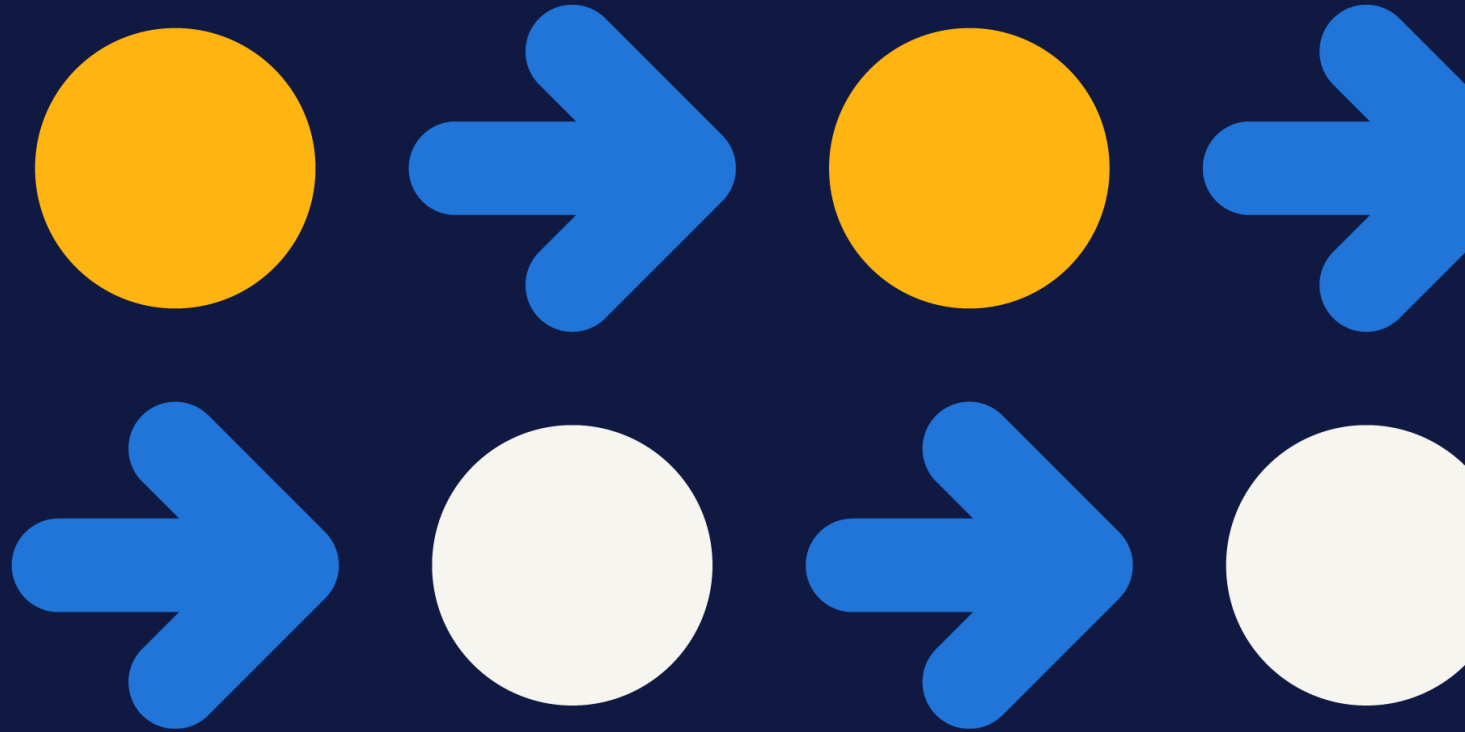


# employer brand research 2021



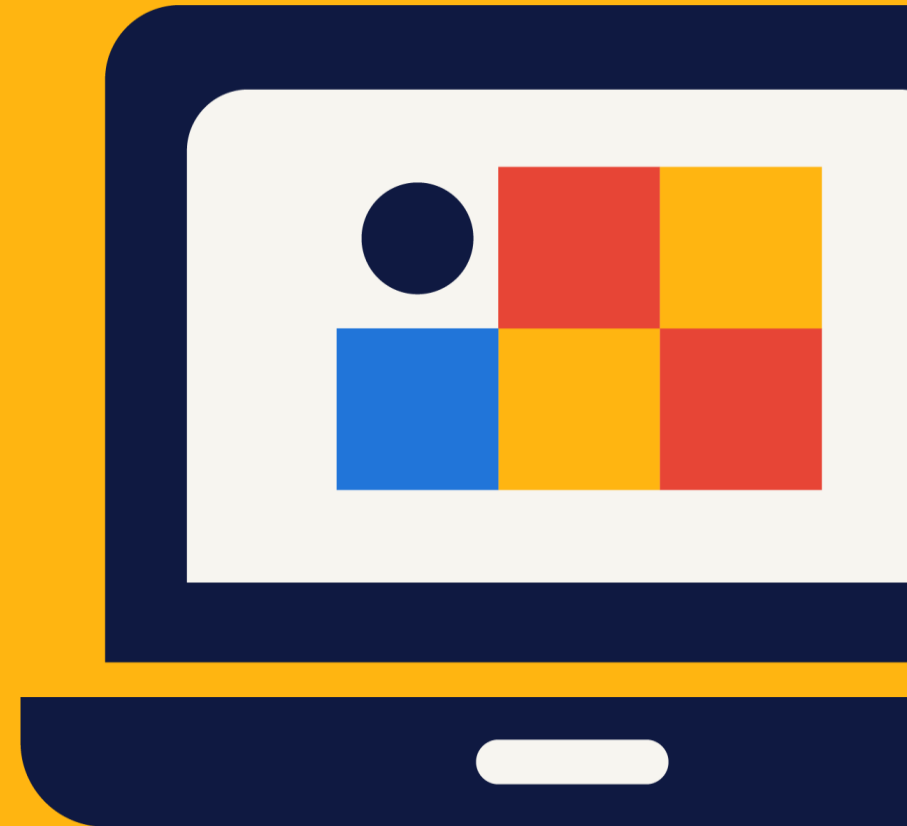
usa.

 randstad

human forward.

# content.

- 1 introduction
- 2 employer attractiveness
- 3 switching behavior
- 4 COVID-19 in focus
- 5 further reading



# what is the randstad employer brand research?

- a representative employer brand research based on perceptions of the general audience. Optimizing over 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 the market's 150 largest employers known by at least 10% of the population.
- provides valuable insights to help employers shape their employer brand.



# the employer brand roadmap.



# 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.

# why employer branding matters.

---

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>

---

1-2x

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

---

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>

---

52%

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



# 34 markets surveyed covering more than 80% of the global economy.

argentina  
australia  
austria  
belgium  
brazil  
canada  
china  
czech republic  
france  
germany  
greece  
hong kong SAR  
hungary  
india  
italy  
japan  
kazakhstan  
luxembourg  
malaysia  
mexico  
new zealand  
norway  
poland  
portugal  
romania  
russia  
singapore  
spain  
sweden  
switzerland  
the netherlands  
uk  
ukraine  
usa



● markets surveyed

[click here](#) for detailed research methodology

## 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

## country

- 3,804 respondents

## fieldwork

- online interviews
- january - february 2021

## length of interview

- 16 minutes



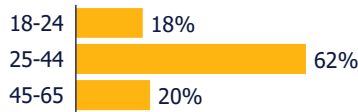
# sample composition in the united states

