

# employer brand research 2020



australia.

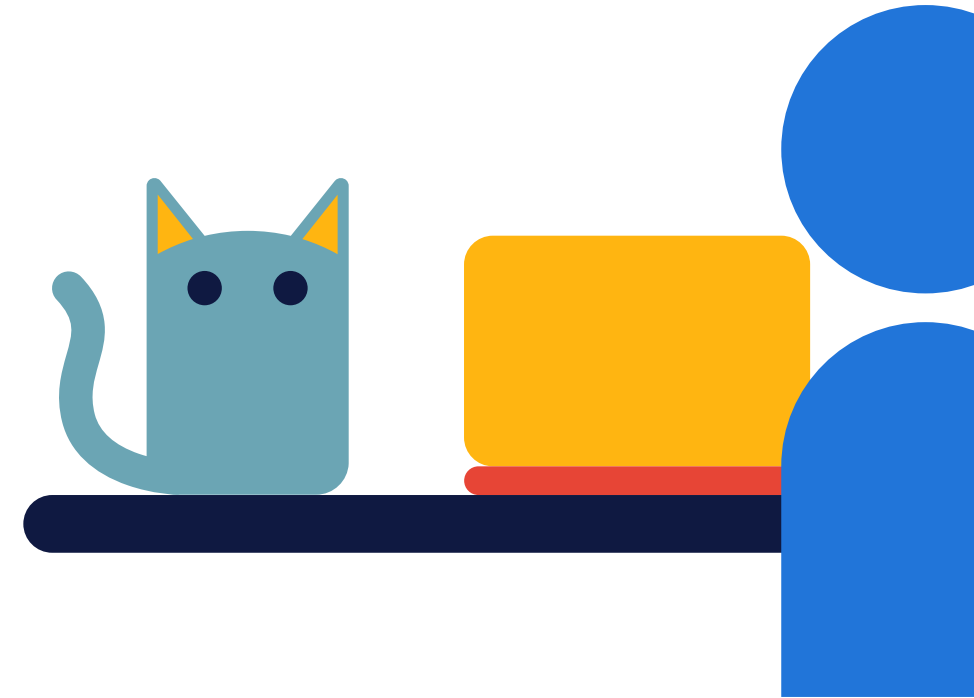
 randstad

human forward.

# foreword

As we publish this year's Randstad Employer Brand Research, we are fully aware of the new situation we are in as a result of COVID-19. In Australia, we surveyed workers in January and May to track the impact of COVID-19 on employer brand. COVID-19 has paralyzed local economies and labor markets and as a result several companies find themselves facing unprecedented challenges.

In these uncertain times, employer branding is more important than ever. This year's Randstad Employer Brand Research results can be very helpful in building on a sharpened employer branding strategy for your company.



# content.

- 1 introduction
- 2 results
- 3 sector insights
- 4 top employers
- 5 deep dive
- 6 methodology



# introduction.



# why employer branding matters.



Companies are overpaying on salaries by 10% if they don't have a strong brand.<sup>1</sup>

50%

of candidates say they wouldn't work for a company with a bad reputation – even with a pay increase.<sup>2</sup>

96%

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

80%

of workforce leaders agree that a strong employer brand has a significant impact on their ability to hire great workforce.<sup>4</sup> As people work for cultures, not companies, their perception of you as an employer is of paramount importance. Both recruiters and candidates cite company culture as one of the most important determinants in employer choice. Also, if your culture is transparent: candidates actively research the culture of companies to understand if they'll fit. If candidates see positive employee and candidate experiences on review sites, they feel more confident submitting their resume and making a career move.

19%

Only 19% of employees globally perceive a strong alignment between what their employer says about itself and their experience working there.<sup>5</sup>

52%

52 % of candidates first seek out the company's website and social media to learn more about an employer.<sup>6</sup>

#1

#1 obstacle to candidates in the application process is not knowing what it's like to work at an organization.<sup>7</sup>

1-2x

Companies with a strong employer brand have a 1- 2 x faster time to hire.<sup>8</sup>

76%

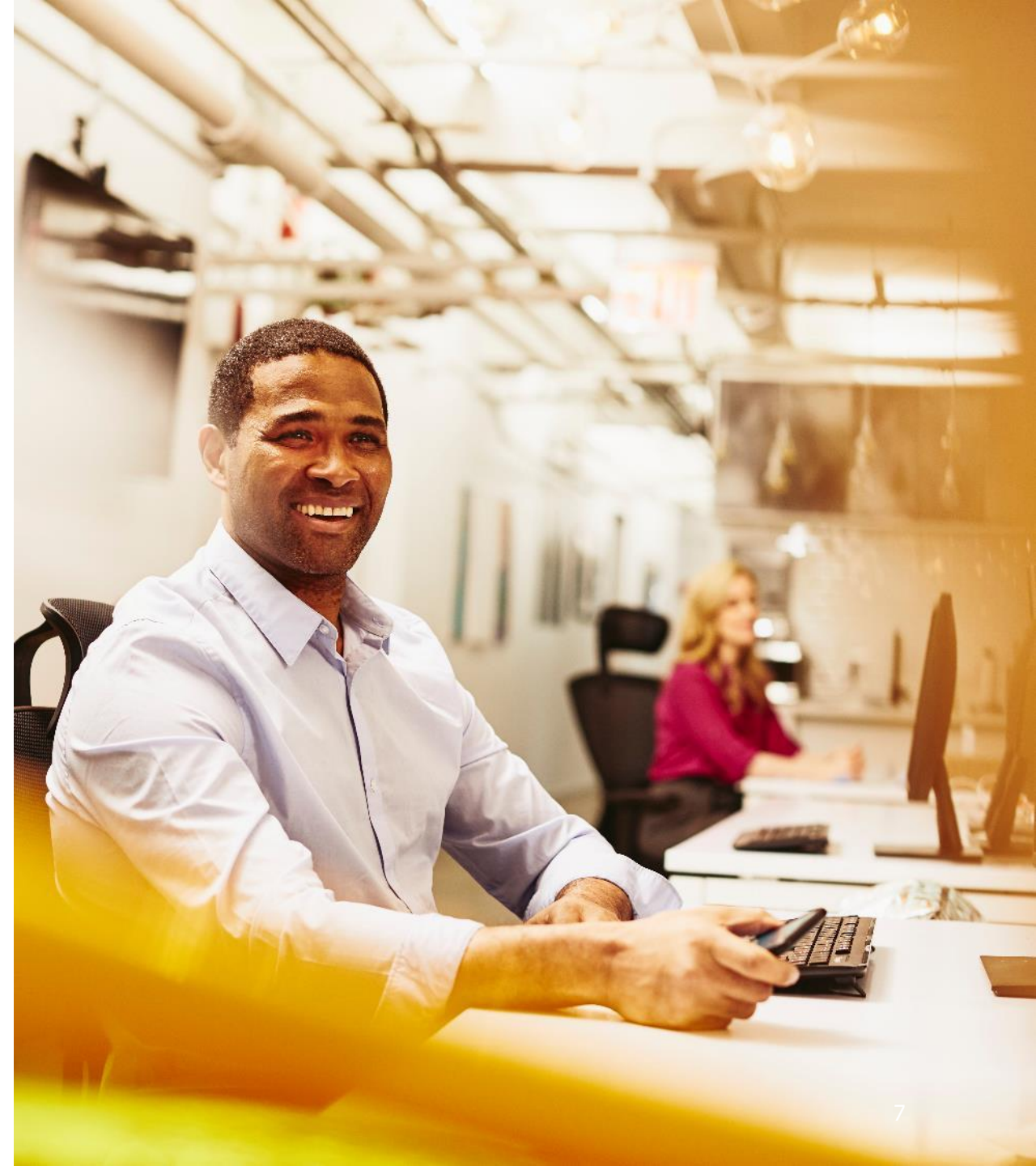
Employees who experience a strong alignment between what their employer says about itself and their experience working there are more likely to recommend their employer as a place to work.<sup>9</sup>

# the employer brand roadmap.



# what is the randstad employer brand research?

- a representative employer brand research based on perceptions of the general audience. Optimizing over 20 years of successful employer branding insights.
- an independent survey with nearly 185,000 respondents in 33 markets worldwide.
- the market's 150 largest employers known by a reflection of employer attractiveness for at least 10% of the population.
- provides valuable insights to help employers shape their employer brand.



# 33 markets surveyed covering more than 75% of the global economy.

Austria  
Australia  
Argentina  
Belgium  
Brazil  
Canada  
China  
Czech Republic  
France  
Germany  
Greece  
Hong Kong SAR  
Hungary  
Italy  
India  
Japan  
Kazakhstan  
Luxembourg  
Malaysia  
New Zealand  
Netherlands  
Norway  
Poland  
Portugal  
Romania  
Russia  
Singapore  
Spain  
Sweden  
Switzerland  
UK  
Ukraine  
USA



● markets surveyed

## worldwide

- nearly 185,000 respondents
- 6,136 companies surveyed

## sample

- aged 18 to 64
- representative on gender
- overrepresentation of age 25 – 44
- comprised of students, employed and unemployed workforce
- 9,494 respondents

## country

- online interviews
- between 3 and 30 january 2020

## fieldwork

- 16 minutes
- length of interview





# 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.

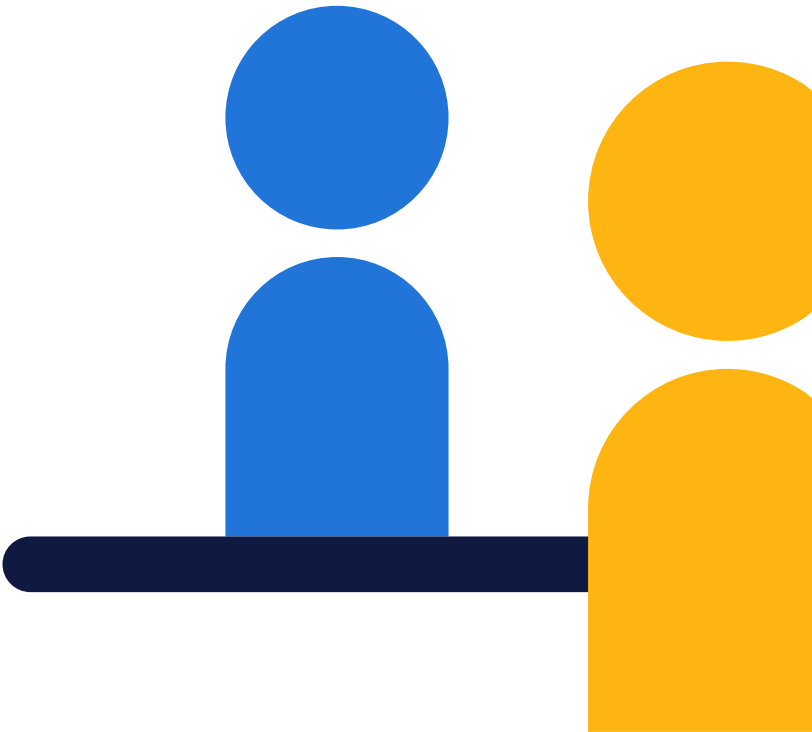
## drivers

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

For this research, Randstad partners with Kantar, one of the world's largest insight, information and consultancy networks.



