

employer
brand research
2019



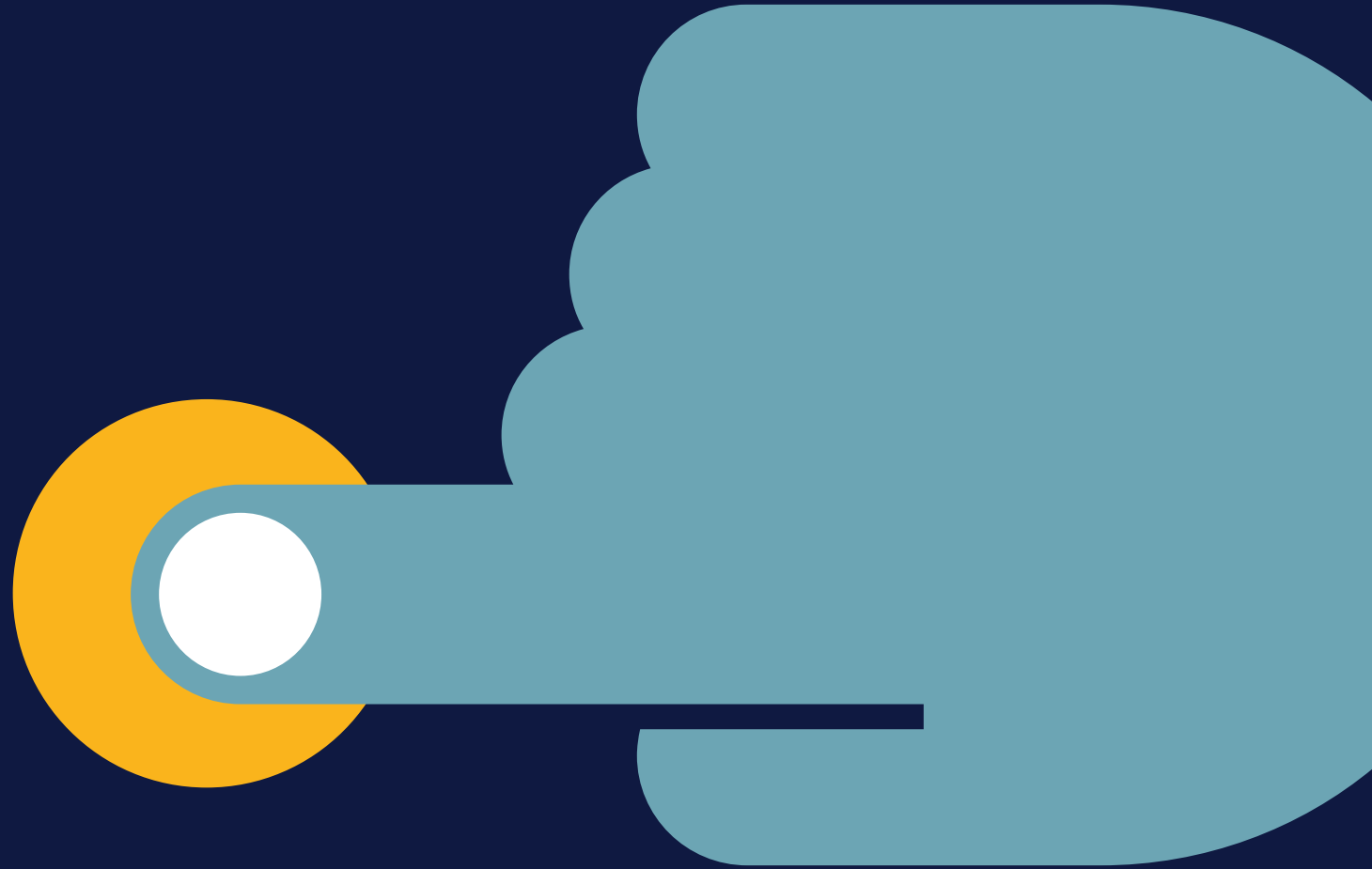
country report
india.

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

- 3,172 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.

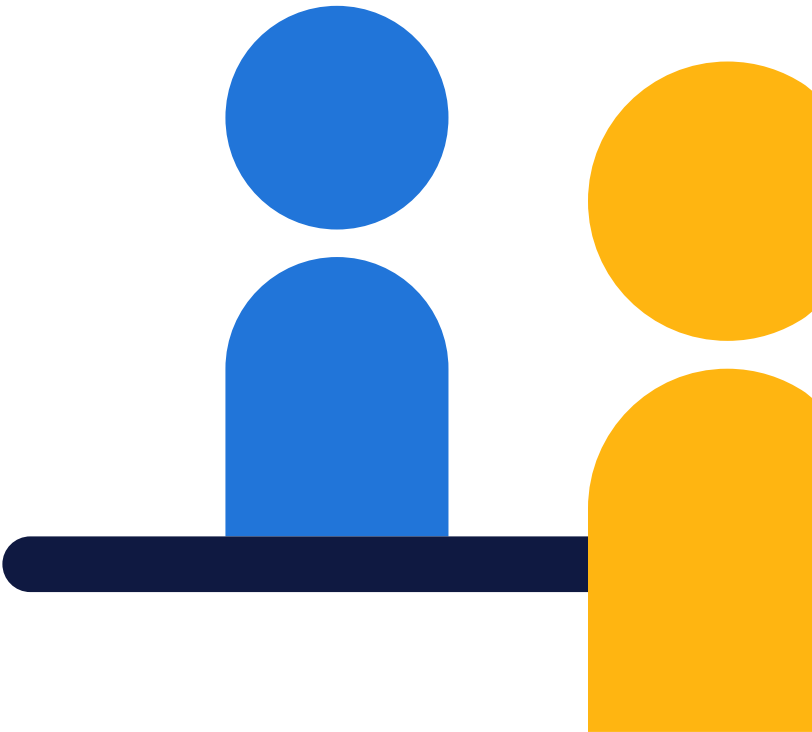
In order to make sure that the less well known brands are assessed by a sufficient number of respondents, we make use of a smart sampling method.

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.



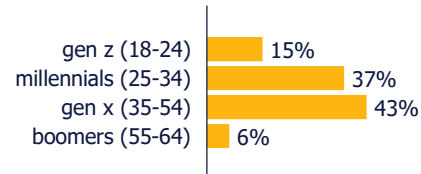
sample composition in india

socio-demographics, employment situation, region.

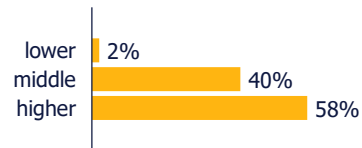
gender



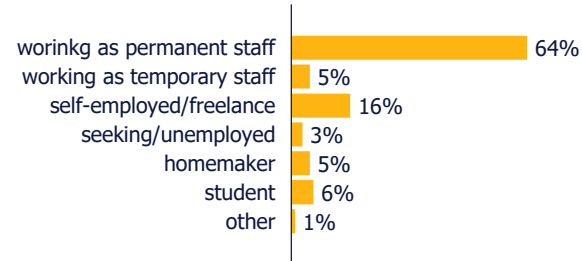
age



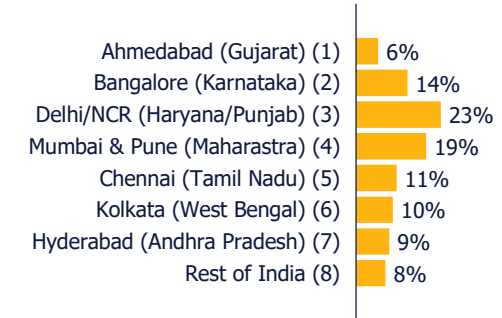
education



situation



region

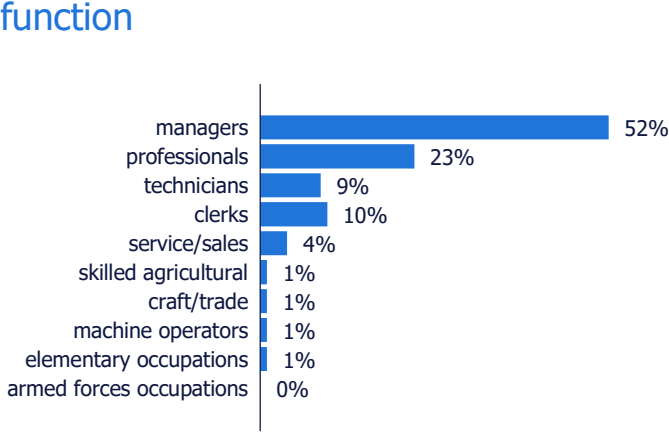
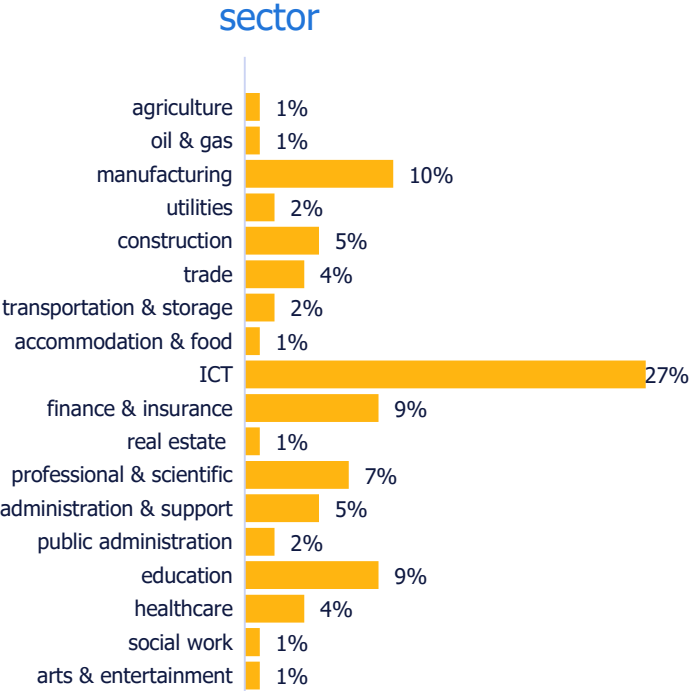


