

employer brand research 2019



country report
germany.

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.¹

50%

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

96%

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

80%

of workforce leaders agree that a strong employer brand has a significant impact on their ability to hire great workforce.² 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%.⁸

62%

of candidates research companies on social media before applying.⁵



Companies with bad reputations pay 10% more per hire.⁴

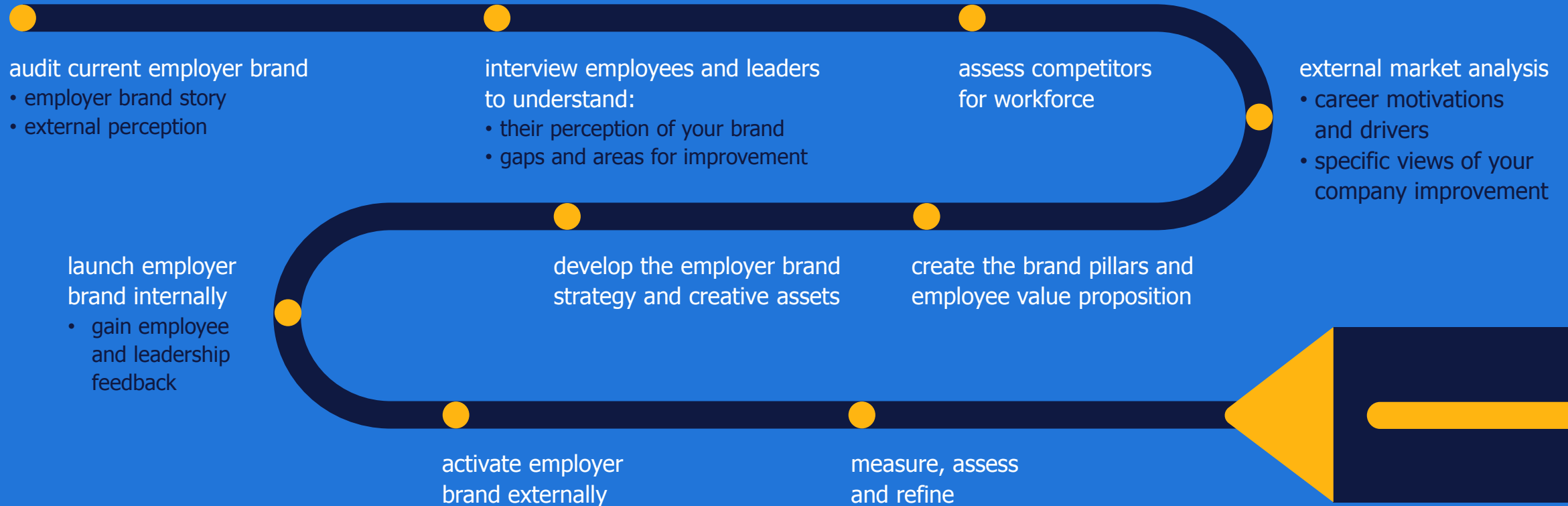
67%

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.⁶

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.⁷

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

- 6,312 respondents

fieldwork

- online interviews
- between 3 december 2018 and 11 january 2019

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.



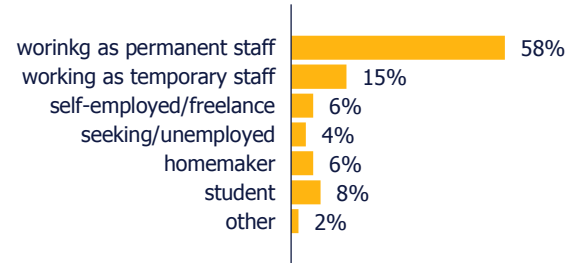
sample composition in germany

socio-demographics, employment situation, region.

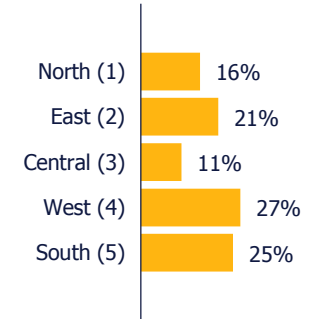
gender



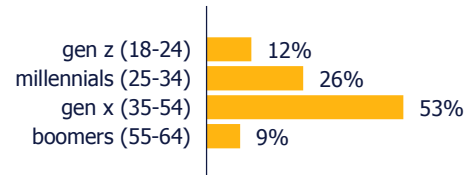
situation



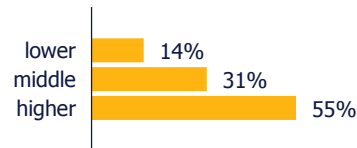
region



age



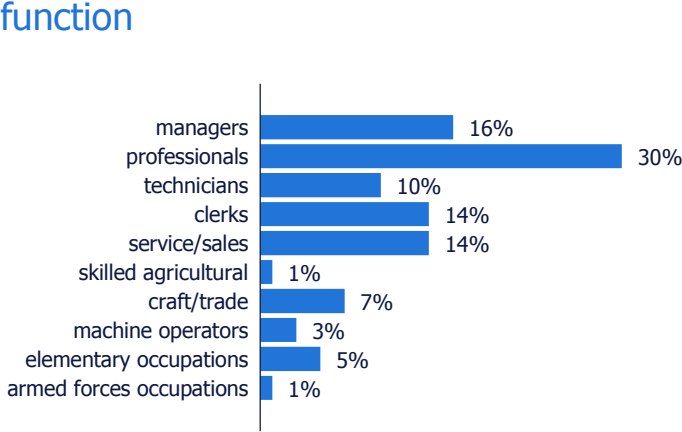
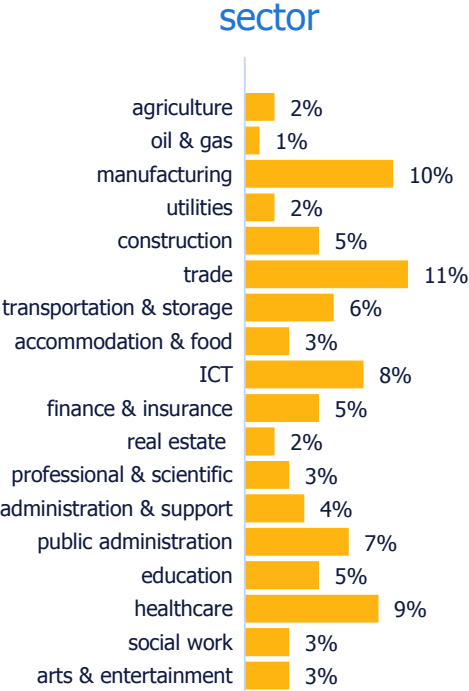
education



1. Bremen, Hamburg, Niedersachsen, Schleswig-Holstein
2. Berlin, Brandenburg, Mecklenburg-Vorpommern, Sachsen, Sachsen-Anhalt
3. Hessen, Thüringen
4. Nordrhein-Westfalen, Rheinland-Pfalz, Saarland
5. Baden-Württemberg, Bayern

total sample: 6,312
fieldwork: between 3 december 2018 and 11 january 2019

sample composition in germany

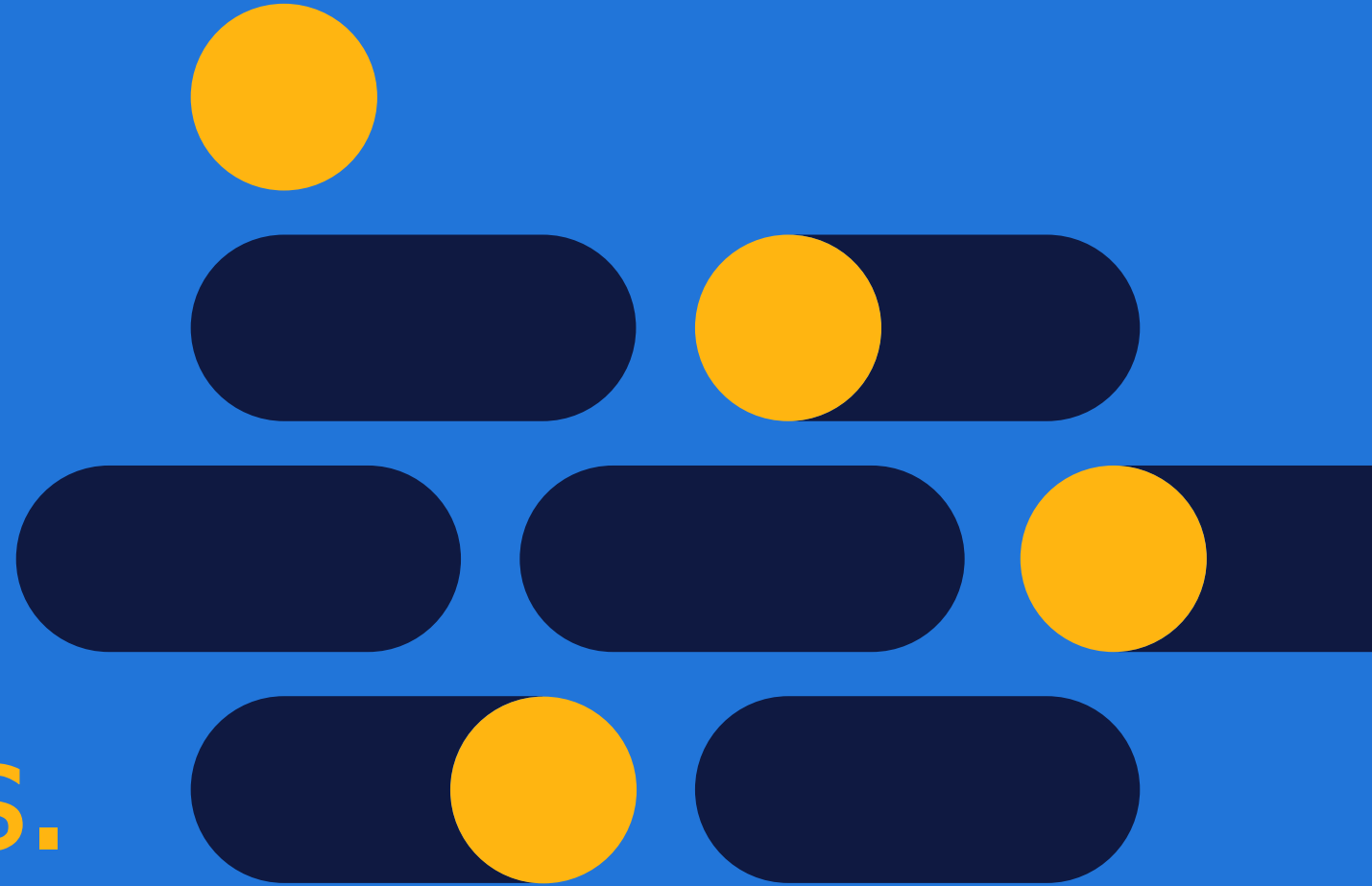


base: currently employed (n=5,045)



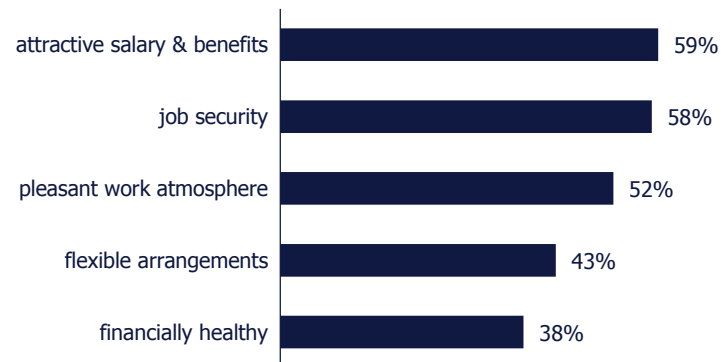
country

EVP drivers.



what potential employees want when choosing an employer.

