

Randstad Employer Brand Research report 2017

global employee
insights into the
perception of
the IT sector

Employer Brand
Research 2017
powered by  randstad



table of contents



introduction



what is the Randstad Employer Brand Research?

The most representative, and inclusive, employer brand research in the world, capturing the opinion of the general public between 18 and 65

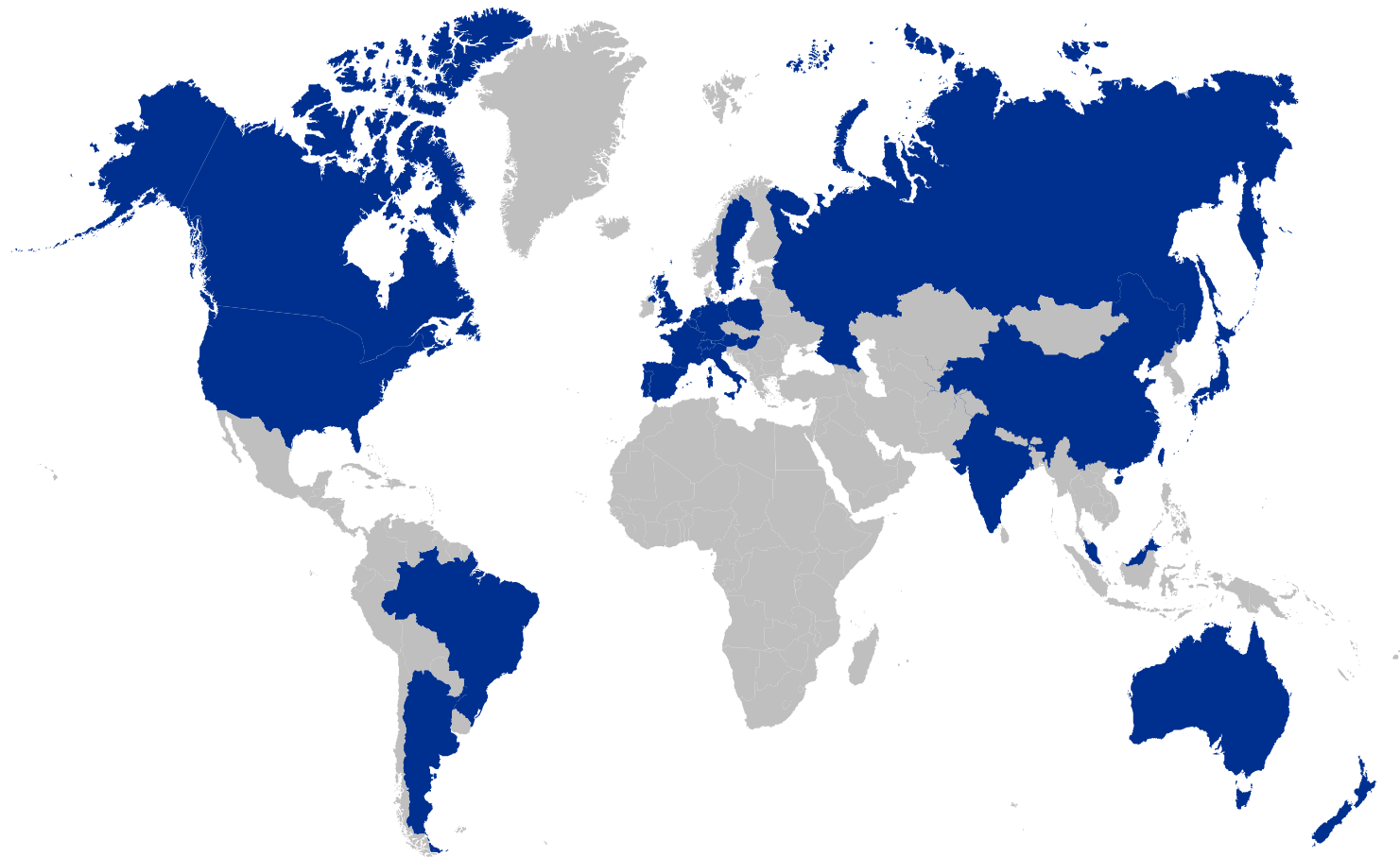
Founded in 2000 as the Randstad Award, moving forward in 2017 as Randstad Employer Brand Research, optimizing 17 years of successful employer branding insights

Independently conducted research, giving a truly impartial view of the employee market and a reflection of employer attractiveness for each of the 26 participating countries' largest employers

Valuable insights to help companies shape their employer brand

Information on automation, retraining and sector switching included

26 countries surveyed covering 75% of the global economy



Australia Argentina Belgium Brazil Canada China France Germany Hong Kong
Hungary Italy India Japan Luxembourg Malaysia New Zealand Netherlands
Poland Portugal Russia Singapore Spain Sweden Switzerland UK USA

Worldwide:
Over 160,000 respondents
5,495 companies surveyed

Sample aged 18 to 65,
representative on gender
with an overrepresentation
on age group 25 – 44

