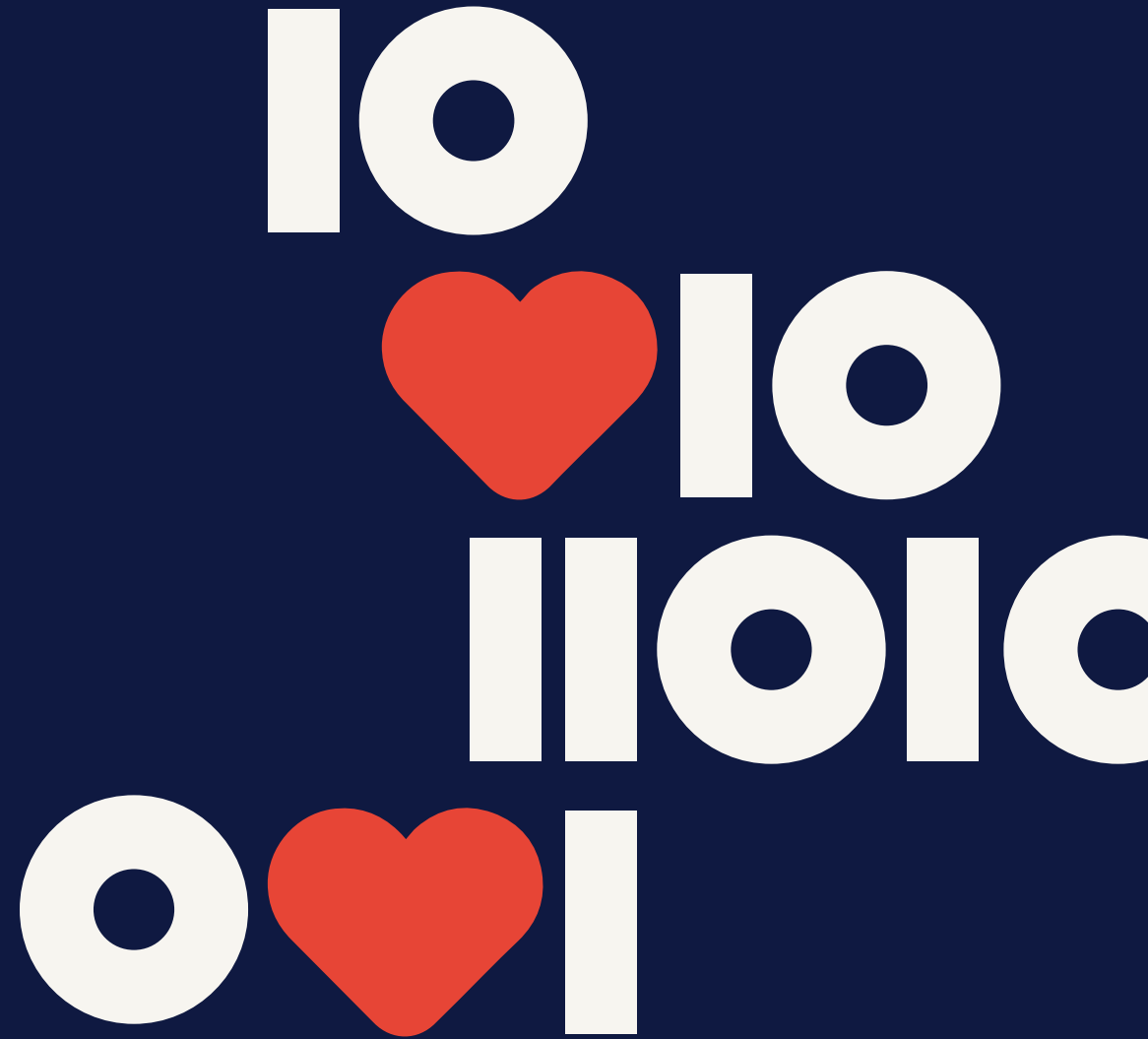


employer
brand research
2018.

global insights into the perception
of the ITC sector.

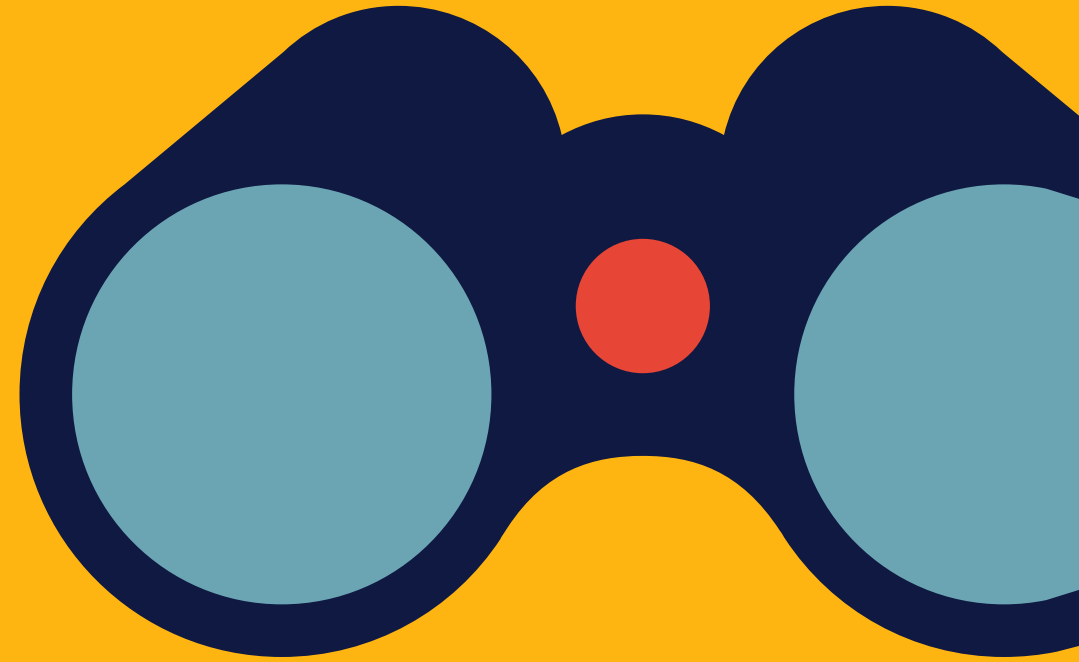
 randstad



human forward.

content.

- 1 executive summary
- 2 what do ITC workers want
- 3 switching behavior
- 4 how attractive is the ITC sector
- 5 appendix



executive

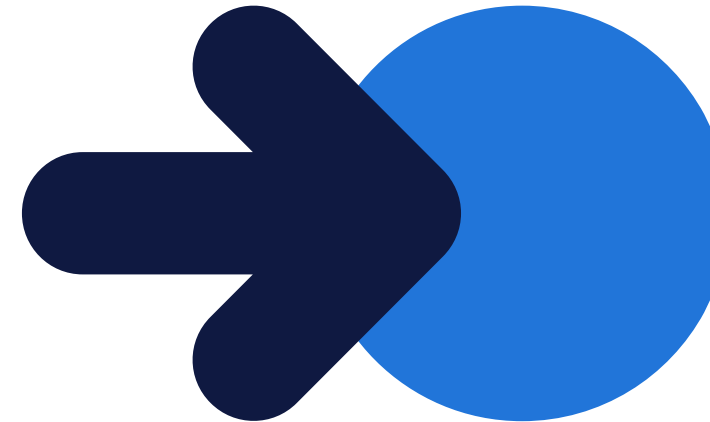
summary.



executive summary.

the power of the randstad employer brand research to help you win the war for talent

No industry is doing more to change the world than information technology and communications (ITC). How we live, learn, shop and engage with each other is constantly transforming, thanks to countless number of innovations the sector introduces every day around the world. It's no surprise that ITC is considered the most attractive industry, according to the 2018 Randstad Employer Brand Research, an exhaustive survey of 175,000 working-age adults in 30 countries about their employment preferences.



executive summary.



With such a strong appeal to workers around the world, this sector is able to build a robust pipeline of talent to draw some of the brightest and smartest people. It's the most appealing industry in North America and the APAC region and No. 2 in Latin America. In Europe, the sector has less pull, falling behind life sciences, automotive and fast-moving consumer goods. Clearly, ITC's innovations are exciting talent everywhere.

executive summary.

The ITC sector has its share of challenges when competing and retaining talent. Our research shows that professionals in this sector tend to change jobs more often than their peers in other industries, making retention a top concern. We also found that loyalty may be secondary to a greater desire: the opportunity to advance their careers more quickly. A higher percentage of ITC workers cited this reason as a motivation to look for a new job than peers in other sectors.



executive summary.



Job security is the No. 1 attribute that motivates workers to remain with their employers followed by salary & benefits and work-life balance. Age is also an indicator of retention since the highest percentage of workers who plan to change jobs are those in the ages of 18 to 24, while those least likely to do so are 45 years old and higher. Beyond age, education levels also indicate likelihood to stay or leave an employer, with the most educated more likely to seek opportunities elsewhere.

executive summary.

