

employer
brand research
2019



country report
usa.

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

- 8,174 respondents

fieldwork

- online interviews
- between 5 and 17 december 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.



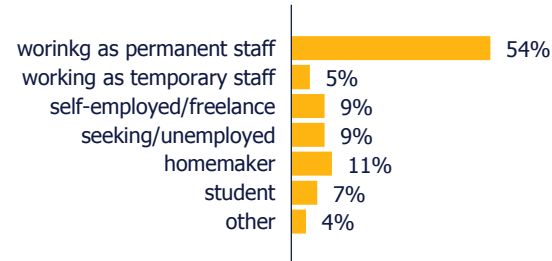
sample composition in usa

socio-demographics, employment situation, region.

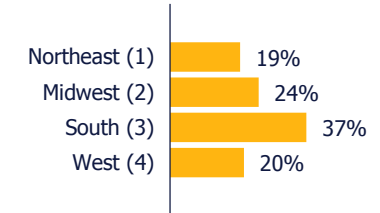
gender



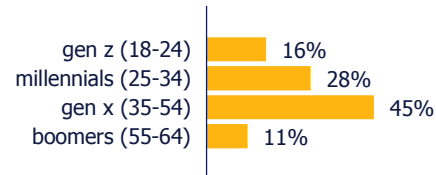
situation



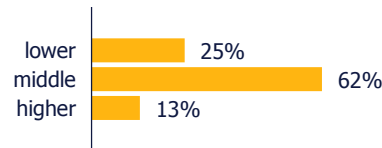
region



age



education



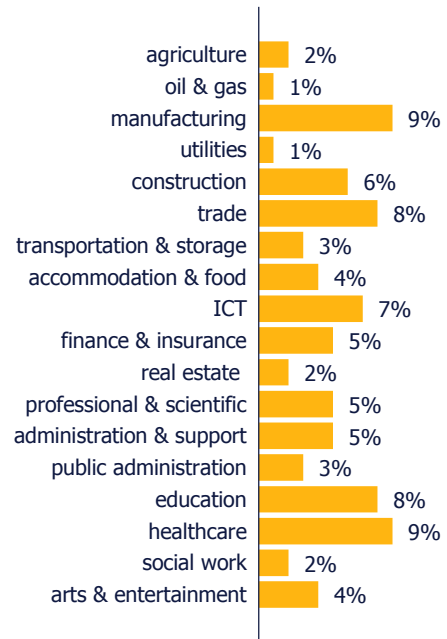
1. Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont
2. Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin
3. Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia
4. Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming

total sample: 8,174
fieldwork: between 5 and 17 december 2019

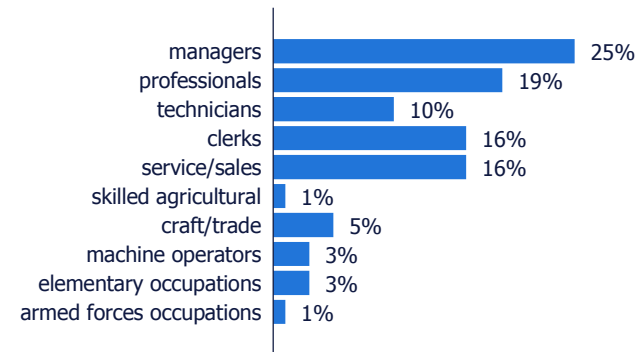


sample composition in usa

sector



function

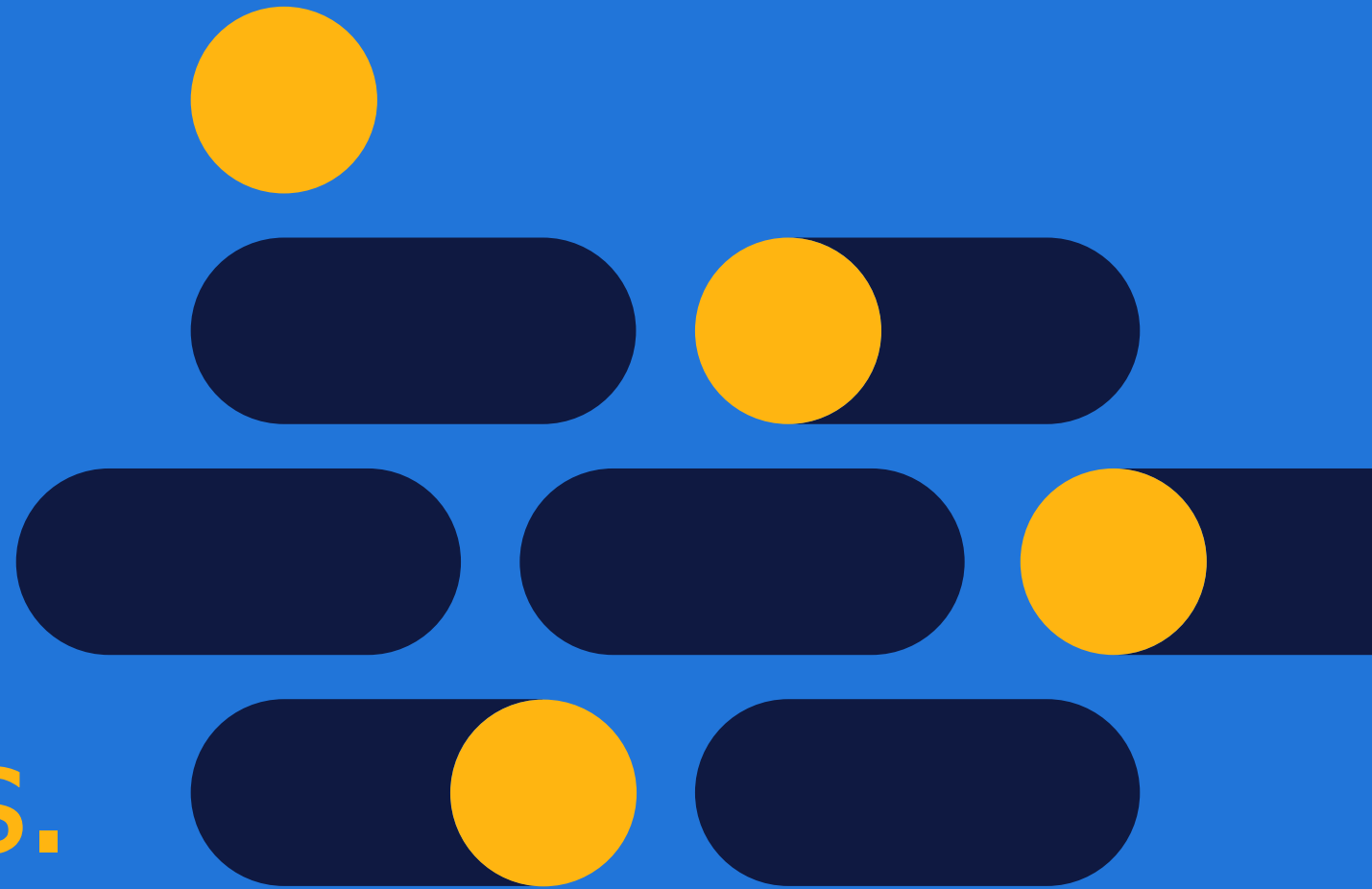


base: currently employed (n=5,571)



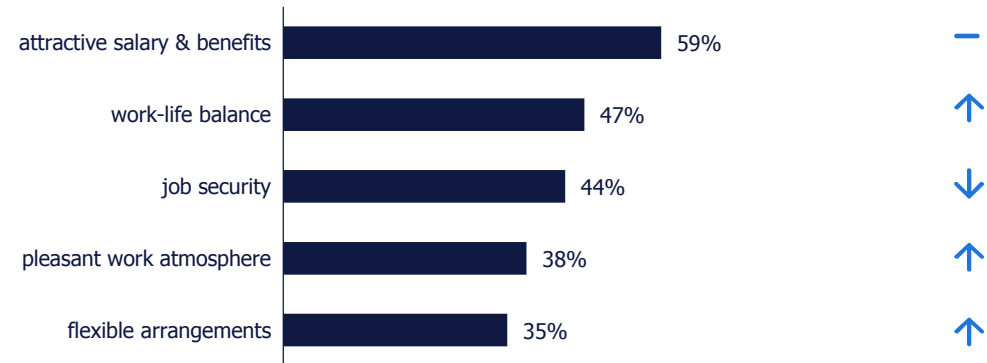
country

EVP drivers.



what potential employees want when choosing an employer.