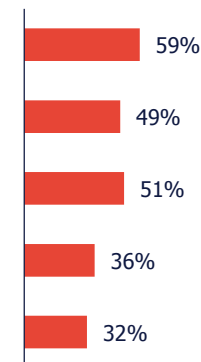
most important criteria



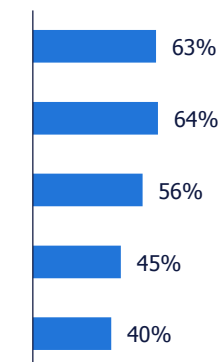
versus 2018



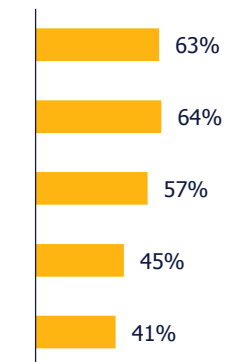
europe



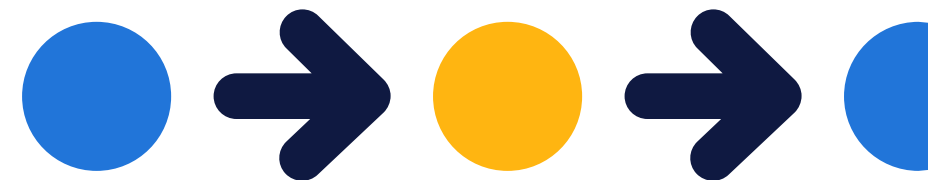
2018



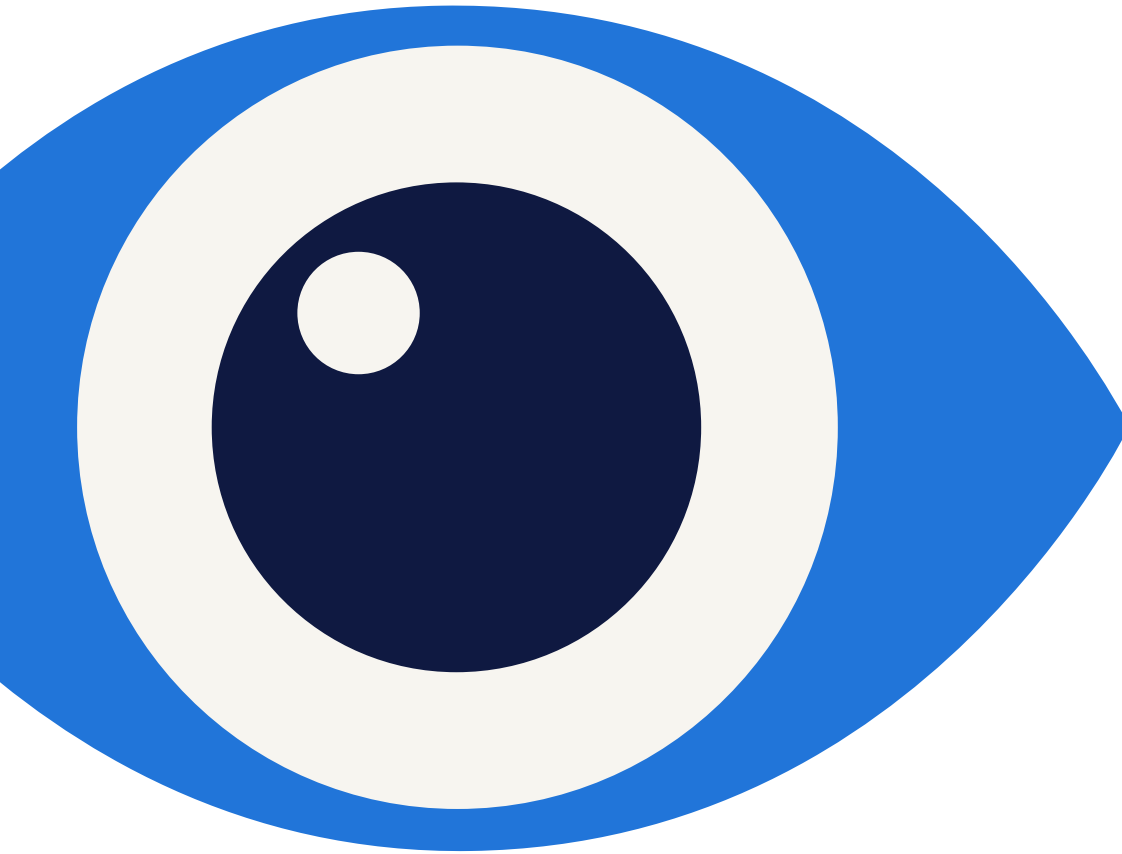
2017



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



perception of employer offer in germany and the region.



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

employers in germany are perceived to offer.

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

employers in europe are perceived to offer.

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

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

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)

24%

of the gen z's are looking for a company that gives back to society. This is higher when compared to older workforce.

gen x (35-54)

61%

of the gen x's find attractive salary & benefits a very important pull factor towards an employer. Among younger generations, this factor is deemed less important.

millennials (25-34)

42%

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

boomers (55-64)

66%

of the boomers find job security a very important attribute. This is less so among the younger cohorts.



[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.

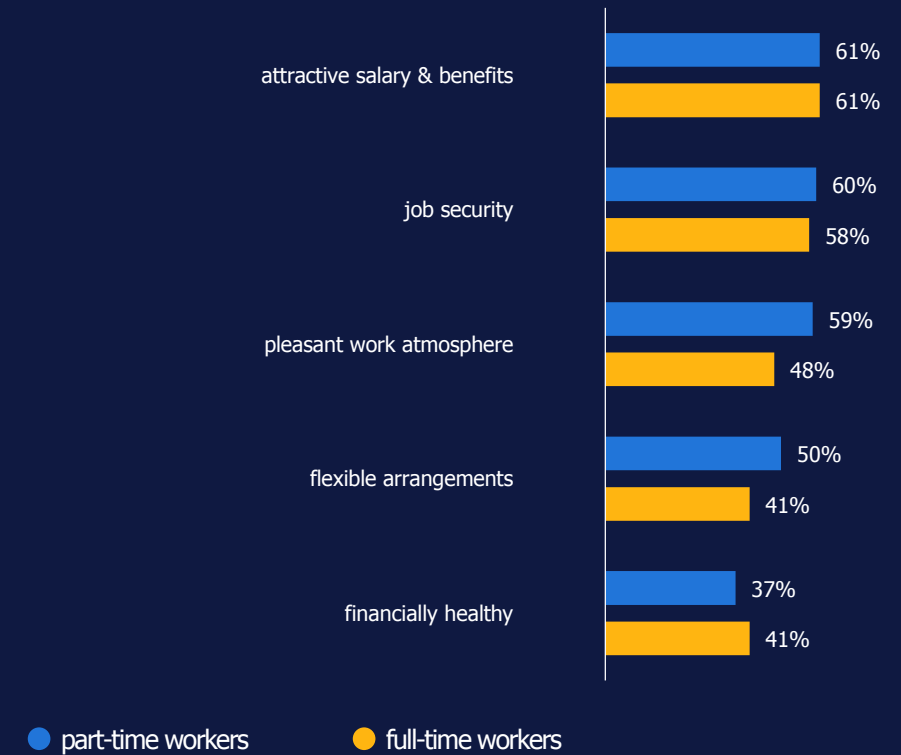


20%

of today's workforce
works part-time.

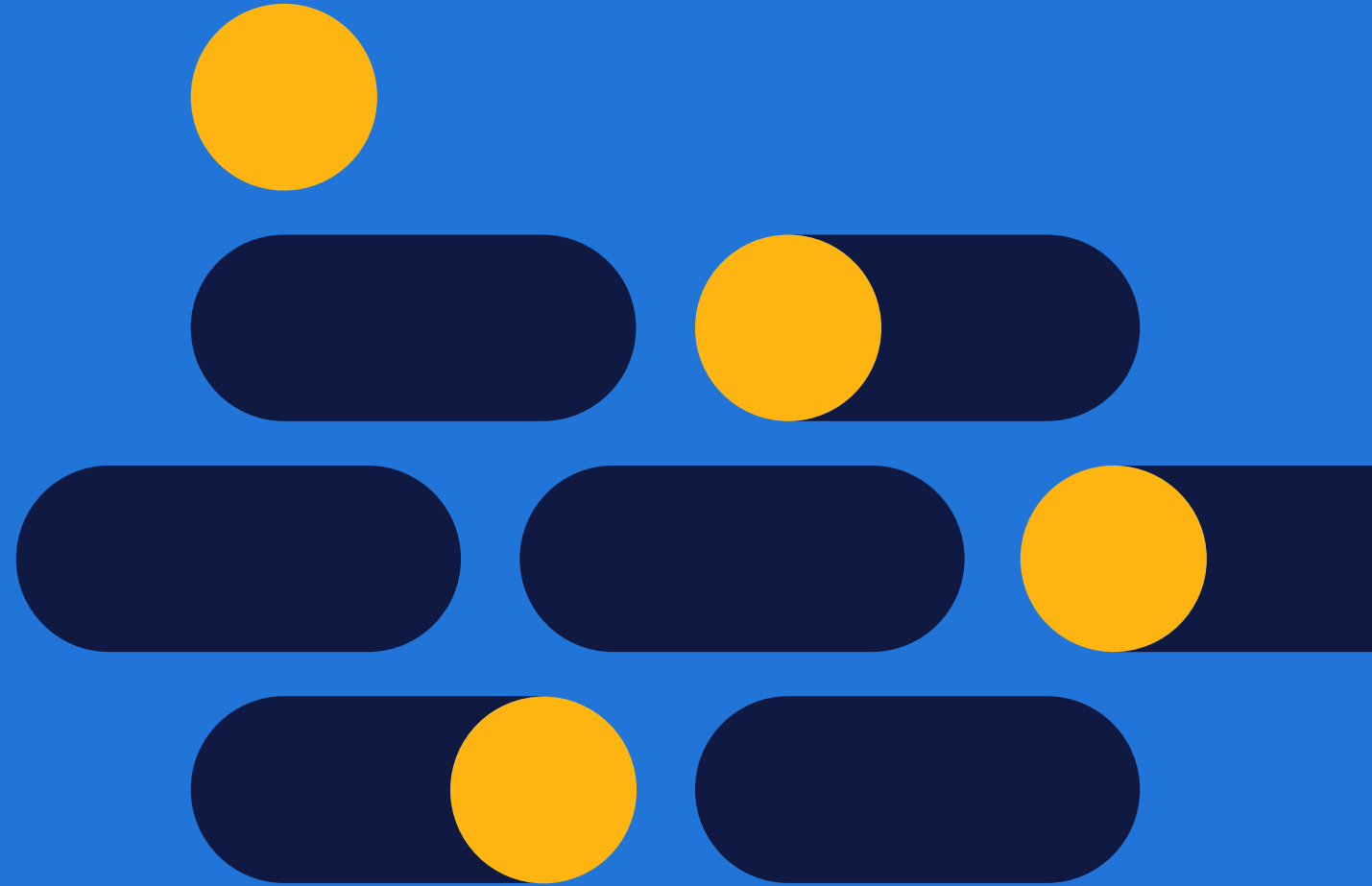


most important attributes



switchers and stayers

in focus.



changing employer germany vs europe.