## socio-demographics, employment status, region.

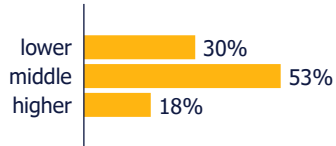
### gender



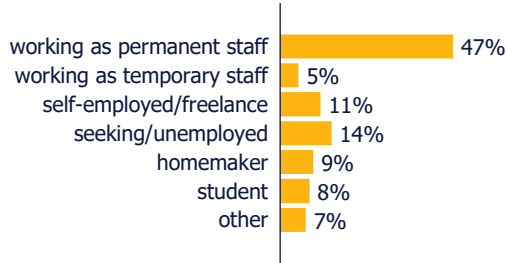
### age



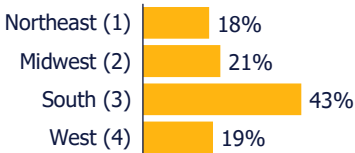
### education



### employment status



### region



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

total sample: 3,804  
fieldwork: january - february 2021

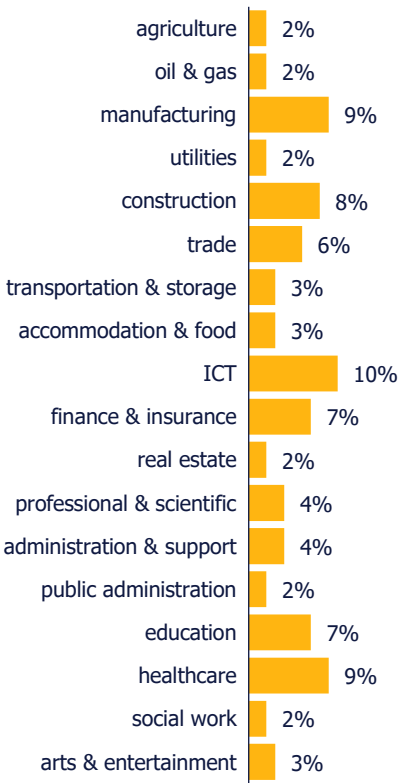




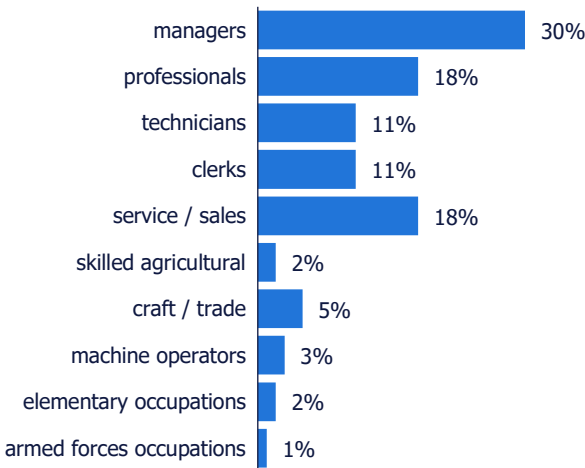
# sample composition in the united states

## sector, function.

sector



function



base: currently employed (n=2,394)



usa

employer  
attractiveness.



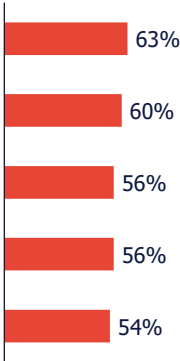
# what potential employees want

## the 5 most important drivers when choosing an employer.

top 5 most important drivers



north america  
2021

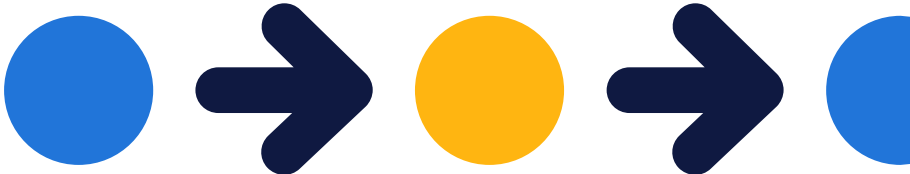


usa  
top 5 drivers 2020

- 01 attractive salary & benefits
- 02 work-life balance
- 03 job security
- 04 pleasant work atmosphere
- 05 location

usa  
top 5 drivers 2019

- 01 attractive salary & benefits
- 02 work-life balance
- 03 job security
- 04 pleasant work atmosphere
- 05 good training



\*when comparing 2021 with previous years, please note that this question has been altered in that respondents are now free to choose as many drivers as they considered important from a list of 16 drivers whilst in previous years they were forced to pick exactly 5 out of these 16.

# what potential employees want when choosing an employer.

---

## most important driver

### salary & benefits and work-life balance

Salary & benefits and work-life balance are the most important drivers among Americans. Both these drivers are more prominent among women and the middle-educated. Furthermore, these are the employees who are more demanding overall as they consider more than 8 drivers essential compared to about 7 for the average American. A COVID-19 safe work environment is rated 7th in importance and it is also more important for women and the middle-educated. Lower ratings are given for uses latest technologies with men considering this aspect more important (35%) compared to women (27%).

---

[click here](#) for a breakdown of the EVP importance results by socio-demographic profile.

---

## employers' proposition

### good reputation, COVID-19 safe and financial health

American employees rate their own employers highest on very good reputation, followed by providing a COVID-safe work environment together with financial health. The lowest rating given by employees is for the possibility to work remotely, especially by women, employees aged between 18 and 24 and the lower-educated. Compared to other regions, those living in the South of the US are most satisfied with most drivers, such as very good reputation, attractive salary & benefits, and pleasant work atmosphere.

---

[click here](#) for a deep dive into the most attractive sectors and employers in 2021.

---

## recommended employer focus

### salary & benefits and work-life balance

There is a gap in what employees in the US seek and what their employers are perceived to offer. Salary & benefits and a good work-life balance are both very important for the American workforce, however, they are not one of the top attributes identified in the average American employer. Employers in the US may want to pay attention and deliver strategies to bridge this gap between what employers look for but are not sufficiently offered.

# what do potential employees want

## job collars in focus.

### white-collar

52%

of white-collar employees consider good training an important driver and this is lower when compared to blue-collar workers (56%).

### blue-collar

62%

of blue-collar workers consider attractive salary & benefits the most important driver in an ideal employer and this is slightly higher when compared to white-collar professionals (61%).

### most important attributes



# job-switching behavior



in focus.

# switching behavior finding another employer.

1 in 6 Americans changed employer in the second half of 2020

16% of American employees changed their employer in the last half of 2020. This is more so among men (19%), those aged 18 to 24 (25%) and among the higher-educated (24%).

Furthermore, 25% intend to switch employers in the first half of 2021 and this includes relatively more men (27%). The younger intend more often to switch employer: 34% among the 18-to-24-year-olds and 28% among the 25-to-34-year-olds.

google – top channel to find the next employer

The most used channel by switchers is Google with almost one third of American employees making use of it. Job portals (28%) and social media (27%) are also very often used; job portals are especially popular among women for finding work (36%).

Middle-educated employees make more use of personal connections/referrals (29%) than lower- and higher-educated employees (15% and 14%, respectively).



# most important attributes switchers vs. stayers.

## switchers

2021

16%

changed employer in the  
past 6 months.

2021

21%

of those affected by  
COVID changed employer  
in the past 6 months.

## stayers

2021

84%

stayed with their employer  
in the past 6 months.

## most important attributes



\* past 6 months = last half of 2020. REBR2021 covers a period of 6 months (as opposed to 12 months in the past) in order to better capture the impact of COVID-19.



# switching behavior job collars in focus.

## white-collar intenders

22%

of white-collar employees intend to change to another employer in the first half of 2021. This is in line with the average American employee (25%) who intends to switch employers.