most important criteria

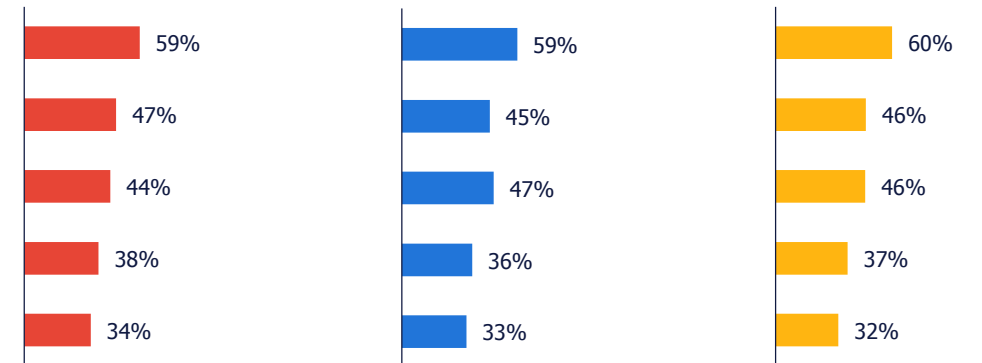


versus 2018

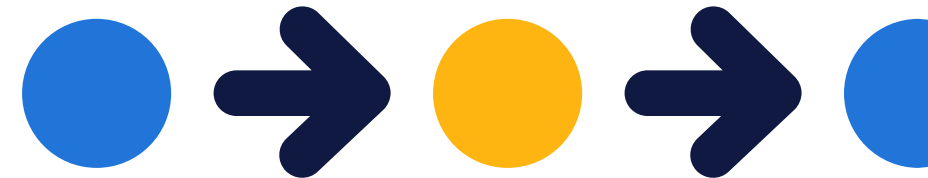
north america

2018

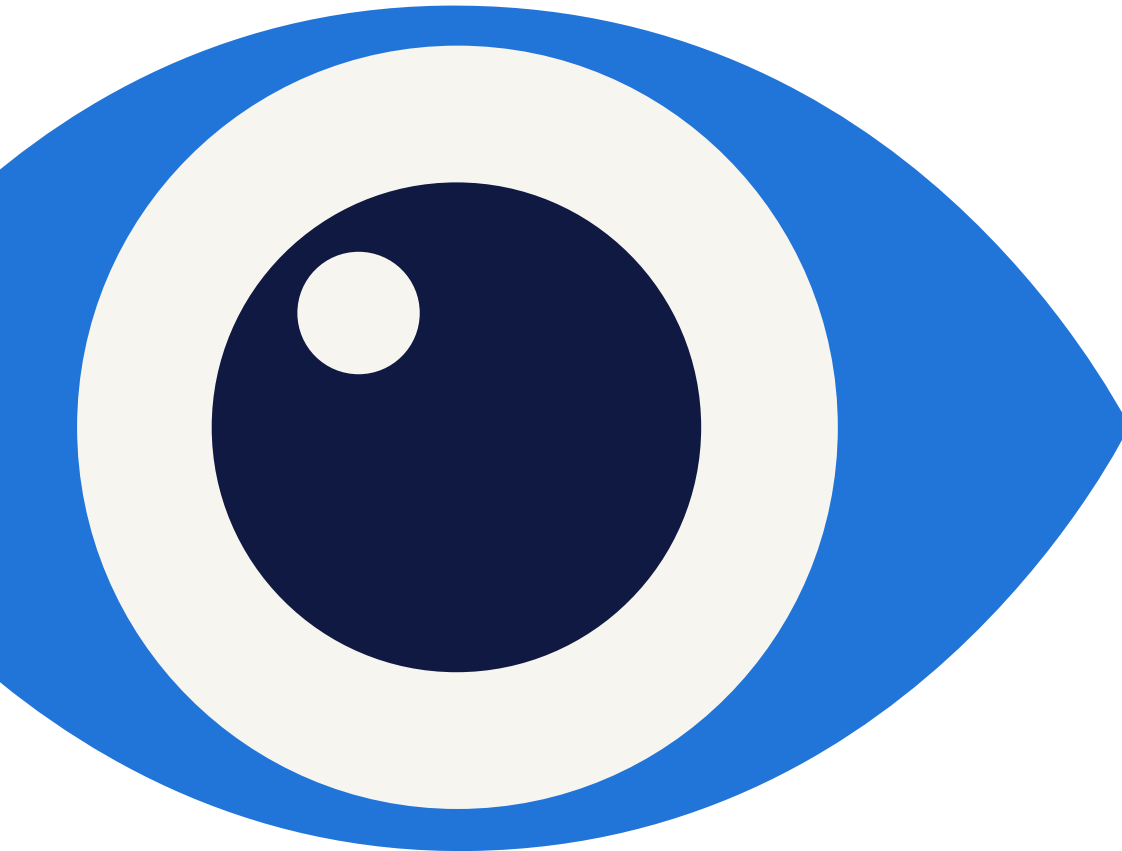
2017



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



perception of employer offer in usa and the region.



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

employers in usa are perceived to offer.

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

employers in north america are perceived to offer.

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

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

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)

40%

of the gen z's find strong management an important pull factor towards an employer. This is higher when compared to older workforce.

gen x (35-54)

40%

of the gen x's find pleasant work atmosphere a very important pull factor towards an employer. Among younger generations, this factor is deemed less important.

millennials (25-34)

37%

of the millennials seek career opportunities. Other generations are less interested in this offering from their employer.

boomers (55-64)

69%

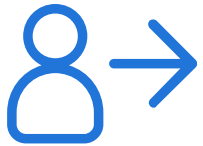
of the boomers find attractive salary & benefits a very important pull factor towards an employer. This is less so among the other cohorts.



[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.

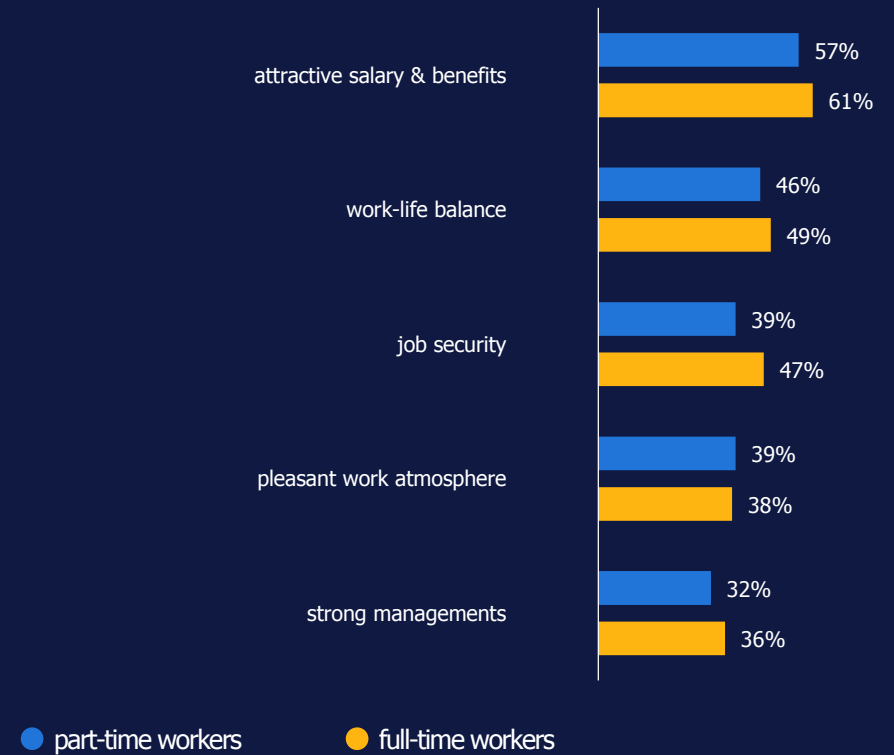


18%

of today's workforce
works part-time.

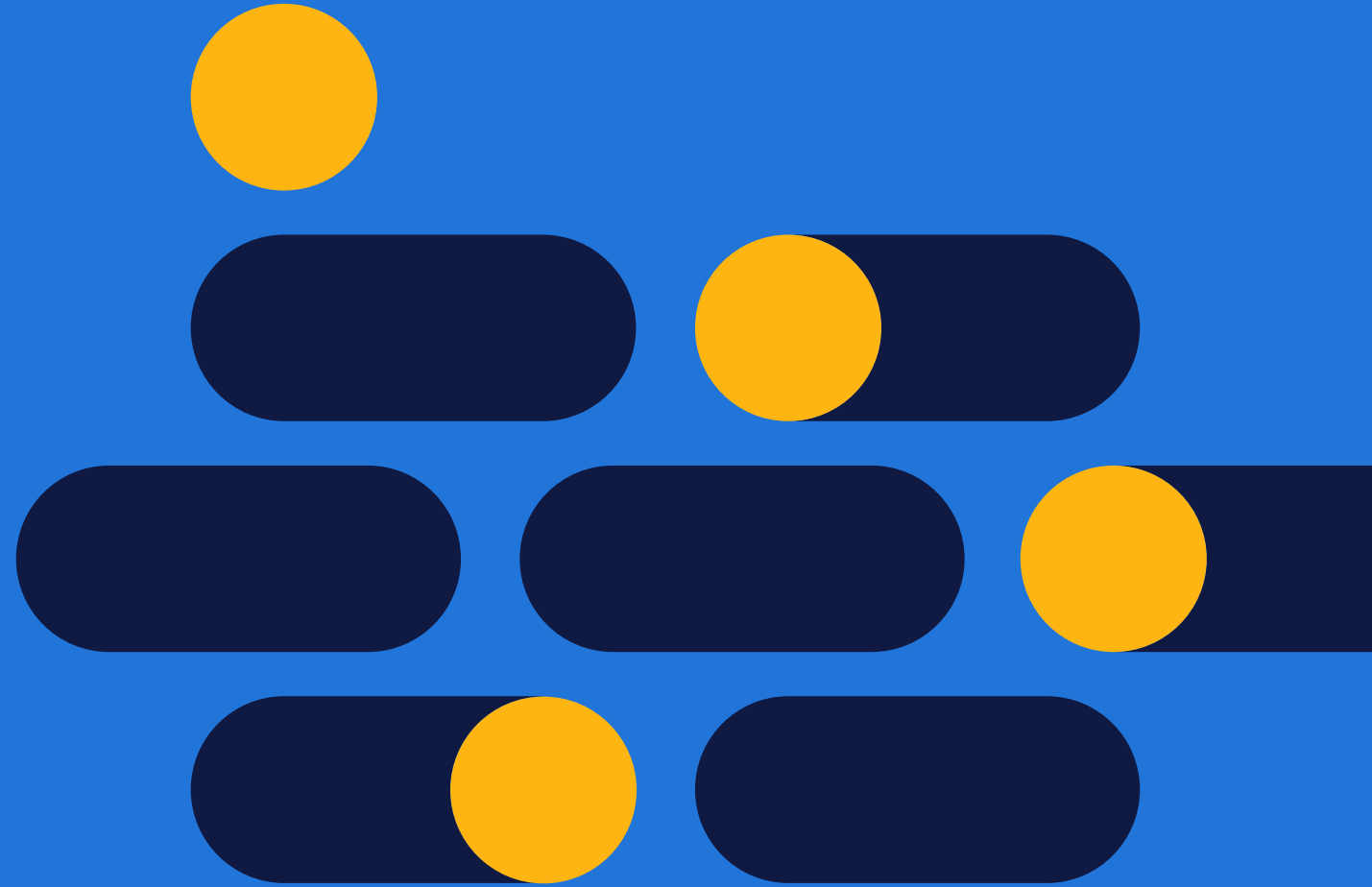


most important attributes



switchers and stayers

in focus.



changing employer usa vs north america.