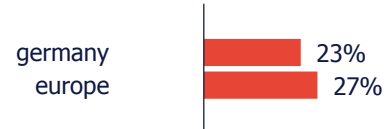
switchers: changed employer in the past year.



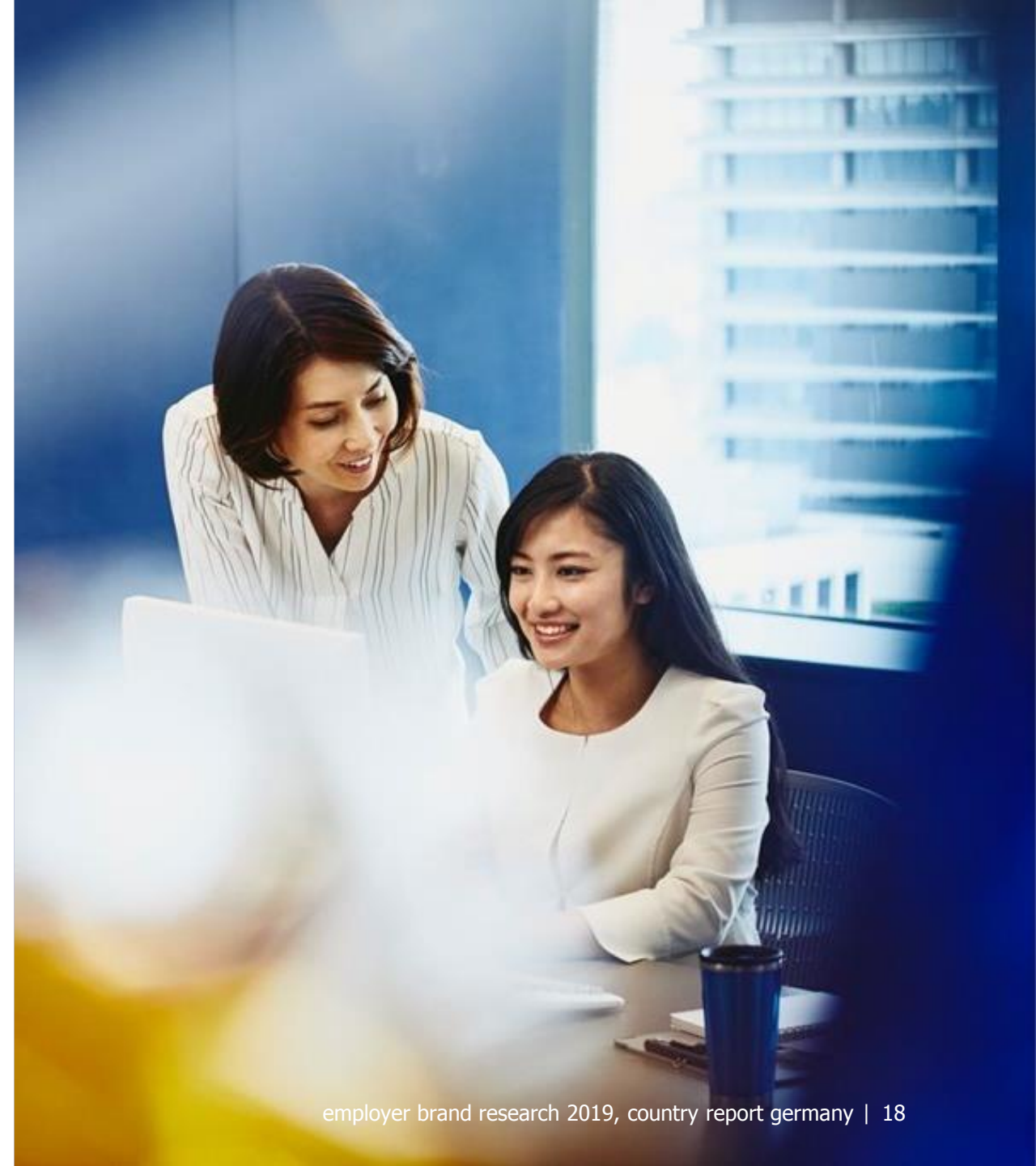
stayers: stayed with their employer in the past year.



intenders: plan to change employer within the next year.

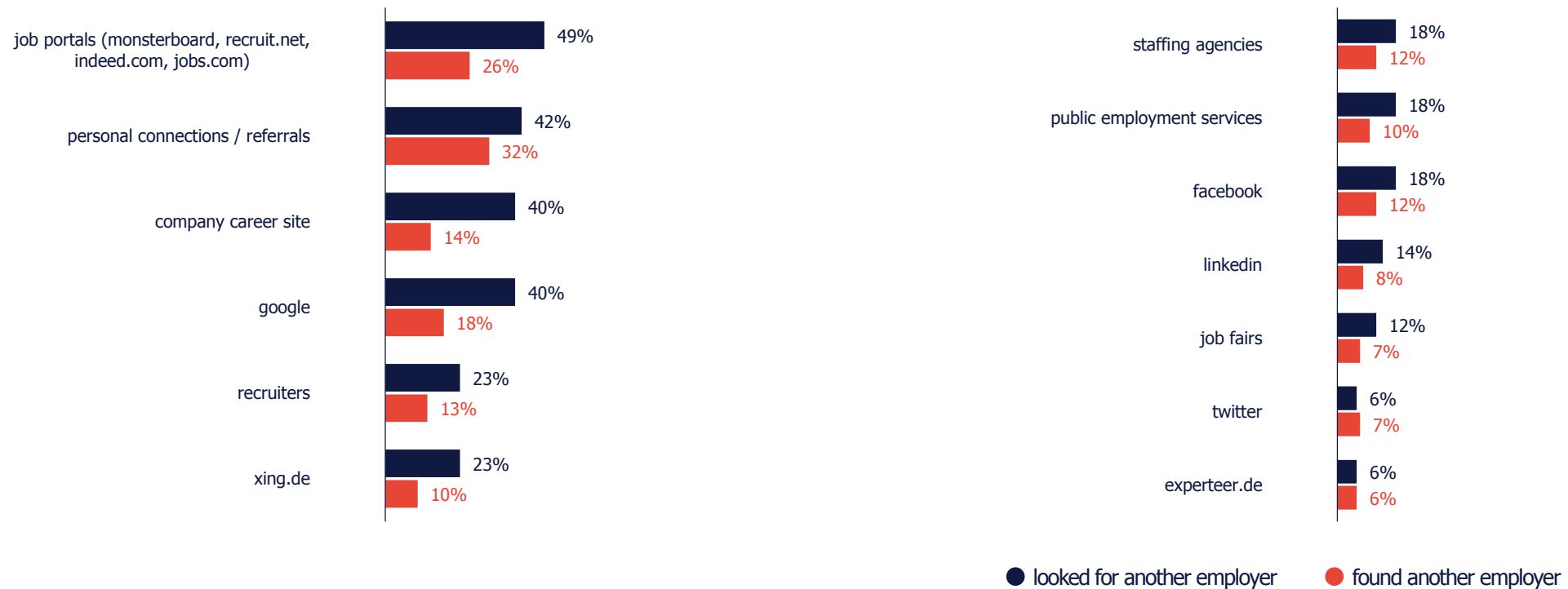


* in the past 12 months

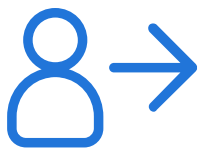


how do the german workers look for and find employers.

channels used to look for and find employers



most important attributes switchers vs stayers.



18% (16%)*

switchers: changed
employer in
the past year.



82% (84%)*

stayers: stayed with their
employer in the past year.

*in 2018



most important attributes



● switchers

● stayers

most important attributes intenders.



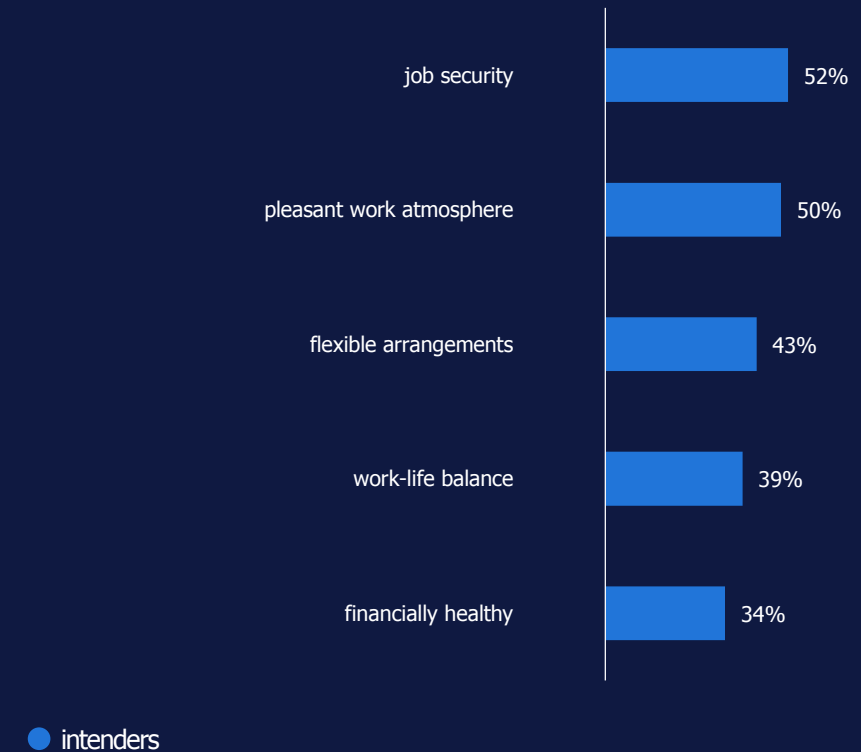
23% (23)*

intenders: plan to
change employer
within the next year.

