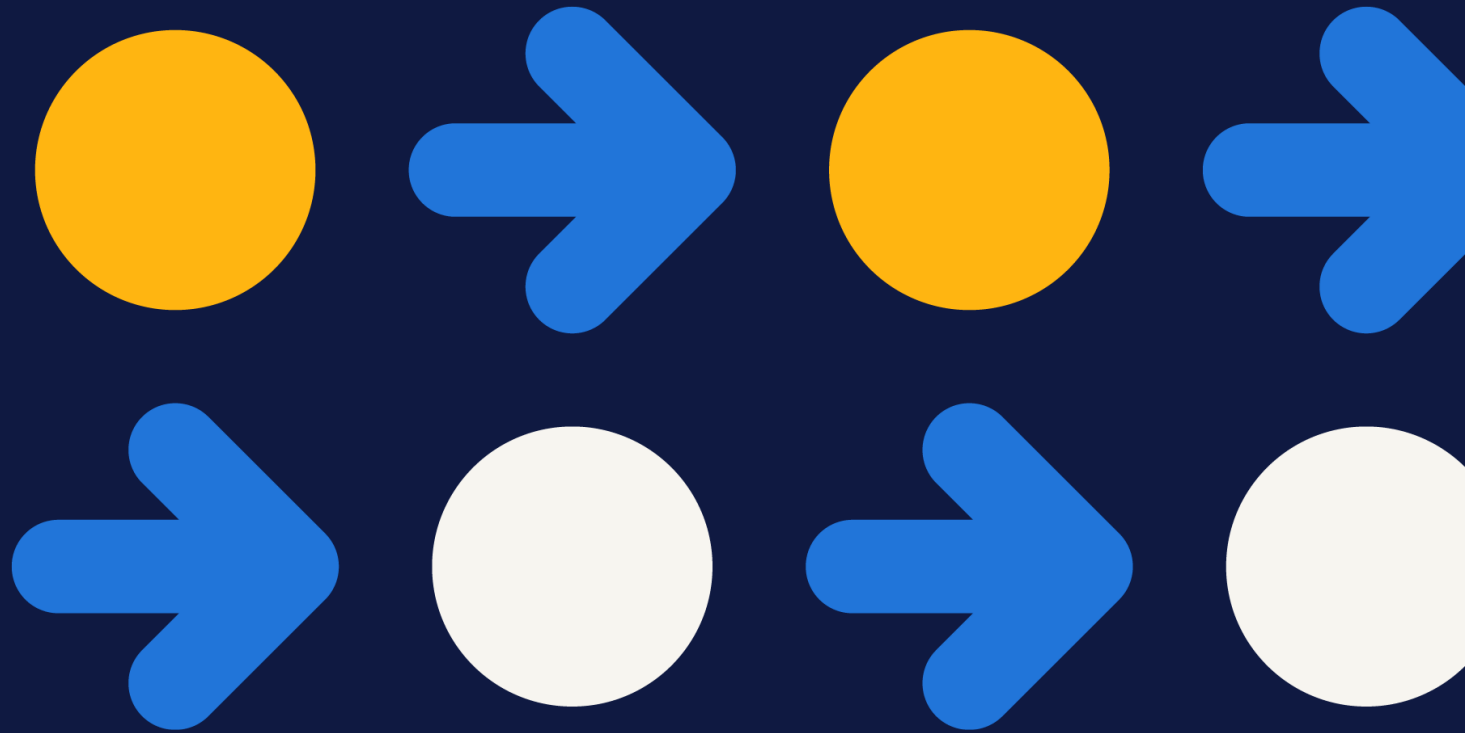


employer brand research 2021



russia.

 **randstad**
human forward.

ancor
discover perspective.

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 largest employers in largest sectors that are 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.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.

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.⁵

1-2x

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

#1

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

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

52%

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



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

- 13,842 respondents

fieldwork

- online interviews
- january 2021

length of interview

- 16 minutes

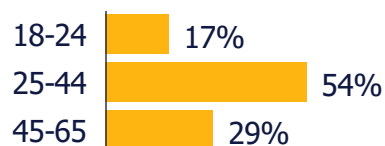
sample composition in russia

socio-demographics, employment status, region.

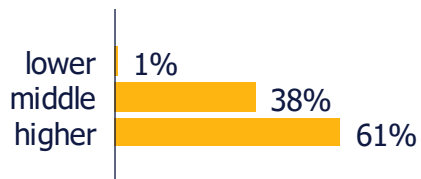
gender



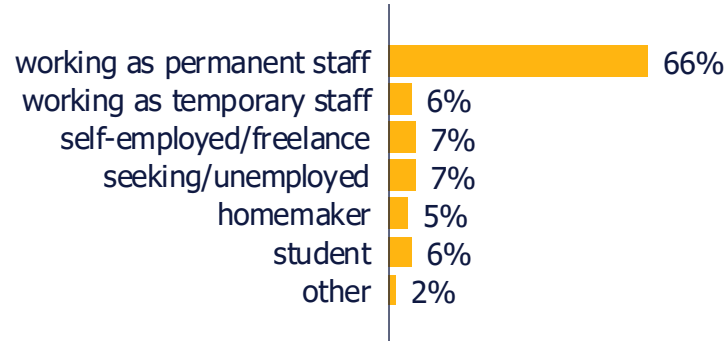
age



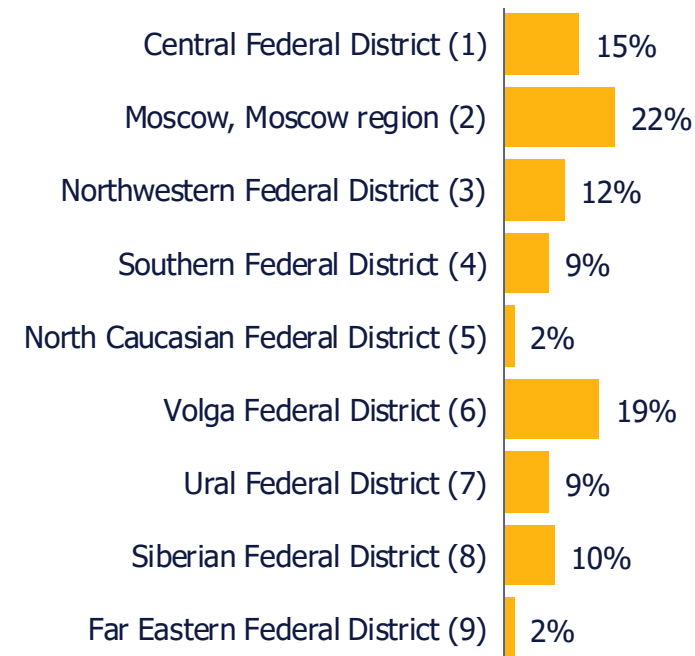
education



employment status



region

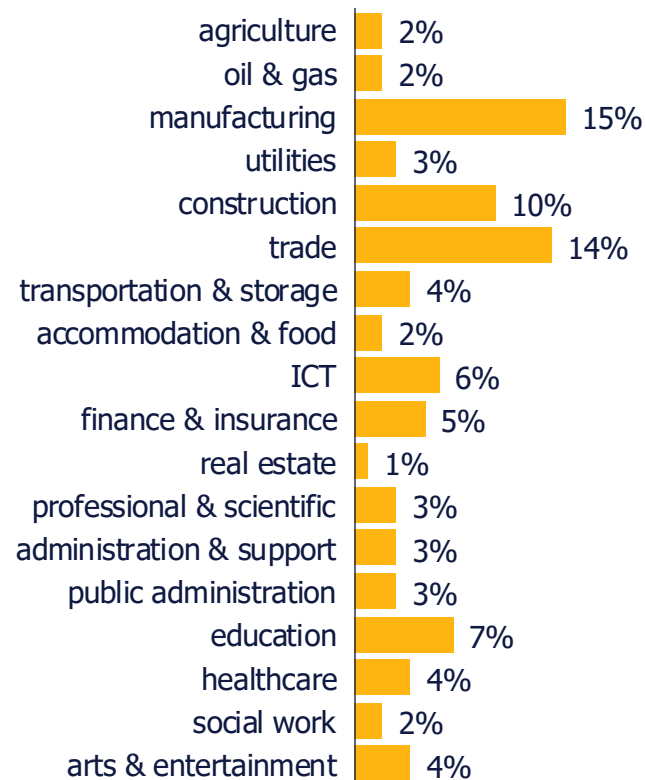


total sample: 13,842
fieldwork: january 2021

sample composition in russia

sector, function.

sector



function



base: currently employed (n=10,888)



russia

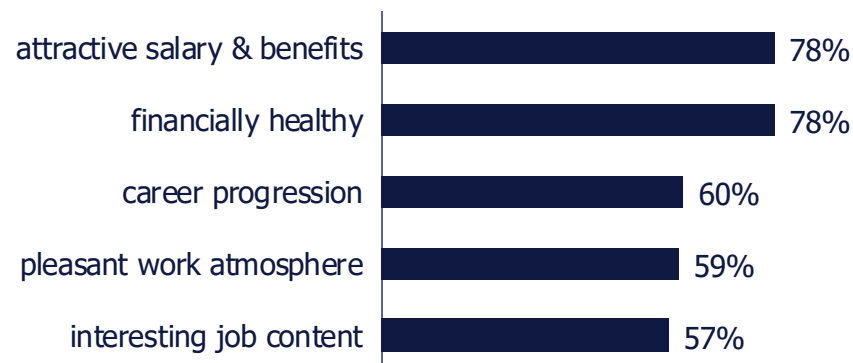
employer attractiveness.