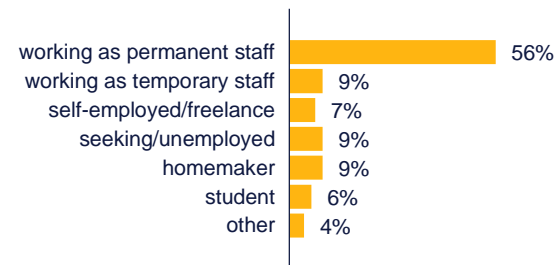
# sample composition in australia

## socio-demographics, employment status, region.

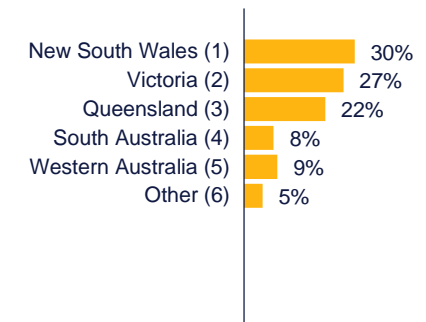
### gender



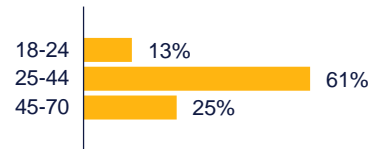
### employment status



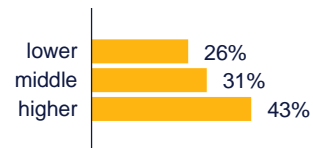
### region



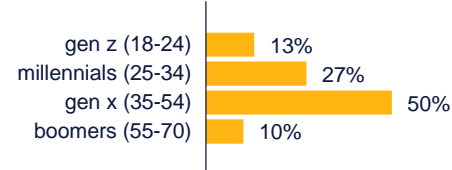
### age



### education



### generation



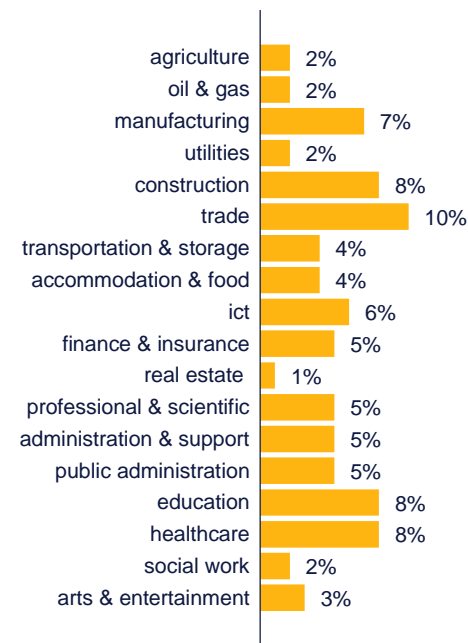
1. Sydney, Regional New South Wales
2. Melbourne, Regional Victoria
3. Brisbane, Regional Queensland
4. Adelaide, Regional South Australia
5. Perth, Regional Western Australia
6. Tasmania, Northern Territory, Australian Capital Territory

total sample: 9,494  
fieldwork: between 3 and 30 january 2020

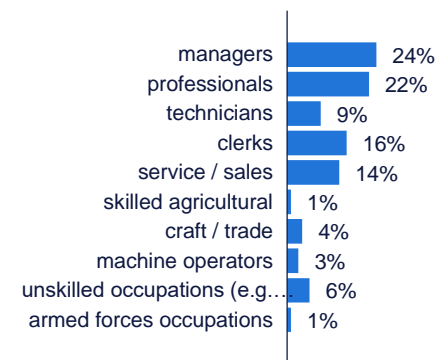


# sample composition in australia.

## sector



## function

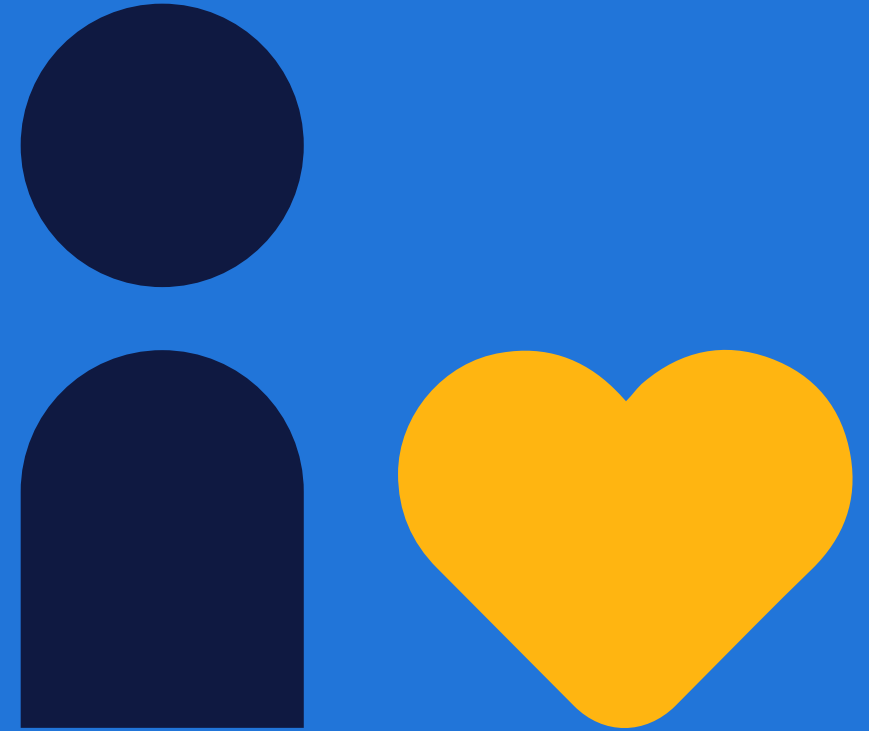


base: currently employed (n=6,831)



# australia

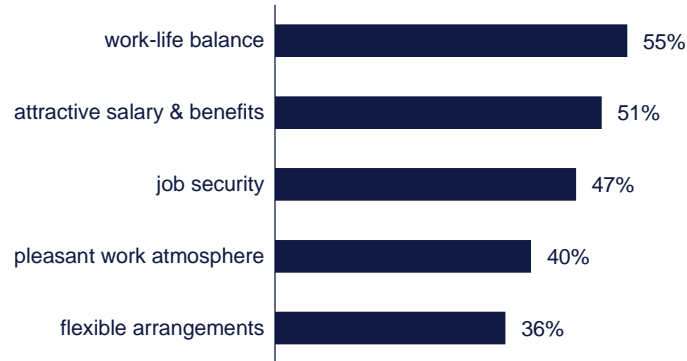
## EVP drivers.



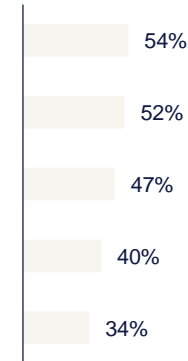
# what potential employees want when choosing an employer.

## most important criteria

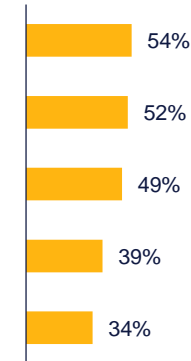
australia 2020



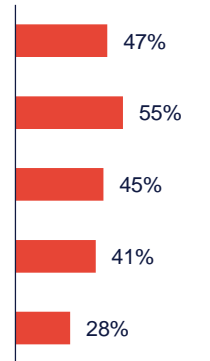
australia  
2019



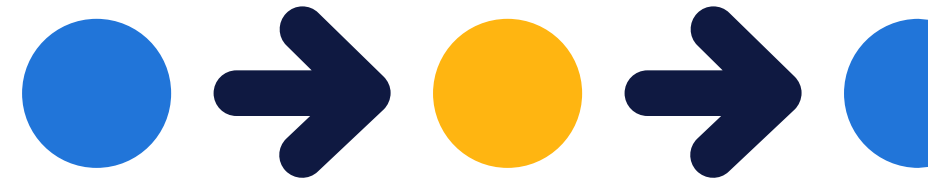
australia  
2018



apac  
2020



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



# perception of employer offer in australia.

Understanding the gap between what employees want and what they think employers offer provides valuable insights into building an employer brand. Furthermore, benchmarking against what employees perceive being offered by their current employer gives more context to the gaps that need to be bridged.

## evaluation of current employer.

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

## general perception of employers in australia.

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

## profile of ideal employer.

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

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

Employers in a market 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.

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## gap top 3

work-life balance

attractive salary & benefits

pleasant work atmosphere

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# what do potential employees want by generational profile.

gen z (18-24)

## 46%

of the gen z's are looking for good training opportunities in their employer. This is higher when compared to the older workforce (millennials – 38%, gen x – 32% and boomers – 30%).

gen x (35-54)

## 59%

of the gen x's find a good work-life balance a very important pull factor towards an employer. Among other generations, this factor is deemed less important (gen z – 48%, millennials – 54% and boomers – 52%).

millennials (25-34)

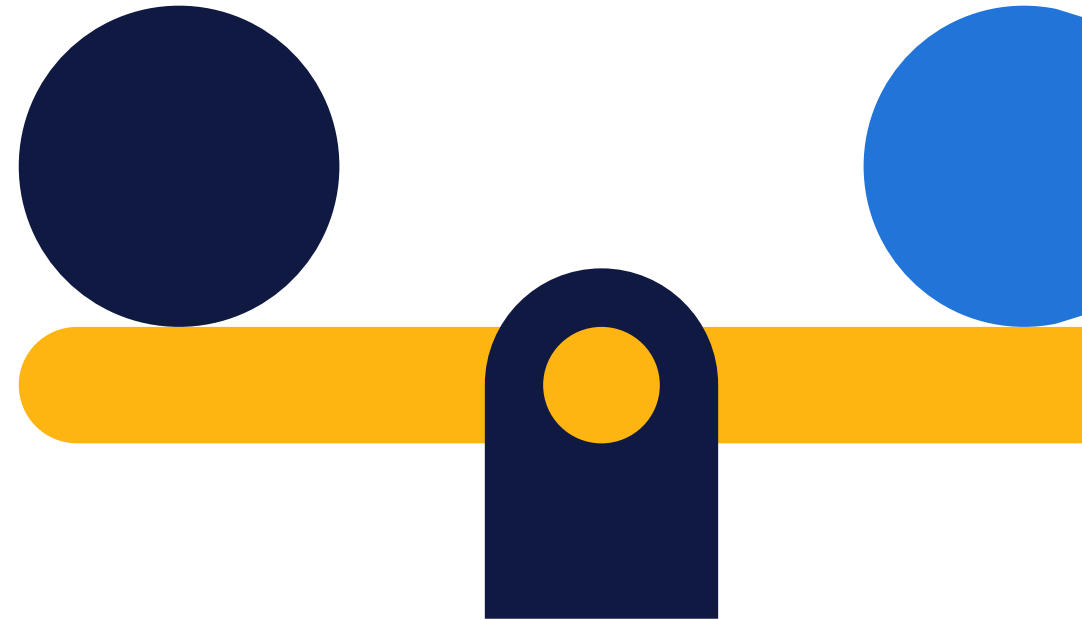
## 38%

of the millennials seek career opportunities. Other generations are less interested in this offering from their employer (gen x – 31% and boomers – 21%).

boomers (55-70)

## 44%

of the boomers deem a pleasant work atmosphere as a very important attribute of an employer. This is less so among the other cohorts (gen z - 40%, millennials - 36% and gen x – 40%).