## blue-collar switchers

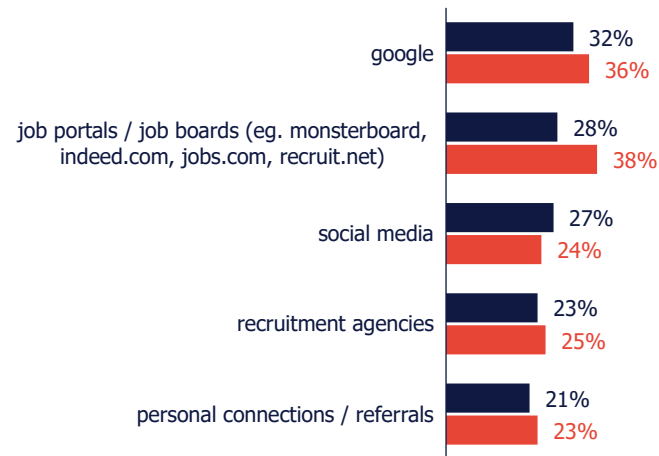
18%

of blue-collar workers switched employers in the last half of 2020. This is in line with the average American employee (16%) and white-collar employees (22%).

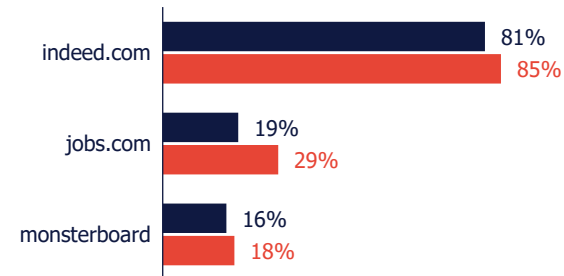


# how do employees in the united states find new job opportunities.

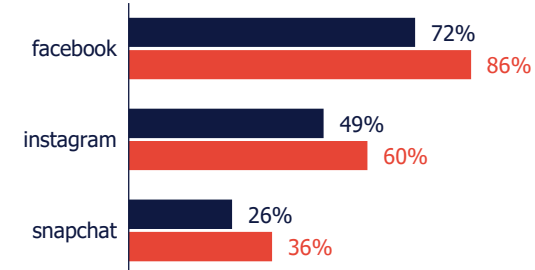
## top 5 channels used to find new job opportunities



## top 3 job portals



## top 3 social media channels



● 2021

● 2020

# COVID-19

in focus.



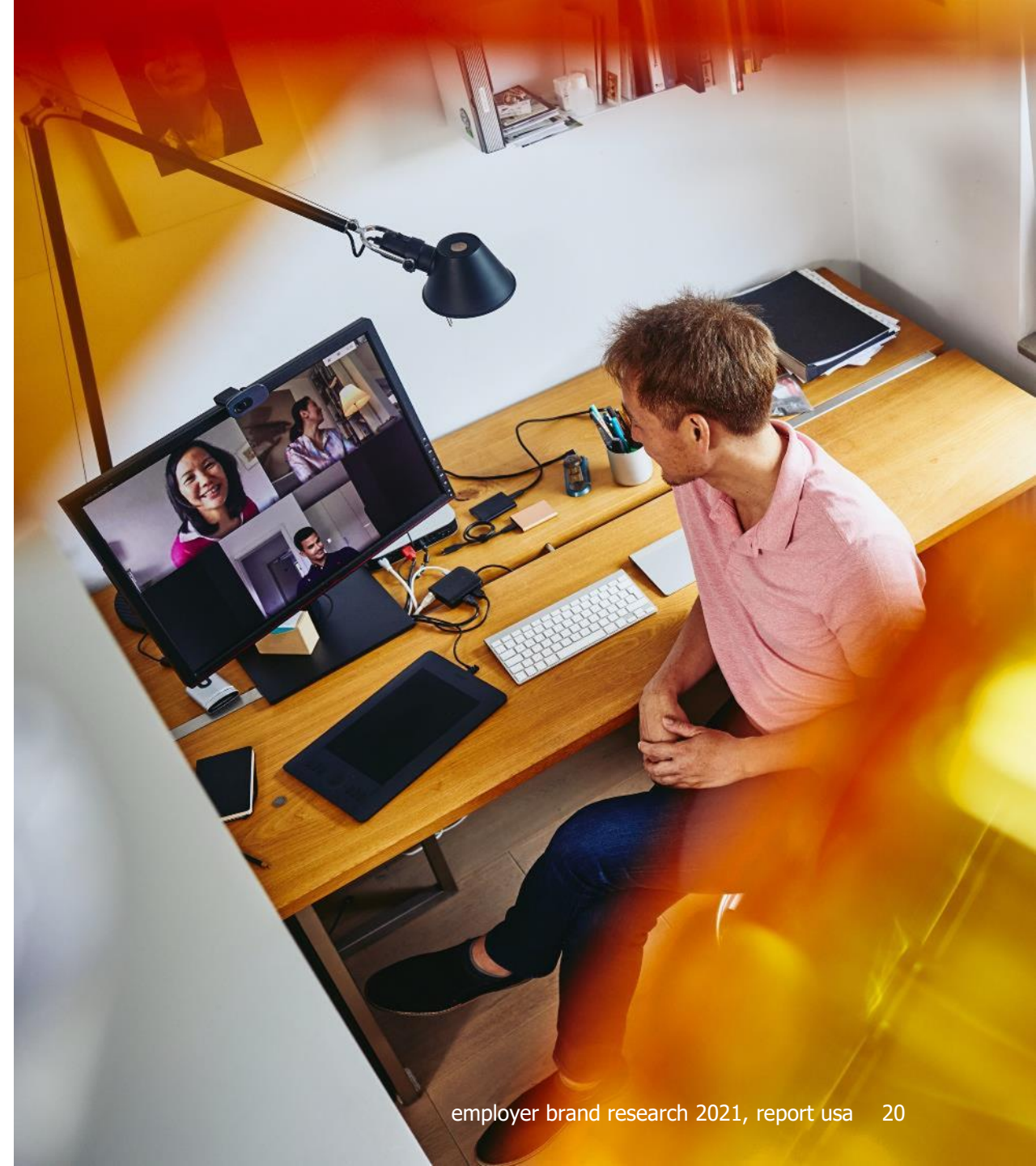
# COVID-19 and its impact on the labor market.

## possibility of working remotely relatively important

Even though it is not one of the most important drivers in the country, 43% of employees in the US are attracted by the possibility to work remotely. Women and the middle-educated are more inclined to rank this driver as important (49% and 46%, respectively). There is no difference between those who work part-time or full-time when it comes to the importance of this aspect.

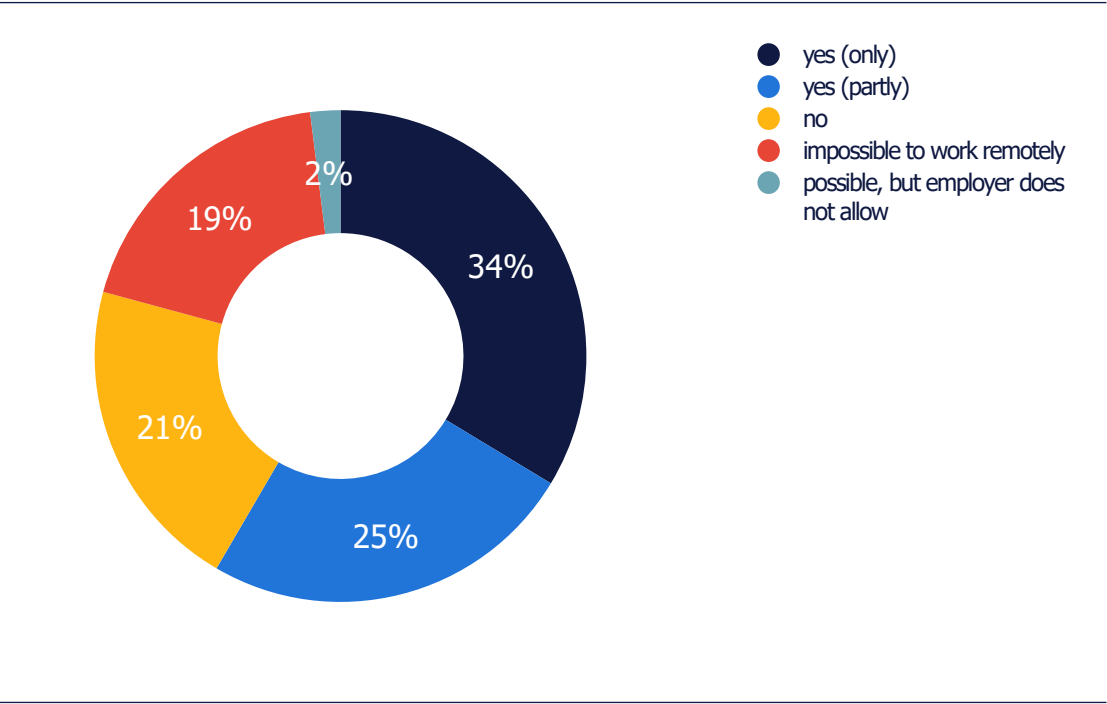
## more than half of employees started to work (more) remotely during the COVID-19 pandemic

Out of the 59% employees who started working more remotely, 67% were involved in the decision to work remotely, whereas for 31% of employees this was imposed on them by their employer and/or authorities.



