

employer
brand research
2020



canada.

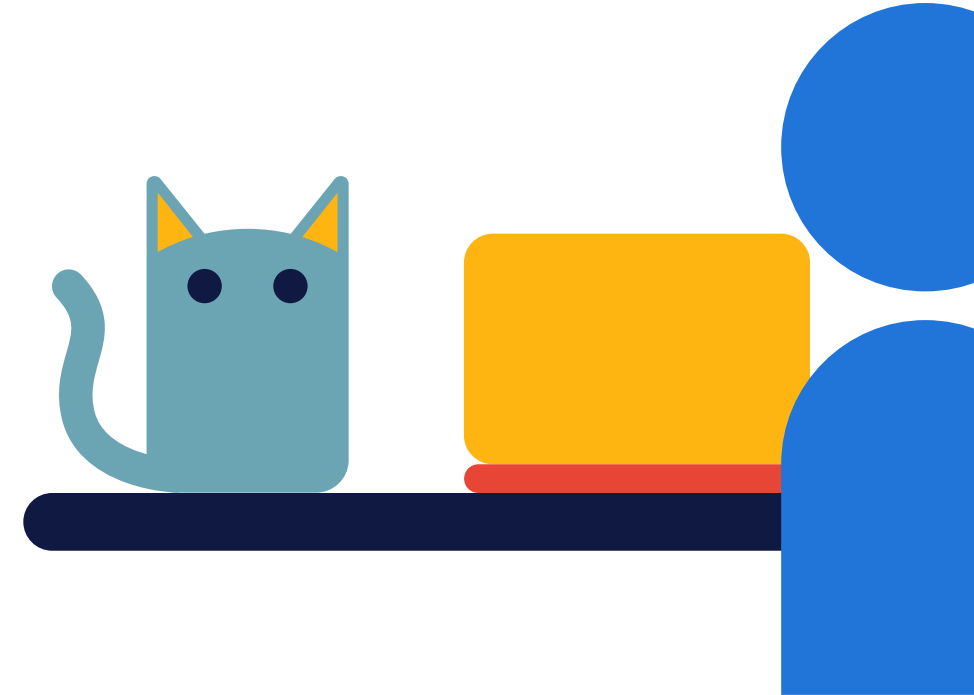
 randstad

human forward.

foreword

As we publish this year's Randstad Employer Brand Research, we at Randstad are fully aware of the new situation we are in as a result of COVID-19. The timing of the questionnaire and its results were analyzed before the discovery of the virus. Since then, COVID-19 has paralyzed local economies and labor markets and as a result several companies find themselves facing unprecedented challenges.

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



content.

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



introduction.



why employer branding matters.



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

50%

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

96%

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

80%

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

19%

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

52%

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

#1

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

1-2x

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

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.⁹

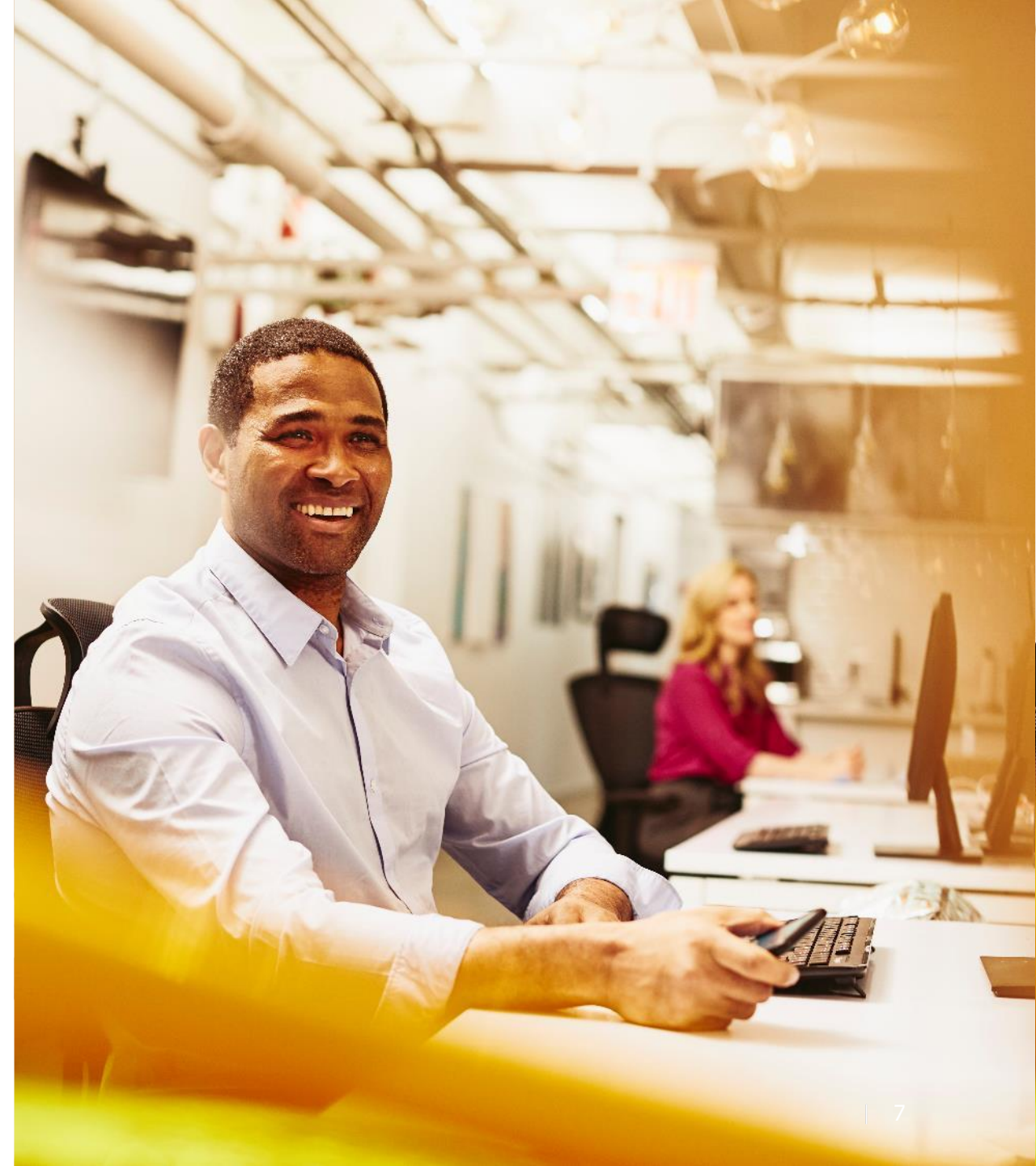


the employer brand roadmap.



what is the randstad employer brand research?

- a representative employer brand research based on perceptions of the general audience. Optimizing over 20 years of successful employer branding insights.
- an independent survey with nearly 185,000 respondents in 33 markets worldwide.
- 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.



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

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



● markets surveyed

worldwide

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

sample

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

country

- 3,527 respondents

fieldwork

- online interviews
- between 18 december 2019 and 23 january 2020

length of interview

- 16 minutes



employer brand research set up.

30 companies per respondent

'do you know this company?': determines awareness.

for each company known

'would you like to work for this company?': determines attractiveness.

each company known

rating on a set of drivers: determines reason for attractiveness.

smart sampling

Each respondent is shown 30 companies. Each company is evaluated only by respondents who are aware of that particular brand.

In order to make sure that the less well known brands are assessed by a sufficient number of respondents, we make use of a smart sampling method.

This method ensures that the lesser known companies are shown to more respondents in order to realize a sufficient robust sample. That way the Randstad Employer Brand Research assures dependable insights for both well known and lesser known employer brands.

drivers

each company is evaluated on:

- 01 financially healthy
 - 02 uses latest technology
 - 03 very good reputation
 - 04 job security
 - 05 career progression
 - 06 gives back to society
 - 07 interesting job content
 - 08 pleasant work atmosphere
 - 09 work-life balance
 - 10 attractive salary & benefits
-

KANTAR

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



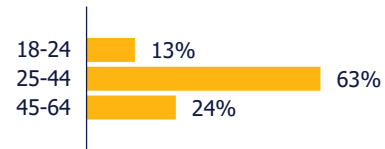
sample composition in canada

socio-demographics, employment status, region.

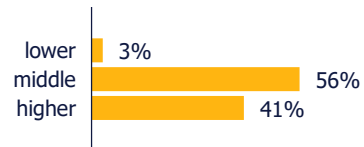
gender



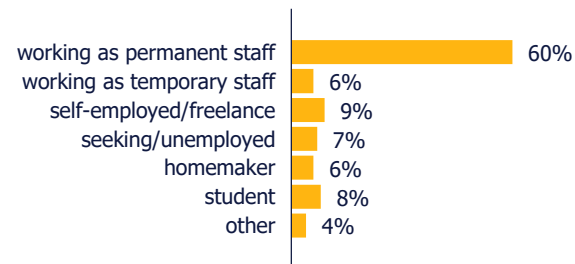
age



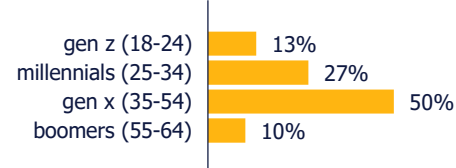
education



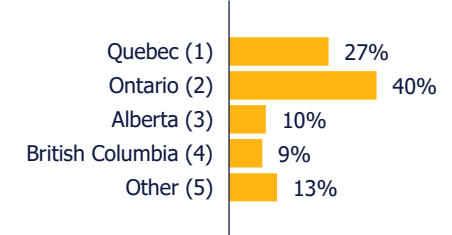
employment status



generation



region



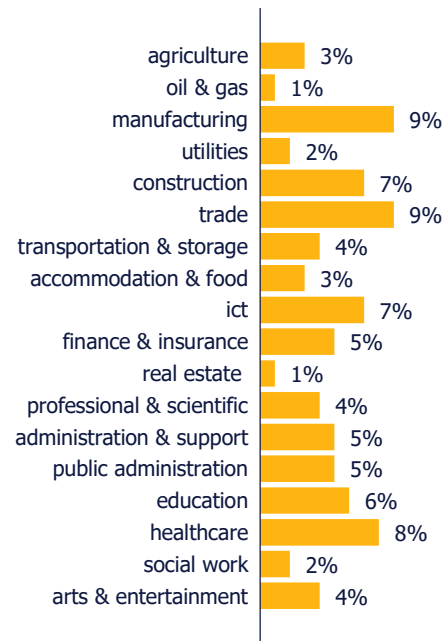
1. Nova Scotia, New Brunswick, Quebec, Ontario, PEI, Newfoundland and Labrador
2. Manitoba, Saskatchewan, Alberta, British Columbia, Northwest Territories, Yukon, Nunavut
3. Nova Scotia, New Brunswick, Quebec, Ontario, Manitoba, Saskatchewan, Alberta, British Columbia, PEI, Newfoundland and Labrador, Northwest Territories, Yukon, Nunavut

total sample: 3,527
 fieldwork: between 18 december 2019 and 23 january 2020

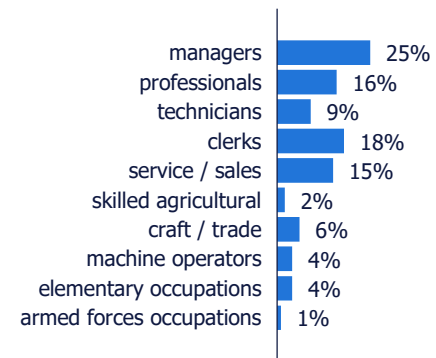


sample composition in canada.