1. Ahmedabad, Rest of Gujarat (not Ahmedabad)
2. Bangalore, Rest of Karnataka (not Bangalore)
3. Delhi/NCR, Rest of Haryana/Punjab (not Delhi/NCR)
4. Mumbai, Pune, Rest of Maharashtra (not Mumbai or Pune)
5. Chennai, Rest of Tamil Nadu (not Chennai)
6. Kolkata, Rest of West Bengal (not Kolkata)
7. Hyderabad, Rest of Telangana and Andhra Pradesh (not Hyderabad)
8. Rest of India (none of the above)

total sample: 3,172
fieldwork: 3 december 2018 to 11 january 2019



sample composition in india

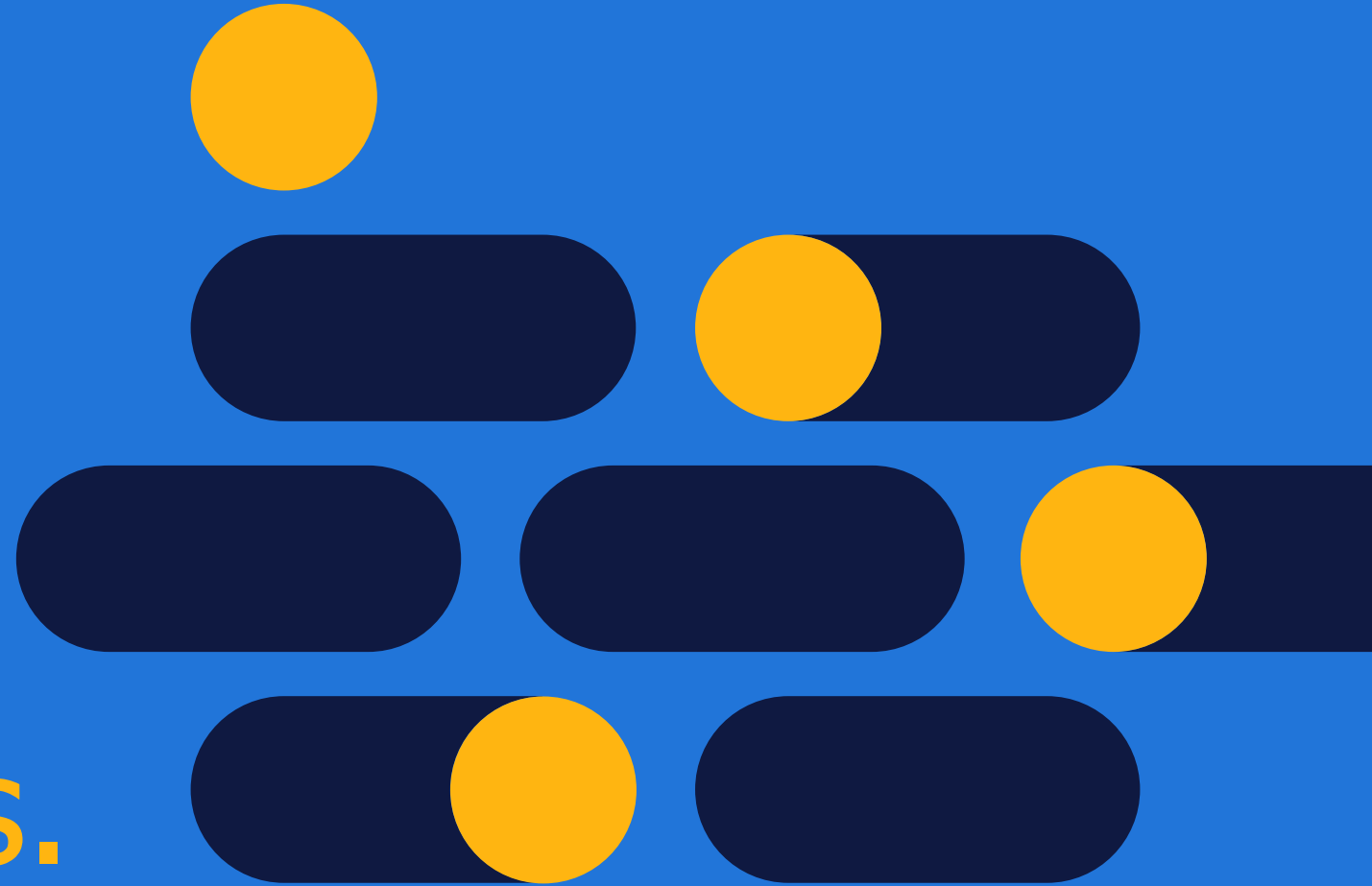


base: currently employed (n=2.700)

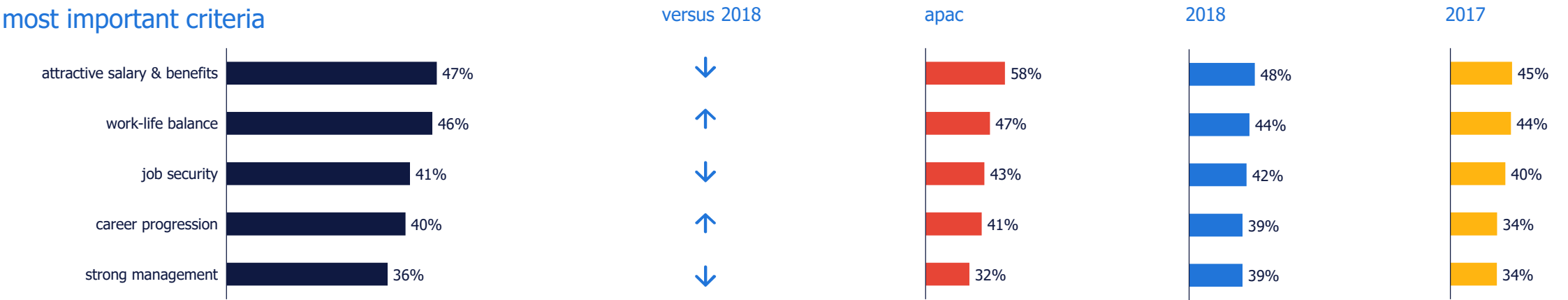


country

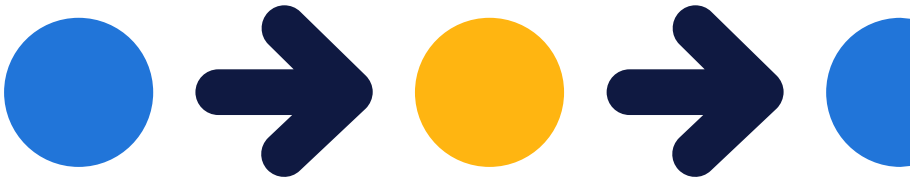
EVP drivers.



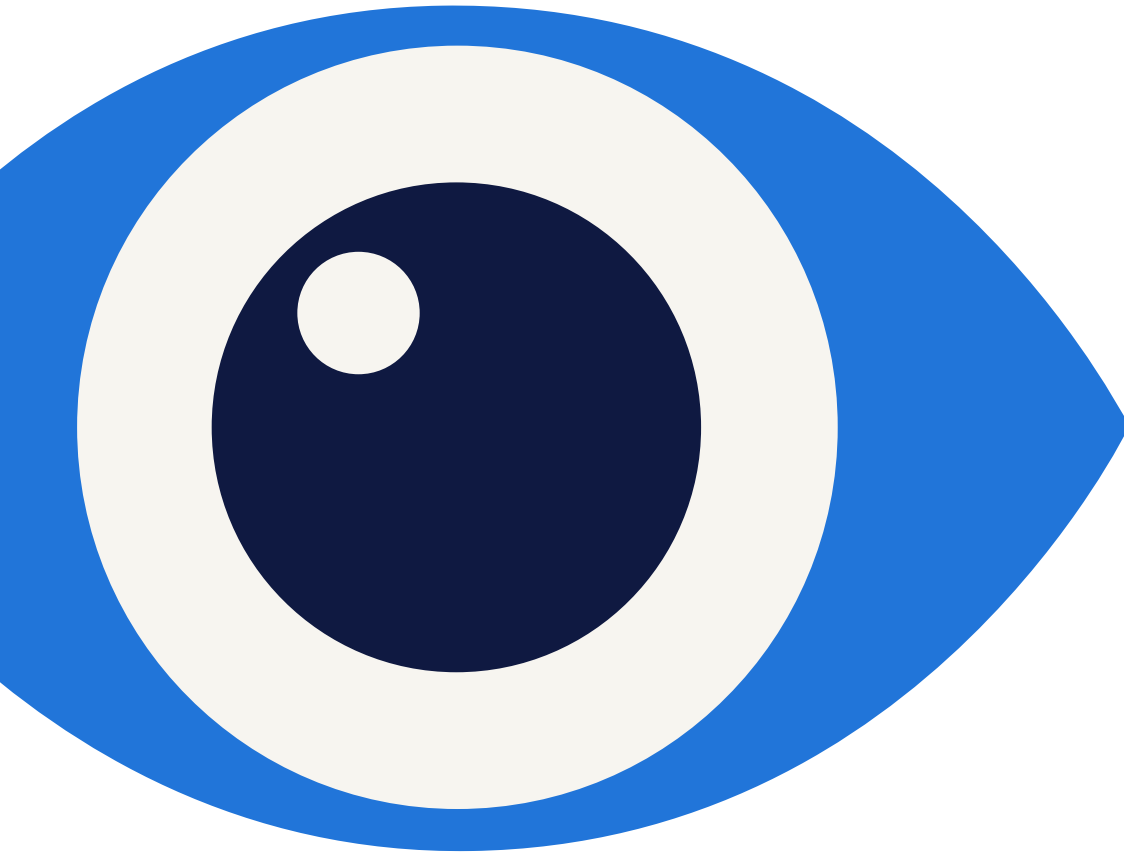
what potential employees want when choosing an employer.



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



perception of employer offer in india and the region.



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

employers in india are perceived to offer.

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

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 india.

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 work-life balance
 - 3 job security
-



what do potential employees want by generational profile.

gen z (18-24)

37%

of the gen z's are looking an employer who offers good training. This is higher when compared to older workforce.

gen x (35-54)

49%

of the gen x's are looking for good work-life balance. Among younger generations, this factor is deemed less important.

millennials (25-34)

25%

of the millennials seek an employer who offers interesting job content. Older generations are less interested in this offering from their employer.

boomers (55-64)

46%

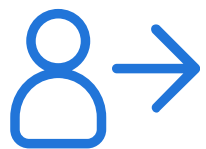
of the boomers are attracted to employers who have a strong management. This is less so among the younger generations.



[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.



10%

of today's workforce
works part-time.

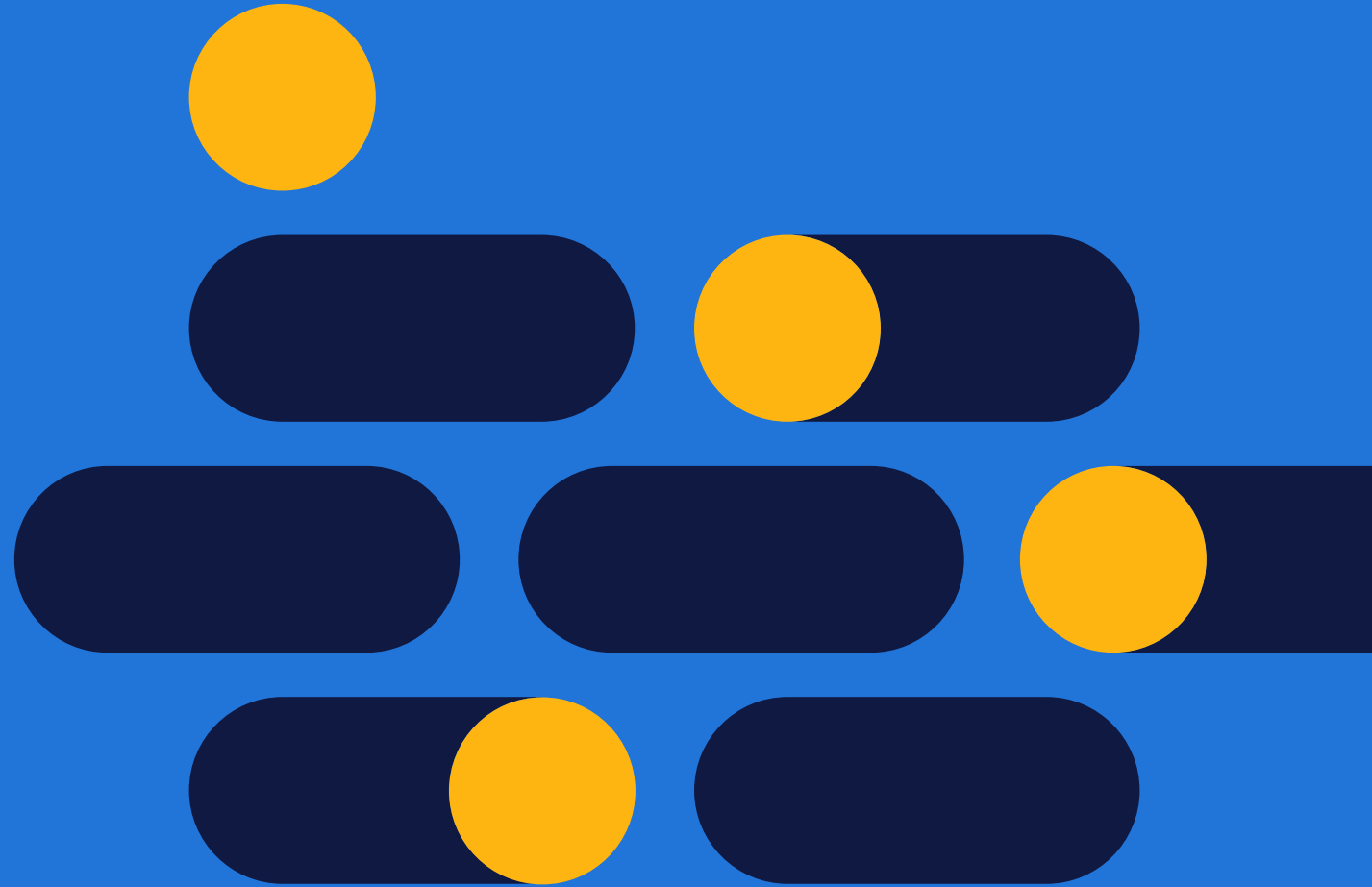


most important attributes



switchers and stayers

in focus.



changing employer india vs apac.