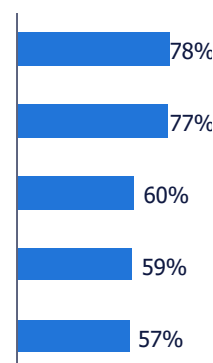
what potential employees want

the 5 most important drivers when choosing an employer.

top 5 most important drivers



cis 2021



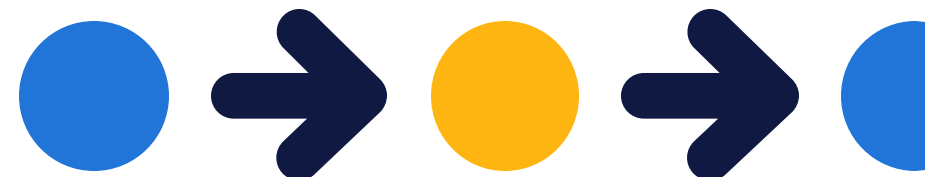
russia top 5 drivers 2020

- 01 attractive salary & benefits
- 02 financially healthy
- 03 interesting job content
- 04 career progression
- 05 pleasant work atmosphere

russia top 5 drivers 2019

- 01 attractive salary & benefits
- 02 financially healthy
- 03 interesting job content
- 04 career progression
- 05 pleasant work atmosphere

*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 financially healthy

A financially healthy company is seen as the most important driver in Russia and is mentioned more often by women, the higher-educated and those aged 35 and older. Salary & benefits are equally important with the same pattern among subgroups.

Career progression, pleasant work atmosphere and interesting job content are all top 5 important drivers, closely together, but at a significant difference from the top 2. A COVID-19 safe work environment is one of the least important drivers. Lower-educated employees are considerably less demanding as they consider on average 3 drivers to be important to them, as opposed to the higher-educated and women who point out on average 9 drivers to be essential to them.

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

employers' proposition

good reputation and financial health

Russian employees give their employers the highest ratings on very good reputation and financial health, followed by job security. A COVID-19 safe working environment is highly valued, while the possibility to work from home is ranked lowest.

Women rate their employer better than men on good reputation and a COVID-19 safe work environment. Men give a better appreciation to salary & benefits and career progression. However, employers receive the second lowest score on career development.

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

recommended employer focus

career progression

It can be seen as an obvious inconsistency that employees rate their salary & benefits rather low when it comes to the employee value proposition of their own employer, despite it being one of the most important drivers to them. There is less of a gap in this respect when it comes to financial health.

Next to this, career progression stands out as the driver that is of the third-highest in importance to employees, however, the perception in the country is that employers lag offering such opportunities. It is, therefore, recommended that the average employer in Russia pays more attention to employee career progression.

what do potential employees want

job collars in focus.

white-collar

41%

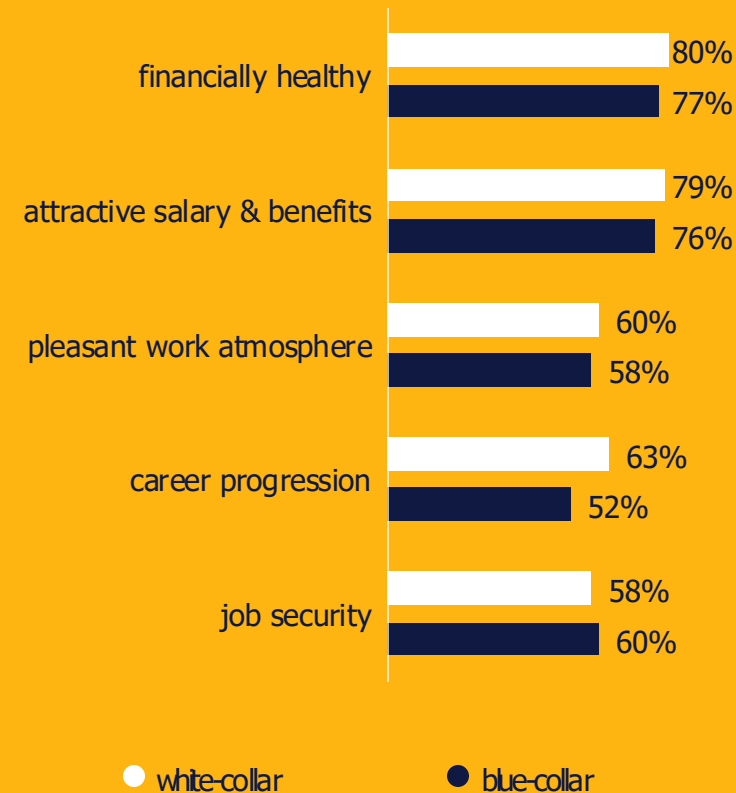
of white-collar employees consider the possibility to work remotely considerably more important than blue-collar workers (29%).

blue-collar

55%

of blue-collar workers consider interesting job content considerably less important than white-collar professionals do (60%). The average blue-collar worker is slightly less demanding on what elements an ideal employer should have than white-collar employees.

most important attributes



job-switching behavior



in focus.

switching behavior finding another employer.

1 in 8 Russians changed employer

12% of Russian employees changed their employer in the past 6 months. This is higher among the younger employees (18–24-year old's). A quarter of employees plan to change their employer, and this is also more among the younger generations (18–34-year-olds). Employees who have changed their job find good training a slightly more important EVP driver than employees who have stayed by their employer in the past 6 months.

job portals – top channels to find a new employer

One in two switchers found their employer on job portals (50%), more often so by women and by the higher-educated. HeadHunter is the leading portal in this regard, especially among higher-educated employees and it is followed by Avito, which is more popular among men and youngsters (18–24-year-olds). After job portals, personal connections are often used to find a job (45%) especially by employees aged 35 to 54.



most important attributes switchers vs. stayers.

switchers

2021

12%

changed employer in the
past 6 months.

stayers

2021

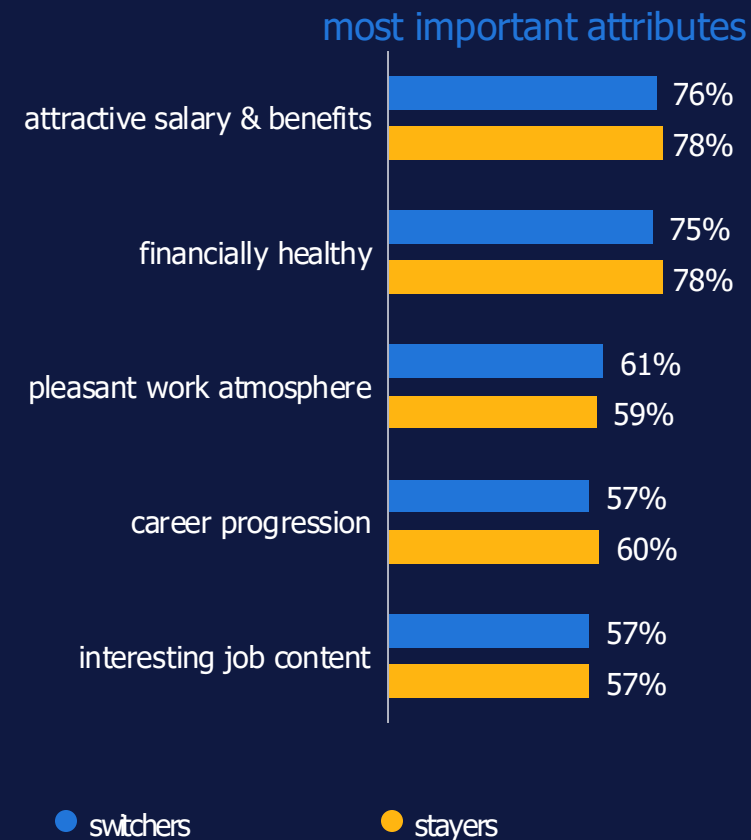
88%

stayed with their employer
in the past 6 months.