Sample comprised of
students, employed and
unemployed workforce

Online interviews conducted
in November and December
2016

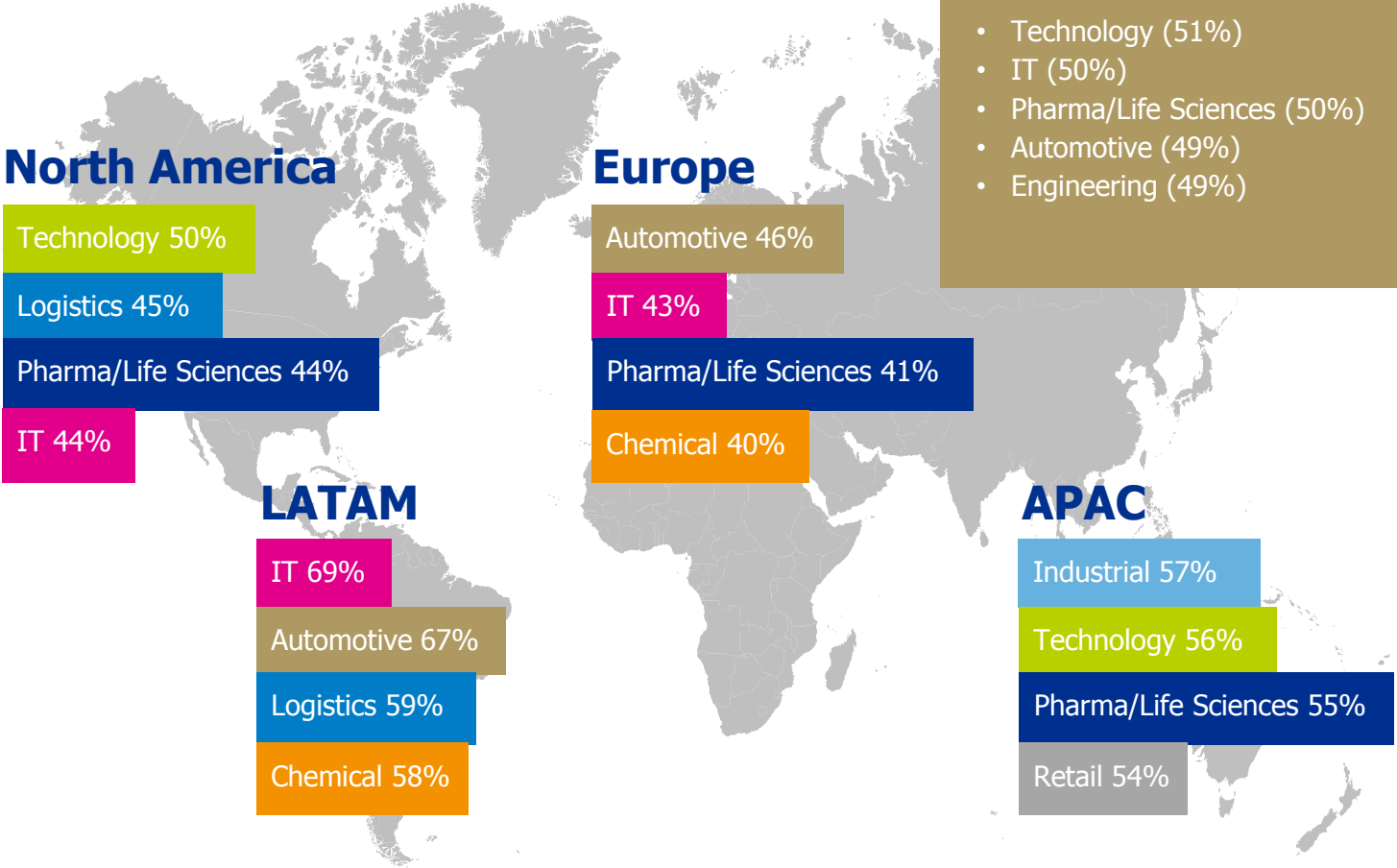
Length of interview:
16 minutes

global insights

How does the IT sector compare to others in terms of attractiveness? Where does it need to improve perception to increase its appeal? Plus a spotlight on some regional differences around specific attributions.

IT is one of the most appealing sectors globally, but other sectors top most regional rankings

most attractive sector to work in by region



Technology has overtaken IT as the number one most attractive sector this year, although the difference between the two sectors is minimal. The difference between the top 5 sectors is minor with number five (Engineering) being found attractive by 49% and number one (Technology) being found attractive by 51%

Overall the IT sector ranks as the 2nd most attractive sector to work in globally. This represents a huge potential pool of talent to draw on.

Viewed regionally, however, other sectors like Automotive and Technology vie for top spot. The IT sector performs most strongly in LATAM and Europe.

Given the growing demand for skilled IT workers there is no room for complacency if a company wants to continue to compete for the best talent, particularly against Technology, Pharma/Life Sciences, and Automotive.

The popular sectors in 2017 are equal to those in previous years apart from Technology, which has risen in attractiveness, and Logistics now coming up the ranks in North America and LATAM.

most attractive employer attributes are not the same as the perceptions of the largest IT sector companies

most important attributes in future employer for IT employees (% agree)

1. **Attractive salary and benefits (57%)**
2. **Good work-life balance (49%)**
3. **Long-term job security (46%)**
4. Career progression opportunities (41%)
5. Pleasant work atmosphere (37%)
6. Financially healthy (36%)
7. Flexible working arrangements (30%)
8. Strong management / leadership (27%)
9. Good training (26%)
10. Conveniently located (24%)

core values attributed to largest IT companies (% agree)

1. Uses latest technologies available (64%)
2. Financially healthy (61%)
3. Good reputation (55%)
4. Work is stimulating and challenging (51%)
5. Career progression opportunities (51%)
6. **Long-term job security (49%)**
7. Pleasant work atmosphere (47%)
8. **Good work-life balance (43%)**
9. Cares for the environment / gives back to society (41%)
10. Will face challenges in the next decade (22%)

- The most attractive employer attributes for IT workers – attractive salary, job security – are predictable, if not always easy for companies to deliver.
- When data on core values of large companies is compared to attractive attributes in a new employer, this highlights some areas for improvement. A good work-life balance and a pleasant work atmosphere will be key to attracting the best and most engaged IT employees:
 - Compared to last year's IT Sector report we see that work-life balance has moved up from 3rd place to 2nd which is indicative of a rising trend of pressured life styles, with people suffering stress as they try to 'have it all': be active parents, have a good job and be healthy
 - A pleasant work atmosphere has maintained its position in the top 5 attributes. Where possible employers should actively highlight this as part of their recruitment efforts.
- In line with last year's report, long-term job security remains in the top 3 most important attributes of an employer, highlighting the reassurance and stability that many employees seek:
 - As economies continue to be impacted by events like Brexit and new trade agreements, it will be helpful if companies can calm fears and decrease the feelings of risk that potential new employees might feel.
- And although the majority of respondents feel that the largest companies use the latest technologies available, when it comes to the importance of a future employer having the latest tech, respondents don't even rank it within the top 10. This could be because employees expect their employers to have up-to-date technology and so it is a necessity and not an individual employee advantage that benefits them on a personal level.

Base: REBR study 2017, All employees who work in an IT capacity

career progression opportunities much more important to IT employees on average

most important attributes in future employer for IT employees (% agree)

1. Attractive salary and benefits (57%)
2. Good work-life balance (49%)
3. Long-term job security (46%)
4. Career progression opportunities (41%)
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6. Financially healthy (36%)
7. Flexible working arrangements (30%)
8. Strong management / leadership (27%)
9. Good training (26%)
10. Conveniently located (24%)

important attributes in future employer for all respondents (% agree)

1. Attractive salary and benefits (58%)
2. Long-term job security (46%)
3. Good work-life balance (45%)
4. Pleasant work atmosphere (43%)
5. Career progression opportunities (35%)
6. Financially healthy (33%)
7. Flexible working arrangements (31%)
8. Good training (28%)
9. Conveniently located (27%)
10. Strong management / leadership (26%)

- While employer values sought are similar among IT and non IT employees, how they rank differs.
- IT employees rate career progression opportunities as significantly more important when looking at a potential employer, which is consistent with 2016's findings.
- Among the general population, a pleasant work atmosphere ranks higher (4th in the ranking for all respondents vs. 5th for IT employees).
- 74% of recent graduates would choose to work at an organisation with an engaging positive social atmosphere even it means accepting a lower salary.¹
- The lower ranking for work atmosphere could reflect the male bias in the IT sector. Globally, a higher percentage of women both within the IT sector as well as generally, rank a pleasant work atmosphere as key for an employer. Increasing diversity in this sector could help change the work atmosphere.⁶
- In comparison to last year's findings, strong management/leadership has increased in importance for IT employees ranking 8th this year versus 11th last year. This sector values a strong figurehead.