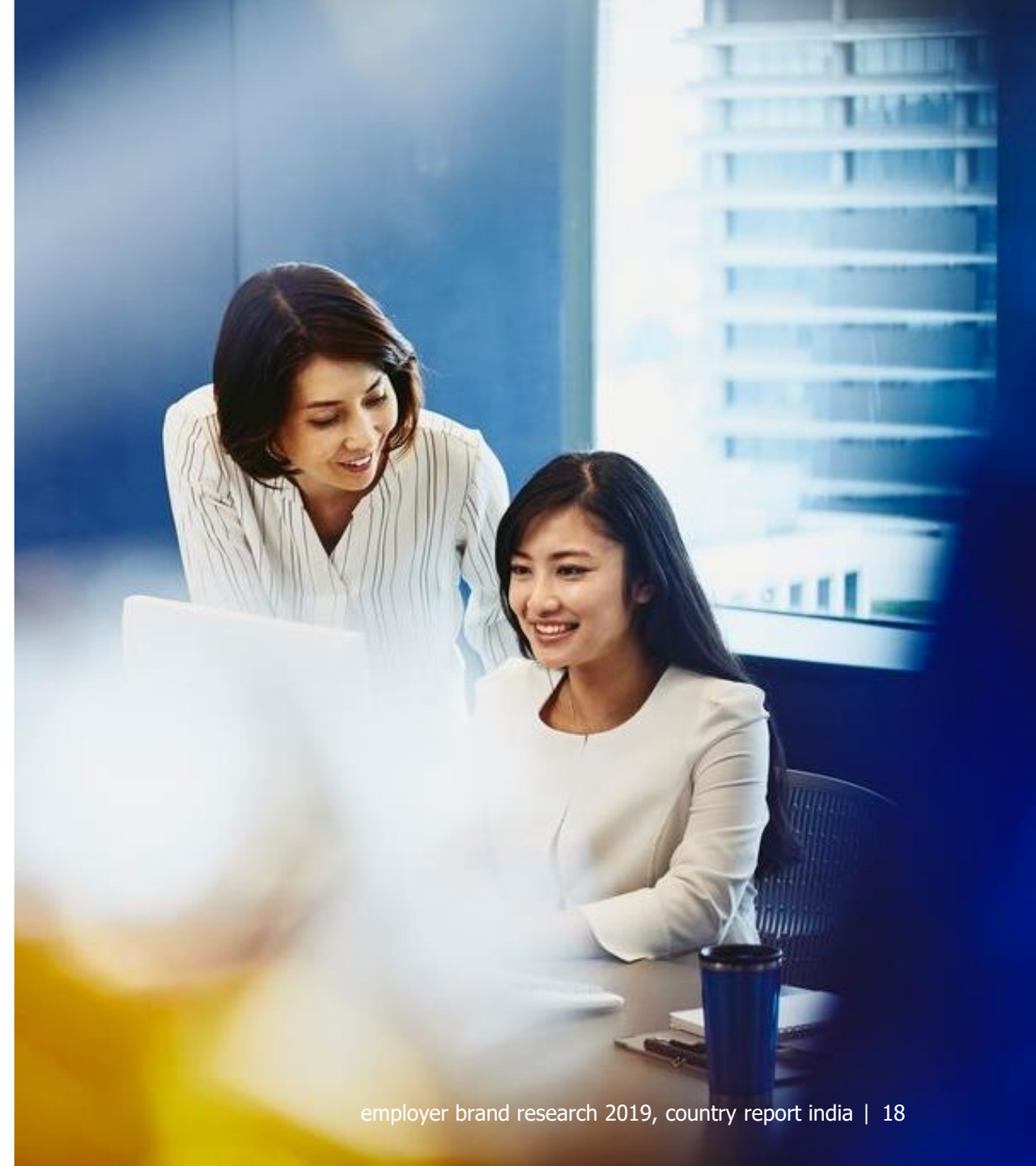
switchers: changed employer in the past year.



stayers: stayed with their employer in the past year.

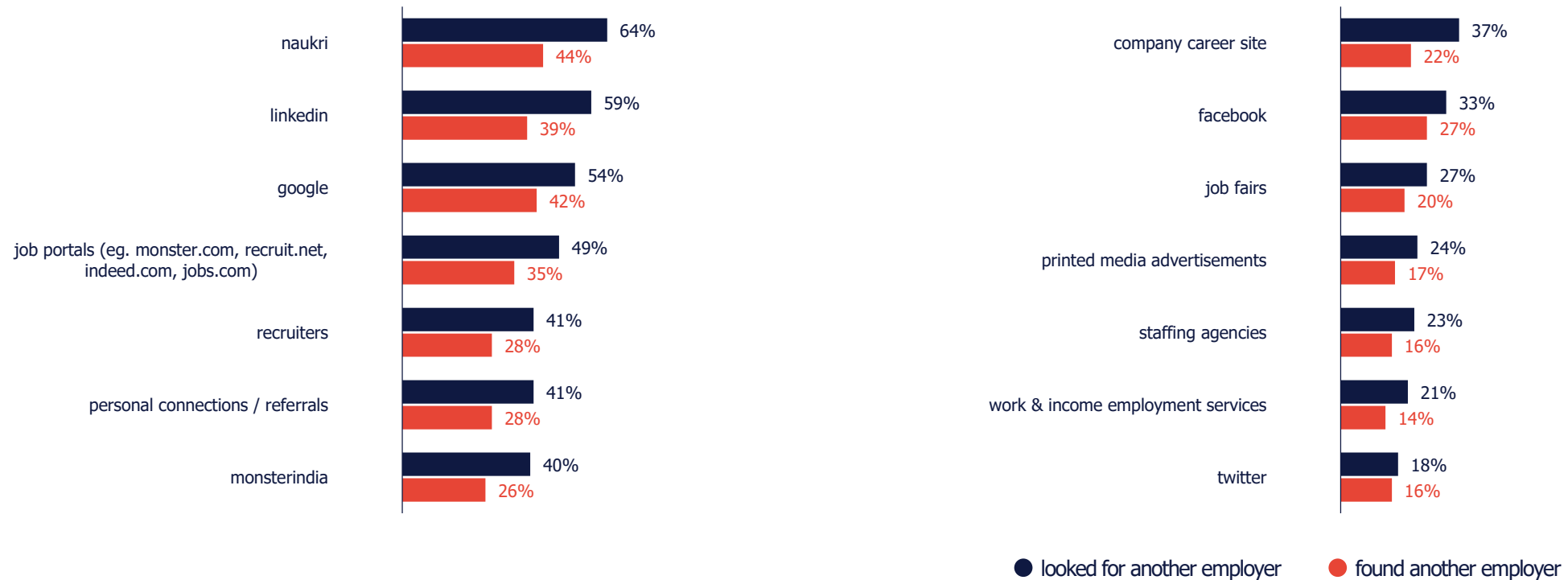


intenders: plan to change employer within the next year.

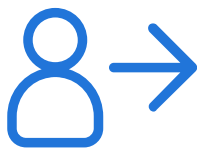


how do the indians workers look for and find employers.

channels used to look for and find employers



most important attributes switchers vs stayers.



29% (28%)*

switchers: changed
employer in
the past year.



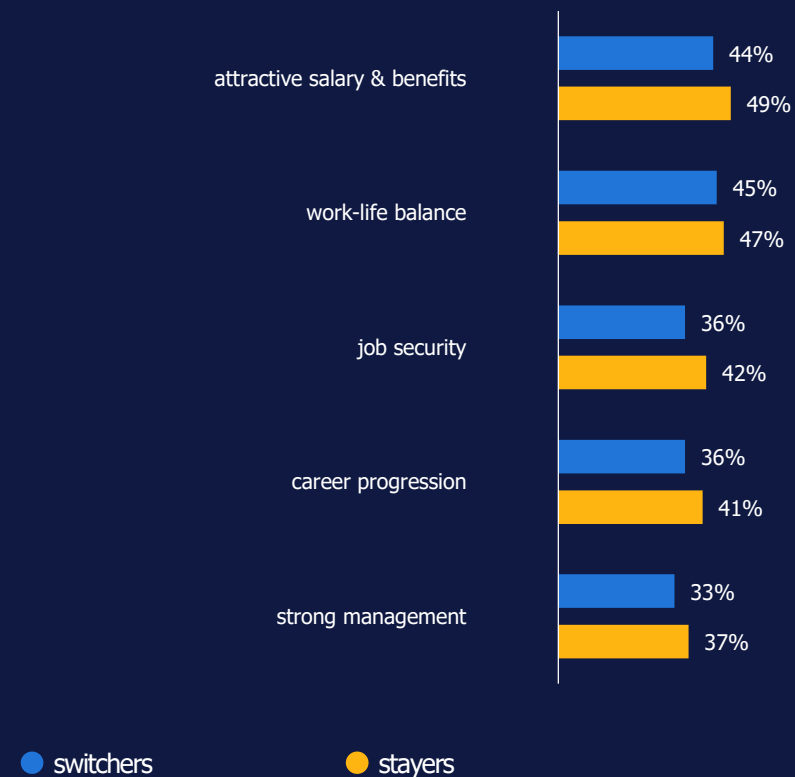
71% (72%)*

stayers: stayed with their
employer
in the past year.

*in 2018



most important attributes



most important attributes intenders.