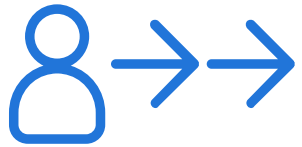
*in 2018



most important attributes



channels to look for employers intenders.



49% (48%)*

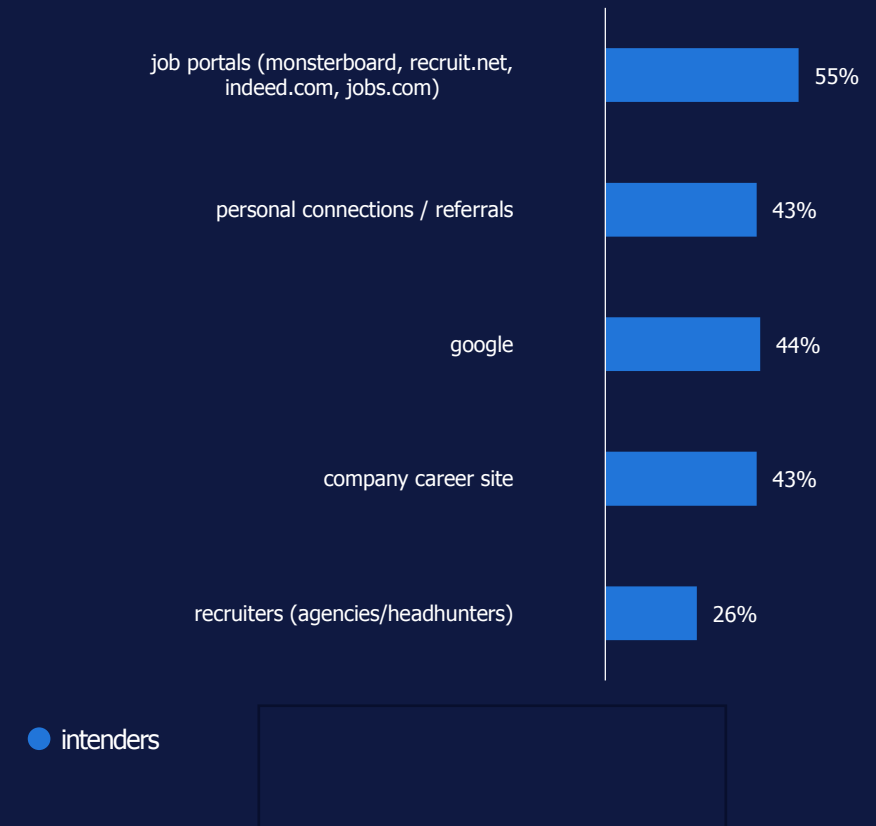
of last year's switchers**
intend to switch again
next year.

**n=1,123 switched last year

*in 2018



channels to look for employers

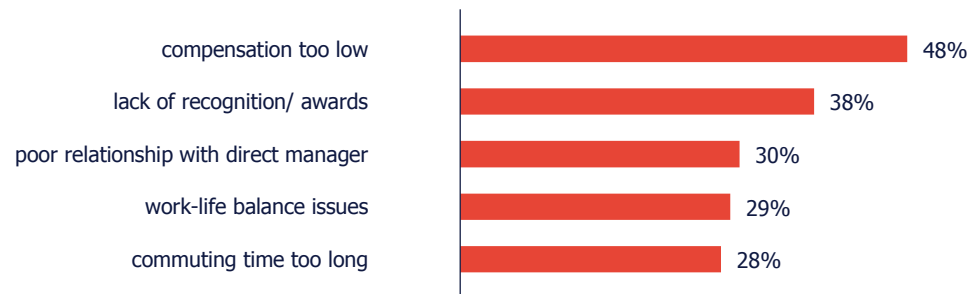


why do germans stay or leave.

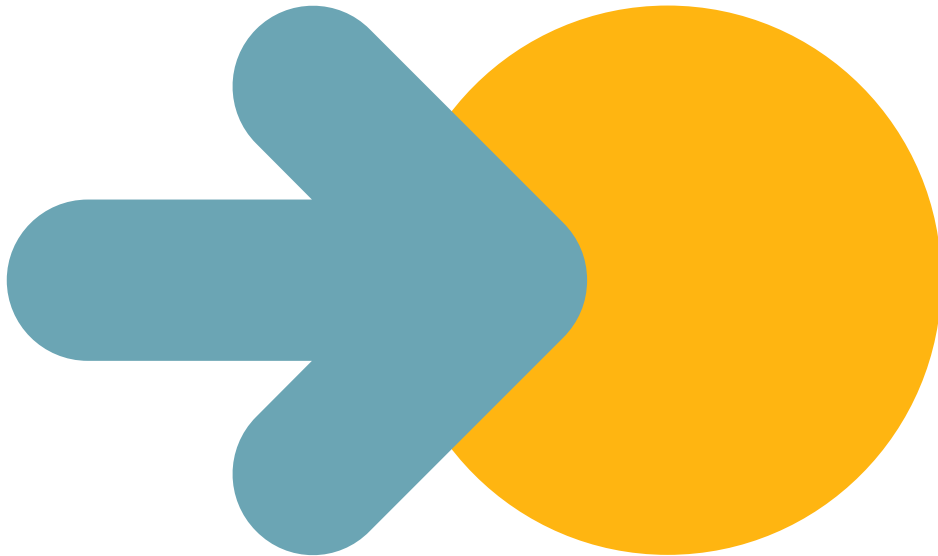
main reasons to stay



main reasons to leave



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



gen z (18-24)

26%

of the gen z's are staying with their employer if they have a very good reputation. This is higher when compared to older workforce.

gen x (35-54)

53%

of the gen x's stay with their employer for attractive salary & benefits. Among younger generations, this factor is deemed less important.

millennials (25-34)

31%

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

boomers (55-64)

59%

of the boomers are more likely to stay with their employer if they have a sense of job security. This is less so among gen z and millennials.

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

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

gen z (18-24)

34%

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

gen x (35-54)

33%

of the gen x's leave their employer if they have a poor relationship with their manager. Among younger generations, this factor is deemed less important.

millennials (25-34)

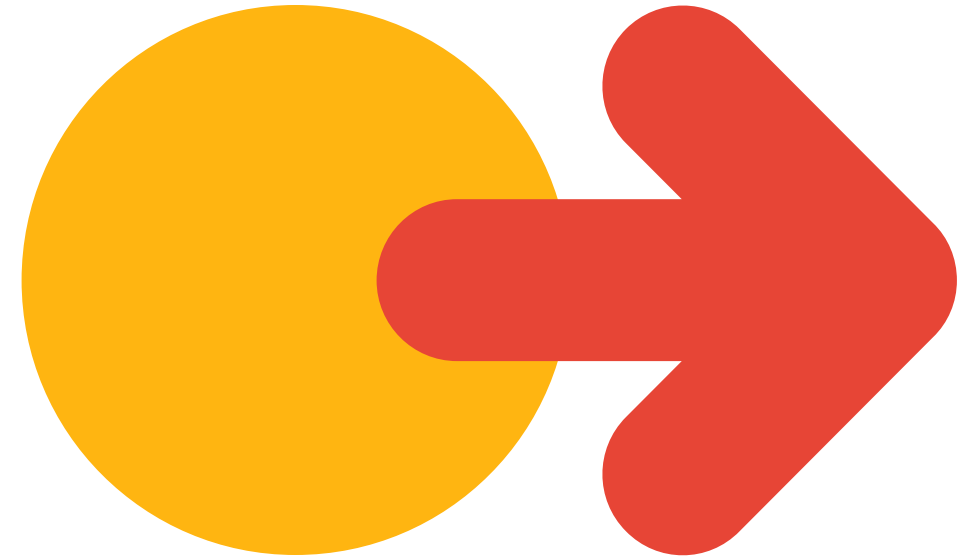
32%

of the millennials leave if they have work-life balance issues. This is higher when compared to older generations.

boomers (55-64)

55%

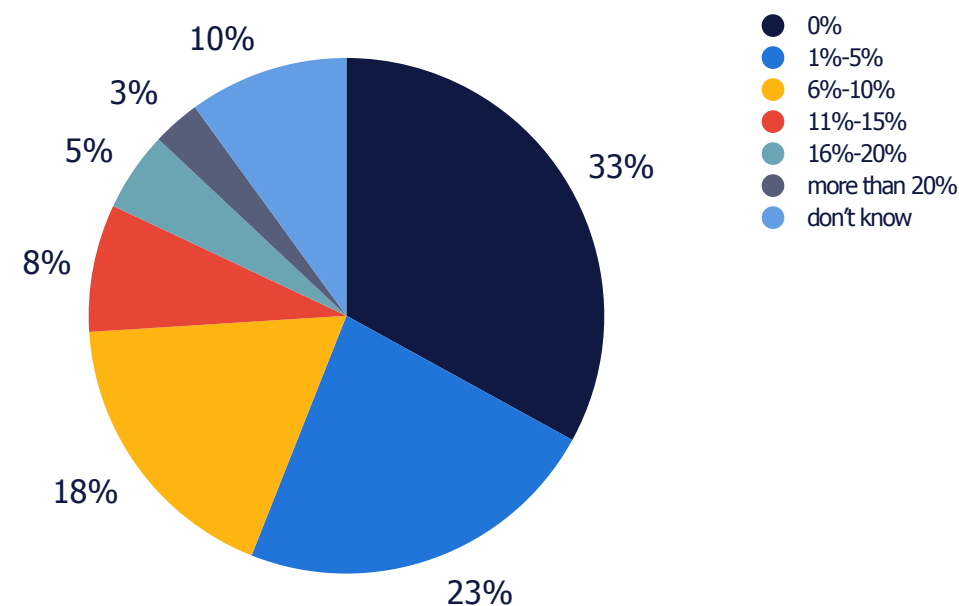
of the boomers are more likely to leave their current employer if their compensation is too low. This is less so among younger cohorts.



