

employer
brand research
2019



country report
russia.

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

- 14.082 respondents

fieldwork

- online interviews
- between 11 and 23 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.

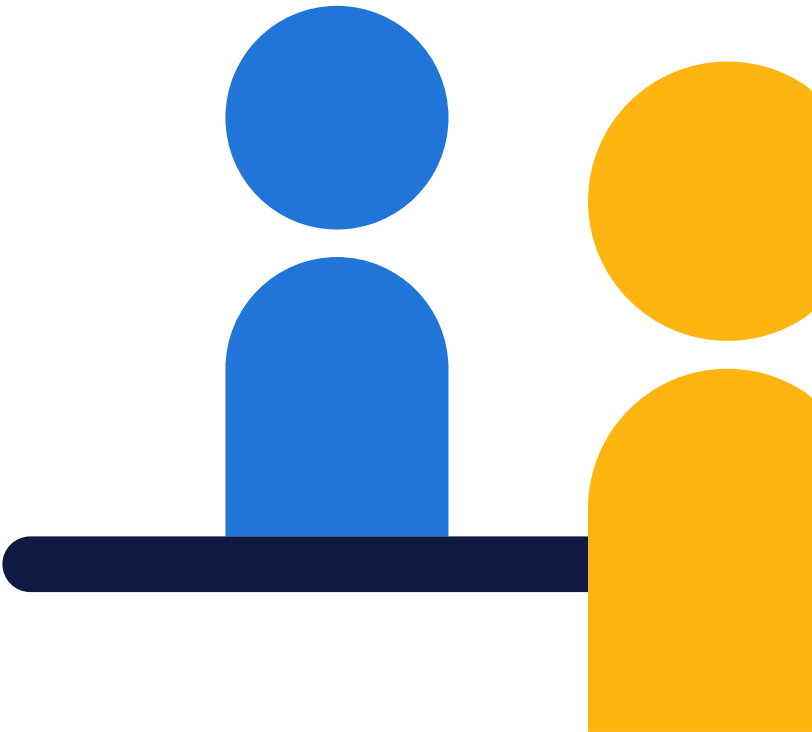
In order to make sure that the less well known brands are assessed by a sufficient number of respondents, we make use of a smart sampling method.

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.



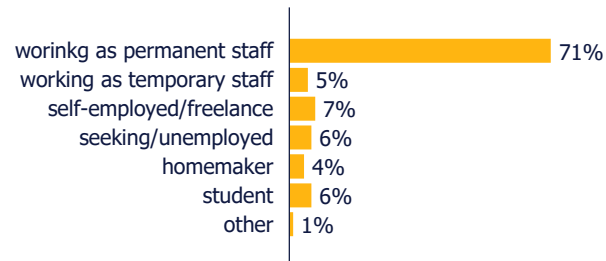
sample composition in russia

socio-demographics, employment situation, region.

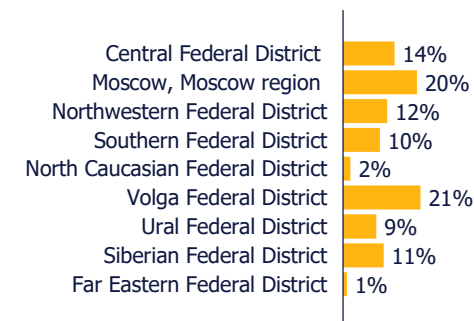
gender



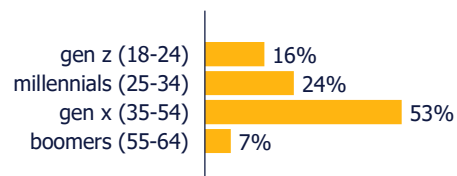
situation



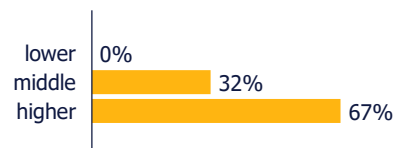
region



age



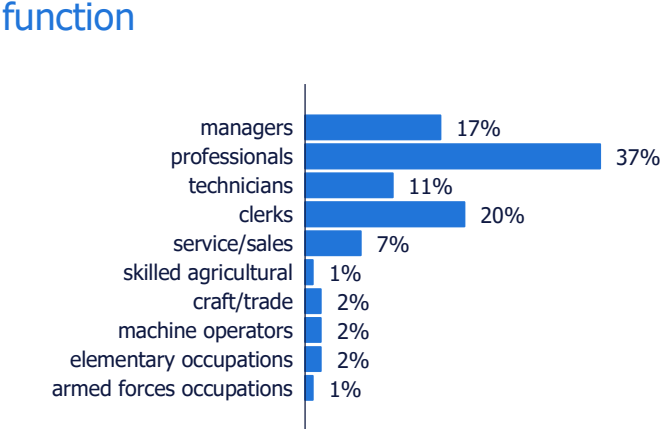
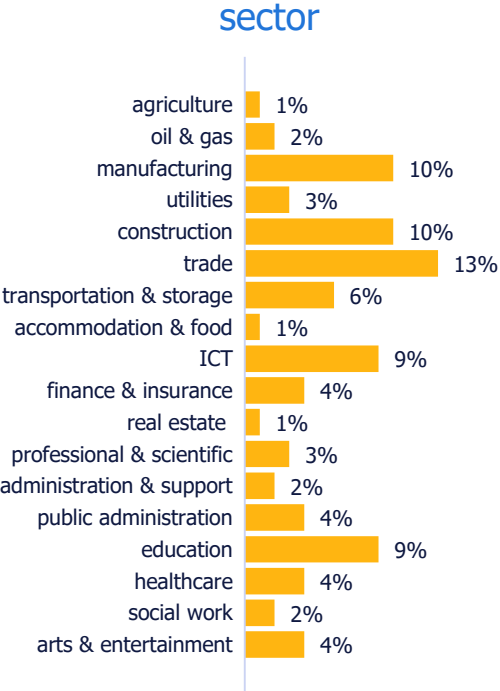
education



total sample: 14.082
fieldwork: 11 and 23 january 2019



sample composition in russia

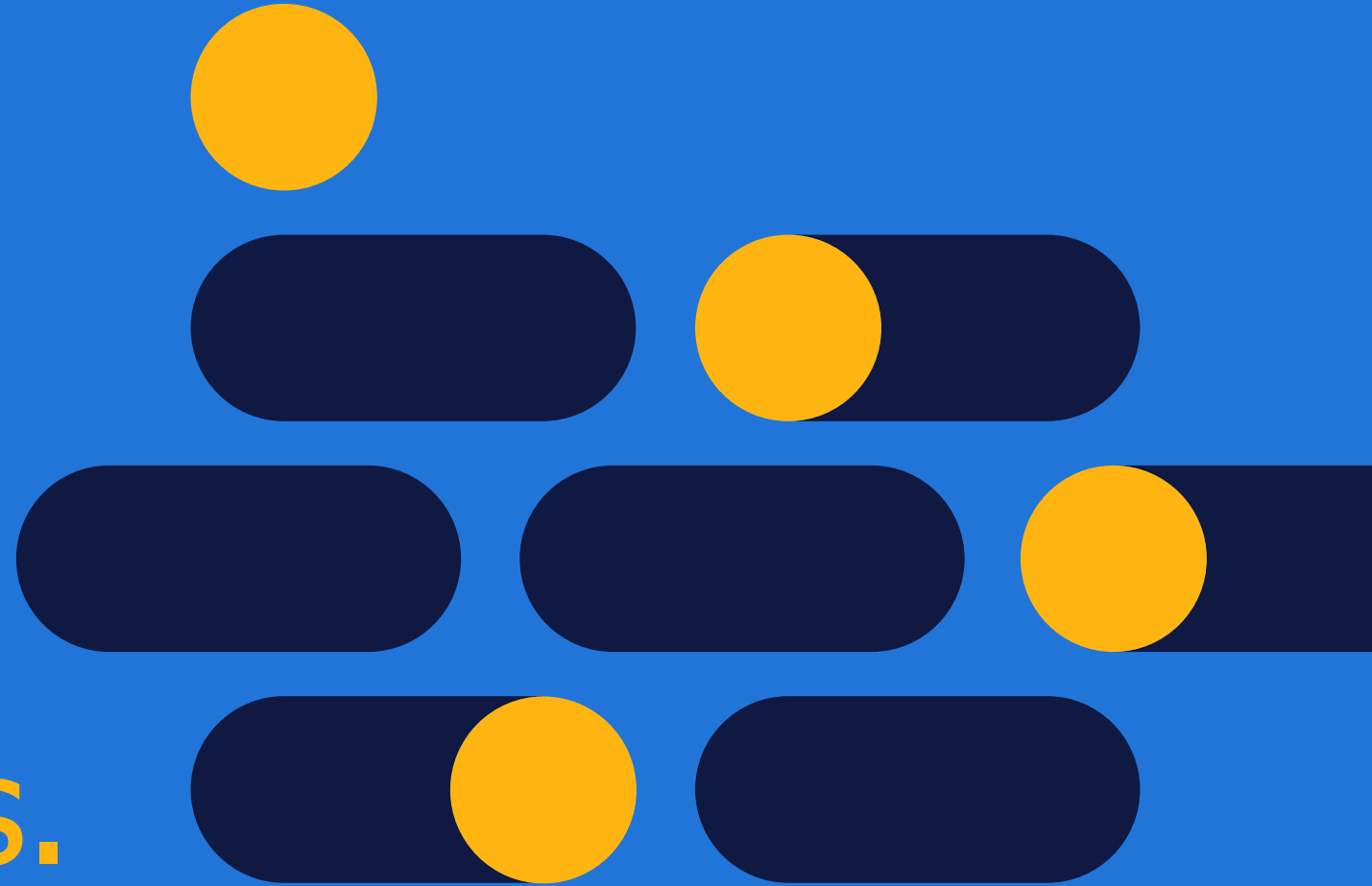


base: currently employed (n=11.695)



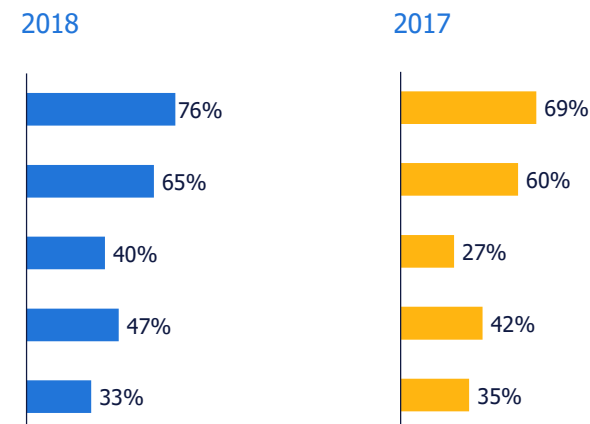
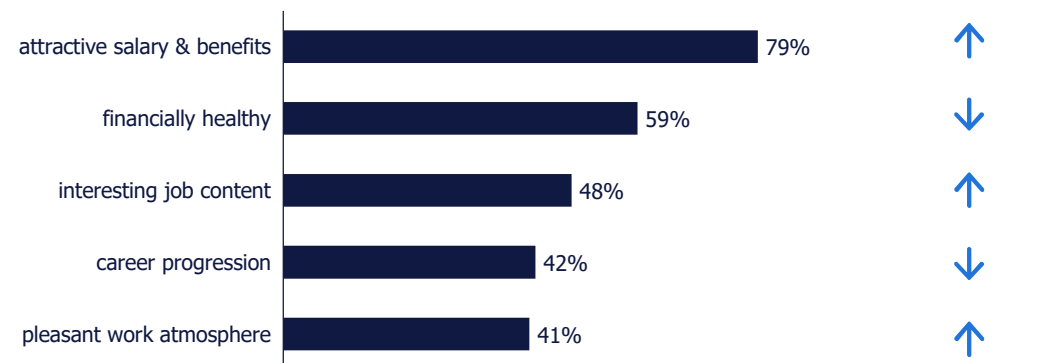
country

EVP drivers.