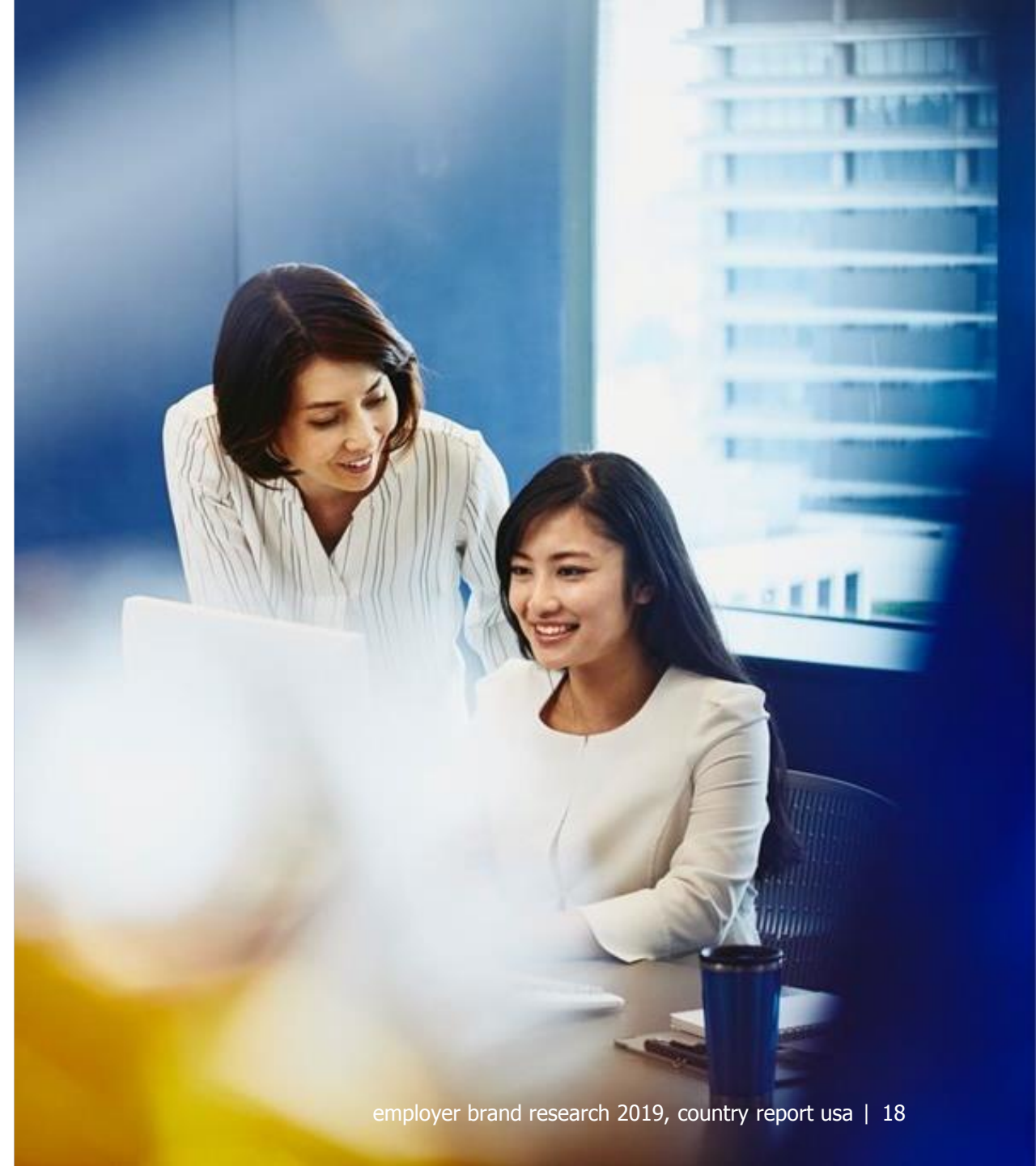
switchers: changed employer in the past year.



stayers: stayed with their employer in the past year.

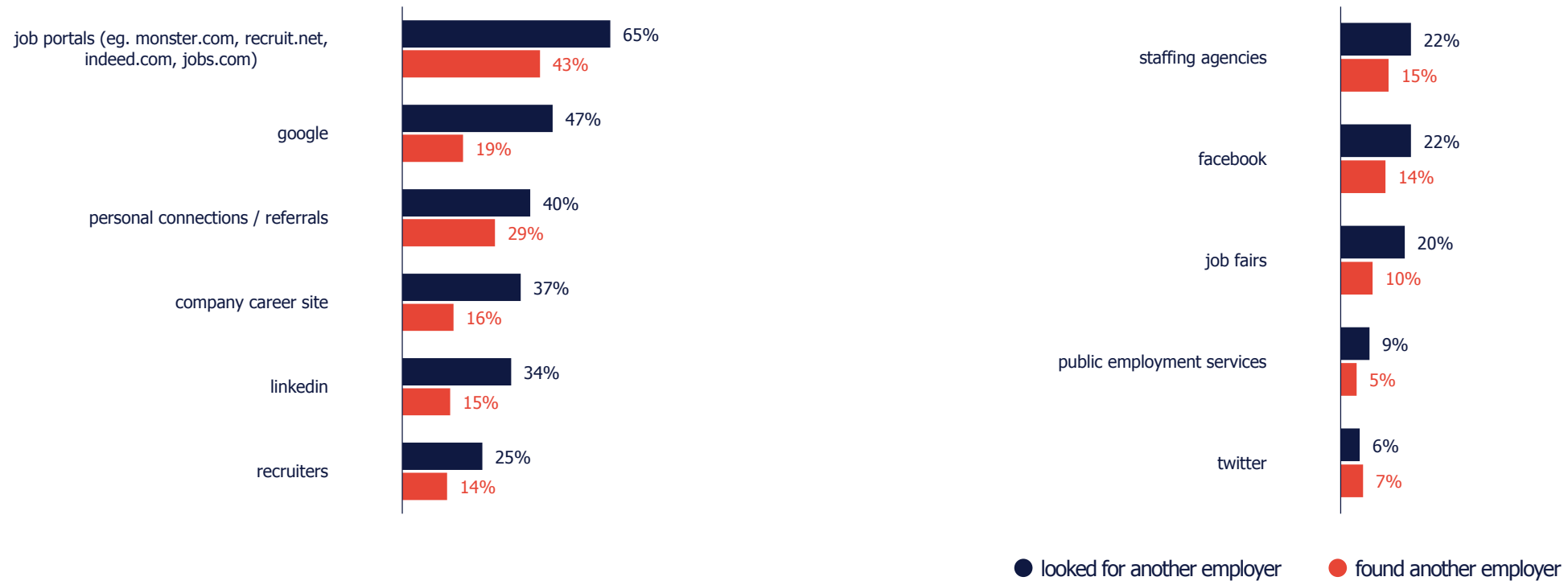


intenders: plan to change employer within the next year.



how do the american workers look for and find employers.

channels used to look for and find employers



most important attributes switchers vs stayers.



21% (20%)*

switchers: changed employer in the past year.



79% (80%)*

stayers: stayed with their employer in the past year.

*in 2018



most important attributes



● switchers

● stayers

most important attributes intenders.



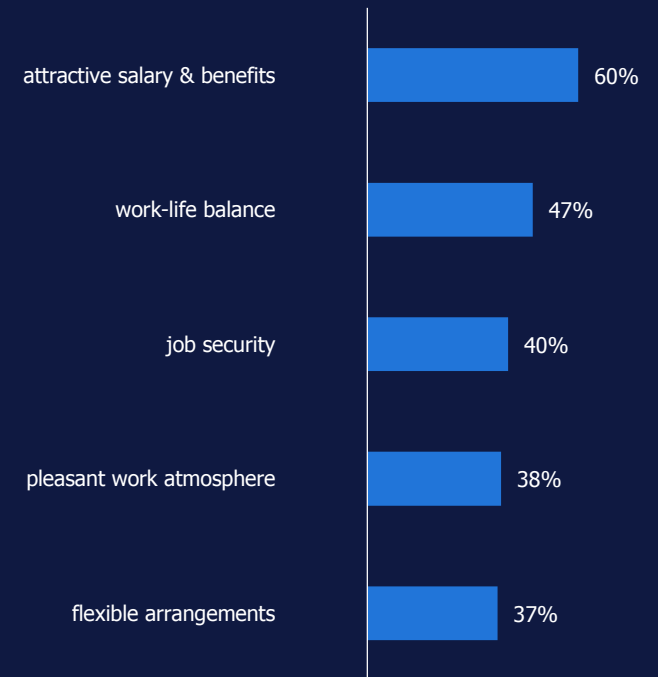
26% (26%)*

intenders: plan to
change employer
within the next year.

*in 2018

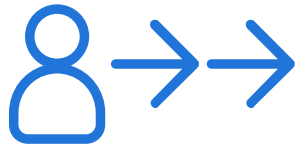


most important attributes



● intenders

channels to look for employers intenders.