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

willingness to forfeit salary for more work security.

amount of salary employees are willing to forfeit



germany

16%

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

europe

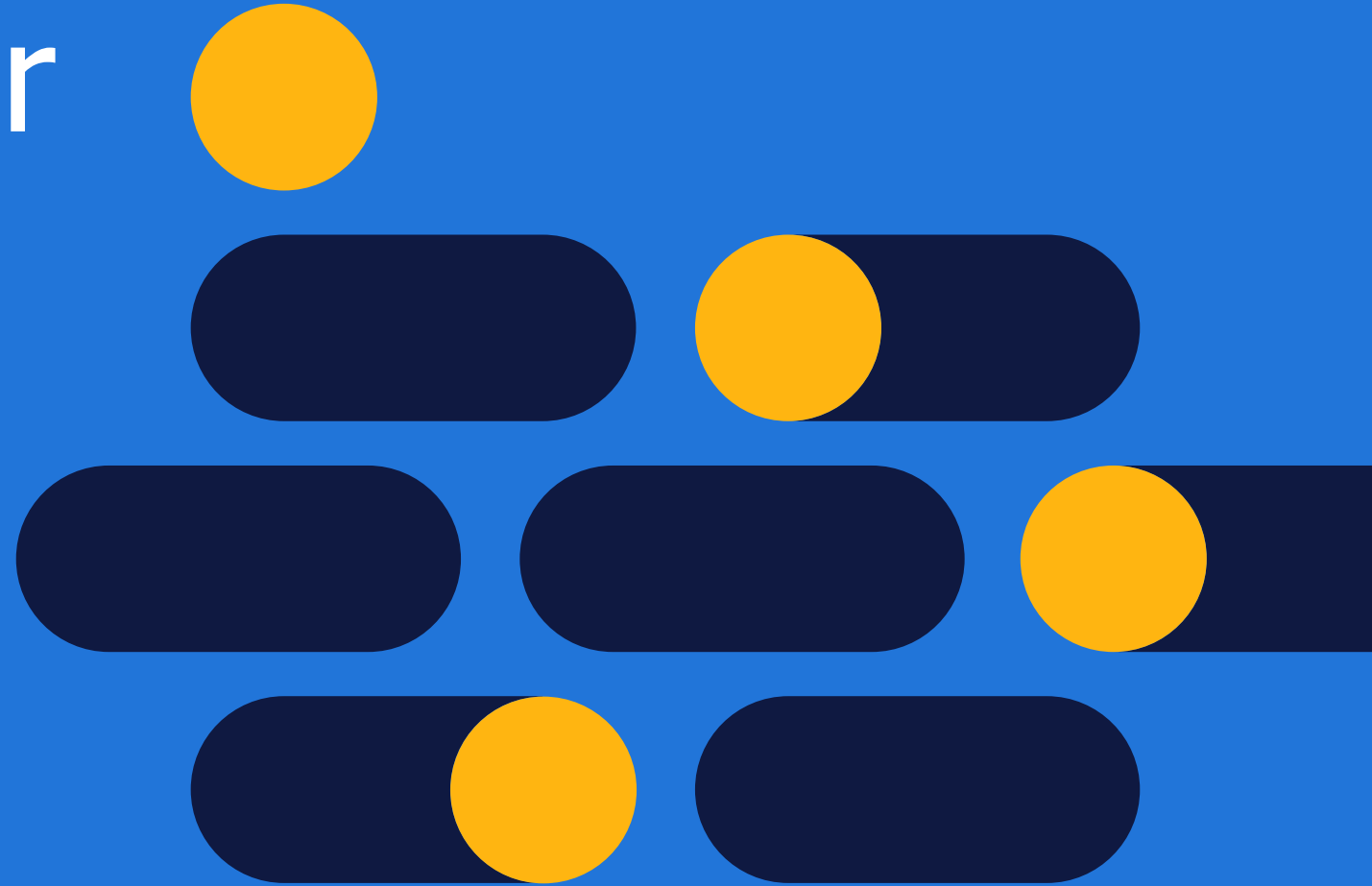
16%

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



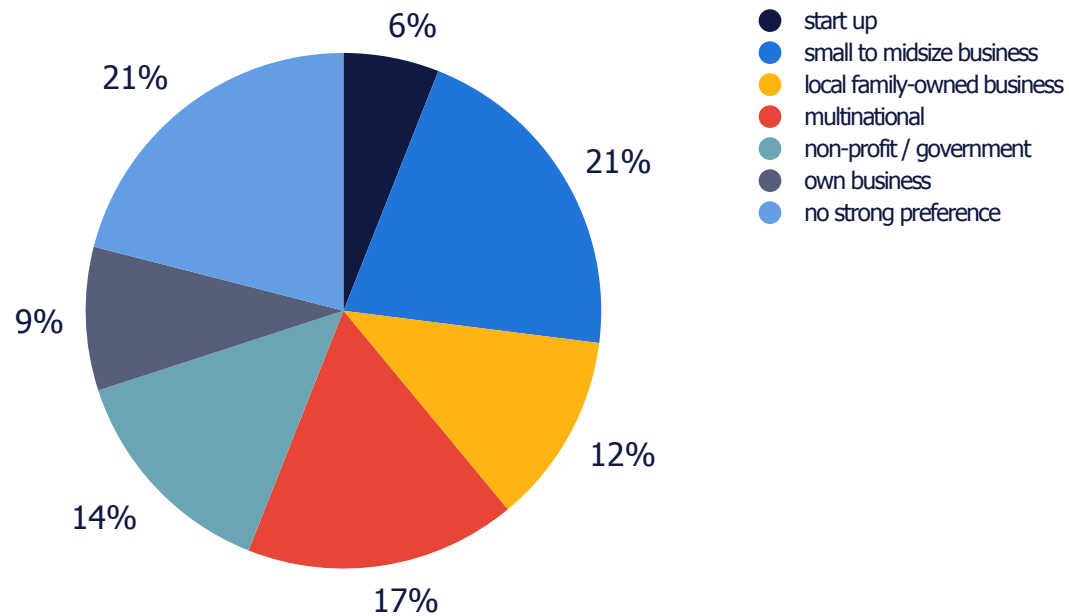
ideal employer

in focus.



21% of the germans prefer to work for small to midsize business.

preferred company type



gen z (18-24)

21%

would prefer to work for a large (multination) corporation

gen x (35-54)

23%

have no strong preference

millennials (25-34)

20%

would prefer to work for a small to midsize business

boomers (55-64)

29%

have no strong preference

company type preference

reasons why.

small to midsize (21%)

pleasant work atmosphere

job security

work-life balance

local family-owned (12%)

pleasant work atmosphere

job security

work-life balance

multinational (17%)

financial health

job security

career progression

own business (9%)

pleasant work atmosphere

work-life balance

interesting job content

non-profit / government (14%)

job security

financial health

work-life balance

start-up (6%)

pleasant work atmosphere

interesting job content

career progression



company type preference switchers vs stayers.



20%

of the switchers prefer to work for a small to midsize business.

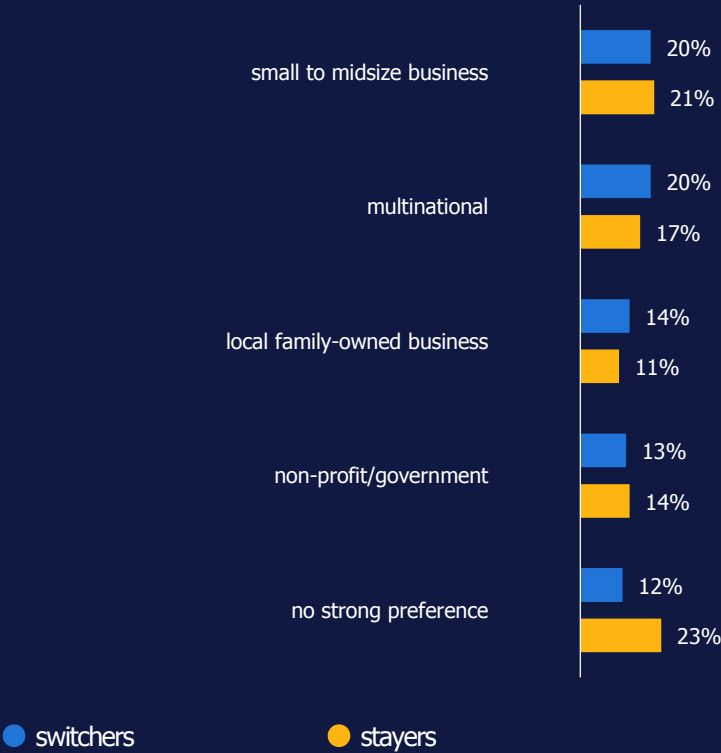


23%

of the stayers have no strong preference.

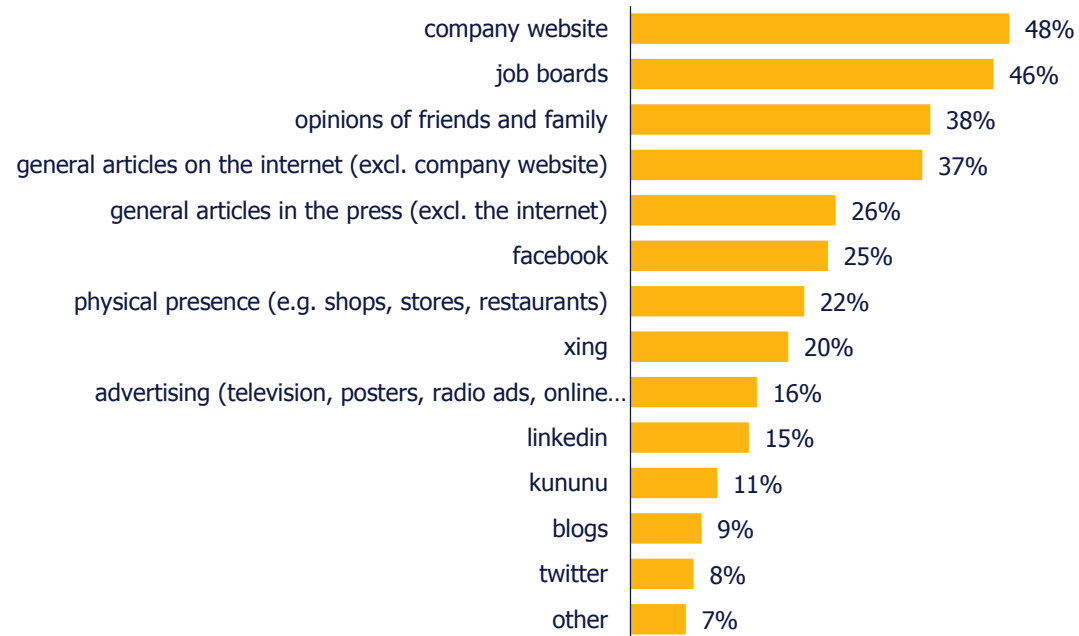


company type preference



88% of the germans check potential employer's reputation.

channels for reputation check



most often used

gen z (18-24)

46%

opinions of family and friends

gen x (35-54)

48%

company website

millennials (25-34)

51%

job boards

boomers (55-64)