[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.



25%

of today's workforce  
works part-time.  
(less than 30 hours per week)



## most important attributes



# switchers and stayers

in focus.



# changing employer australia 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.



# most important attributes switchers vs stayers.

## switchers

2019

23%



2020

19%

changed employer in the  
past year.

## stayers

2019

77%

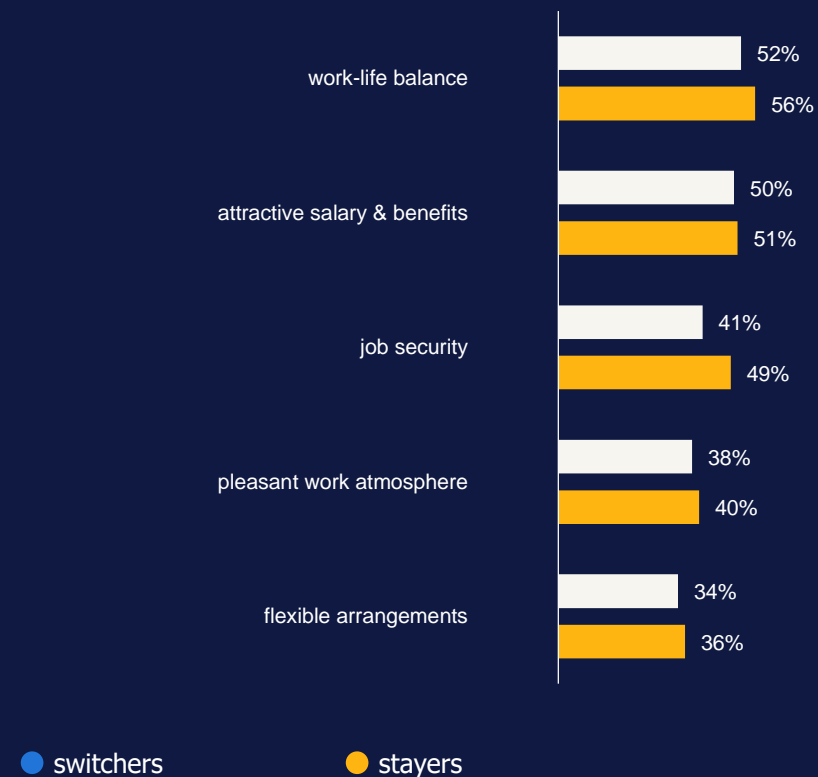


2020

81%

stayed with their employer in  
the past year.

## most important attributes



# most important attributes intenders.

intenders

2019

30%

→

2020

29%

plan to change employer  
within the next year.

## most important attributes among intenders



● 2020

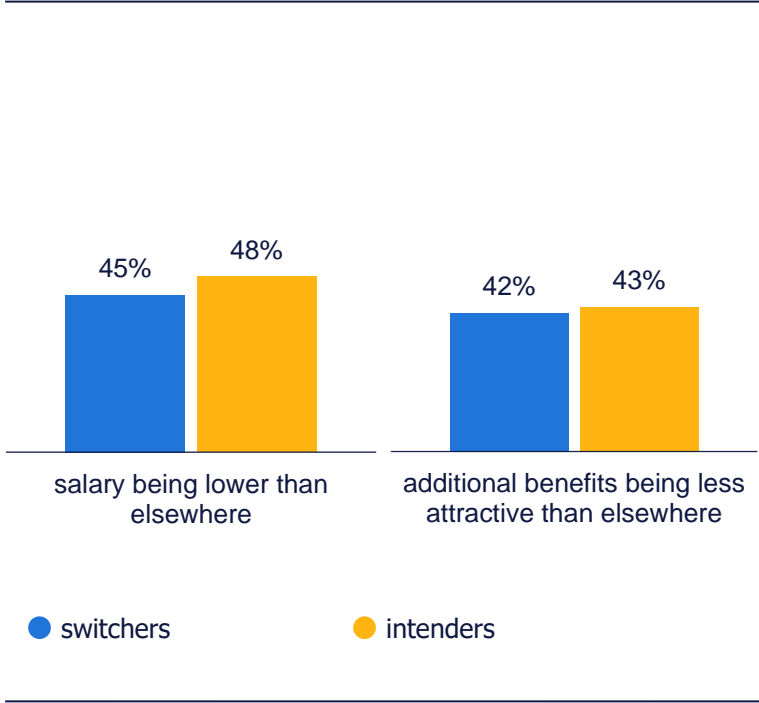
● 2019



# switchers vs intenders

## financial reasons.

% (completely) agrees with the statement  
"I changed my job or plan to do so" because of:



australia

47%

is leaving or planning to do so because of a lower salary compared to elsewhere.

apac

64%

is leaving or planning to do so because of a lower salary compared to elsewhere.

42%

is leaving or planning to do so because of less attractive additional benefits compared to elsewhere.

64%

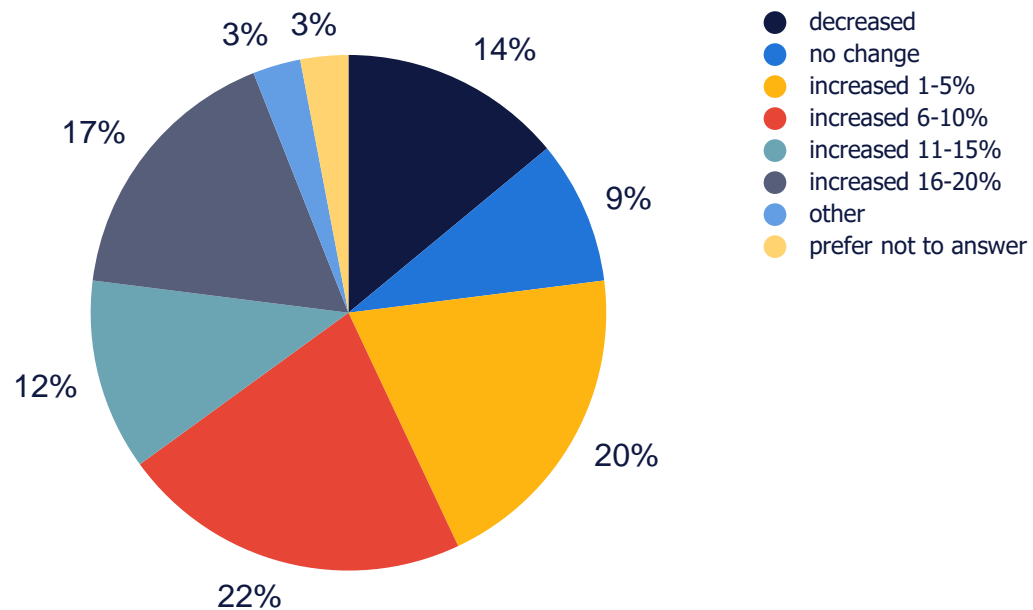
is leaving or planning to do so because of less attractive additional benefits compared to elsewhere.



# switching for higher salary

## nearly 1 in 2 switchers gets a 1 to 10% pay increase.

salary change after switch



### australia

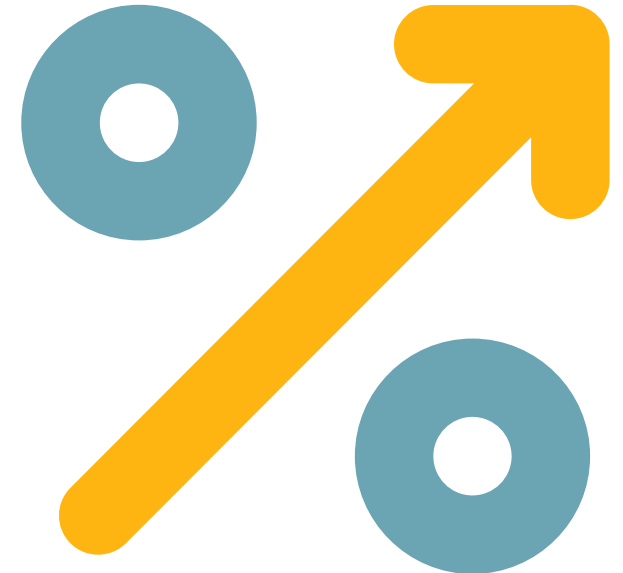
42%

employees who left previous employer for a higher salary elsewhere saw a salary increase between 1% and 10%.

### apac

47%

employees who left previous employer for a higher salary elsewhere saw a salary increase between 1% and 10%.



# switchers vs intenders

## emotional reasons.

australia

60%

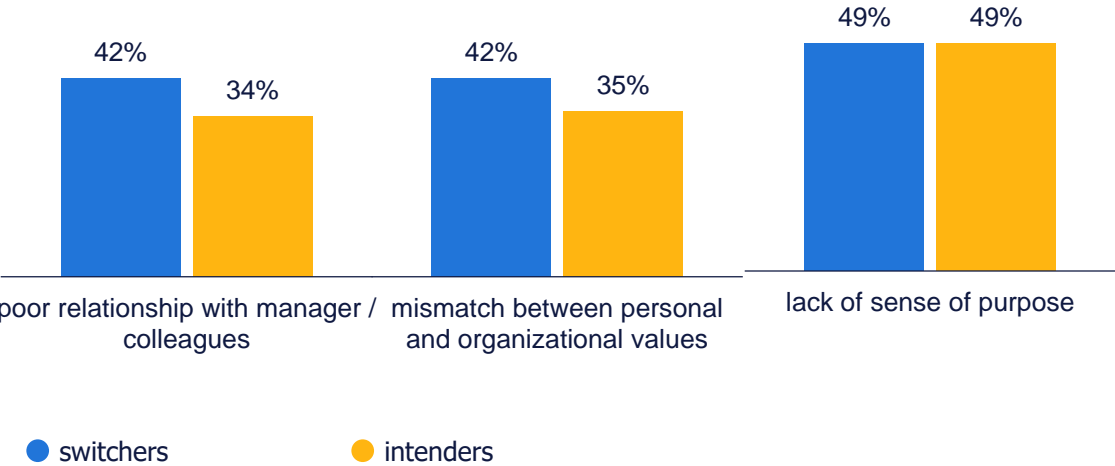
find non-monetary benefits important.

apac

76%

find non-monetary benefits important.