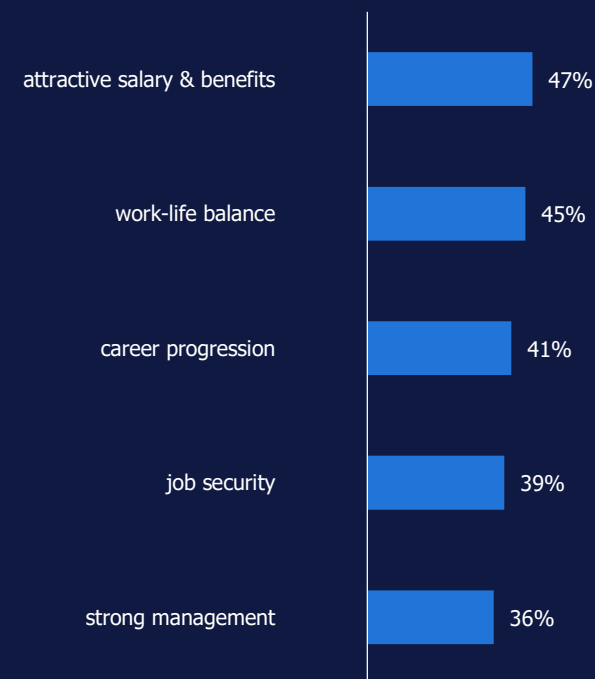
45% (46%)*

intenders: plan to
change employer
within the next year.

*in 2018

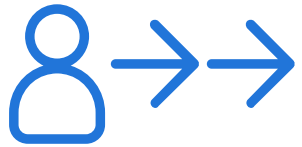


most important attributes



● intenders

channels to look for employers intenders.



69% (66%)*

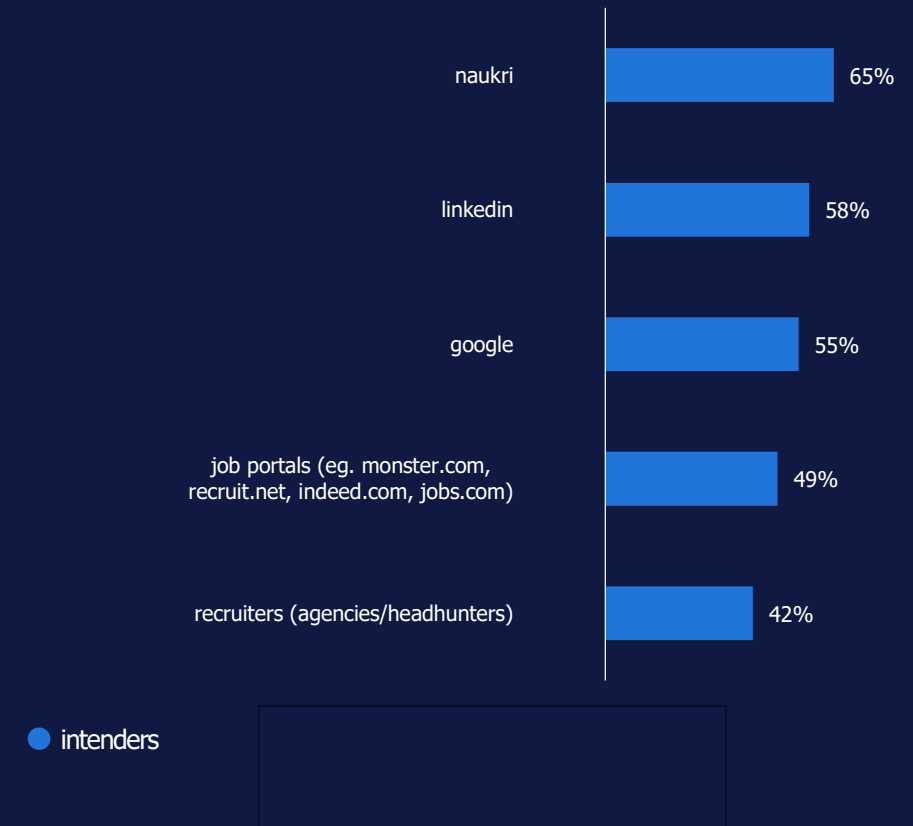
of last year's switchers**
intend to switch again
next year.

** n= 915 switched last year

*in 2018



channels to look for employers

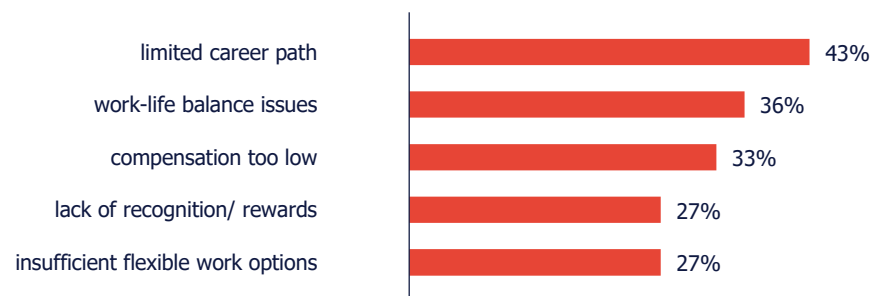


why do indians stay or leave.

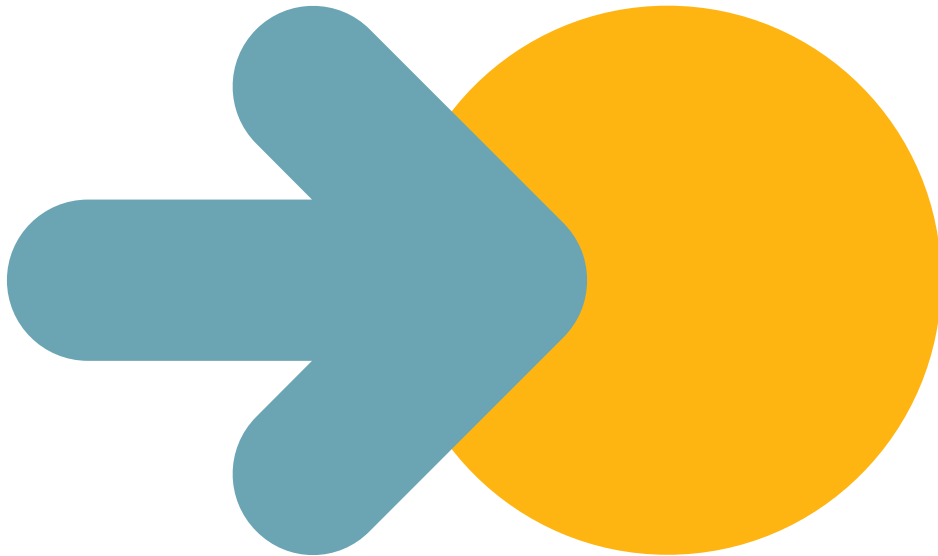
main reasons to stay



main reasons to leave



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



gen z (18-24)

33%

of the gen z's are staying with their employer if they offer good training. This is higher when compared to gen x.

gen x (35-54)

42%

of the gen x's stay with their employer if they have a good work-life balance.

millennials (25-34)

33%

of the millennials stay if their employer is conveniently located.

boomers (55-64)

54%

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

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

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

gen z (18-24)

26%

of the gen z's are leaving if their employer is not financially stable.

gen x (35-54)

45%

of the gen x's if they lack career opportunities.

millennials (25-34)

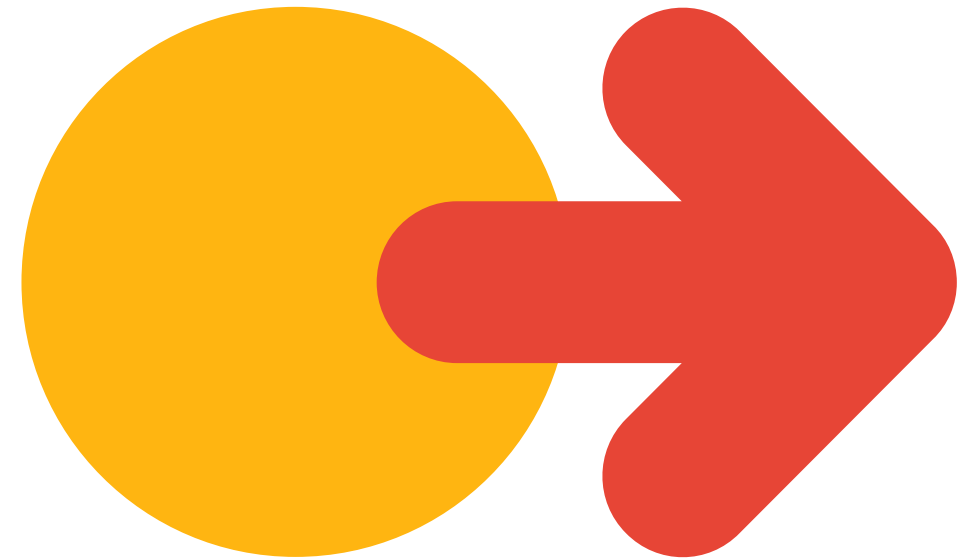
21%

of the millennials leave their employer if they offer little or no advantages (e.g. company phone etc.). Gen x are less interested in this offering from their employer.

boomers (55-64)

43%

of the boomers leave their employers if they have work-life issues.

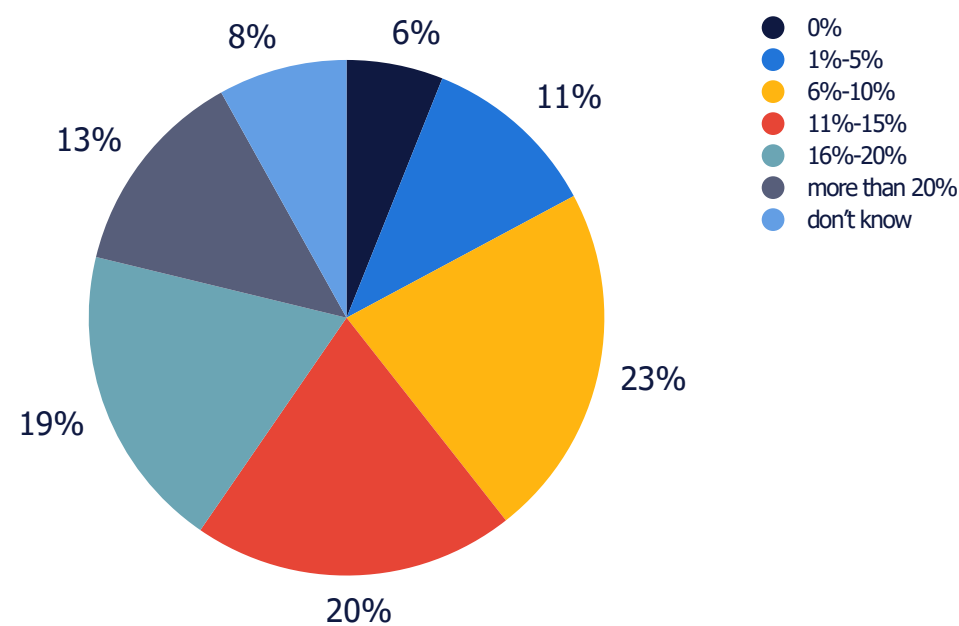


[click here](#) for a breakdown of all results.



willingness to forfeit salary for more work security.