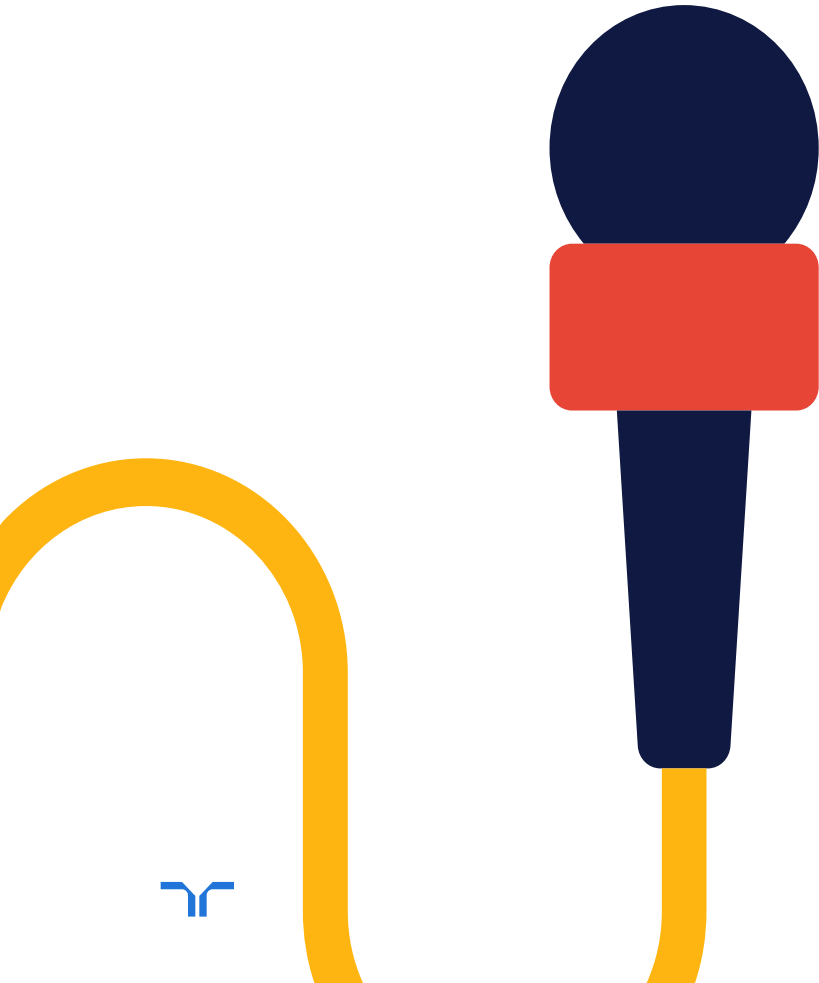
Despite the universal attractiveness of the ITC sector, companies may find it more challenging to acquire all the talent they need. That's because only 38% believe they have the skill set needed to join this industry, leading many who would like to be part of it to stay away. The group least likely to envision working in this industry are women, older workers and those with less education.



executive summary.

As an employer in the ITC sector, you are probably experiencing difficulties accessing all the talent you need. By understanding the inherent challenges that exist in your industry, you might be better positioned to overcome these and attract the critical skills needed to help develop the innovation expected from your business. The data presented in this report will help you obtain some of this insight, but be sure to contact us for more company-specific knowledge.

james foley
global SVP, employer brand
talent innovation center
randstad sourceright



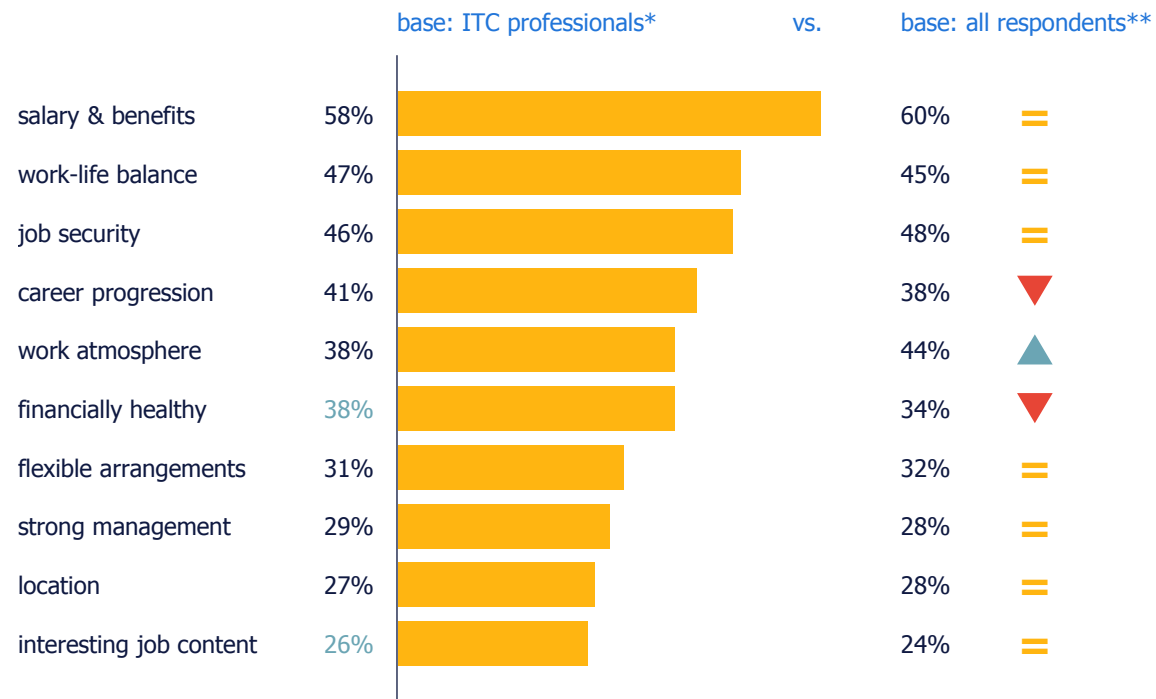
what do



workers want.

what do ITC workers want vs. global employees.

top 10 reasons to choose an employer



The top 5 attraction drivers are stable over time with salary & benefits remaining the primary reason for ITC professionals to choose an employer.

ITC professionals value work-life balance, career progression and being financially healthy slightly more when compared to the wider global workforce.

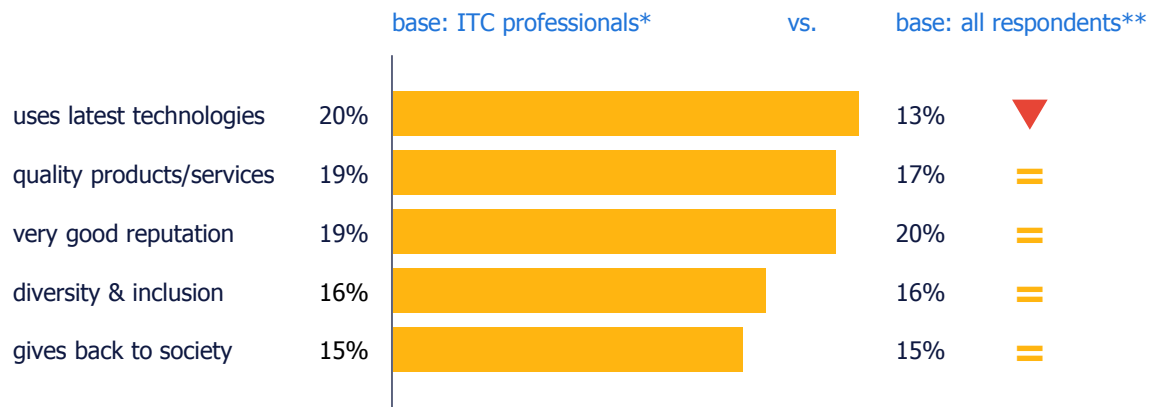
Financial health together with interesting job content are the only drivers that have gained significant importance compared with 2017.

* percentage highlighted blue or red, when the difference with 2017 data is 3 percent or higher

** arrow highlighted blue or red, when the difference with ITC professionals for 2018 is 3 percent or higher

what do ITC workers want vs. global employees.

least important reasons to choose an employer



while financially-driven attributes top the list of must-haves for the ideal employer, non-financial attributes are seen as less important by ITC professionals.

Although of lower importance compared to other aspects, using the latest technologies attracts ITC professionals significantly more than employees in other professions. A fifth of ITC workers mentions it in their top 5 wants.

* percentage highlighted blue or red, when the difference with 2017 data is 3 percent or higher
** arrow highlighted blue or red, when the difference with ITC professionals for 2018 is 3 percent or higher



employer exchange gap analysis global.

a gap between what employees seek and what employers offer is a valuable opportunity for your EVP.

ITC professionals seek

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

ITC employers offer

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

The most attractive attributes sought in employers are not currently globally aligned with the perceived core values of companies. Having said this, the ITC sector performs better than most other sectors in this respect. Almost all top drivers, including salary and benefits are more often attributed to companies in the ITC sector than to non-ITC companies.

The only driver in which the ITC could improve upon is offering job security. This is considered to be of high importance for ITC professionals, but ITC companies are generally perceived not to deliver upon it. This may have to do with the fast-moving pace of the industry.

please note that for comparison reasons a shortened list of 10 out of the original 16 drivers is shown above.
* the ITC sector relates to companies in IT, technology & communications.



what do ITC workers want

global differences.

1/2

gender

men

job security &
work-life balance

are equally as important for male ITC professionals (46%), while globally males place more value on job security (49%) than work-life balance (44%).

women

19%

of women in ITC find uses latest technology just as important as men do (21%). Globally, men find this aspect considerably more important than women (16% vs 9%)

women

40%

of women in ITC find a pleasant work atmosphere important, which is less than women globally (47%). The gap compared to men is also smaller in the ITC sector (3% vs 7% globally).

age

18-24

46%

of the ITC workforce aged 18-24 find career progression important. This is significantly higher than 45+ ITC professionals (29%) and also significantly higher compared to the global 18-24 workforce (41%).

25-44

work-life
balance

ranks #2 among the 25-44 y.o ITC workforce, while among the 18-24 y.o. it ranks #4 and #3 for the 45+ y.o. ITC professionals.

45+

53%

of the 45+ y.o. ITC workforce indicates job security as important, while among the ITC workforce younger than 25 y.o. this is 41%.

what do ITC workers want

global differences.

2/2

region

lat am

48%

of ITC professionals in Lat Am find a pleasant work atmosphere important, which is significantly higher when compared to the global ITC average (38%).

russia

73%

of ITC professionals in Russia find salary and benefits, which is much more than the global ITC average (58%).

north america

35%

of ITC professionals in North America find strong management important, while this is 29% among ITC professionals globally and 16% for professionals in EMEA.

education

lower educated

31%

of lower educated IT professionals place value on good training, while for the higher educated ITC professionals this is 24%.

middle educated

49%

of the middle educated ITC workforce find job security important. This is higher than the lower and higher educated ITC workforce (respectively 42% and 44%).

higher educated

40%

of higher educated ITC workforce find financial health important. This is higher than the lower and the middle educated ITC professionals (32% and 37% respectively).

what do ITC workers want gender and region.

1/3

salary, security and work-life balance dominate in what ITC workers want and are fairly uniform across the globe for people working in this sector.



north america

women

- salary & benefits
- work-life balance
- job security
- strong management
- location

men

- salary & benefits
- job security
- work-life balance
- financially healthy
- strong management

● driver is ranked higher than for ITC professionals globally



lat am

women

- salary & benefits
- career progression
- work atmosphere
- flexible arrangements
- work-life balance

men

- salary & benefits
- career progression
- work atmosphere
- job security
- flexible arrangements

what do ITC workers want gender and region.