sector



function

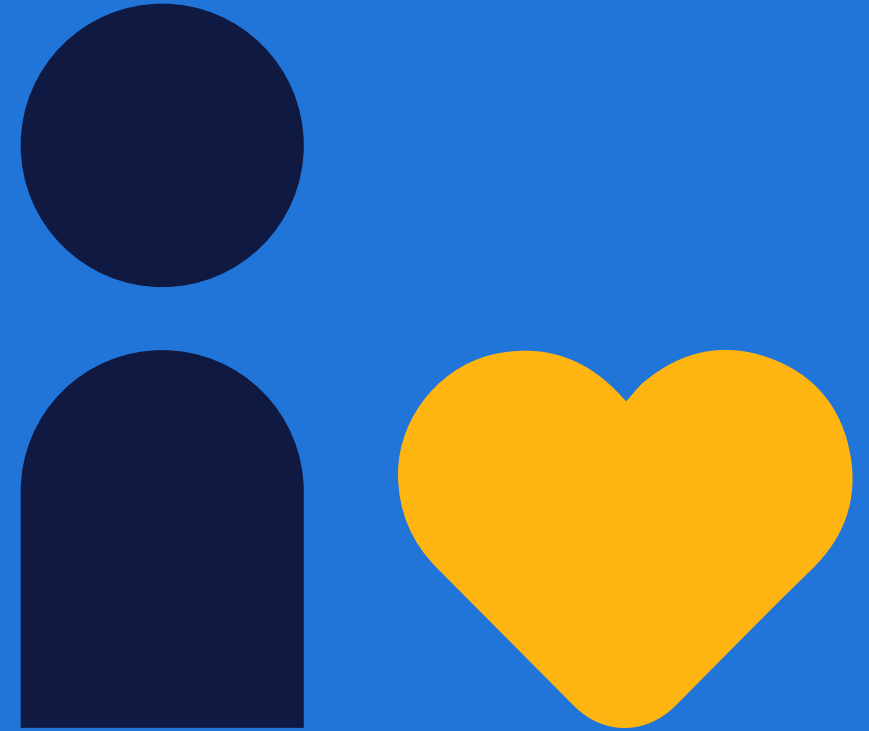


base: currently employed (n=2,624)



canada

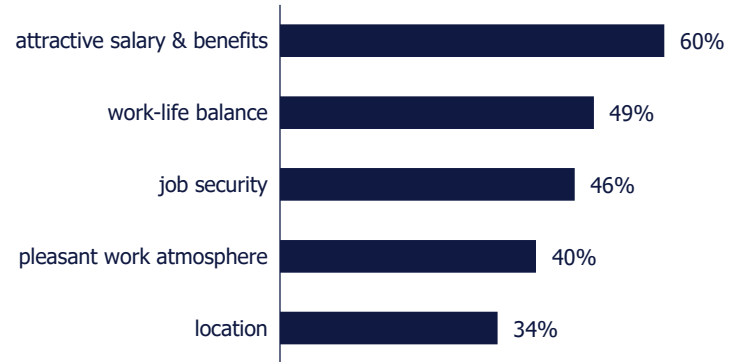
EVP drivers.



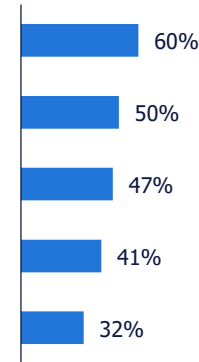
what potential employees want when choosing an employer.

most important criteria

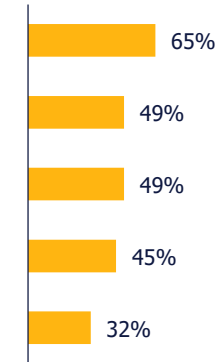
canada 2020



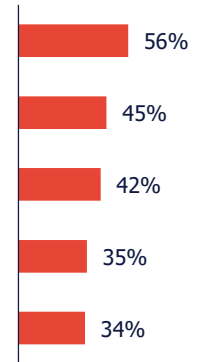
canada 2019



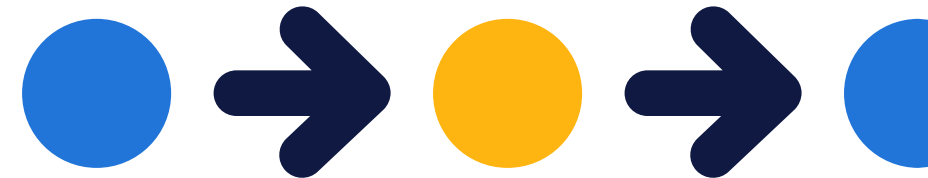
canada 2018



north america 2020



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



perception of employer offer in canada.

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



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

Employers in a market may not always be perceived to be offering what (potential) employees are looking for. Below you see the 3 main attributes employees look for but which they believe employers do not sufficiently offer.

gap top 3

attractive salary & benefits

work-life balance

job security



what do potential employees want by generational profile.

gen z (18-24)

34%

of the gen z's are looking for an employer with strong management. This is higher when compared to millennials (27%), gen x (25%) and boomers (21%).

gen x (35-54)

50%

of the gen x's find job security a very important pull factor towards an employer. Among gen z and millennials, this factor is deemed less important (32% and 43%, respectively).

millennials (25-34)

37%

of the millennials seek career progression opportunities. Gen x and boomers are less interested in this offering from their employer (31% and 23%, respectively).

boomers (55-64)

70%

of the boomers are attracted to companies that offer attractive salary & benefits. This is less so among gen z (51%), millennials (56%) and gen x (63%).



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



important attributes by type of contract.

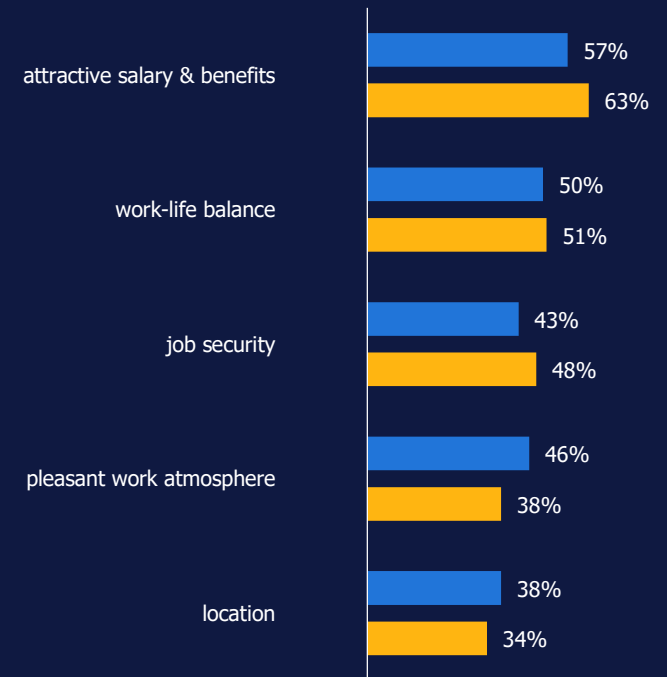


15%

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



most important attributes



● part-time workers

● full-time workers

switchers
and stayers

in focus.



changing employer canada vs north america.

switchers: changed employer in the past year.



stayers: stayed with their employer in the past year.



intenders: plan to change employer within the next year.



most important attributes switchers vs stayers.

switchers

2019

18%



2020

18%

changed employer in the
past year.

stayers

2019

82%



2020

82%

stayed with their employer in
the past year.

most important attributes



● switchers

● stayers



most important attributes intenders.

intenders

2019

24%

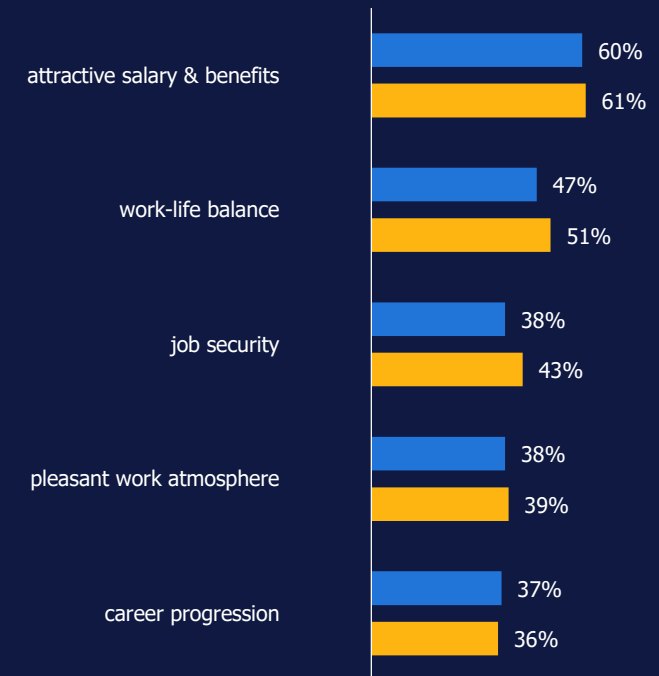


2020

25%

plan to change employer
within the next year.

most important attributes among intenders



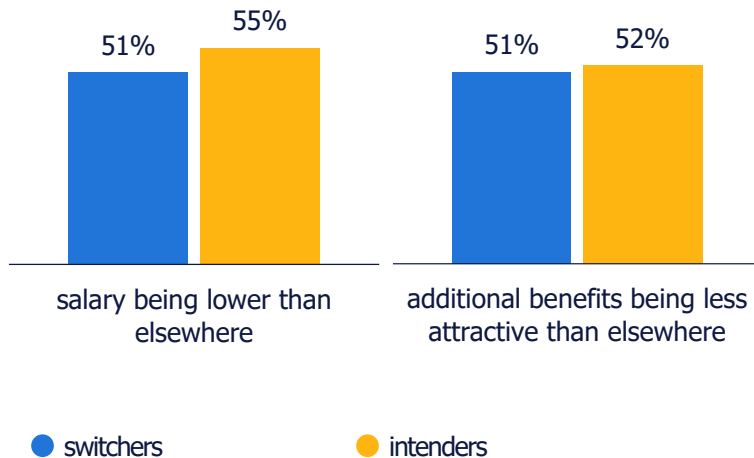
● 2020

● 2019



switchers vs intenders financial reasons.