% (completely) agrees with the statement  
"I changed my job or plan to do so" because of:





# reasons to leave by profile.

salary being lower than elsewhere

51%

of the **millennials** are likely to leave an employer if they receive a higher salary elsewhere. This is higher when compared to **gen z (43%)** and **boomers (39%)**.

additional benefits being less attractive

45%

of the **millennials** are likely to leave their employer if additional benefits offered by other employers are more attractive. This is higher when compared to **gen z (40%)** and **boomers (30%)**.

poor relationship with manager

37%

of the **gen x** agree that a poor relationship with their manager is a serious reason to consider working elsewhere. This is higher when compared to **gen z (31%)**.

mismatch between personal and organizational values

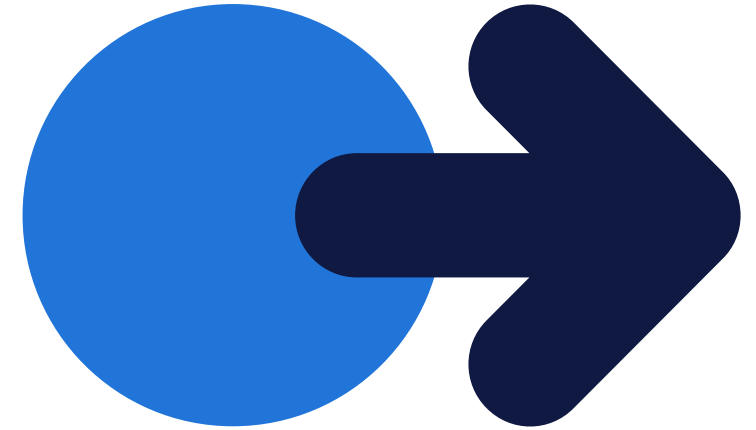
38%

of the **gen x and millennials** would leave their employer if the organizational values do not match their personal values. This is higher when compared to **gen z (31%)**.

lack of sense of purpose

50%

of the **gen x** may leave or have left their employer if they lack a sense of purpose in their job. This is higher when compared to **boomers (44%)**.



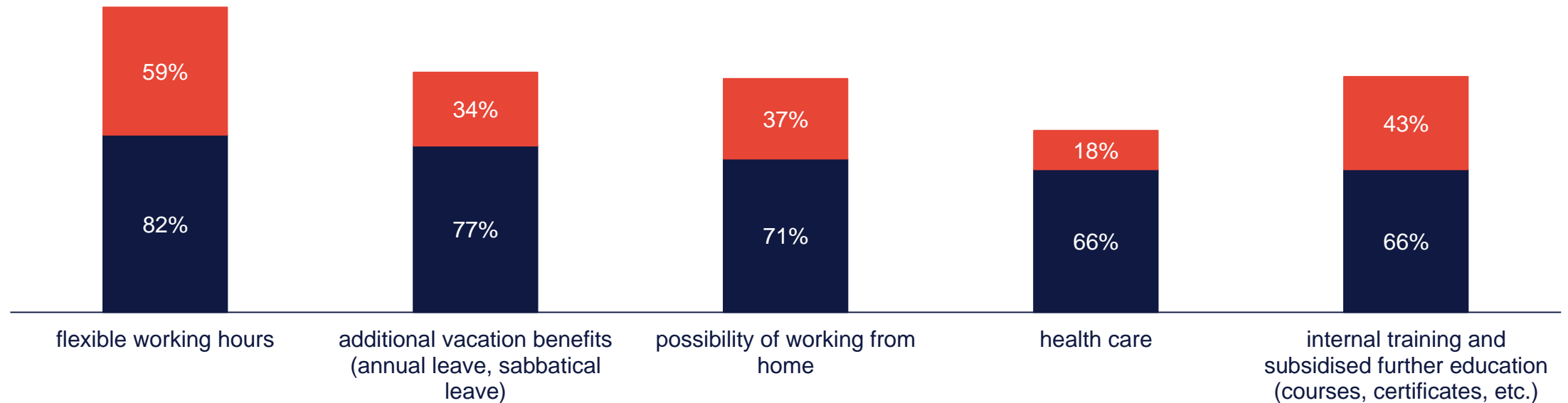
additional  
benefits

in focus.



# employee benefits that workforce in australia finds attractive and are received.

top 5 most attractive benefits & received



● attractive ● attractive & received

[click here](#) for full results.



# most attractive benefits by profile.

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gen z (18-24)

57%

of the gen z's find travel insurance attractive as an employment benefit. This is higher when compared to millennials (50%), gen x (38%) and boomers (34%).

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gen x (35-54)

72%

of the gen x's find the possibility of working from home attractive as an employment benefit. This is higher when compared to boomers (61%).

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millennials (25-34)

50%

of the millennials find the opportunity to buy company shares attractive as an employment benefit. This is higher when compared to gen z (41%), gen x (44%) and boomers (38%).

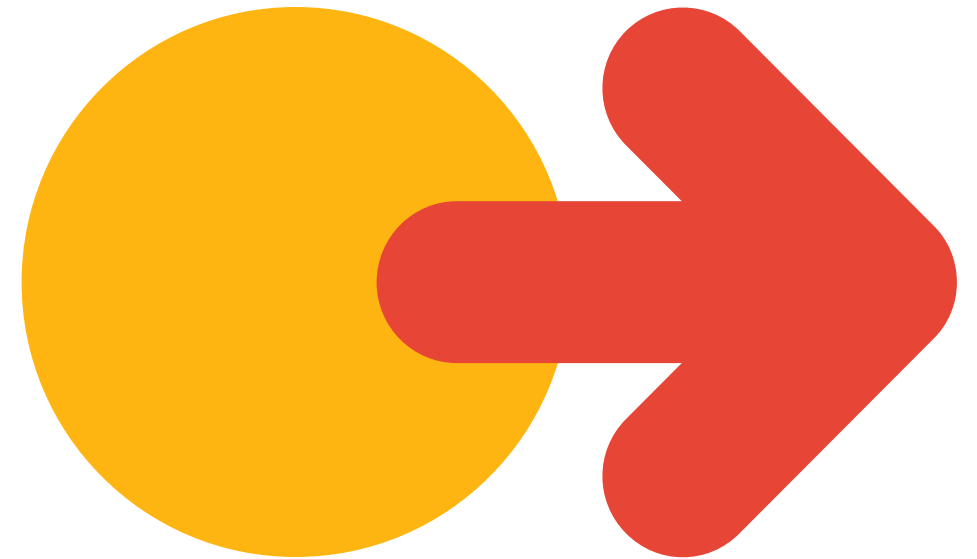
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boomers (55-70)

83%

of the boomers find flexible working hours attractive as an employment benefit.

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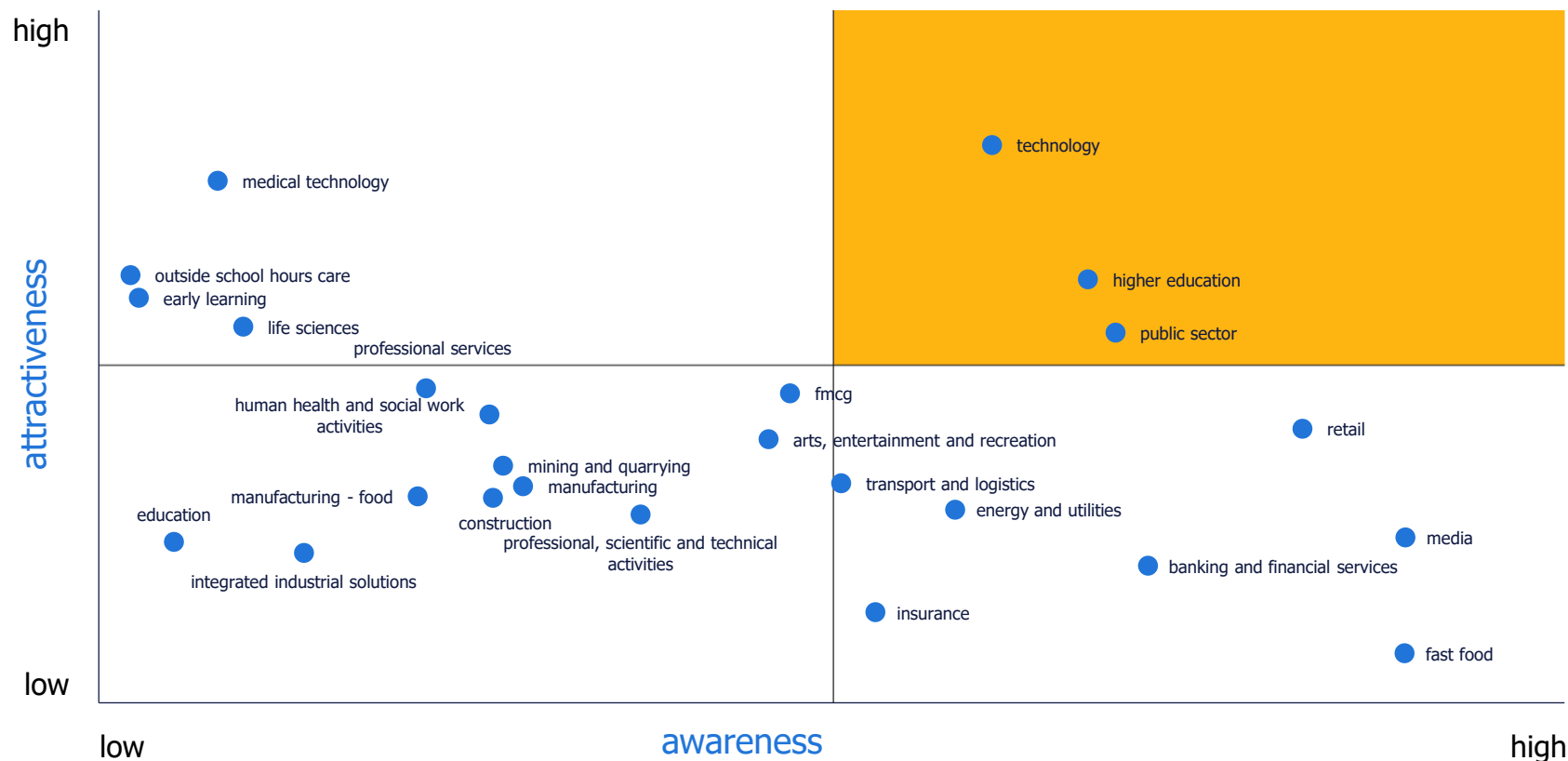


sector

insights.