2/3

salary, security and work-life balance dominate in what ITC workers want and are fairly uniform across the globe for people working in this sector.



EMEA

women

- salary & benefits
- work-life balance
- work atmosphere
- job security
- flexible arrangements

men

- salary & benefits
- work-life balance
- job security
- work atmosphere
- interesting job content

● driver is ranked higher than for ITC professionals globally



APAC

women

- salary & benefits
- work-life balance
- career progression
- job security
- work atmosphere

men

- salary & benefits
- work-life balance
- career progression
- job security
- financially healthy

what do ITC workers want

gender and region.

3/3

salary, security and work-life balance dominate in what ITC workers want and are fairly uniform across the globe for people working in this sector.



russia

women

- salary & benefits
- financially healthy
- interesting job content
- career progression
- flexible arrangements

men

- salary & benefits
- financially healthy
- interesting job content
- job security
- career progression

-
- driver is ranked higher than for ITC professionals globally

what drives ITC professionals.

1/4

percentage of total population vs. ITC professionals who rank 'work-life balance' in their top five most important factors when choosing a company to work for.

Globally ranked #2 among ITC professionals (behind salary & benefits), the importance of work-life balance differs strongly by region, gender and age.

It is especially valued by women, those aged 25-65 and by professionals in APAC and EMEA.

In all regions but Russia, the 45+ y.o. ITC professionals show to value work-life balance more than the wider regional workforce.



what drives ITC professionals.

2/4

percentage of total population vs. ITC professionals who rank 'work-life balance' in their top five most important factors when choosing a company to work for.



north america

age	all	ITC
18-24	43%	low base
25-44	46%	44%
45-65	45%	52%
male	44%	44%
female	47%	50%

● the difference with the wider regional importance is 5% or higher/lower



lat am

age	all	ITC
18-24	30%	28%*
25-44	35%	36%
45-65	34%	39%
male	32%	34%
female	36%	39%

* indicative results as a result of low base size



what drives ITC professionals.

2/3

percentage of total population vs. ITC professionals who rank 'work-life balance' in their top five most important factors when choosing a company to work for.



EMEA

age	all	ITC
18-24	41%	39%
25-44	49%	49%
45-65	45%	50%
male	44%	48%
female	50%	52%

● the difference with the wider regional importance is 5% or higher/lower



APAC

age	all	ITC
18-24	45%	43%
25-44	48%	50%
45-65	47%	52%
male	46%	48%
female	48%	52%

* indicative results as a result of low base size



what drives ITC professionals.

3/3

percentage of total population vs. ITC professionals who rank 'work-life balance' in their top five most important factors when choosing a company to work for.



russia

	all	ITC
age 18-24	28%	35%*
age 25-44	32%	29%
age 45-65	34%	35%
male	35%	35%
female	30%	25%

● the difference with the wider regional importance is 5% or higher/lower

* indicative results as a result of low base size



what do ITC workers want summary.

1/3

Standard factors such as salary & benefits, job security and work-life balance dominate in what workers want and are fairly uniform across the globe for people working in ITC.

ITC professionals still attach little value to CSR or to diversity and inclusion at work. However, while currently of lesser importance, the longer term trend suggests these topics are slowly gaining ground over time thanks to the buzz that is circulating around them.

Because of the scarcity of talent, ITC companies are more often deciding on what skills they should hire and what skills they should equip their current employees with.

This topic becomes even more relevant when considering that an increasing amount of skills within the ITC sector are very new, requires specific training and cannot be recruited.



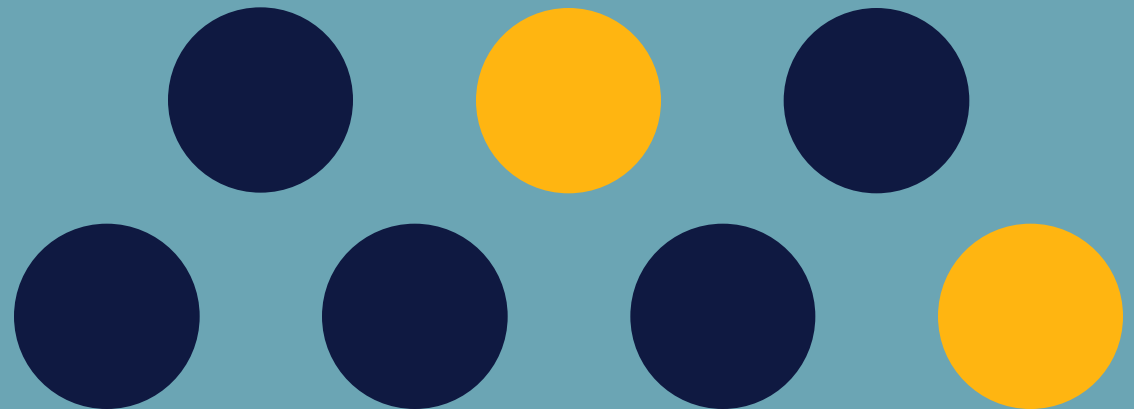
what do ITC workers want summary.

2/3

Although ITC professionals do not currently consider good training to be of very high importance, customized training programs for employees are likely to become of greater importance in the future.

As ITC work is increasingly being done off-site, a pleasant work atmosphere is generally perceived as less important compared with the wider global workforce. This difference particularly exists among

women (in ITC 40%, globally 47%). The increasing amount of off-site work also explains the increasing importance of interesting job content.



what do ITC workers want **summary.**

3/3

- There are opportunities for employers to develop a targeted hiring plan to attract the young ITC talent (particularly females).
- Companies should take into account that good training, career progression opportunities and strong management appeal more to the 18-24 y.o. and that women in ITC are more attracted by strong management, work life balance and flexible working arrangements.
- Especially in EMEA the latter 2 are considered particularly important by ITC women, which is likely due to family responsibilities.



switching



behavior.

switching jobs

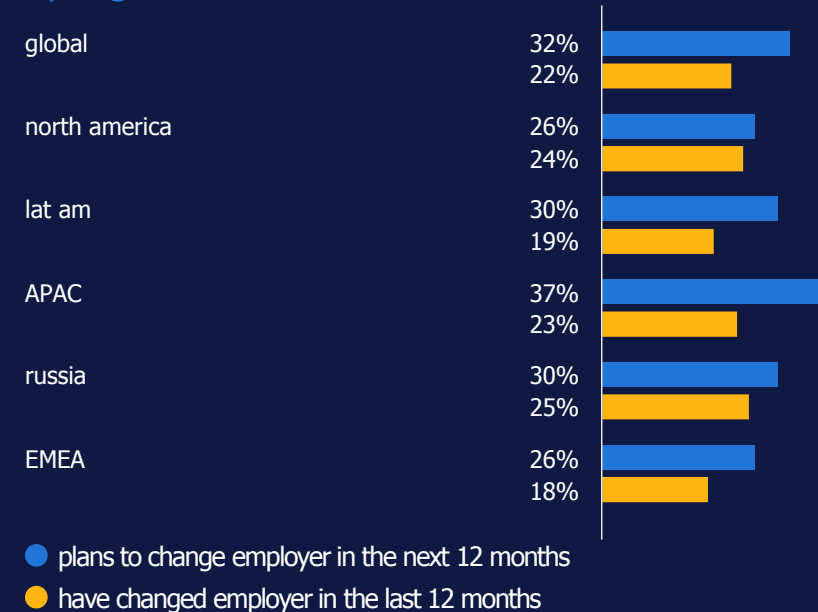
ITC professionals behavior.

Talent in ITC is scarce and sought by a wide range of companies. Having more job opportunities, ITC professionals plan to switch jobs more frequently and also have done so more in the last 12 months than the global average (22% vs 18%).

Retaining ITC professionals in APAC seems to be particularly difficult. While in the total APAC workforce (not only ITC professionals) only 28% plans to change job, 37% of ITC professionals do so in this region.

This is in line with the fact that in this region ITC professionals put greater value on career progression (45%) when compared to the wider workforce (40%).

by region



switching jobs

ITC professionals behavior.

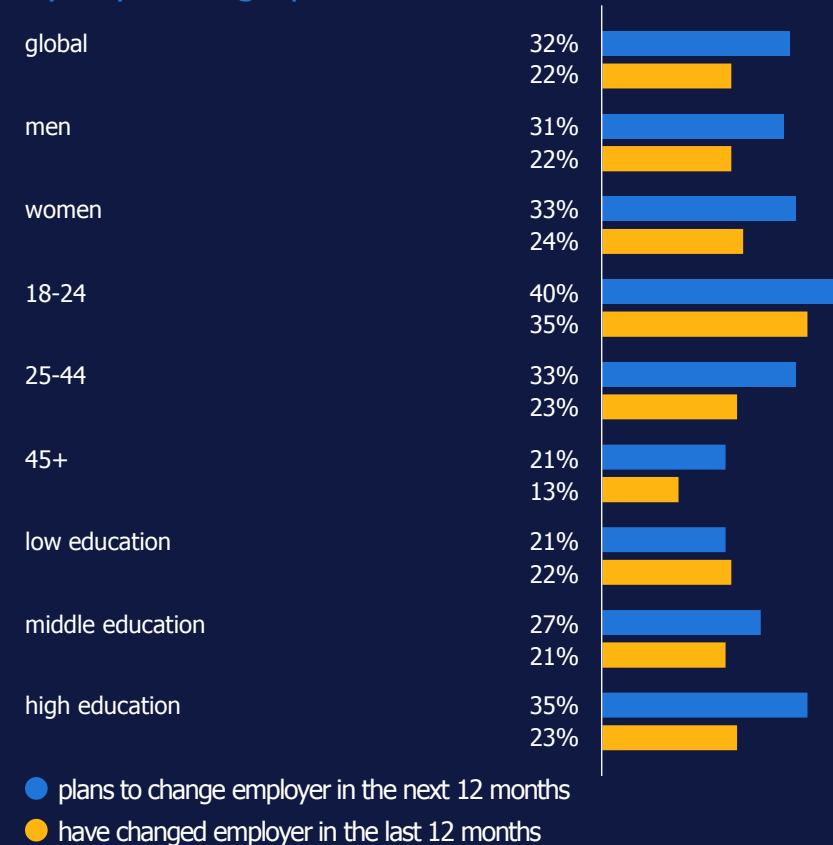
Across key demographics we see that retention of ITC professionals is more difficult than it is in the case of the global workforce. For women (24% vs 18% global) and the 18-24 y.o. (35% vs 28% global) this gap is the biggest.