2021

17%

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



switching behavior job collars in focus.

white-collar intenders

20%

of white-collar intenders plan to switch to another employer in the next 6 months. This is slightly less when compared to blue-collar intenders (25%). White-collar employees are more likely than blue-collar workers to find jobs using Google and recruiters (22% vs. 14% and 8% vs. 1%, respectively).

blue-collar switchers

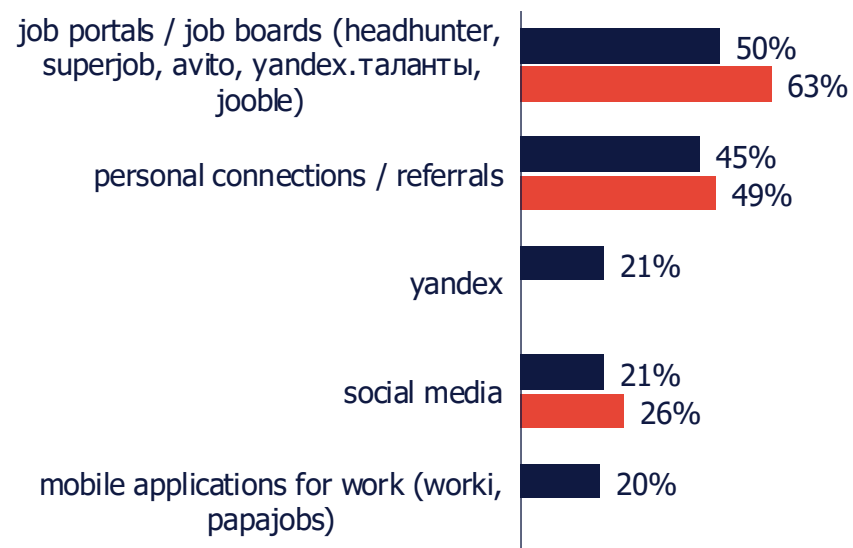
19%

of blue-collar switchers changed employers in the past 6 months, which is considerably higher when compared to white-collar switchers (9%). The choice of channels among blue-collar workers is comparable with the average employee in Russia who switched jobs, which is mainly through job portals.

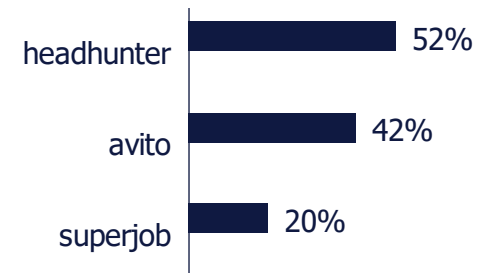


how do employees in russia find new job opportunities.

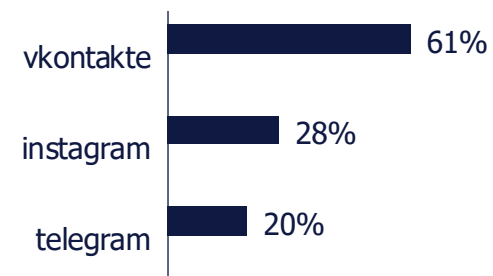
top 5 channels used to find new job opportunities



top 3 job portals



top 3 social media channels



● 2021 ● 2020

COVID-19

in focus.



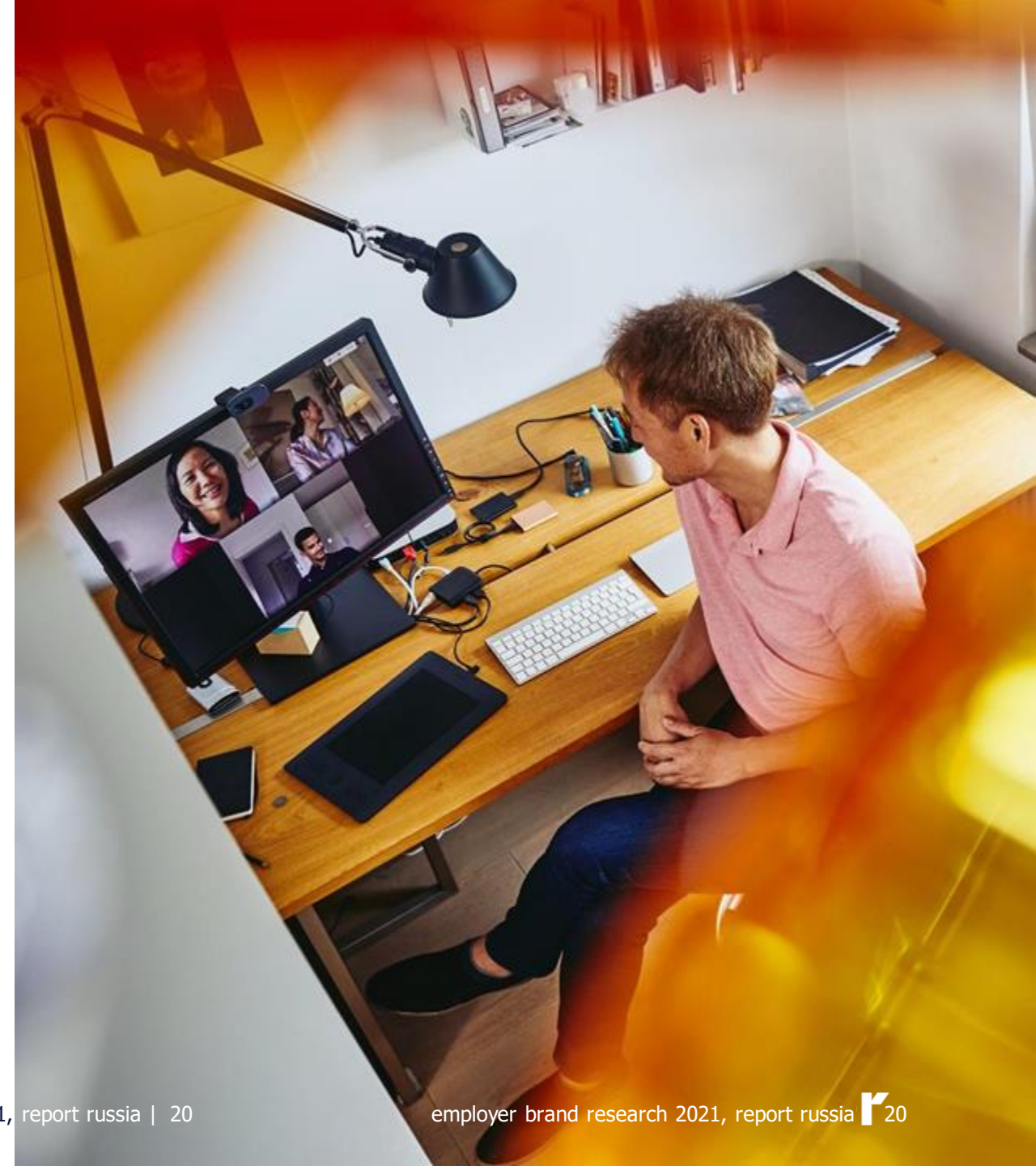
COVID-19 and its impact on the labor market.

possibility of working remotely relatively important

About 2 in 5 Russian employees are attracted by the possibility to work remotely, even though this driver ranks rather low among all other drivers of importance. Women, the higher- educated and those aged 25 to 34 are more inclined to find this driver important, however, still trailing behind other drivers that are more attractive. Part-time employees consider the possibility to work remotely significantly more important than the average workforce.

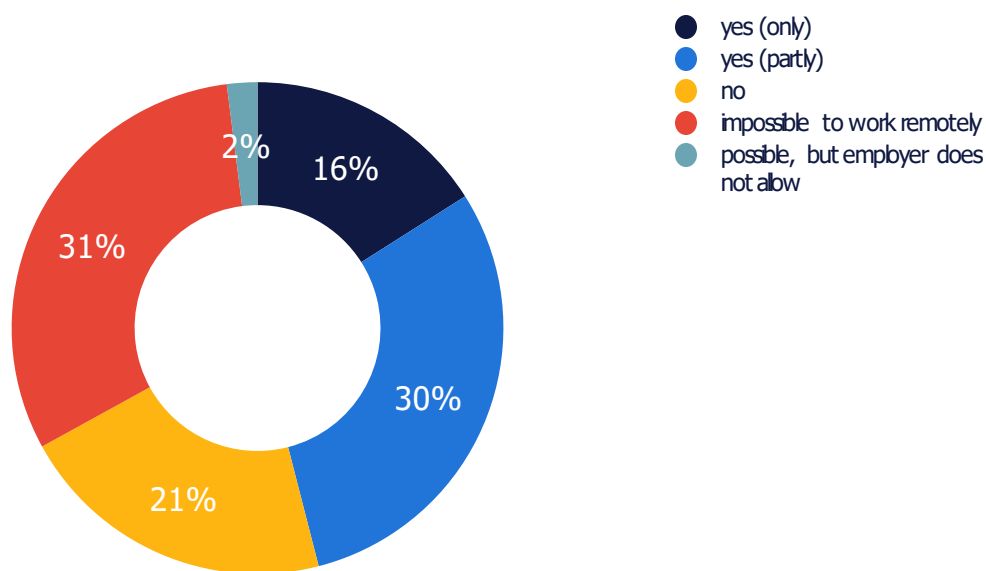
almost half of the employees (46%) started to work (more) remotely during the COVID-19 pandemic

Out of the 46% employees who started working more remotely, 58% were involved in the decision to work remotely, whereas 2 in 5 employees working remotely had no choice in the decision to do so. Men, those aged 35 and older and the higher-educated continued to work normally more often than other groups, especially in contrast to female and young workers (ages 18 to 24).



remote working due to COVID-19.