25%

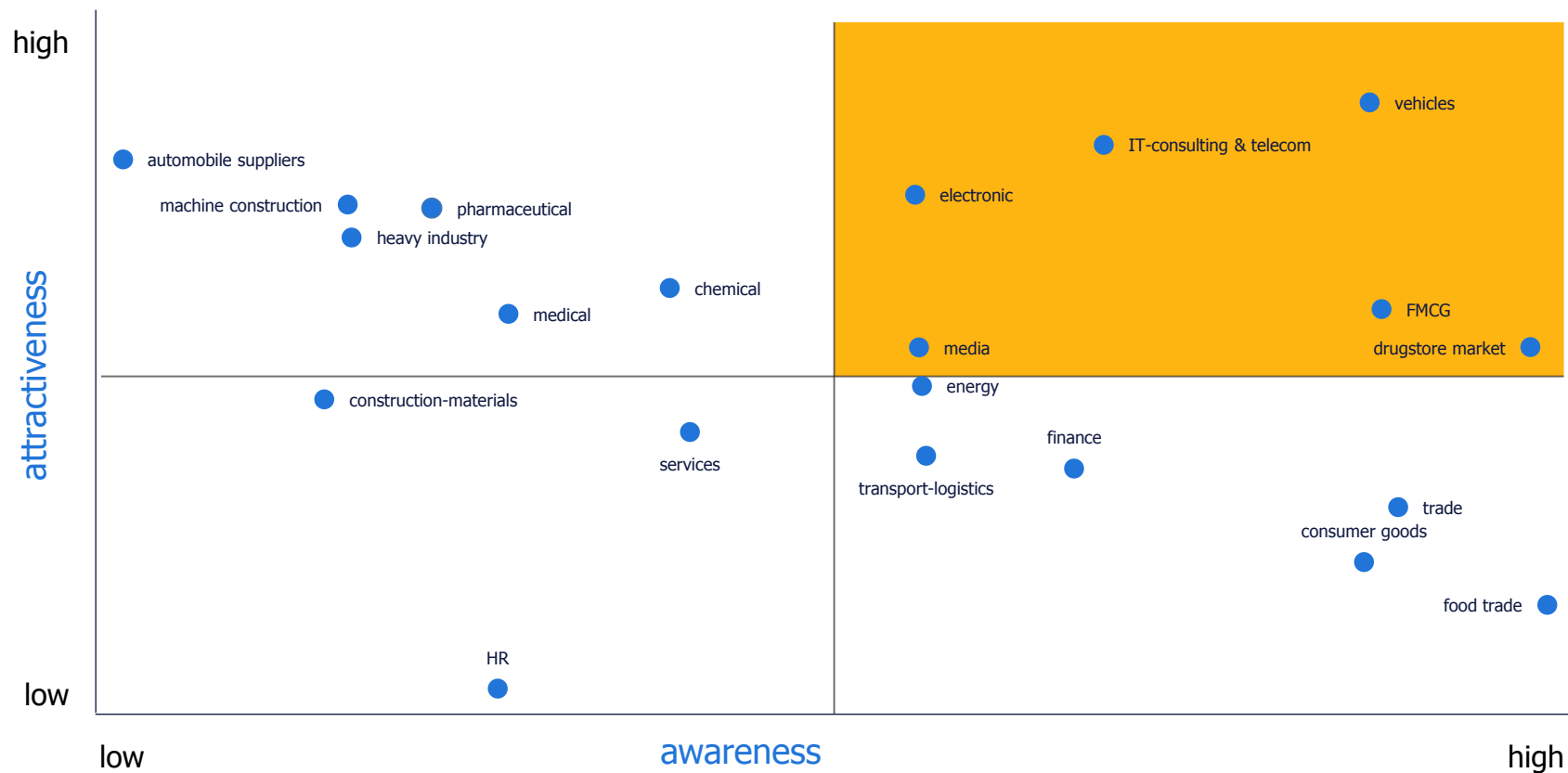
don't check employers'
reputation

sector



insights.

top performing sectors in germany 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.

germany's sectors score best on these 3 EVP drivers.

1/2

	top 3 EVP drivers		
sector	1	2	3
01 vehicles	financially healthy	uses latest technologies	career progression
02 IT-consulting & telecom	financially healthy	uses latest technologies	job security
03 automobile suppliers	financially healthy	uses latest technologies	very good reputation
04 electronic	uses latest technologies	financially healthy	very good reputation
05 machine construction	financially healthy	uses latest technologies	very good reputation
06 pharmaceutical	financially healthy	uses latest technologies	job security
07 heavy industry	financially healthy	uses latest technologies	very good reputation
08 chemical	financially healthy	uses latest technologies	job security
09 FMCG	financially healthy	job security	uses latest technologies
10 medical	job security	financially healthy	uses latest technologies

germany's sectors score best on these 3 EVP drivers.

2/2

	top 3 EVP drivers		
sector	1	2	3
11 drugstore market	financially healthy	very good reputation	job security
12 media	financially healthy	uses latest technologies	career progression
13 energy	financially healthy	job security	uses latest technologies
14 construction-materials	financially healthy	job security	uses latest technologies
15 services	financially healthy	job security	uses latest technologies
16 transport-logistics	financially healthy	job security	uses latest technologies
17 finance	financially healthy	career progression	job security
18 trade	financially healthy	job security	very good reputation
19 consumer goods	financially healthy	job security	very good reputation
20 food trade	financially healthy	job security	very good reputation
21 HR	financially healthy	uses latest technologies	career progression

top



employers.

top employers in germany.

top 10 employers 2019

- 01 Fraunhofer-Gesellschaft
 - 02 ZF Friedrichshafen
 - 03 Lufthansa
 - 04 Daimler (Mercedes-Benz)
 - 05 Audi
 - 06 Porsche
 - 07 Bosch
 - 08 BMW
 - 09 Siemens
 - 10 Voith
-

top 10 employers 2018

- 01 Fraunhofer-Gesellschaft
 - 02 BMW
 - 03 Daimler (Mercedes-Benz)
 - 04 Airbus Group
 - 05 Audi
 - 06 Bosch
 - 07 Porsche
 - 08 ZF Friedrichshafen
 - 09 Siemens
 - 10 IBM
-

germany's top companies

top 3 EVP drivers of the top 5 companies.

	top 3 EVP drivers		
top 5 companies	1	2	3
1 Fraunhofer-Gesellschaft	financially healthy	uses latest technologies	very good reputation
2 ZF Friedrichshafen	financially healthy	uses latest technologies	very good reputation
3 Lufthansa	uses latest technologies	financially healthy	interesting job content
4 Daimler (Mercedes-Benz)	financially healthy	uses latest technologies	job security
5 Audi	financially healthy	uses latest technologies	job security

top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	Porsche	Daimler (Mercedes-Benz)	SAP
career progression	SAP	IBM	Fraunhofer-Gesellschaft
financially healthy	Coca-Cola	Porsche	SAP
gives back to society	Fraunhofer-Gesellschaft	Heraeus	Schön-Klinik
interesting job content	Fraunhofer-Gesellschaft	SAP	ZF Friedrichshafen
job security	Fraunhofer-Gesellschaft	Porsche	SAP
work atmosphere	ZF Friedrichshafen	Fraunhofer-Gesellschaft	Benteler
uses latest technologies	SAP	IBM	Fraunhofer-Gesellschaft
very good reputation	Fraunhofer-Gesellschaft	Porsche	Adidas
work-life balance	MAHLE	Fraunhofer-Gesellschaft	Benteler

deep dive

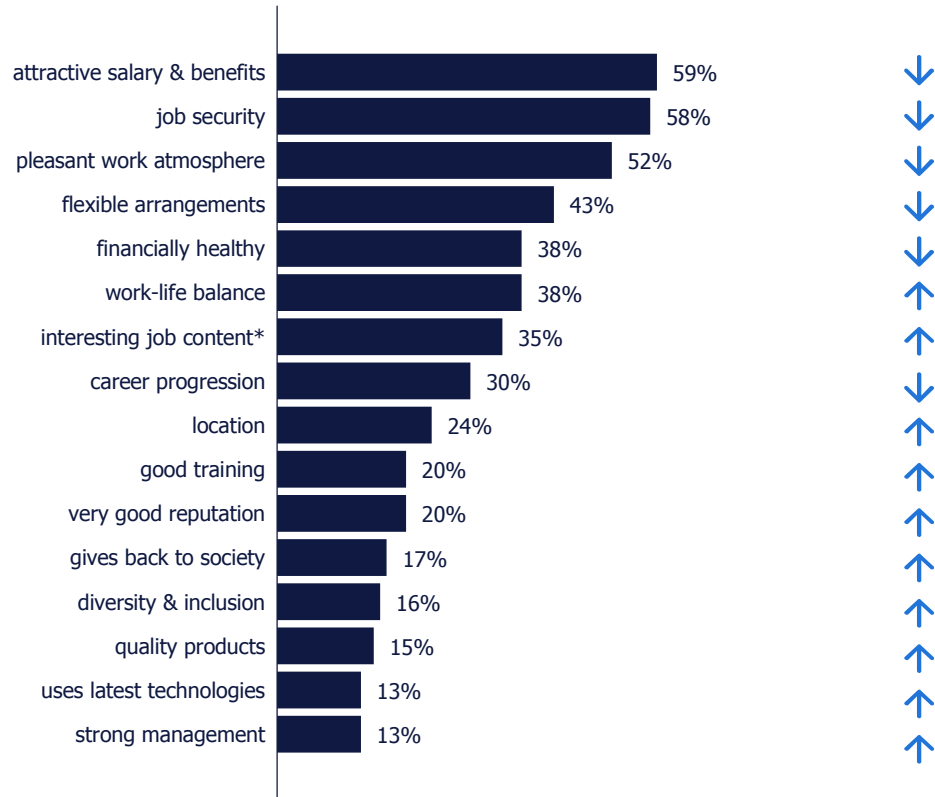
appendix 1.



what potential employees want

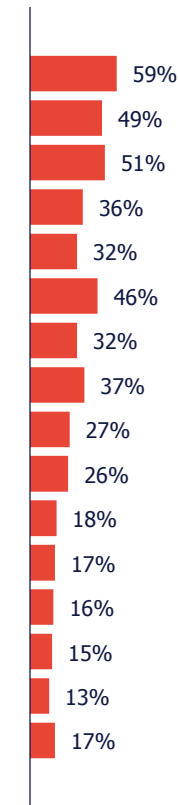
the most important criteria when choosing an employer.

important criteria

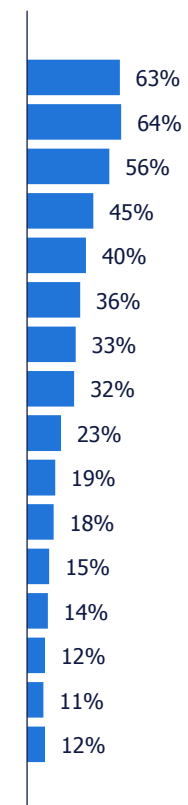


Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.