As diversity & inclusion in the workplace is gaining importance, the demand for women (a small segment of an already small pool of talent), will grow strongly.

Highly educated ITC professionals are more inclined to change employer, but the level of education did not play a differentiating role for actually doing so.

The 45+ y.o. ITC professionals value job security more than their younger peers and as such their switching intention and behavior is less pronounced.

by key demographic



EVP drivers ITC professionals attraction vs. retention.



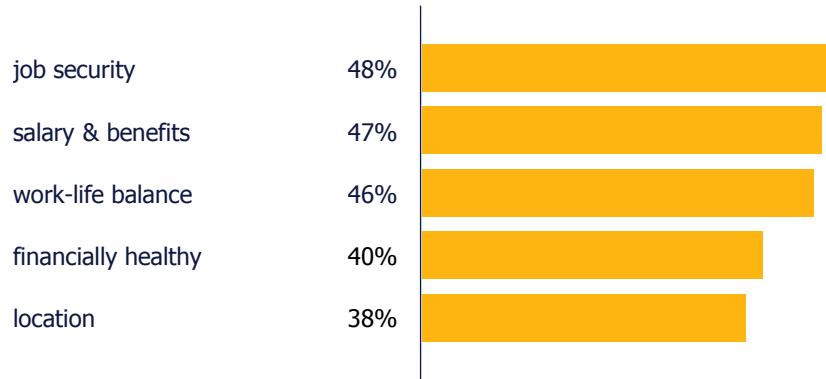
Salary & benefits, job security and work-life balance should always be focus points for employers as they contribute most to both attracting as retaining employees.

Although a number of attributes are ranked in low importance and low attraction these drivers should not be neglected when developing your employer brand.



EVP drivers ITC professionals retention.

top 5 factors contributing most to stay with current employer



differences

18-24 y.o.

career progression

is ranked the #3 most important factor for staying with the current employer among 18-24 y.o. ITC professionals, while this is ranked #8 among the wider ITC workforce.

women

49%

of women indicate work-life balance to be an important driver for staying making it the strongest retention driver among this subgroup. For men this is only 44%.

lower educated

45%

of lower educated ITC professionals find location important, which is significantly different than the higher educated ITC professionals (36%).

EMEA and russia

43%

of ITC professionals in EMEA and Russia find interesting job content important, which is significantly higher than ITC professionals elsewhere on the globe (28% in North America and 26% in APAC).

APAC

27%

of the ITC workforce in APAC finds flexible arrangements important, which is less when compared to ITC workforce in EMEA (38%) and North America and Russia (37%).

lat am

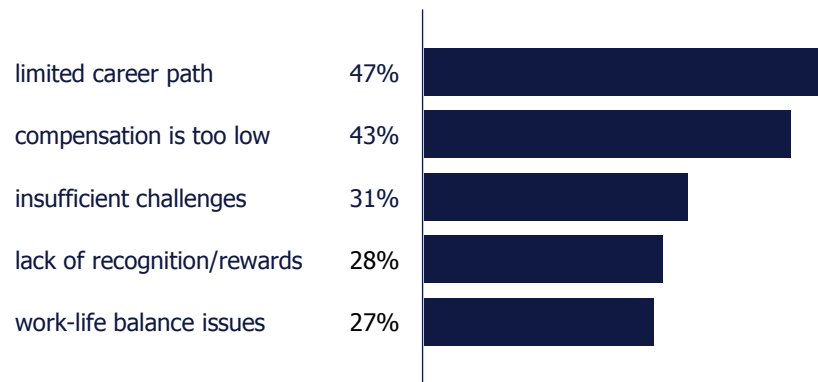
42%

of ITC professionals in Latin America find pleasant work atmosphere important, making it the 2nd most important driver, while this is 35% for the global ITC workforce and ranked #6.



factors driving ITC professionals away.

top 5 factors contributing to start looking for a new employer



While the global workforce is most likely to leave an employer due to too low compensation, a limited career path is the biggest bottleneck for the ITC sector to lose professionals.

A limited career path is more often a reason of leaving for ITC professionals than for the global workforce for: the 18-24 y.o., the higher educated, women and workers in APAC.

differences

age

limited career path

limited career path is the #1 factor to look for a new employer among workforce younger than 44 while for the 45+ workforce it's about too low compensation (46%).

region

work-life balance issues

and insufficient challenges are considerably less often named as factors driving ITC professionals away in Latin America (16%, 19% resp.) than for the global ITC employee (27%, 31%).

education

37%

of lower educated ITC professionals mention a financially unstable organization as a reason to leave (#3), while this is not in the top 5 reasons of the middle and higher educated (24% globally).

switching behavior

ITC job search channels.

Job search engines/boards are the most used channels to look for jobs, especially for ITC professionals aged 25-44 y.o.

To reach the younger ITC workforce and women in ITC, job fairs are of relative higher importance for employers. The 45+ workforce tend to look for jobs through personal connections/referrals (50%).

In general, offline channels are used less often and a strong focus on online platforms, as well as on the company career sites is advised for the future.

* based on those who have changed jobs/ planning to change in the next year

top 5 channels used to look for a job*



switching behavior summary.

Although in general the jobs are liked by ITC employees, retention is a big issue in this sector. Simply hiring your way out of the ITC skills shortage therefore becomes increasingly difficult.

In some regions/countries the working-culture of ITC can be quite harsh and together with the fact that ITC companies are generally not well perceived for offering job security (the top retention driver), results in more work pressure and burn-outs.

The regional differences in ITC working-culture also show in the switching behavior and main reasons to do so.

An example of this can be seen in the APAC region: 37% of ITC professionals in this region plan to change jobs in the next 12 months and therefore a stronger focus on offering a good work-life balance, job security and

career progression opportunities is advised. Flexible working arrangements is of lower importance.

Although in APAC career progression is highly valued and plans of changing are high as well, ITC employees in this region did not actually change employer significantly more in the last year.

This gap could be a result of employees being less open and flexible to change than ITC employees in other regions (APAC 49% vs 62% in North America and Lat Am).

switching behavior summary.

- Gender diversity in general and women in leadership roles remain an issue in the ITC sector and the retention issues among women generally in the ITC sector are even bigger.
- For women, a limited career path is by far the main reason to leave a company (51%).
- To create a stronger culture of women leaders, employers need to tailor their retention strategy and put greater emphasis on the retention drivers women value more such as work-life balance, location and flexible arrangements.
- However, as the majority of ITC professionals are still male (72% based on our study), their wants for staying should also be met. Internally emphasizing the financial health of your company, along with providing enough recognition, rewards and compensation will keep them from leaving.



how attractive

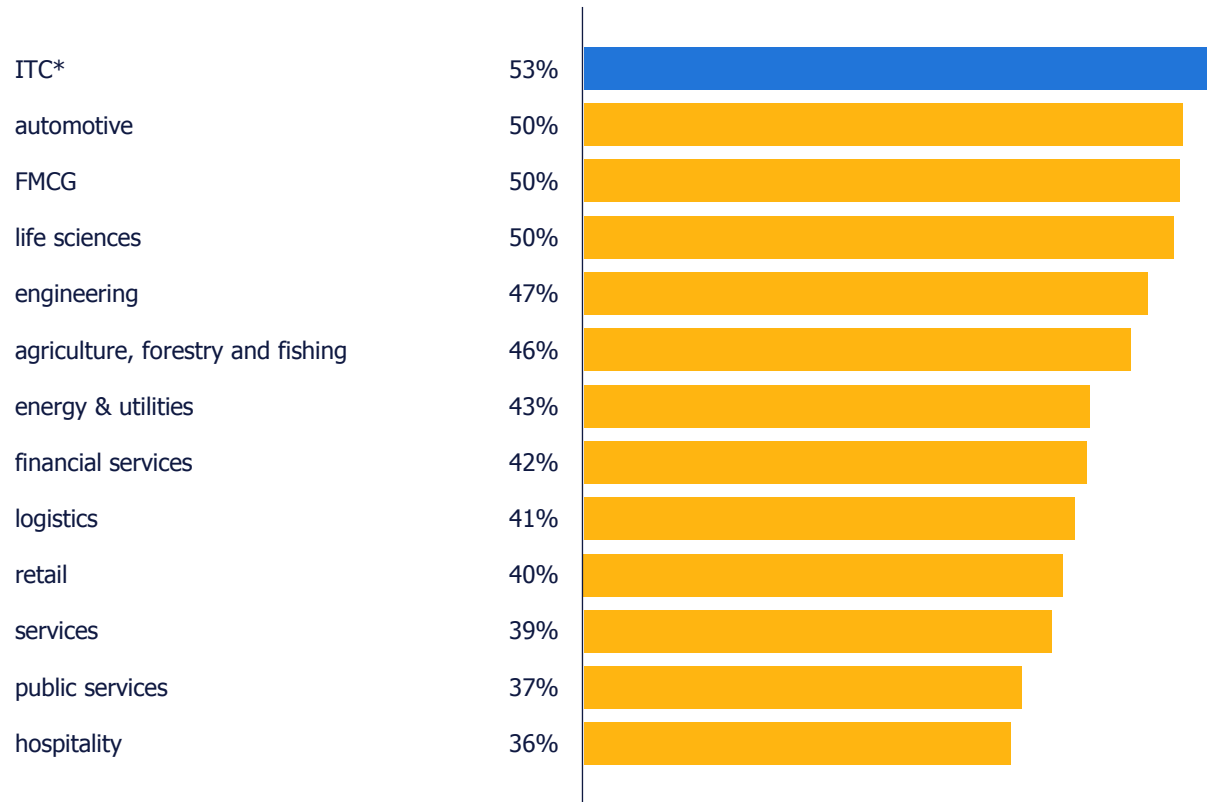


is the sector.

sector attractiveness global.

the global workforce is most willing to work for ITC companies.

sector attractiveness



The information technology (IT) sector is foreseen to grow by 5%.

The information and communication technology sector (ICT), comprising a wide range of activities from electronic components to telecommunication services, will continue to enjoy dynamic growth.