# top performing sectors in australia 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.



# australia's best performing companies by sector.

1/3

sector	top 3 companies		
	1	2	3
01 technology	Apple	IBM	
02 medical technology			
03 outside school hours care	Centacare (Queensland)		
04 higher education	Australian National University	University Of Technology Sydney	The University of New South Wales
05 early learning	Goodstart Early Learning		
06 life sciences			
07 public sector	Federal Government	Australia Post	QLD Government
08 professional services	PWC	KPMG	ISS Global A/S
09 fmcg	Coca-Cola Amatil	Nestle Australia	Metcash Trading
10 human health and social work activities	Healthe Care Australia	Australian Red Cross Society	Silver Chain Group Limited

# australia's best performing companies by sector.

2/3

sector	top 3 companies		
	1	2	3
11 retail	Wesfarmers (brands incl Coles, Bunnings, Kmart)	JB Hi-Fi Limited	Coles
12 arts, entertainment and recreation	Australian Leisure and Hospitality Group	The Star Entertainment Group Limited	Accor Asia Pacific
13 mining and quarrying	BHP Billiton - Group Functions	Alcoa	Rio Tinto
14 transport and logistics	Virgin Australia	QANTAS Airways	Metro Trains Melbourne Pty Ltd
15 manufacturing	Fletcher Building (Australia) Pty Ltd	BlueScope Steel	Hanson Australia
16 manufacturing - food	George Weston Foods	JBS Australia	Inghams Enterprises
17 construction	CIMIC (brands incl CPB, Theiss, Leightons)	Downer EDI	UGL
18 energy and utilities	Ausgrid	Energy Queensland Limited	BP Australia
19 professional, scientific and technical activities	Infosys Technologies Limited		
20 media	Australian Broadcasting Corporation	Optus	Telstra Corporation



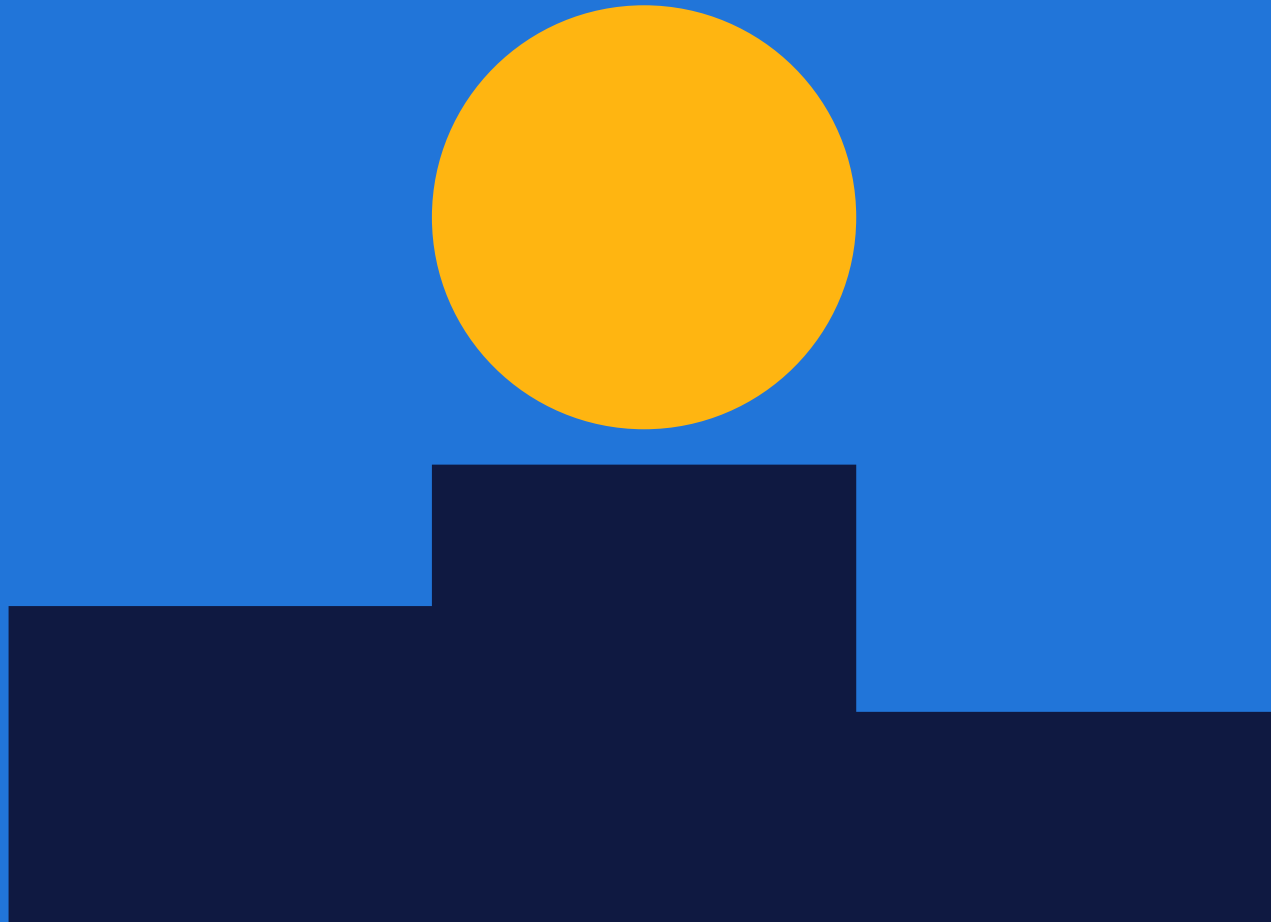


# australia's best performing companies by sector.

3/3

sector	top 3 companies		
	1	2	3
21 education	Catholic Education Office	Sydney Catholic Schools	
22 integrated industrial solutions	Menzies International (Aust.) Pty. Ltd.	Broadspectrum	Sodexo Australia Pty Limited
23 banking and financial services	Macquarie Group Limited	Bendigo & Adelaide Bank	Commonwealth Bank
24 insurance	Suncorp	IAG	Allianz
25 fast food	Competitive Foods Australia	McDonald's Australia	KFC

top



employers.

# top employers to work for in australia.

## top 10 employers 2020

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- 01 Healthe Care Australia
  - 02 Wesfarmers (brands incl Coles, Bunnings, Kmart)
  - 03 Virgin Australia
  - 04 Australian National University
  - 05 PWC
  - 06 Competitive Foods Australia
  - 07 University Of Technology Sydney
  - 08 Apple
  - 09 George Weston Foods
  - 10 QANTAS Airways
- 

## top 10 employers 2019

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- 01 QANTAS Airways
  - 02 Epworth Foundation
  - 03 Apple
  - 04 PWC
  - 05 TAS Government
  - 06 Infosys Technologies Limited
  - 07 University Of Melbourne
  - 08 Virgin Australia
  - 09 Australian Broadcasting Corporation
  - 10 Royal Melbourne Institute of Technology
-

# australia's top 3 EVP drivers of the top 5 companies.

top 5 companies	1	2	3
1    Healthe Care Australia	financially healthy	job security	uses latest technologies
2    Wesfarmers (brands incl Coles, Bunnings, Kmart)	financially healthy	uses latest technologies	very good reputation
3    Virgin Australia	uses latest technologies	financially healthy	very good reputation
4    Australian National University	uses latest technologies	very good reputation	financially healthy
5    PWC	financially healthy	attractive salary & benefits	career progression

# australia's top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	Apple	Rio Tinto	BHP Billiton - Group Functions
career progression	BHP Billiton - Group Functions	SA Government	PWC
financially healthy	Apple	BHP Billiton - Group Functions	Coca-Cola Amatil
gives back to society	Australian Red Cross Society	Salvation Army	Endeavour Foundation Ltd
interesting job content	Apple	University Of Technology Sydney	Australian Broadcasting Corporation
job security	SA Government	TAS Government	ACT Government
pleasant work atmosphere	University Of Technology Sydney	Royal Melbourne Institute of Technology	Apple
uses latest technologies	Apple	IBM	University Of Technology Sydney
very good reputation	Australian Red Cross Society	University Of Technology Sydney	Royal Melbourne Institute of Technology
work-life balance	The University of Queensland	Endeavour Foundation Ltd	Competitive Foods Australia

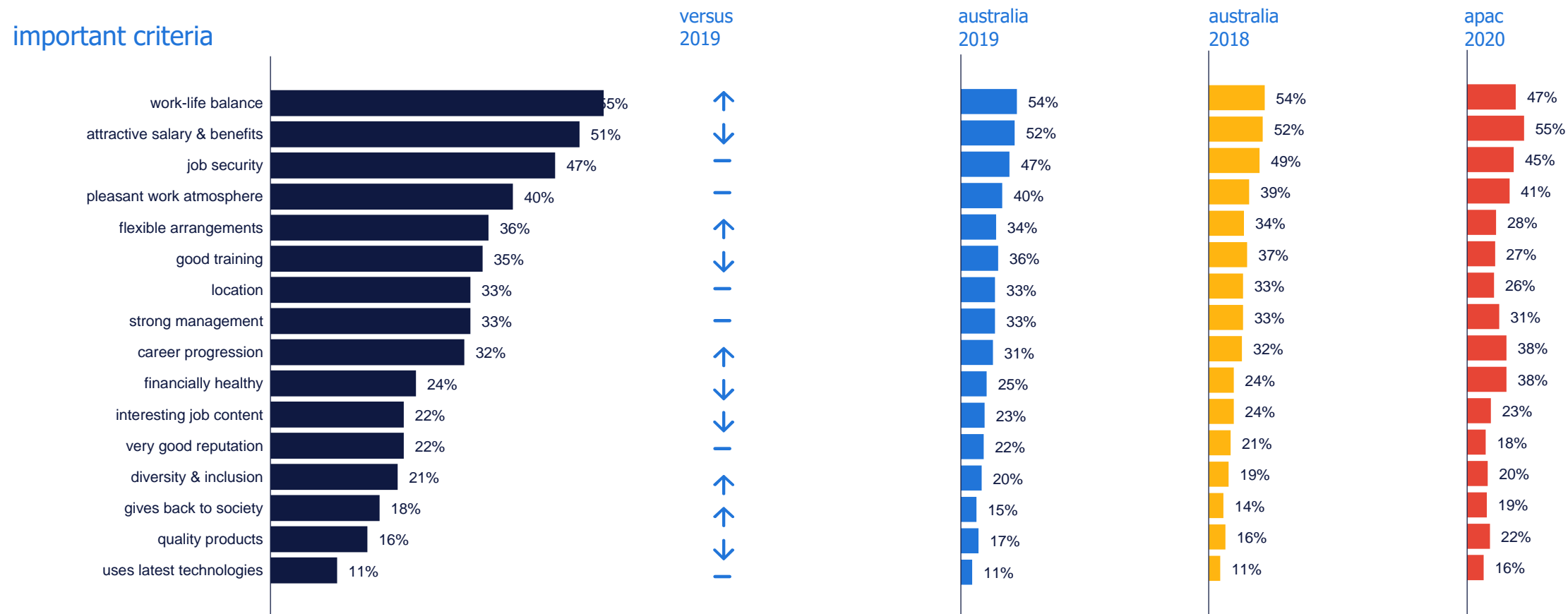
deep dive  
EVP drivers

2020 employer  
brand research.