50% (53%)*

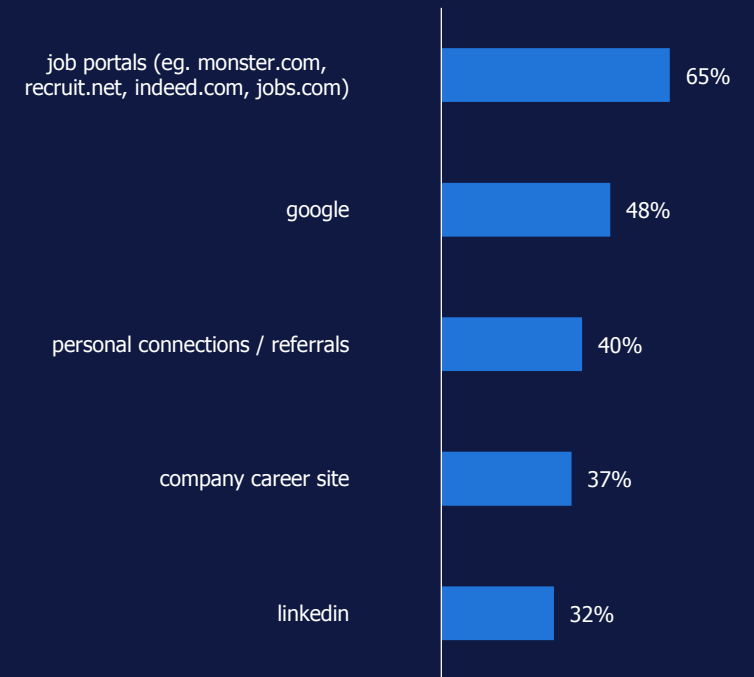
of last year's switchers**
intend to switch again
next year.

** n= 1,707 switched last year

*in 2018



channels to look for employers



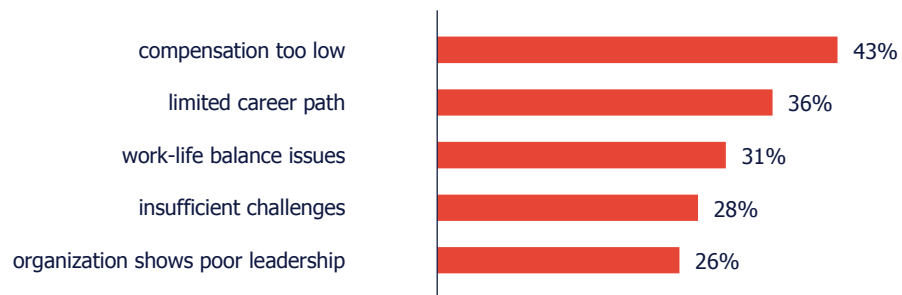
● intenders

why do americans stay or leave.

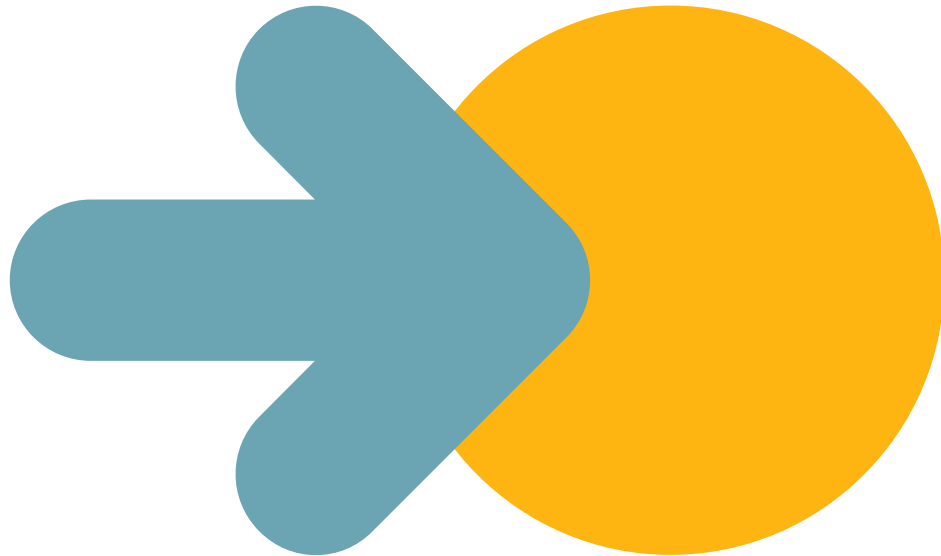
main reasons to stay



main reasons to leave



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



gen z (18-24)

34%

of the gen z's are staying with their employer for strong management. This is higher when compared to older workforce.

gen x (35-54)

47%

of the gen x's stay with their employer for good work-life balance. This is less so among the younger cohorts.

millennials (25-34)

34%

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

boomers (55-64)

49%

of the boomers stay with their employer for a convenient location. Among other generations, this factor is deemed less important.

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

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

gen z (18-24)

22%

of the gen z's are leaving their employer if their organization offers little of no advantages. This is higher when compared to older workforce.

gen x (35-54)

23%

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

millennials (25-34)

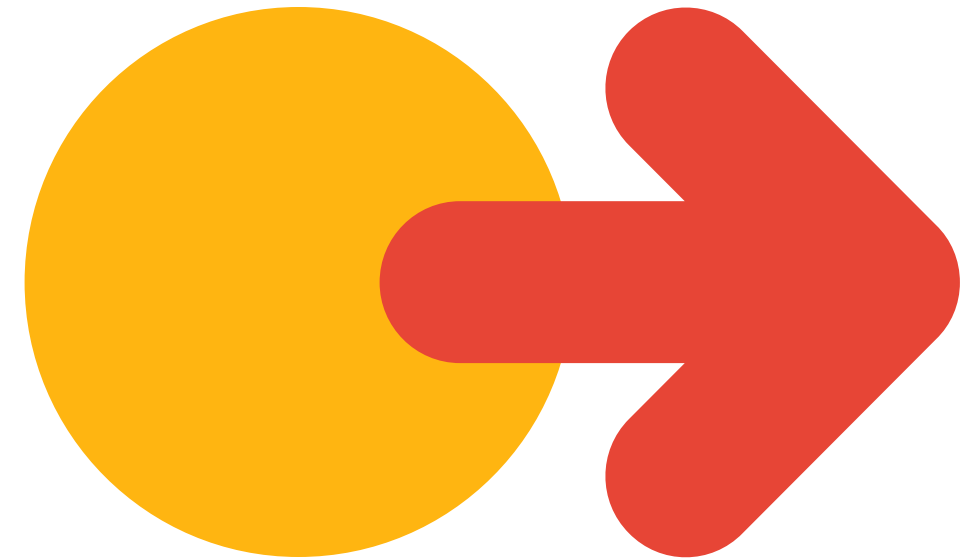
40%

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

boomers (55-64)

49%

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

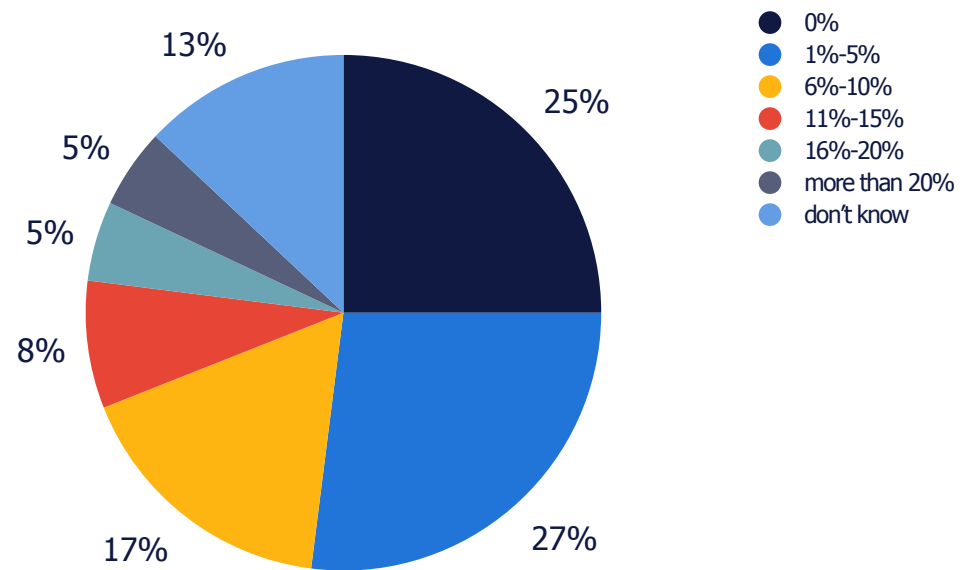


[click here](#) for a breakdown of all results.



willingness to forfeit salary for more work security.