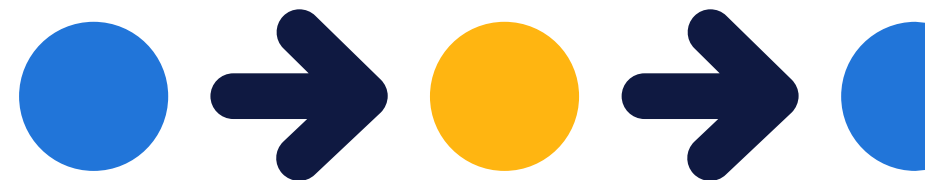


what potential employees want when choosing an employer.

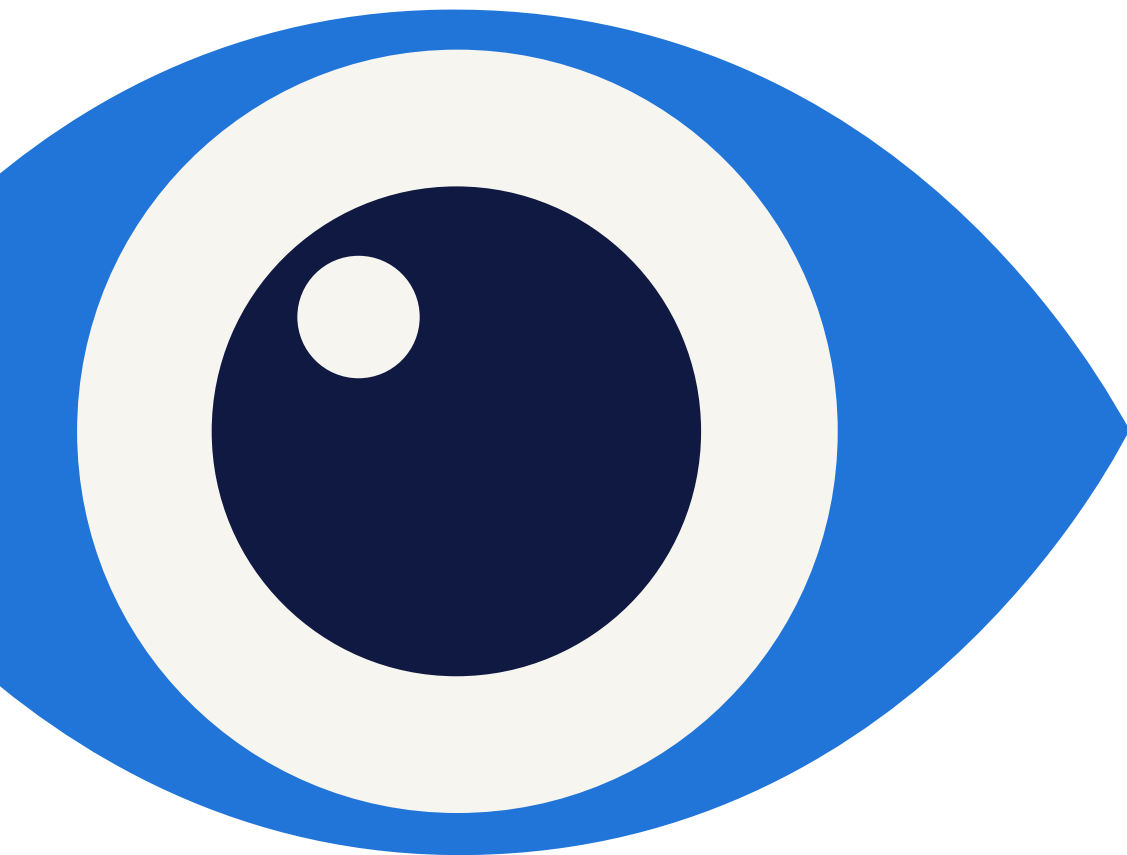
most important criteria



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



perception of employer offer in russia.



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

employees in russia want.

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

employers in russia are perceived to offer.

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

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

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 interesting job content
 - 3 career progression
-



what do potential employees want by generational profile.

gen z (18-24)

56%

of the gen z's are looking for career progression opportunities at their employer. This is higher when compared to older workforce.

gen x (35-54)

82%

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)

43%

of the millennials seek a pleasant work atmosphere. Older generations are less interested in this offering from their employer.

boomers (55-64)

21%

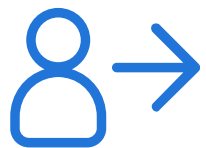
of the boomers are attracted to companies with a strong management. This is less so among the younger cohorts.



[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.

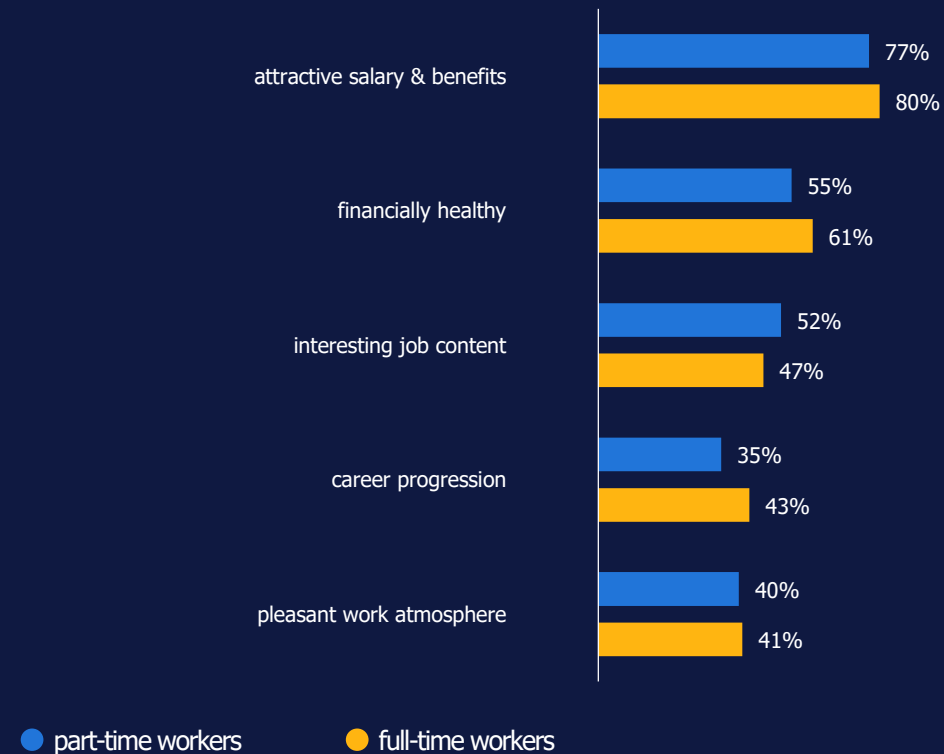


11%

of today's workforce
works part-time.

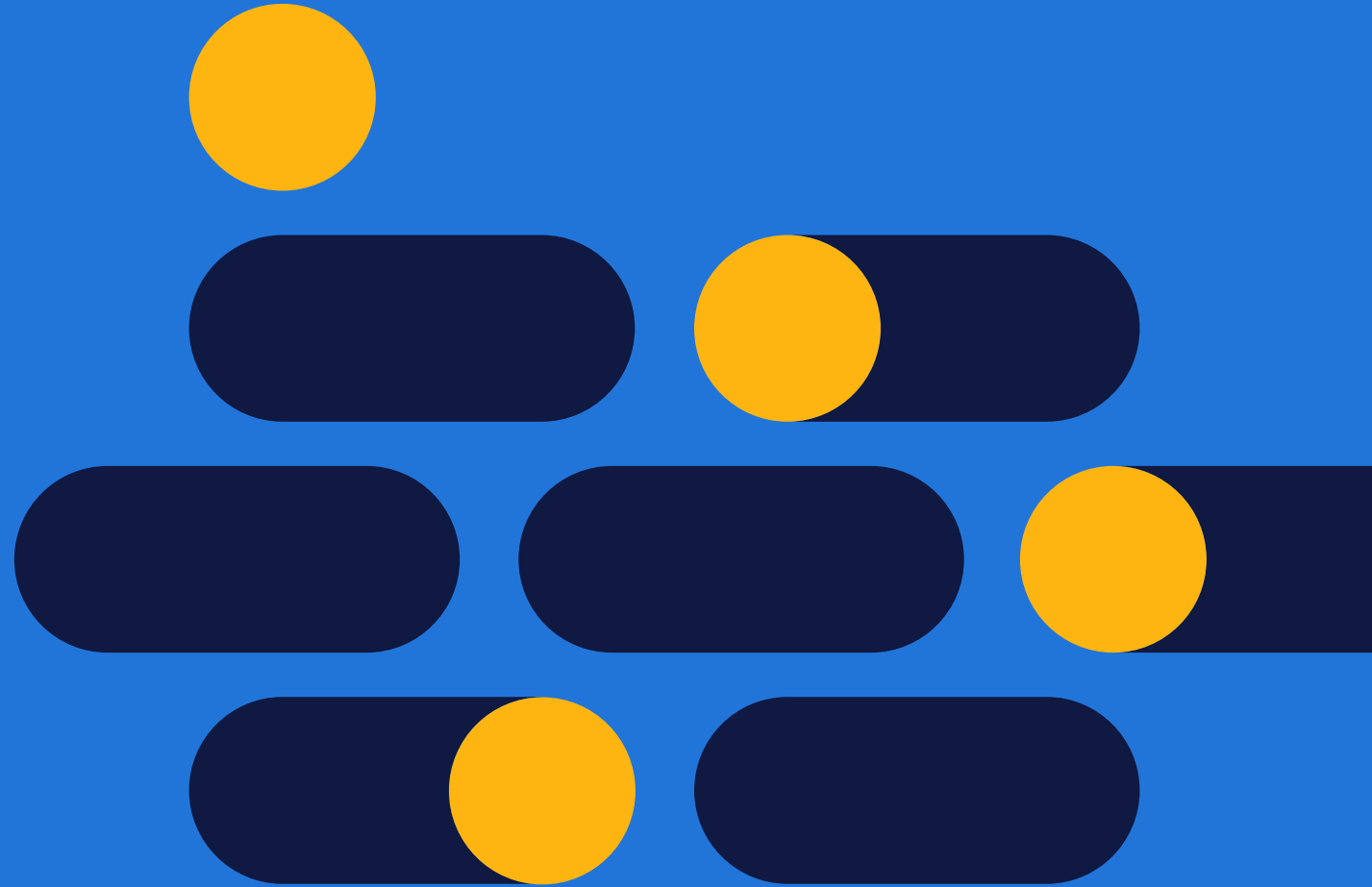


most important attributes

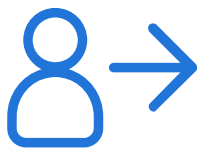


switchers and stayers

in focus.



most important attributes switchers vs stayers.