amount of salary employees are willing to forfeit



india

52%

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

apac

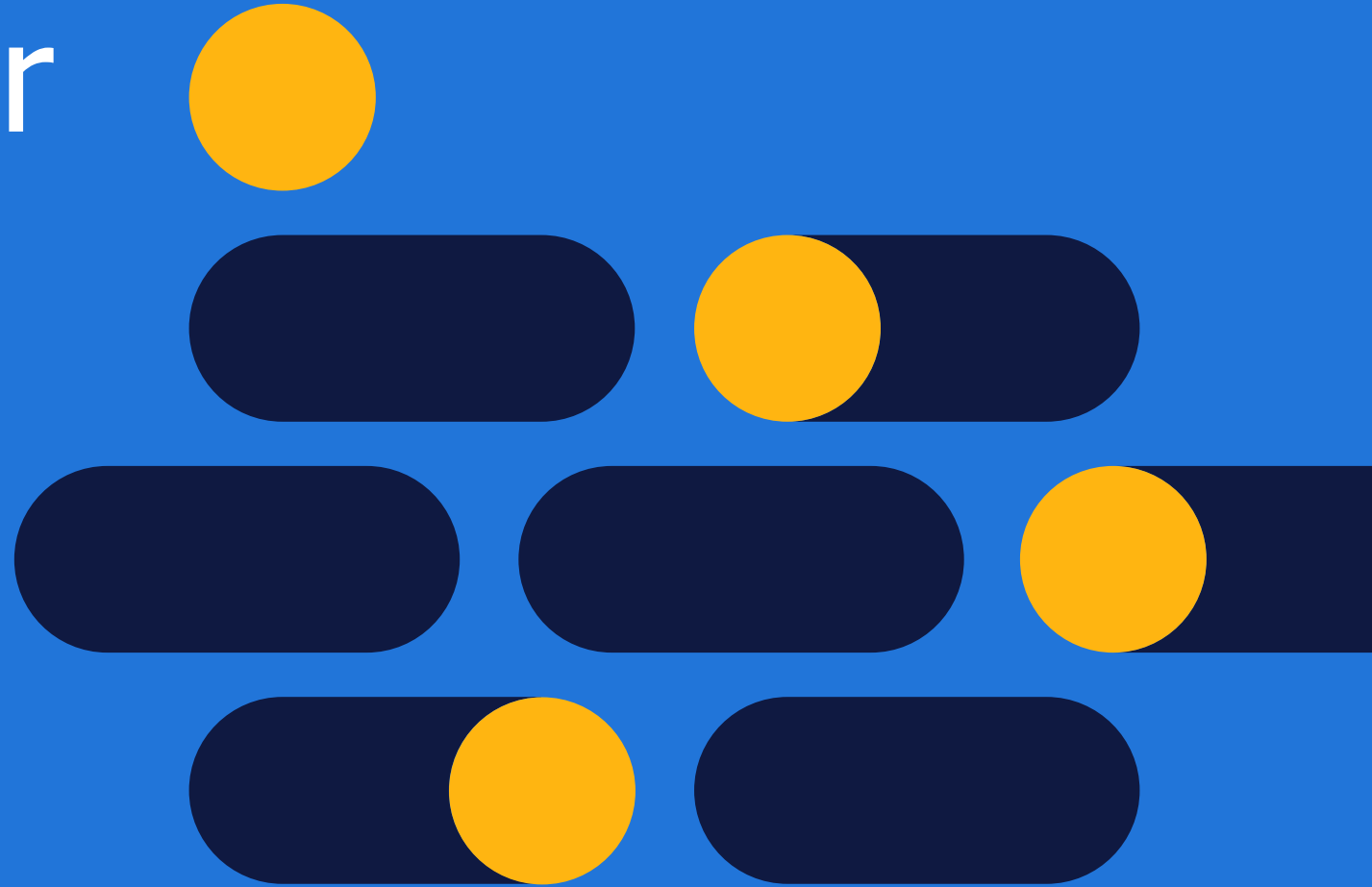
29%

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



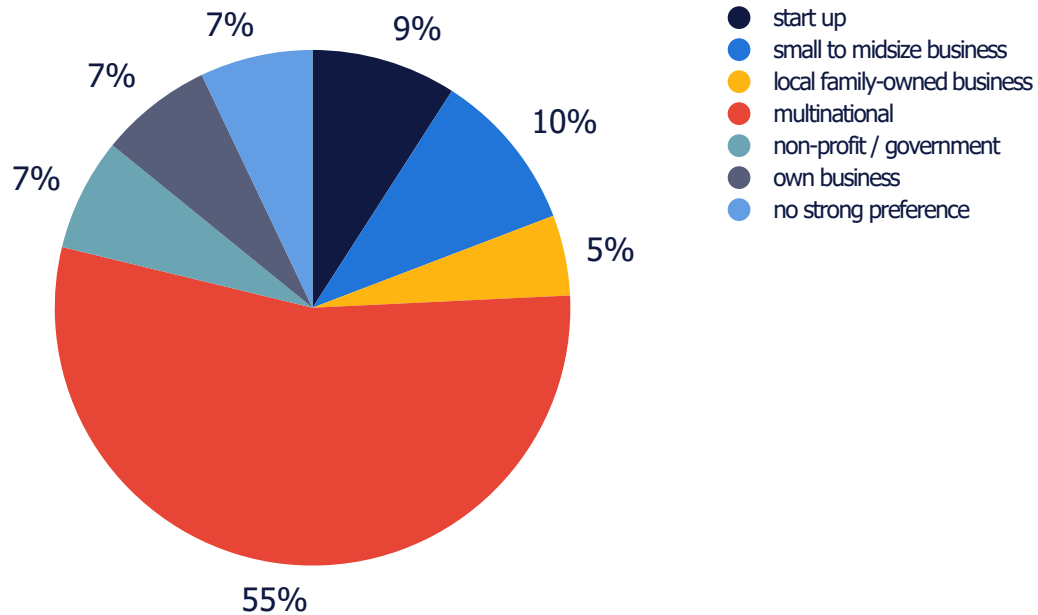
ideal employer

in focus.



55% of the indians prefer to work for large (multinational) corporation.

preferred company type



gen z (18-24)

19%

would prefer to work for a start-up

gen x (35-54)

10%

would rather have their own business

millennials (25-34)

60%

would prefer to work for a large (multinational) corporation

boomers (55-64)

17%

have no strong preference

company type preference

reasons why.

multinational (55%)

job security
financial health
career progression

small to midsize business (10%)

work-life balance
job security
pleasant work atmosphere

start-up (9%)

career progression
work-life balance
interesting job content

non-profit / government (7%)

job security
work-life balance
financial health

own business (7%)

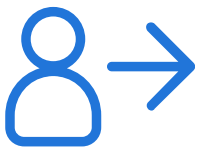
work-life balance
financial health
job security

local family-owned (5%)

financial health
work-life balance
very good reputation



company type preference switchers vs stayers.



13%

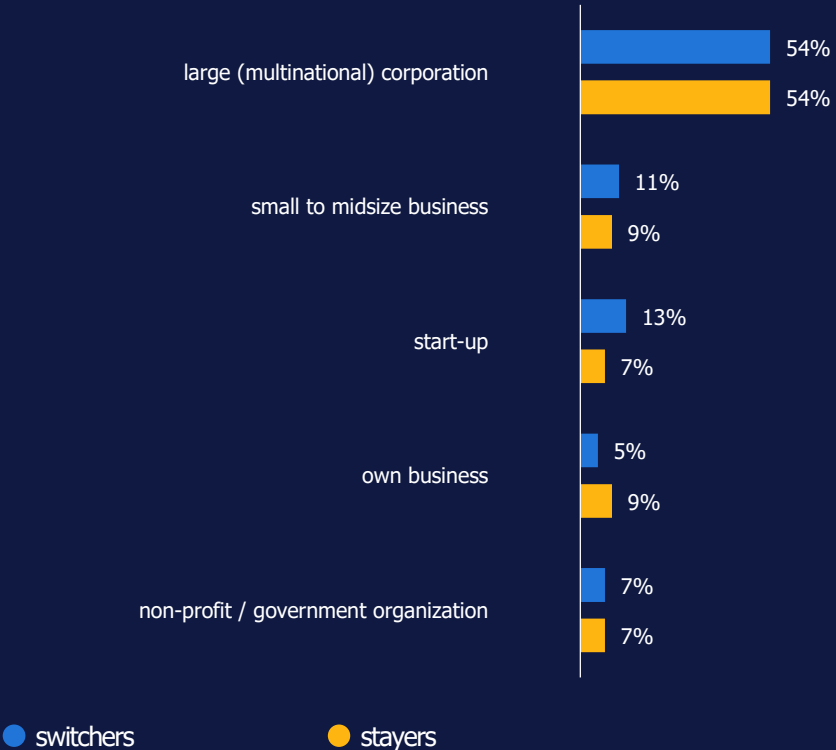
of the switchers prefer to work for a start-up.



54%

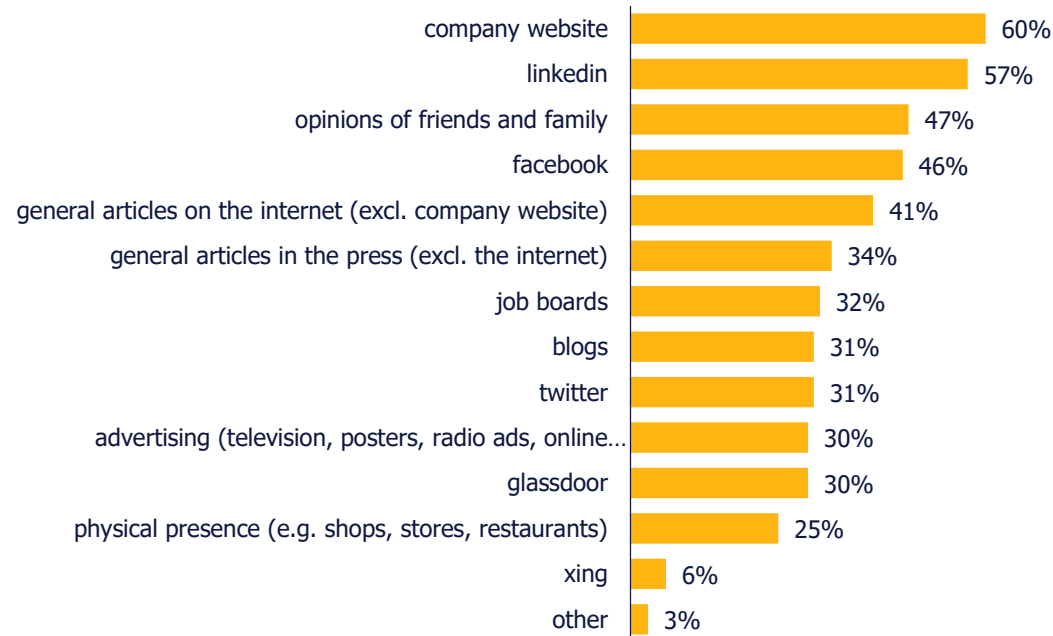
of the stayers prefer to work for a large (multinational) corporation.

company type preference



97% of the indians check potential employer's reputation.

channels for reputation check



most often used

gen z (18-24)

61%

linkedin

gen x (35-54)

63%

company website

millennials (25-34)

53%

facebook

boomers (55-64)