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



russia

25%

of the employees who said they worked remotely, do so out of their own decision.

Youngsters (18 to 24 years old) had more influence on the decision to work more remotely (69%) and so did men (60%). However, it can be seen that it is primarily the female and younger (18-24) employees that started working more remotely.

Only 2% of employees who can work from home are not allowed to do so by their employer. However, 31% of the workers have jobs in which it is impossible to work from home or elsewhere. This is less true for the younger (18-24) employees (21%).

cis

26%

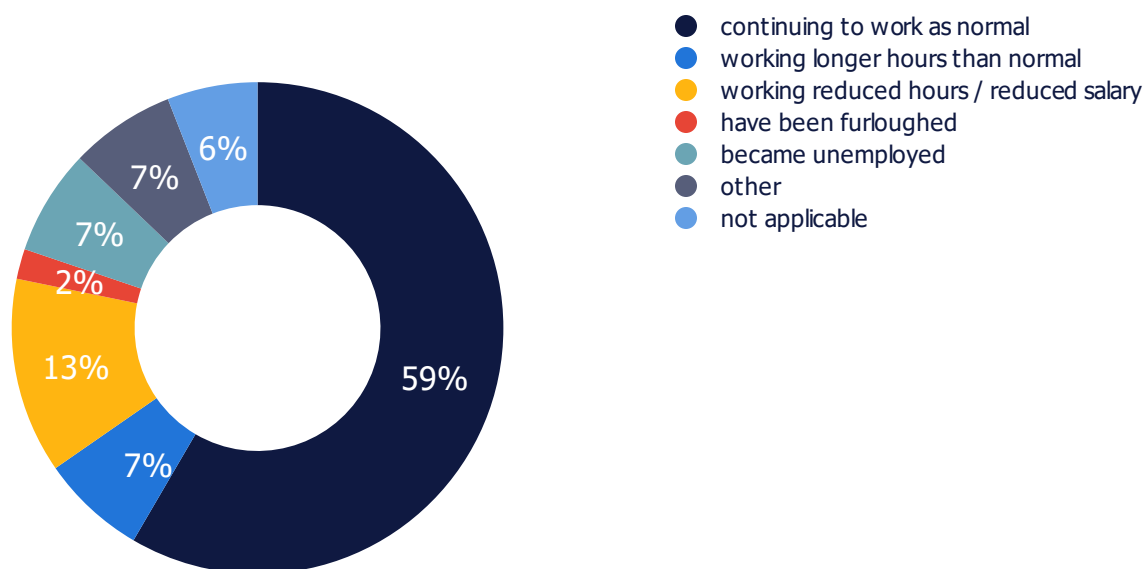
of the employees who said they worked remotely, do so out of their own decision.

When looking across the region, those aged 18 to 24, men and the middle educated in the CIS were most likely to have started working more remotely out of their own decision (39%, 28% and 39% respectively).

Comparably, in CIS only 3% of employees who can work from home are not allowed to do so by their employer. However, 30% of the workers have jobs in which it is impossible to work from home or elsewhere. This is less true for the younger (18-24) and the higher-educated employees (23%, respectively).

employment situation changes due to COVID-19.

how COVID-19 changed one's employment situation



nearly four out of ten employees saw their employment situation change

36% 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.

Women and those aged 18 to 24 (8%, respectively) were more likely to become unemployed due to COVID-19.

Most of the workforce, however, continued to work as normal. Men were more likely to do so (64%) than women were (54%).

cis

36%

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

job loss fear in 2021 intention to switch.

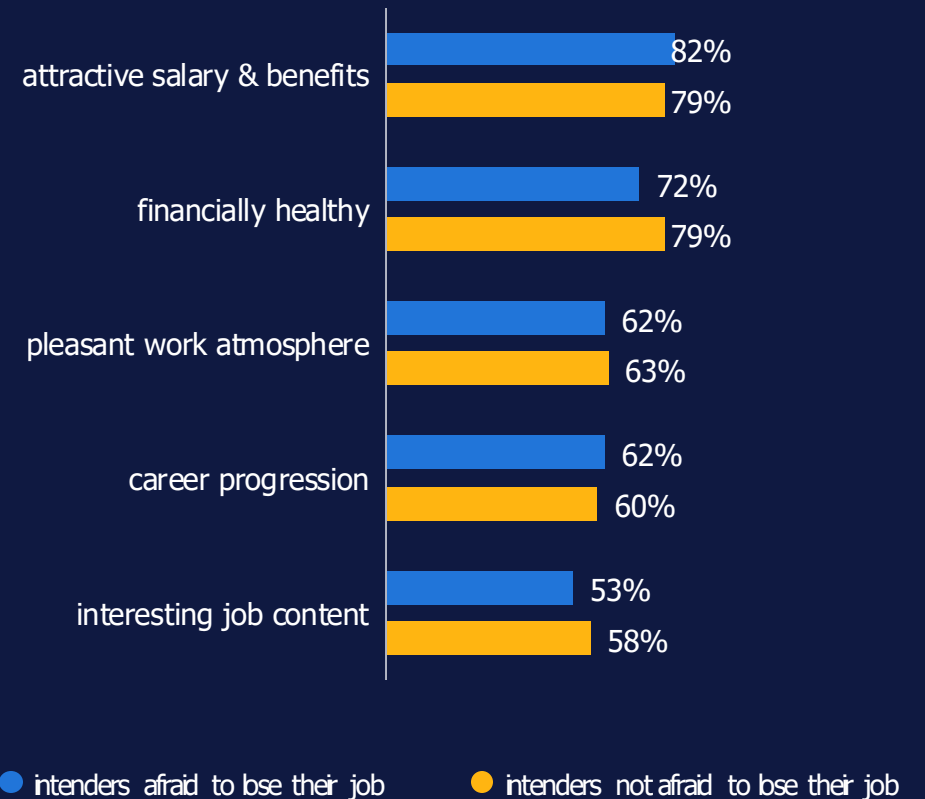
31%

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

14%

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

most important attributes



intention to switch amongst those affected by COVID-19.

intenders

2021

25%

plan to change employer in the
next 6 months.

intenders

2021

39%

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 (39%) than those who just intend to change employers (25%).

The way Russian employers have supported their workforce and handled the pandemic has had a limited impact on loyalty among employees: 20% of employees now feel more loyal with a higher proportion (34%) feeling less loyal to their employer. One in three employees were neutral about this statement. The impact on loyalty is irrespective of gender, but for younger employees (34 years old and younger) loyalty was more likely to increase when compared to older employees. Having been obliged to work from home does not have an impact on loyalty, but men who could make the decision to work from home recorded an increased loyalty.



job loss fear in 2021 due to COVID-19.

considerable fear of losing job

Although there is a large proportion not afraid of losing their job (39%), a substantial number of people do fear that this will happen in 2021 (33%). Women are more worried than men (35% vs. 32%), which is in line with the fact that they were already more likely than men to have become unemployed in the past year. We also see a greater fear of job loss amongst older employees even though they were more likely to have continued to work as normal during the pandemic.