amount of salary employees are willing to forfeit



usa

18%

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

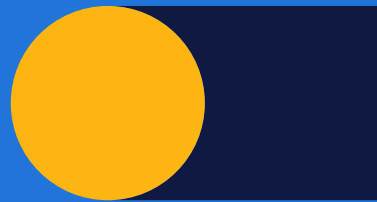
north america

18%

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



ideal employer

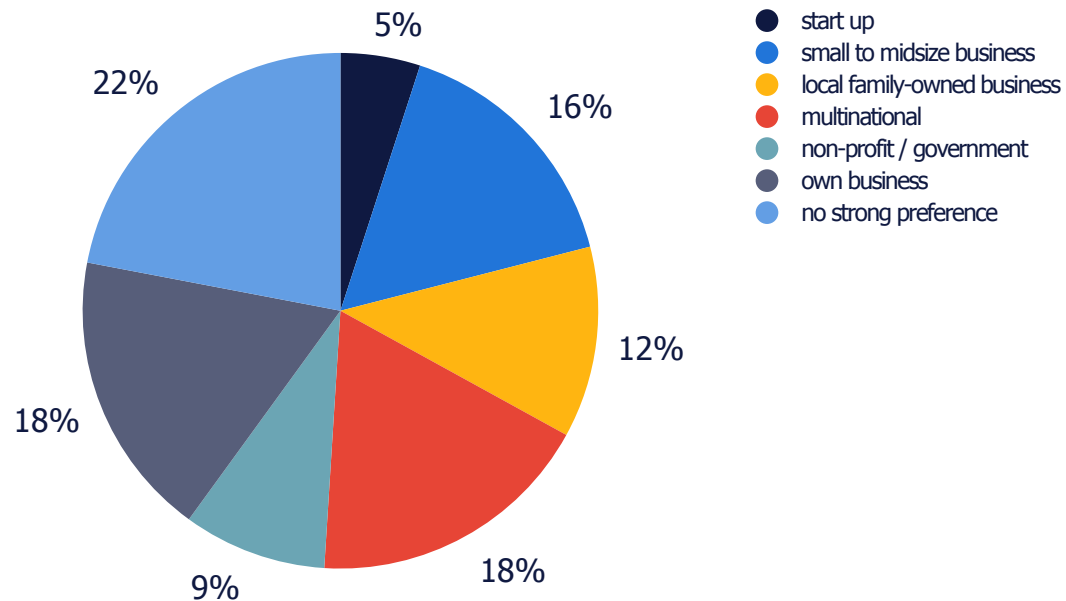


in focus.



18% of the americans prefer to work for large (multinational) corporation.

preferred company type



gen z (18-24)

20%

Would rather have own business

gen x (35-54)

23%

Has no strong preference

millennials (25-34)

21%

Would prefer to work for a large (multinational) corporation

boomers (55-64)

31%

Has no strong preference

company type preference reasons why.

multinational (18%)

job security

financial health

attractive salary & benefits

local family-owned (12%)

work-life balance

pleasant work atmosphere

job security

own business (18%)

work-life balance

flexible arrangements

pleasant work atmosphere

non-profit / government (9%)

job security

work-life balance

interesting job content

small to midsize (16%)

pleasant work atmosphere

work-life balance

job security

start-up (5%)

career progression

good training

job security



company type preference switchers vs stayers.



16%

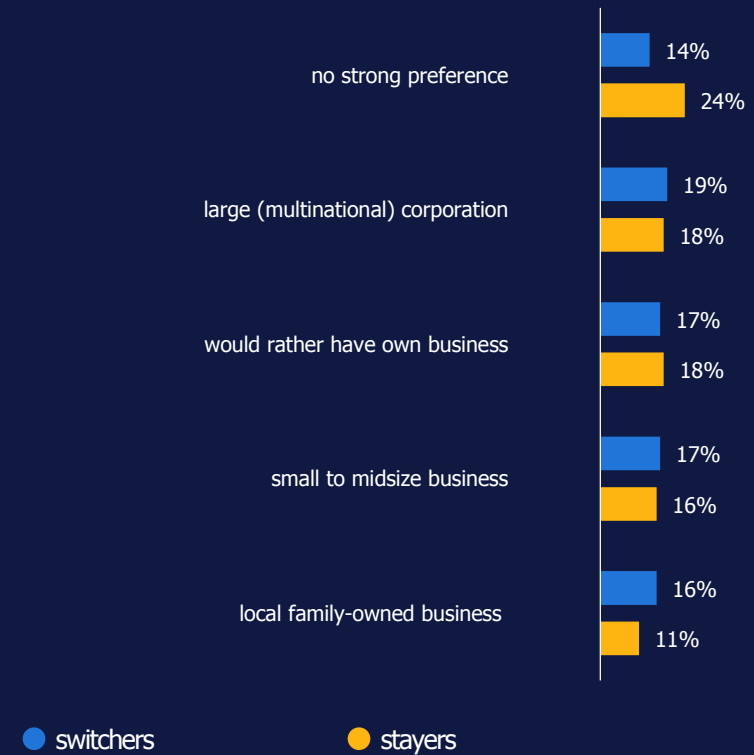
of the switchers prefer to work for a local family-owned business.



24%

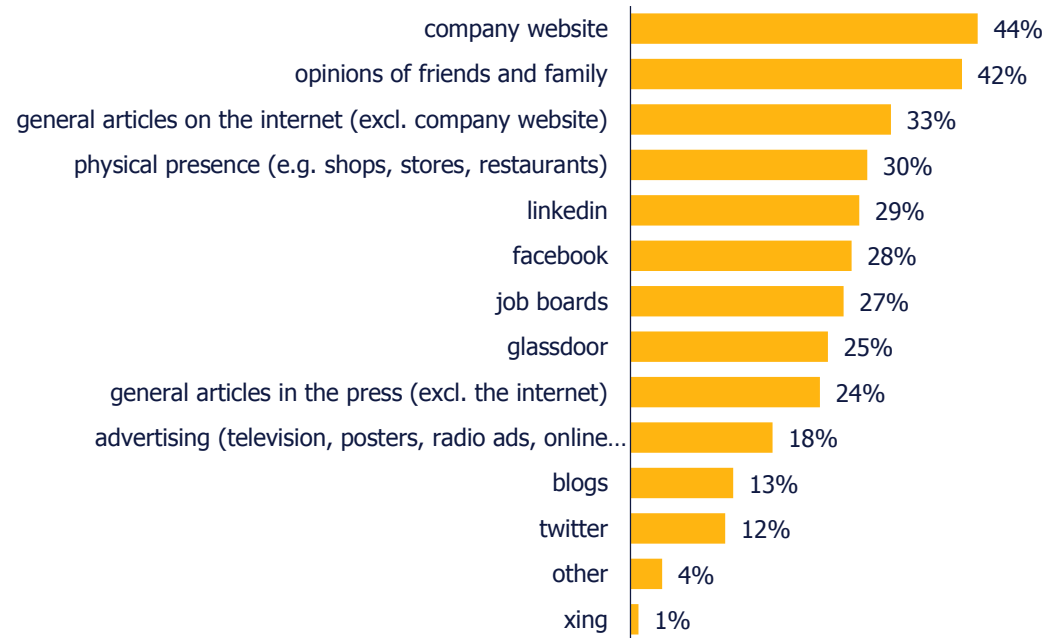
of the stayers have no strong preference.

company type preference



86% of the americans check potential employer's reputation.

channels for reputation check



gen z (18-24)

28%

advertising (Television, Posters, Radio ads, online banners, excl. Press)

gen x (35-54)

45%

company website

millennials (25-34)

33%

linkedin

boomers (55-64)

26%

don't check employers' reputation



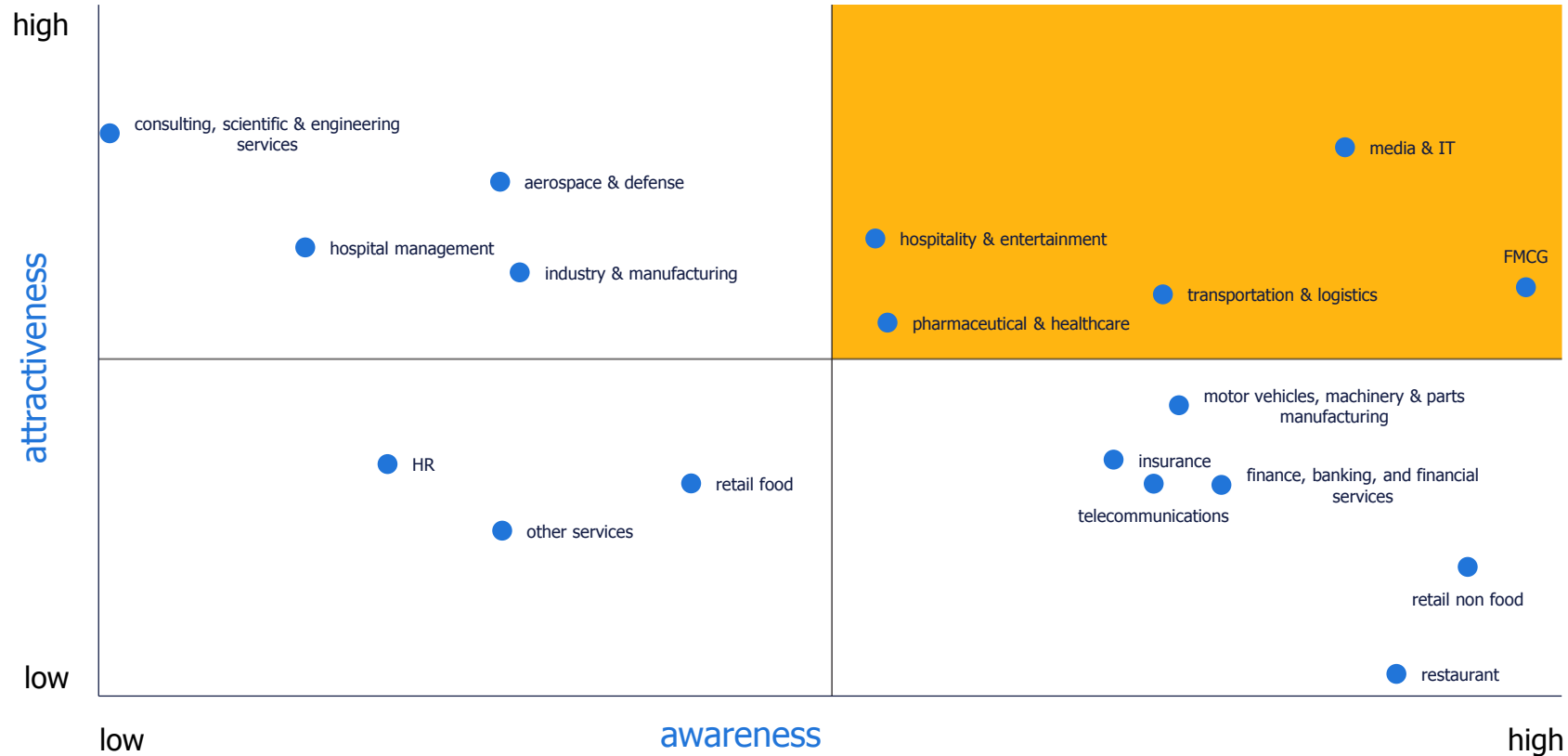
sector



insights.



top performing sectors in usa 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.