Base: REBR study 2017, all aged 18-65/All employees who work in an IT capacity

most attractive attributes centre on making employees feel stable and secure while least attractive attributes involve taking risks

most important attributes in potential employer for IT employees (% agree)

1. Attractive salary and benefits (58%)
2. Long-term job security (46%)
3. Good work-life balance (45%)
4. Pleasant work atmosphere (43%)
5. Career progression opportunities (35%)
6. Financially healthy (33%)
7. Flexible working arrangements (31%)
8. Good training (28%)
9. Conveniently located (27%)
10. Strong management / leadership (26%)

least important attributes in potential employer for IT employees (% agree)

1. International career opportunities (55%)
2. Entrepreneurial way of working (46%)
3. Uses latest technologies available (42%)
4. Conveniently located (33%)
5. Promotes diversity and inclusion in the workplace (33%)
6. Cares for the environment / gives back to society (32%)
7. Flexible working arrangements (25%)
8. Good reputation (25%)
9. Work is stimulating & challenging (25%)
10. Offers quality products / services I value (24%)

- For the second year in a row in the REBR research, IT employees ranked salary and benefits, job security and a good work-life balance in their top three attributes of a potential employer, with good work-life balance moving up to 2nd place in the ranking in 2017.
- This year we also asked respondents what were the least important attributes in a future employer. Those which would involve taking risks featured among the most unattractive:
 - Interestingly, the least attractive attribute - international career opportunities – is one often presented as an advantage by IT and Tech employers in particular. Over half of IT employees found this to be unimportant. This is probably because international opportunities involve financial costs and moving one's family or being separated from them, something not everyone is willing to undertake.
 - Disruptor businesses like Google and Facebook are typically commended for novel working strategies. Yet an entrepreneurial way of working is one of the least attractive values in an employer for IT staff. As with international career opportunities, entrepreneurial ways of working could be viewed as risky or challenging – particularly in the current environment where long-term job security is much sought after.

Base: REBR study 2017, All employees who work in an IT capacity

large companies need to work harder to attract candidates

all respondents

- Just 26% of all respondents surveyed would want to work for a large corporation.
- Large companies are more appealing among younger people: 27% of 18-34 year olds would like to work for a large company versus only 20% of 45-65 year olds.
- There are strong differences regionally. Young people in LATAM and APAC are the most interested in working for a larger company with 38% of 18-24 year olds agreeing versus only 20% of young millennials who wish to work for a large company in North America.

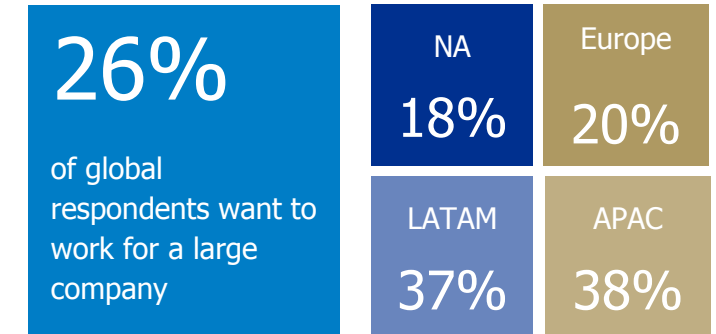
IT professionals

- Within the IT sector the figure who would prefer to work for a large company rises significantly to 38% globally, rising to 43% in LATAM and 47% in the APAC region.
- Randstad has seen a propensity among skilled IT workers to seek opportunities at smaller start-ups or 'cool' companies like Facebook and Snapchat rather than traditional technology companies such as SAP or Oracle.²
- To counter this some IT companies like Samsung are beginning to act like start-ups to attract new talent. Their goal is to "execute as quickly as a startup company and push towards open communication and continuously innovate."³

Base: REBR study 2017, all aged 18-65/All employees who work in an IT capacity

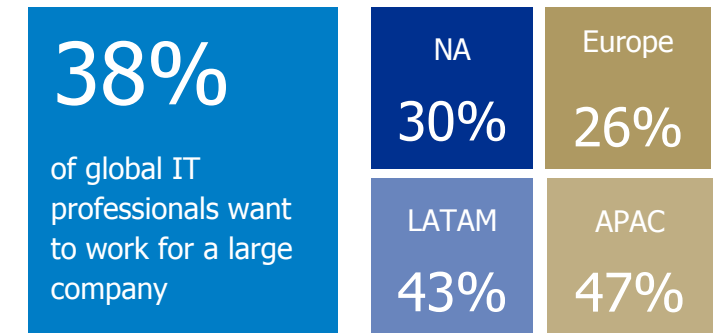
all

want to work for a large company



IT professionals

want to work for a large company



what do workers want?

Focused on career progression, gender and sector switching – areas where the IT sector has some perception issues or are a direct threat to their attractiveness as employer.

salary and benefits are key for IT employees across all age groups globally

- Across all age groups, an attractive salary and benefits tops the ranking of desired employer attributes among IT workers. This has proved to be consistent and was also ranked number 1 in 2016. Financial concerns grow stronger with age, perhaps reflecting the level of financial commitment and responsibility.
- Career progression opportunities are more important to the 18-24 and 25-44 age groups than 45-65 year olds while long-term job security is more important to the older age group, placed at 2nd in the ranking. Older workers may be more likely to be at the peak of their career so progression opportunities are less of an objective. Conversely, they may have settled at a comfortable level and prefer to focus on other aspects of life, like family or outside interests.
- While a pleasant work atmosphere matters to every age group, it is particularly important for millennials, who rate it as the third most important factor, compared to a fifth place ranking by 25-44 year olds and 45-65 year olds. Millennials place a lot of emphasis on company culture and seek out positive environments in which they can collaborate and progress as well as make friends.
- For 25-44 year olds working in IT, long-term job security has fallen from second place in our 2016 survey to third place in the 2017 ranking, replaced at number two by work-life balance which has moved up from fourth place. Career progression has also moved up one rank.
- For 18-24 year olds (millennials) working in IT, long-term job security has moved from third place in 2016 to fifth place in 2017, perhaps reflecting millennials' willingness to try on different roles. Career progression has also moved up for this group to second place, reflecting their need for professional development and growth.
 - 41% of US millennials expect to be in their current job for two years or less (compared to 17% of Gen X and 10% of Boomers).⁴

top priorities ranked by age group for IT employees

global age 18-24	global age 25-44	global age 45-65	global all
1. Attractive salary and benefits (47%)	1. Attractive salary and benefits (58%)	1. Attractive salary and benefits (61%)	1. Attractive salary and benefits (57%)
2. Career progression opportunities (40%)	2. Good work-life balance (50%)	2. Long-term job security (55%)	2. Good work-life balance (49%)
3. Pleasant work atmosphere (39%)	3. Long-term job security (45%)	3. Good work-life balance (52%)	3. Long-term job security (46%)
4. Good work-life balance (38%)	4. Career progression opportunities (44%)	4. Financially healthy (44%)	4. Career progression opportunities (41%)
5. Long-term job security (35%)	5. Pleasant work atmosphere (37%)	5. Pleasant work atmosphere (38%)	1. Pleasant work atmosphere (37%)