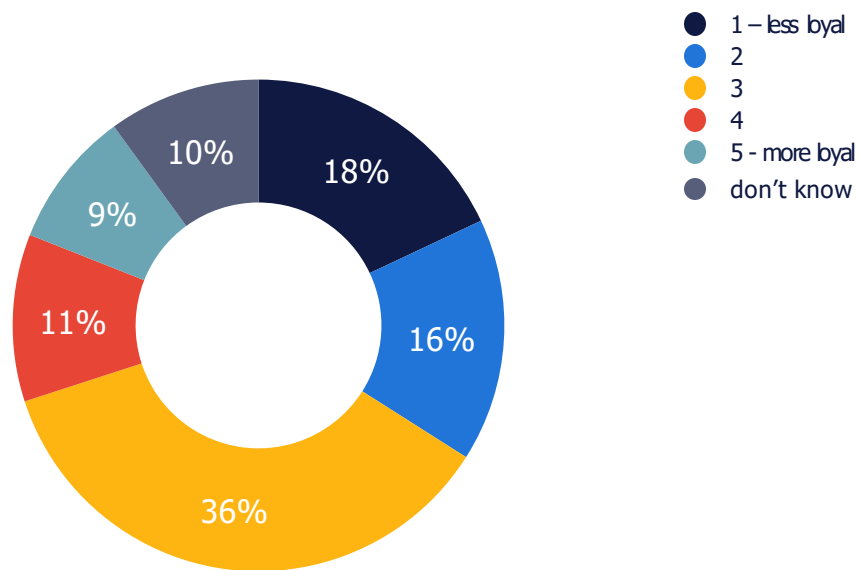
less fear of losing job in certain regions

Employees in the Northwestern Federal District are slightly less worried about losing their job in 2021. That also counts for the Ural, Siberian and Far Eastern Federal District. In the largest regions, Moscow and Volga Federal district, fear of losing the job is slightly higher than the average.



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

21% 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

19% 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

21% 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

23% 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.

appendix 1

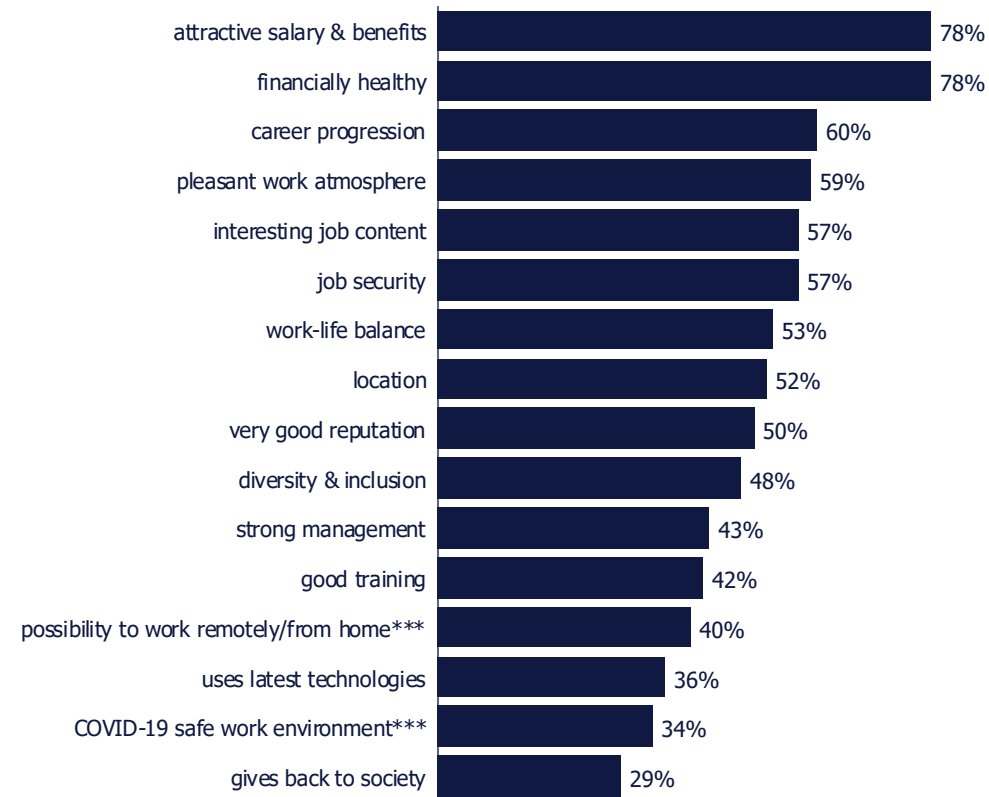
deep dive EVP drivers.



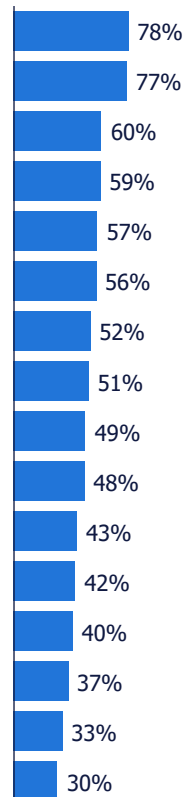
what potential employees want

the most important criteria when choosing an employer.

important criteria



cis
2021



russia
2020



russia
2019

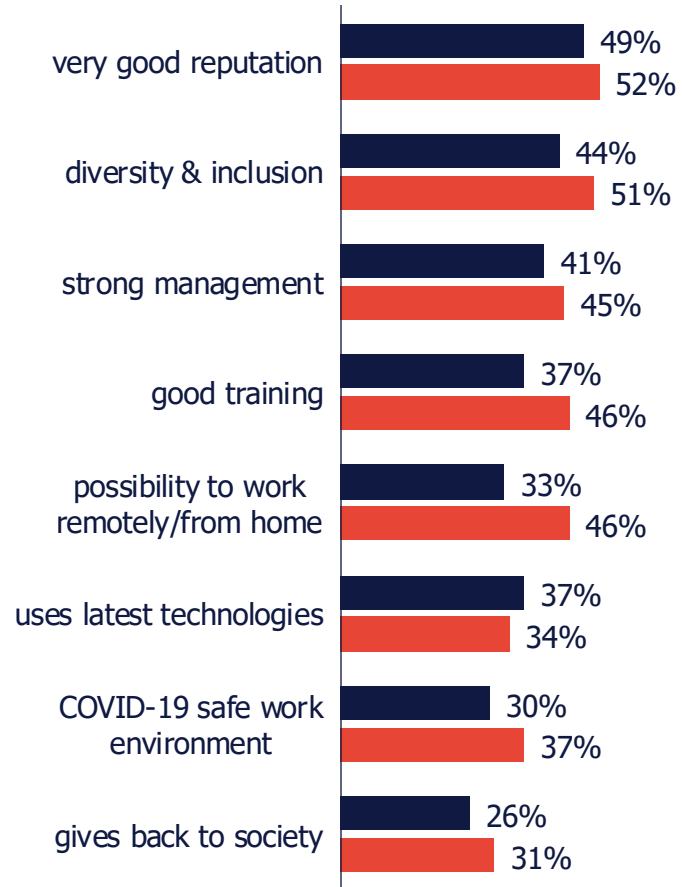
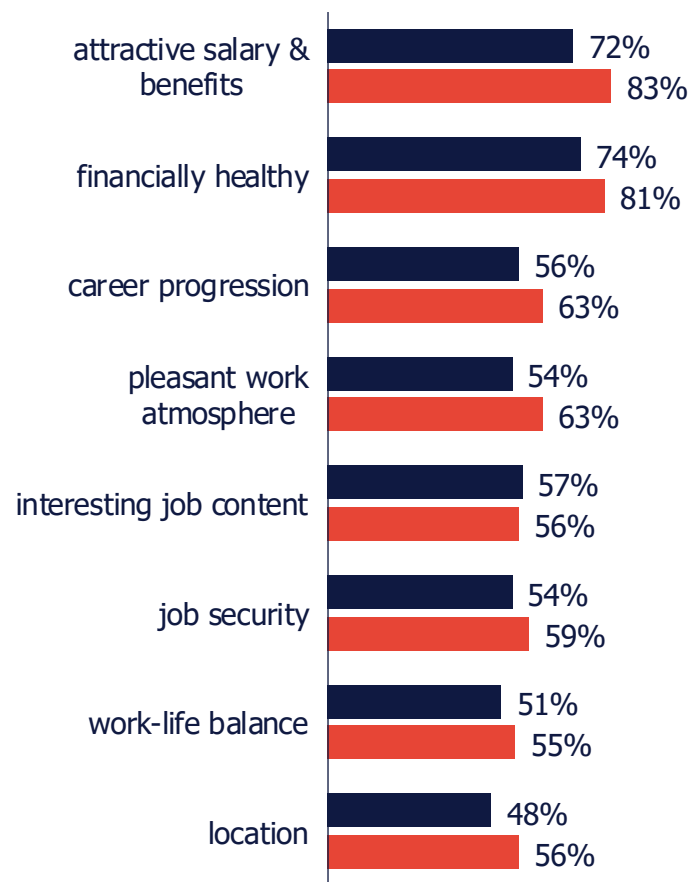


* when comparing 2021 with previous years, please note that this question has been altered in that respondents are now free to choose as many drivers as they considered important from a list of 16 drivers whilst in previous years they were forced to pick exactly 5 out of these 16.