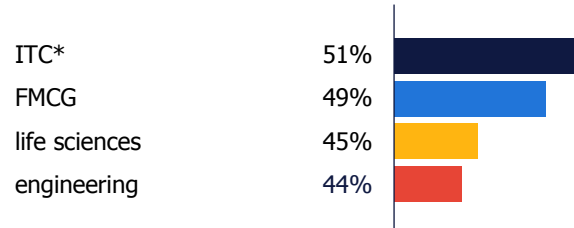
IT trends that are likely to have an impact on how businesses interact with customers, as well as how employees work.

* the ITC sector relates to companies in IT, technology & communications

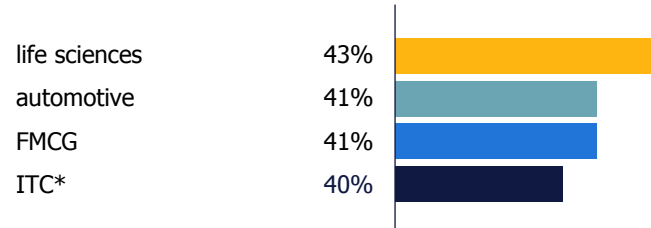


ITC sector attractiveness by region.

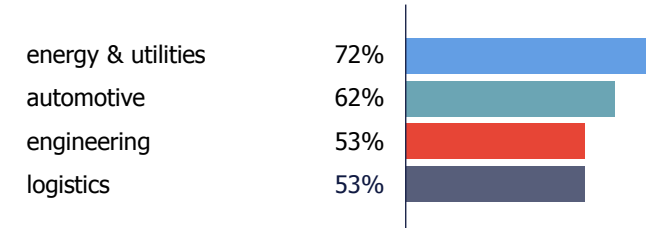
north america



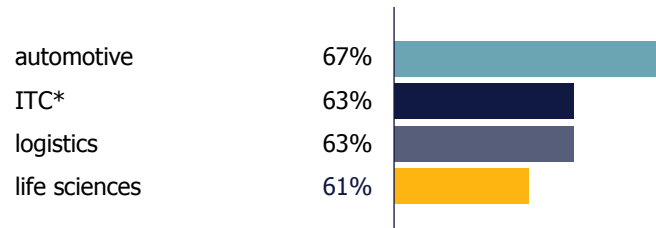
EMEA



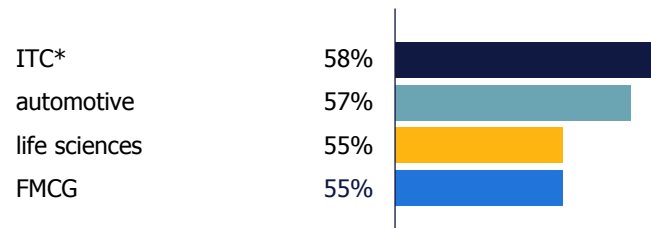
russia



lat am



APAC



ITC, life sciences and automotive top the rankings in four out of the five regions.

Being the home ground of some world players in ITC, the ITC sector is leading the charts in North America.

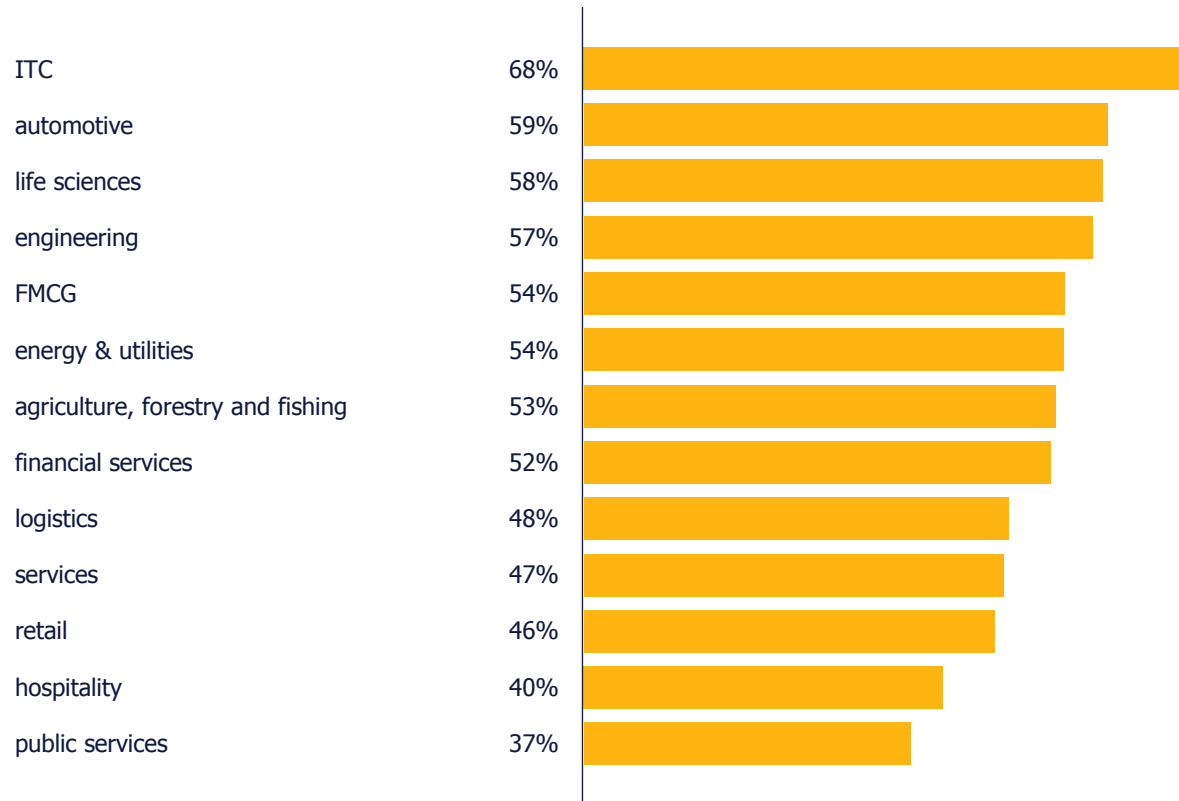
Russia is the only region where ITC does not rank as a leading sector.

* the ITC sector relates to companies in IT, technology & communications



sector fluidity ITC professionals global.

attractiveness sectors base ITC professionals



Having a high sector attractiveness among professionals in ITC means a large proportion of ITC workers are willing to work for a different sector, and therefore might be at risk of switching.

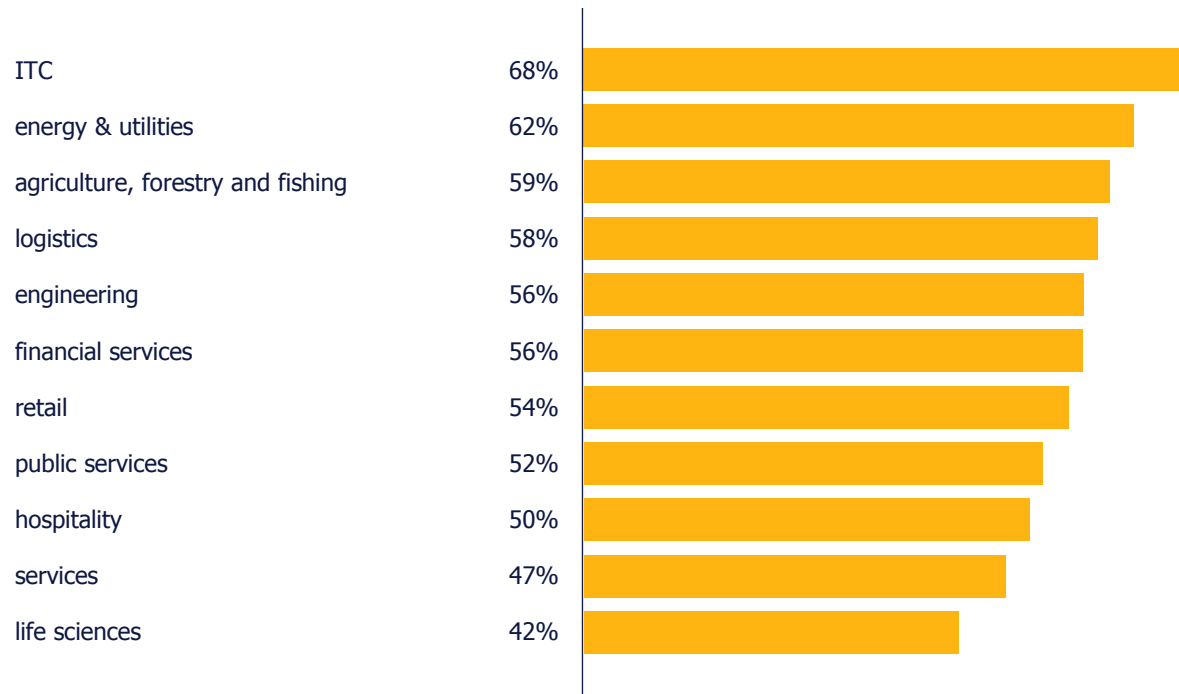
Across all sectors ITC professionals are shown to be the most open-minded and the risk of losing them to other attractive sectors is high (e.g. automotive (59%), life sciences (58%) and engineering (57%)).

* please note that the sector definitions based on job function and those based on companies is not the same



sector fluidity ITC sector attractiveness.

attractiveness ITC sector base: respondent sector*



A high attractiveness of the ITC sector among employees working in certain sectors means that the ITC sector is in a strong position to target these sectors to attract talent.

Attractiveness of the ITC sector is high: regardless of the sector they currently work in, employees indicate a high willingness to work in ITC.