# remote working due to COVID-19.

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

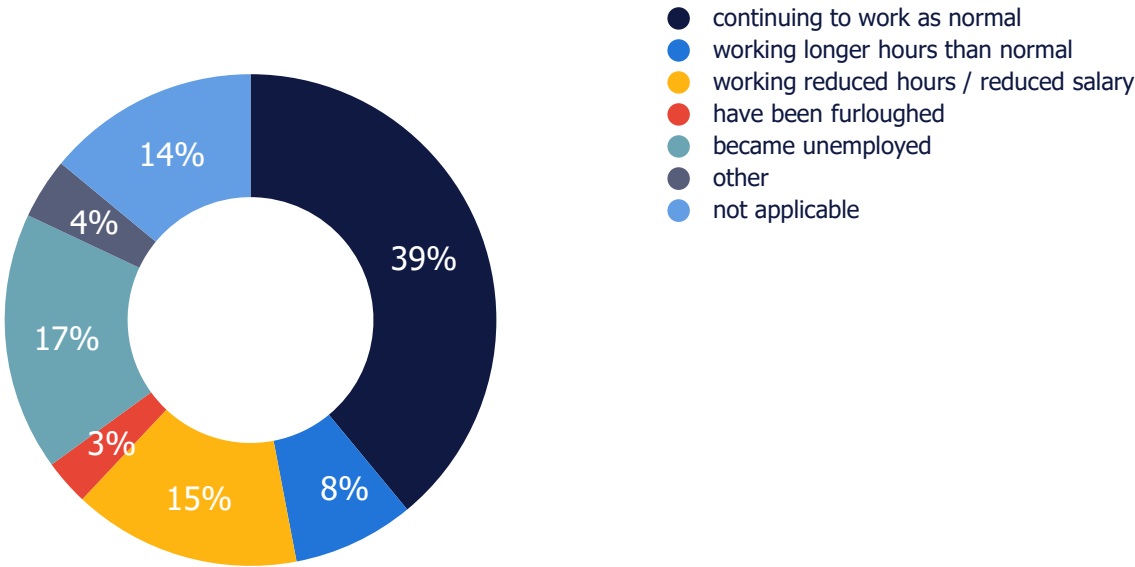


<div>usa</div> <div>42%</div> <div>of the employees who said they worked remotely, do so out of their own decision.</div>	<div>Having an influence on the decision to work more remotely is higher among men (49% to decide for themselves). It is primarily the higher-educated who started working more remotely.</div>	<div>Only 2% of employees who can work from home are not allowed to do so by their employer. Next to that, for 19% of employees, jobs are bound to the premises which makes working from home or elsewhere impossible. This is especially true for 28% of the lower-educated employees.</div>
<div>north america</div> <div>41%</div> <div>of the employees who said they worked remotely, do so out of their own decision.</div>	<div>When looking across North America, we see that men were much more likely than women (48% vs. 31%) to work from home out of their own decision.</div>	<div>A very small proportion of North Americans who could work from home were not allowed to do so by their employer (2%). For 19% of North Americans, working from home is impossible as their jobs are bound to the premises with this being most often the case for the lower-educated (28%).</div>



# employment situation changes due to COVID-19.

how COVID-19 changed one's employment situation



one in two employees saw their employment situation change

47% of employees were either furloughed, became unemployed, worked more or fewer hours than usual or for other reasons saw their employment situation change due to COVID-19.

A higher proportion of those who became unemployed was among lower-educated employees (26%).

Of those who started working more hours, 11% are represented by men and 16% by higher-educated employees.

More men (43%) and higher-educated (54%) employees continued to work as normal.

north america

47%

have seen their employment situation change due to COVID-19.

# job loss fear in 2021 intention to switch.

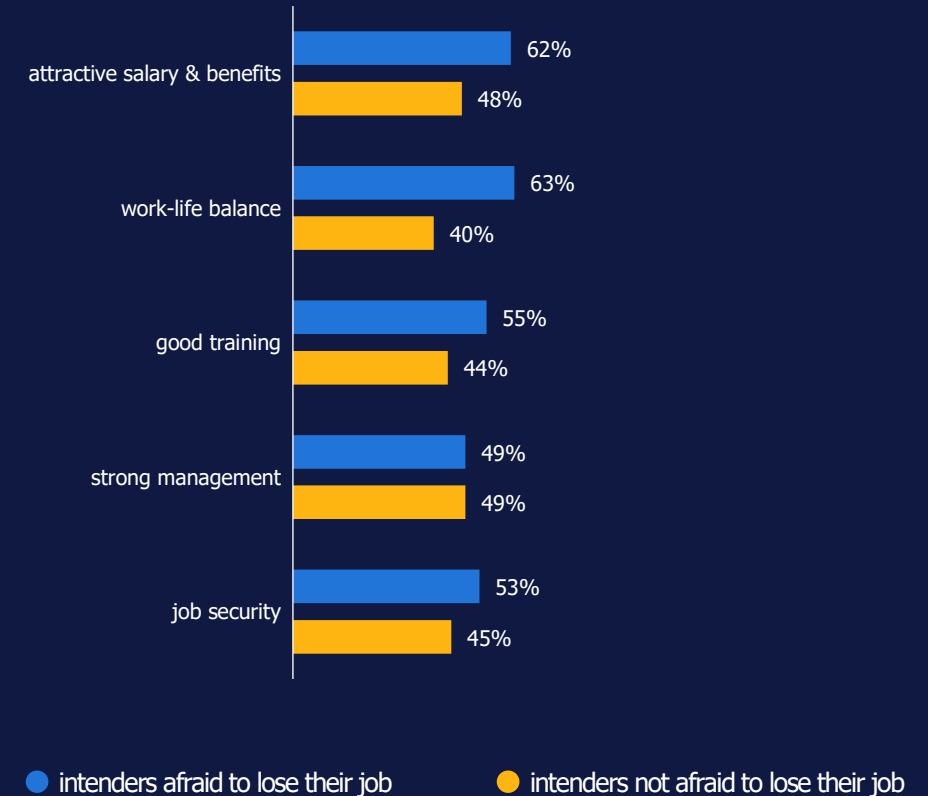
32%

of the employees who are afraid of losing their job, plan to change their job in the next 6 months.

15%

of the employees who are not afraid of losing their job, plan to change their job in the next 6 months.

## most important attributes



\* next 6 months = first half of 2021. REBR2021 covers a period of 6 months (as opposed to 12 months in the past) in order to better capture the impact of COVID-19.

# intention to switch amongst those affected by COVID-19.

---

intenders

2021

25%

plan to change employer in the  
next 6 months.

---

intenders

2021

36%

of those affected by COVID-19 plan to  
change their employer in the next 6 months.

---



\* next 6 months = first half of 2021. REBR2021 covers a period of 6 months (as opposed to 12 months in the past) in order to better capture the impact of COVID-19.