# what potential employees want

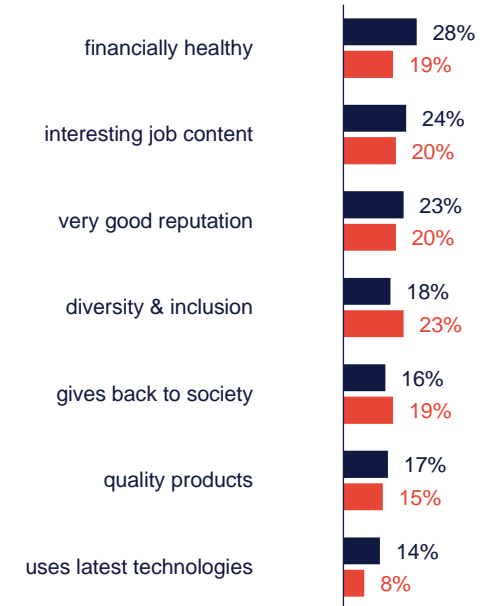
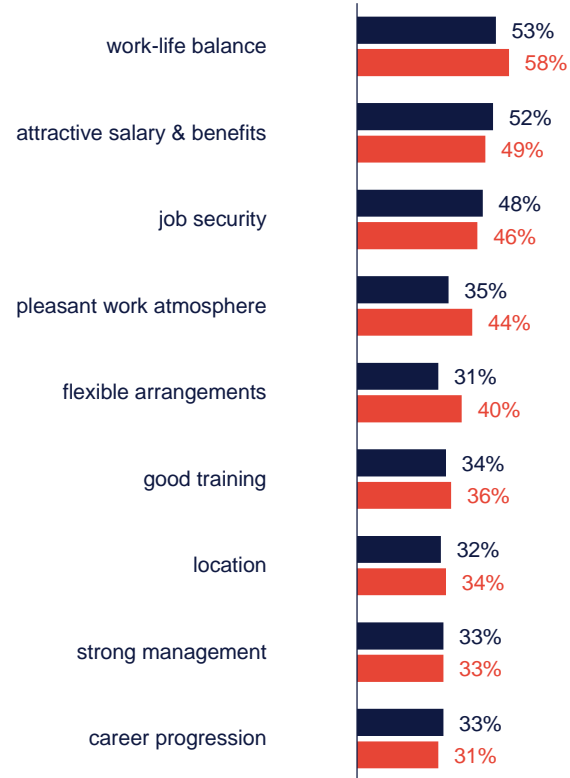
## the most important criteria when choosing an employer.



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.



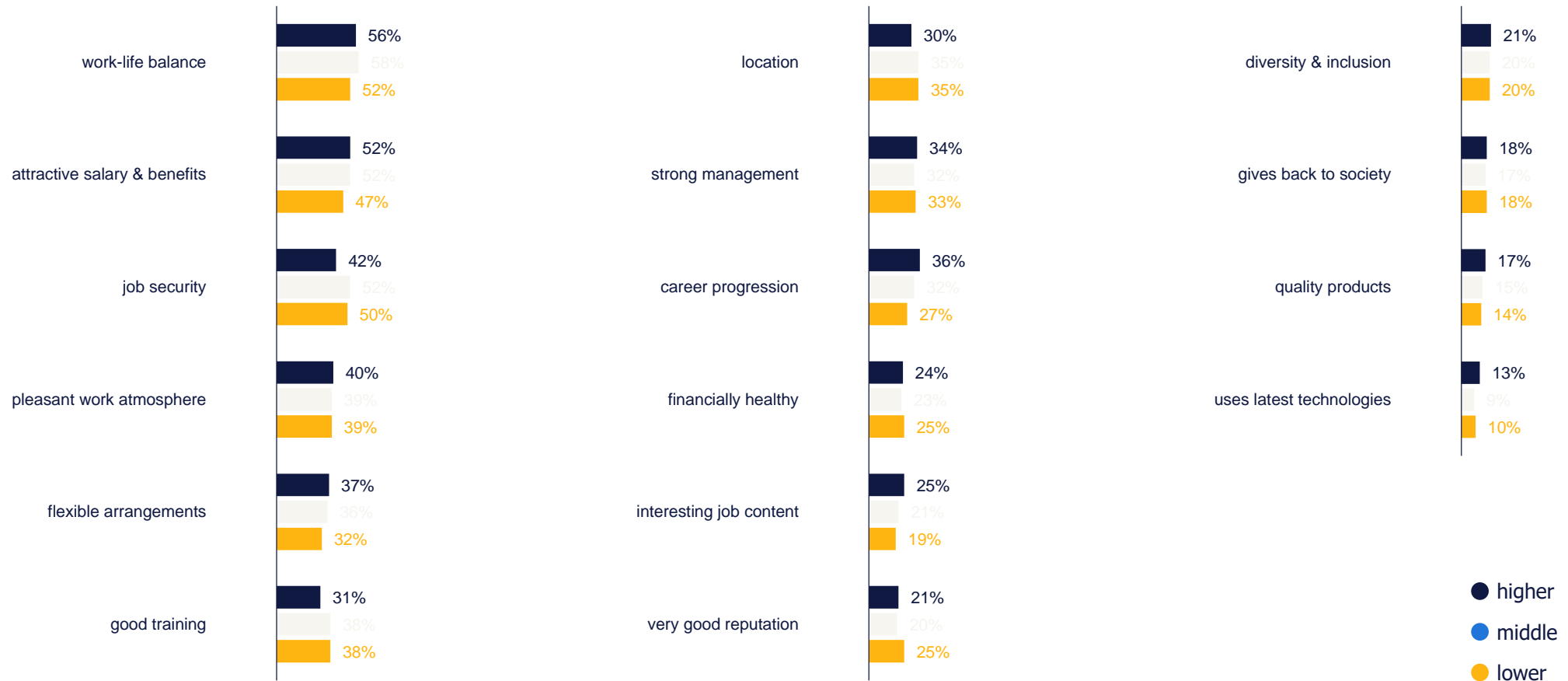
# EVP driver importance by gender.



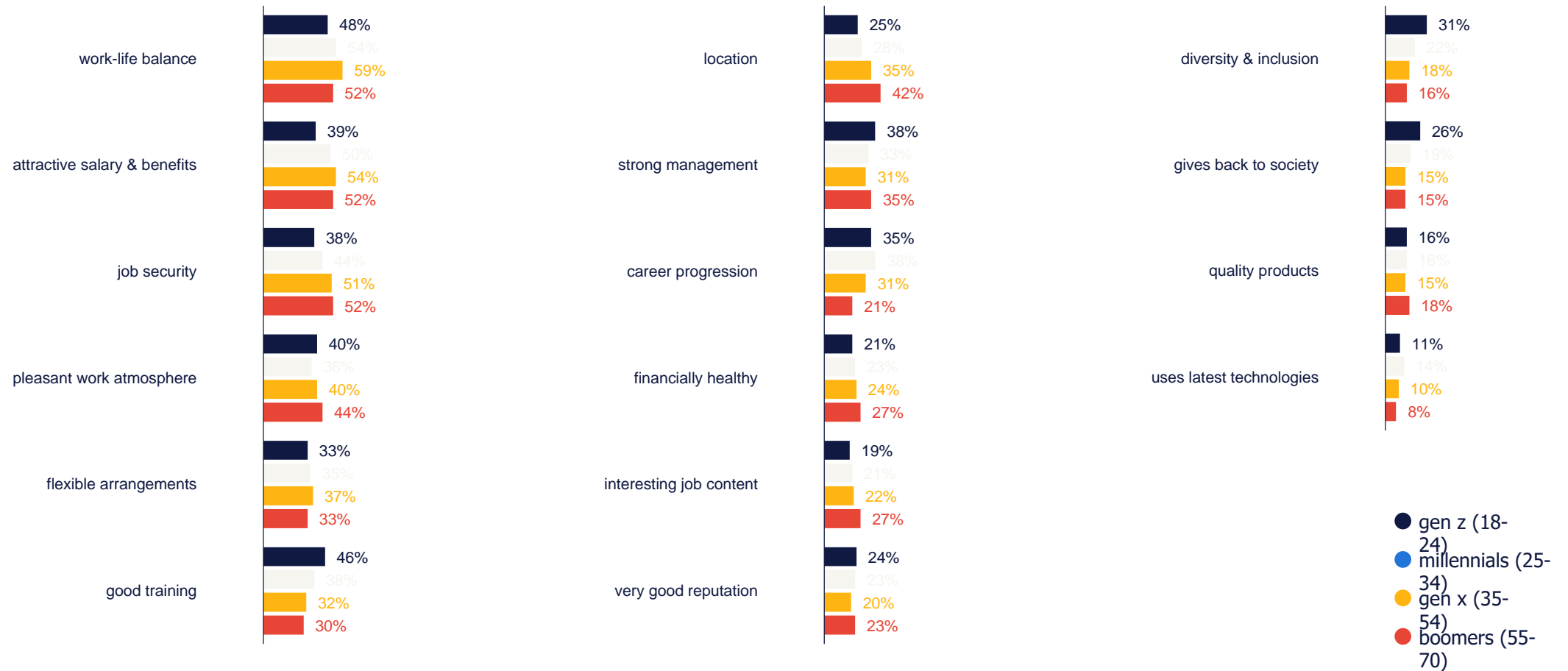
● male  
● female



# EVP driver importance by education.



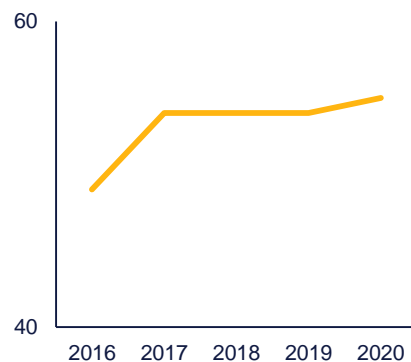
# EVP driver importance by age.



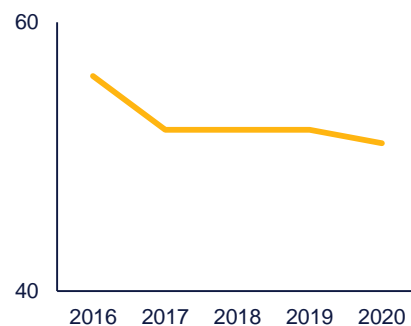
# EVP driver importance trends, total.

