global customer services & support professions report.

employer brand research 2021

randstad

human forward.

contents.

executive summary.

executive summary.

Over the past 12 months, the world in which we live has dramatically changed, yet despite this upheaval some things have remained the same, especially in the world of work. The findings from our employer brand study show that the customer services & support* workforce mostly continued to work as normal (52%), just as much as all working-age adults around the world (50%). However, almost 1 in 3 working adults in customer services & support worked longer hours, reduced hours or for a reduced salary in 2020 due to COVID-19. Compared to the global workforce, 6% of those in customer services & support became unemployed as a result of the pandemic (vs. 9% globally).

Working adults in customer services & support have a lower sense of job security when compared globally. Of those working in these areas, 31% fear job loss in 2021, compared to 26% among the global workforce. Those who are afraid to lose their jobs are twice as likely to look for another employer (35%) than those who do not (14%).

Customer services & support workers' loyalty mirrors that of the global workforce, as 63% said they were more loyal to their employer, while only 8% said they were less loyal.

*definition & sample composition of the customer services & support workers can be found on slides 45–46

executive summary.

The factor most appealing to the customer services & support workforce is its salary & benefits offering (cited by 63%), followed by a good work-life balance (59%) and job security/pleasant work atmosphere (57%). Having said this, when diving deeper into specific work groups, we see that those in sales/support attach more importance to nearly all drivers when compared to those working in services. The top three most important drivers for sales/support workers are attractive salary & benefits (66%), work-life balance (61%) and a pleasant work atmosphere (60%). Job security ranks higher in importance among the services workforce when compared to their sales/support counterparts (second vs. fourth). When looking at some of the less important drivers, those in services find giving back to society slightly more important than those in sales/support (34% vs. 31%).

Agriculture is the most attractive sector (57%) for the customer services & support workforce, with ITC and FMCG as the runner-ups for the most attractive sectors to work in (51% each). However, when it comes to being able to work for companies in the relevant sectors, based on one's set of skills and experience, those in customer services & support feel their skills are most suited for retail (49%), hospitality (45%) and FMCG (40%).

executive summary.

About 1 in 6 global customer services & support workers changed their employer in the second half of 2020 (17%) and slightly more planned to do so in the first half of 2021 (23%). Those aged 18 to 24 (26%) were more likely to have changed employers in the last half of 2020 and a wider age group (18 to 34) were likely to have switched jobs in the first half of 2021 (29%). This is slightly different from the global workforce who was less likely to have changed their employer (12%) or to plan to do so (20%). Customer services & support workers changed jobs most often in North America (25%). Those in CIS (31%) and Latin America (29%) were more likely than those in other regions to change employers in the first half of 2021.

Those working in customer services & support are most likely to find their next employer on job portals (34%), followed by personal connections/referrals (32%). The higher educated and men working in customer services & support more often make use of recruiters (37% and 29%), while those aged 24 to 35 are more likely to find their next employer on job portals (47%).

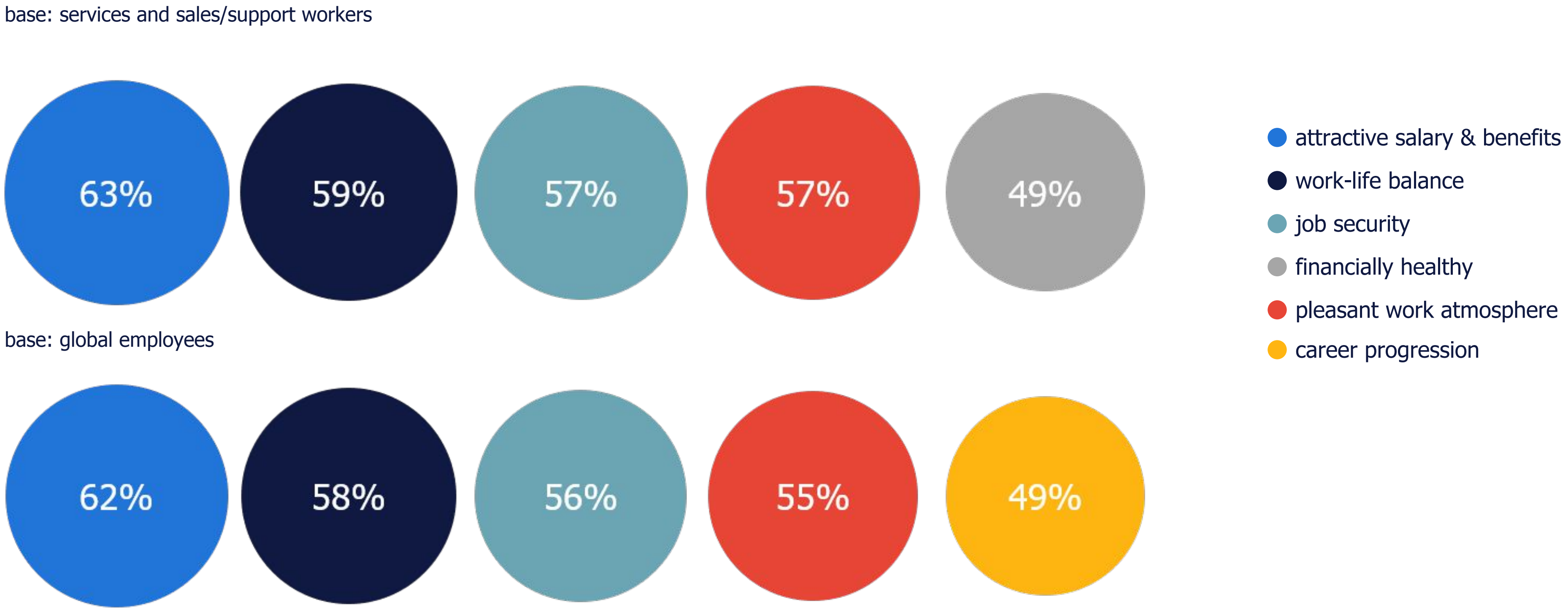
We hope the data contained in the following pages will help you to better understand how to attract customer services & support talent in a transformed world of work.

what

customer services & support workers want.

when compared to the global employee, customer services & support workers are not much different in what they want from their ideal employer.