23% (23%)*

switchers: changed
employer in
the past year.



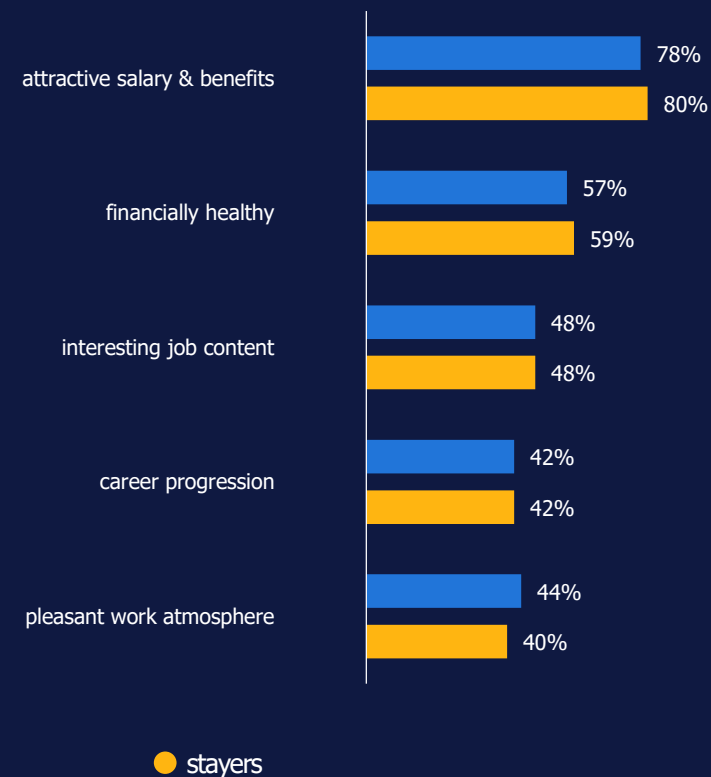
77% (77%)*

stayers: stayed with their
employer in the past year.

*in 2018

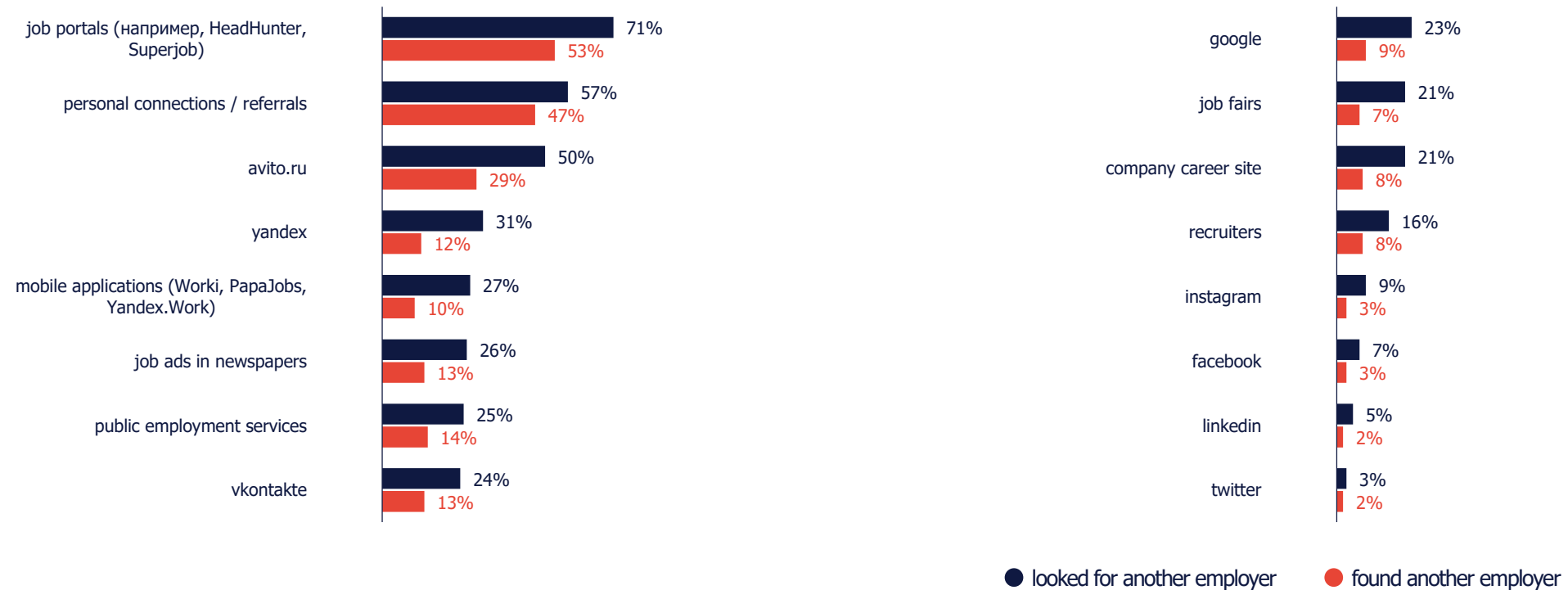


most important attributes



how do the russians workers look for and find employers.

channels used to look for and find employers



most important attributes intenders.



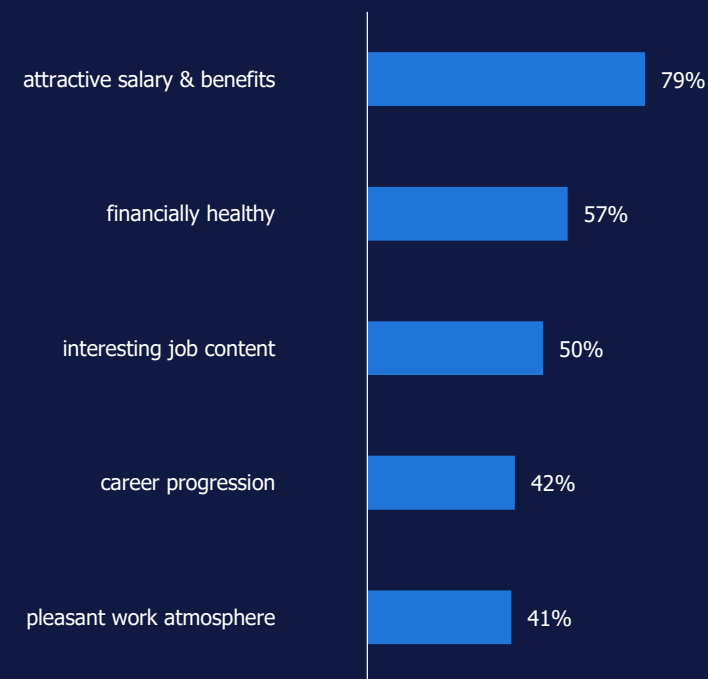
35% (35)*

intenders: plan to
change employer
within the next year.

*in 2018

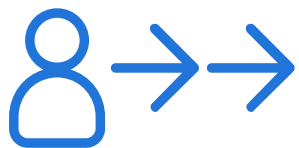


most important attributes



● intenders

channels to look for employers intenders.



51% (49%)*

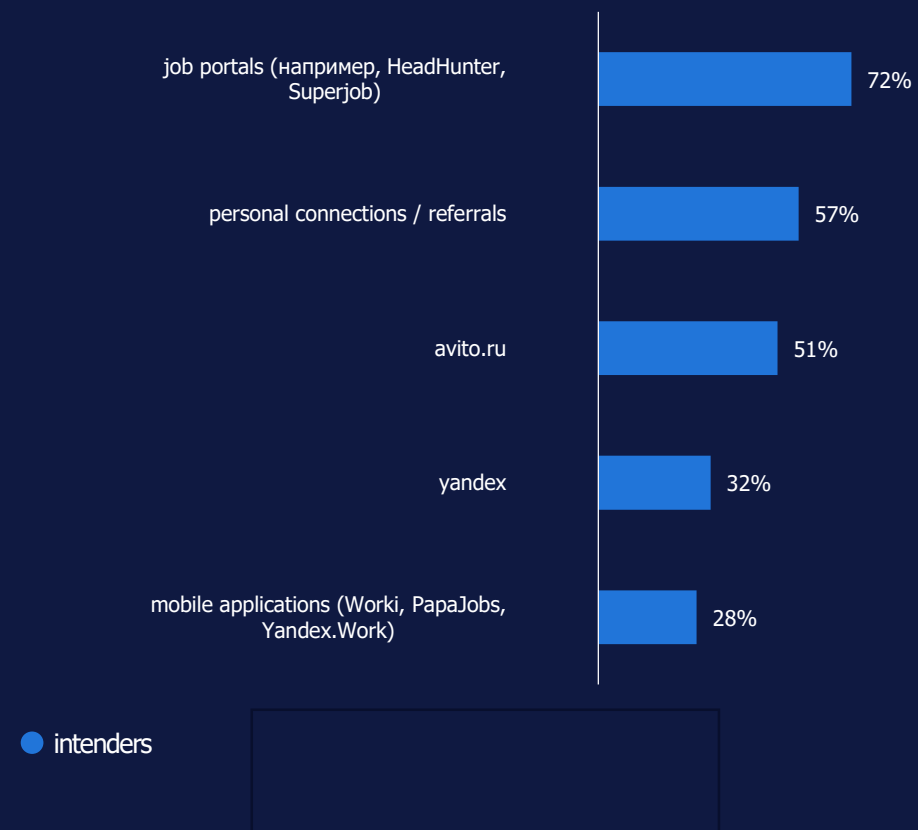
of last year's switchers**
intend to switch again
next year.