56%

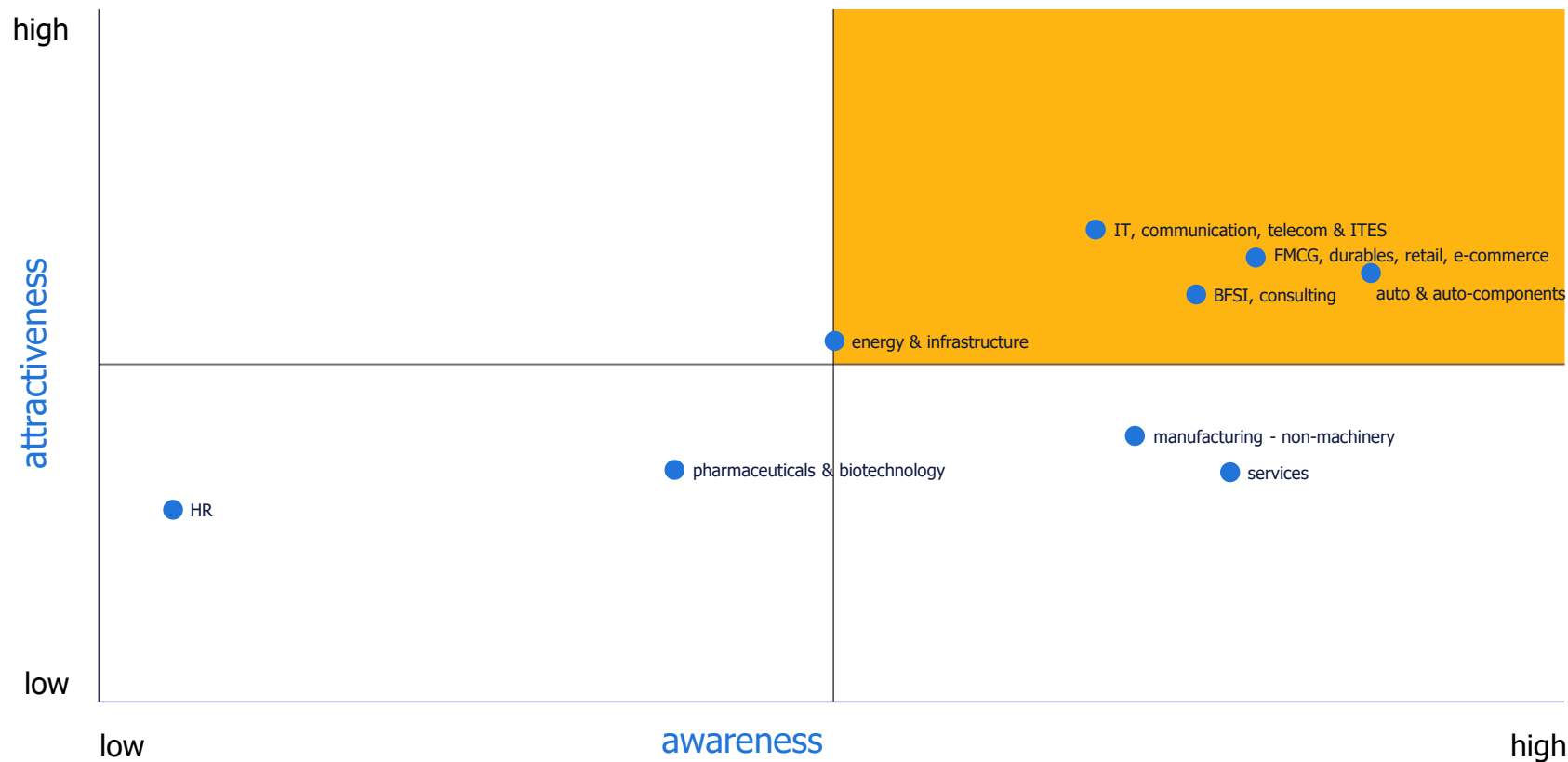
opinions of friends and family

sector



insights.

top performing sectors in india 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.

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

| | | top 3 EVP drivers | | |
|--------|------------------------------------|--------------------------|--------------------------|--------------------------|
| sector | | 1 | 2 | 3 |
| 01 | IT, communication, telecom & ITES | uses latest technologies | financially healthy | very good reputation |
| 02 | FMCG, durables, retail, e-commerce | financially healthy | very good reputation | uses latest technologies |
| 03 | auto & auto-components | financially healthy | very good reputation | uses latest technologies |
| 04 | BFSI, consulting | financially healthy | very good reputation | uses latest technologies |
| 05 | energy & infrastructure | financially healthy | very good reputation | uses latest technologies |
| 06 | manufacturing - non-machinery | financially healthy | very good reputation | uses latest technologies |
| 07 | pharmaceuticals & biotechnology | financially healthy | very good reputation | uses latest technologies |
| 08 | services | uses latest technologies | very good reputation | financially healthy |
| 09 | HR | very good reputation | uses latest technologies | career progression |

top



employers.

top employers in india.

top 10 employers 2019

- 01 Amazon
 - 02 Microsoft
 - 03 Sony
 - 04 Mercedes-Benz
 - 05 IBM
 - 06 Larsen & Toubro
 - 07 Nestle India
 - 08 Infosys Technologies
 - 09 Samsung India
 - 10 Dell Technologies Ltd
-

top 10 employers 2018

- 01 Microsoft
 - 02 Amazon
 - 03 Mercedes-Benz
 - 04 IBM
 - 05 Infosys Technologies
 - 06 ITC Group
 - 07 Samsung India
 - 08 Hindustan Unilever
 - 09 Sony
 - 10 Larsen & Toubro
-

india's top companies

top 3 EVP drivers of the top 5 companies.

| | top 3 EVP drivers | | |
|-----------------|--------------------------|--------------------------|--------------------------|
| top 5 companies | 1 | 2 | 3 |
| 1 Amazon | financially healthy | uses latest technologies | very good reputation |
| 2 Microsoft | financially healthy | very good reputation | uses latest technologies |
| 3 Sony | financially healthy | uses latest technologies | very good reputation |
| 4 Mercedes-Benz | financially healthy | very good reputation | uses latest technologies |
| 5 IBM | uses latest technologies | financially healthy | very good reputation |

top employers by EVP driver.

| EVP driver | 1 | 2 | 3 |
|------------------------------|---------------------|---------------|---------------------------|
| attractive salary & benefits | Microsoft | Amazon | Mercedes-Benz |
| career progression | Microsoft | Amazon | IBM |
| financially healthy | Microsoft | Amazon | Reliance Industries |
| gives back to society | Microsoft | Tata Steel | Tata Motors |
| interesting job content | Microsoft | Amazon | Tata Consultancy Services |
| job security | State Bank of India | ONGC | Microsoft |
| pleasant work atmosphere | Microsoft | Amazon | Tata Steel |
| uses latest technologies | Microsoft | Amazon | Samsung India |
| very good reputation | Microsoft | Mercedes-Benz | Amazon |
| work-life balance | Microsoft | Tata Steel | State Bank of India |

deep dive

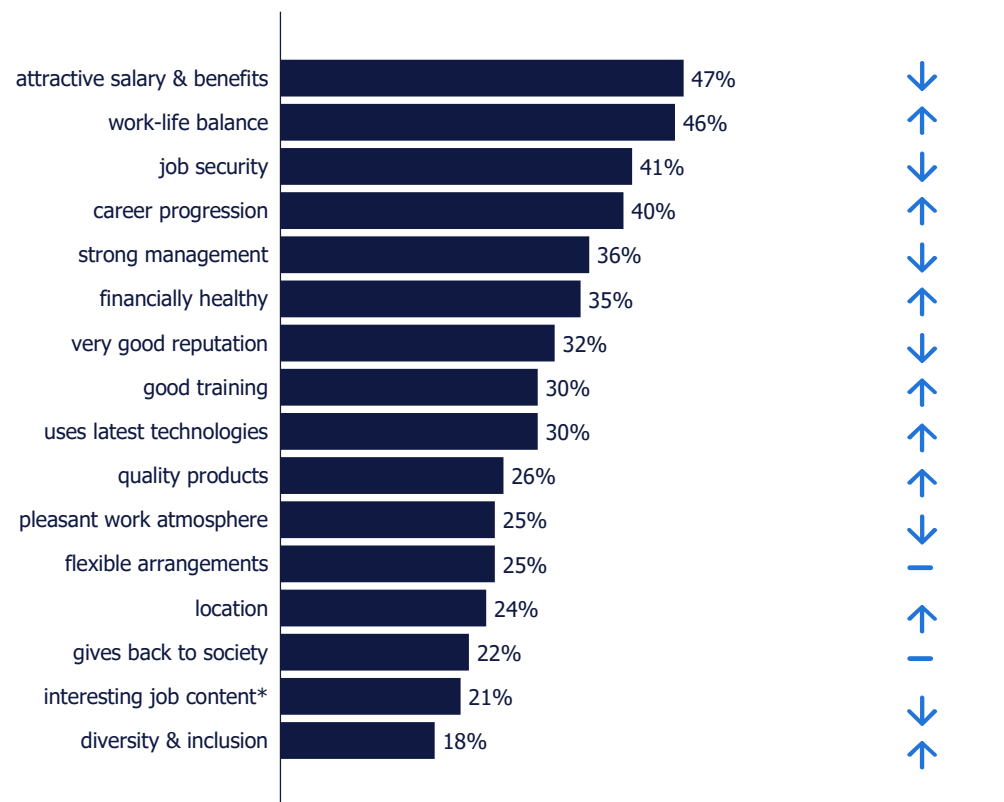
appendix 1.



what potential employees want

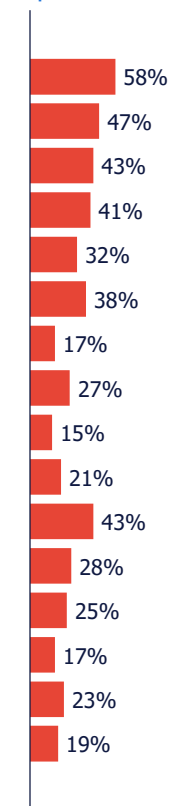
the most important criteria when choosing an employer.

important criteria

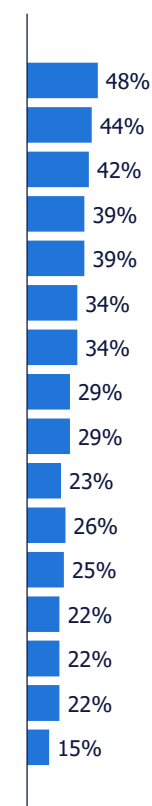


Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.