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

1/2

sector	top 3 EVP drivers		
	1	2	3
01 consulting, scientific & engineering services	uses latest technologies	financially healthy	career progression
02 media & IT	uses latest technologies	financially healthy	very good reputation
03 aerospace & defense	uses latest technologies	financially healthy	attractive salary & benefits
04 hospitality & entertainment	financially healthy	very good reputation	uses latest technologies
05 hospital management	financially healthy	uses latest technologies	job security
06 industry & manufacturing	uses latest technologies	financially healthy	attractive salary & benefits
07 FMCG	financially healthy	very good reputation	job security
08 transportation & logistics	financially healthy	uses latest technologies	job security
09 pharmaceutical & healthcare	financially healthy	uses latest technologies	job security
10 motor vehicles, machinery & parts manufacturing	uses latest technologies	financially healthy	very good reputation



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

2/2

	top 3 EVP drivers		
sector	1	2	3
11 insurance	financially healthy	job security	uses latest technologies
12 HR	financially healthy	uses latest technologies	very good reputation
13 retail food	financially healthy	very good reputation	job security
14 telecommunications	uses latest technologies	financially healthy	job security
15 finance, banking, and financial services	financially healthy	uses latest technologies	career progression
16 other services	financially healthy	job security	uses latest technologies
17 retail non food	financially healthy	very good reputation	uses latest technologies
18 restaurant	financially healthy	very good reputation	uses latest technologies



top



employers.

top employers in usa.

top 10 employers 2019

- 01 Microsoft Corporation
 - 02 The Walt Disney Company
 - 03 Computer Sciences Corporation (CSC)
 - 04 United Technologies Corporation
 - 05 The Coca-Cola Company
 - 06 Lockheed Martin Corporation
 - 07 The Boeing Company
 - 08 Fedex Corporation
 - 09 Community Health Systems, Inc.
 - 10 L-3 Communications Holdings, Inc.
-

top 10 employers 2018

- 01 The Walt Disney Company
 - 02 Microsoft Corporation
 - 03 The Coca-Cola Company
 - 04 Oracle Corporation
 - 05 The Procter & Gamble Company
 - 06 Telephone and Data Systems, Inc.
 - 07 United Technologies Corporation
 - 08 United Parcel Service, Inc.
 - 09 Northrop Grumman Corporation
 - 10 Computer Sciences Corporation (CSC)
-

usa's top companies

top 3 EVP drivers of the top 5 companies.

	top 3 EVP drivers		
top 5 companies	1	2	3
1 Microsoft Corporation	financially healthy	uses latest technologies	attractive salary & benefits
2 The Walt Disney Company	financially healthy	interesting job content	uses latest technologies
3 Computer Sciences Corporation (CSC)	uses latest technologies	career progression	attractive salary & benefits
4 United Technologies Corporation	uses latest technologies	financially healthy	career progression
5 The Coca-Cola Company	financially healthy	very good reputation	job security



top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	Microsoft Corporation	Lockheed Martin Corporation	Computer Sciences Corporation (CSC)
career progression	Microsoft Corporation	Computer Sciences Corporation (CSC)	Lockheed Martin Corporation
financially healthy	Microsoft Corporation	The Walt Disney Company	The Coca-Cola Company
gives back to society	Community Health Systems, Inc.	Whole Foods Market, Inc.	Kaiser Foundation Health
interesting job content	The Walt Disney Company	Microsoft Corporation	The Boeing Company
job security	Microsoft Corporation	The Coca-Cola Company	Kaiser Foundation Health
pleasant work atmosphere	The Walt Disney Company	Computer Sciences Corporation (CSC)	Microsoft Corporation
uses latest technologies	Microsoft Corporation	The Boeing Company	IBM (International Business Machines Corporation)
very good reputation	Microsoft Corporation	The Walt Disney Company	The Coca-Cola Company
work-life balance	National Amusements, Inc.	Kaiser Foundation Health	Telephone and Data Systems, Inc.



deep dive

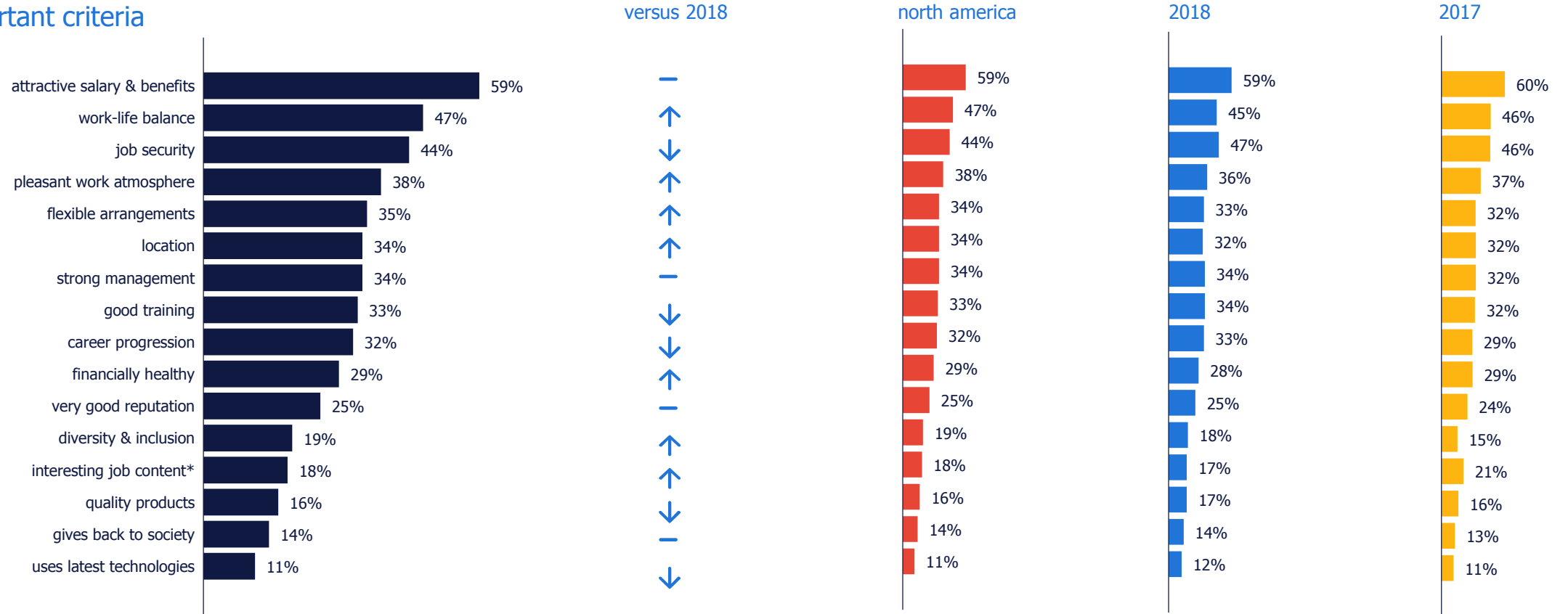
appendix 1.



what potential employees want

the most important criteria when choosing an employer.