**n=3.216 switched last year

*in 2018



channels to look for employers

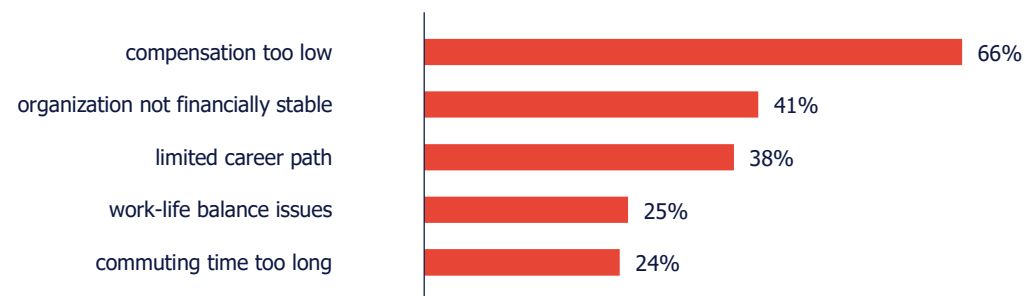


why do russians stay or leave.

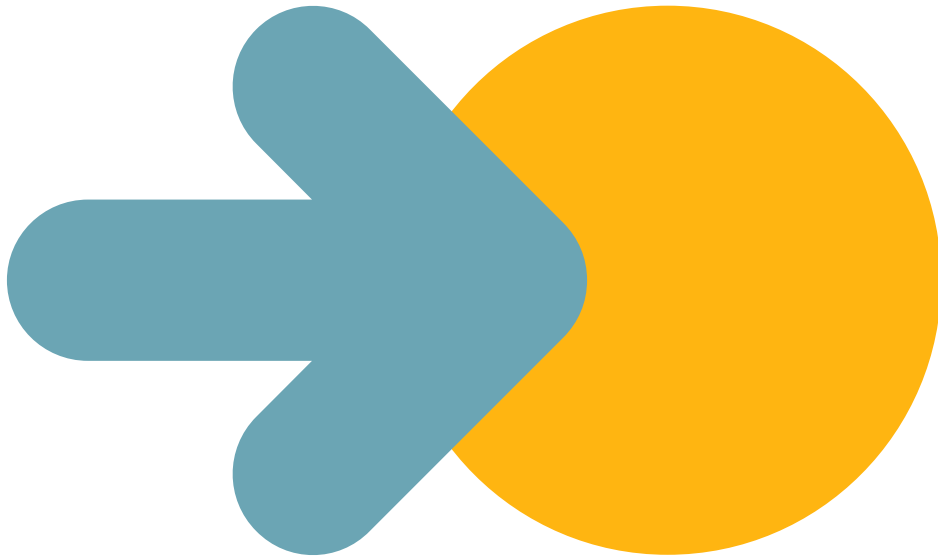
main reasons to stay



main reasons to leave



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



gen z (18-24)

45%

of the gen z's are staying with their employer for a career progression opportunities. This is higher when compared to gen x and boomers.

gen x (35-54)

52%

of the gen x's stay with their employer if they are financially healthy. Among younger generations, this factor is deemed less important.

millennials (25-34)

74%

of the millennials stay if they have attractive salary & benefits. Gen z is less interested in this offering from their employer.

boomers (55-64)

55%

of the boomers are more likely to stay with their employer if they have an interesting job content. This is less so among millennials and gen x.

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

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

gen z (18-24)

27%

of the gen z's are leaving their employer if they don't have sufficient challenges at work. This is higher when compared to millennials and gen x.

gen x (35-54)

44%

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

millennials (25-34)

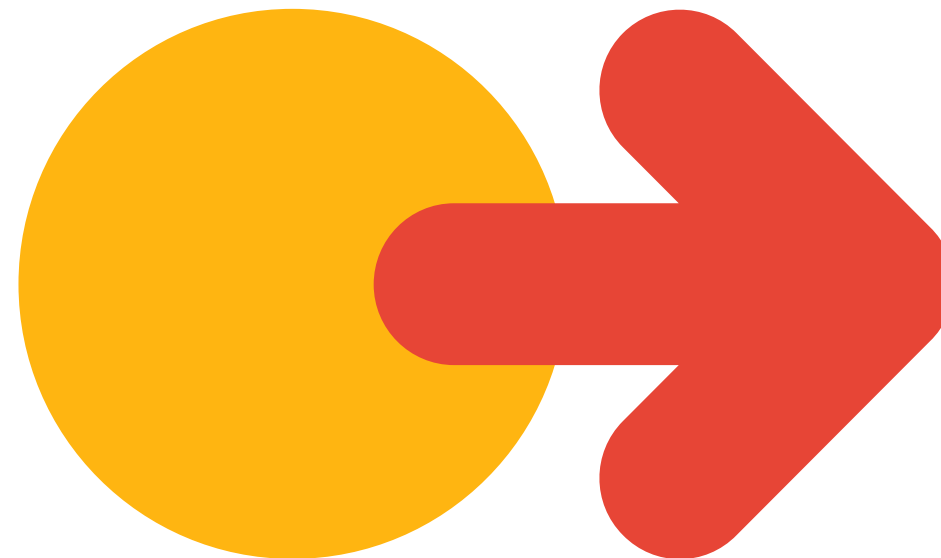
48%

of the millennials leave if they lack career opportunities. Other generations are less interested in this offering from their employer.

boomers (55-64)

23%

of the boomers are more likely to leave their employer if they lack strong management. This is less so among the other cohorts.

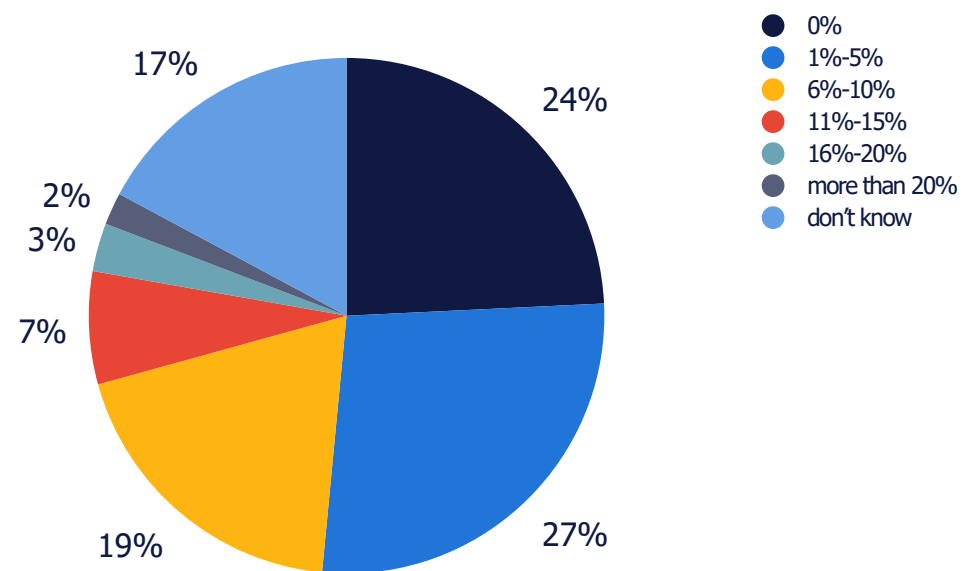


[click here](#) for a breakdown of all results.



willingness to forfeit salary for more work security.