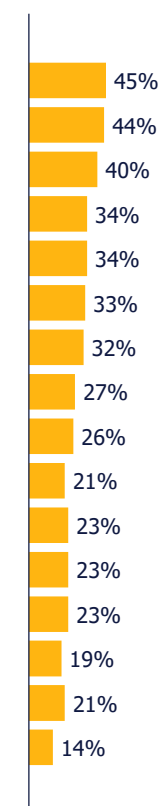
apac



2018

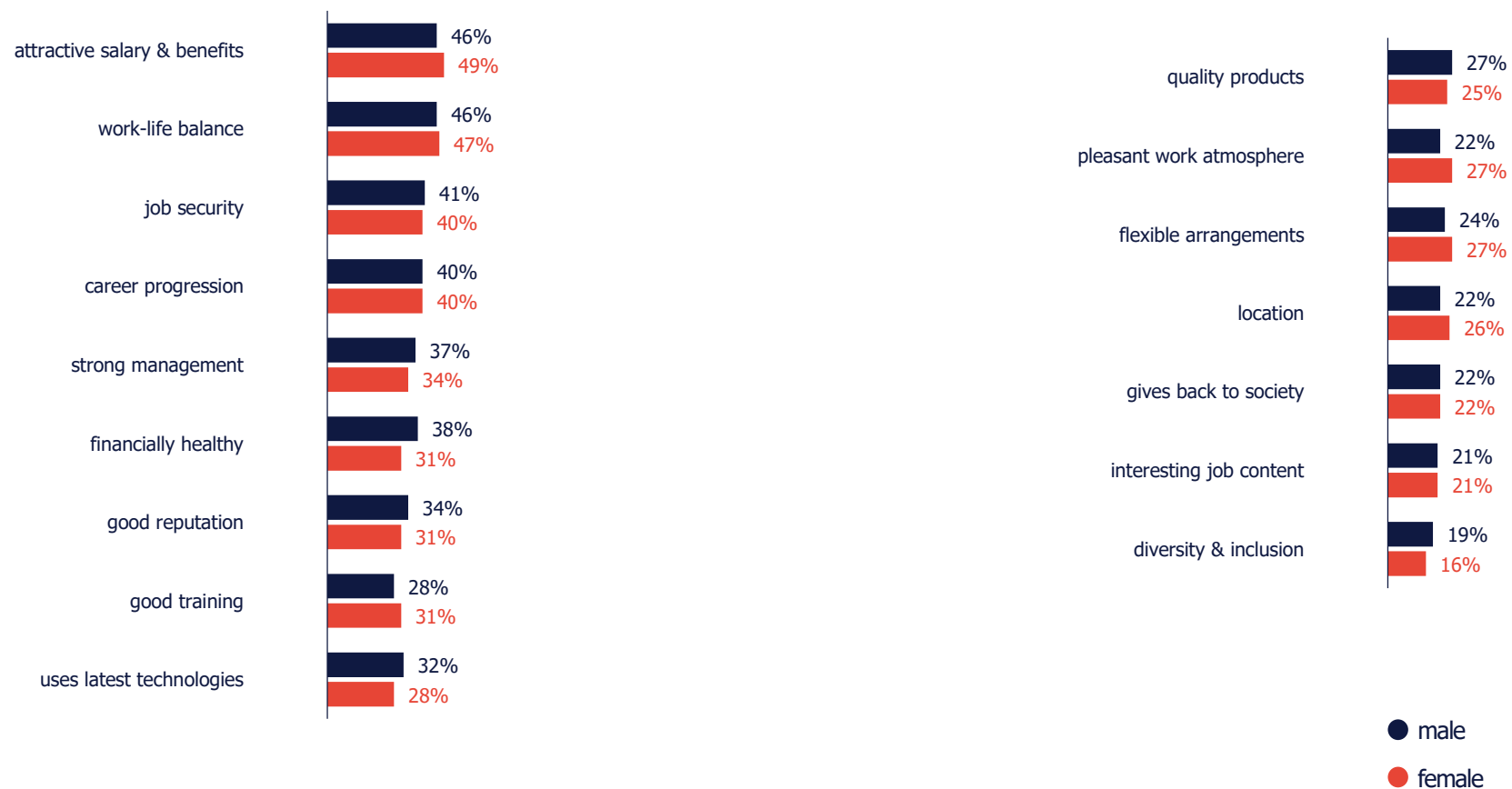


2017

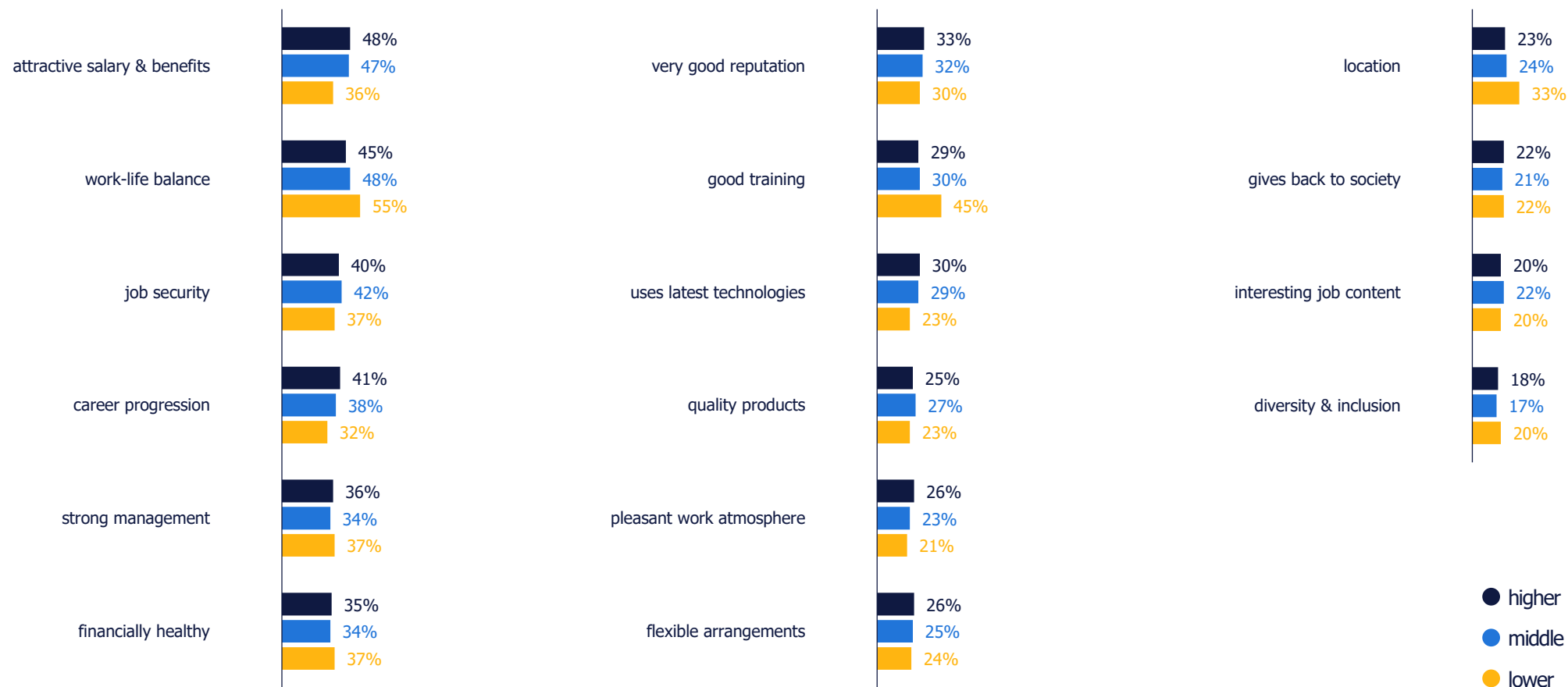


*2017: work that is stimulating and challenging

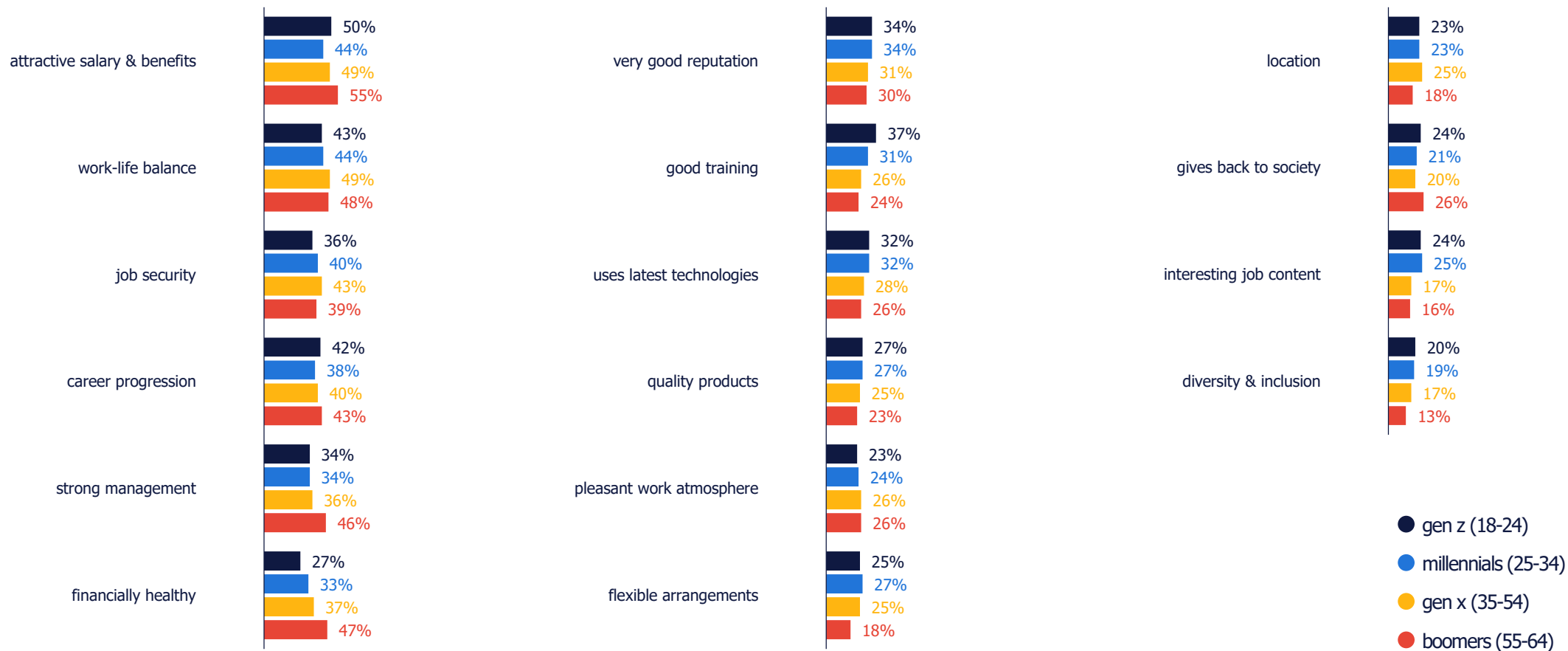
EVP driver importance by gender.



EVP driver importance by education.



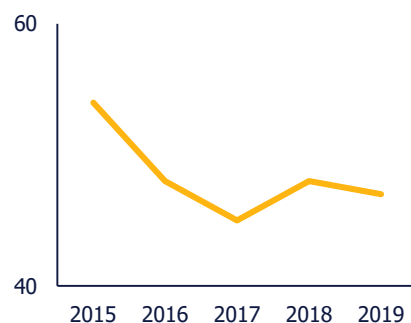
EVP driver importance by age.



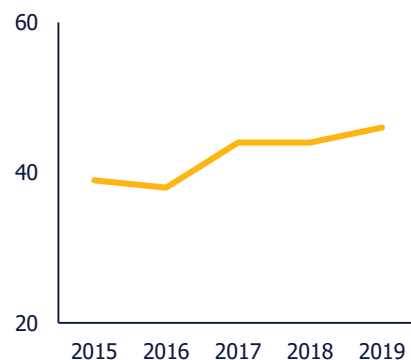
EVP driver importance trends, total.