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



canada

52%

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

north america

58%

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

49%

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

54%

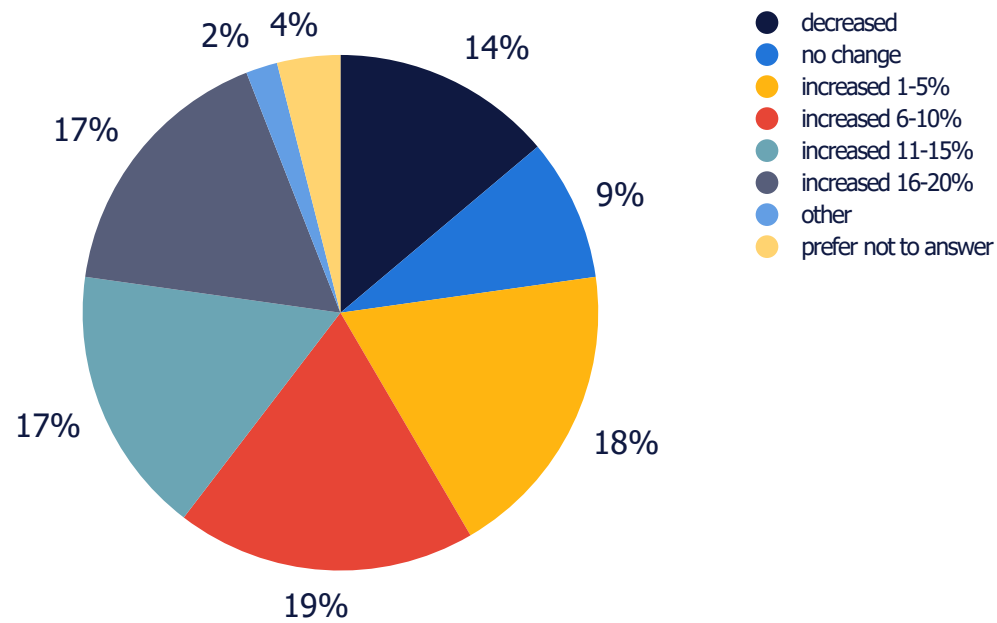
is leaving or planning to do so because of less attractive additional benefits compared to elsewhere.



switching for higher salary

nearly 4 in 10 switchers get a 1 to 10% pay increase.

salary change after switch



canada

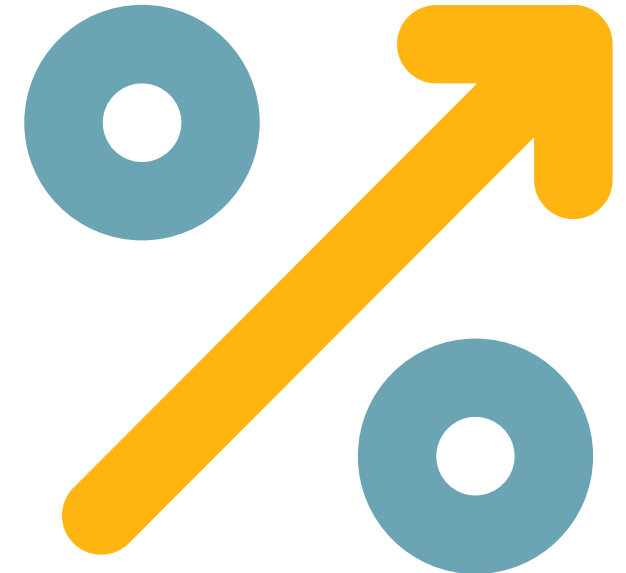
38%

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

north america

39%

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



switchers vs intenders

emotional reasons.

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

canada

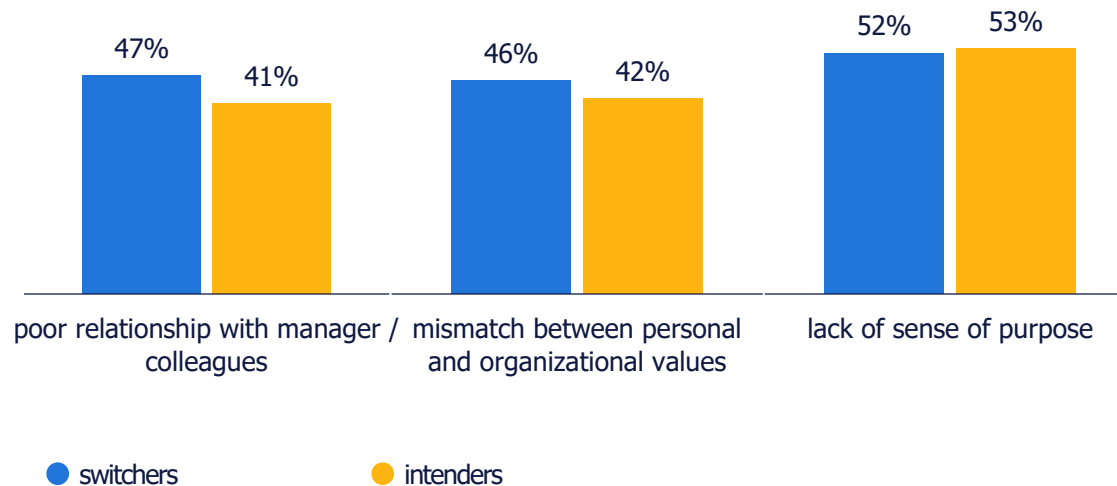
66%

find non-monetary benefits important.

north america

66%

find non-monetary benefits important.



reasons to leave by profile.

salary being lower than elsewhere

56%

of the **millennials** are likely to leave an employer if they receive a higher salary elsewhere. This is higher when compared to gen z (45%).

additional benefits being less attractive

52%

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

poor relationship with manager

42%

of the **millennials and gen x**, respectively, agree that a poor relationship with their manager is a serious reason to consider working elsewhere. This is higher when compared to gen z.

mismatch between personal and organizational values

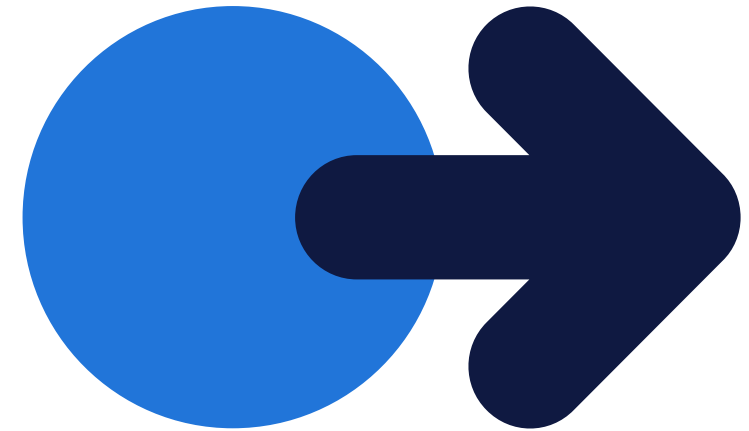
44%

of the **millennials** would leave their employer if the organizational values do not match their personal values. This is higher when compared to gen z (33%).

lack of sense of purpose

54%

of the **gen x** may leave or have left their employer if they lack a sense of purpose in their job. This is higher when compared to gen z (42%).



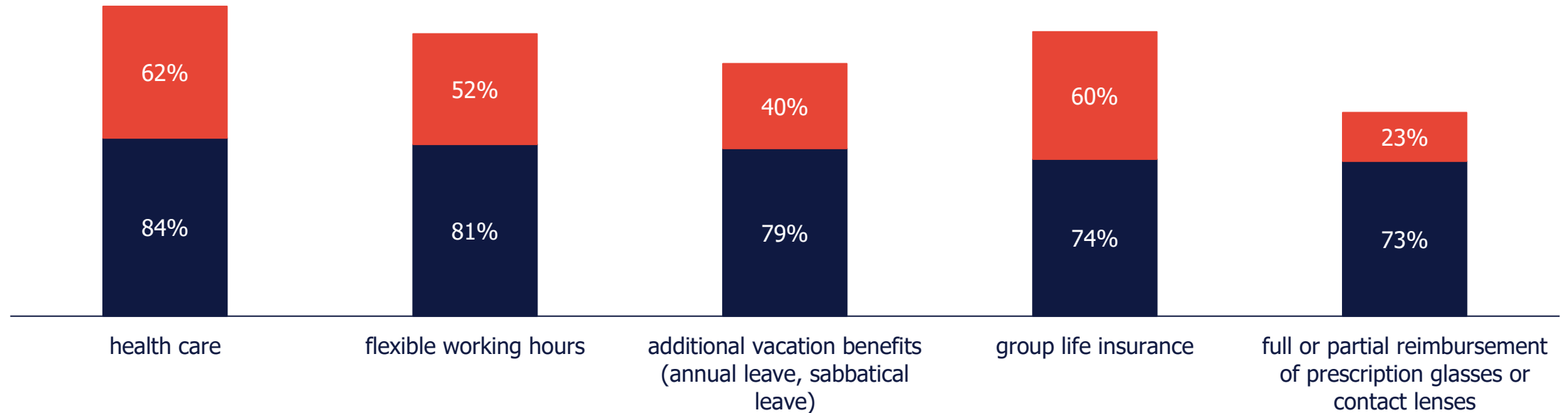
additional
benefits

in focus.