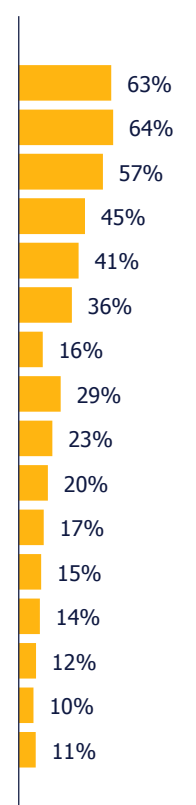
europe



2018

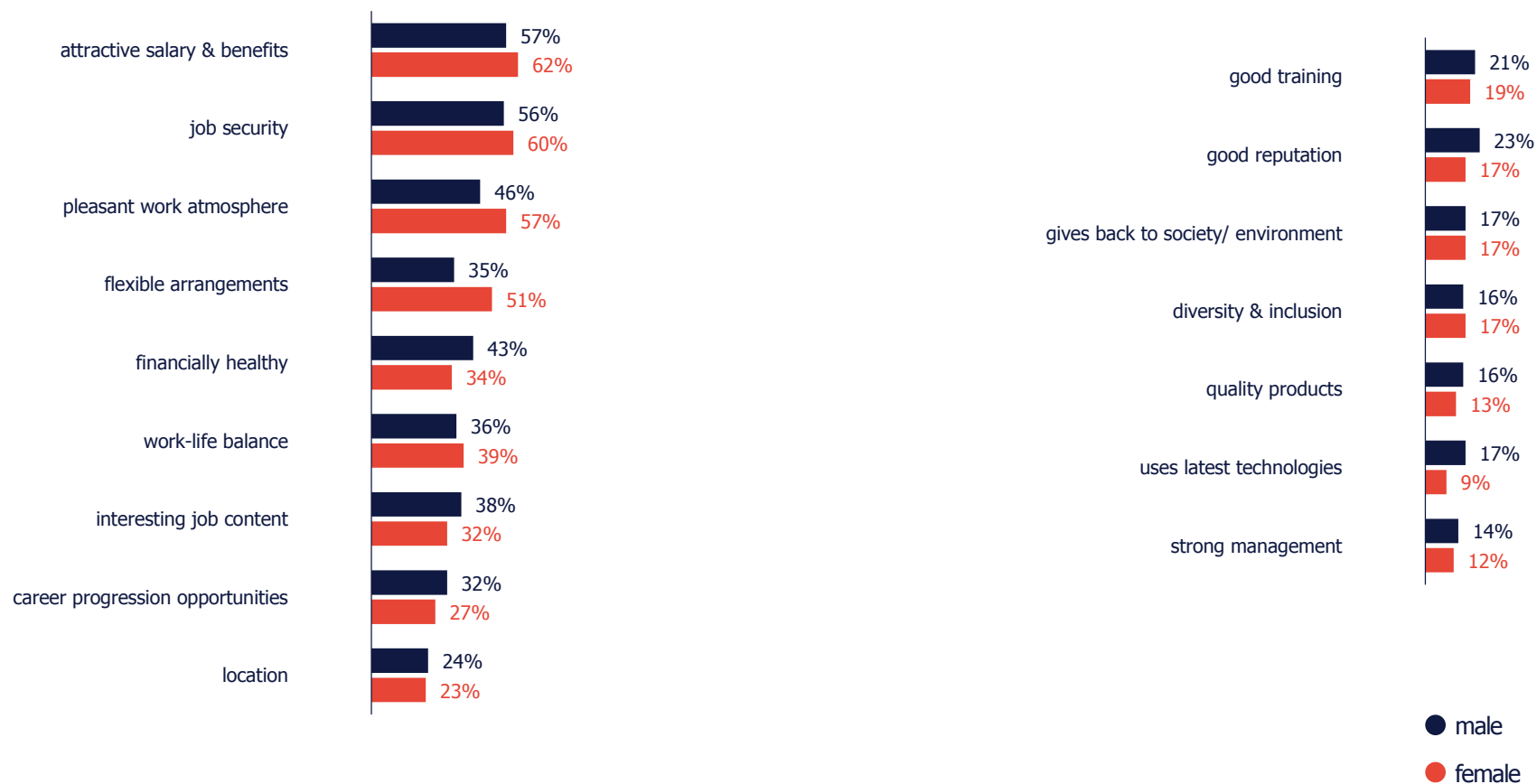


2017

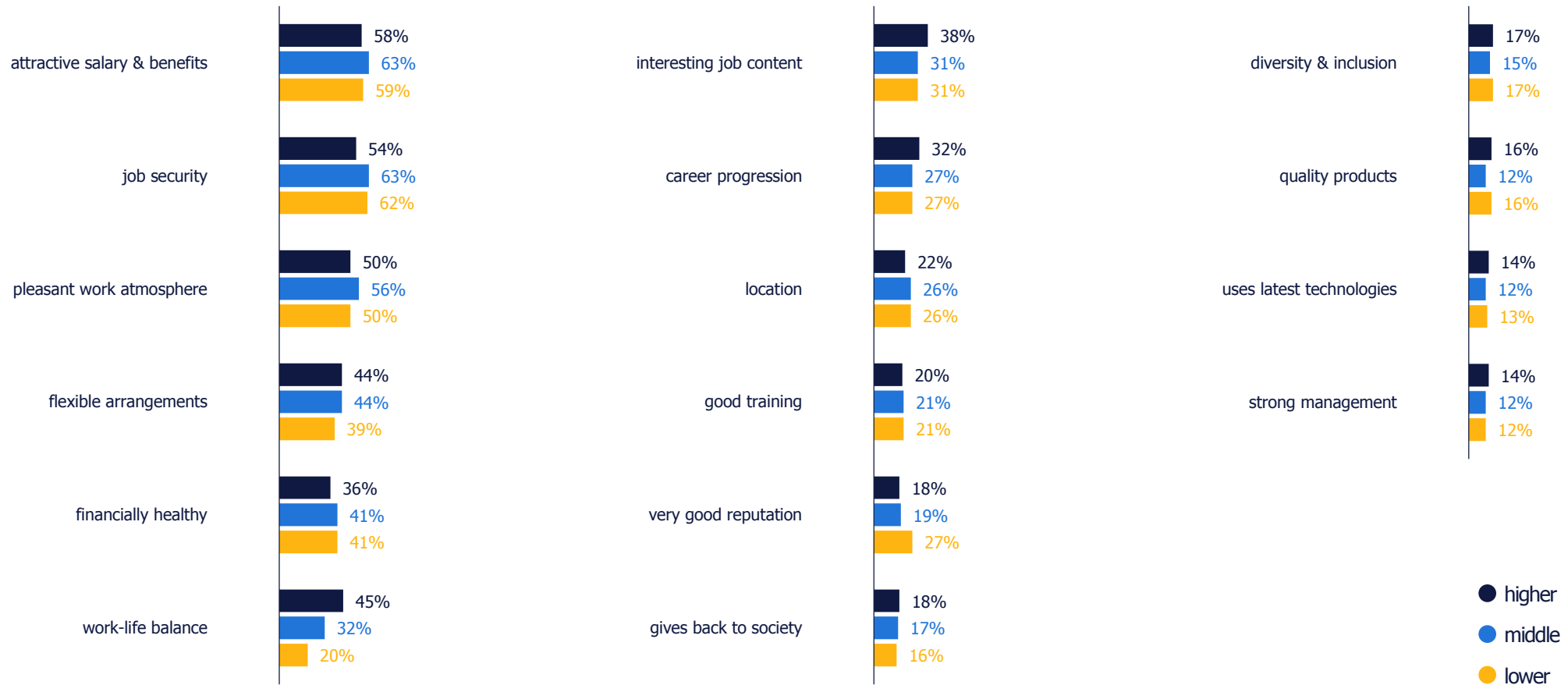


*2017: work that is stimulating and challenging

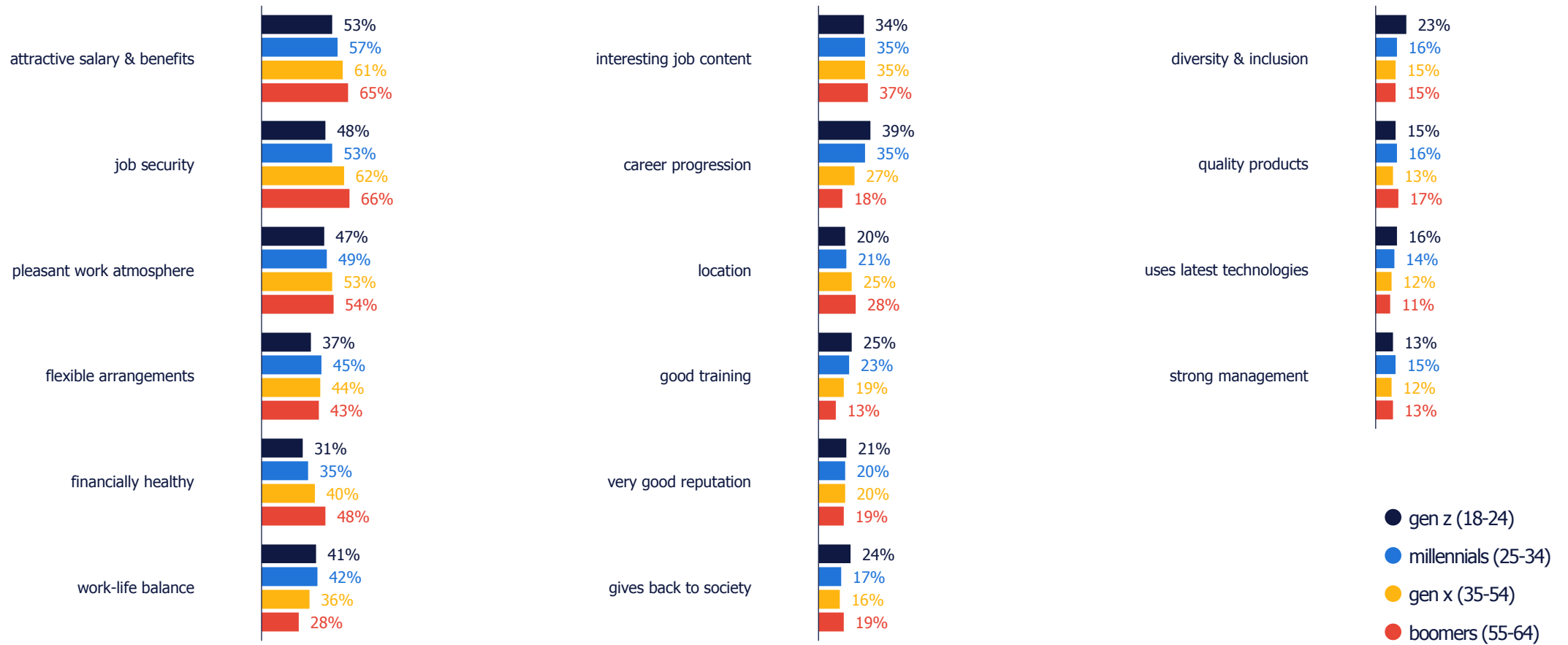
EVP driver importance by gender.



EVP driver importance by education.



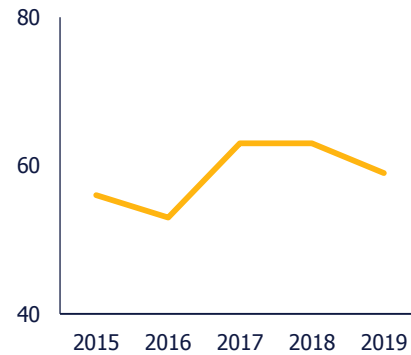
EVP driver importance by age.