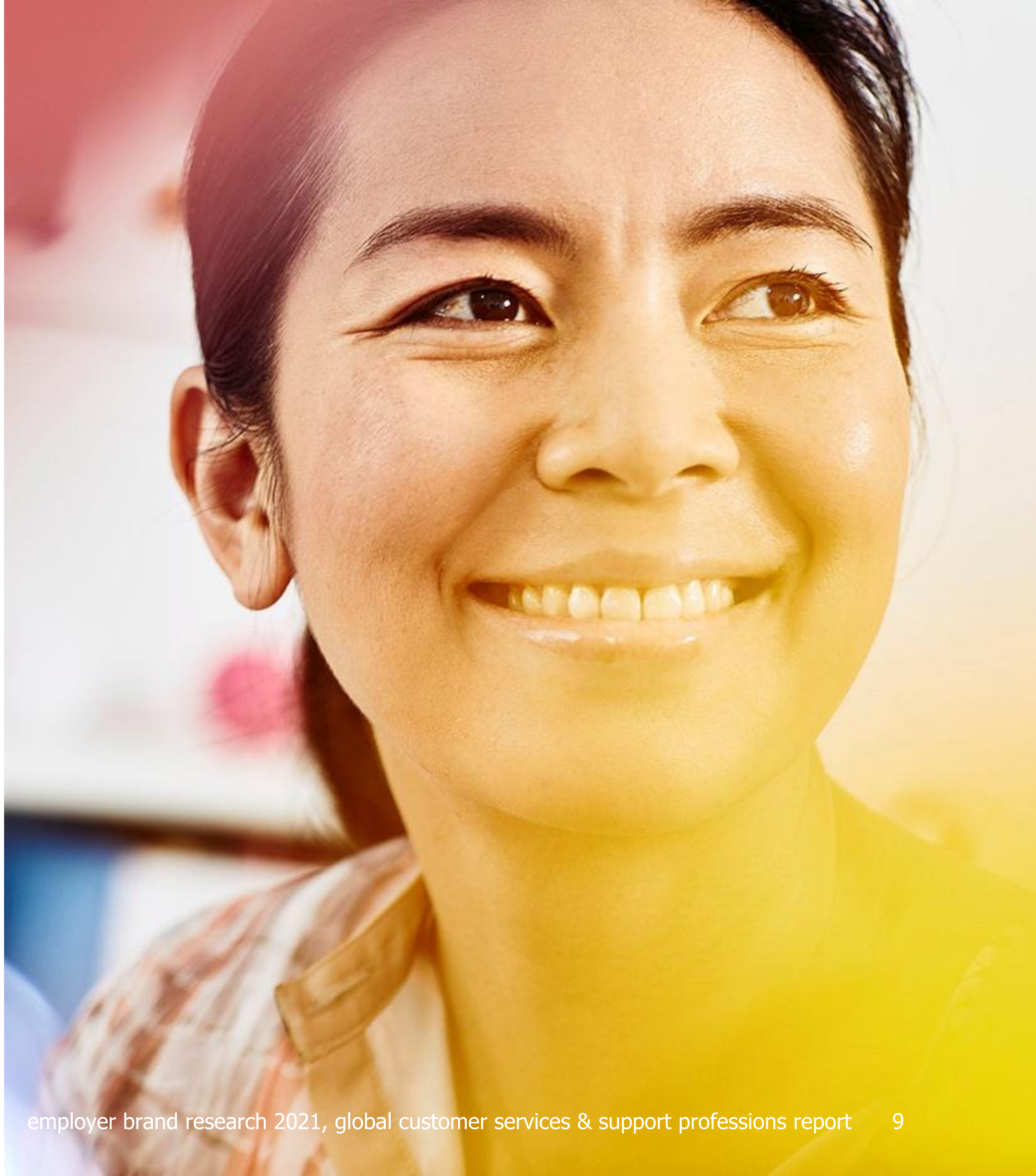
top 5 reasons to choose an employer



salary & benefits are more important for sales workers.

Customer services & support workers, just like the global workforce, find attractive salary & benefits the most important proposition in an employer. A notable observation when looking further into these two groups (defined within the category*) is that, although the top 5 most important drivers are relatively the same, the sales workers rate salary & benefits even higher (66%) than service workers (59%), with the main difference being that sales workers chose the financial health of a company in their top 5, while service workers chose career progression and good training over financial health.

When looking at customer services and support as a whole group, women rate most drivers more important than men; however, one driver men rate more important is the use of the latest technologies (31% vs. 22%). When looking at the levels of education of the whole group, the middle-educated workforce are far more demanding, considering on average eight drivers important, whereas the lower and higher educated consider on average six drivers important.



*definition & sample composition of the customer services & support workers can be found on slides 45–46

customer services & support workers in APAC are the least demanding.

Although career progression is more important for the global workforce than it is for those in customer services & support,* the younger generation in this latter group finds this attribute more important (54%) than those aged 35 and older (43%).

The customer services & support workforce in APAC are the least demanding among the regions, considering around five drivers essential, whereas in the rest of the world workers consider between seven & eight drivers as essential. Workforce living in the CIS region find attractive salary & benefits considerably more important (80%) than those in other parts of the world (63% on average). In Latin America, salary & benefits (65%) comes after the two topmost important drivers for workers in this region: a pleasant work atmosphere (68%) and career progression (67%). The North American workforce are similar with seeking work-life balance (67%) before salary & benefits (66%).

A pleasant work atmosphere is the second most important driver in Europe and APAC (66% and 49%); in CIS the second most important driver for those working in customer services & support is financial health (78%).

*definition & sample composition of the customer services & support workers can be found on slides 45–46

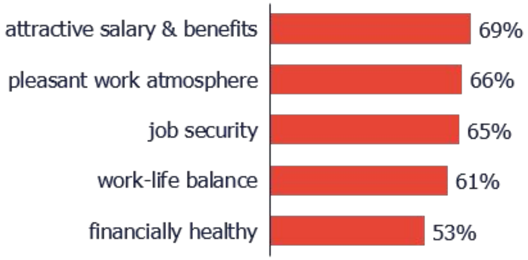
top 5 reasons to choose an employer

regional differences can shape an organization's employee value proposition.

what do customer services & support workers want - by region

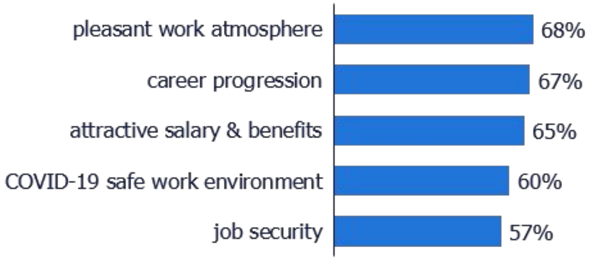
north america

europe

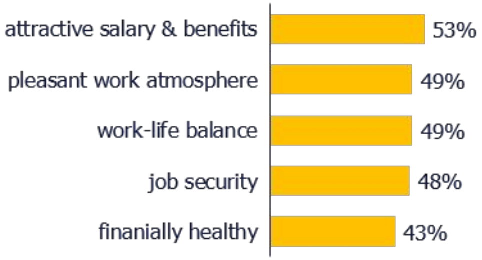


cis

latin america



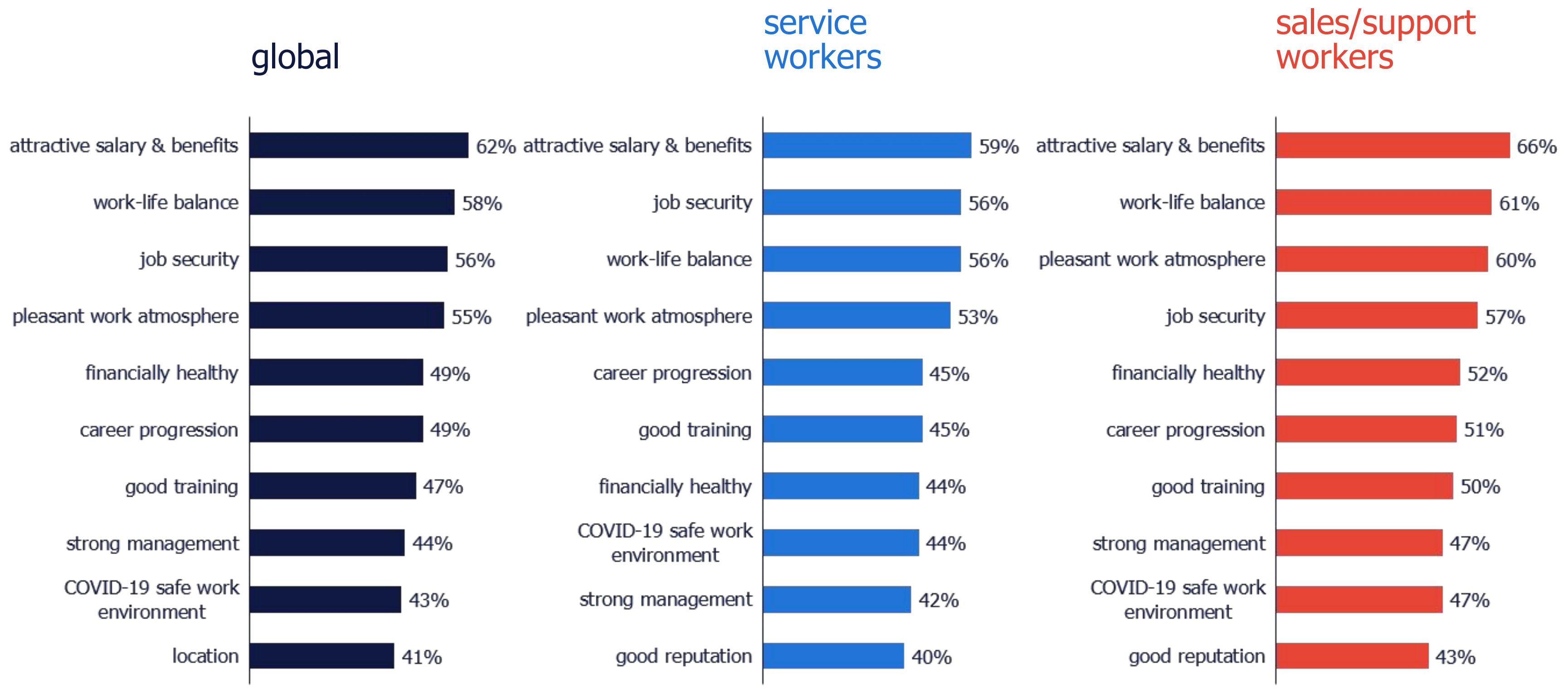
apac



base: services and sales/support workers

the most sought-after drivers differ
across customer services & support workers.

top 10 reasons to choose an employer
deep dive global customer services & support workforce vs. global employees



the use of latest technologies not important among customer services & support workers.