Base: REBR study 2017, All employees who work in an IT capacity

IT professionals are more driven by career progression than the general population

percentage of total population vs. IT employees who rank 'offers career progression opportunities' in their top five most important factors when choosing a company to work for

North America

all 29%

IT 39%

18-24: 27%
25-44: 32%
45-65: 22%

18-24: 33%
25-44: 43%
45-65: 26%

Europe

all 35%

IT 37%

18-24: 43%
25-44: 36%
45-65: 28%

18-24: 49%
25-44: 38%
45-65: 30%

LATAM

all 51%

IT 53%

18-24: 53%
25-44: 52%
45-65: 49%

18-24: 57%
25-44: 54%
45-65: 50%

APAC

all 39%

IT 44%

18-24: 42%
25-44: 40%
45-65: 33%

18-24: 40%
25-44: 46%
45-65: 38%

Standard factors such as salary, security and good work-life balance dominate and are fairly uniform across the globe.

18-24 year olds working in an IT capacity in Europe and LATAM are more concerned about career progression than people from APAC and North America, ranking it 1st, compared to 4th place for APAC and 6th for North America. North Americans aged 18-24 also care more about the reputation of a company, ranking it second whereas it ranks much lower for other regions: 10th for APAC, 11th for Europe and 14th for LATAM. This could be due to the wide array of IT opportunities available in this region and the desirability of working for big names like Google and Apple.

Career progression has maintained its position (ranked 4th globally) for IT employees compared to 2016.

IT professionals are more driven by career progression than the general population, especially those in the 25-44 age group, though less so in Europe and LATAM.

Regionally the desire for career progression varies significantly - much lower in North America and strongest in LATAM.

Base: REBR study 2017, all aged 18-65/All employees who work in an IT capacity

attracting male and female talent in IT - 1

- Globally, male and female IT employees share the same five priorities, proving that gender does not determine what employees want from a potential employer.
- It is important to recognise that women are no less ambitious as men:
 - Some studies even suggest women are the more ambitious gender – 66% of women aged 18-34 rate career as high on their list of life priorities vs 59% of men.⁵
- Female IT employees in LATAM are the only group in the regions we surveyed to value career progression more highly than an attractive salary and benefits. They are also the only subgroup to rank “Work that is stimulating and challenging” in their top five priorities.
- Flexible working arrangements are more important to female IT employees in North America and Europe than men in these regions – this is likely due to family responsibilities.
 - Research by Bain & Company and Chief Executive Women found that women with flexible working arrangements were more likely to succeed and achieve promotions. This was not the case for men who felt discouraged and judged when adopting flexible work arrangements.⁶
- Women in North America strongly prefer that a future employer fosters a pleasant work atmosphere. This is understandable as several media sources have reported on the sexist workplace culture prevalent in the top IT and technology companies.⁷ The unpleasant work atmosphere at these firms could actively be discouraging women from taking jobs in IT which could be contributing to the lack of skilled workers in this sector.
- Unlike women anywhere else in the world, IT women in the APAC region deem the financial health of a company to be a top priority. This could be because this region is seeing an overall slowing down of the economy and so working for a financially stable company is increasing in importance.

attracting male and female talent in IT - 2

top priorities for IT men & women by region

North America

women <ul style="list-style-type: none">• Attractive salary and benefits• Good work-life balance• Flexible working arrangements• Pleasant work atmosphere• Long-term job security	men <ul style="list-style-type: none">• Attractive salary and benefits• Long-term job security• Good work-life balance• Career progression opportunities• Strong management/leadership
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Europe

women <ul style="list-style-type: none">• Attractive salary and benefits• Good work-life balance• Pleasant work atmosphere• Long-term job security• Flexible working arrangements	men <ul style="list-style-type: none">• Attractive salary and benefits• Good work-life balance• Long-term job security• Pleasant work atmosphere• Career progression opportunities
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global

women <ul style="list-style-type: none">• Attractive salary and benefits• Good work-life balance• Long-term job security• Career progression opportunities• Pleasant work atmosphere
men <ul style="list-style-type: none">• Attractive salary and benefits• Good work-life balance• Long-term job security• Career progression opportunities• Financially healthy

LATAM

women <ul style="list-style-type: none">• Career progression opportunities• Attractive salary and benefits• Pleasant work atmosphere• Flexible working arrangements• Work that is stimulating and challenging	men <ul style="list-style-type: none">• Attractive salary and benefits• Career progression opportunities• Pleasant work atmosphere• Flexible working arrangements• Long-term job security
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APAC

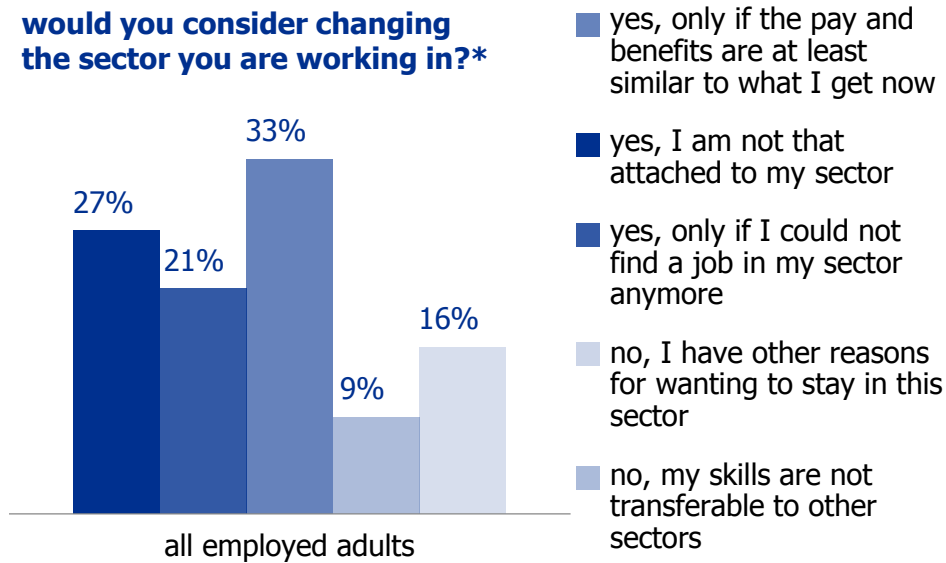
women <ul style="list-style-type: none">• Attractive salary and benefits• Good work-life balance• Career progression opportunities• Long-term job security• Financially healthy	men <ul style="list-style-type: none">• Attractive salary and benefits• Good work-life balance• Long-term job security• Career progression opportunities• Financially healthy
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Base: REBR study 2017, All employees who work in an IT capacity