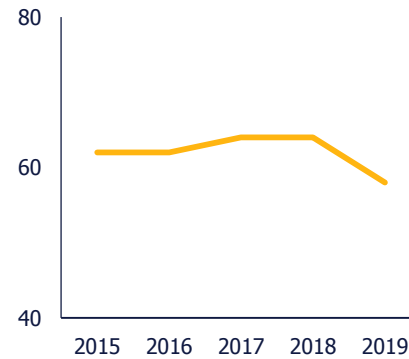
EVP driver importance trends, total.

1/2

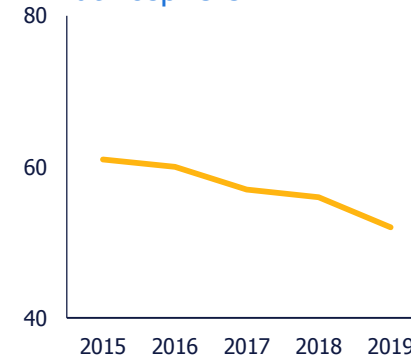
attractive salary & benefits



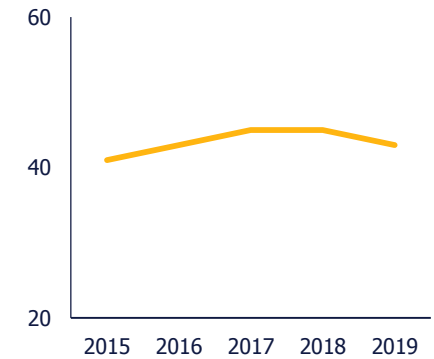
job security



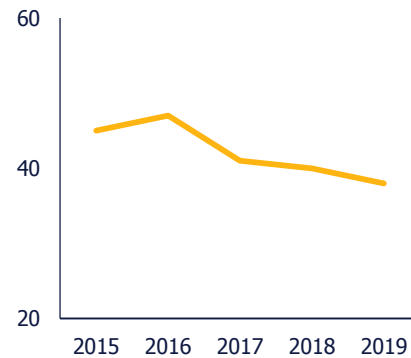
pleasant work atmosphere



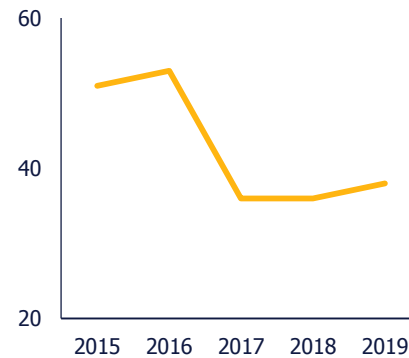
flexible arrangements



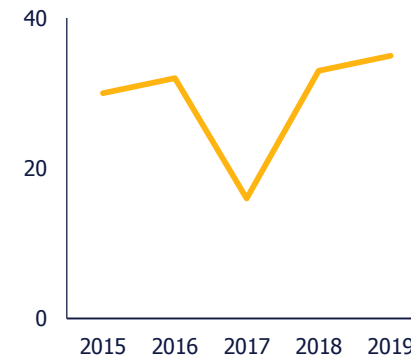
financially healthy



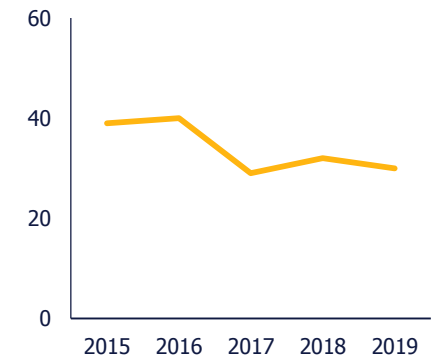
work-life balance



interesting job content*



career progression



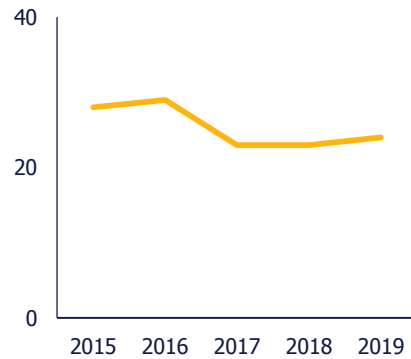
*2017: work that is stimulating and challenging



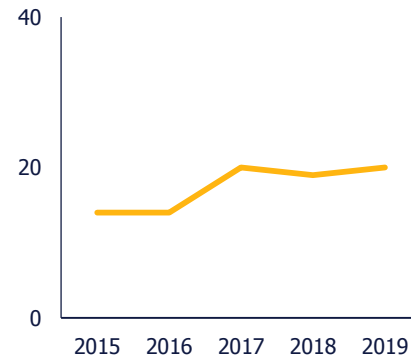
EVP driver importance trends, total.

2/2

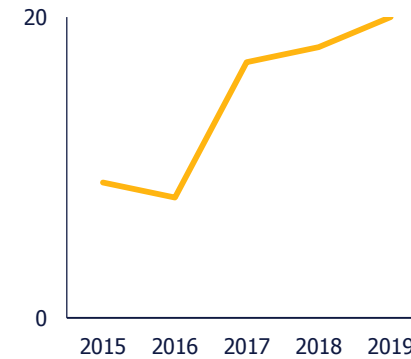
location



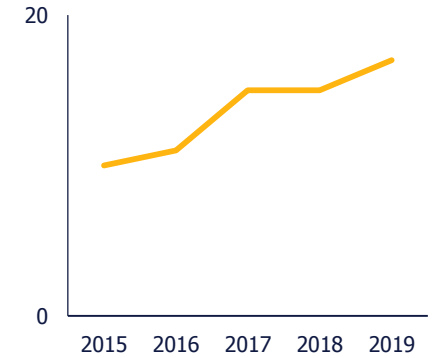
good training



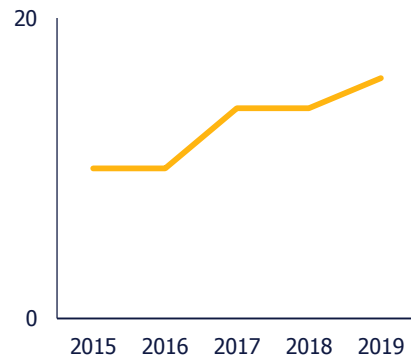
very good reputation*



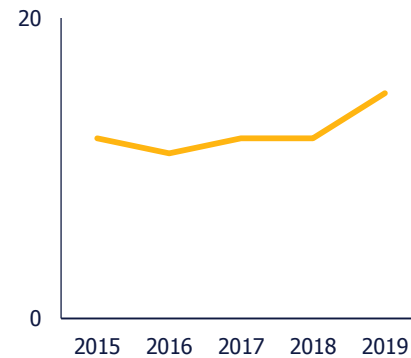
gives back to society



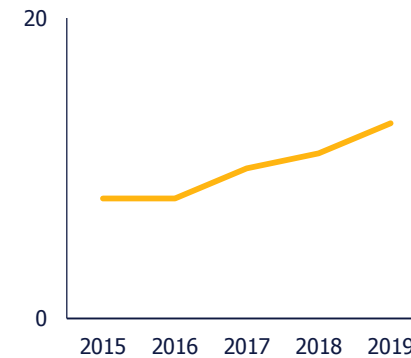
diversity & inclusion



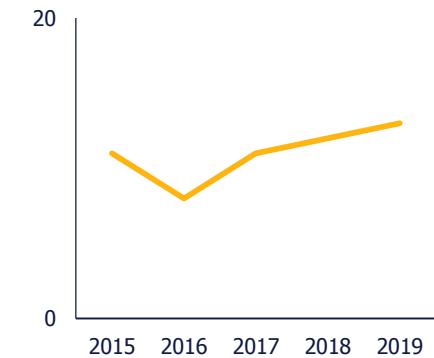
quality products



uses latest technologies



strong management

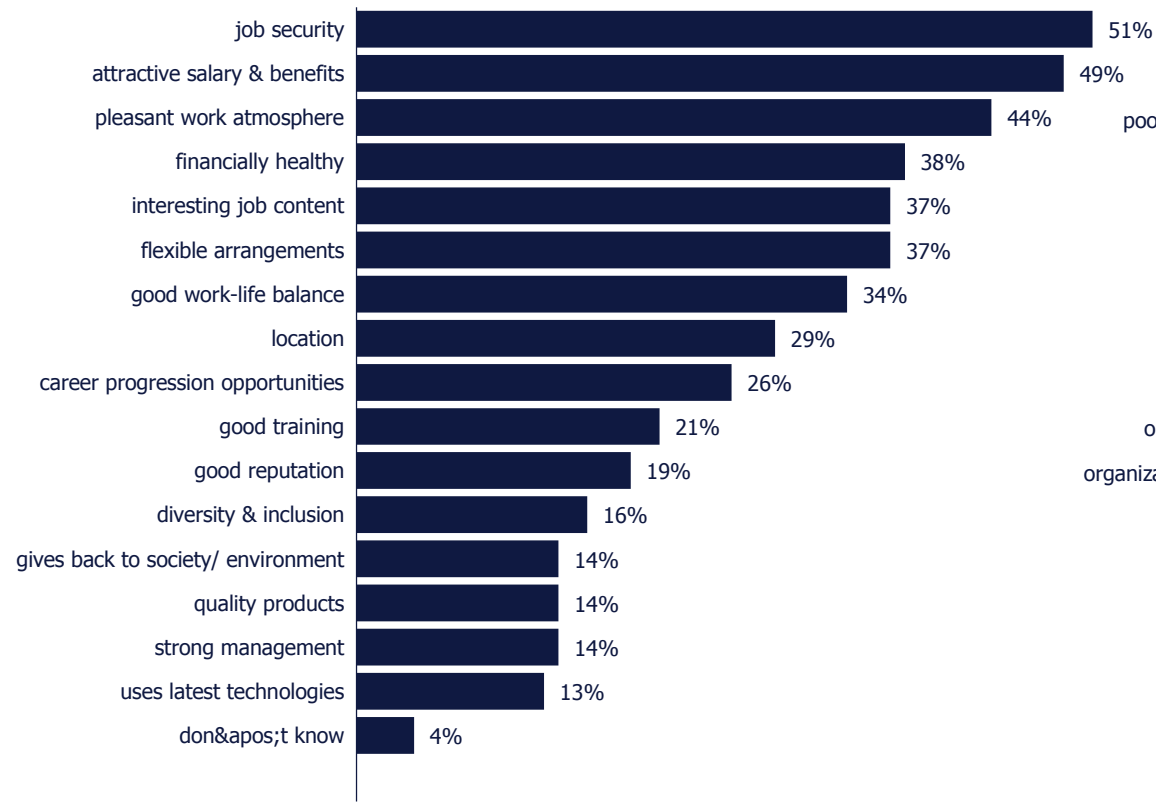


*previous to 2017: strong image/strong values



what factors do the germans 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.

Randstad Germany

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randstad

human forward.