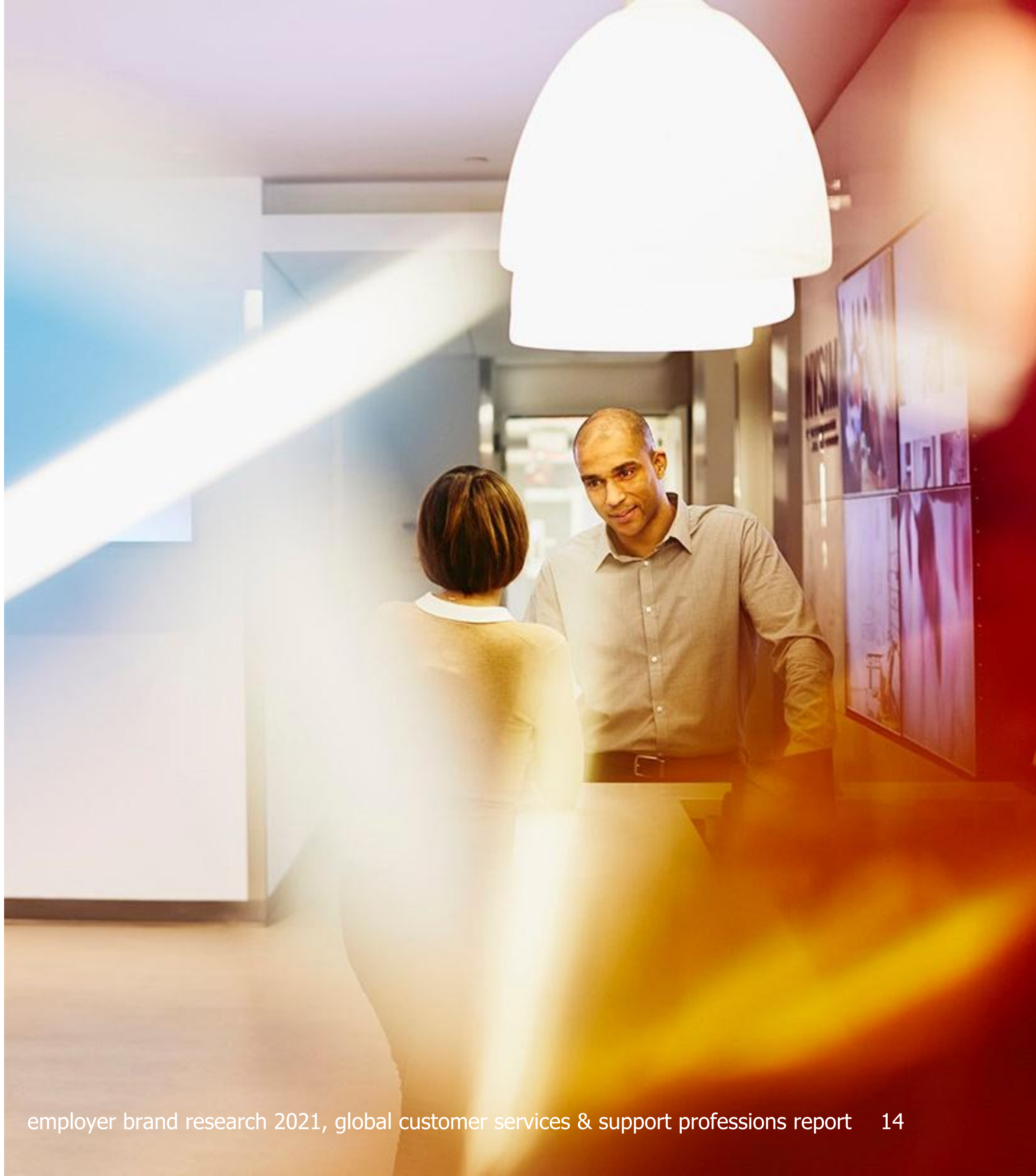
6 least important reasons to choose an employer
deep dive customer services & support workforce vs. global employees

career progression slightly less important to customer services & support workers.

When comparing certain attributes across the four professions (healthcare, ITC, business administration and customer service), the customer services & support workforce rate career progression on par with that of those in healthcare (48%) and similar to those in business & administration (49%) yet considerably lower than those in ITC & engineering (-6%).

Irrespective of those working in customer services & support, attractive salary & benefits, and work-life balance are the two most important drivers among all four groups of professionals.

Overall, those in customer services & support are equally demanding when compared to the other professions in what they want from an ideal employer, with an average of seven drivers important to all four talent groups.



customer services & support workers rate a pleasant work atmosphere slightly higher than that of other professions.

top 5 most important drivers globally compared to
4 job family groups

	attractive salary & benefits	work-life balance	job security	pleasant work atmosphere	career progression
global	63%	58%	56%	55%	49%
healthcare professionals	60%	57%	55%	56%	48%
ITC & engineering	65%	62%	60%	55%	54%
business & administration	63%	59%	57%	54%	49%
customer services & support	63%	59%	57%	57%	48%

customer services & support workers

sector attractiveness.

ITC an attractive industry to grow worker skill sets.

attractiveness insights

Agriculture is the most attractive sector for the customer services & support workforce* (57%), however, sales workers (31%) have fewer skills to work in this industry than service workers (40%). ITC and FMCG are strong contenders in second place among the whole group in customer services & support when it comes to sector attractiveness (51%); however, workers in this industry are less likely to have the skill sets to work in ITC (34%).

When further examining the customer services & support profession groups, both service workers and sales & support workers have the highest skills to work in retail (47% and 50%, respectively). Second, to that, both groups can work in hospitality (45%) but rate this as a less attractive industry to work in (43%), especially by sales & support workers.

Within a world where technology is driving business, and considering the attractiveness but lack of skills to work in ITC, there is room to grow the skill sets among the workforce in customer services & support.