If one's employment situation has changed due to COVID-19, the intention to change to a new employer is considerably higher (36%) than those who just intend to change employers (25%).

The way American employers have supported their employees and handled the pandemic had a very positive impact on loyalty among employees. No less than 73% of employees now feel that they are more loyal as opposed to a mere 6% who feel less loyal to their employer. The higher-educated are more likely to be more loyal (84%) and those aged 18 to 24 are more likely to be less loyal (14%).

Whether one was obliged to work from home or if that was a decision one could make for themselves does not have a major impact on loyalty.



# job loss fear in 2021 due to COVID-19.

## considerable fear of losing job

The pandemic has caused varied concerns among employees over the security of their jobs. Employees were asked about how worried they are about losing their job in 2021 due to COVID-19.

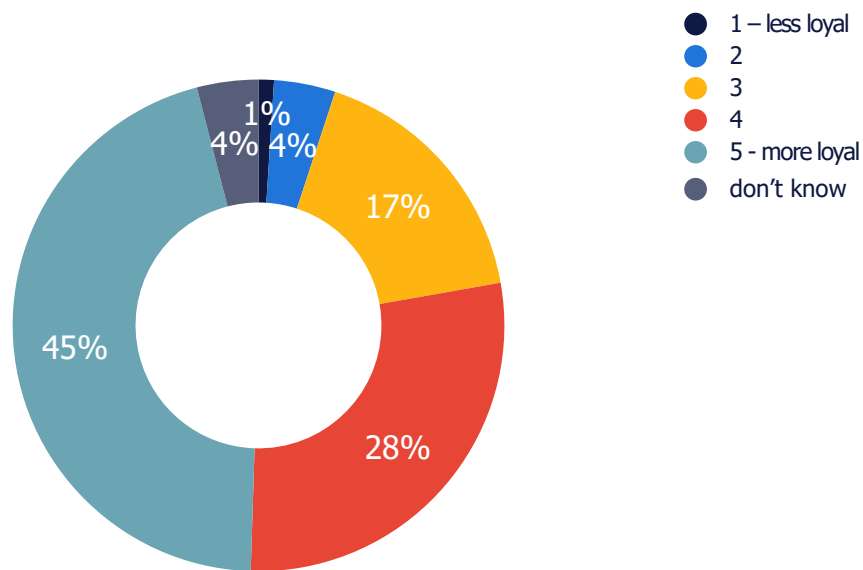
Although there are more people not afraid of losing their job (48%), a substantial number of Americans do fear that this will happen in 2021 (28%). Those aged between 25 and 34 are more worried than the average American (34%).

42% of employees who are afraid of losing their job plan to change their employer in the first half of 2021, whereas only 34% of employees who are not worried about becoming unemployed intend to switch jobs.



# loyalty towards employers during the pandemic.

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



## works only remotely

**72%** of the employees who only work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

## works partly remotely

**75%** of the employees who work partly from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

## obliged to work remotely

**71%** of the employees who were obliged by their employer / authorities to work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

## own decision to work remotely

**78%** of the employees who decided on their own to work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

# 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

- ipient re laceatu riateni temquis coraectem volorro totasi ipsam dis sum quissinvenis enisti ut faccae
- obita qui qui as modisque pos est re, officataque dem ut atur sum nis assi nimo vollab ilit ratus, vid ut volo rem la idebis etur ressi deri dolo bearum remporenis
- alita ex ellupta tecusam que non repuda nimpe solum am dolecti re il ipsam fugiam volorum quam



# let's talk.

our research has many insightful, but complex insights so we'd love the opportunity to walk you through this document, share our thoughts and answer any questions you might have.

**randstad usa**

Linda Christensen

[linda.christensen@randstadusa.com](mailto:linda.christensen@randstadusa.com)



# appendix 1

deep dive  
EVP drivers.

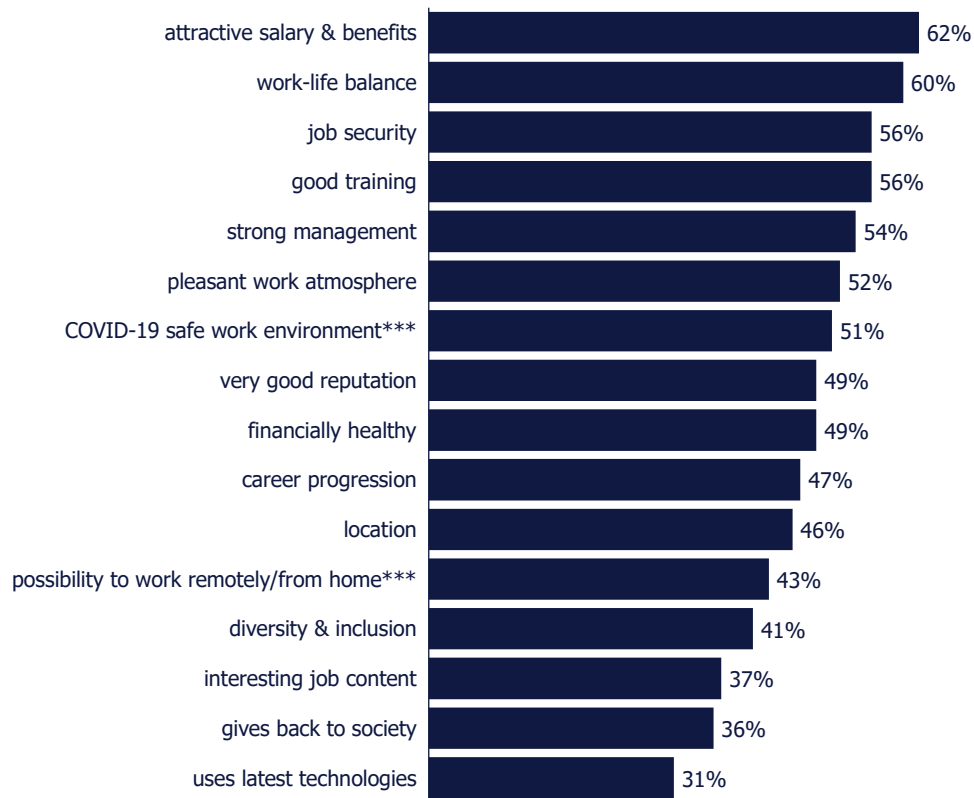




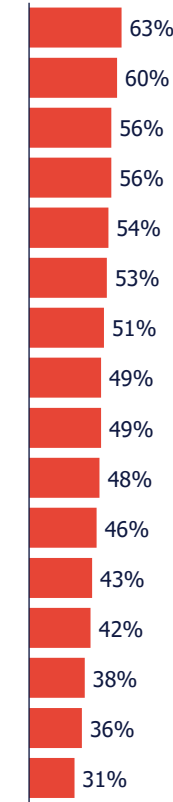
# what potential employees want

## the most important criteria when choosing an employer.

### important criteria



### north america 2021



### usa 2020

- 01 attractive salary & benefits
- 02 work-life balance
- 03 job security
- 04 pleasant work atmosphere
- 05 flexible arrangements\*\*\*
- 06 location
- 07 good training
- 08 strong management
- 09 financially healthy
- 10 career progression
- 11 very good reputation
- 12 diversity & inclusion
- 13 interesting job content
- 14 quality products\*\*\*
- 15 gives back to society
- 16 uses latest technologies