employee benefits that workforce in canada finds attractive and are received.

top 5 most attractive benefits & received



● attractive ● attractive & received

[click here](#) for full results.



most attractive benefits by profile.

gen z (18-24)

42%

of the gen z's find sports and leisure package attractive as an employment benefit. This is higher when compared to boomers (26%).

gen x (35-54)

83%

of the gen x's find additional vacation benefits (annual leave, sabbatical leave) attractive as an employment benefit. This is higher when compared to gen z (66%) and millennials (75%).

millennials (25-34)

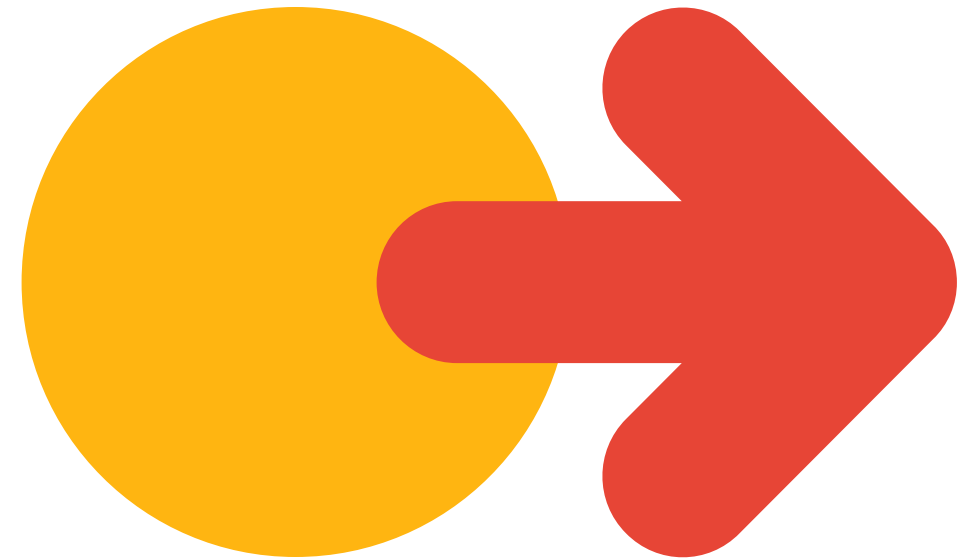
56%

of the millennials find childcare services and support attractive as an employment benefit. This is higher when compared to gen x (41%) and boomers (23%).

boomers (55-64)

81%

of the boomers find full or partial reimbursement of prescription glasses or contact lenses attractive as an employment benefit. This is higher when compared to gen z (62%) and millennials (70%).

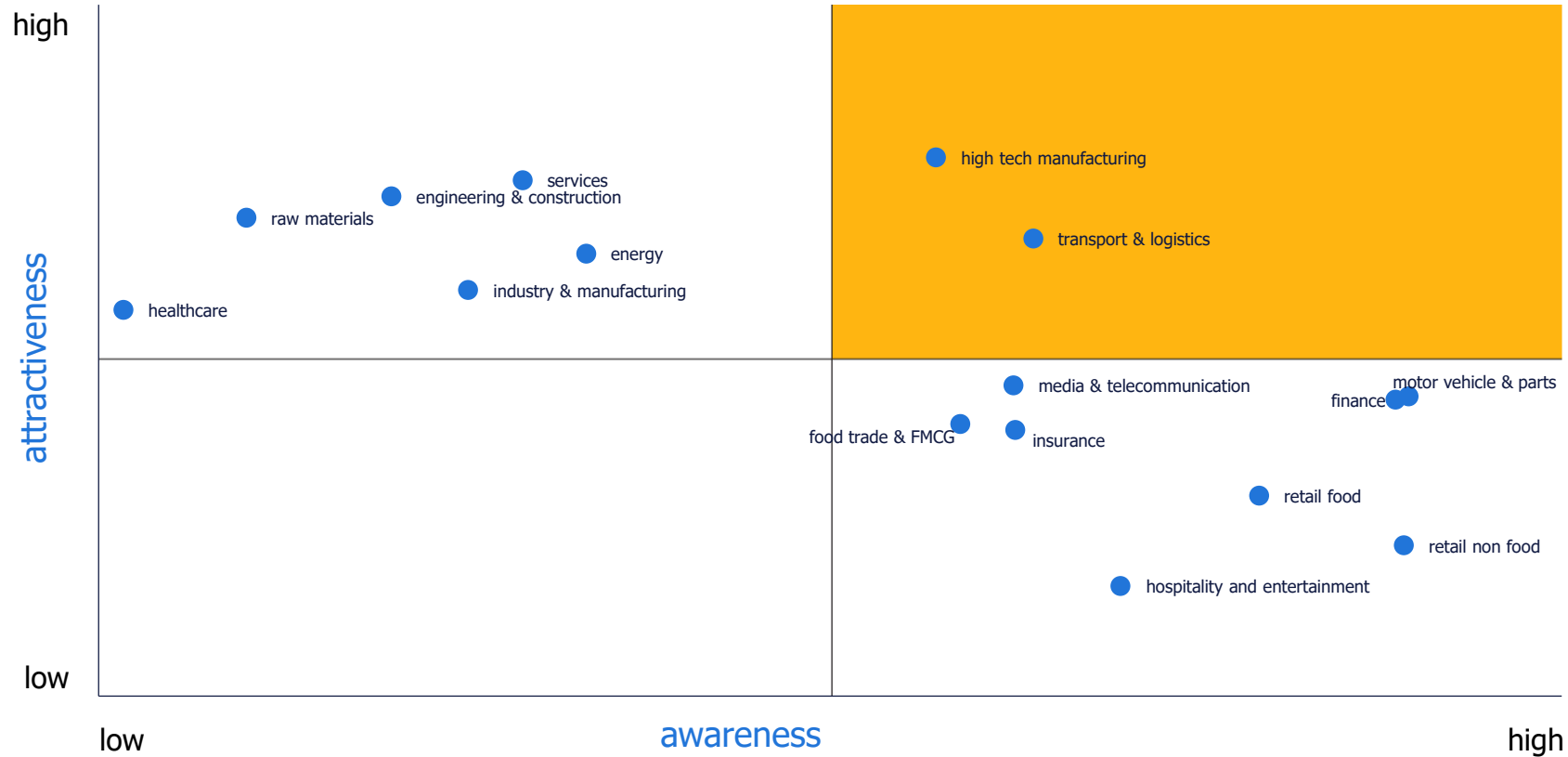


sector



insights.

top performing sectors in canada 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.



canada's best performing companies by sector.

1/2

sector	top 3 companies		
	1	2	3
01 high tech manufacturing	Canadian Solar Inc.	Thomson Reuters Canada Limited	CAE Inc.
02 services	WSP Canada	Accenture Canada Holdings Inc.	IBM Canada Ltd.
03 engineering & construction	WSP Canada	Stantec Inc.	Aecon Group Inc.
04 raw materials	GoldCorp Inc.	Barrick Gold Corporation	Rio Tinto Alcan Inc.
05 transport & logistics	Air Canada	Canadian National Railway Company (CN)	WestJet Airlines Ltd.
06 energy	Nexen Energy ULC	Ensign Energy Services Inc.	Toronto Hydro
07 industry & manufacturing	Canadian National Railway Company (CN)	Novartis	GlaxoSmithKline
08 healthcare	Valeant Pharmaceutical	Extendicare Limited Partnership	Chartwell Master Care LP
09 media & telecommunication	Thomson Reuters Canada Limited	Alcatel Lucent	TELUS Corporation
10 motor vehicle & parts	Honda Canada Inc.	Ford Motor Company of Canada, Limited	Toyota Motor Manufacturing Canada



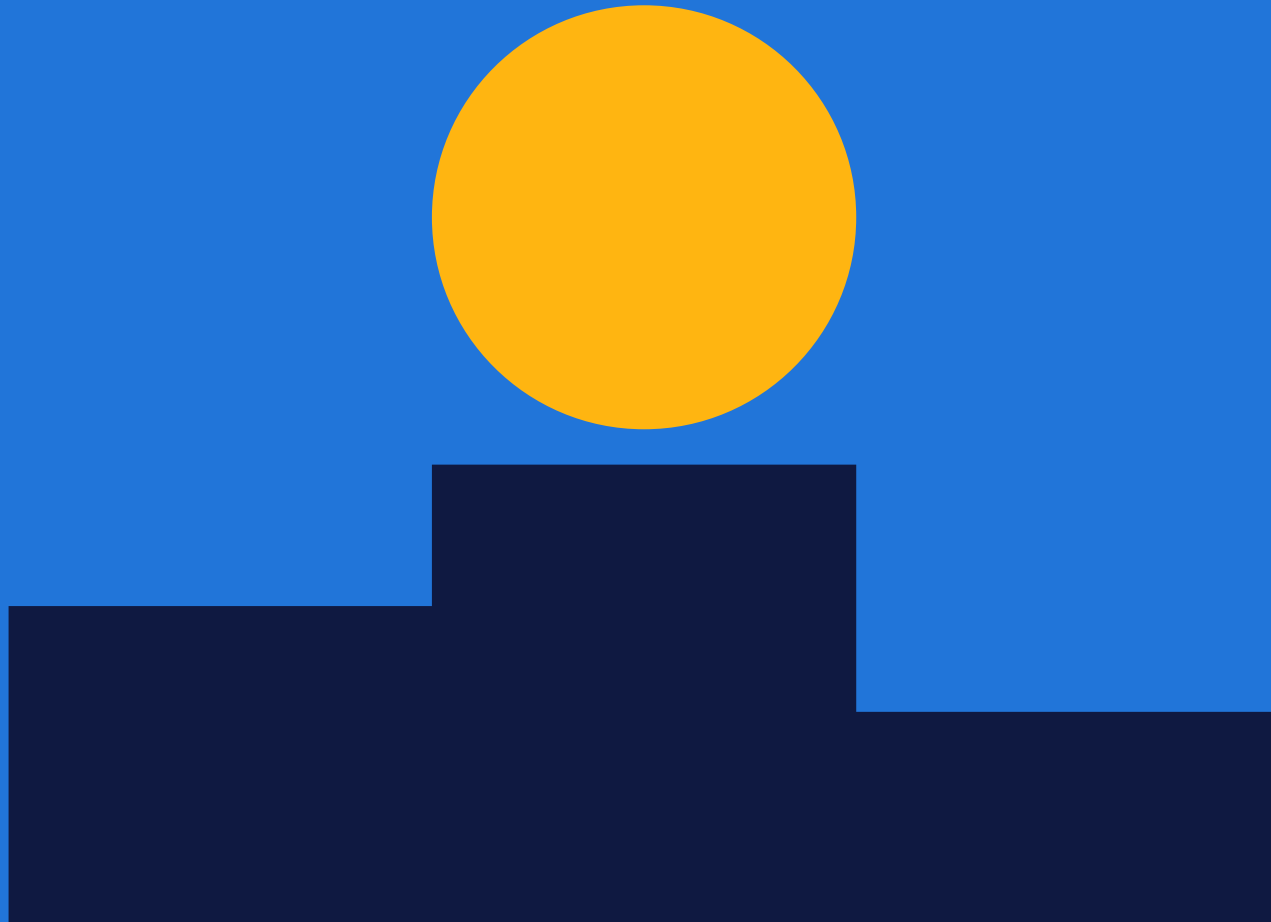
canada's best performing companies by sector.