1/2

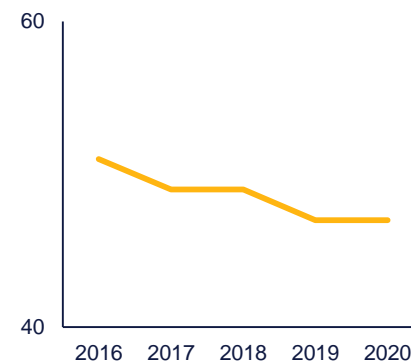
work-life balance



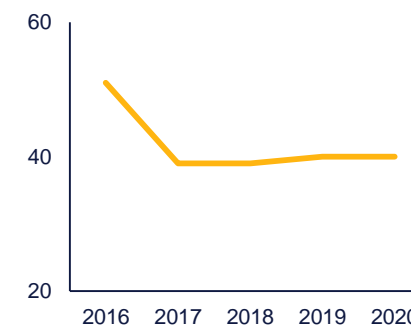
attractive salary & benefits



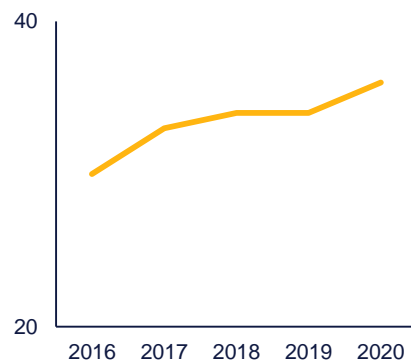
job security



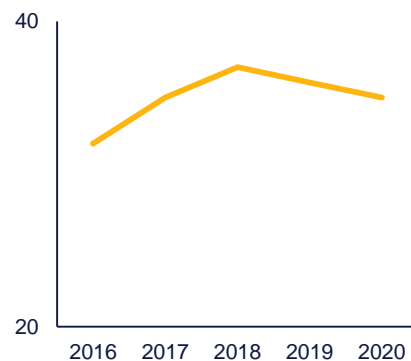
pleasant work atmosphere



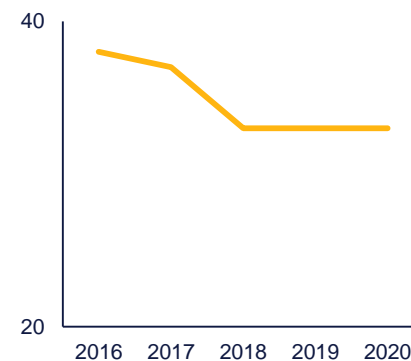
flexible arrangements



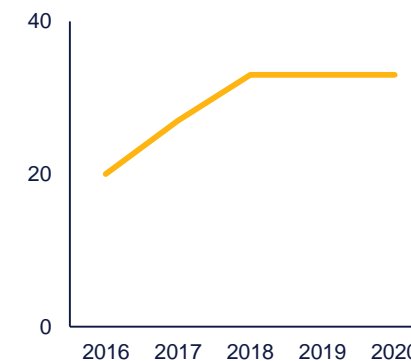
good training



location



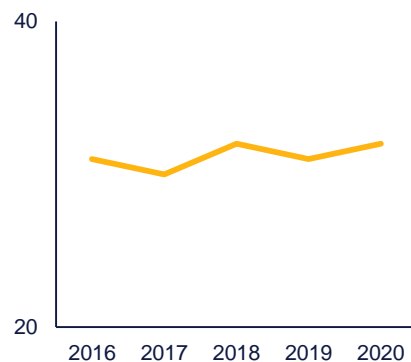
strong management



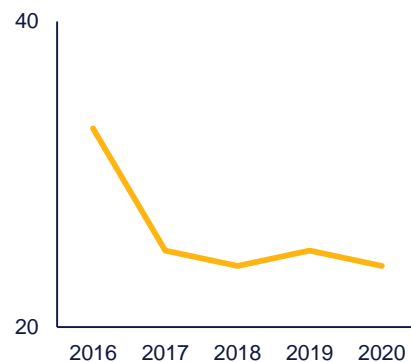
# EVP driver importance trends, total.

2/2

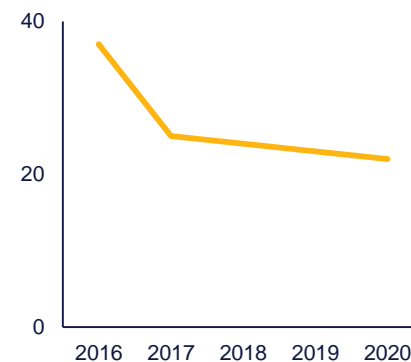
career progression



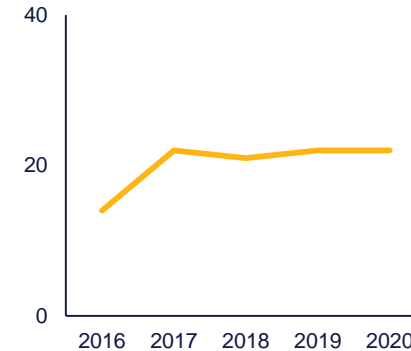
financially healthy



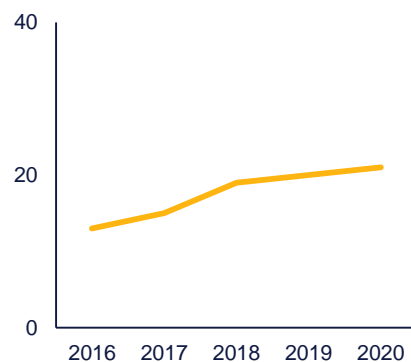
interesting job content\*



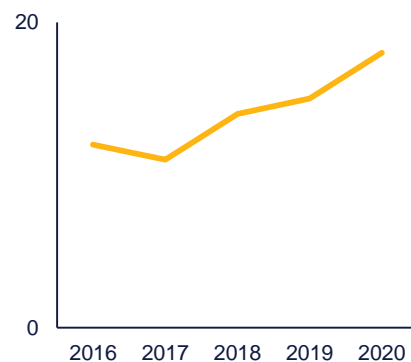
very good reputation\*\*



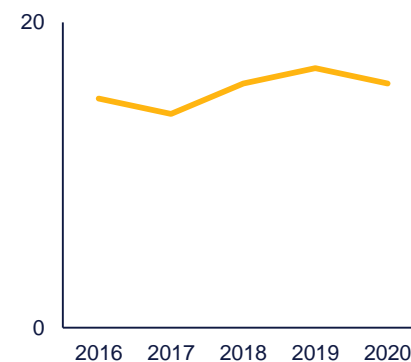
diversity & inclusion



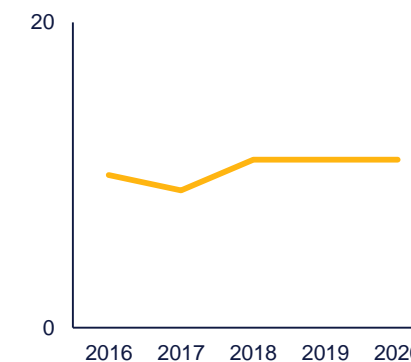
gives back to society



quality products



uses latest technologies



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



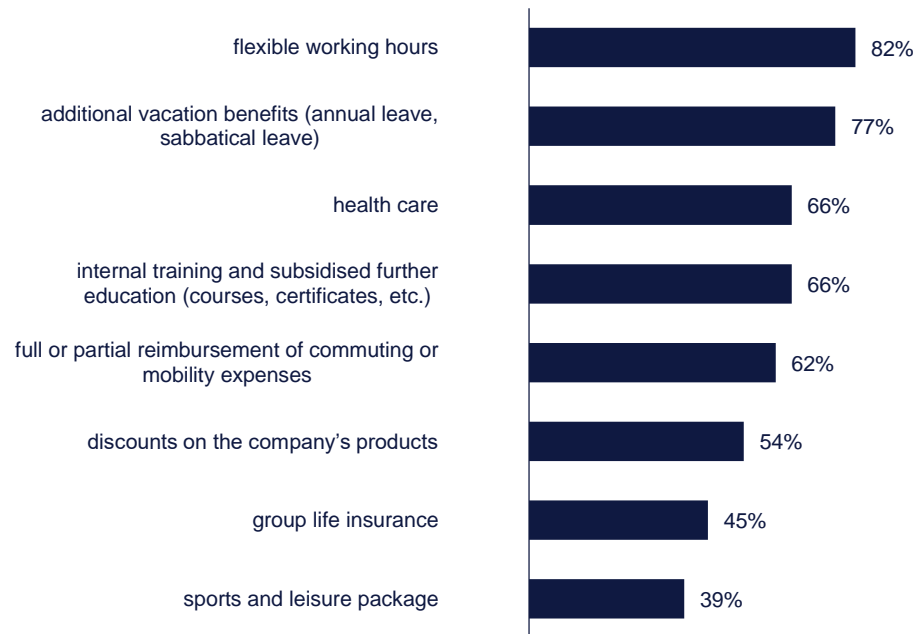
deep dive  
employers



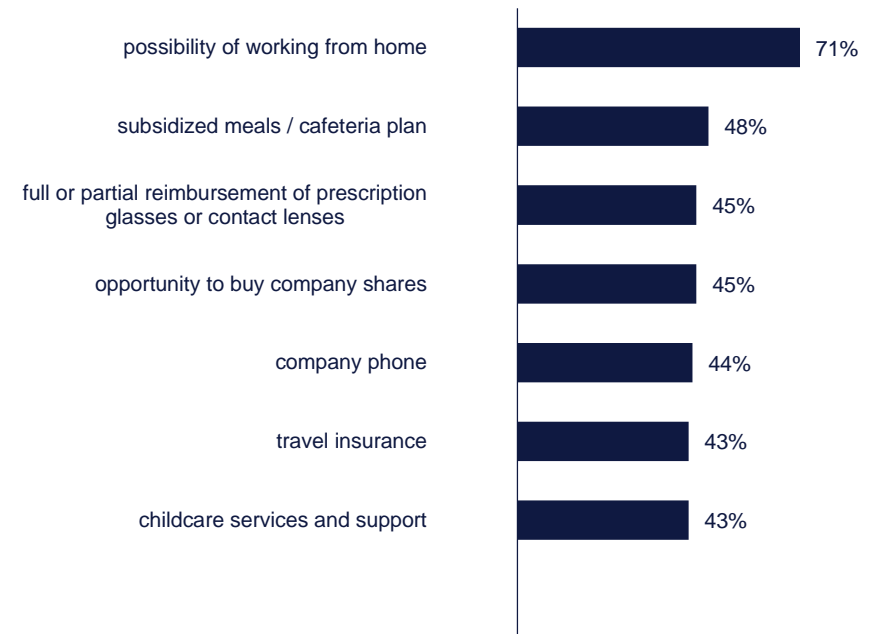
2020 employer  
brand research.