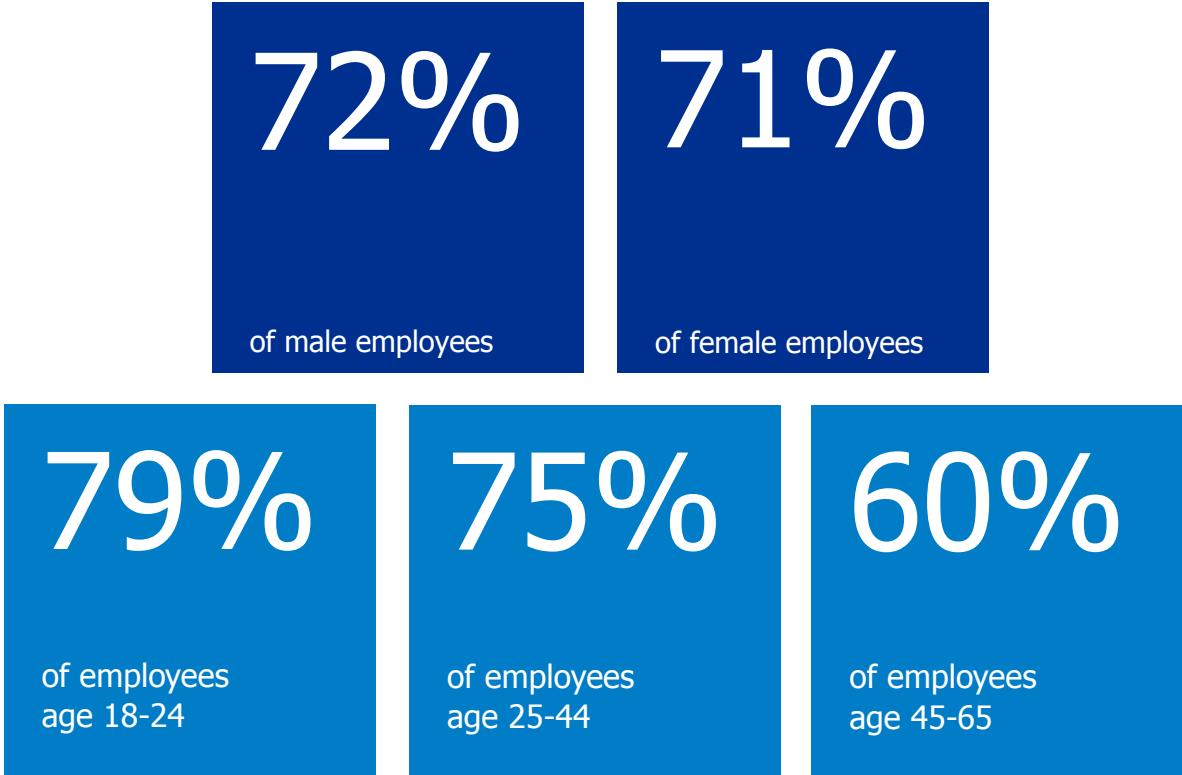
people do not expect to work in the same sector for life – switching is firmly on the agenda

- 55% of US employees and 76% of US Millennials expect to change careers, not just jobs at some point. ⁸
- Still in the US, while 74% of all workers are happy with their jobs, 66% of them are still open to new employment. ⁹
- 72% of all employees surveyed are willing to switch sector for one reason or another. As an example, 27% of all employees say they would do so because they aren't attached to their sector.

would you consider changing the sector you are working in?*



willingness to switch sectors **



Base: REBR study 2017, all aged 18-65 and are employed

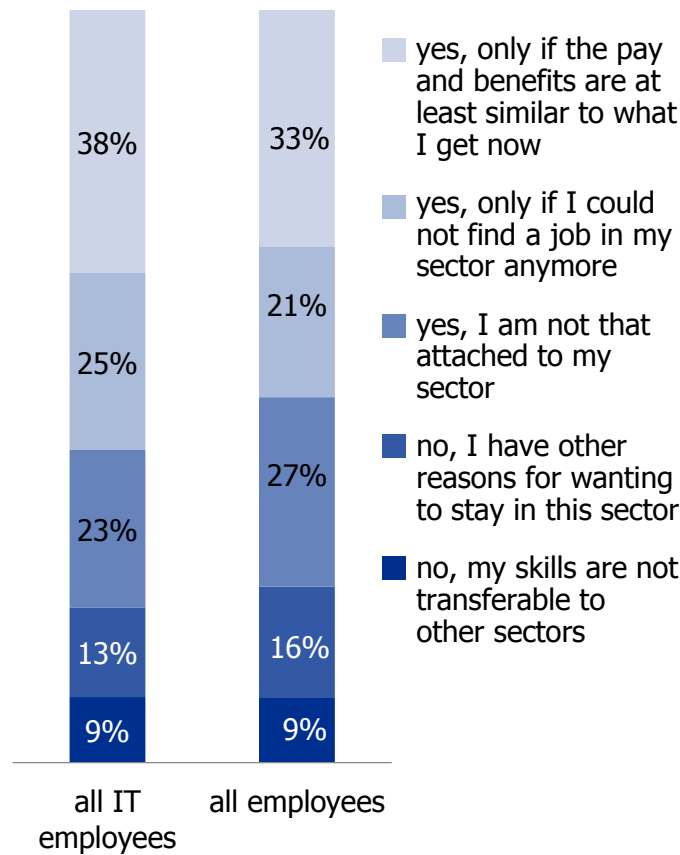
* More than one answer could be given in this question, but one could not say 'yes' and 'no'

** deduped answer: all that gave one of the 'yes' answers

willingness to switch sectors points to a real risk of 'brain drain' for the IT sector

- **There is an acknowledged lack of people with IT skills today:**
 - 78% of UK business leaders and IT execs think a shortage of IT skills is holding their firm back.¹⁰
 - 71% of employers in 10 markets are using IT contractors, likely due to a shortage of skilled staff.¹¹
- **At the same time there is a growing need:**
 - By 2024, US employment of IT professionals who manage computers and computer networks is expected to increase by 8% while employment of web developers is expected to grow by 27%.¹²
 - The UK Careers and Employability Service predicts that 518,000 additional workers for the three highest skilled occupational groups in the digital arena will be needed by 2022. This is three times more than the number of computer science graduates in the UK over the last 10 years.¹⁰
- **75% of IT employees are willing to switch sector for a variety of reasons.**
 - This is in comparison to the total working population where only 72% of respondents would be willing to switch sectors:
 - 38% of IT employees vs only 33% of all employees would consider equal or better pay and benefits to be a reason to switch
 - Other sectors may be upping their game to lure IT candidates which presents a significant challenge in retention and recruitment for IT.

would you consider changing the sector you are working in?*



willingness to switch sectors**



Base: REBR study 2017, All employees who work in an IT capacity

* More than one answer could be given in this question, but one could not say 'yes' and 'no'

** deduped answer: all that gave one of the 'yes' answers

how attractive is your sector?

How attractive is the IT sector compared to other sectors, how are some of the most iconic technology companies competing for talent, and how are global trends forcing companies to look at other ways of mitigating these shortages?