***only researched in 2021 / interrupted in 2021

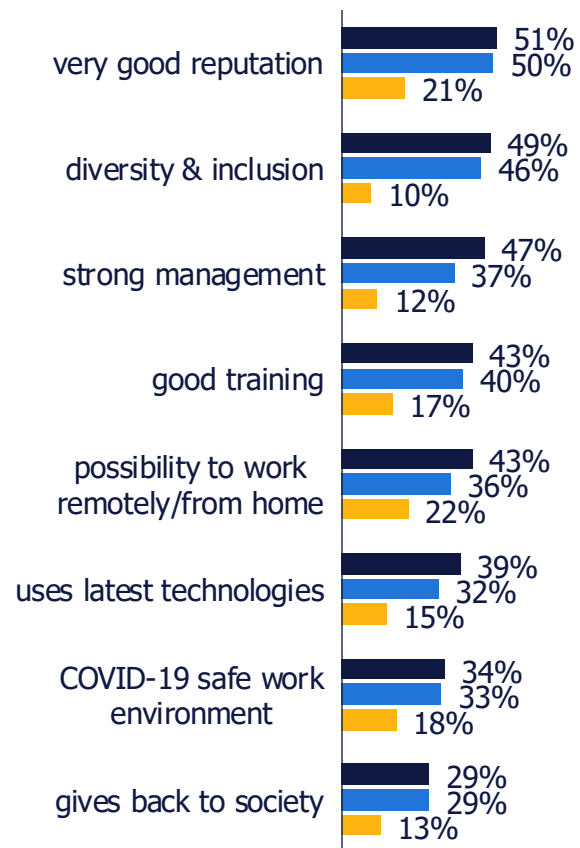
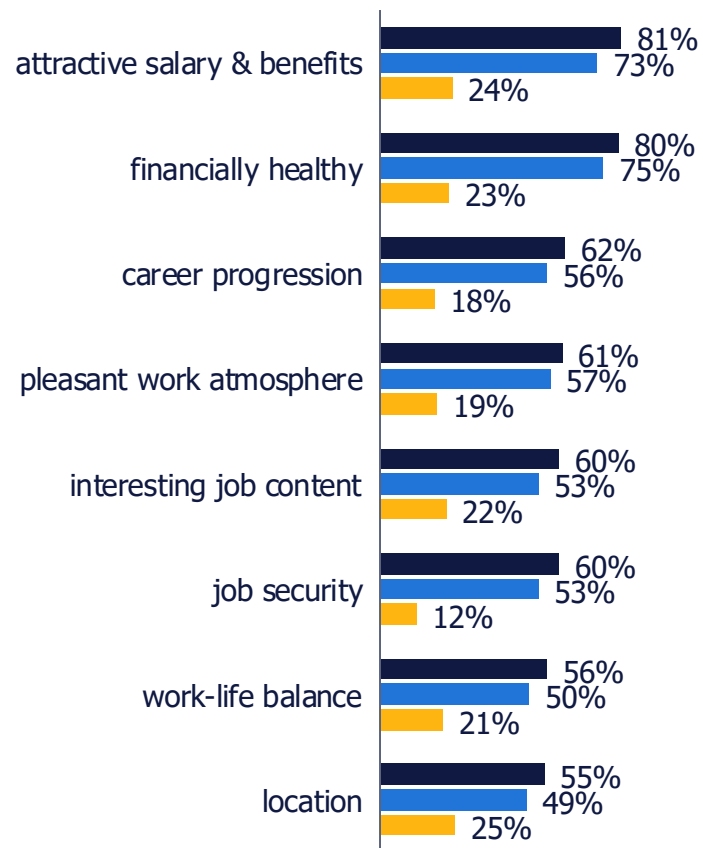


EVP driver importance by gender.



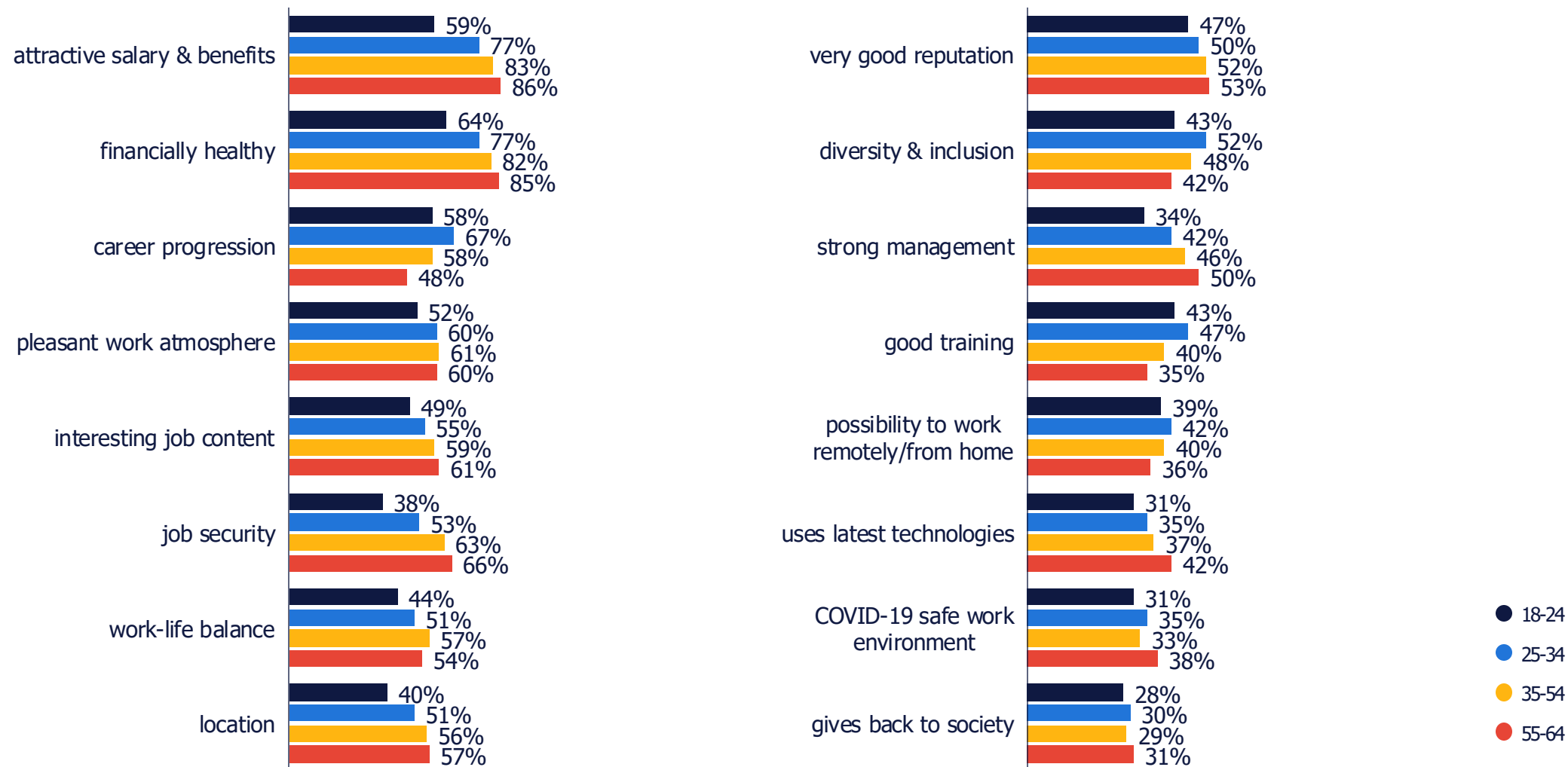
● male
● female

EVP driver importance by education.