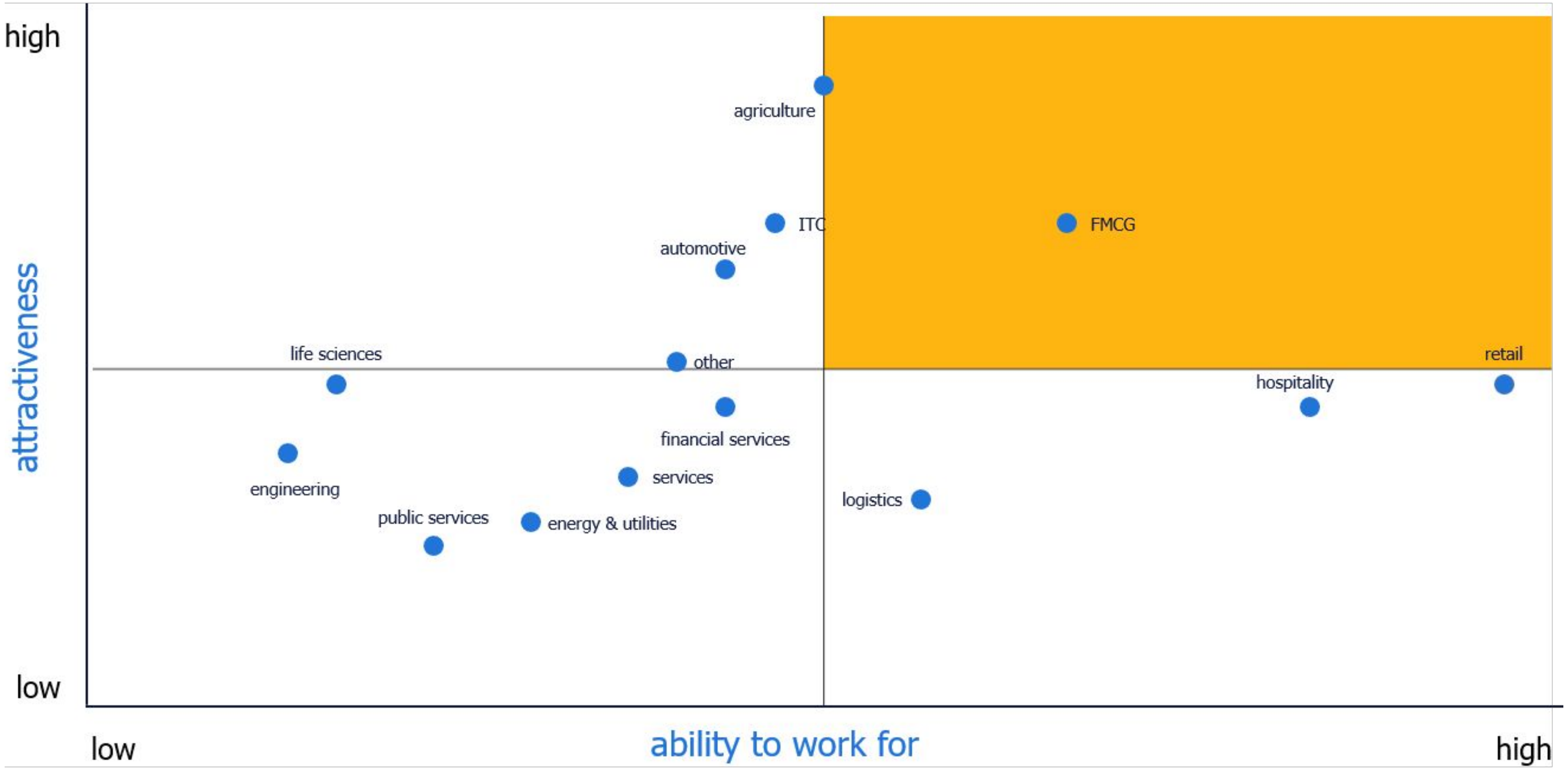
*definition & sample composition of the customer services & support workers can be found on slides 45–46

sales & support workers rate ITC higher in attractiveness than service workers do.

sector attractiveness

*the ITC sector relates to companies in IT, Technology & Communications

total customer services & support workers attractiveness
vs. ability to work for it.



high ability to work for

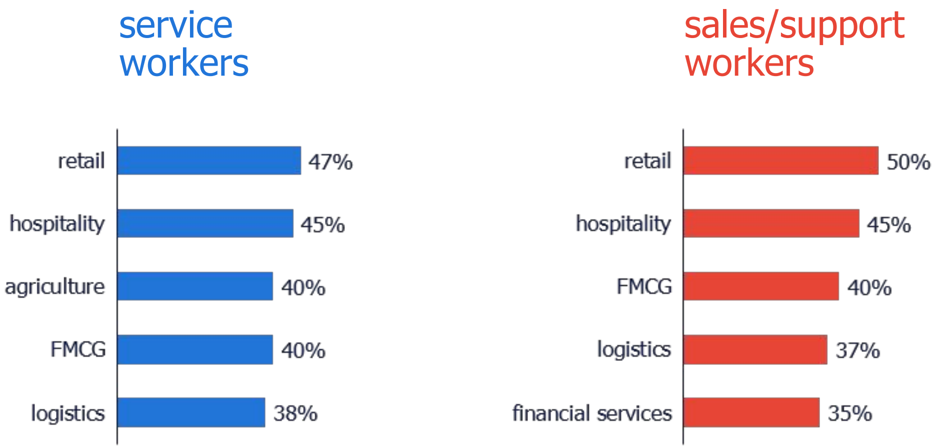
sectors with a high score contain more companies whom respondents feel they could work for, based on their skills.

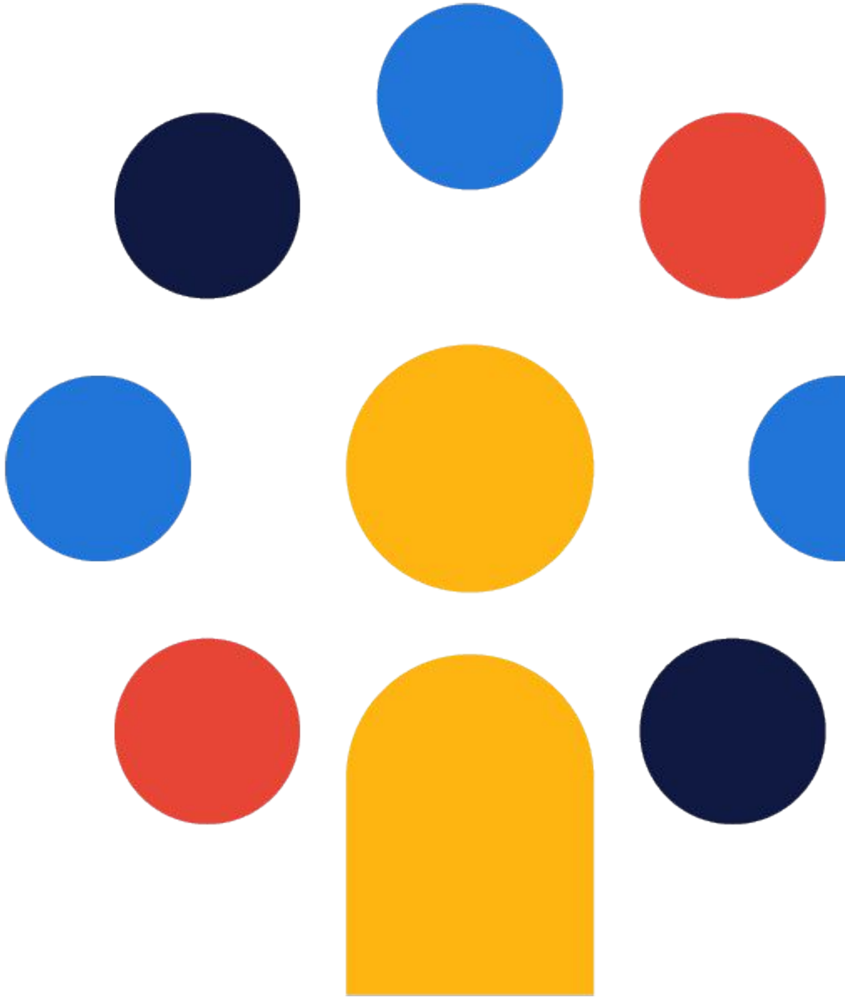
high attractiveness

A sector with high attractiveness contains more highly attractive companies than other sectors.

customer services & support workers both have a strong set of skills to work in the retail industry.

sector ability to work for





*the ITC sector relates to companies in IT, Technology & Communications

customer services & support workers

job switching behavior.

