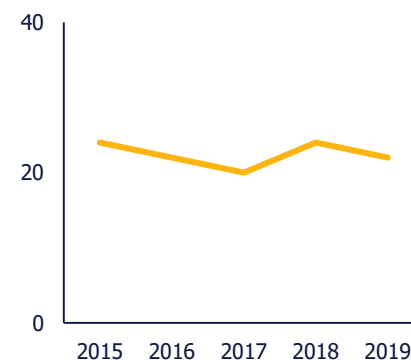
flexible arrangements



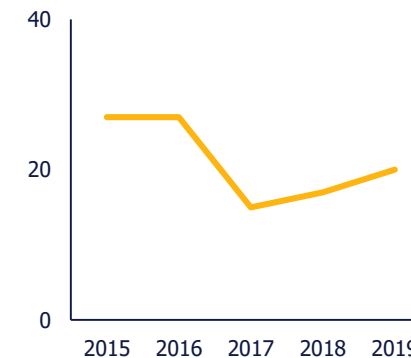
quality products



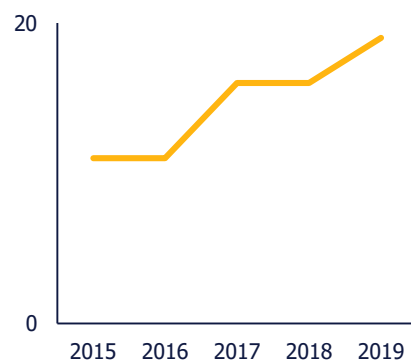
location



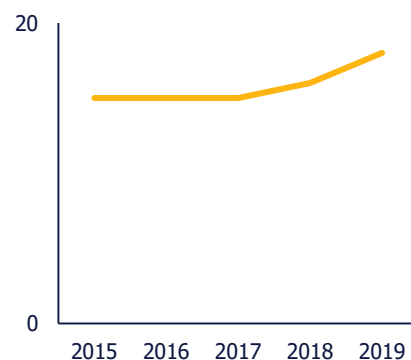
interesting job content\*



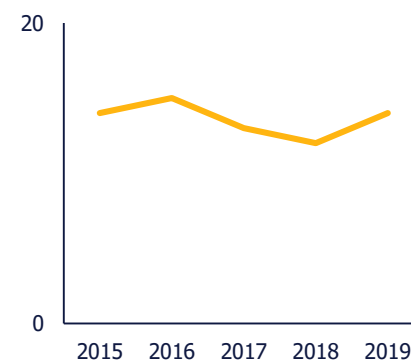
diversity & inclusion



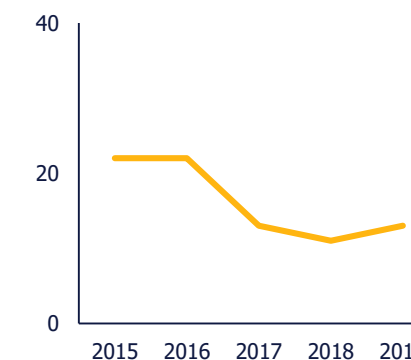