IT is attractive globally but faces stiff competition from other sectors within each region

- IT has varying levels of appeal in different regions:
 - Appeal is strong in LATAM and Europe
 - In LATAM in particular, IT is viewed more positively than in other regions (69% of respondents in LATAM would like to work for an IT company)
 - In North America, IT trails Technology, Logistics and Pharma/Life Sciences in terms of appeal
 - In APAC, IT doesn't even rank in the top four.
- In comparison to 2014-2016, globally IT has fallen from 1st place to 2nd and has been overtaken by Technology, although the difference between these two sectors is minimal at just 1% point.
- To improve levels of attractiveness, IT can look to competing sectors like Technology, Pharma/Life Sciences and Automotive to understand their appeal and how to emulate this in each market.

sector appeal		1st	2nd	3rd	4th
	global	Technology	IT	Pharma/Life Sciences	Automotive
	Europe	Automotive	IT	Pharma/Life Sciences	Chemical
	North America	Technology	Logistics	Pharma/Life Sciences	IT
	LATAM	IT	Automotive	Logistics	Chemical
	APAC	Industrial	Technology	Pharma/Life Sciences	Retail

different regions favour different sectors but their key attributes are similar to those that define the top IT sector companies globally

- Several key attributes are present across the top sectors in each region with financial health and use of latest technologies topping the ranks:
 - While being financially healthy is an obvious goal for all companies, and although the majority of respondents feel that the largest companies use the latest technologies available, when it comes to the importance of a future employer having the latest tech, respondents don't even rank it within the top 10. This could be because employees expect their employers to have up-to-date technology and so it is a necessity and not an individual employee advantage that benefits them on a personal level.
- IT sector companies can play to their advantage over other sectors as their work is considered to be stimulating and challenging – this could be the card to play to attract and retain high performing talent.
- Top sector companies are also deemed to have a very good reputation – something which people find important in deciding whether an employer is desirable or not:
 - Building a positive reputation can take time but the benefits are well worth it as 20% of the Randstad Employer Brand Research respondents feel that this is a 'must have' in a future employer.

core values attributed to top sector companies by region

IT sector global

- Uses latest technologies available
- Financially healthy
- Good reputation
- Stimulating and challenging work
- Career progression opportunities

technology sector in North America

- Uses latest technologies available
- Financially healthy
- Good reputation
- Stimulating and challenging work
- Career progression opportunities

automotive sector in Europe

- Uses latest technologies available
- Financially healthy
- Good reputation
- Long-term job security
- Career progression opportunities

IT sector in LATAM

- Uses latest technologies available
- Financially healthy
- Good reputation
- Career progression opportunities
- Stimulating and challenging work

industrial sector in APAC

- Financially healthy
- Good reputation
- Uses latest technologies available
- Long-term job security
- Career progression opportunities

big players are upping their game to make themselves as appealing as possible

willingness to work for each company

- Larger players in the IT sector are looking well beyond basic benefits to differentiate and appeal.
- Working environment, flexibility, health and wellness, parenthood and death benefits are all in consideration.
- Competitors should look to these for the 'gold standard' and aim to go beyond to attract and retain the best talent.

61%



- Offer medical, dental and life insurance in Ireland and the UK.¹³
- 2015 - highest ever retention rate 81%¹⁴
- Six week paid parental leave for US fathers¹⁵
- On site Wellness Centre with doctors, chiropractors, and dieticians at Apple HQ¹⁵
- There is also an on-site gym and physiotherapy for employees in Ireland.¹⁶
- Reimbursements for all classes taken by employees¹⁵
- Promise to roll out benefits to hourly employees who comprise 2/3 of the workforce in 2014¹⁵

67%



- In the Dublin office, there is a music room, a game room and a full-time masseuse.¹⁷
- Travel insurance is free, even on personal holidays.¹⁷
- Bereavement payment for spouses - 50% of salary for a decade, and child support to age 19 on top of life insurance¹⁸
- Six week paid parental leave for US fathers and a baby bonding bucks bonus for baby expenses¹⁹
- Credits towards a massage for a job well done²⁰
- Freedom to bring pets to work²⁰
- Free food and snacks available all day in the US, Ireland, France and the UK¹⁷

57%

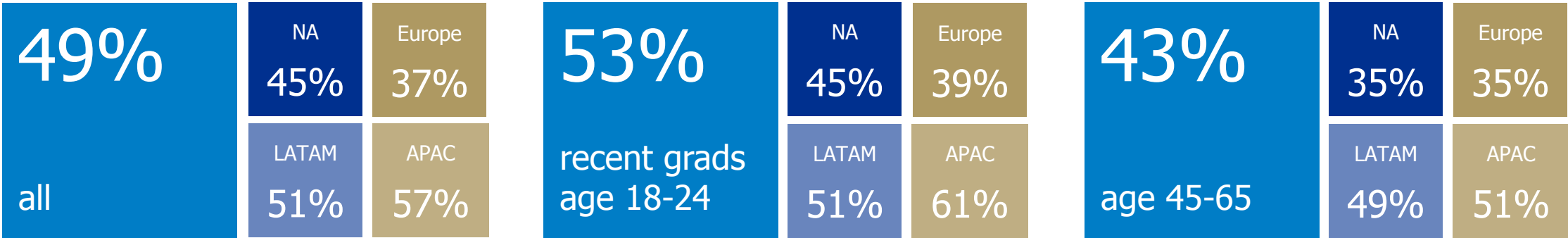


- In the UK, Graduate salaries start at £30k (£35k for those joining IBM's Strategic Analytics Consultant programme).²⁰
- 2014 awarded the 'Flexible/agile working award' for its focus on flexible working for all employees²¹
- Six week paid parental leave for US fathers²²
- Service that allows mothers to easily ship expressed breast milk home to babies while traveling on business²²
- Many U.S. employees will soon be able to access extra advice for oncology diagnoses and treatments through a new employee benefit via IBM Watson²³
- IBM is also one of the few big IT companies to have a female CEO who acts as a role model for female IT workers speaking at such conferences as Women in Computing.
- Across the globe, IBM offers flexible working hours, training programs and development opportunities.

there is a large potential pool of talent willing to work in IT

- Despite the acknowledged shortage of IT professionals, almost half of all adults are willing to work for an IT sector company, a large potential talent pool which may be tapped.
- The IT sector appeals more to a younger audience. Globally, young recent graduates are significantly more willing to work for a company in the IT sector than those 45-65:
 - This suggests an opportunity to find ways to make IT appealing to older jobseekers.
- This pattern is reflected regionally, where there are likewise significant differences in how willing recent graduates from each area are to work for an IT sector company:
 - IT is particularly appealing in APAC markets
 - Europe significantly underperforms the average, suggesting there are lessons in what makes an employer attractive to IT professionals to be learned from the top IT sector companies in APAC and LATAM.

willingness to work for an IT sector company



Base: REBR study 2017, all aged 18-65/recent grads 18-24/all aged 45-65

looking ahead

A summary of key areas that should be considered by employees in your sector to improve your employer brand and therefore attractiveness in this competitive landscape.