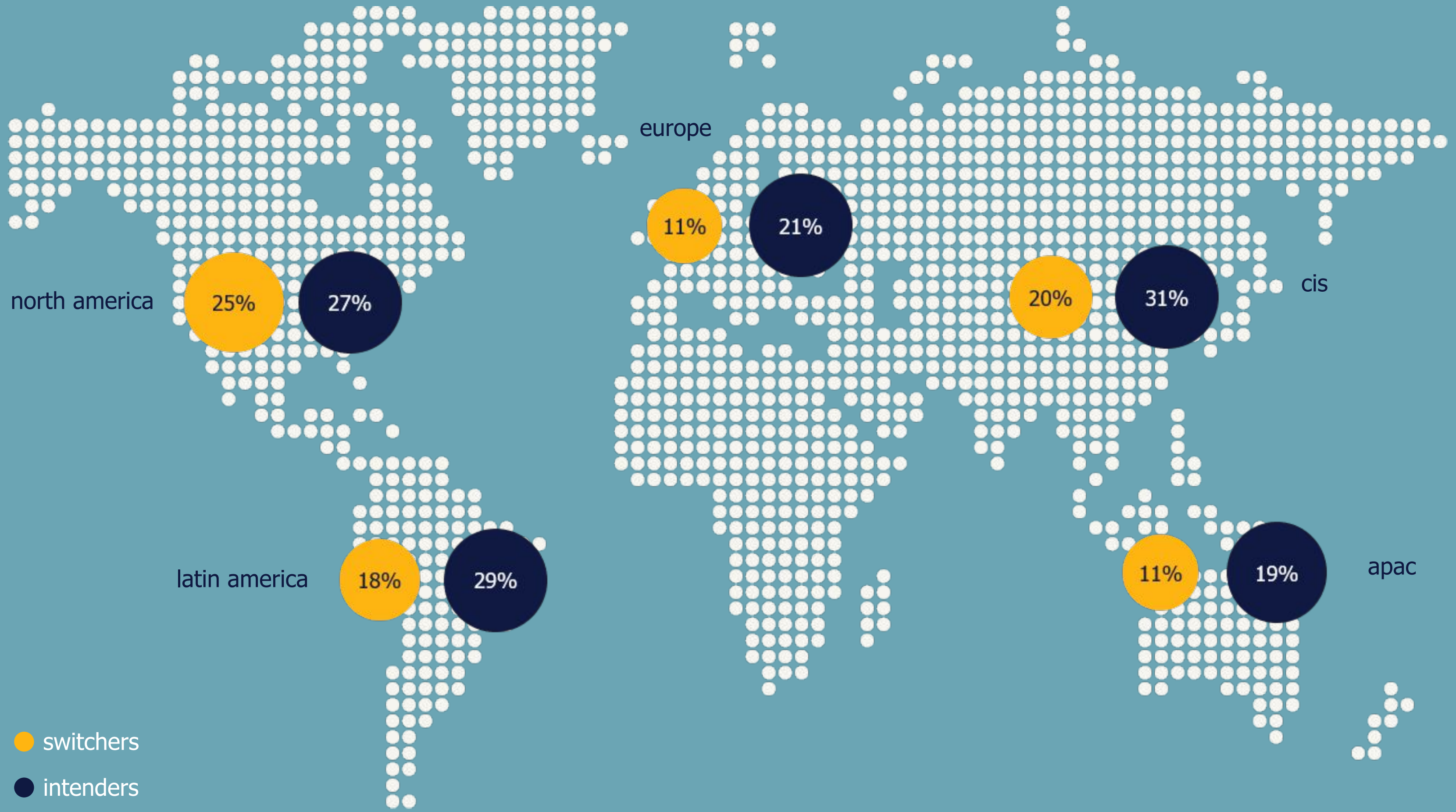
job switching is highest in north america.

Of the customer services & support workforce, 17% changed their employer in the last half of 2020, more so among the 18–24-year-olds (26%) and the lower-educated workforce (24%). Overall, 23% intended to switch employers in the first half of 2021, which sees a wider age group, 18–34-year-olds (average 29%) intending to do so and no difference among the lower- to higher-educated workforce.

North America sees the highest number of individuals switching jobs in the last half of 2020 (25%), followed by CIS and Latin America (20% and 18%, respectively). Compared with other regions, working-age adults in CIS were also more likely to consider changing their employer in the first half of 2021 (31%), followed by Latin America (29%).

For those who had planned to change jobs in the first half of 2021, good training (55%), career progression (53%) and the possibility to work remotely (41%) were the drivers that were more important to them than those who did not plan to change jobs.

intention is greater across all markets when compared to switching.



global switchers in customer services & support workers

17%

changed employer in the last half of 2020.

global intenders in customer services & support workers

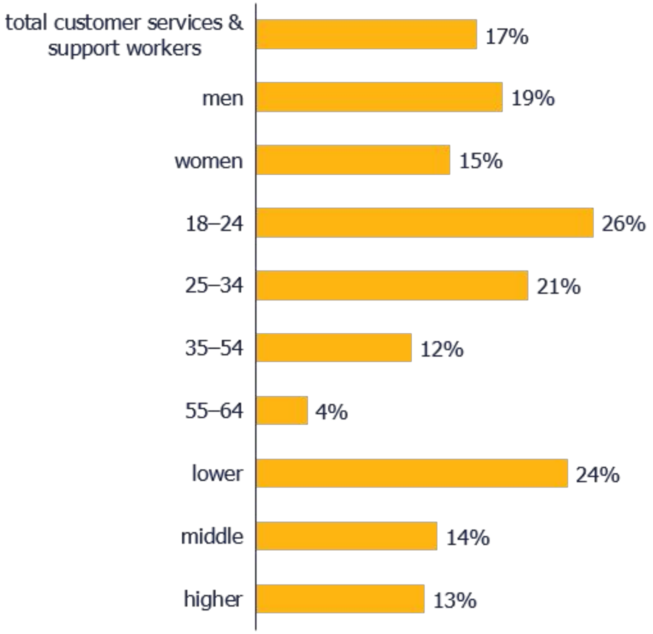
23%

plan to change employer in the first half of 2021.

switching behavior among the customer services & support workforce by socio-demographics.

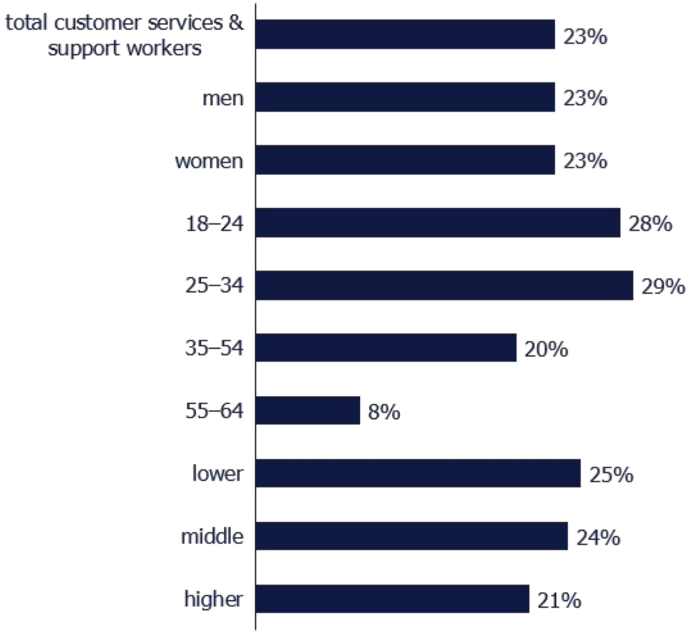
switchers

base: services and sales/support workers



intenders

base: services and sales/support workers



Deep dive into switching behavior by customer services & support workers can be found in the appendix

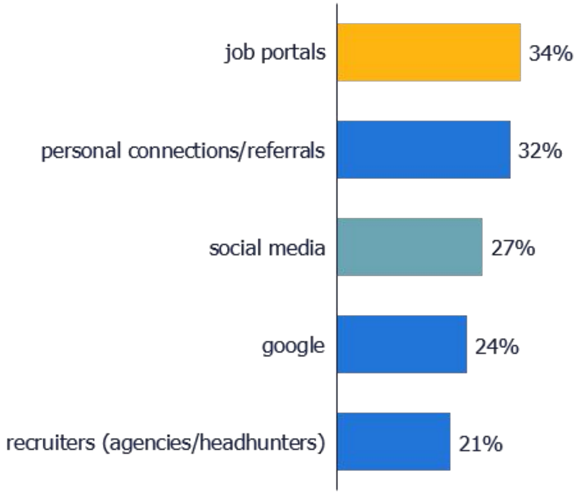
job portals remain critical to talent seeking new opportunities.

The search channel most often used by customer services & support job seekers is job portals (34%). This is especially true for those aged between 25 and 34 (47%) and those living in APAC and the CIS region (both 51%). Furthermore, using recruiters to find work is far more popular among men (29%) and the higher-educated workforce (37%).

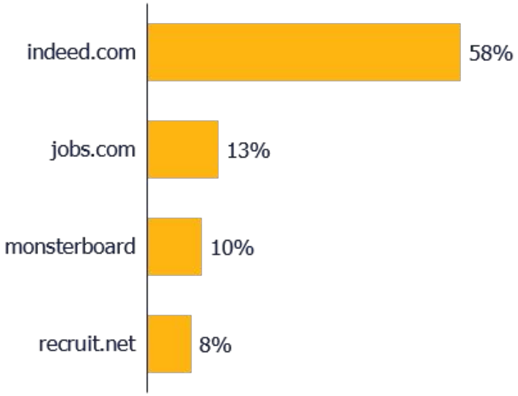
Social media (27%) is an important channel in the job search process and is also seen as more popular among men (37%) and those living in Latin America (43%). Facebook (54%) and Instagram (35%) are the social media platforms most used for finding work by the average customer services & support workforce.

customer services & support workers' preferences when searching for new job opportunities.