gives back to society



uses latest technologies



very good reputation\*\*

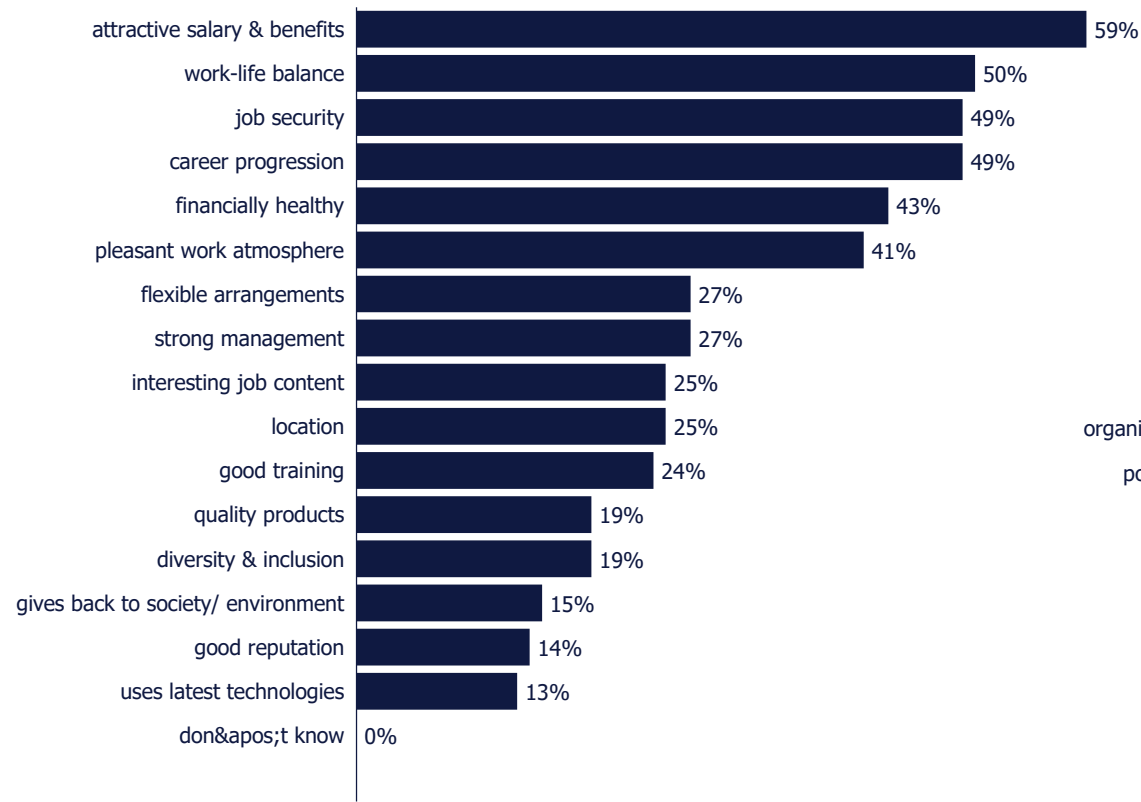


\*2017: work that is stimulating and challenging  
\*\*previous to 2017: strong image/strong values

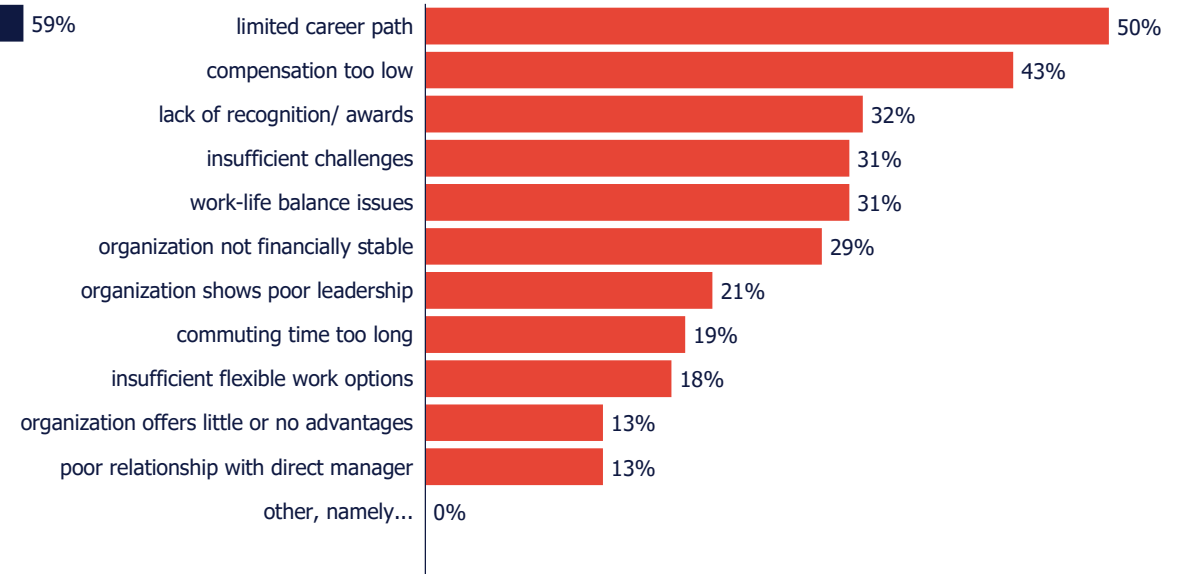


# what factors do the chinese stay or leave for.

## 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.