retraining and redeployment could be the answer to the IT skills shortage and automation

- **58% of all employed adults would be willing to retrain to stay within an organisation if their job was at risk of automation:**
 - 50% of all employed adults without a degree would do so, suggesting a correlation between education level and openness to retraining.
- **68% of those working in an IT capacity would also be willing to retrain if their job was lost due to automation:**
 - Internal retraining and redeployment could be helpful
 - According to a survey in the US, 75% of employed adults expect to have two or more careers in their lifetime²⁴
 - Existing employers have an advantage: 66% of employed US adults would find out if their current company has a position that sparks their interest before looking elsewhere²⁴
 - There is room to exploit this: just 32% of US employees say their employer encourages staff to work in different departments to gain skills and even fewer, 22%, have made a lateral move internally.²⁴
- **Regionally, the majority of those working in an IT capacity particularly in LATAM and APAC, also are willing to retrain:**
 - 76% in LATAM and APAC, 62% in North America, trailed by 56% in Europe.
- **Forward-thinking companies are already on the case:**
 - AT&T is investing \$1 billion in retraining 100,000 employees so their jobs will not become obsolete due to tech advances²⁵
 - Multinational insurance giant, Aviva is polling staff to assess willingness to retrain if they think their jobs will become automated.²⁶

Base: REBR study 2017, all aged 18-65/All employees who work in an IT capacity

a changing and challenging landscape with opportunity particularly for millennials

- Economic volatility and unemployment remain a fear for many:
 - 39% of Millennials in emerging markets and 31% in mature markets are personally concerned about them²⁷
 - This is mirrored by an apparent increased need for stability as the proportion intending to leave their jobs within two years dropped from 44% in 2016 to 38% in 2017.²⁷
- According to IDC Executive Vice President, Worldwide Research Products & Chief Research Officer Crawford Del Prete, the IT market is undergoing “the largest technology transformation in generations”.²⁸
- Attitudes among the global workforce are changing with people, in particular Millennials, becoming more demanding and harder than ever to please, according to their senior managers.²⁹
- Women are ever keener to be treated equally: pay, promotions and employment terms are all on the agenda.³⁰
- The shortage of STEM professionals looks set to continue in the near future.

employees demand more

63%

UK managers agree **millennials** require most guidance and support from managers²⁹

51%

UK managers agree **millennials** are difficult to retain for a long time²⁹

treat women equally

25%

US women feel their gender has hindered their progress³⁰

ongoing stem skills shortage

43%

UK STEM vacancies hard to fill³¹

500k

unfilled ICT jobs in Europe by 2020³²

825k

unfilled digital jobs in Europe by 2020³³

2.4m

unfilled STEM jobs in US by 2018³⁴

many see the rise of automation as a benefit rather than a concern

- **Automation is a subject of great debate, but it is seen largely as a positive:**

- 80% of companies replacing roles with AI technologies plan to retrain or redeploy displaced employees³⁵
- AI will cause greater investment in workforces specifically in China where 95% of companies using AI will invest more as a result³⁵
- 40% of all employed adults think automation will make their job better
- Just 13% worry it will take their job away while 39% think it will have no effect
- Of those who work in an IT capacity, 51% think it will make their job better, while 33% think it will have no effect
 - Europe (43%) and North America (42%) are less optimistic but in LATAM almost two thirds of all IT workers believe it will make their job better.

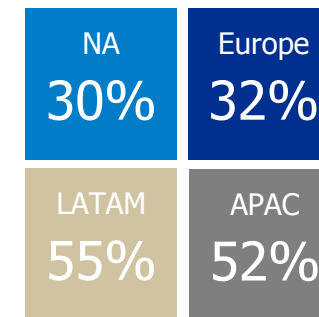
- **However, according to the World Bank, two thirds of all jobs in the developing world are susceptible to automation:**³⁶

- The broader population in the developed world shares these concerns - in the US 55% of jobseekers are concerned to some degree over job obsolescence³⁷
- In Japan 21% of jobs are at potential high risk of automation³⁸
- 35% of male jobs are reportedly at risk of automation vs 26% of women's.³⁸

- **Randstad has seen a decrease in the shelf life of IT skills to 3 to 5 years due to new ways of building apps and changes to infrastructure and security which are getting smarter, more widely distributed, and innovative:**³⁹

- As shown, forward-looking companies such as AT&T are helping employees anticipate and navigate automation through retraining options.

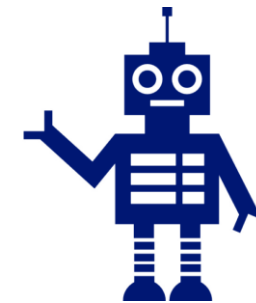
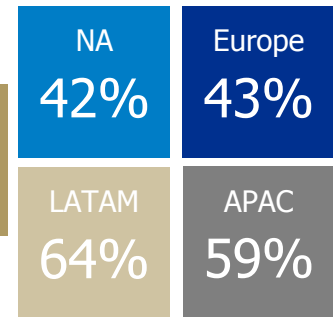
general automation will make my job better