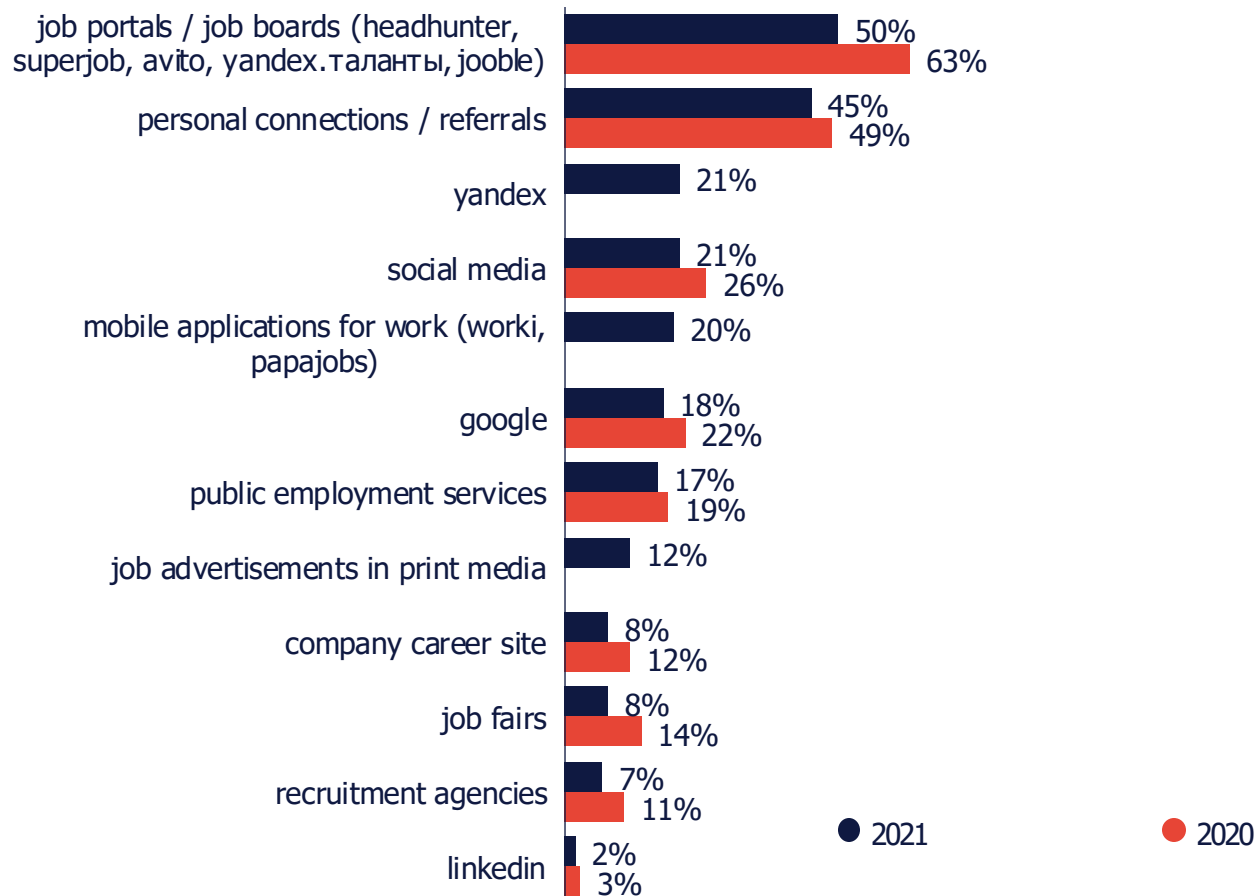
● higher
● middle
● lower

EVP driver importance by age.

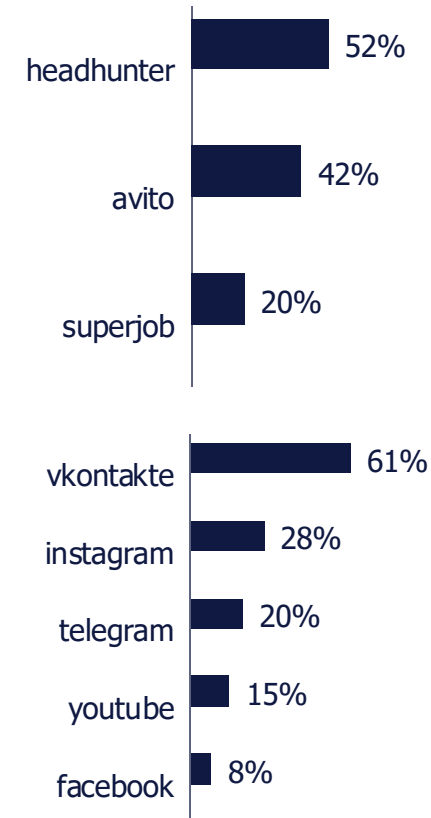


how do employees in russia find new job opportunities.

channels used to find new job opportunities



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



appendix 2



deep dive
employers.

perception of employer offer in russia.

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

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

general perception of employers in russia

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

profile of ideal employer

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

perception of employer offer in russia and the region.

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



employers in russia are perceived to offer

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

employers in cis are perceived to offer

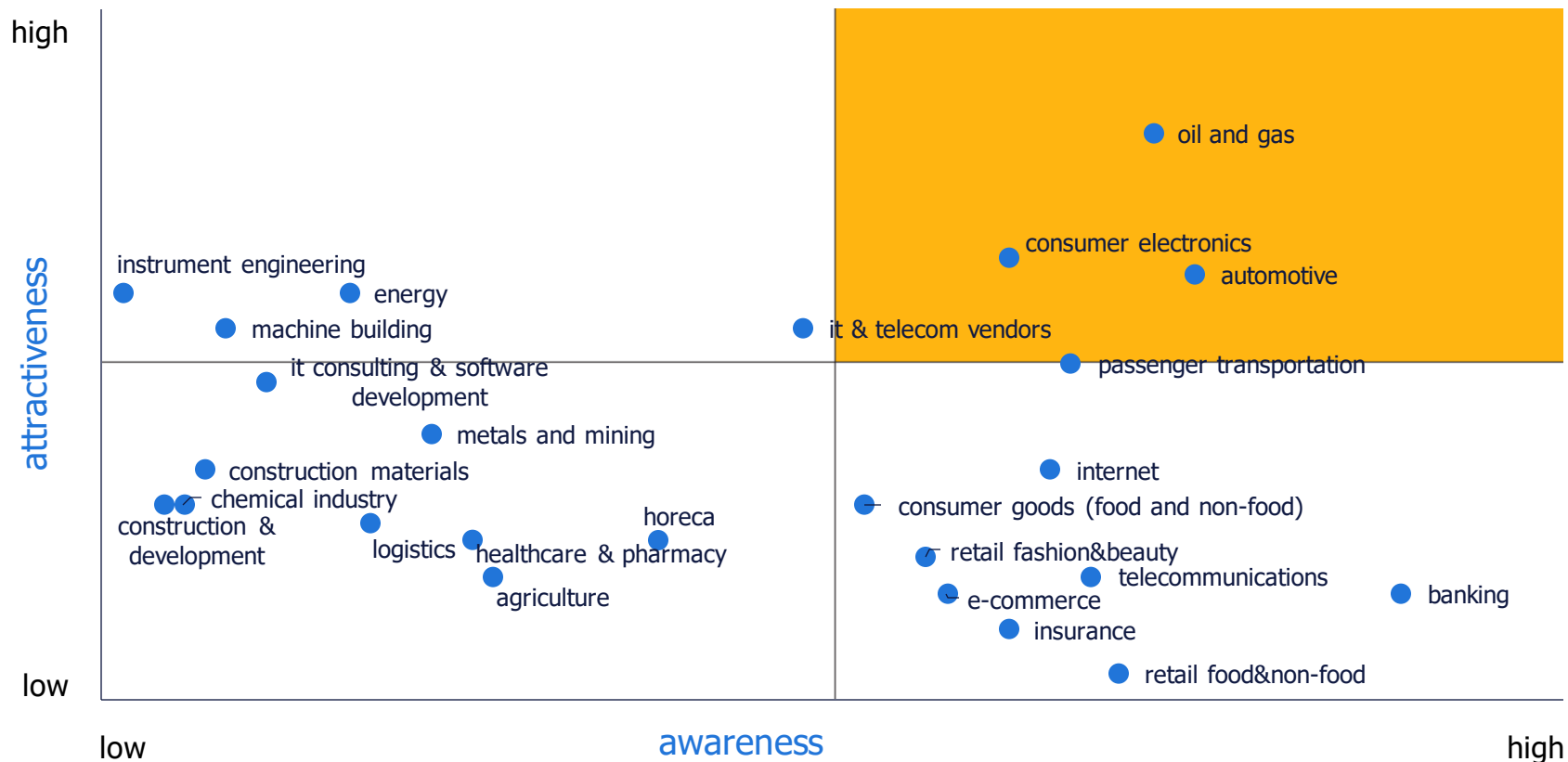
- 01 financially healthy
- 02 very good reputation
- 03 job security
- 04 COVID-19 safe work environment
- 05 attractive salary & benefits
- 06 career progression
- 07 pleasant work atmosphere
- 08 work-life balance
- 09 gives back to society
- 10 possibility to work remotely/from home

sector

insights.



top performing sectors in russia 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.

russia's best performing companies by sector (1).

top 5 companies

| | | | | | |
|--------------------------------------|-----------------------------|--------------------|---------------------------------|---|------------------|
| oil and gas | Gazprom | Rosneft | Transneft | Surgutneftegas | Russneft |
| consumer electronics | Samsung | Apple | Sony | LG Electronics | Philips |
| automotive | Mercedes-Benz | BMW | Volkswagen | Nissan | Volvo Group |
| instrument engineering | Schneider Electric | JSC Ruselectronics | Siemens | United Instrument Manufacturing Corporation | Honeywell |
| energy | EuroSibEnerg | Rosatom | Inter RAO | Siberian Generating Company | RusHydro |
| machine building | Almaz-Antey | Roscosmos | United Shipbuilding Corporation | Russian Machines | TecMash |
| IT & telecom vendors | Huawei | DELL Technologies | HP | Nokia | Fujitsu |
| passenger transportation | Aeroflot - Russian Airlines | S7 | Novoport | Sheremetyevo International Airport | Russian Railways |
| IT consulting & software development | Microsoft | IBM | CFT | SAP | Kaspersky Lab |
| metals and mining | Norilsk Nickel | Alrosa | Novolipetsk Steel (NLMK) | Rusal | TMC |

russia's best performing companies by sector (2).