important criteria

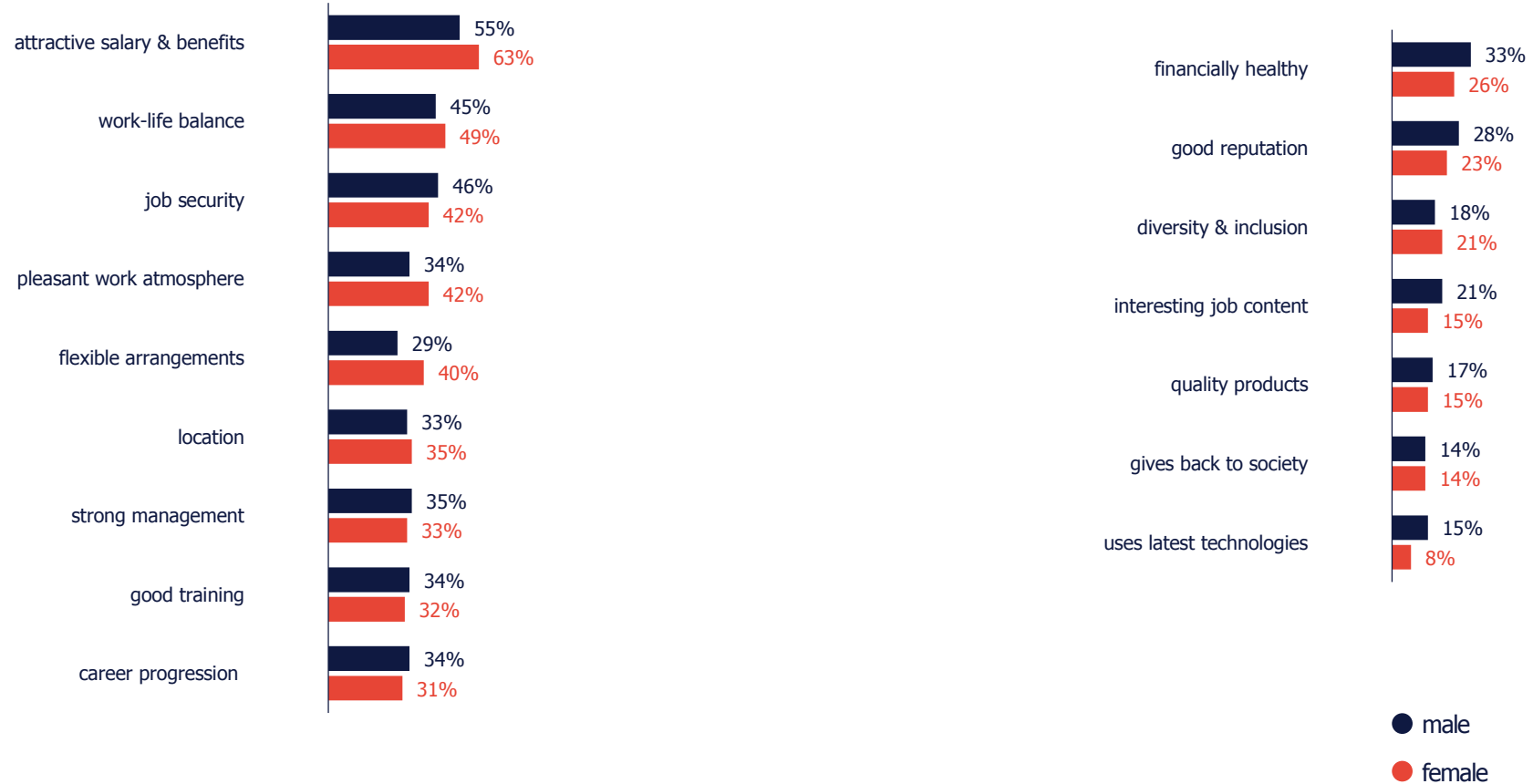


Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.

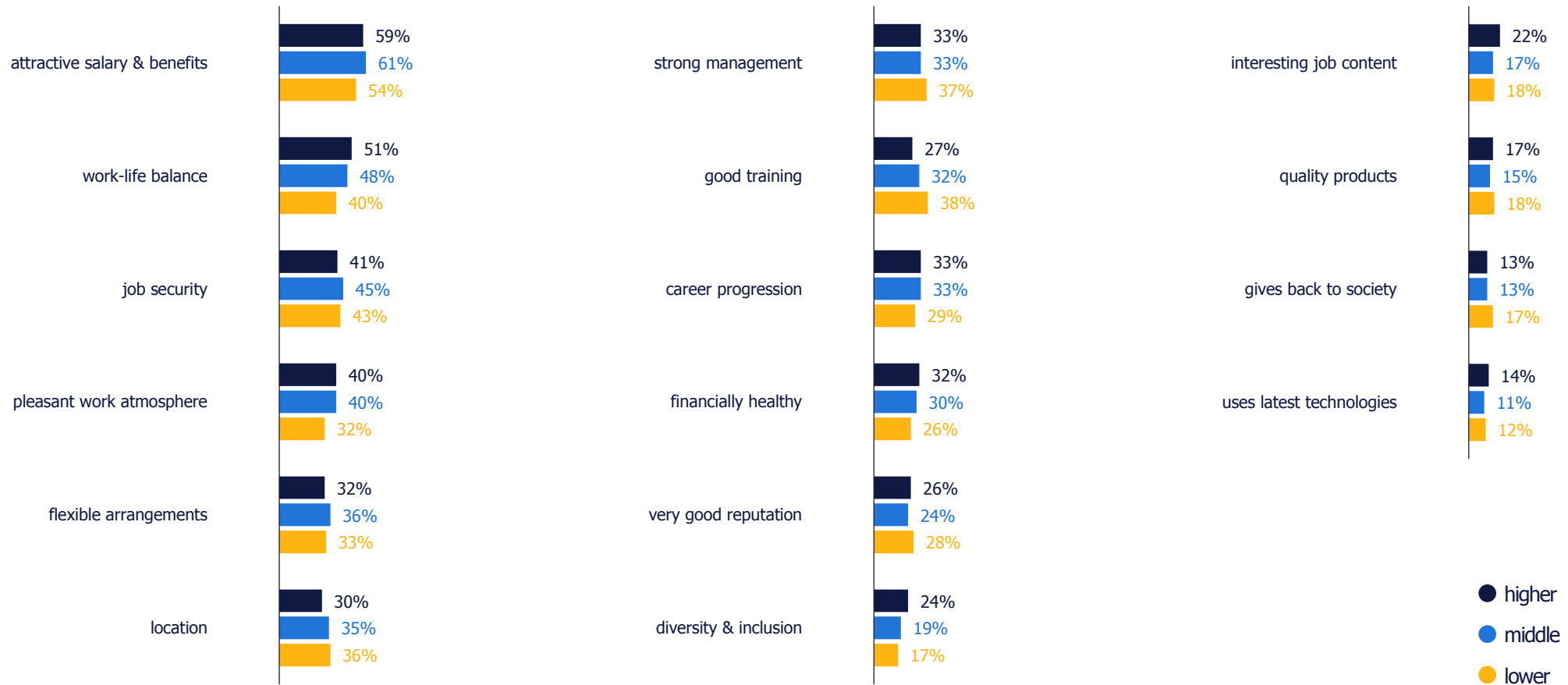
*2017: work that is stimulating and challenging



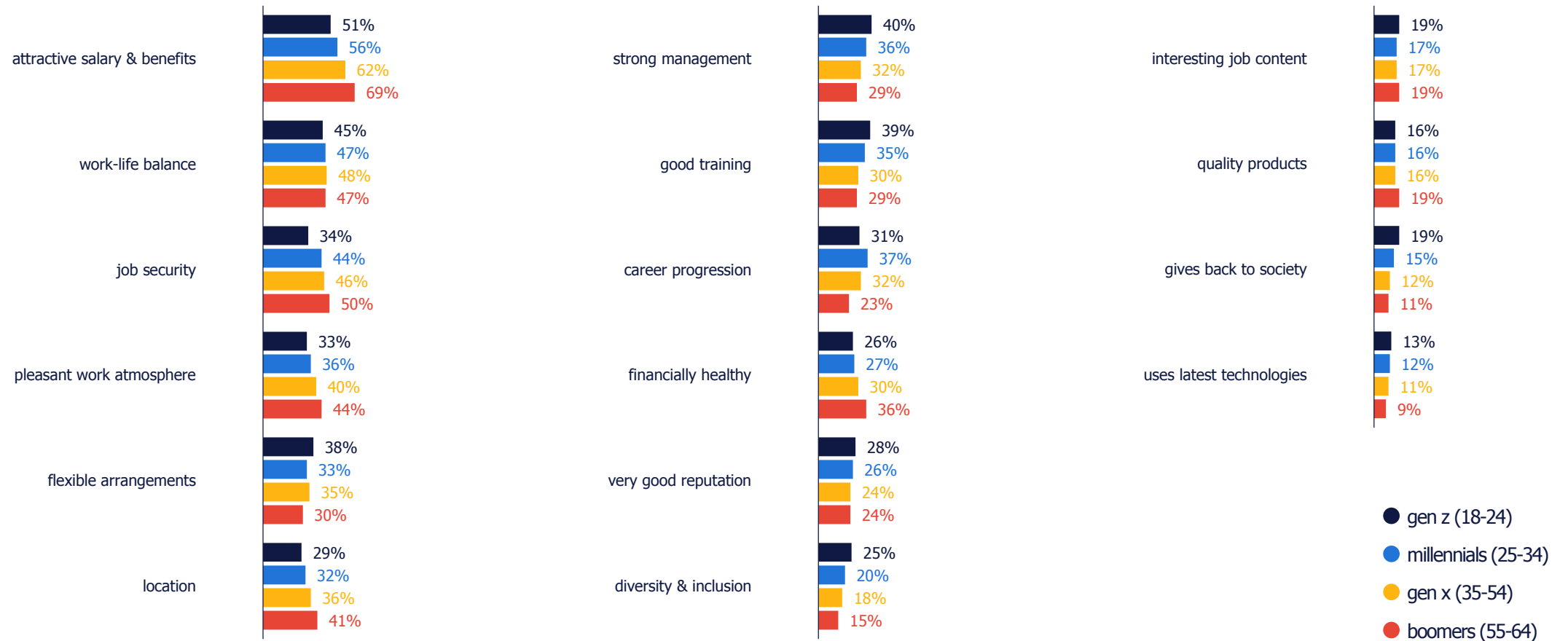
EVP driver importance by gender.



EVP driver importance by education.



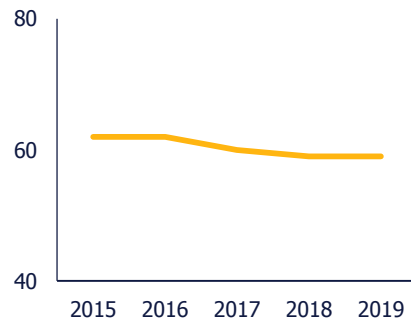
EVP driver importance by age.



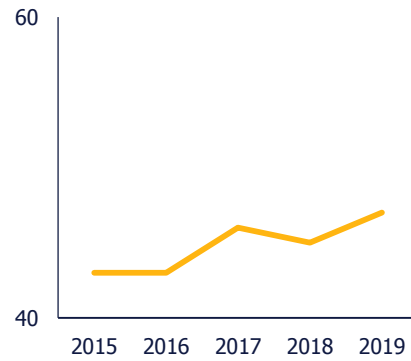
EVP driver importance trends, total.