2/2

sector	top 3 companies		
	1	2	3
11 finance	The Toronto-Dominion Bank (TD Bank)	Industrial Alliance	Royal Bank of Canada
12 food trade & fmcg	Compass Group Canada Ltd.	Kraft Canada Inc	Molson Coors
13 insurance	Industrial Alliance	Aviva Canada Inc.	Sun Life Financial Inc.
14 retail food	Brewers Retail Inc (The BeerStore)	Costco Wholesale Canada Ltd.	Canada Safeway Limited
15 retail non food	Johnson & Johnson	Indigo Books & Music Inc.	Best Buy Canada Ltd.
16 hospitality and entertainment	AccorHotels (Fairmont Hotels)	Compass Group Canada Ltd.	Cineplex Inc.



top



employers.

top employers to work for in canada.

top 10 employers 2020

- 01 Canadian Solar Inc.
- 02 WSP Canada
- 03 Nexen Energy ULC
- 04 Air Canada
- 05 Canadian National Railway Company (CN)
- 06 Ensign Energy Services Inc.
- 07 Novartis
- 08 Thomson Reuters Canada Limited
- 09 Accenture Canada Holdings Inc.
- 10 GoldCorp Inc.

top 10 employers 2019

- 01 Microsoft Canada
- 02 IBM Canada Ltd.
- 03 WestJet Airlines Ltd.
- 04 Canadian National Railway Company (CN)
- 05 Indigo Books & Music Inc.
- 06 PricewaterhouseCoopers LLP (PwC)
- 07 Air Canada
- 08 Coca-Cola Refreshments Canada Company
- 09 ATCO Ltd.
- 10 SNC-Lavalin Group Inc. - Groupe SNC-Lavalin Inc.

canada's top 3 EVP drivers of the top 5 companies.

top 5 companies	1	2	3
1 Canadian Solar Inc.	uses latest technologies	very good reputation	financially healthy
2 WSP Canada	very good reputation	financially healthy	uses latest technologies
3 Nexen Energy ULC	attractive salary & benefits	uses latest technologies	very good reputation
4 Air Canada	financially healthy	uses latest technologies	attractive salary & benefits
5 Canadian National Railway Company (CN)	financially healthy	attractive salary & benefits	job security



canada's top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	GlaxoSmithKline	Finning International Inc. (Caterpillar)	Merck KGaA
career progression	Ensign Energy Services Inc.	WSP Canada	GlaxoSmithKline
financially healthy	The Toronto-Dominion Bank (TD Bank)	Royal Bank of Canada	Costco Wholesale Canada Ltd.
gives back to society	Canadian Solar Inc.	WSP Canada	Progressive Waste Solutions Ltd.
interesting job content	Ensign Energy Services Inc.	WSP Canada	CAE Inc.
job security	Toronto Hydro	WSP Canada	KPMG LLP
pleasant work atmosphere	Canadian Solar Inc.	WSP Canada	GlaxoSmithKline
uses latest technologies	IBM Canada Ltd.	GlaxoSmithKline	Huawei
very good reputation	WSP Canada	Canadian Solar Inc.	IBM Canada Ltd.
work-life balance	WSP Canada	Progressive Waste Solutions Ltd.	Nexen Energy ULC



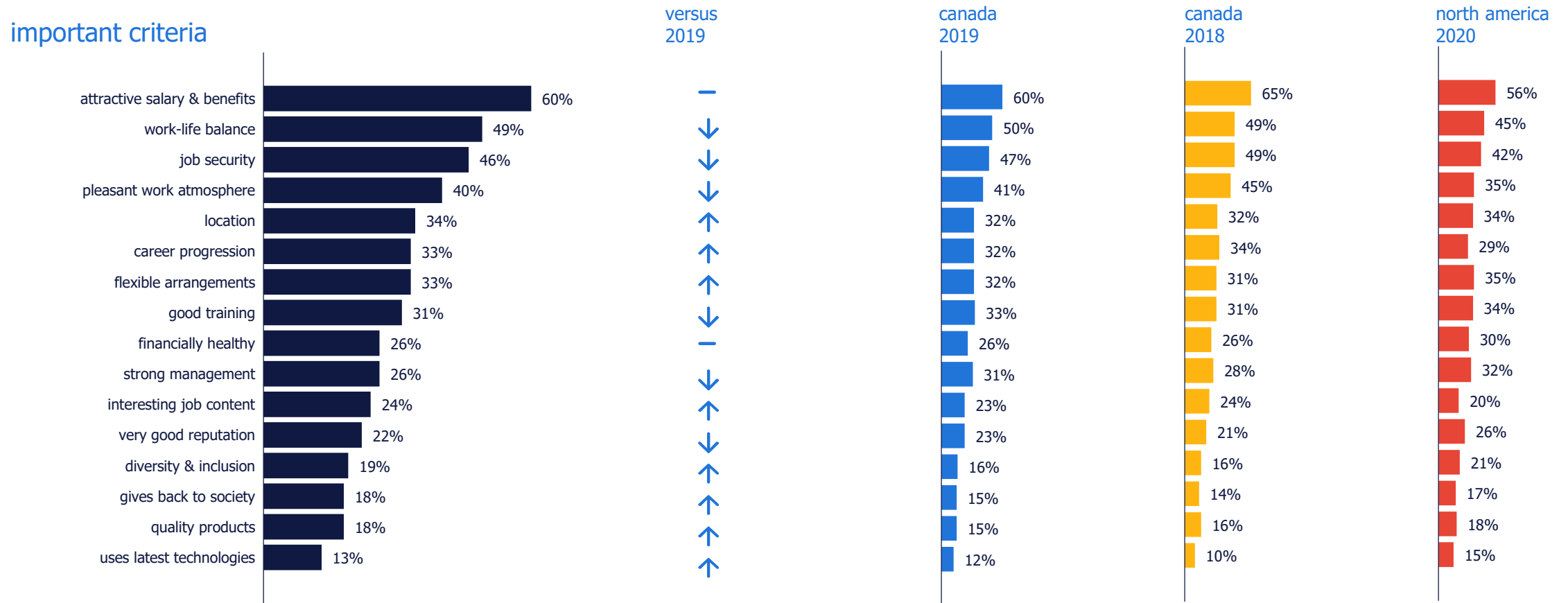
deep dive
EVP drivers

2020 employer
brand research.



what potential employees want

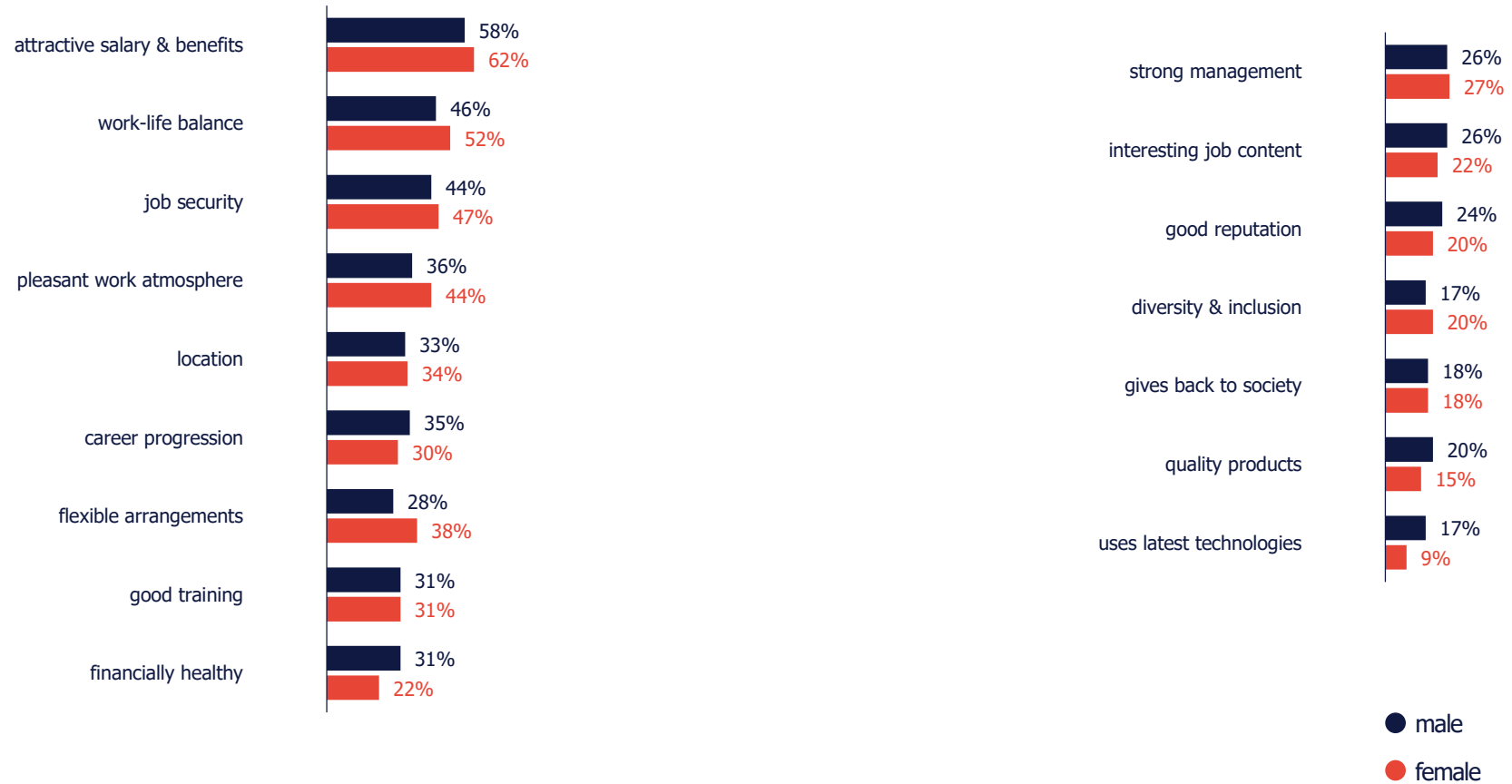
the most important criteria when choosing an employer.