### usa 2019

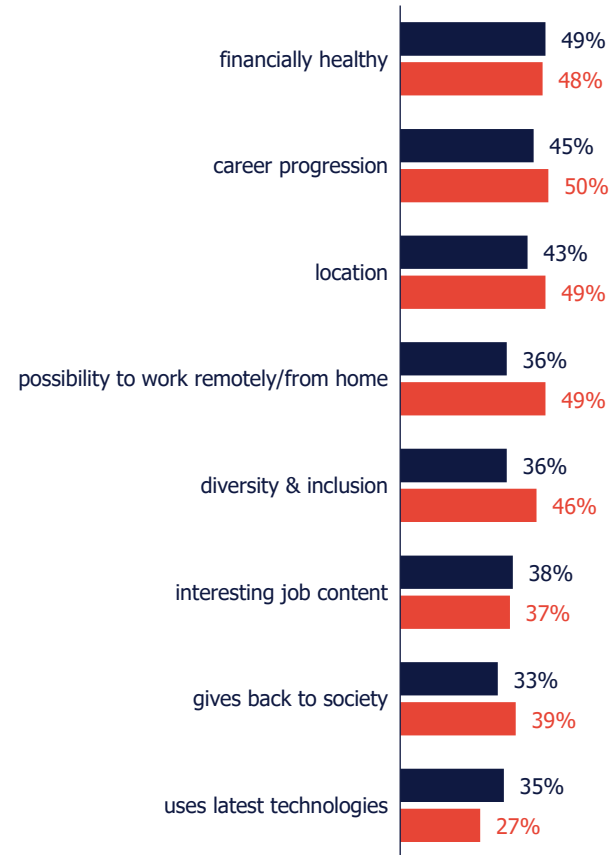
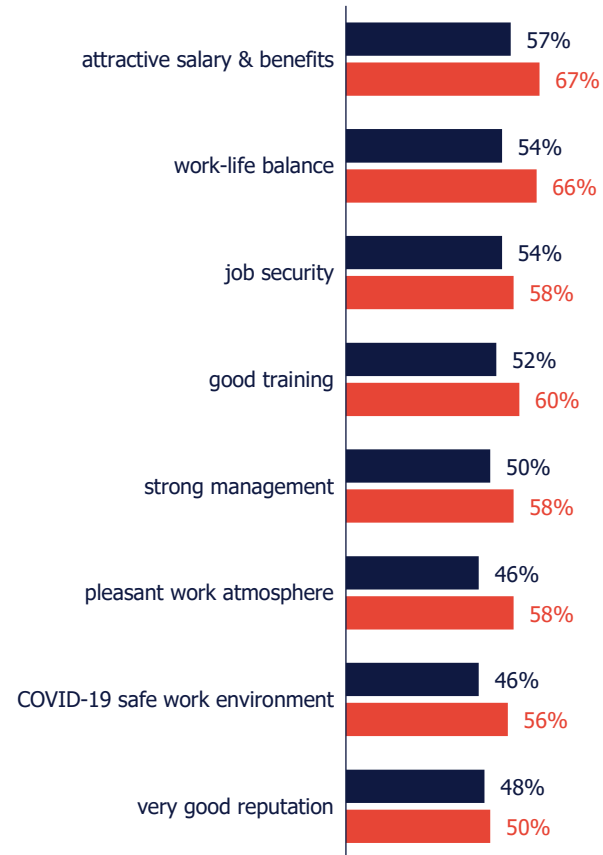
- 01 attractive salary & benefits
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- 15 gives back to society
- 16 uses latest technologies

\* when comparing 2021 with previous years, please note that this question has been altered in that respondents are now free to choose as many drivers as they considered important from a list of 16 drivers whilst in previous years they were forced to pick exactly 5 out of these 16.

\*\*\*only researched in 2021/ interrupted in 2021

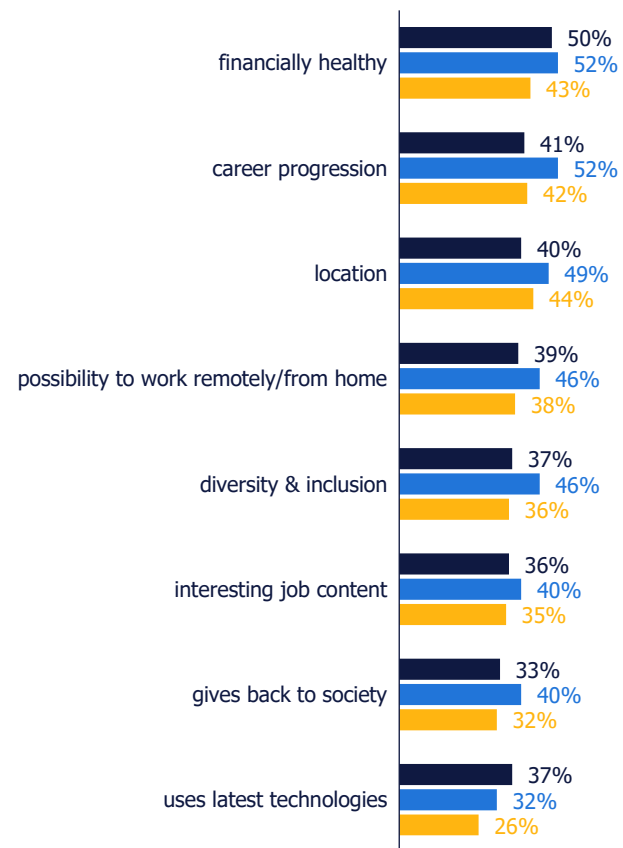


# EVP driver importance by gender.



● male  
● female

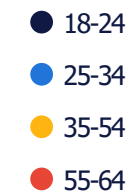
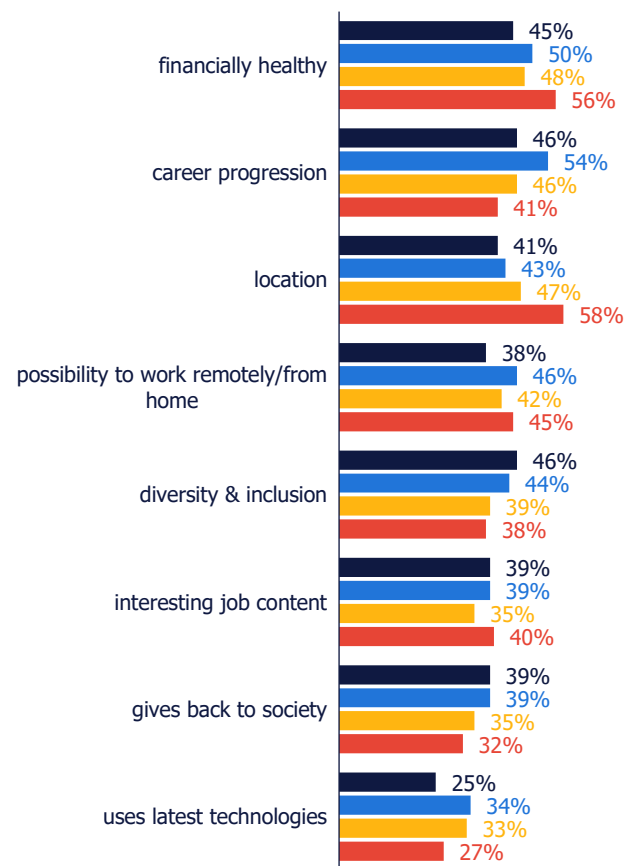
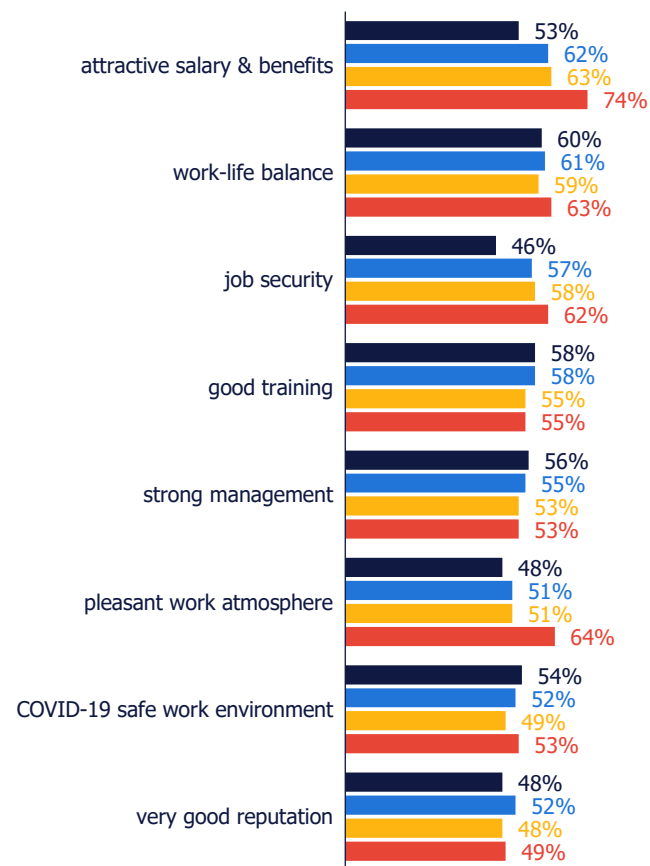
# EVP driver importance by education.