amount of salary employees are willing to forfeit



russia

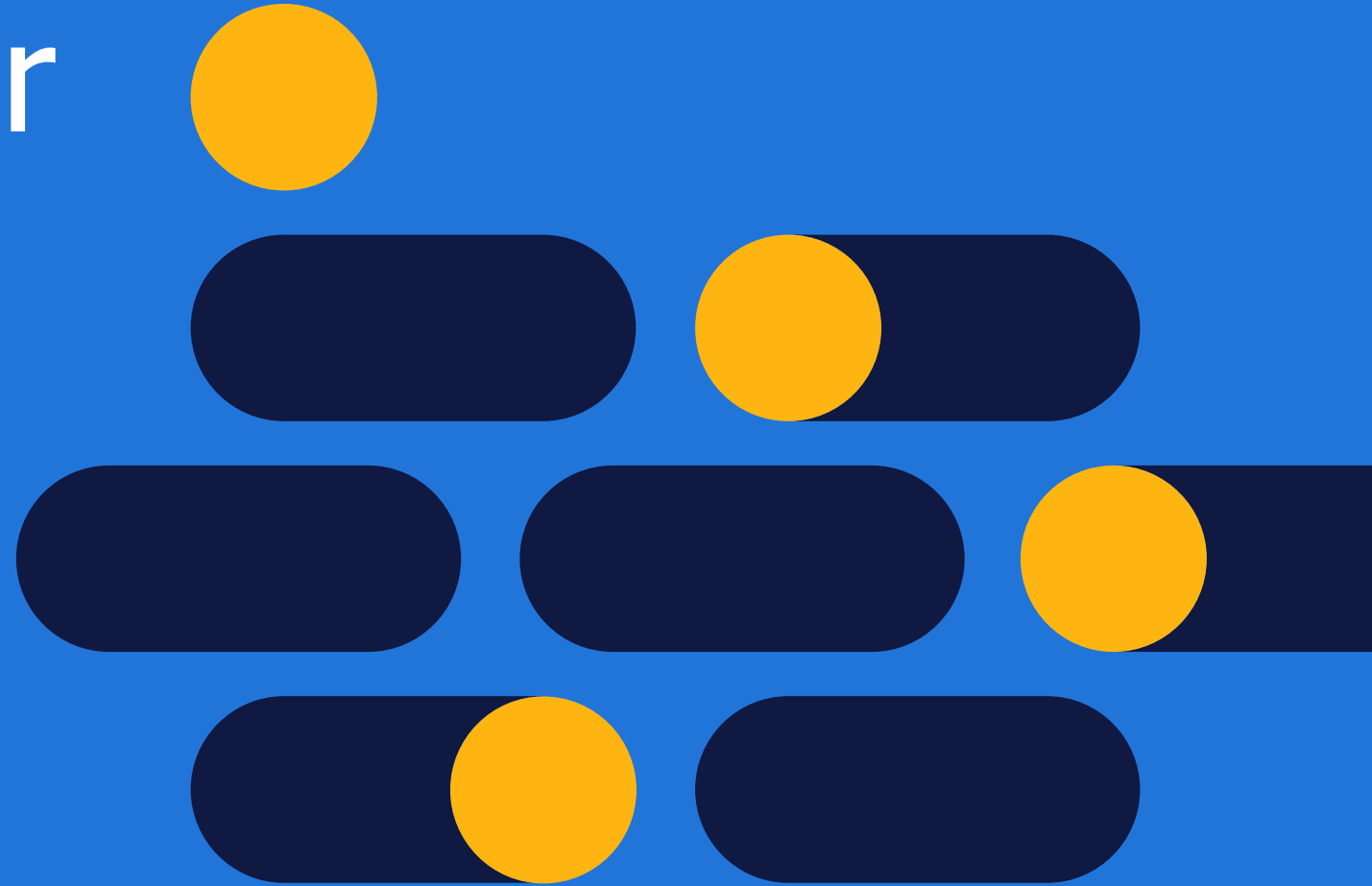
12%

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



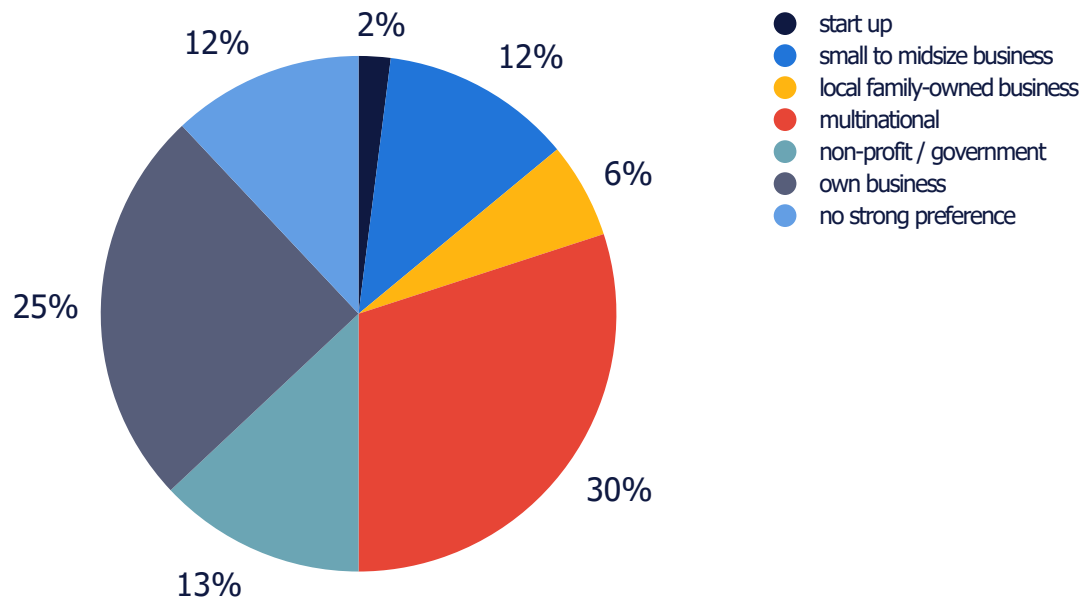
ideal employer

in focus.



30% of the russians prefer to work for large (multinational) corporation.

preferred company type



gen z (18-24)

29%

would rather have their own business

gen x (35-54)

13%

would prefer to work for a small to mid-size business

millennials (25-34)

33%

would prefer to work for a large (multinational) corporation

boomers (55-64)

19%

would prefer to work for non-profit / government

company type preference

reasons why.

large corporation (30%)

financial health

career progression

job security

own business (25%)

interesting job content

work-life balance

diversity & inclusion

non-profit / government (13%)

job security

financial health

gives back to society

small to midsize business (12%)

interesting job content

pleasant work atmosphere

work-life balance

local family-owned business (6%)

interesting job content

pleasant work atmosphere

work-life balance

start-up (2%)

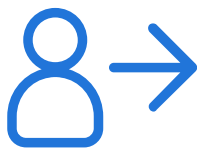
interesting job content

career progression

strong management



company type preference switchers vs stayers.



29%

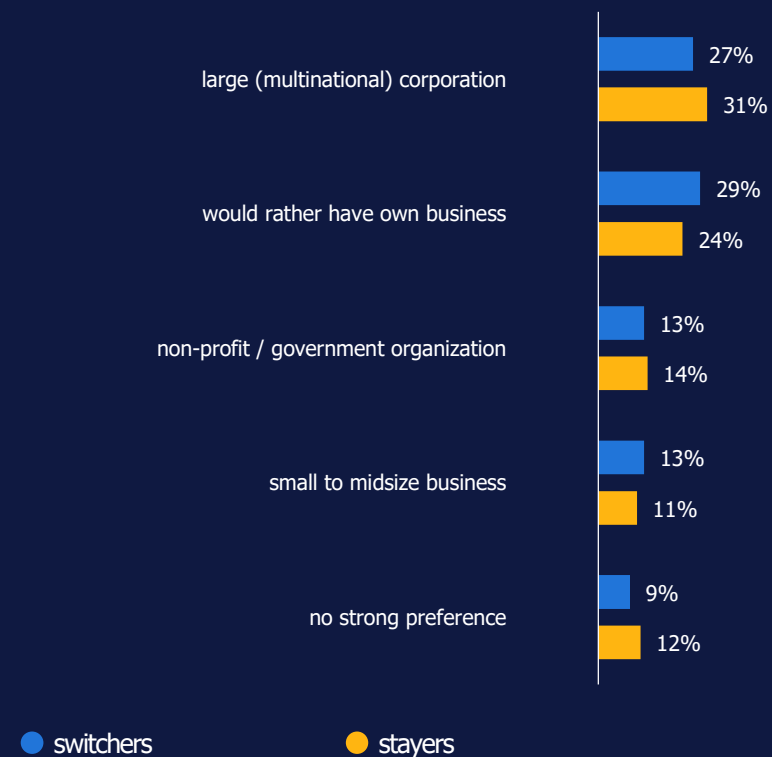
of the switchers prefer
to rather have their own
business.



31%

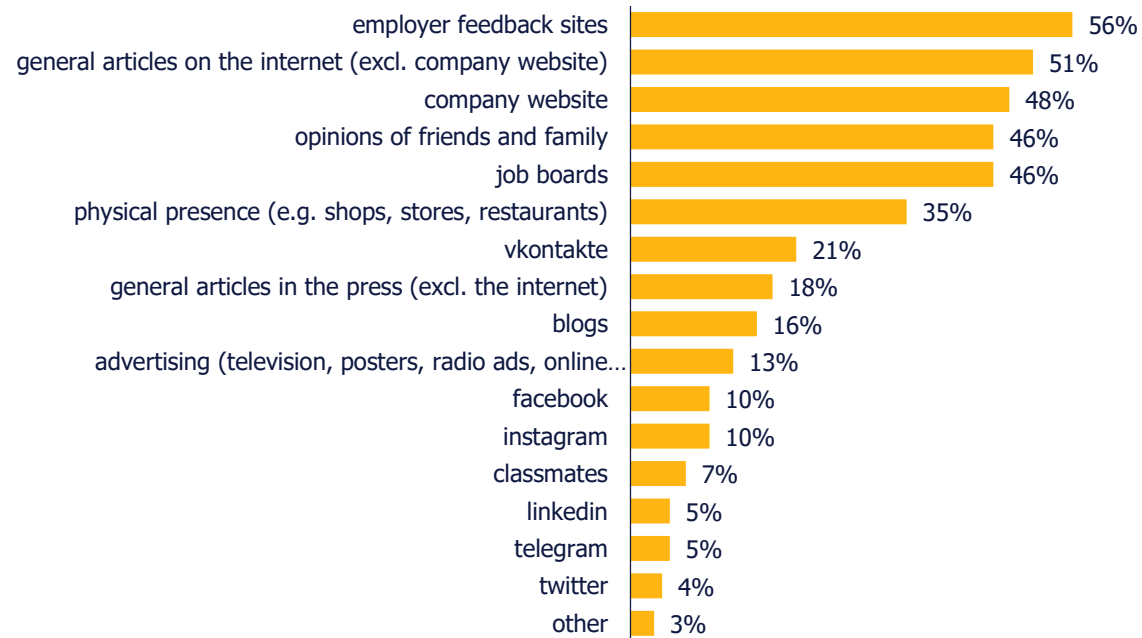
of the stayers prefer to
work for a large
(multinational)
corporation.

company type preference



93% of the russians check potential employer's reputation.

channels for reputation check



most often used

gen z (18-24)

36%

vkontakte

gen x (35-54)

57%

employer feedback sites

millennials (25-34)

49%

job boards

boomers (55-64)

52%

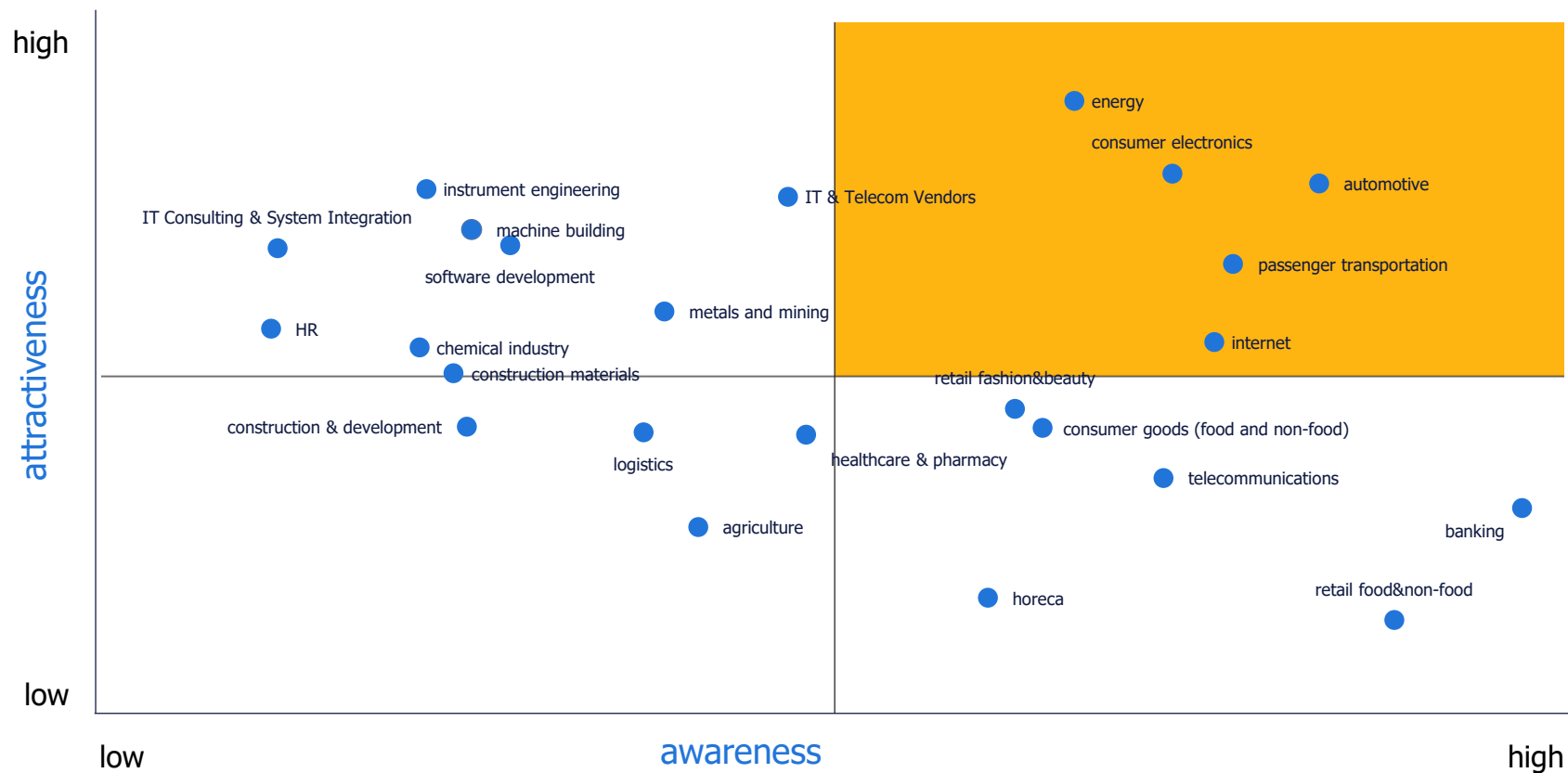
opinions of friends and family

sector



insights.

top performing sectors in russia 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.