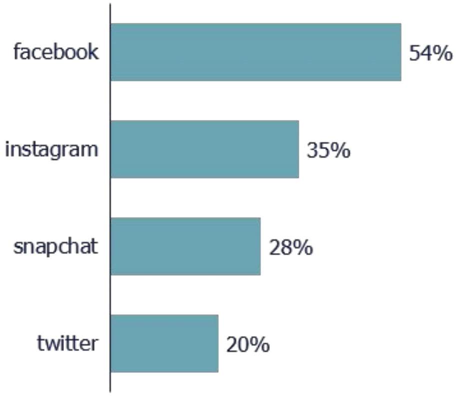
top 5 channels used to find a job



top 4 job portals



most searched social media channels



COVID-19

in focus.

COVID-19 causes more disruption among customer services & support workers.

Over 60% of professionals globally in healthcare, ITC and business continued to work as usual during the pandemic; however, those in customer services & support faced more disruption in their work, with 52% continuing to work as normal. Men (58%), 35–54-year-olds (58%) and those in the CIS region (63%) indicated more often that they were able to continue their work as normal.

1 in 4 individuals in customer services & support worked reduced hours or for a reduced salary (24%). This was true for more women (28%) than men (20%), and those living in Latin America (30%) and APAC (28%). When further looking into the two groups, this impact can be seen more among service workers (27%) than among sales/support workers (22%).

unemployment higher in customer services & support.

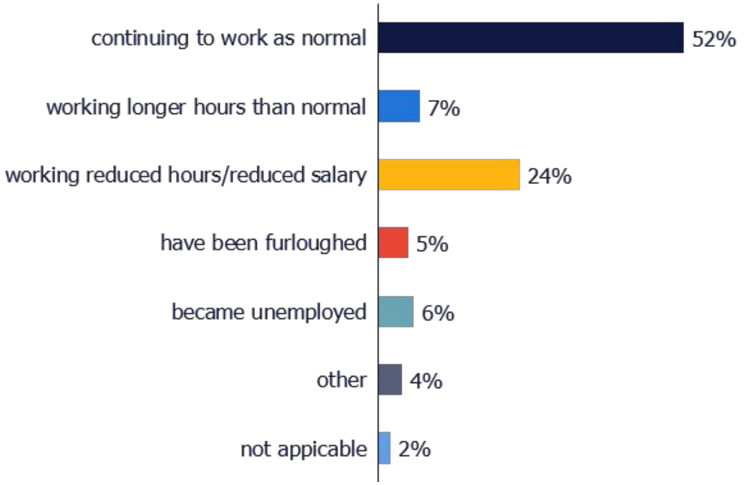
The proportion of those who became furloughed or unemployed in customer services & support (11%) was higher than of those working in healthcare, ITC & engineering, or business & administration (less than 5% on average). A higher proportion of customer services & support workers who were furloughed or became unemployed was among the 18–24-year-olds (15%), the lower educated (17%), and those living in North America (14%), Europe (13%), and Latin America (11%).

A greater number of the customer services & support workforce who were afraid of losing their job in 2021 planned to change their job in the first six months of 2021 (35%), whereas for those who were not afraid of losing their job, only 14% planned to change their job. The highest number of workers who were afraid of becoming unemployed and planned to change jobs could be found in in North America (46%), whereas in CIS we saw the highest number of workers planning to change jobs who were not afraid of losing their job in the first half of 2021 (26%).

how COVID-19
affected employment.

how COVID-19 changed one's employment situation

base: services and sales/support workers



fear of job loss

customer services & support workers

31%

Adults who continued to work in 2020 are afraid they will lose their job in 2021 as a result of COVID-19.

region

Workers in Latin America (52%) whose jobs were not affected in 2020 by COVID-19 are the most afraid of losing their job in 2021, whereas employees in North America (26%) are afraid of losing their job in 2021.

intention to switch jobs among those fearing job loss and those unafraid.

afraid

35%

of those who are afraid of losing their job plan to change their job in the first six months of 2021.

not afraid

14%

of those who are not afraid of losing their job plan to change their job in the first six months of 2021.

higher-educated workers started working remotely.

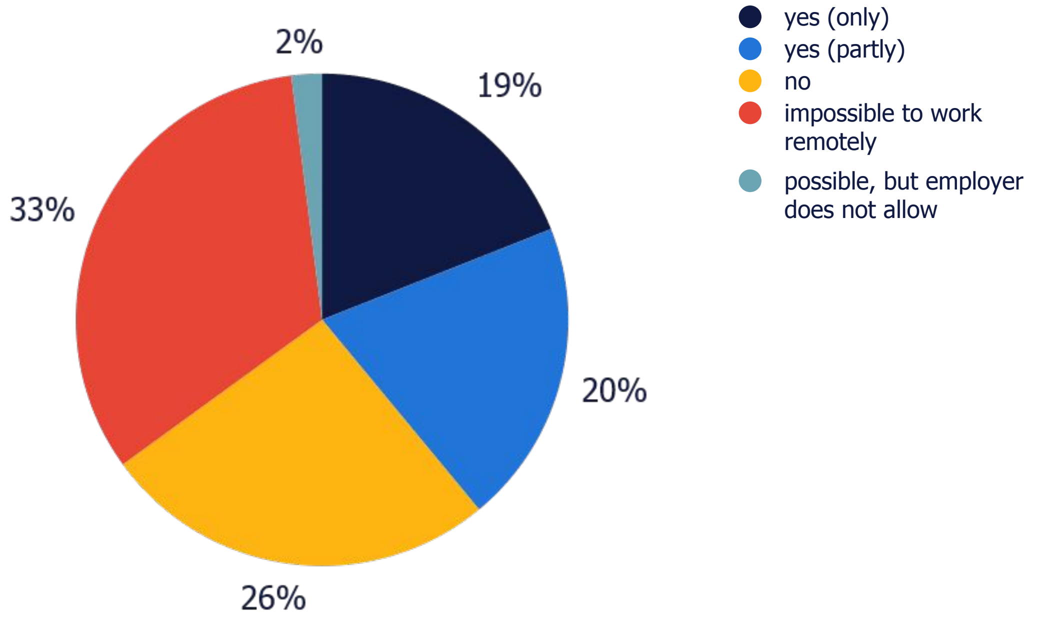
33% of the customer services & support workforce are attracted to companies offering the possibility to work remotely. Regionally, working remotely is most important in Latin America (44%).

Half of those with higher education started working fully or partly from home during the pandemic as opposed to the low-mid educated workforce (average 34%). More of those living in Latin America started working partly or fully from home during the COVID-19 crisis (52%). On the other hand, more jobs in CIS (49%) and Europe (40%) are bound to the premises, which made working from home or elsewhere impossible.

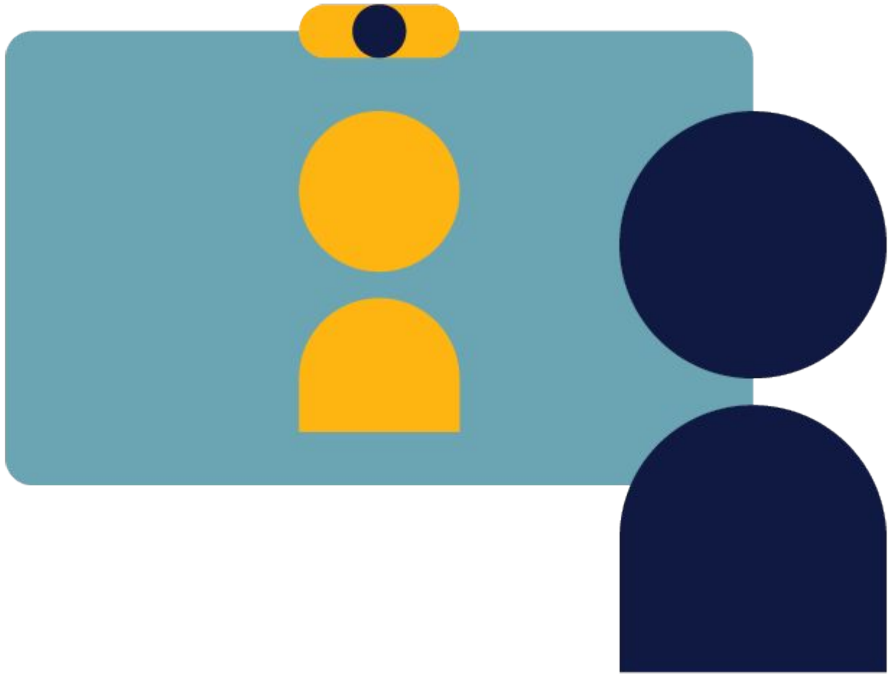
When looking at the service workforce vs. those in sales/support, there is not much difference between these groups when it came to working remotely or working on company premises.