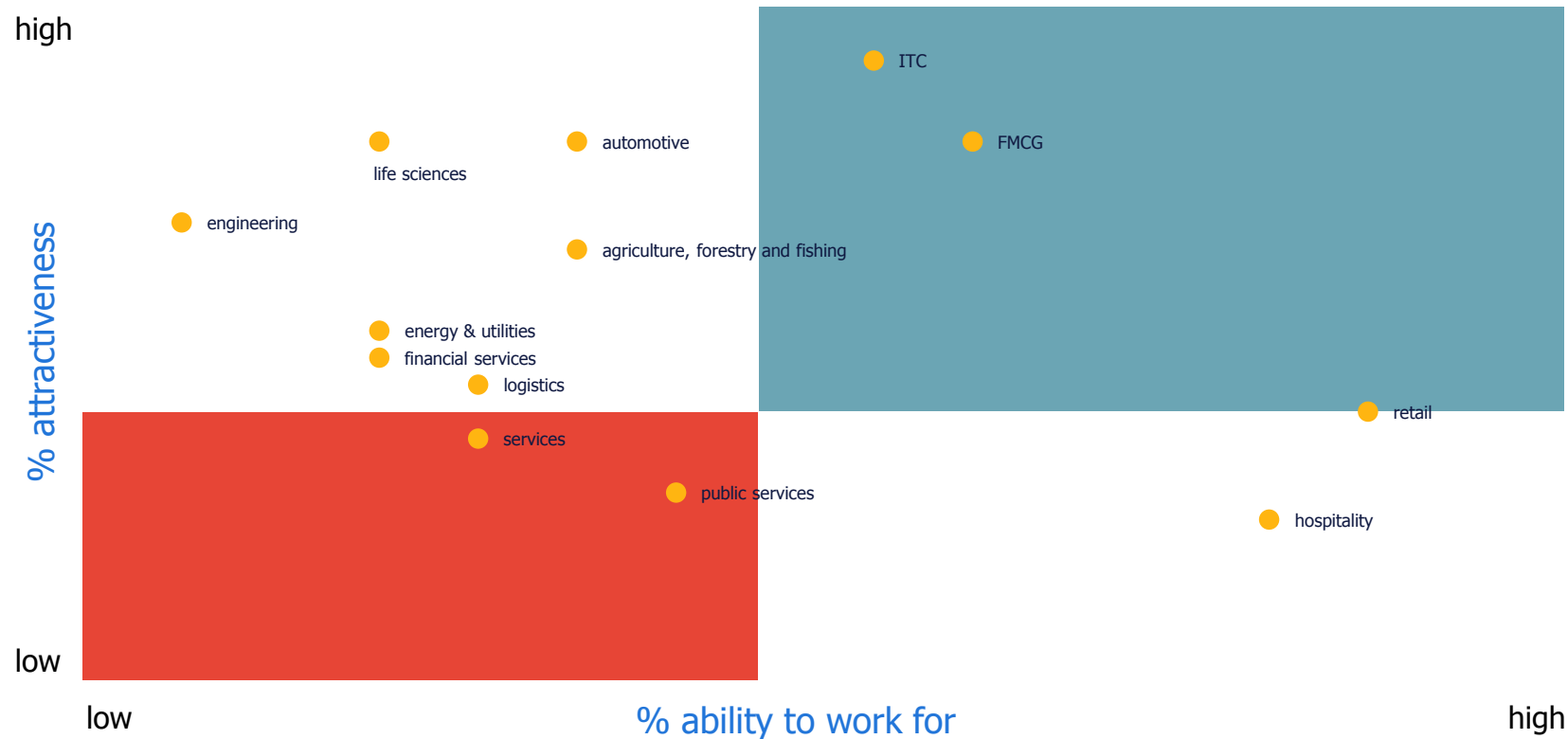
The ITC sector is most attractive among professionals in energy & utilities and least attractive among professionals in services and life sciences.

* please note that the sector definitions based on job function and those based on companies is not the same



sector attractiveness vs ability to work for it.

workers perceived abilities should not be overlooked when attracting ITC talent



Employees are more often willing to work for a sector than they feel they are to actually be able to work in.

ITC is the most attractive sector, but only 38% of employees feel able to work in this sector. The other attractive sectors struggle with this aspect as well.

Retail and Hospitality are the only exceptions for which, although being relatively unattractive, more employees indicate to be able to work in.



sector attractiveness summary.

1/2

- As in 2017, the willingness to work for an employer is highest for the ITC sector, which is in line with the values it is attributed with. More than half of the global workforce are willing to work for the sector and is particularly attractive among the younger and higher educated workforce.
- ITC job functions are available in almost every sector, so the risk of losing them to other sectors is high. Building a strong employer brand remains hugely important as willingness to work for competitive sectors among ITC professionals is for every sector higher than for the global wider workforce.
- Employees in Life Sciences show the lowest willingness to work for ITC companies, but the risk of losing ITC professionals to this sector is high (58%). This can be explained by the fact that ITC professions can be found in all sectors, but employees in Life Sciences have often made a deliberate choice to work in human health/social work.



sector attractiveness

summary.

2/2

- Although a lot of people are willing to work for the ITC sector, most of the workforce does not feel to be able to work for companies in this sector taking into account their current skills. For ITC this issue particularly exists among women, those of higher age and those with lower level education.
- The industry needs to develop better training programs and should communicate them effectively to persuade these workers to expand their horizon and to consider to apply for companies in the ITC sector.



appendix.

- 1 what do ITC workers want – country comparison
- 2 what do ITC workers want – trend analysis
- 3 about the research



what do workers
want

country comparison.



what do ITC workers want by country.

1/3

	argentina	australia	austria	brazil	belgium	canada	china	czech rep.	dubai	france
salary & benefits	65%	57%	63%	56%	65%	61%	60%	75%	67%	57%
work-life balance	45%	55%	45%	33%	51%	50%	51%	35%	45%	46%
job security	55%	45%	53%	35%	48%	44%	47%	56%	40%	40%
work atmosphere	54%	31%	52%	47%	46%	40%	41%	45%	22%	57%
career progression	59%	38%	37%	50%	36%	40%	53%	44%	48%	43%
flexible arrangements	48%	35%	56%	37%	44%	36%	25%	23%	17%	37%
financially healthy	18%	28%	33%	31%	32%	30%	45%	46%	31%	28%
interesting job content	30%	26%	43%	15%	30%	24%	17%	51%	21%	40%
location	15%	38%	25%	20%	42%	31%	25%	25%	15%	30%
good training	24%	33%	17%	32%	23%	28%	25%	13%	32%	24%
strong management	12%	33%	14%	34%	16%	26%	33%	13%	43%	14%
uses latest technologies	25%	19%	14%	26%	18%	16%	15%	21%	26%	19%
very good reputation	12%	22%	9%	18%	14%	20%	10%	18%	30%	13%
quality products	7%	13%	14%	18%	12%	18%	21%	14%	22%	23%
gives back to society	15%	13%	16%	23%	12%	9%	14%	7%	22%	15%
diversity & inclusion	12%	15%	9%	18%	11%	19%	17%	10%	18%	15%



what do ITC workers want by country.

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	germany	greece	hong kong	hungary	india	italy	japan	luxem- bourg	malaysia	new zealand
salary & benefits	62%	75%	66%	78%	47%	52%	63%	72%	69%	62%
work-life balance	45%	40%	65%	51%	47%	54%	43%	45%	54%	49%
job security	57%	44%	41%	49%	42%	43%	40%	50%	37%	52%
work atmosphere	54%	56%	35%	60%	24%	42%	56%	26%	34%	33%
career progression	30%	52%	43%	35%	39%	38%	26%	31%	38%	39%
flexible arrangements	41%	31%	32%	43%	28%	30%	32%	53%	38%	38%
financially healthy	41%	25%	37%	50%	32%	38%	28%	44%	37%	30%
interesting job content	36%	19%	24%	21%	23%	35%	37%	31%	19%	27%
location	25%	21%	26%	23%	21%	25%	28%	33%	30%	25%
good training	20%	27%	23%	22%	30%	33%	20%	14%	23%	33%
strong management	9%	19%	27%	17%	37%	19%	23%	12%	45%	33%
uses latest technologies	16%	21%	17%	13%	37%	21%	11%	25%	17%	17%
very good reputation	19%	23%	21%	5%	32%	20%	17%	16%	19%	18%
quality products	11%	20%	13%	11%	21%	16%	23%	11%	14%	16%
gives back to society	16%	16%	9%	9%	21%	13%	14%	15%	11%	12%
diversity & inclusion	12%	10%	11%	11%	17%	11%	17%	14%	14%	13%

what do ITC workers want by country.

3/3

	nether-lands	poland	portugal	russia	singapore	spain	sweden	switzer-land	UK	US
salary & benefits	72%	81%	67%	73%	67%	62%	47%	63%	52%	55%
work-life balance	51%	52%	50%	31%	63%	53%	47%	45%	50%	45%
job security	38%	59%	46%	41%	42%	43%	39%	44%	46%	49%
work atmosphere	52%	40%	51%	32%	35%	45%	52%	53%	29%	28%
career progression	39%	41%	49%	43%	39%	44%	35%	30%	30%	31%
flexible arrangements	49%	30%	32%	36%	36%	43%	54%	52%	34%	29%
financially healthy	30%	31%	35%	63%	34%	24%	19%	35%	31%	39%
interesting job content	52%	38%	23%	46%	20%	37%	58%	39%	28%	25%
location	38%	27%	22%	28%	30%	26%	18%	24%	38%	30%
good training	18%	29%	33%	18%	30%	28%	18%	18%	31%	29%
strong management	14%	8%	19%	20%	33%	12%	30%	10%	29%	36%
uses latest technologies	14%	17%	18%	21%	12%	22%	12%	21%	24%	23%
very good reputation	5%	18%	12%	19%	15%	20%	18%	17%	25%	25%
quality products	13%	13%	13%	12%	11%	13%	17%	16%	16%	20%
gives back to society	8%	8%	13%	7%	11%	13%	16%	17%	16%	16%
diversity & inclusion	5%	10%	11%	7%	19%	10%	15%	11%	16%	18%



what do ITC workers want

country level summary.