● higher  
● middle  
● lower



# EVP driver importance by age.

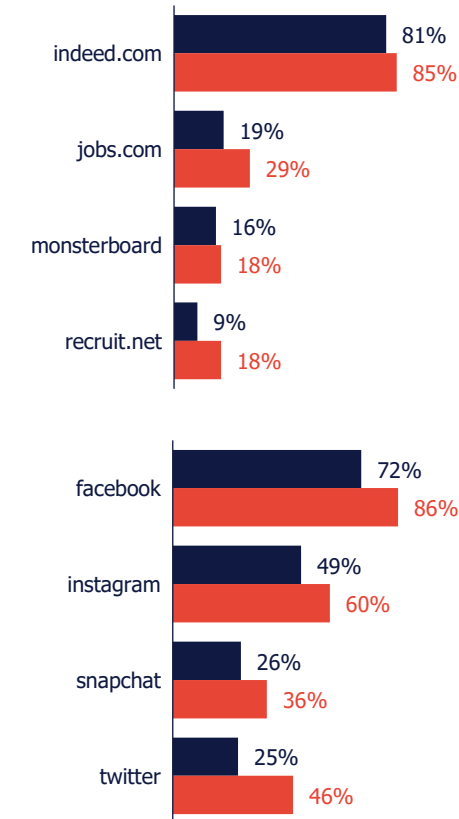


# how do employees in the united states find new job opportunities.

channels used to find new job opportunities



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



● 2021

● 2020



# appendix 2



deep dive  
employers.

# perception of employer offer in the united states.

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	general perception of employers in the usa	profile of ideal employer
01 very good reputation	01 financially healthy	01 attractive salary & benefits
02 COVID-19 safe work environment	02 COVID-19 safe work environment	02 work-life balance
03 financially healthy	03 very good reputation	03 job security
04 job security	04 job security	04 pleasant work atmosphere
05 work-life balance	05 career progression	05 COVID-19 safe work environment
06 pleasant work atmosphere	06 attractive salary & benefits	06 very good reputation
07 attractive salary & benefits	07 pleasant work atmosphere	07 financially healthy
08 gives back to society	08 work-life balance	08 career progression
09 career progression	09 gives back to society	09 possibility to work remotely/from home
10 possibility to work remotely/from home	10 possibility to work remotely/from home	10 gives back to society

# perception of employer offer in the usa and the region.

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



## employers in the usa are perceived to offer

- 01 financially healthy
- 02 COVID-19 safe work environment
- 03 very good reputation
- 04 job security
- 05 career progression
- 06 attractive salary & benefits
- 07 pleasant work atmosphere
- 08 work-life balance
- 09 gives back to society
- 10 possibility to work remotely/from home

## employers in north america are perceived to offer

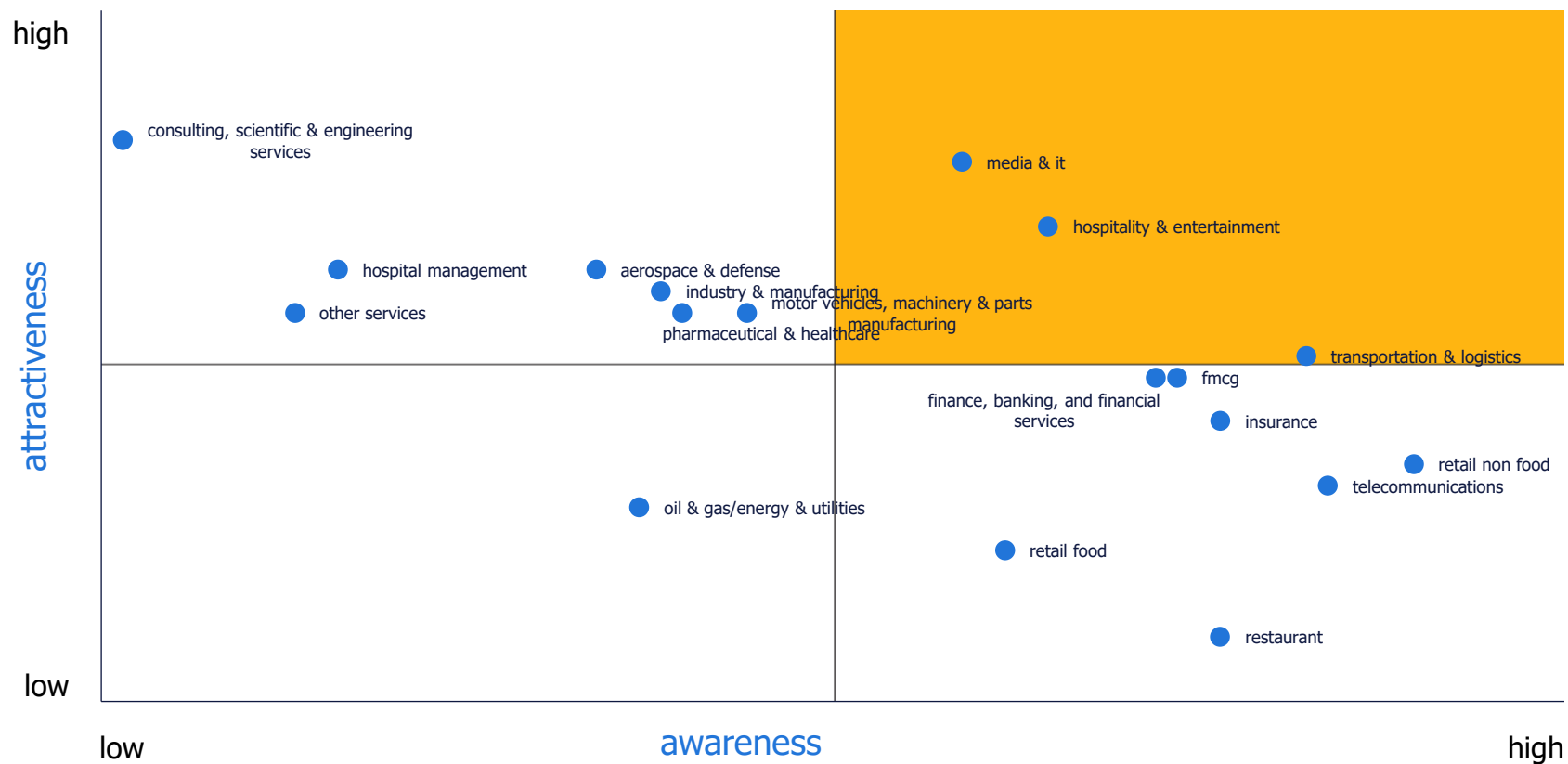
- 01 financially healthy
- 02 COVID-19 safe work environment
- 03 very good reputation
- 04 career progression
- 05 job security
- 06 attractive salary & benefits
- 07 pleasant work atmosphere
- 08 work-life balance
- 09 gives back to society
- 10 possibility to work remotely/from home

sector

insights.