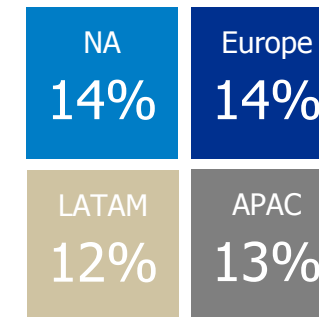
global
40%

all IT
51%

IT automation will make my job better



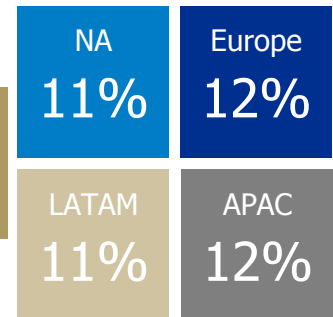
automation will take my job away



global
13%

all IT
12%

automation will take my job away



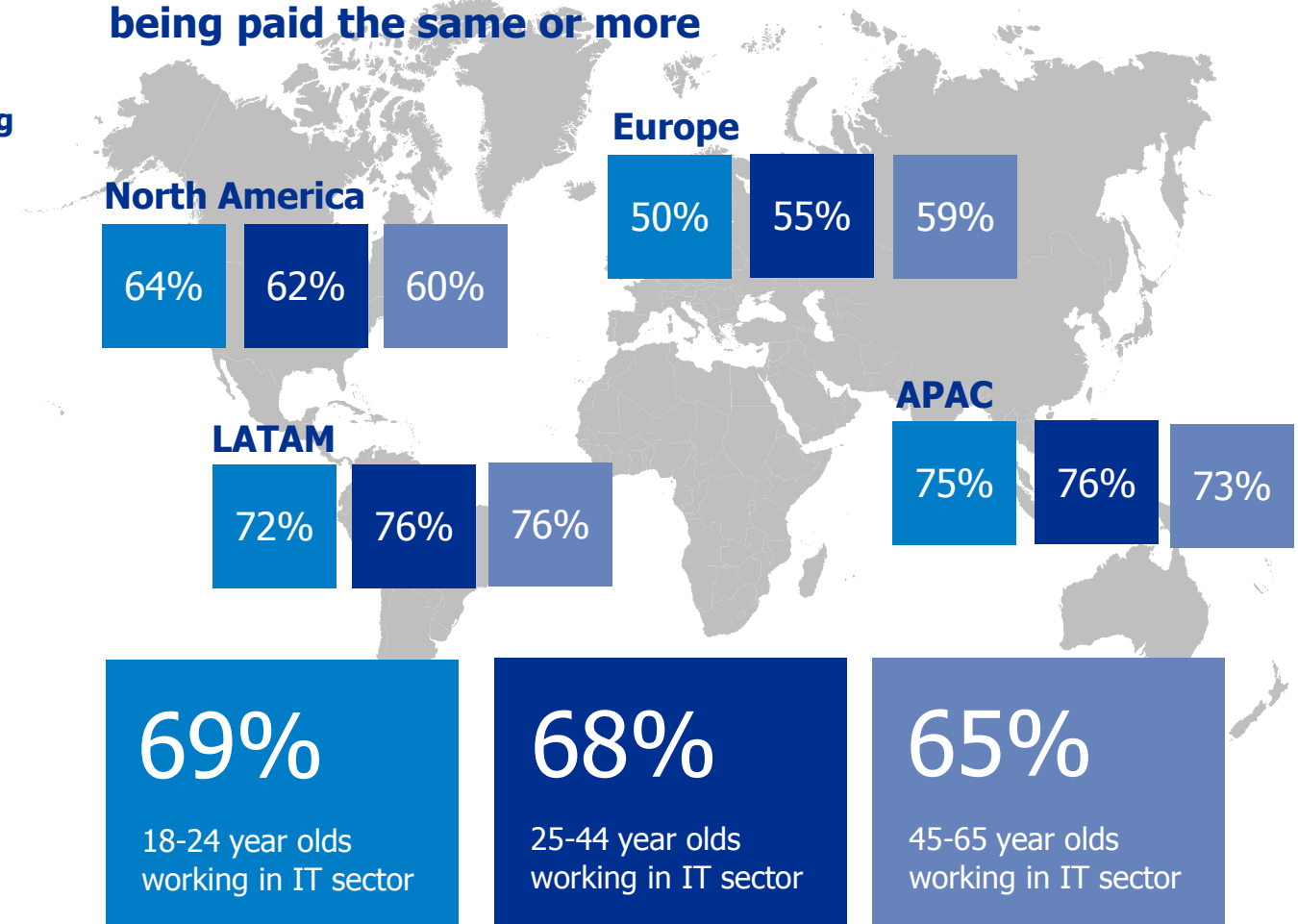
Base: REBR study 2017, all aged 18-65/All employees who work in an IT capacity

how workforce demographics influence future talent policy

- **There is an undeniable IT skills shortage. Going forward IT companies will have to think differently about their talent policy and look at a wider pool of people.**
- **Regionally APAC and LATAM IT employees are most willing to retrain if their former jobs were automated:**
 - Within APAC, 84% Chinese, 78% of Malaysian and 76% of Singaporean IT employees would be willing to retrain
 - Within LATAM, 77% of Brazilian IT employees and 74% Argentinian IT employees would be willing to retrain.
- **Employees of all ages have an appetite for continued professional development.**
 - In the US in 2015, 63% of workers (36% of all adults) took a class or got extra training in the last year. 55% did so to learn, maintain or improve their job skills.⁴⁰
 - 80% of users of the online learning platform Coursera already have degrees.⁴¹
- **As people work longer, focusing on a more mature audience that is willing to retrain to keep their jobs may be the way forward:**
 - As shown, forward-looking companies such as AT&T and Aviva are helping employees anticipate and navigate automation through retraining options.

Base: REBR study 2017, All employees who work in an IT capacity

willingness to retrain to keep their job if they were being paid the same or more



See bibliography for footnote sources

looking ahead – what the IT sector needs to focus on for the future

- **The IT sector is potentially at risk of losing employees due to the attractiveness of other sectors such as Engineering and Pharma/Life Sciences:**
 - Focus on retaining existing employees as well as attracting new ones is particularly important.
- **Globally women largely want the same things as men when it comes to a potential employer, both within the IT sector and in general:**
 - However, a pleasant work atmosphere is particularly important to women.
- **Focusing on hygiene factors like salary and benefits will not help a company stand out and attract the best candidates:**
 - Focus should be instead on other factors which could differentiate them like a pleasant work atmosphere and long-term job security
 - Randstad has found that IT jobs are not just about “programming” and are instead becoming more multi-disciplinary. There is a need for companies to focus on hiring employees with strong soft skills as these are becoming more important in the constantly changing IT environment.
- **Recent graduates are much more attracted to working within the IT sector than their older cohorts.**
- **Female IT employees in LATAM are the only group in the regions we surveyed to value career progression more highly than an attractive salary and benefits. They are also the only subgroup to rank “Work that is stimulating and challenging” in their top five priorities.**

employer branding

The value and importance placed on employer branding in terms of reputation and therefore attractiveness continues to grow in an increasingly competitive global talent marketplace.



why employer branding matters

Companies with positive brands get twice as many applications as companies with negative brands, and they spend less money on employees⁴²



50% of candidates say they wouldn't work for a company with a bad reputation - even with a pay increase⁴²



80% of talent leaders agree that a strong employer brand has a significant impact on their ability to hire great talent.⁴³ And because 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. And 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.

96%

Agree that alignment of personal values with a company's culture is a key factor in their satisfaction working there⁴⁴

Companies with bad reputations pay 10% more per hire⁴⁵



62% of candidates research companies on social media before applying⁴⁶



88%

Millennials and minorities agree that being part of the right company culture really matters to them⁴⁴

87%

Joined a company specifically because of cultural fit⁴⁴

80%

Have left a company specifically because of its culture⁴⁴

the commercial value of a strong employer brand is increasingly recognised

- **There is growing concern among CEOs about finding and keeping the best talent to achieve their growth ambitions:**
 - 38% of global employers reported talent shortages in 2015, the highest percentage since 2007⁴⁷
 - 73% of CEOs reported being concerned about the availability of key skills.⁴⁸
- **Companies that have strong employer brands enjoy significant cost savings with lower cost per hire and employee turnover rates:**
 - Cost per hire is over two times lower for companies with strong employer brands⁴⁹
 - Companies with stronger employer brands have 28% lower turnover rates than companies with weaker employer brands⁴⁹
 - 59% are investing more in their employer brand compared to last year.⁵⁰

'The future of work will bring radical change for talent, companies and society, a change where the digitalization is disrupting many traditional approaches from education to employment.'

Jacques van den Broek, CEO Randstad

80%

Over 80% of leaders acknowledge that employer branding has a significant impact on their ability to hire talent.⁵¹

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