# employee benefits that australians find attractive.

## attractive benefits



● attractive (n=3,048)



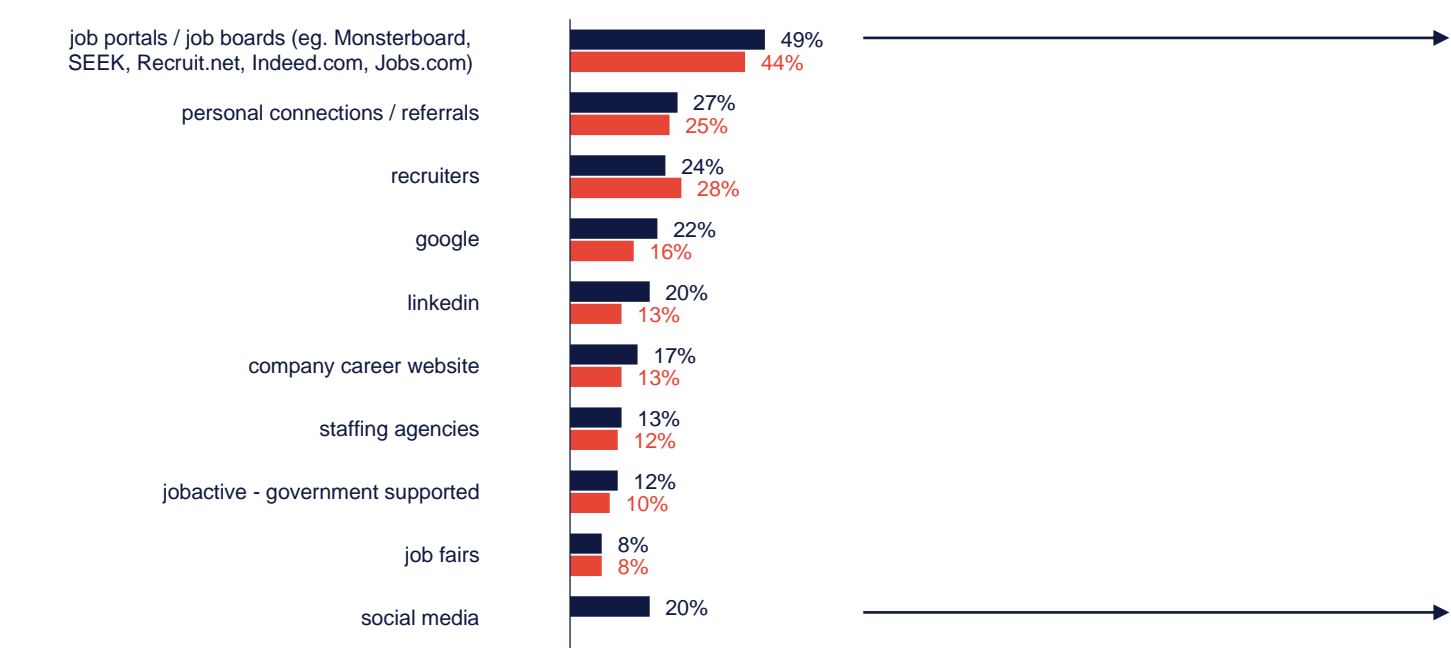
● attractive (n=3,072)

\*the 15 benefits were shown randomly in two sets of 8 and 7 benefits, respectively, each set shown to 50% of the sample. For each bar chart, the base is respondents who are employed and received that particular set on the screen.

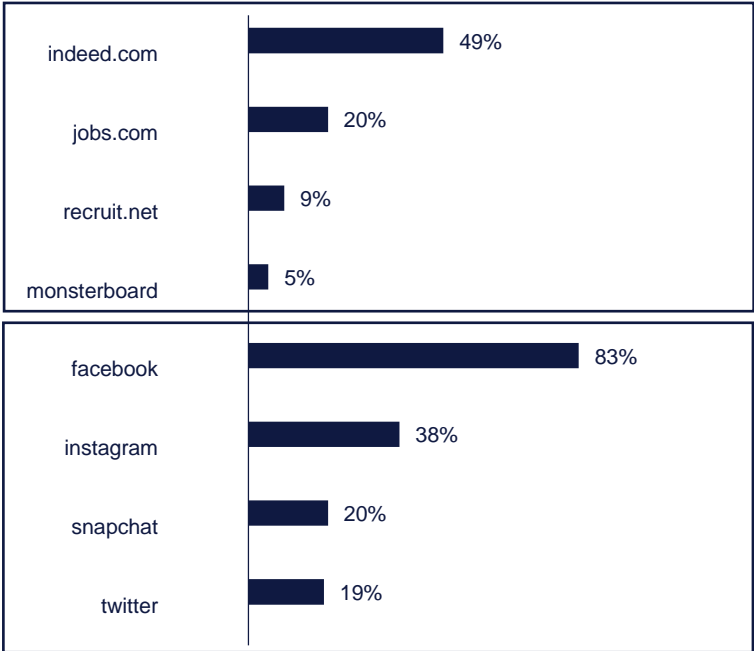


# how do workers in australia find new job opportunities.

channels used to find new job opportunities



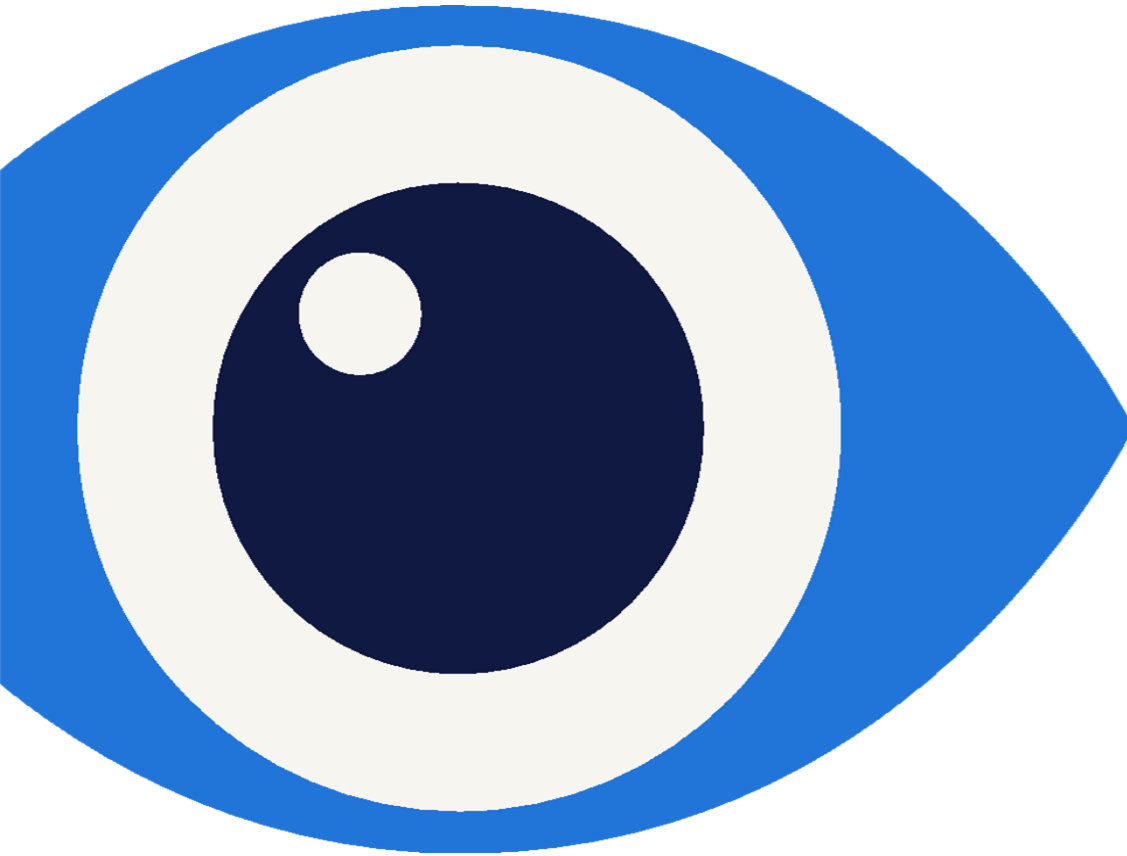
channels used to find new job opportunities  
deep dive social media & job portals



● 2020      ● 2019



# perception of employer offer in australia and the region.



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

## employers in australia are perceived to offer.

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

## employers in apac are perceived to offer.

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



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

1/2

	top 3 EVP drivers		
sector	1	2	3
01 technology	uses latest technologies	financially healthy	attractive salary & benefits
02 medical technology	uses latest technologies	financially healthy	attractive salary & benefits
03 outside school hours care	very good reputation	work-life balance	pleasant work atmosphere
04 higher education	uses latest technologies	financially healthy	very good reputation
05 early learning	very good reputation	pleasant work atmosphere	financially healthy
06 life sciences	financially healthy	uses latest technologies	career progression
07 public sector	financially healthy	job security	career progression
08 professional services	financially healthy	uses latest technologies	attractive salary & benefits
09 fmcg	financially healthy	very good reputation	uses latest technologies
10 human health and social work activities	financially healthy	very good reputation	job security



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

2/2

	top 3 EVP drivers		
sector	1	2	3
11 retail	financially healthy	uses latest technologies	very good reputation
12 arts, entertainment and recreation	financially healthy	uses latest technologies	career progression
13 mining and quarrying	financially healthy	uses latest technologies	attractive salary & benefits
14 transport and logistics	financially healthy	uses latest technologies	job security
15 manufacturing	financially healthy	uses latest technologies	very good reputation
16 manufacturing - food	financially healthy	uses latest technologies	very good reputation
17 construction	financially healthy	uses latest technologies	career progression
18 energy and utilities	financially healthy	uses latest technologies	job security
19 professional, scientific and technical activities	financially healthy	uses latest technologies	very good reputation
20 media	uses latest technologies	financially healthy	career progression

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

3/3

	top 3 EVP drivers		
sector	1	2	3
21 education	financially healthy	job security	work-life balance
22 integrated industrial solutions	financially healthy	uses latest technologies	career progression
23 banking and financial services	financially healthy	uses latest technologies	career progression
24 insurance	financially healthy	uses latest technologies	career progression
25 fast food	financially healthy	uses latest technologies	career progression



methodology

# 2020 employer brand research.

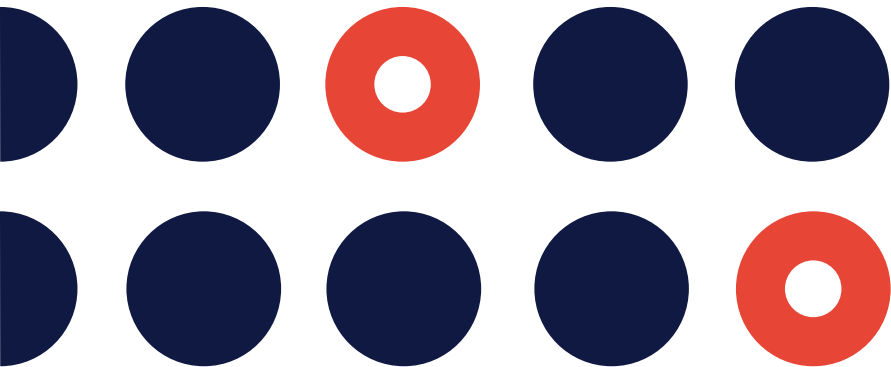


# methodology

## 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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<https://www.webershandwick.com/uploads/news/files/EmployerBrandCredibilityGap.pdf>

# 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

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- 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.