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

1/3

sector	top 3 EVP drivers		
	1	2	3
01 energy	financially healthy	uses latest technologies	job security
02 consumer electronics	uses latest technologies	financially healthy	very good reputation
03 automotive	financially healthy	uses latest technologies	very good reputation
04 instrument engineering	uses latest technologies	financially healthy	very good reputation
05 IT & Telecom Vendors	uses latest technologies	financially healthy	very good reputation
06 machine building	uses latest technologies	financially healthy	very good reputation
07 software development	uses latest technologies	financially healthy	very good reputation
08 IT Consulting & System Integration	uses latest technologies	financially healthy	interesting job content
09 passenger transportation	financially healthy	uses latest technologies	very good reputation
10 metals and mining	financially healthy	job security	very good reputation

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

2/3

sector	top 3 EVP drivers		
	1	2	3
11 HR	uses latest technologies	very good reputation	career progression
12 internet	uses latest technologies	financially healthy	very good reputation
13 chemical industry	financially healthy	very good reputation	uses latest technologies
14 construction materials	uses latest technologies	financially healthy	very good reputation
15 retail fashion & beauty	financially healthy	very good reputation	uses latest technologies
16 construction & development	uses latest technologies	financially healthy	very good reputation
17 consumer goods (food and non-food)	financially healthy	very good reputation	uses latest technologies
18 logistics	financially healthy	very good reputation	uses latest technologies
19 healthcare & pharmacy	financially healthy	uses latest technologies	very good reputation
20 telecommunications	uses latest technologies	financially healthy	career progression

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

3/3

	top 3 EVP drivers		
sector	1	2	3
21 banking	financially healthy	uses latest technologies	very good reputation
22 agriculture	financially healthy	very good reputation	uses latest technologies
23 horeca	financially healthy	very good reputation	uses latest technologies
24 retail (food & non-food)	financially healthy	very good reputation	career progression

top



employers.

top employers in russia.

top 10 employers 2019

- 01 Gazprom Neft
 - 02 Surgutneftegas
 - 03 Transneft
 - 04 Russneft
 - 05 Rosneft
 - 06 Yandex
 - 07 Tactical Missiles Corporation
 - 08 Roscosmos
 - 09 Tatneft
 - 10 Lukoil
-

top 10 employers 2018

- 01 Gazprom Neft
 - 02 Rosneft
 - 03 Transneft
 - 04 Russneft
 - 05 Yandex
 - 06 Surgutneftegas
 - 07 Roscosmos
 - 08 RusHydro
 - 09 Almaz-Antey
 - 10 Gazprombank
-

russia's top companies

top 3 EVP drivers of the top 5 companies.

	top 3 EVP drivers		
top 5 companies	1	2	3
1 Gazprom Neft	financially healthy	very good reputation	job security
2 Surgutneftegas	financially healthy	job security	attractive salary & benefits
3 Transneft	financially healthy	very good reputation	attractive salary & benefits
4 Russneft	financially healthy	uses latest technologies	attractive salary & benefits
5 Rosneft	financially healthy	very good reputation	job security

top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	Gazprom Neft	Surgutneftegas	Russneft
career progression	Tactical Missiles Corporation	Gazprom Neft	Surgutneftegas
financially healthy	Gazprom Neft	Surgutneftegas	Rosneft
gives back to society	Gazprom Neft	Gazprom Neft	Surgutneftegas
interesting job content	Tactical Missiles Corporation	Roscosmos	Yandex
job security	Tactical Missiles Corporation	Gazprom Neft	Surgutneftegas
pleasant work atmosphere	Yandex	IBS	Sinara-group
uses latest technologies	Yandex	Tactical Missiles Corporation	Rosatom
very good reputation	Gazprom Neft	Yandex	adidas CIS
work-life balance	Yandex	Tactical Missiles Corporation	T+Group (KES Kholding)

deep dive

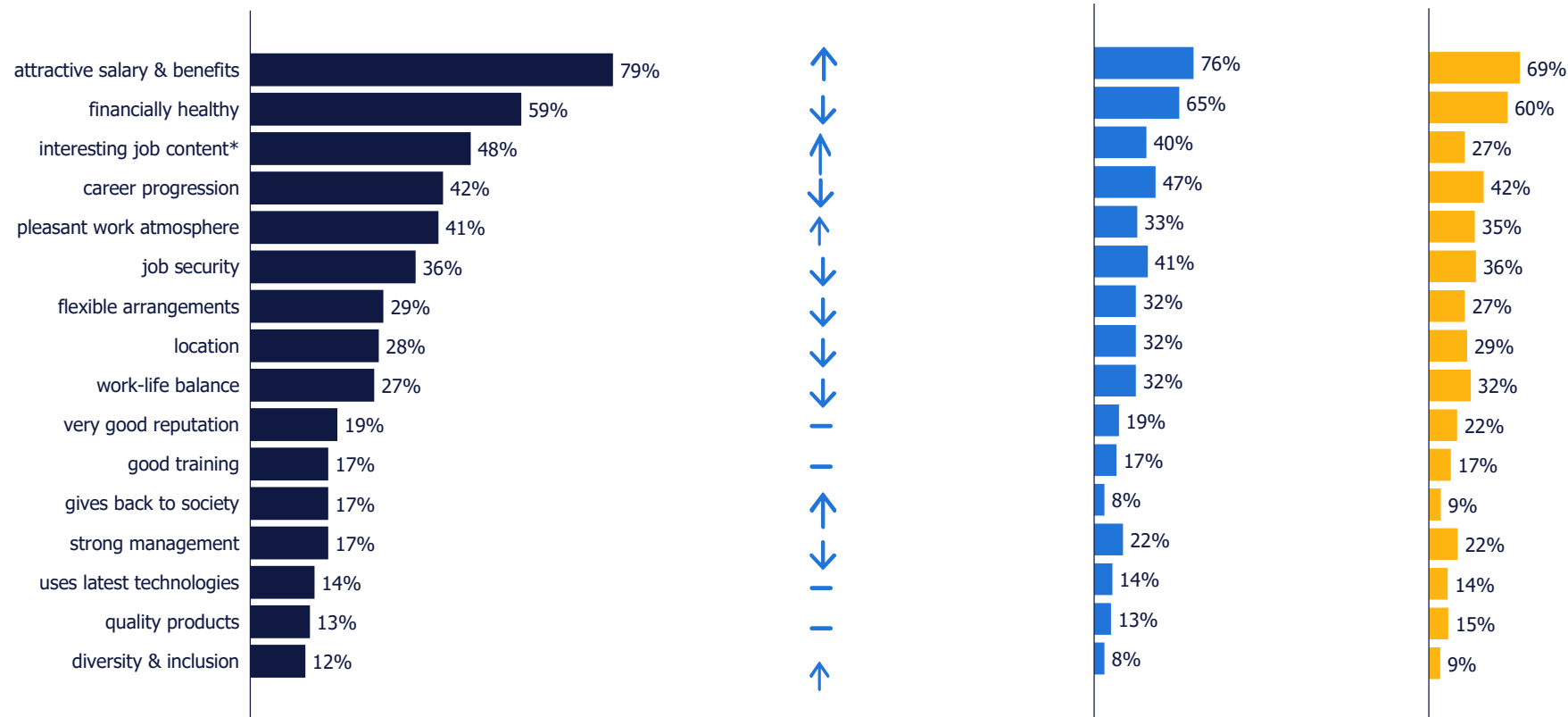
appendix 1.



what potential employees want

the most important criteria when choosing an employer.