61% of the customer services & support workers did not work from home during the COVID-19 pandemic.

did you start working (more) remotely/from home due to the COVID-19 crisis?



base: services and sales/support workers



majority of customer services & support workers made the decision to work remotely.

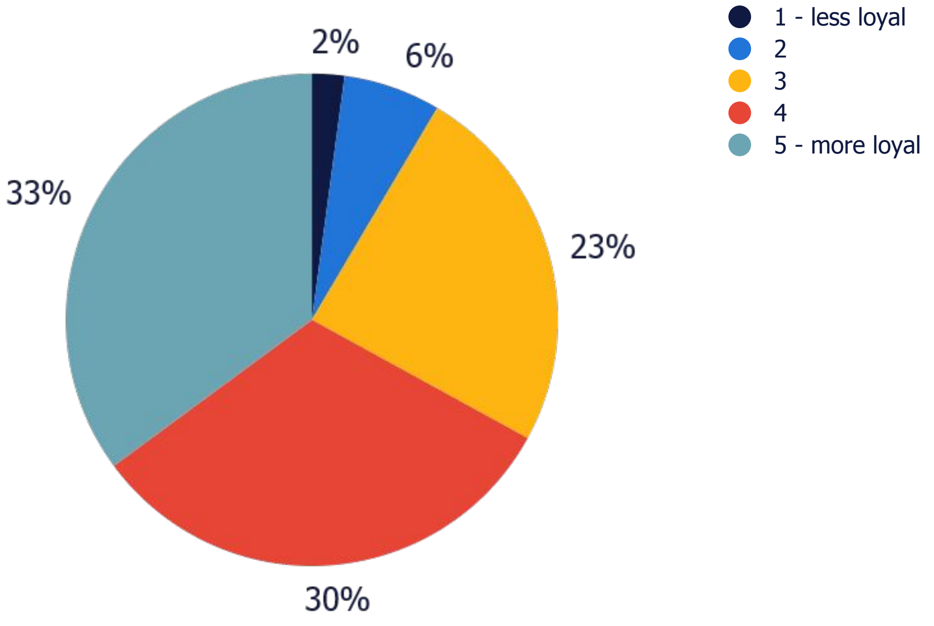
Out of the 39% of those who started working remotely, 63% were involved in the decision to do so, whereas for 35% the decision was mandated by their employer and/or regulatory authorities.

When looking further at service workers and sales/support, we found that women working in services (72%) were more likely than men (61%) to be involved in the decision to work remotely. The opposite was true among the sales/support workers, where 69% of men and 45% of women were involved in the decision to work from home.

Our research also found that lower-educated workers (73%) were more involved in the decision to work remotely than that of the mid-higher educated workforce (average 61%).

employer management of COVID-19
among customer services & support workers.

loyalty to one's employer based on how well supported employees felt during the COVID-19 pandemic



base: services and sales/support workers

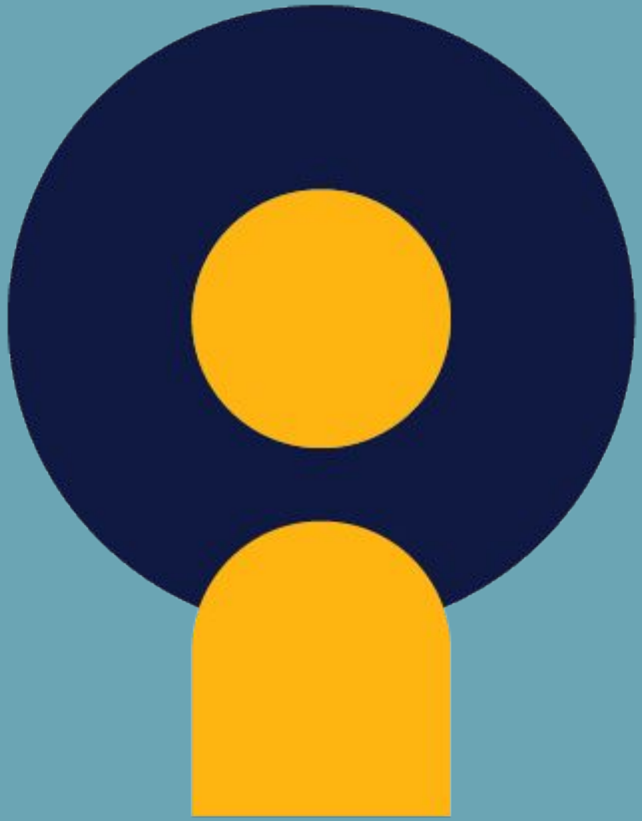
How well employers supported their employees and managed the pandemic has had a positive impact on customer services & support workers' loyalty. Overall, 63% of talent feel more loyal to their employer as opposed to 8% who feel less loyal.

There are no differences among the demographics (gender, age or education) when it comes to loyalty among employees in this industry. However, regionally there are differences, with a high percentage of working adults located in Latin America (72%), North America (64%), APAC (61%) and Europe (60%) saying they are more loyal to their employer. This is the opposite in the CIS region, where 32% of workers feel less loyal.

appendix.

1 what customer services & support workers want
2 job switching behavior

what customer services & support



workers want.

what customer services & support workers want.

1/2

	global	travel attendants, conductors and guides	cooks	waiters and bartenders	hairdressers, beauticians and related workers	building and housekeeping supervisors	other personal services workers
attractive salary & benefits	62%	52%	56%	50%	57%	41%	68%
work-life balance	58%	49%	60%	54%	47%	36%	62%
job security	56%	51%	53%	49%	46%	48%	64%
pleasant work atmosphere	55%	49%	52%	57%	45%	36%	58%
financially healthy	49%	48%	42%	37%	47%	30%	50%
career progression	49%	38%	45%	40%	38%	34%	51%
good training	47%	41%	53%	47%	35%	42%	45%
strong management	44%	35%	45%	38%	41%	34%	45%
COVID-19 safe work environment	43%	31%	45%	45%	49%	50%	42%
location	41%	32%	40%	36%	33%	36%	45%
interesting job content	40%	37%	31%	34%	33%	41%	42%
very good reputation	39%	41%	50%	41%	34%	33%	39%
possibility to work remotely	38%	19%	27%	24%	32%	20%	37%
diversity & inclusion	37%	27%	34%	38%	40%	22%	37%
gives back to society	35%	36%	32%	36%	36%	31%	35%
uses latest technologies	30%	31%	31%	25%	28%	22%	20%

what customer services & support workers want.