1/2

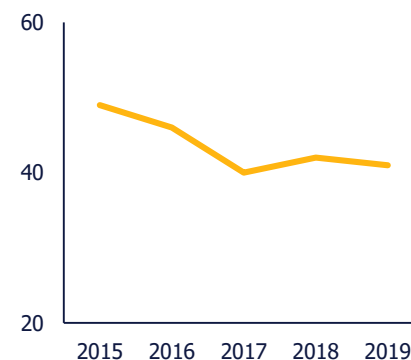
attractive salary & benefits



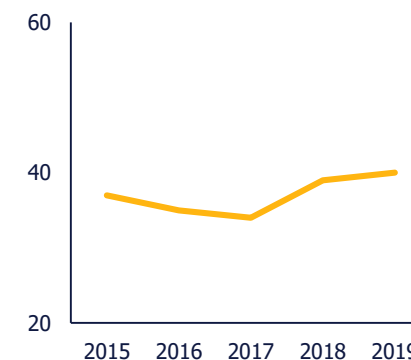
work-life balance



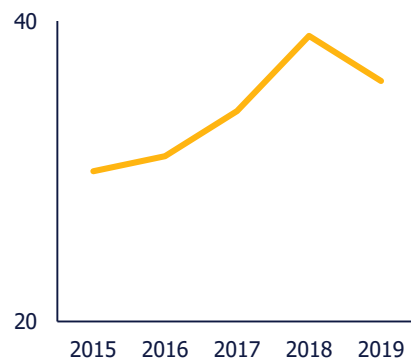
job security



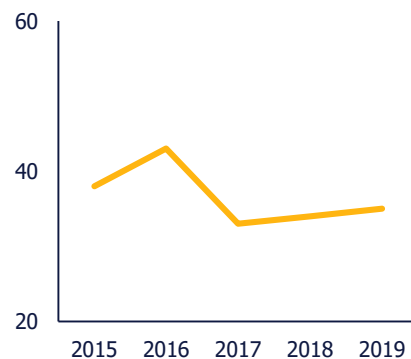
career progression



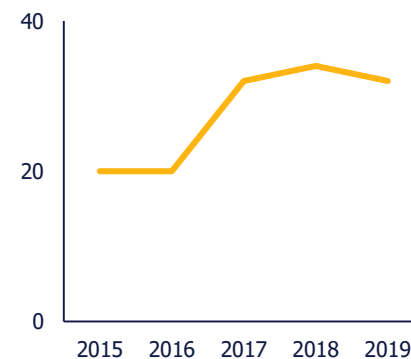
strong management



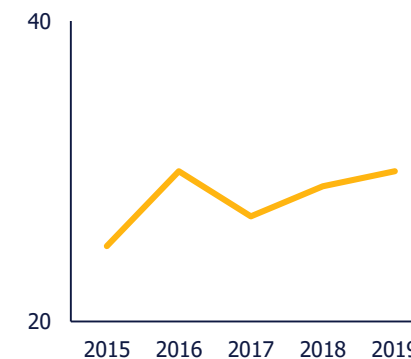
financially healthy



very good reputation*



good training



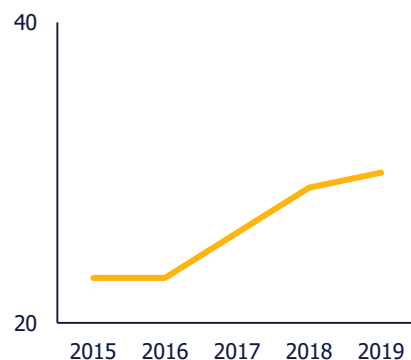
*previous to 2017: strong image/strong values



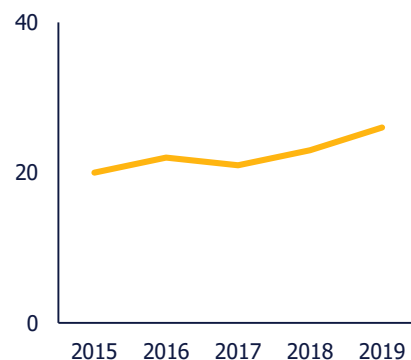
EVP driver importance trends, total.

2/2

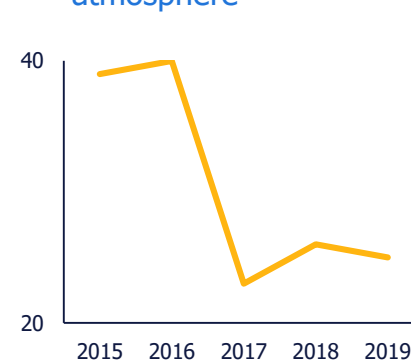
uses latest technologies



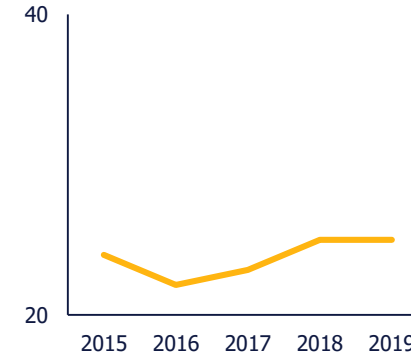
quality products



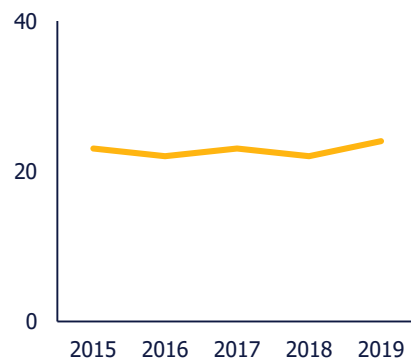
pleasant work atmosphere



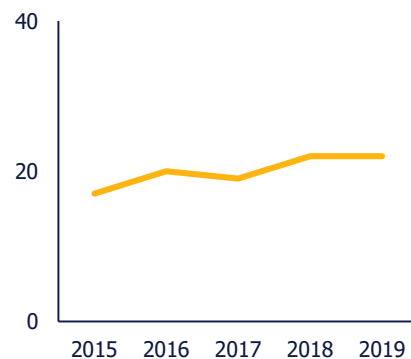
flexible arrangements



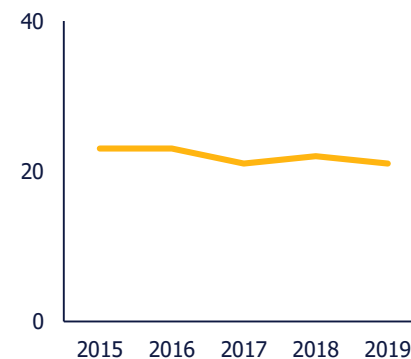
location



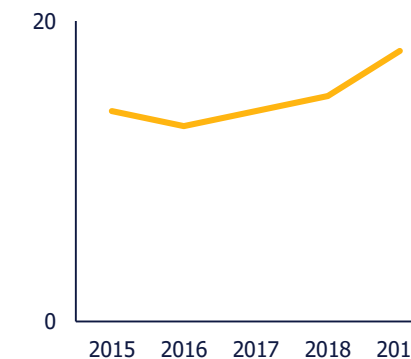
gives back to society



interesting job content*



diversity & inclusion

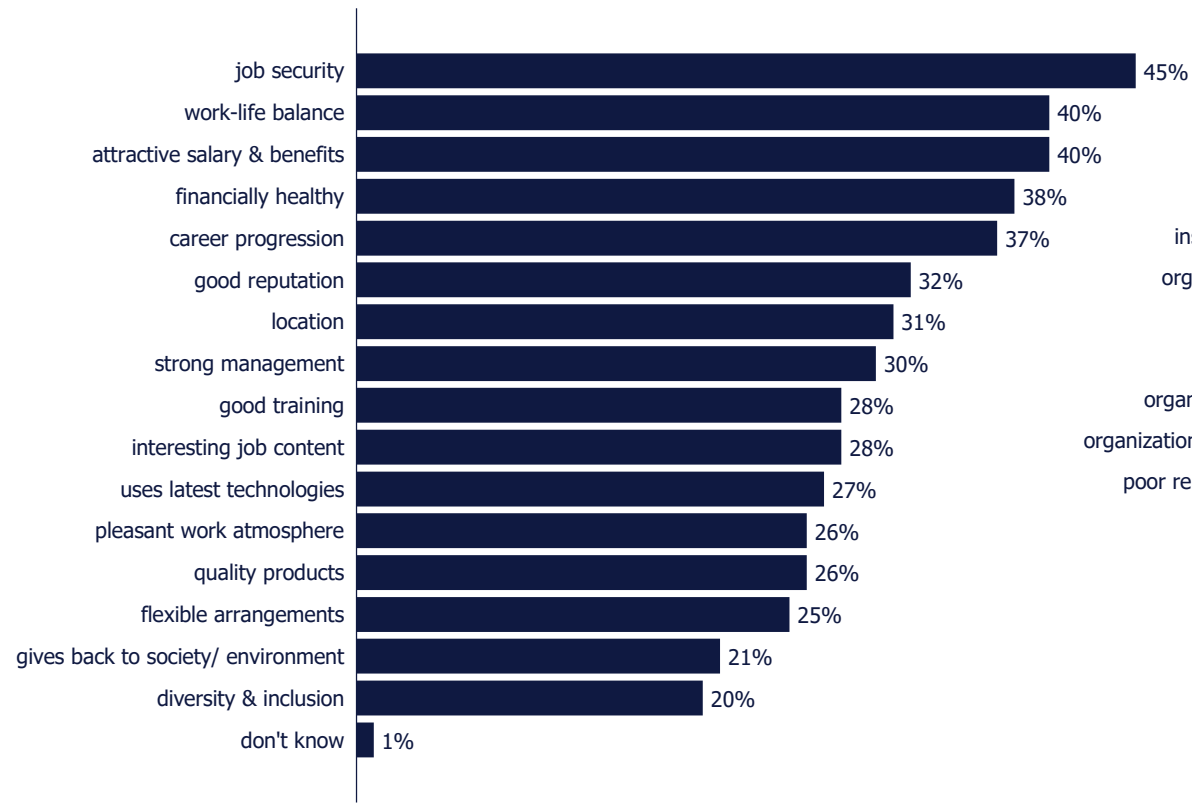


*2017: work that is stimulating and challenging

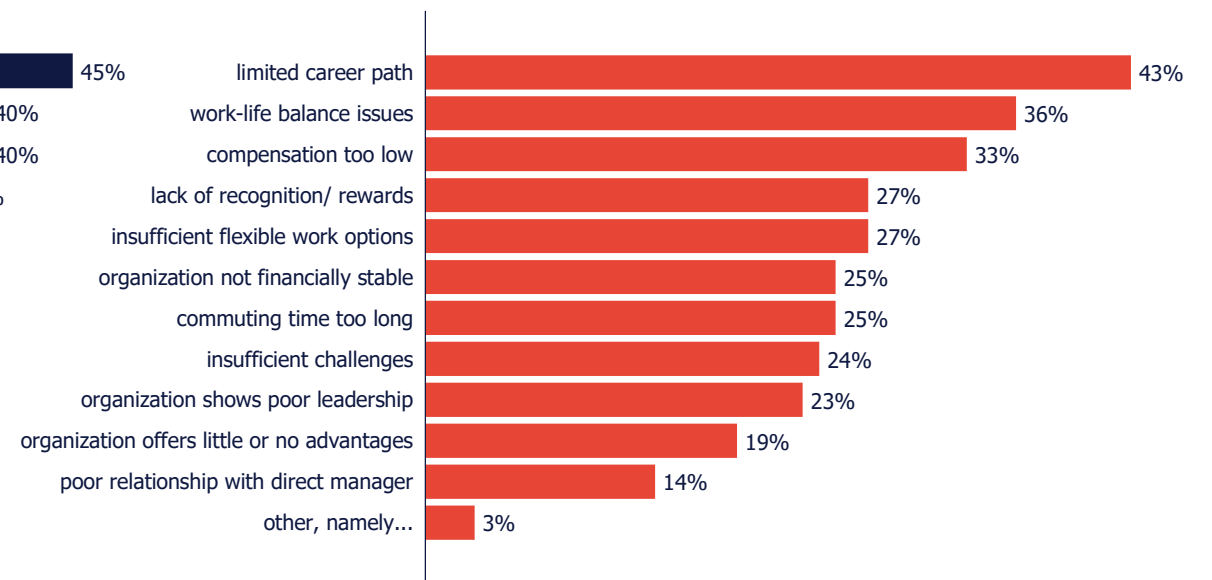


what factors do the indians stay or leave for.

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.