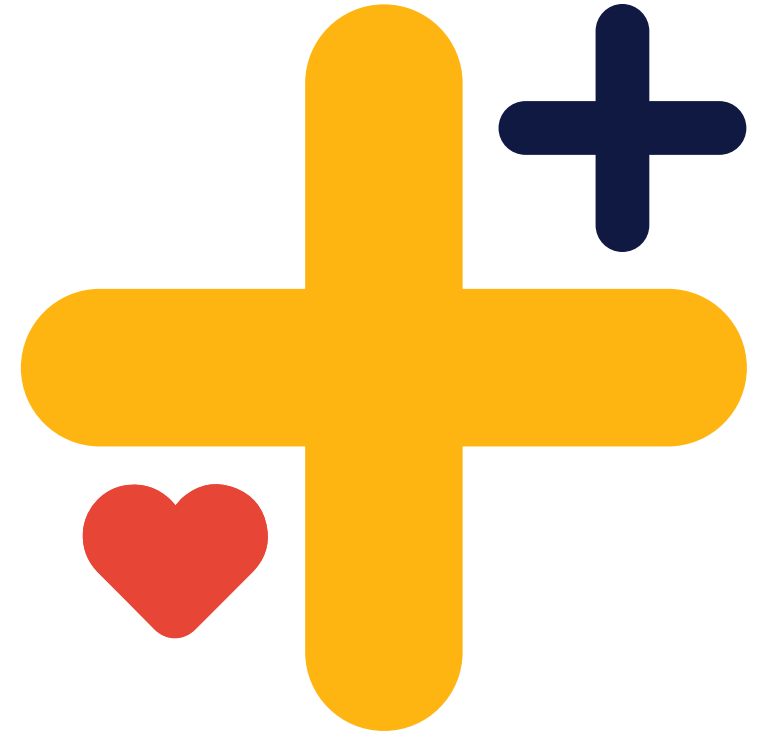
- Attractive salary and benefits is consistently the highest scoring driver across all countries with the exception of Italy and Sweden where they are most drawn towards a good work-life balance and interesting job content, respectively. On the contrary, ITC workers in Brazil, China and Greece rate interesting job content lower than their peers elsewhere in the world.
- Indian ITC workers rate financial and career driven factors particularly high at the expense of social drivers; they also rate the use of latest technology highest when compared to fellow ITC workers in other parts of the world.



what do ITC workers want

country level summary.

- A good work-life balance is the second most important driver worldwide. However, ITC workers in Czech Republic, Brazil and Russia place much less value in this factor. In turn they respectively find job security, career progression opportunities and financial health the second most important aspect after attractive salary and benefits.
- Career progression opportunities of lower importance for ITC workers in Japan, Germany, UK and Switzerland and more important in Argentina and China.
- One may argue that career progression may be achieved through good training. ITC workers in New Zealand, Portugal and Italy value the provision of good training higher than their peers do elsewhere. On the contrary, ITC workers in Czech Republic, Luxembourg and Austria see less of a value in the provision of good training by their ideal employer.



what do workers
want



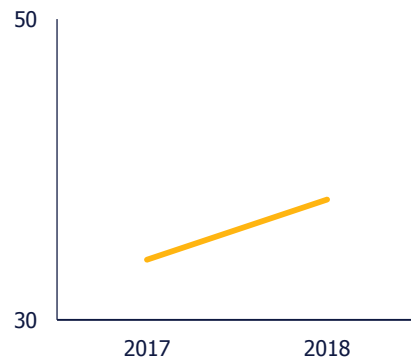
trend analysis.

what do ITC workers want

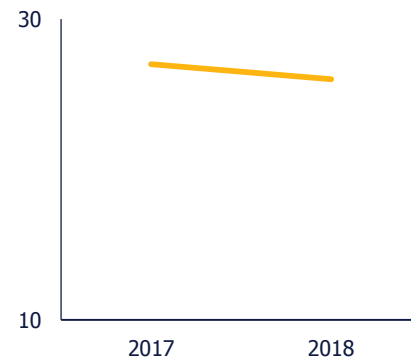
global trends.

1/2

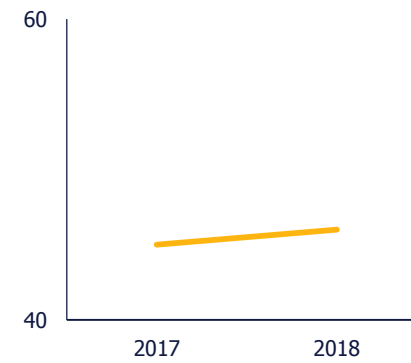
financially healthy



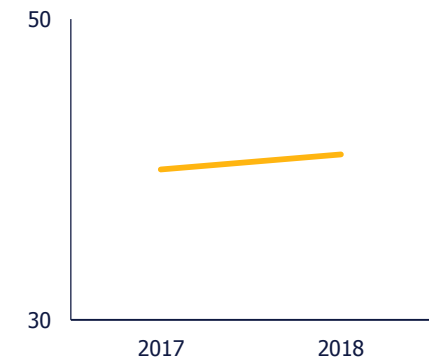
good training



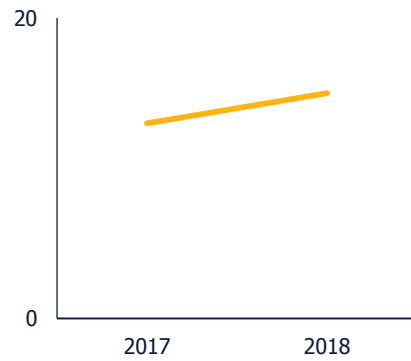
job security



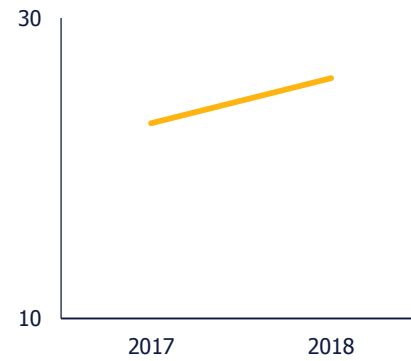
career progression



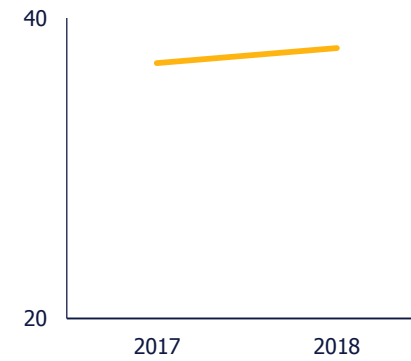
gives back to society



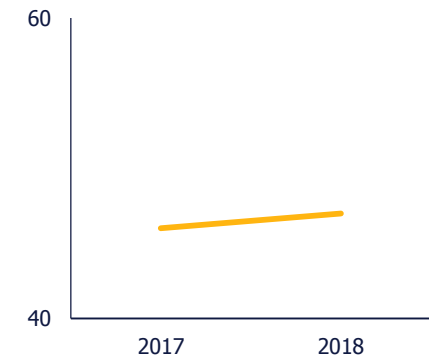
interesting job content



work atmosphere



work-life balance

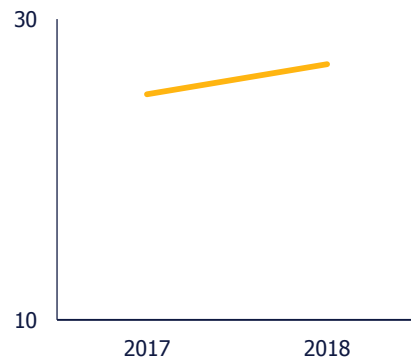


what do ITC workers want

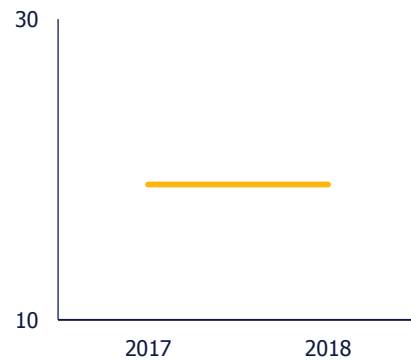
global trends.

2/2

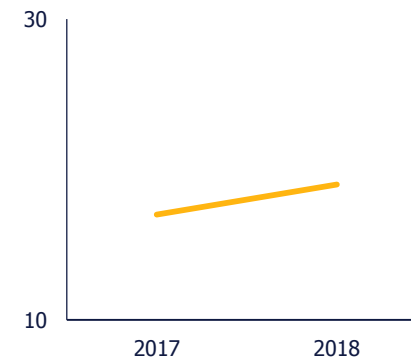
location



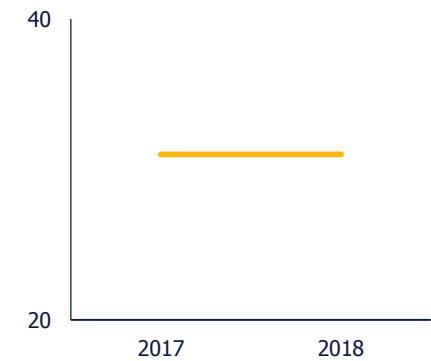
very good reputation



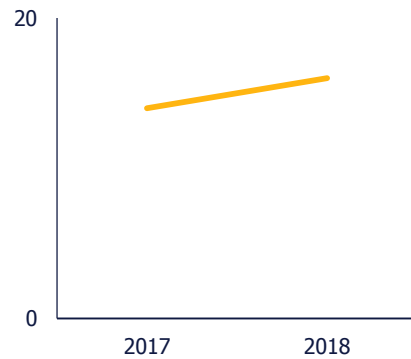
quality products



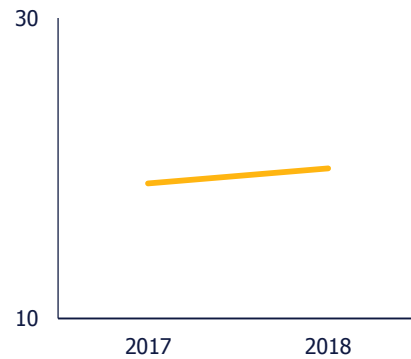
flexible arrangements*



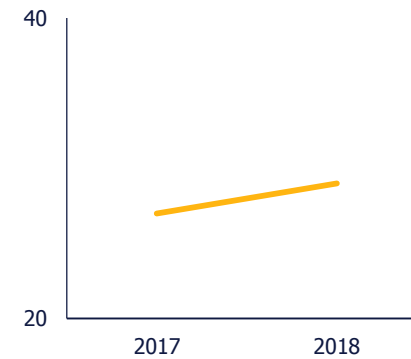
diversity & inclusion



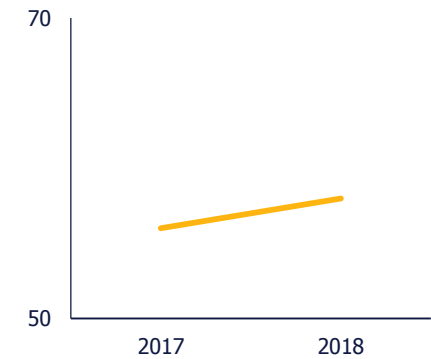
uses latest technologies



strong management



salary & benefits



*flexitime, teleworking, etc.

about the



research.

what is the randstad employer brand research.