2/2

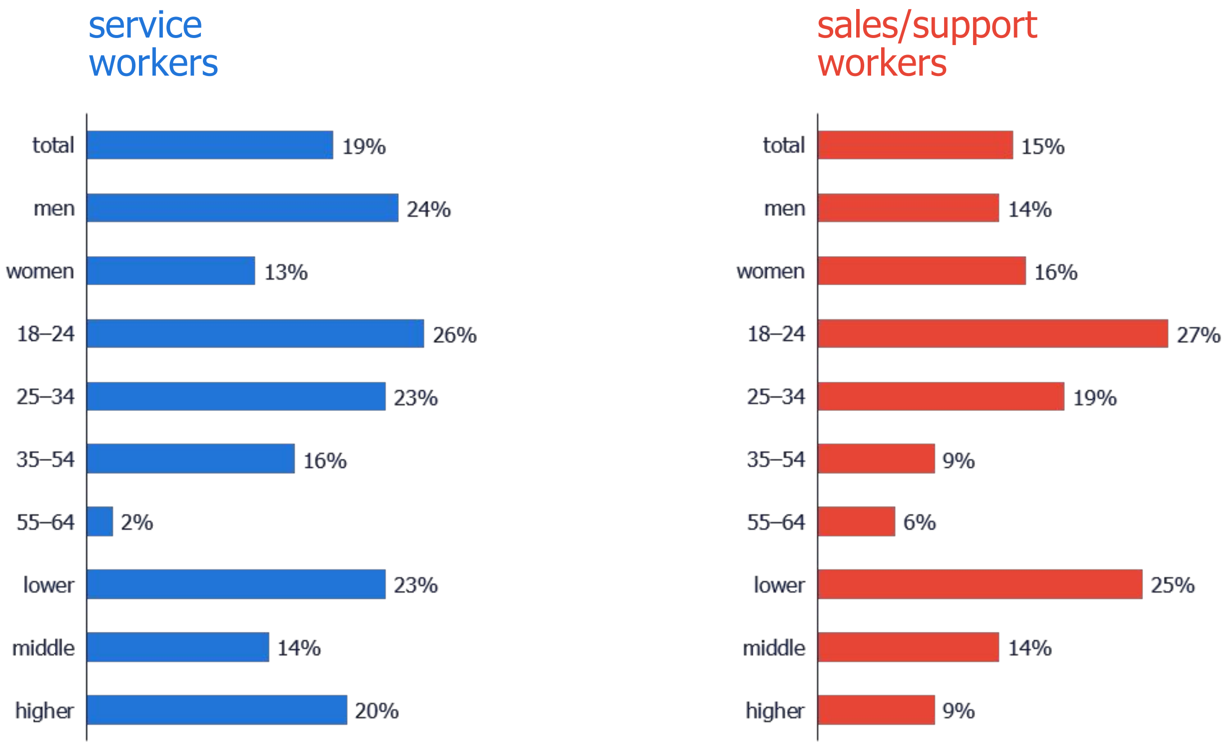
	global	street and market salespersons	shop salespersons	cashiers and ticket clerks	other sales workers
attractive salary & benefits	62%	55%	65%	63%	71%
work-life balance	58%	49%	59%	62%	66%
job security	56%	50%	57%	58%	59%
pleasant work atmosphere	55%	45%	61%	57%	63%
financially healthy	49%	54%	48%	48%	55%
career progression	49%	48%	46%	52%	56%
good training	47%	40%	47%	58%	54%
strong management	44%	37%	43%	47%	52%
COVID-19 safe work environment	43%	34%	49%	55%	47%
location	41%	37%	41%	45%	46%
interesting job content	40%	35%	41%	38%	42%
very good reputation	39%	39%	39%	48%	46%
possibility to work remotely	38%	25%	30%	29%	43%
diversity & inclusion	37%	31%	36%	51%	38%
gives back to society	35%	26%	35%	34%	30%
uses latest technologies	30%	26%	24%	28%	31%

job switching behavior

switching behavior among the customer services & support workforce by socio-demographics.

switchers

base: services and sales/support workers

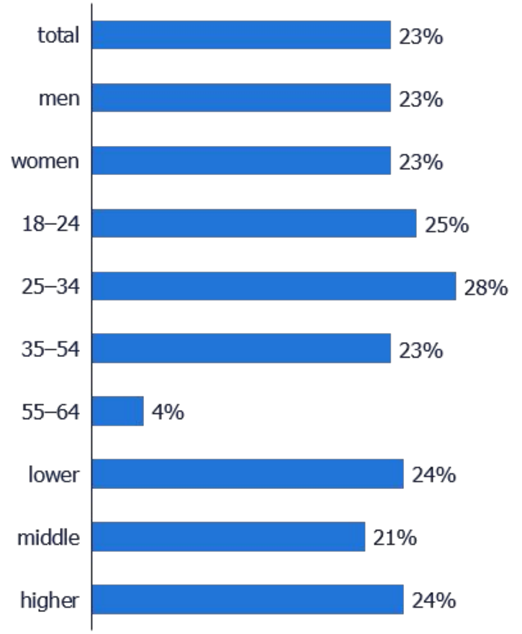


switching behavior among the customer services & support workforce by socio-demographics.

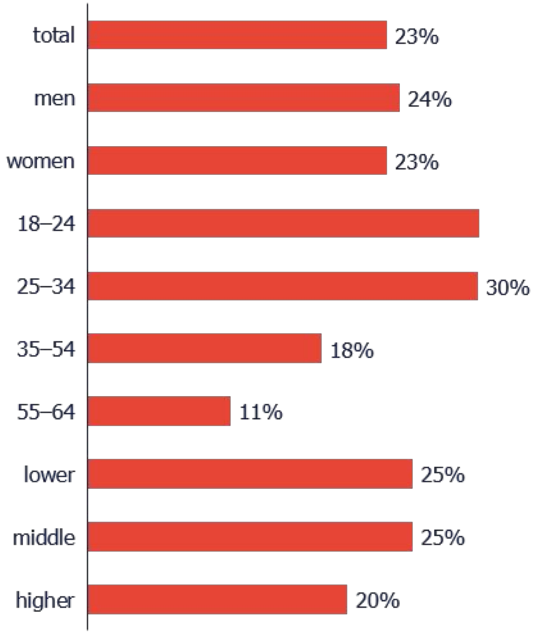
intenders

base: services and sales/support workers

service workers



sales/support workers



about the

research.

what is the randstad employer brand research?

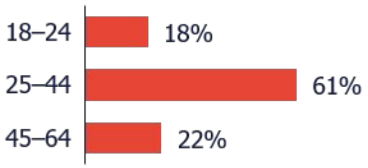
- a representative employer brand research based on perceptions of the general audience. Optimizing 21 years of successful employer branding insights.
- an independent survey with over 190,000 respondents in 34 markets worldwide.
- a reflection of employer attractiveness for each market's largest employers known by at least 10% of the population.
- provides valuable insights to help employers shape their employer brand.

definition & sample composition of the customer services & support workers' sector.

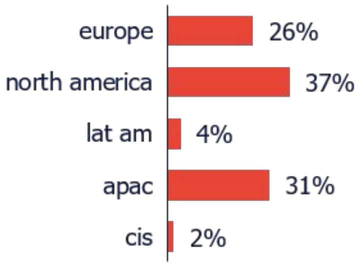
1/2

gender

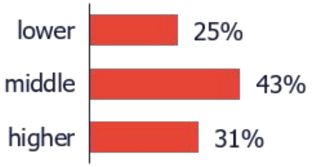
age



region



education



employment situation

total sample of customer services & support workers: n=16,879
fieldwork: between January and February 2021

definition & sample composition of the customer services & support workers' sector.

2/2

customer services & support workers definitions

service workers

travel attendants, conductors and guides

cooks

waiters and bartenders

hairdressers, beauticians and related workers

building and housekeeping supervisors

other personal services workers

sales/support workers

street and market salespersons

shop salespersons

cashiers and ticket clerks

other sales workers

34 markets surveyed covering more than 80% 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
mexico
new zealand
netherlands
norway
poland
portugal
romania
russia
singapore
spain
sweden
switzerland
ukraine
UK
USA

worldwide
- over 190,000 respondents
- 6,493 companies surveyed

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

fieldwork
- online interviews
- between January and February 2021

length of interview
- 16 minutes

breakdown of customer services & support workers' sector by market.

country*	n=
argentina	506
australia	645
austria	366
belgium	901
brazil	224
canada	391
china	226
czech republic	533
france	667
germany	435
greece	238
hong kong	239
hungary	693
india	169
italy	479
japan	929
kazakhstan	213
luxembourg	65
malaysia	214
mexico	1,008
the netherlands	932
new zealand	464
norway	372
poland	453
portugal	404
romania	625
russia	860
singapore	208
spain	989
sweden	332
switzerland	280
ukraine	553
UK	893
US	373

*global data is weighted on GDP

employer brand research setup.

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 COVID-19 safe work environment

03 very good reputation

04 job security

05 career progression

06 gives back to society

07 possibility to work remotely/from home

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.

randstad

human forward.