important criteria

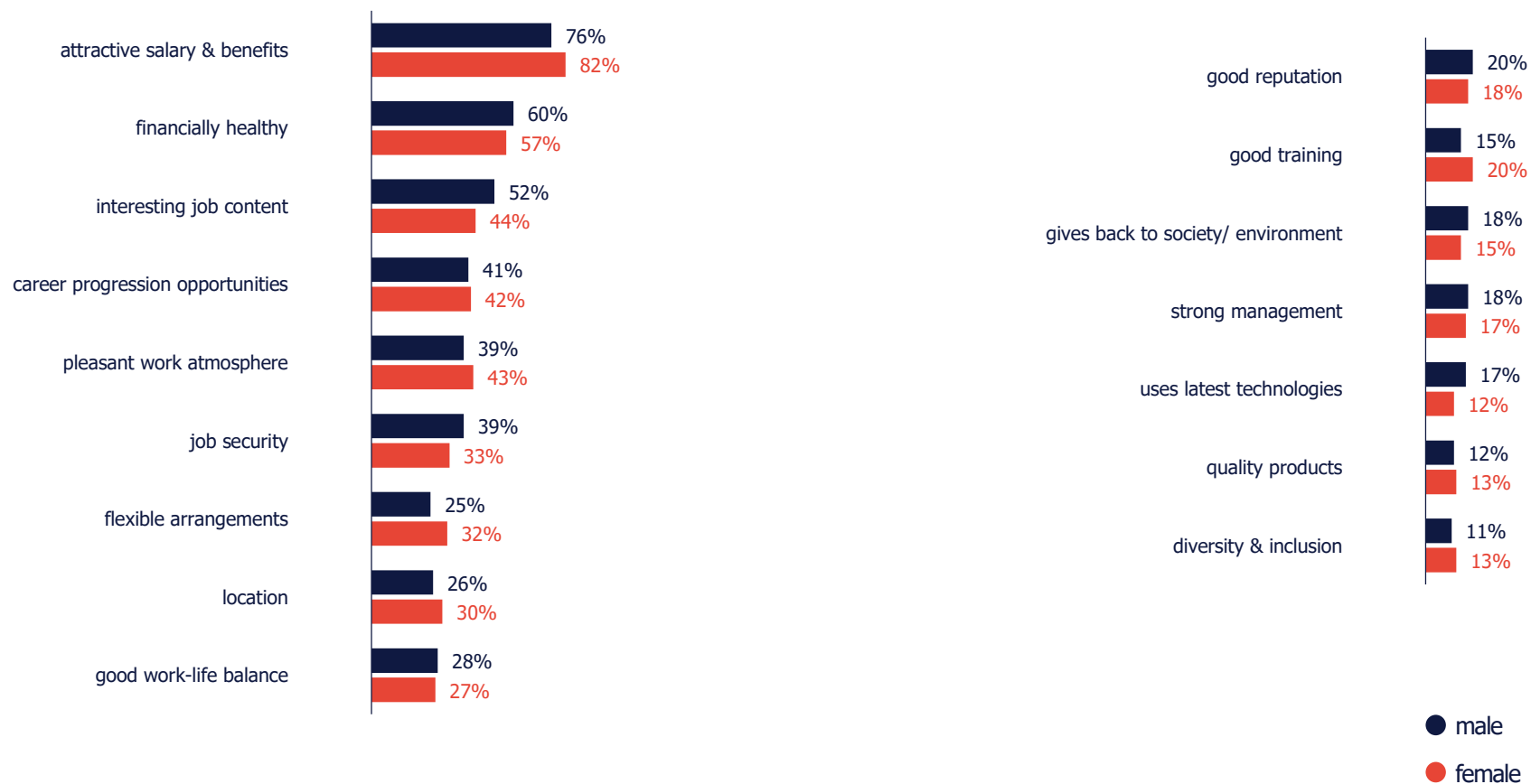


Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.

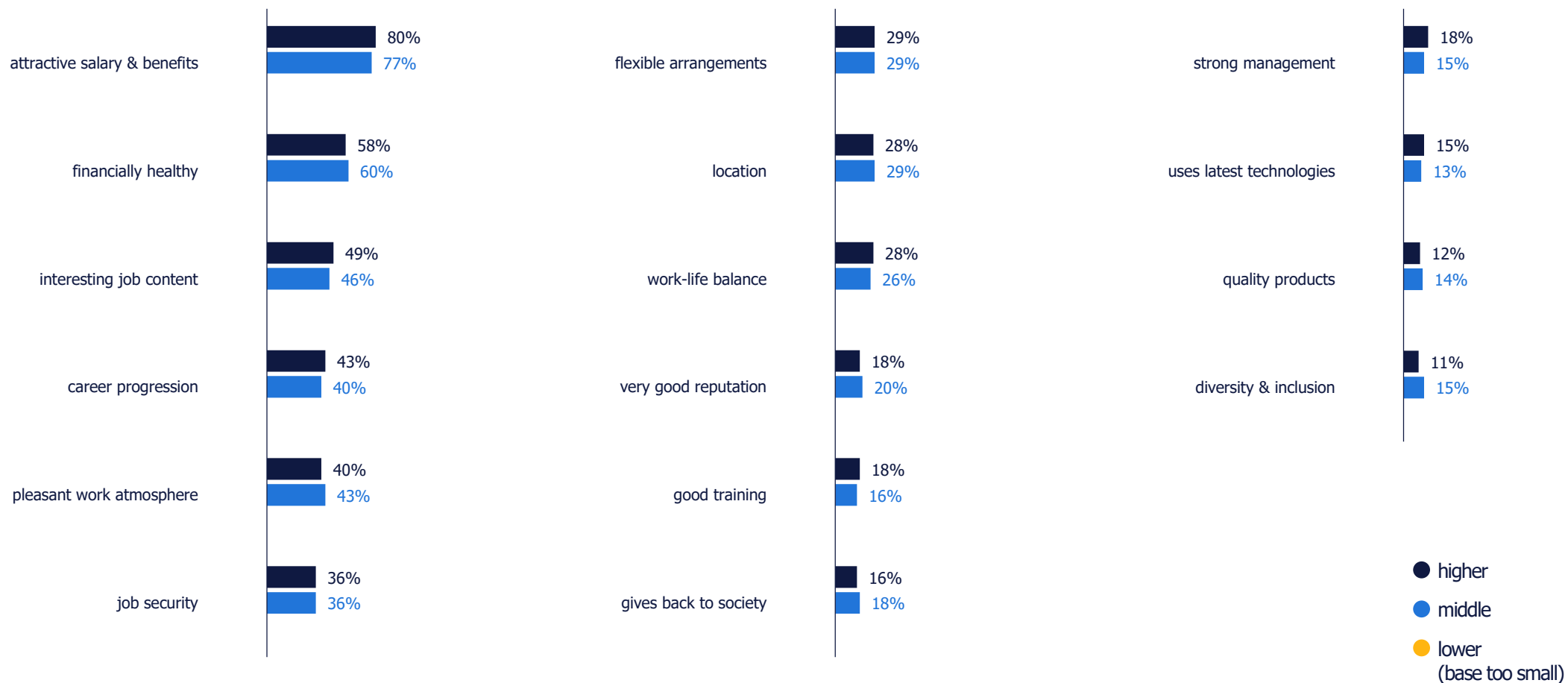
*2017: work that is stimulating and challenging



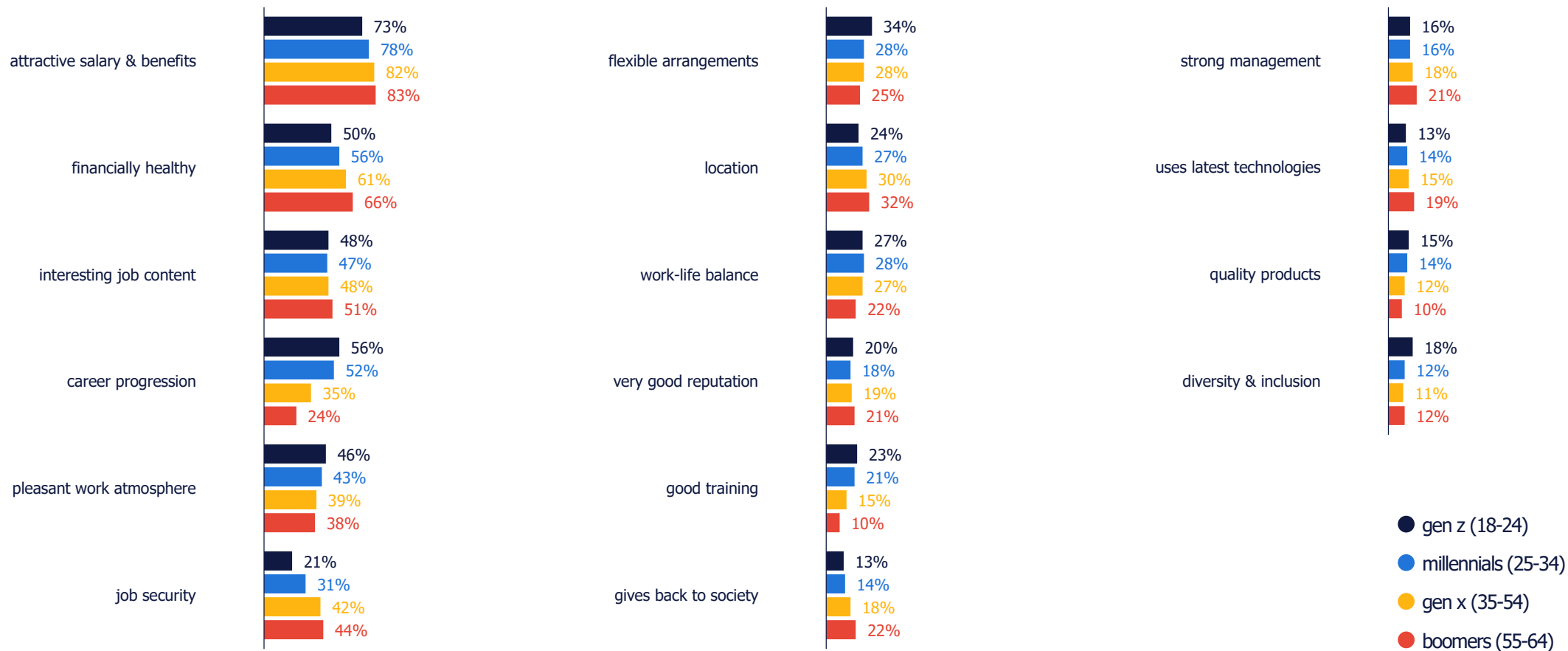
EVP driver importance by gender.



EVP driver importance by education.



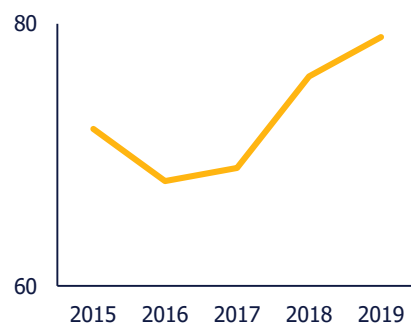
EVP driver importance by age.



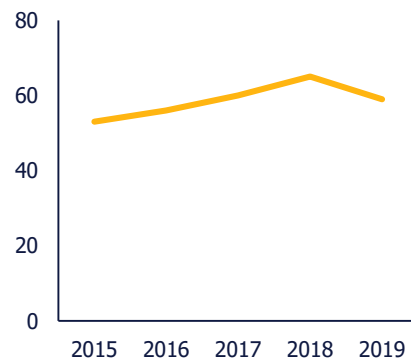
EVP driver importance trends, total.