1/2

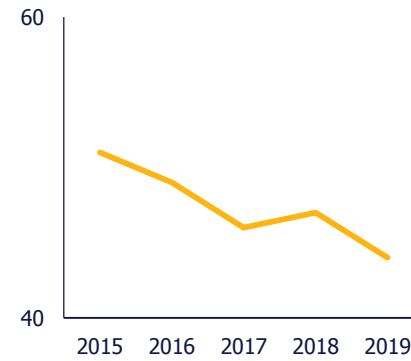
attractive salary & benefits



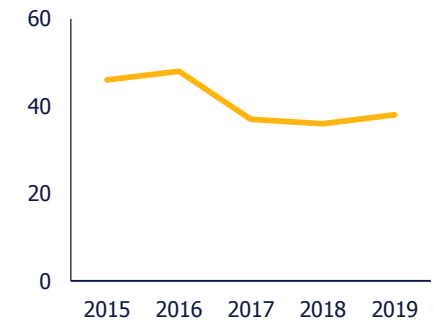
work-life balance



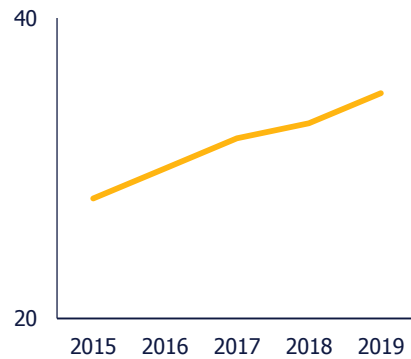
job security



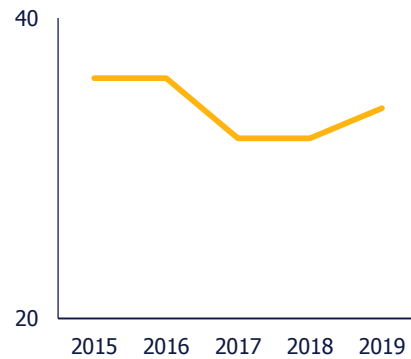
pleasant work atmosphere



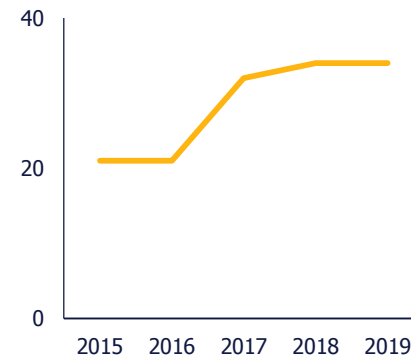
flexible arrangements



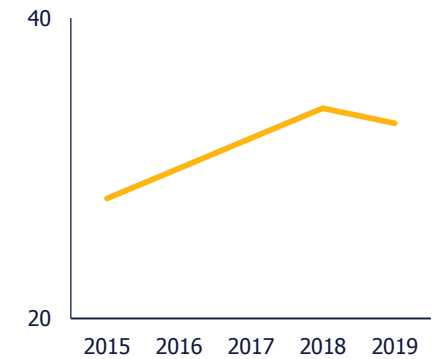
location



strong management



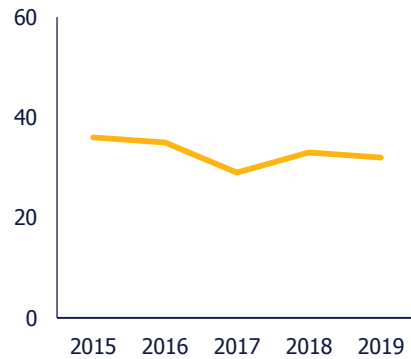
good training



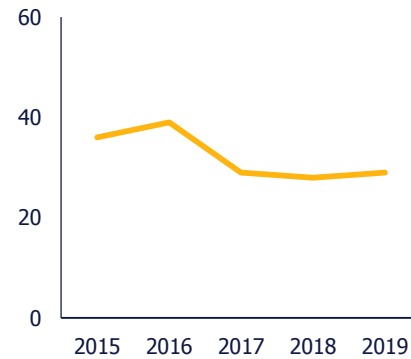
EVP driver importance trends, total.

2/2

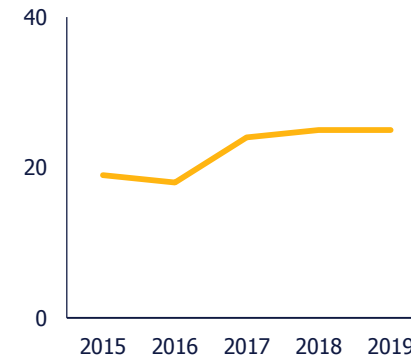
career progression



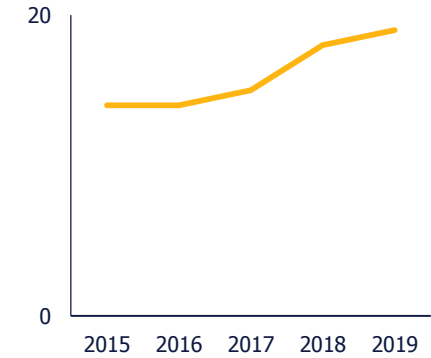
financially healthy



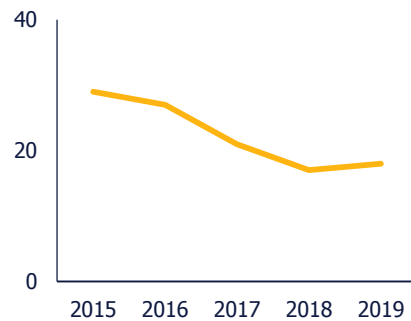
very good reputation*



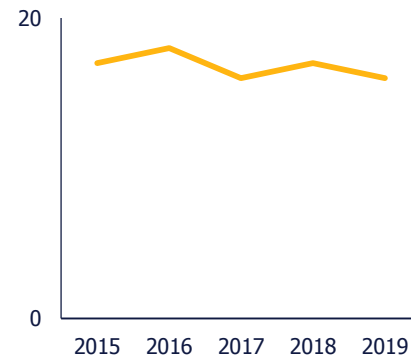
diversity & inclusion



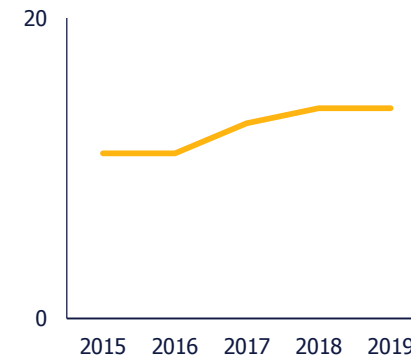
interesting job content**



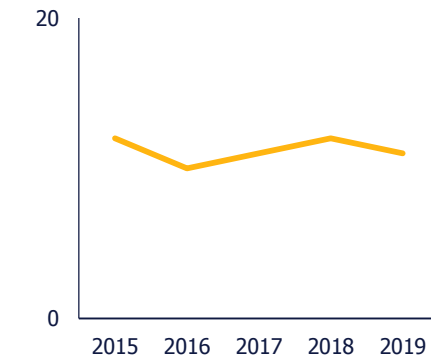
quality products



gives back to society



uses latest technologies

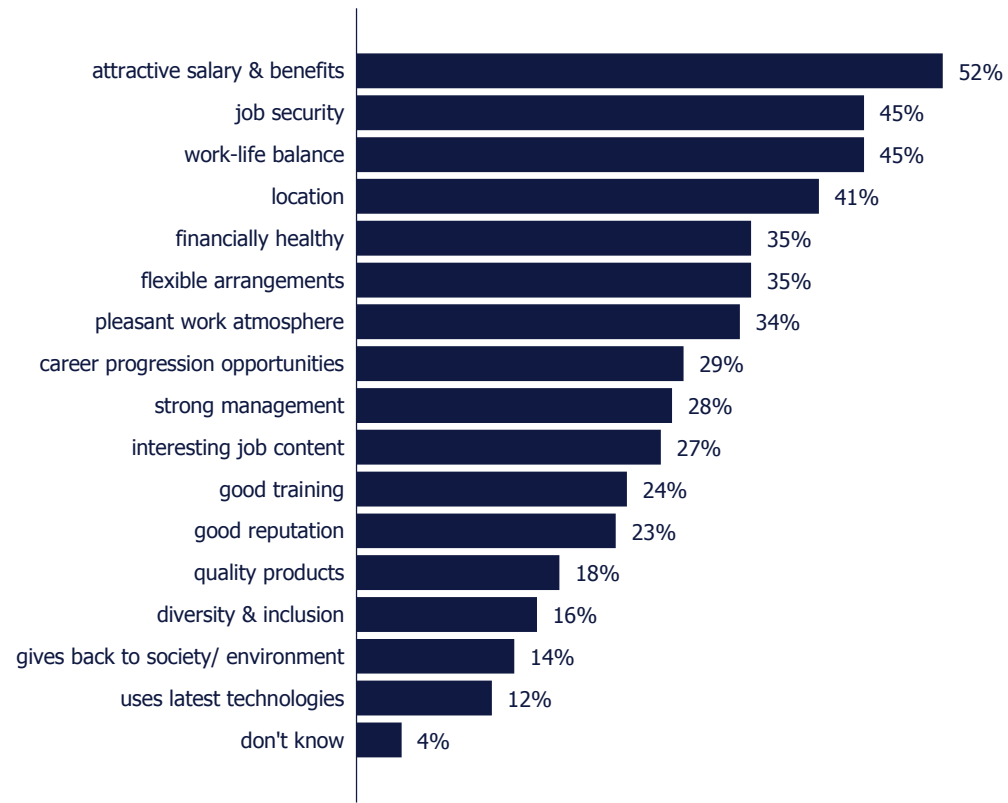


*previous to 2017: strong image/strong values
 **2017: work that is stimulating and challenging



what factors do the americans 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

- Ipien 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.

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randstad

human forward.