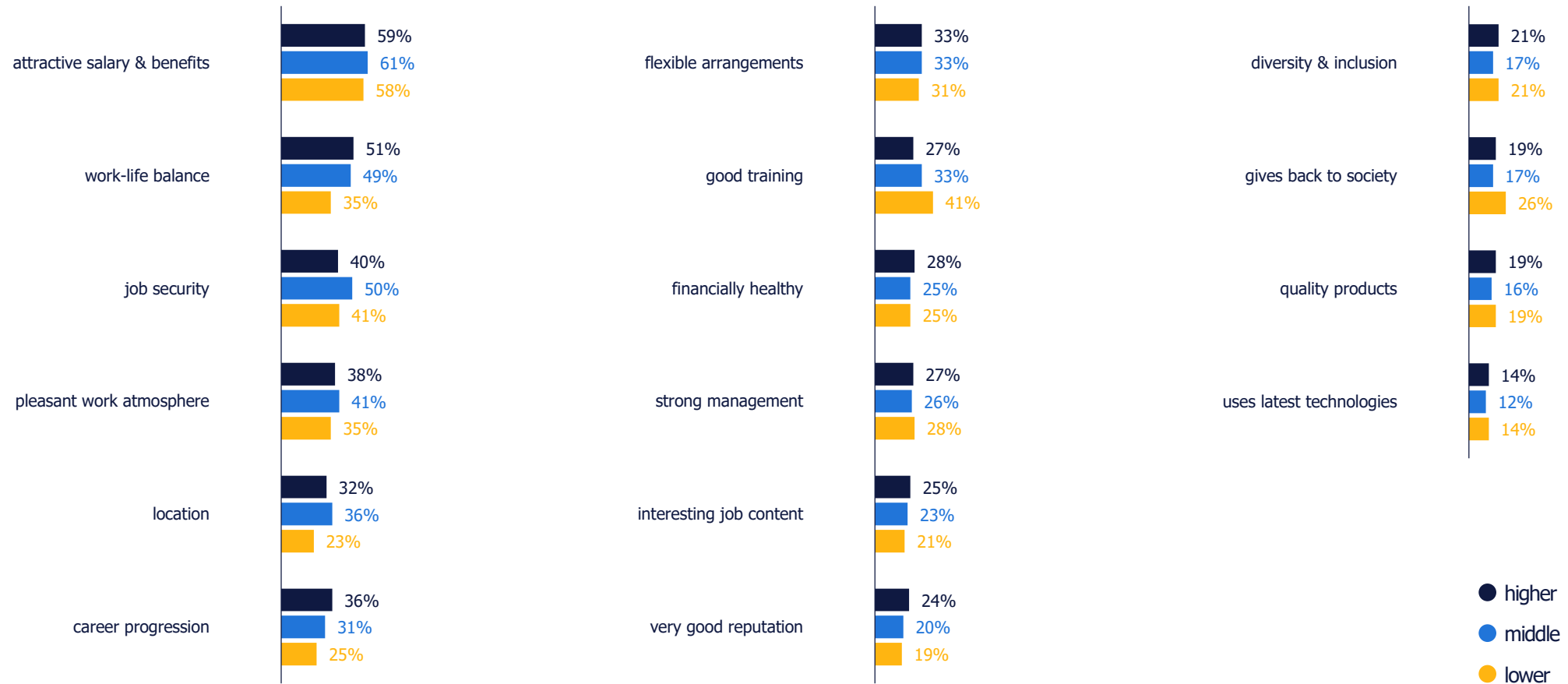
Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.



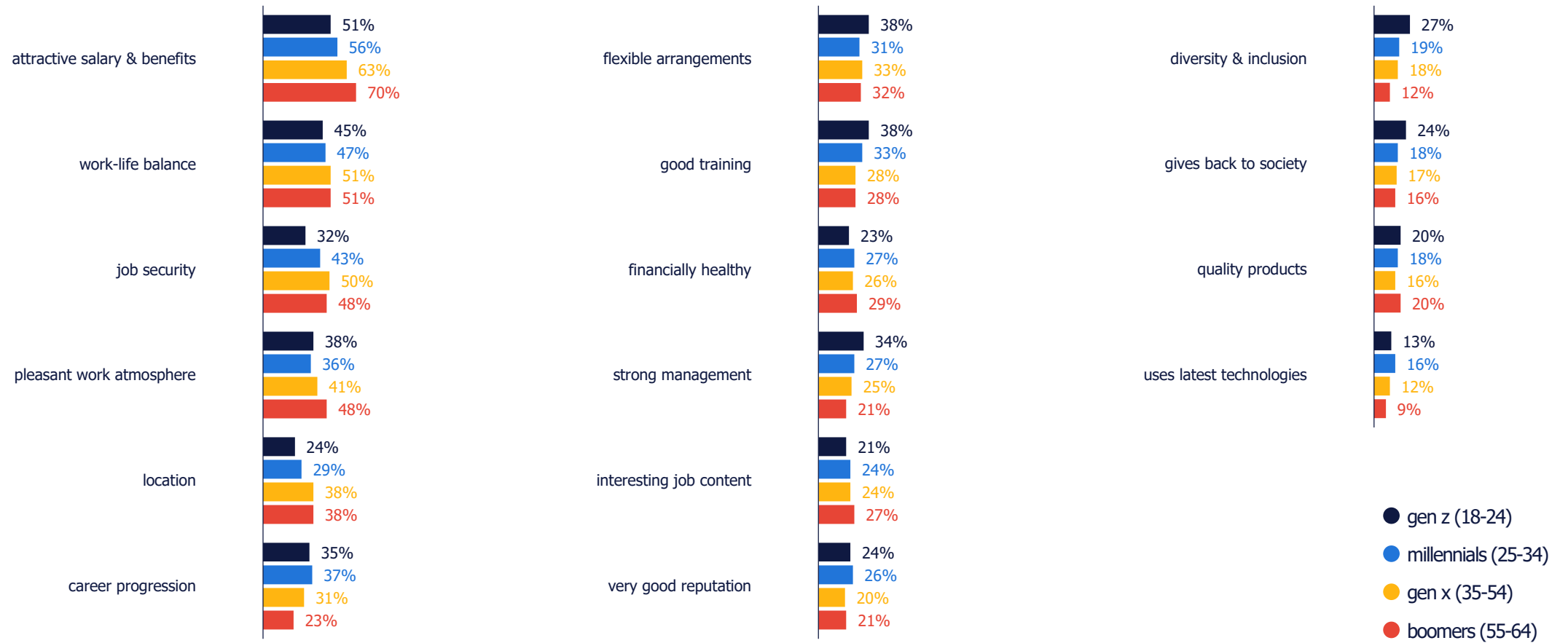
EVP driver importance by gender.



EVP driver importance by education.



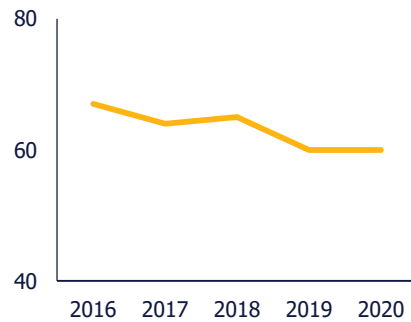
EVP driver importance by age.



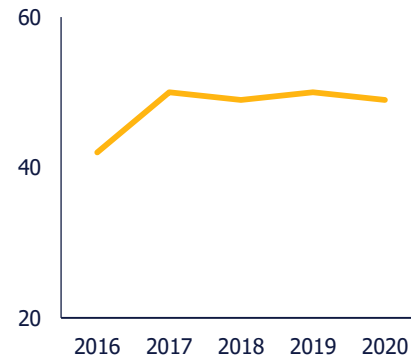
EVP driver importance trends, total.