1/2

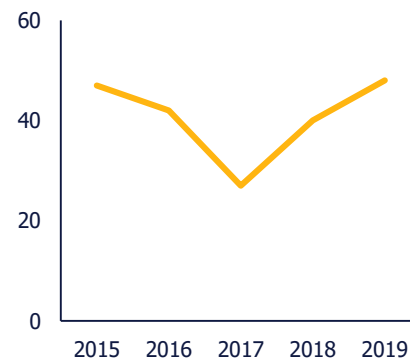
attractive salary & benefits



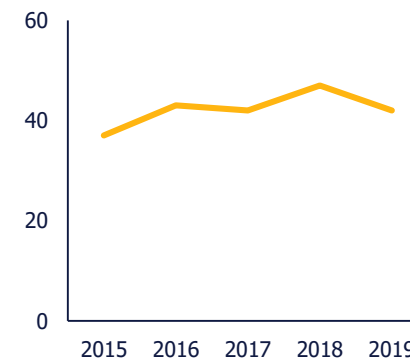
financially healthy



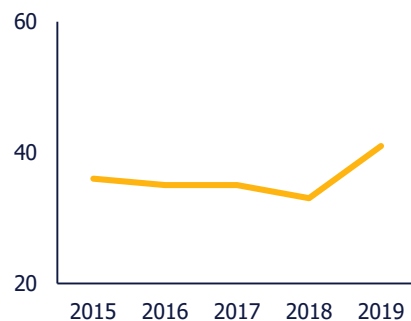
interesting job content*



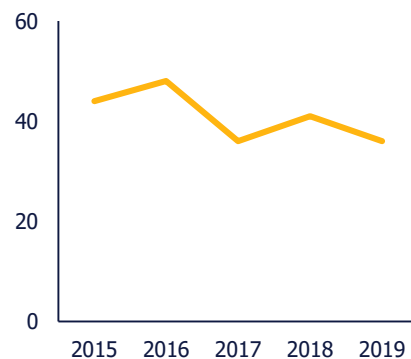
career progression



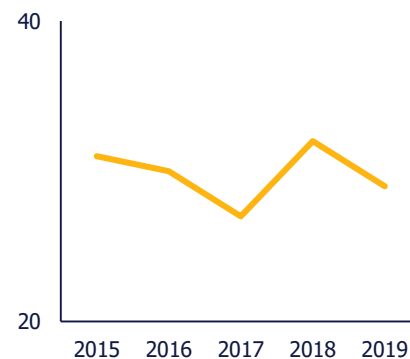
pleasant work atmosphere



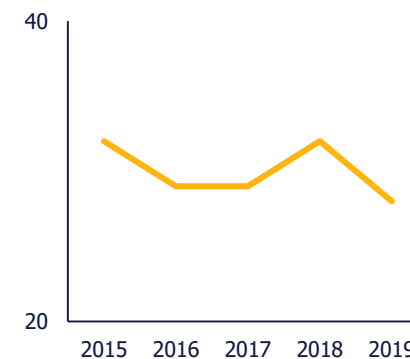
job security



flexible arrangements



location



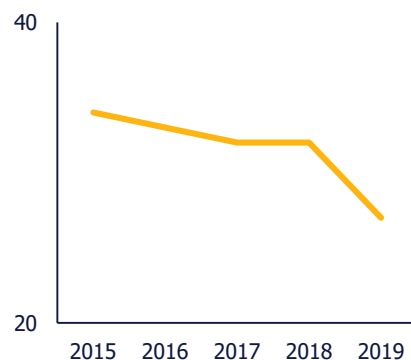
*2017: work that is stimulating and challenging



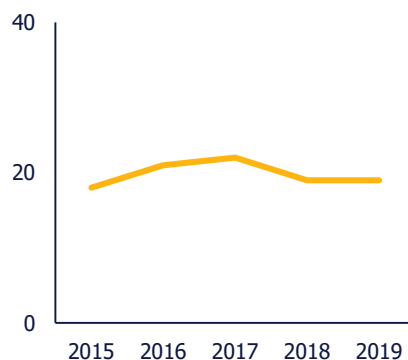
EVP driver importance trends, total.

2/2

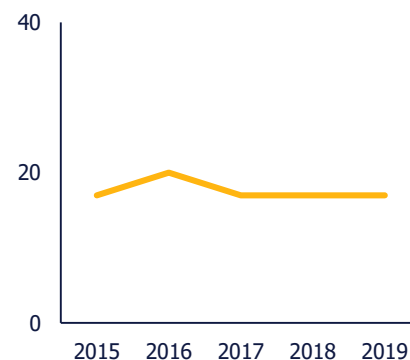
work-life balance



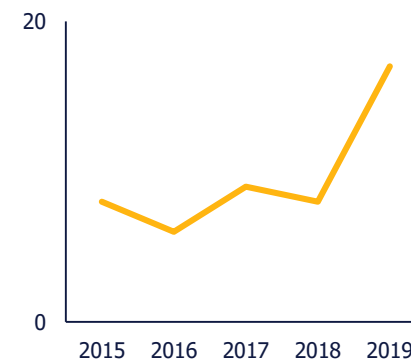
very good reputation*



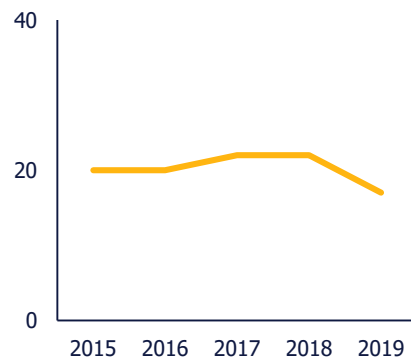
good training



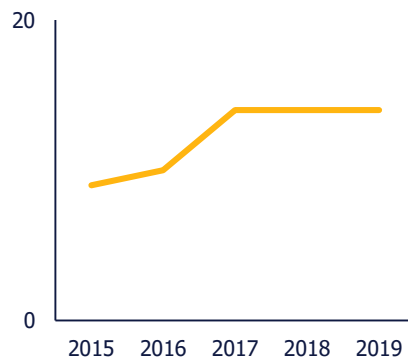
gives back to society



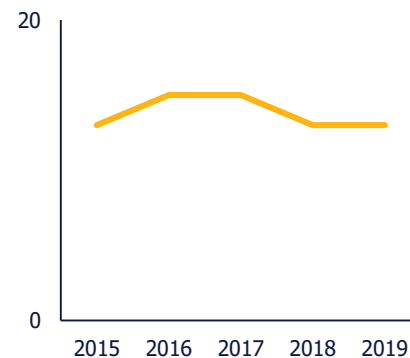
strong management



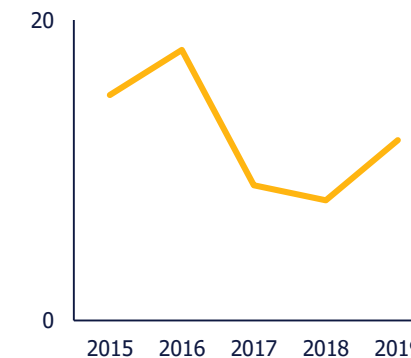
uses latest technologies



quality products



diversity & inclusion

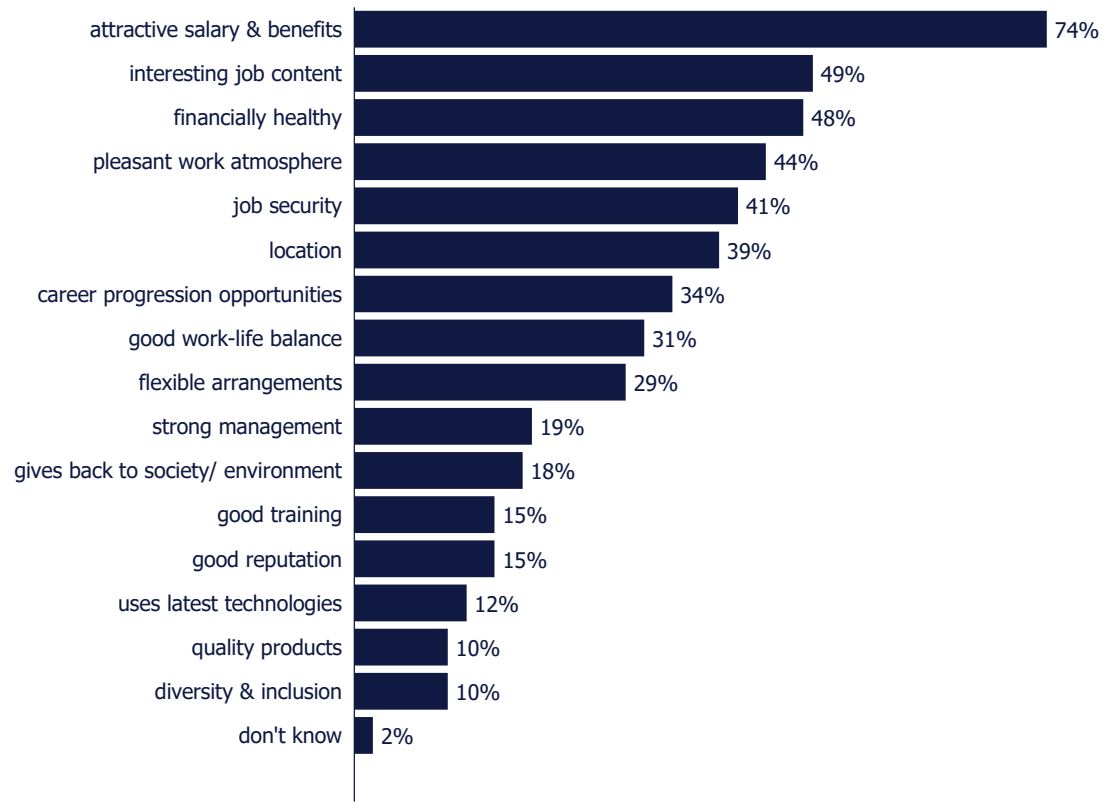


*previous to 2017: strong image/strong values

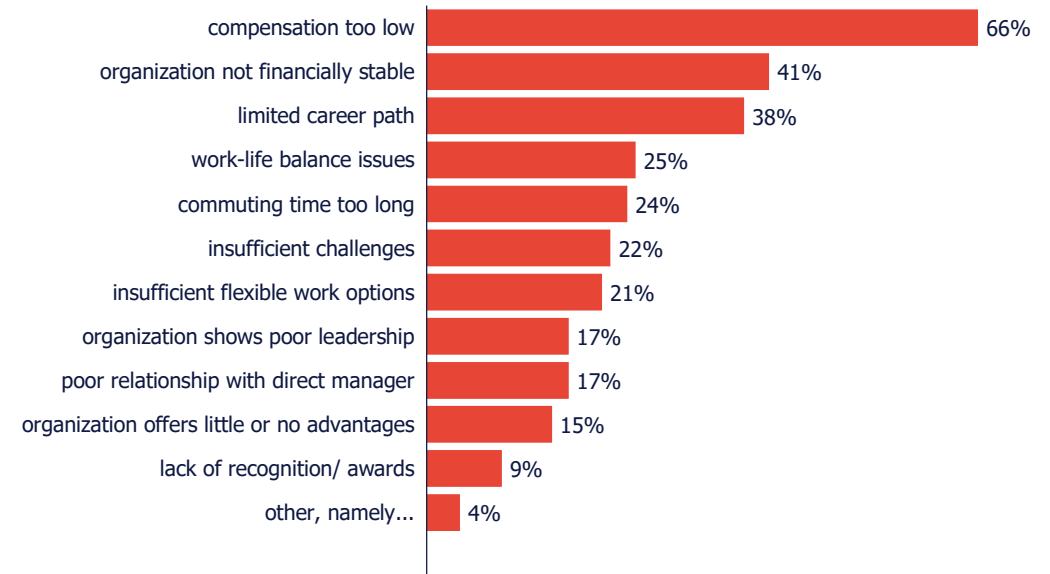


what factors do the russians stay or leave for.

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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randstad

human forward.