| | top 5 companies | | | | |
|----------------------------|----------------------|------------------------|------------------|-----------------------------|------------------------------|
| internet | Yandex | Mail.ru | Rambler&Co | 2GIS | Skyeng |
| construction materials | Cersanit | Knauf | Technonikol | Rockwool | Rehau |
| consumer goods (food) | Nestle | Mars | Maxxium | FERRERO | Bacardi |
| consumer goods (non-food) | Procter & Gamble | L'Oréal | SC Johnson | Philip Morris International | Unilever |
| chemical industry | Sibur | Nizhnekamskneftekhim | Uralchem | Kazanorgsintez | Eurochem |
| construction & development | Glavstroy | FSK Group of Companies | Etalon Group | Samolet Development | Crocus Group |
| logistics | Maersk | FM Logistic | Major | FESCO | TNT Express |
| healthcare & pharmacy | AstraZeneca | Johnson & Johnson | Bayer | Vertex | Roche |
| horeca | Accor Live Limitless | Marriott International | Hilton Worldwide | Radisson Hotel Group | InterContinental Hotel Group |
| retail fashion&beauty | adidas | Bosco di Ciliegi | Zolotoye Yabloko | Jamilco | H&M |

russia's best performing companies by sector (3).

top 5 companies

| | | | | | |
|----------------------|------------------------|--------------------------------|---------------|---|-----------------------|
| agriculture | SibAgro | Agrokomplex n.a. N. Tkachev | Rusagro | EFKO Group | Agropromkomplektaciya |
| telecommunications | RTRS | Transtelecom | KOMKOR | ER Telecom | Rostelecom |
| banking | Gasprombank | Central Bank Russia | VTB | Sberbank | Alfa Bank |
| e-commerce | Ozon | Wildberries | Otto Group | Lamoda | 220 Volt |
| insurance | SOGAZ | Alfa Strakhovanie | Reso Garantia | STRAHOVOE AKTCIONERNOE OBSHCHESTVO "VSK" | Ingosstrakh |
| retail food&non-food | Inventive Retail Group | IKEA | Aromatny Mir | DNS | Leroy Merlin |

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

1/3

| | top 3 EVP drivers | | |
|---|----------------------|------------------------------|--------------------------------|
| sector | 1 | 2 | 3 |
| 01 oil and gas | financially healthy | attractive salary & benefits | very good reputation |
| 02 consumer electronics | very good reputation | financially healthy | attractive salary & benefits |
| 03 automotive | very good reputation | financially healthy | attractive salary & benefits |
| 04 instrument engineering | very good reputation | financially healthy | job security |
| 05 energy | financially healthy | job security | attractive salary & benefits |
| 06 machine building | financially healthy | very good reputation | job security |
| 07 it & telecom vendors | very good reputation | financially healthy | attractive salary & benefits |
| 08 passenger transportation | financially healthy | very good reputation | attractive salary & benefits |
| 09 it consulting & software development | very good reputation | financially healthy | COVID-19 safe work environment |
| 10 metals and mining | financially healthy | job security | very good reputation |

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

2/3

| sector | top 3 EVP drivers | | |
|---------------------------------------|--------------------------------|--|--------------------------------|
| | 1 | 2 | 3 |
| 11 internet | COVID-19 safe work environment | possibility to work remotely/from home | very good reputation |
| 12 construction materials | very good reputation | financially healthy | COVID-19 safe work environment |
| 13 consumer goods (food and non-food) | financially healthy | very good reputation | job security |
| 14 chemical industry | financially healthy | very good reputation | job security |
| 15 construction & development | financially healthy | very good reputation | COVID-19 safe work environment |
| 16 logistics | financially healthy | very good reputation | COVID-19 safe work environment |
| 17 healthcare & pharmacy | financially healthy | very good reputation | COVID-19 safe work environment |
| 18 horeca | financially healthy | very good reputation | COVID-19 safe work environment |
| 19 retail fashion&beauty | very good reputation | financially healthy | COVID-19 safe work environment |
| 20 agriculture | financially healthy | very good reputation | COVID-19 safe work environment |

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

3/3

| | top 3 EVP drivers | | |
|-------------------------|----------------------|--------------------------------|--------------------------------|
| sector | 1 | 2 | 3 |
| 21 telecommunications | financially healthy | COVID-19 safe work environment | very good reputation |
| 22 banking | financially healthy | COVID-19 safe work environment | very good reputation |
| 23 e-commerce | very good reputation | COVID-19 safe work environment | financially healthy |
| 24 insurance | financially healthy | COVID-19 safe work environment | very good reputation |
| 25 retail food&non-food | financially healthy | very good reputation | COVID-19 safe work environment |

top



employers.

top employers to work for in Russia (amongst the 150 largest throughout industries).

top 10 employers 2021

- 01 Gazprom
- 02 Rosneft
- 03 Transneft
- 04 Almaz-Antey
- 05 Surgutneftegas
- 06 JSC Ruselectronics
- 07 EuroSibEnergo
- 08 Yandex
- 09 Rosatom
- 10 Russneft

top 10 employers 2020

- 01 Gazprom
- 02 Gazprom neft*
- 03 Rosneft
- 04 Transneft
- 05 Surgutneftegas
- 06 Rosatom
- 07 Yandex
- 08 Lukoil
- 09 Novaport
- 10 Russneft

* Having consistently won for three years entered the Randstad international Hall of Fame and is not rated for 3 years

russia's top 3 EVP drivers of the top 5 companies (amongst the 150 largest throughout industries).

| top 5 companies | 1 | 2 | 3 |
|------------------|---------------------|------------------------------|----------------------|
| 1 Gazprom | financially healthy | attractive salary & benefits | very good reputation |
| 2 Rosneft | financially healthy | attractive salary & benefits | job security |
| 3 Transneft | financially healthy | attractive salary & benefits | job security |
| 4 Almaz-Antey | financially healthy | very good reputation | job security |
| 5 Surgutneftegas | financially healthy | attractive salary & benefits | job security |

russia's top employers (amongst the 150 largest throughout industries) by EVP driver.

| EVP driver | 1 | 2 | 3 |
|--|-------------|--------------------|--|
| attractive salary & benefits | Gazprom | Surgutneftegas | Rosatom |
| financially healthy | Gazprom | Surgutneftegas | Rosneft |
| career progression | Gazprom | EuroSibEnerg | JSC Ruselectronics |
| pleasant work atmosphere | Yandex | JSC Ruselectronics | adidas CIS |
| job security | Gazprom | JSC Ruselectronics | Rosneft |
| work-life balance | Yandex | JSC Ruselectronics | FM logistic |
| very good reputation | adidas CIS | Gazprom | Yandex |
| possibility to work remotely/from home | Yandex | Tinkoff Bank | Ozon |
| COVID-19 safe work environment | FM logistic | Yandex | The Central Bank of the Russian Federation |
| gives back to society | Yandex | JSC Ruselectronics | IBS |

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.

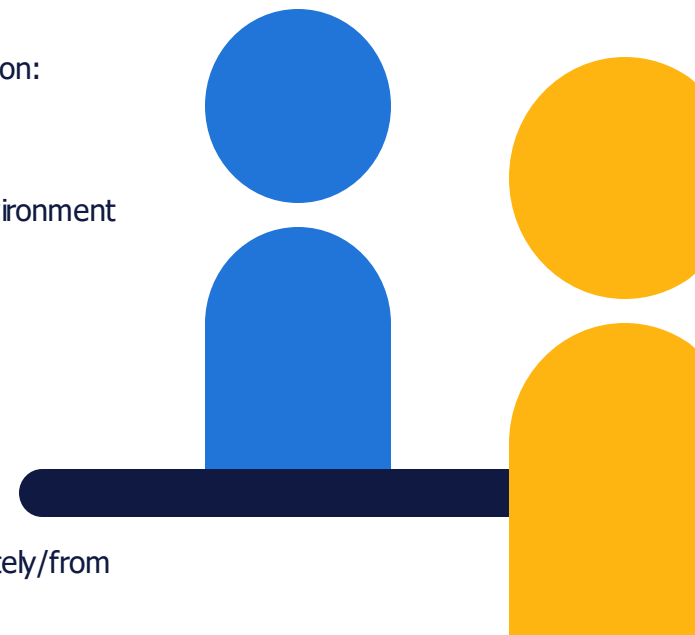
In order to make sure that the less well known brands are assessed by a sufficient number of respondents, we make use of a smart sampling method.

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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