1/2

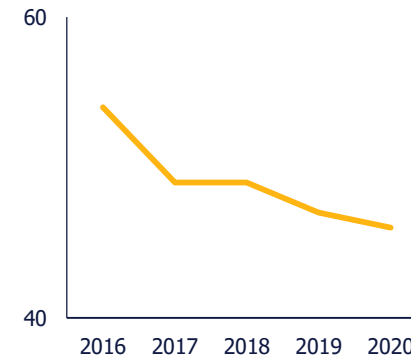
attractive salary & benefits



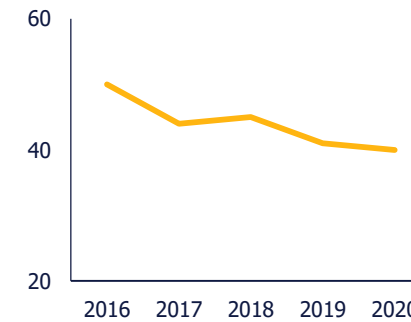
work-life balance



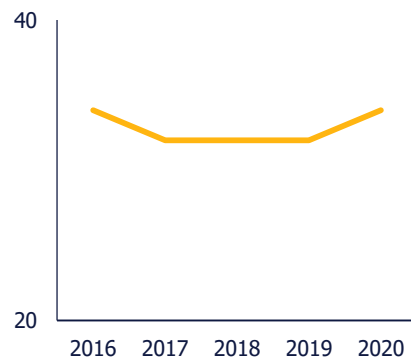
job security



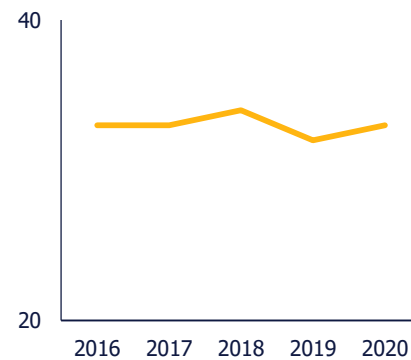
pleasant work atmosphere



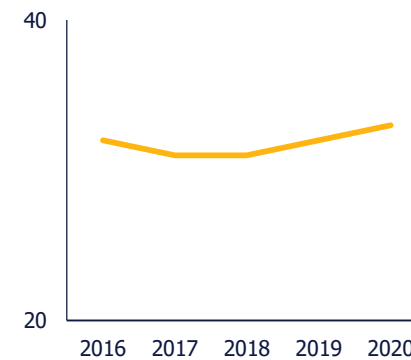
location



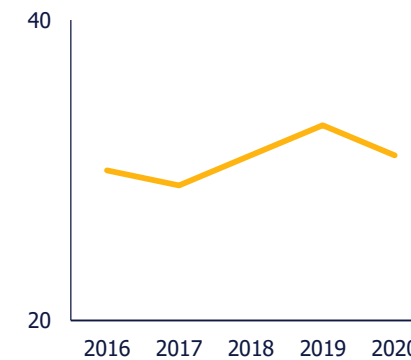
career progression



flexible arrangements



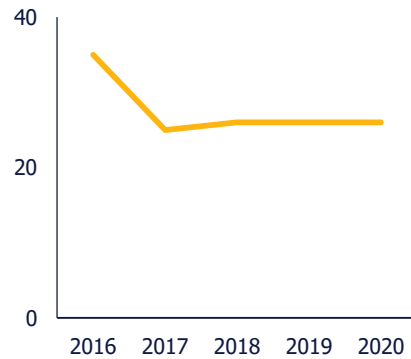
good training



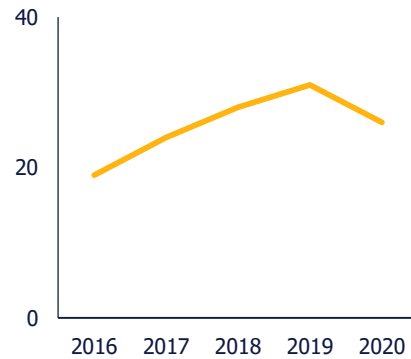
EVP driver importance trends, total.

2/2

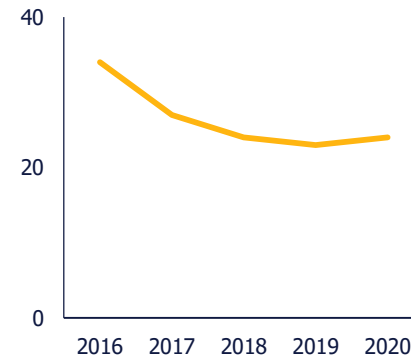
financially healthy



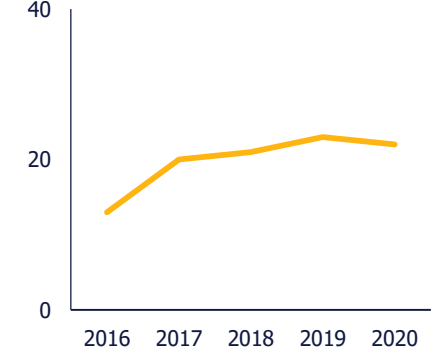
strong management



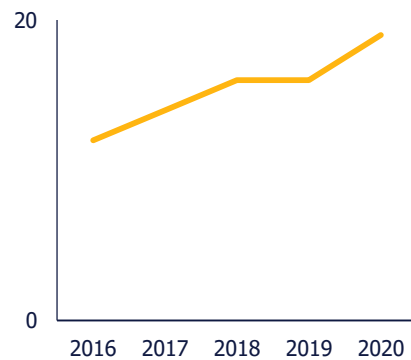
interesting job content*



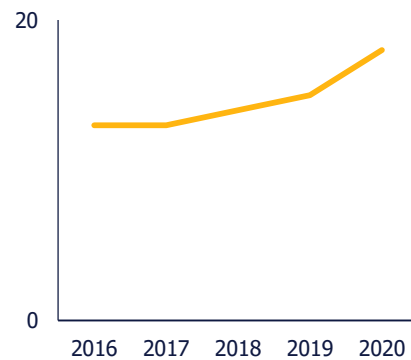
very good reputation**



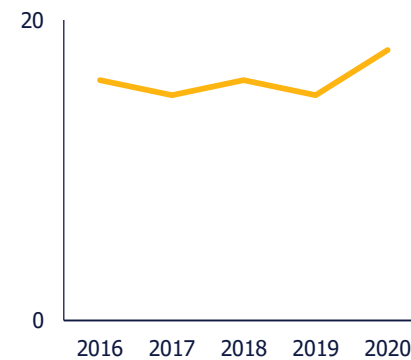
diversity & inclusion



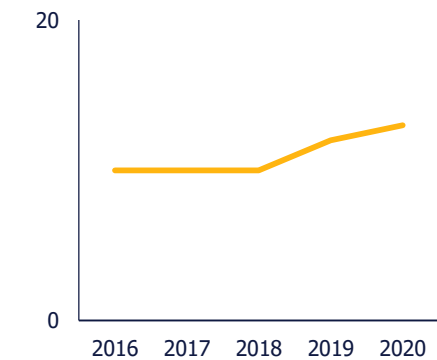
gives back to society



quality products



uses latest technologies



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



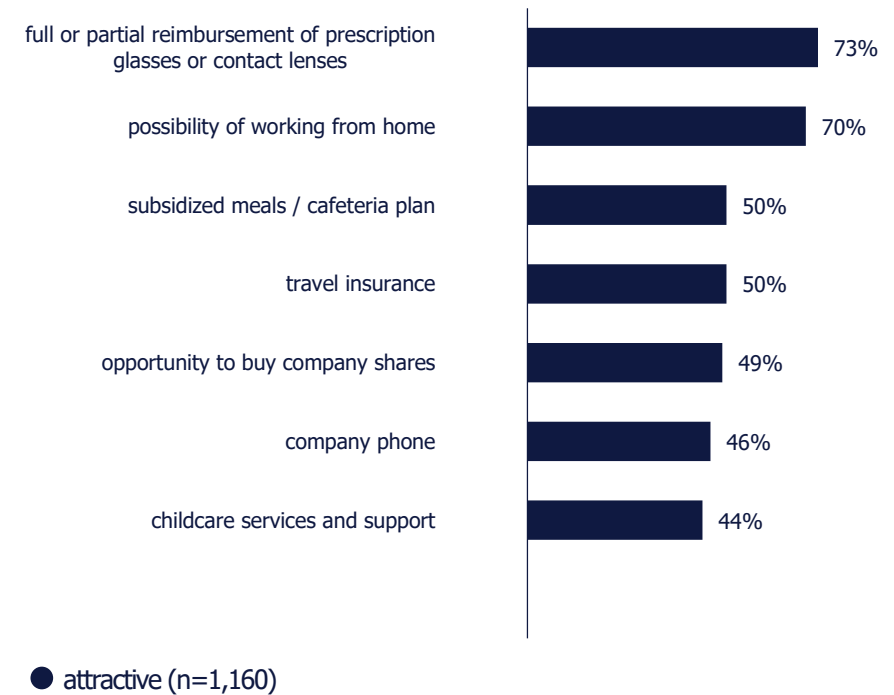
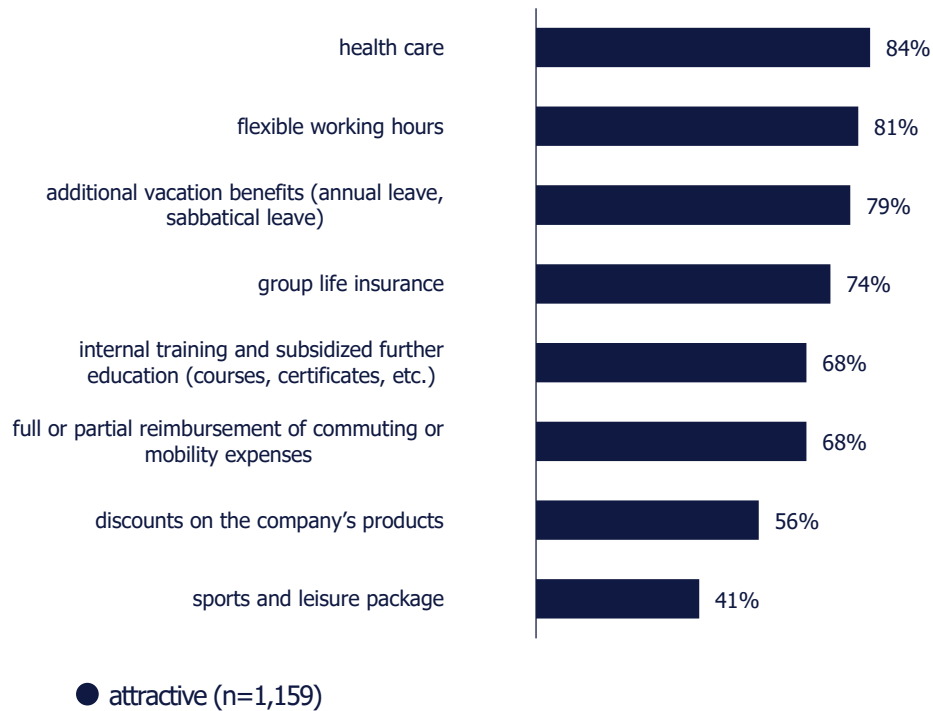
deep dive
employers



2020 employer
brand research.

employee benefits that canadians find attractive.

attractive benefits

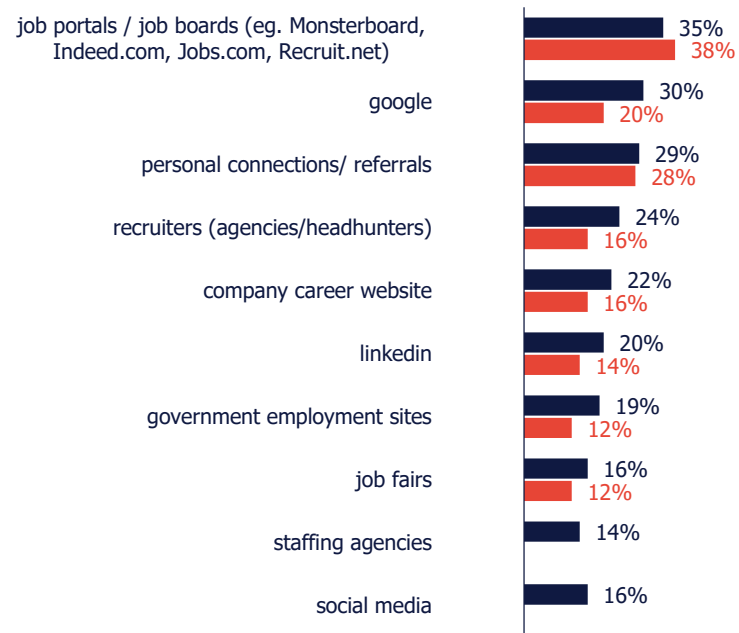


*the 15 benefits were shown randomly in two sets of 8 and 7 benefits, respectively, each set shown to 50% of the sample. For each bar chart, the base is respondents who are employed and received that particular set on the screen.