- **representative employer brand research** based on perceptions of the general audience. Optimizing 17 years of successful employer branding insights.
- **independent survey** with over 175,000 respondents in 30 countries worldwide.
- **reflection of sector attractiveness** is based on employers known by at least 10% of the population.
- **valuable insights** to help employers shape their employer brand.



30 countries surveyed covering more than 75% of the global economy.

austria
australia
argentina
belgium
brazil
canada
china
czech republic
dubai
france
germany
greece
hong kong
hungary
italy
india
japan
luxembourg
malaysia
new zealand
netherlands
poland
portugal
russia
singapore
spain
sweden
switzerland
UK
USA



worldwide

- over 175,000 respondents
- 5,755 companies surveyed

sample

- aged 18 to 65
- representative on gender
- overrepresented on age 25 – 44
- comprised of students, employed and unemployed workforce

country

- 1,565 to 12,332 respondents
see appendix for breakdown of respondents per country

fieldwork

- online interviews
- between 10 November and 28 December 2017

length of interview

- 16 minutes

breakdown respondents by country.

country	n=	country	n=
argentina	4230	italy	5855
australia	9555	japan	7105
austria	7507	luxembourg	1565
belgium	12046	malaysia	3308
brazil	4284	new zealand	3757
canada	4528	poland	5923
china	5691	portugal	6752
czech republic	7476	russia	9431
dubai	2501	singapore	3813
france	6440	spain	6822
germany	4322	sweden	5139
greece	7435	switzerland	4799
hong kong	4295	the netherlands	12332
hungary	8201	UK	5703
india	3009	USA	4813

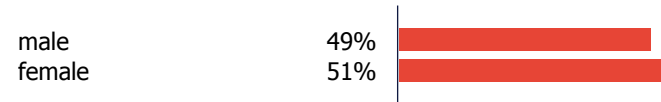


sample composition

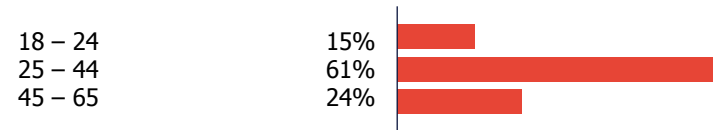
socio-demographics, employment situation, region.

1/2

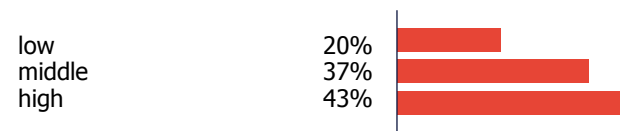
gender



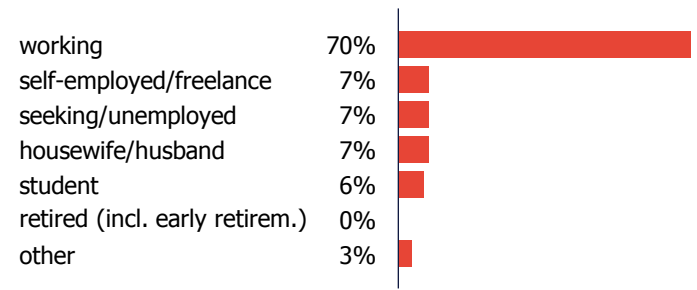
age



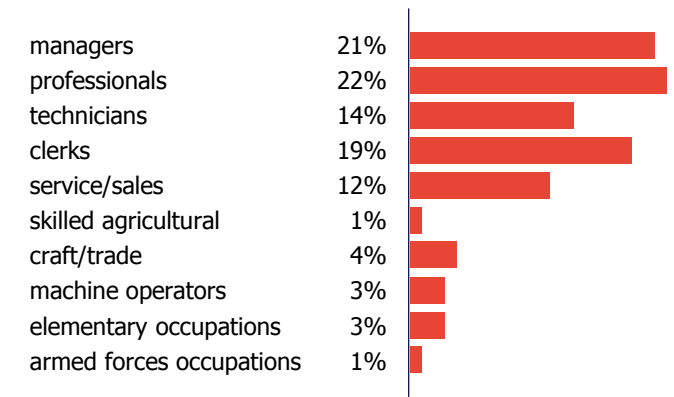
education



working situation



function

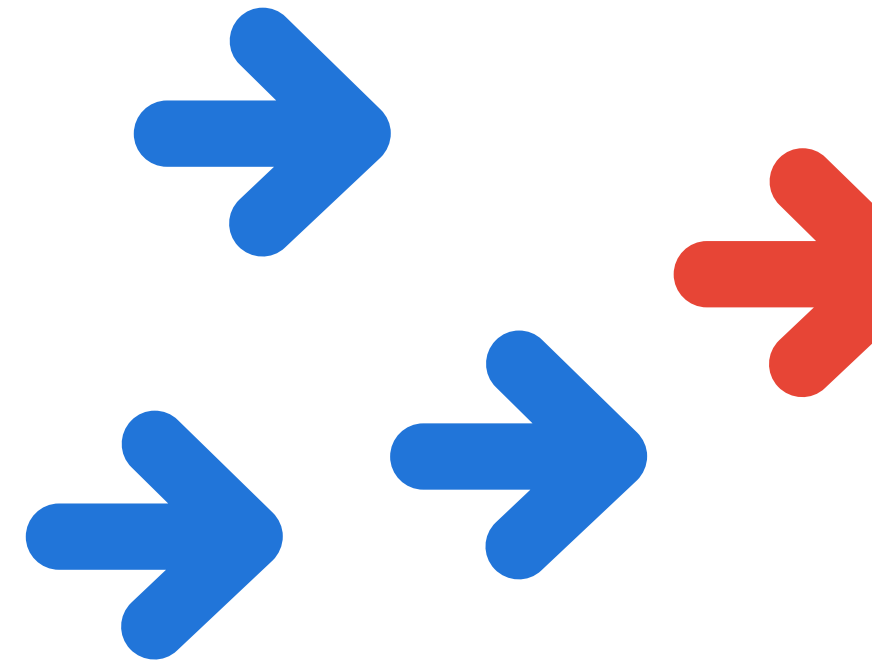
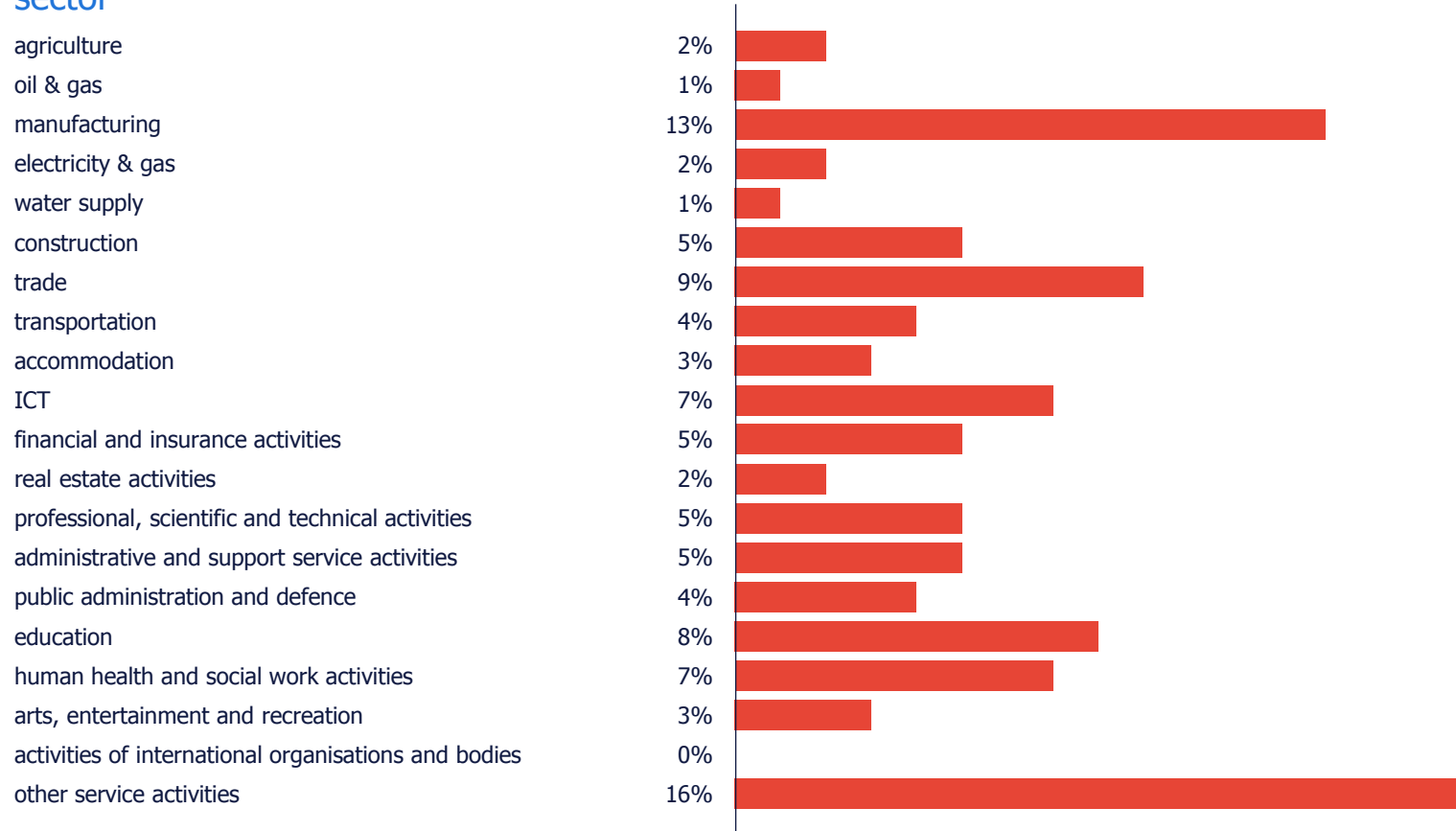


sample composition

socio-demographics, employment situation, region.

2/2

sector



the employer brand roadmap.



randstad

human forward.