# top performing sectors in the usa by awareness and attractiveness.



## high awareness

having a high awareness means that employers in the sector are widely known.

## high attractiveness

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



# usa's best performing companies by sector.

1/2

sector	top 3 companies		
	1	2	3
01 consulting, scientific & engineering services	Thermo Fisher Scientific	AECOM	
02 media & it	Apple	The Walt Disney Company	Western Digital
03 hospitality & entertainment	MGM Resorts International	Caesars Entertainment	Hilton Worldwide
04 aerospace & defense	Northrop Grumman Corporation	Lockheed Martin Corporation	The Boeing Company
05 hospital management	Tenet Healthcare Corporation	Community Health Systems, Inc.	HCA Holdings, Inc.
06 industry & manufacturing	General Electric Company	3M Company	International Paper Company
07 pharmaceutical & healthcare	Johnson & Johnson	Abbott Laboratories	Merck KGaA
08 motor vehicles, machinery & parts manufacturing	Genuine Parts Company	General Motors Company	Lear
09 other services	ABM Industries Incorporated	Marsh & McLennan	CBRE Group
10 transportation & logistics	UPS	Fedex Corporation	Southwest Airlines





# usa's best performing companies by sector.

2/2

	top 3 companies		
sector	1	2	3
11 finance, banking, and financial services	Truist Financial	PNC Bank	American Express
12 fmcg	The Coca-Cola Company	Mondelez International	P&G - Procter & Gamble
13 insurance	Prudential Financial	Cigna Corporation	UnitedHealth
14 retail non food	Amazon	Nike	Target Corporation
15 telecommunications	AT&T Inc.	Verizon	Comcast Corporation
16 oil & gas/energy & utilities	Baker Hughes	Halliburton	Marathon Petroleum
17 retail food	Costco Wholesale Corporation	Sysco	Publix Super Markets, Inc.
18 restaurant	Brinker International, Inc.	Starbucks	Darden Restaurants, Inc. (Olive Garden, Capital Grille, LongHorn)



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

1/2

sector	top 3 EVP drivers		
	1	2	3
01 consulting, scientific & engineering services	very good reputation	attractive salary & benefits	job security
02 media & it	financially healthy	COVID-19 safe work environment	attractive salary & benefits
03 hospitality & entertainment	very good reputation	financially healthy	COVID-19 safe work environment
04 aerospace & defense	financially healthy	attractive salary & benefits	COVID-19 safe work environment
05 hospital management	COVID-19 safe work environment	very good reputation	financially healthy
06 industry & manufacturing	financially healthy	very good reputation	COVID-19 safe work environment
07 pharmaceutical & healthcare	financially healthy	COVID-19 safe work environment	job security
08 motor vehicles, machinery & parts manufacturing	financially healthy	very good reputation	COVID-19 safe work environment
09 other services	COVID-19 safe work environment	financially healthy	career progression
10 transportation & logistics	financially healthy	career progression	attractive salary & benefits

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

2/2

	top 3 EVP drivers		
sector	1	2	3
11 finance, banking, and financial services	financially healthy	COVID-19 safe work environment	job security
12 fmcg	financially healthy	job security	COVID-19 safe work environment
13 insurance	financially healthy	COVID-19 safe work environment	job security
14 retail non food	financially healthy	very good reputation	COVID-19 safe work environment
15 telecommunications	financially healthy	COVID-19 safe work environment	job security
16 oil & gas/energy & utilities	financially healthy	attractive salary & benefits	COVID-19 safe work environment
17 retail food	financially healthy	very good reputation	COVID-19 safe work environment
18 restaurant	financially healthy	very good reputation	COVID-19 safe work environment



top



employers.

# top employers to work for in the usa.

## top 10 employers 2021

---

- 01 Apple
  - 02 The Walt Disney Company; Western Digital
  - 03 Amazon
  - 04 Cognizant Technology Solutions
  - 05 MGM Resorts International
  - 06 Nike
  - 07 Northrop Grumman Corporation
  - 08 Tenet Healthcare Corporation
  - 09 Thermo Fisher Scientific
  - 10 Community Health Systems, Inc.
- 

## top 10 employers 2020

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- 01 Thermo Fisher Scientific
  - 02 Jacobs Engineering Group Inc.
  - 03 Alphabet
  - 04 Amazon
  - 05 Genuine Parts Company
  - 06 Schlumberger
  - 07 Community Health Systems, Inc.
  - 08 Tenet Healthcare Corporation
  - 09 Apple
  - 10 United Technologies Corporation
-

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

top 5 companies	1	2	3
1 Apple	financially healthy	attractive salary & benefits	very good reputation
2 The Walt Disney Company	financially healthy	very good reputation	career progression
3 Amazon	financially healthy	job security	career progression
4 Cognizant Technology Solutions	pleasant work atmosphere	COVID-19 safe work environment	work-life balance
5 MGM Resorts International	COVID-19 safe work environment	career progression	very good reputation

# usa's top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	Lockheed Martin Corporation	Intel	Alphabet
work-life balance	AECOM	Cognizant Technology Solutions	CBRE Group
job security	Lockheed Martin Corporation	Intel	The Coca-Cola Company
pleasant work atmosphere	Cognizant Technology Solutions	AECOM	Western Digital
COVID-19 safe work environment	Western Digital	Tenet Healthcare Corporation	Pfizer Inc.
very good reputation	Costco Wholesale Corporation	3M Company	Intel
financially healthy	Amazon	Apple	The Coca-Cola Company
career progression	Marsh & McLennan	General Electric Company	Community Health Systems, Inc.
possibility to work remotely/from home	Cognizant Technology Solutions	Intel	Apple
gives back to society	CBRE Group	Community Health Systems, Inc.	The Walt Disney Company

# appendix 3



## methodology.



# 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.

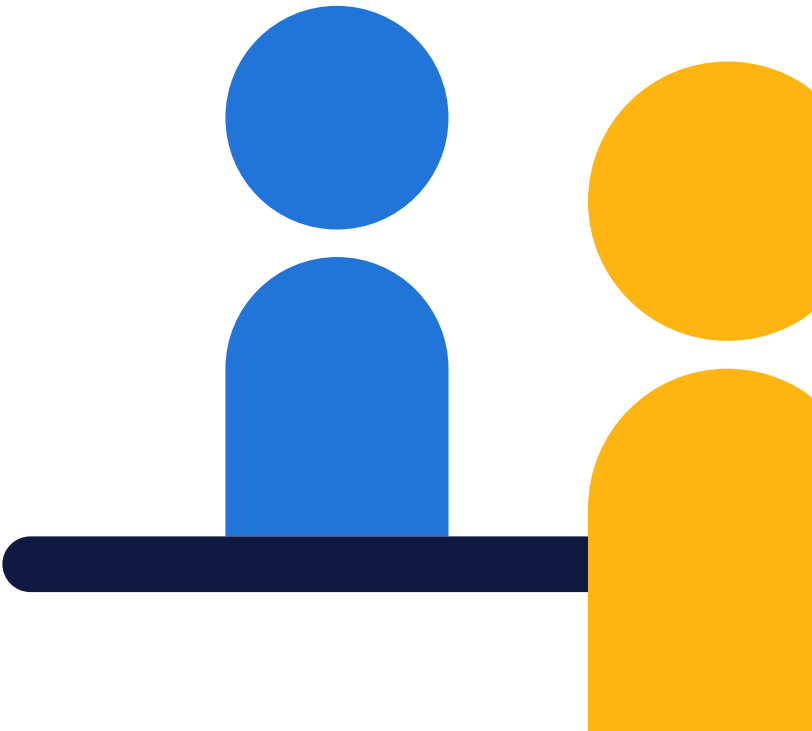
## drivers

each company is evaluated on:

- 01 financially healthy
- 02 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.



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human forward.