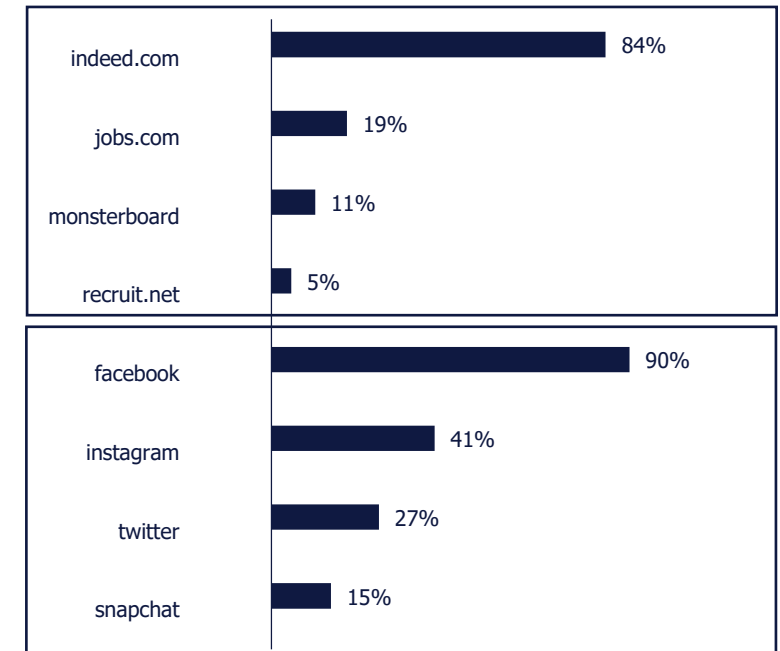


how do workers in canada find new job opportunities.

channels used to find new job opportunities



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

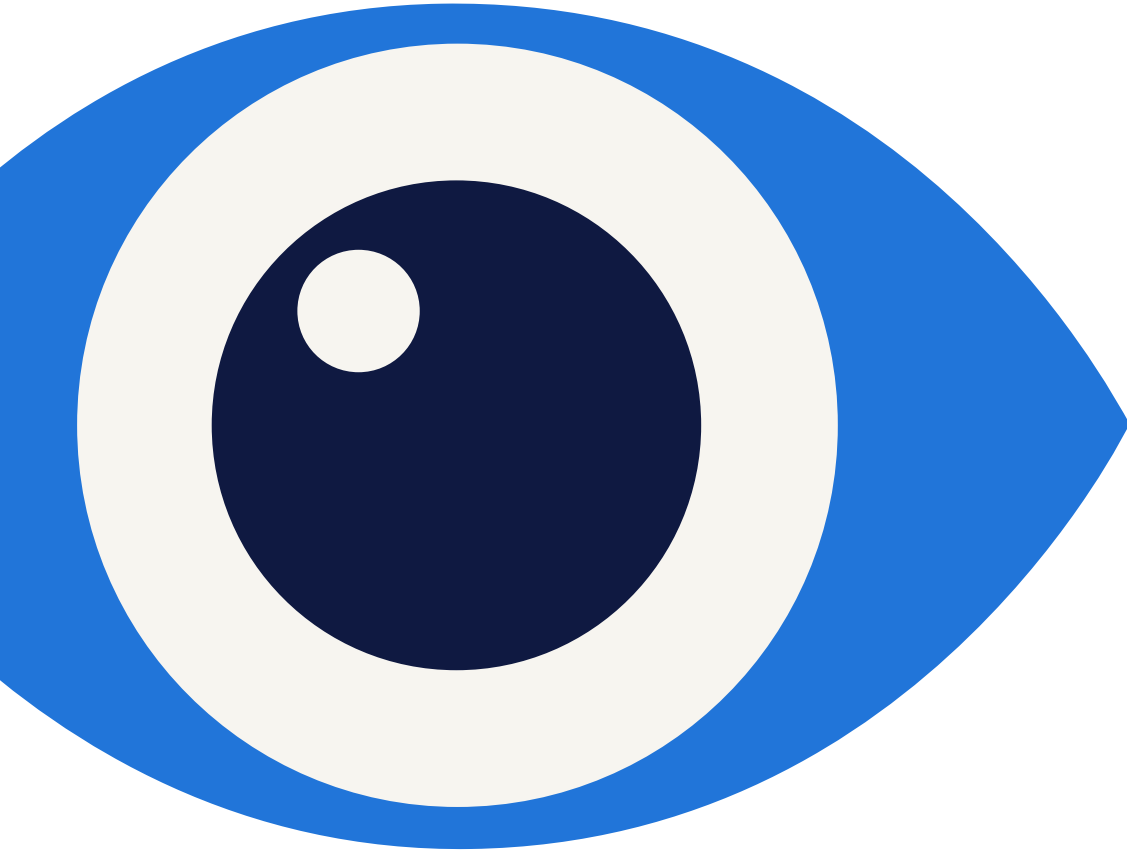


● 2020

● 2019



perception of employer offer in canada and the region.



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

employers in canada are perceived to offer.

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

employers in north america are perceived to offer.

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

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

1/2

	top 3 EVP drivers		
sector	1	2	3
01 high tech manufacturing	uses latest technologies	financially healthy	attractive salary & benefits
02 services	financially healthy	uses latest technologies	very good reputation
03 engineering & construction	uses latest technologies	attractive salary & benefits	financially healthy
04 raw materials	financially healthy	attractive salary & benefits	uses latest technologies
05 transport & logistics	financially healthy	uses latest technologies	very good reputation
06 energy	financially healthy	attractive salary & benefits	uses latest technologies
07 industry & manufacturing	financially healthy	uses latest technologies	attractive salary & benefits
08 healthcare	financially healthy	job security	uses latest technologies
09 media & telecommunication	uses latest technologies	financially healthy	career progression
10 motor vehicle & parts	uses latest technologies	financially healthy	attractive salary & benefits



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

2/2

	top 3 EVP drivers		
sector	1	2	3
11 finance	financially healthy	uses latest technologies	job security
12 food trade & FMCG	financially healthy	very good reputation	uses latest technologies
13 insurance	financially healthy	uses latest technologies	very good reputation
14 retail food	financially healthy	very good reputation	uses latest technologies
15 retail non food	financially healthy	very good reputation	uses latest technologies
16 hospitality and entertainment	financially healthy	very good reputation	uses latest technologies



methodology

2020 employer
brand research.



methodology

why smart sampling?

Since REBR 2017 companies are evaluated between 140 and 400 respondents. The actual number of evaluations per company depends on the awareness of the company.

The error margin is determined by the % of respondents giving a certain answer and the sample size to which the question has been asked. The highest error margin occurs when 50% of the respondents give a certain answer. The error margin is lower when 30% (or 70%) of the respondents give a certain answer.

example

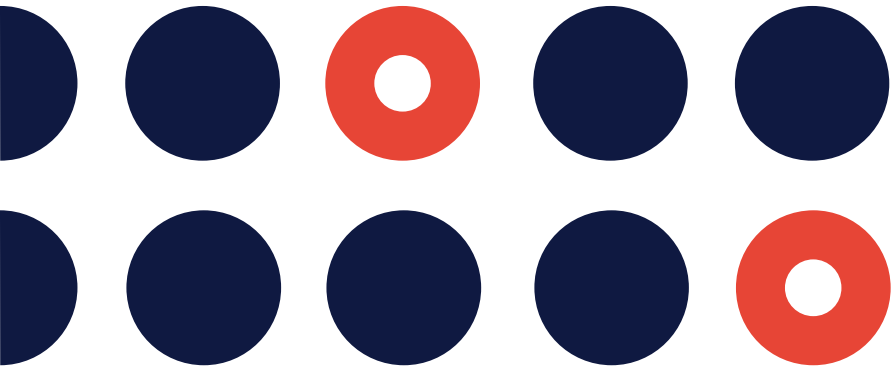
140 respondents have evaluated company X. Of these 140, 50% find the company nice to work for. Taking the error margin at $n=140/50\%$ into account, the real answer lies between 42% and 58%.

400 respondents have evaluated company Y and of these 400, 50% finds the company nice to work for. Taking the error margin at $n=400/50\%$ into account, the real answer lies between 45% and 55%.

1200 respondents have evaluated company Z and of these 1200, 50% finds the company nice to work for. Taking into account the error margin at $n=1200/50\%$, the real answer lies between 47% and 53%.

Therefore, the difference in error margin is very small between $n=1200$ and $n=400$ evaluations per company (5% margin vs 3% margin at the most). As such it can be concluded that maximum 400 evaluations per company are sufficient in order to determine a reliable attractiveness per company.

In practice, this means that every company with an awareness over 35% will have max 400 respondents evaluating the company. Companies with an awareness below 35% will be evaluated by 140 to 400 people (depending on awareness).



source bibliography.

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- 5 <https://www.webershandwick.com/uploads/news/files/EmployerBrandCredibilityGap.pdf>
- 6 https://business.linkedin.com/content/dam/business/talent-solutions/global/en_us/c/pdfs/ultimate-list-of-employer-brand-stats.pdf
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randstad

human forward.

