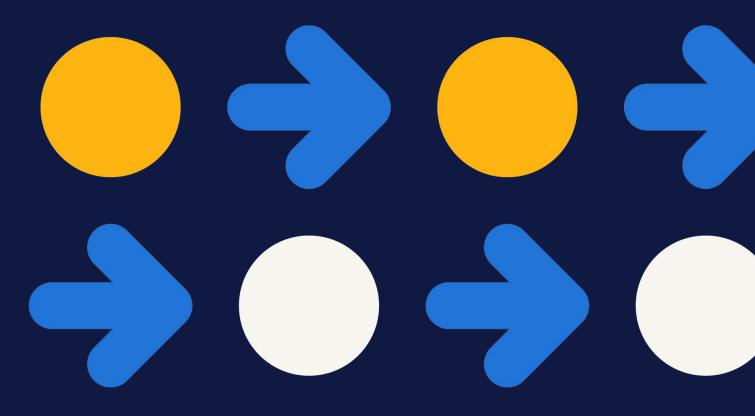
employer brand research 2021



united kingdom.

human forward.



content.

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



what is the randstad employer brand research?

- a representative employer brand research based on perceptions of the general audience. Optimising over 21 years of successful employer branding insights.
- an independent survey with over 190,000 respondents in 34 markets worldwide.
- a reflection of employer attractiveness for the market's 150 largest employers known by at least 10% of the population.
- provides valuable insights to help employers shape their employer brand.



the employer brand roadmap.

audit current employer brandemployer brand storyexternal perception	interview employees and leader to understand: • their perception of your brand • gaps and areas for improvement	for workforce		
develop the employer brand strategy and creative assets	create the brand pillars and employee value proposition	external market analysis • career motivations and de • specific views of your company improvement		
	launch employer brand internally gain employee + leadership feedback	activate employer brand externally	measure, assess & refine	

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 obstacle to candidates in the application process is not knowing 1-2x faster time to hire.⁸ what it's like to work at an organisation.7

#1

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.



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

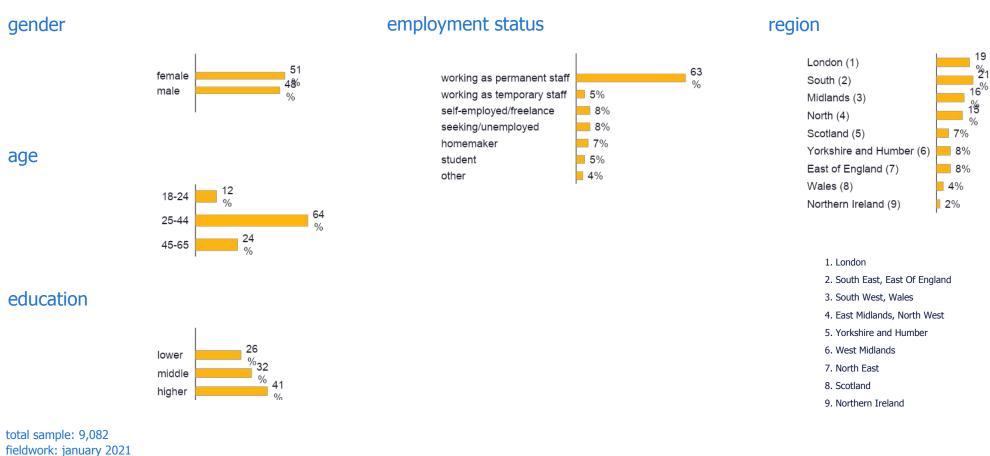
- 9,082 respondents
- fieldwork
- online interviews
- january 2021

length of interview

• 16 minutes

sample composition in the united kingdom socio-demographics, employment status, region.

ገበ



sample composition in the united kingdom sector, function.

Sector agriculture oil & gas manufacturing utilities construction trade transportation & storage accommodation & food ICT finance & insurance real estate professional & scientific administration & support

public administration

arts & entertainment

education

healthcare social work

1%

1%

2%

6%

4%

4%

2%

2%

4%

5%

5%

9%

9%

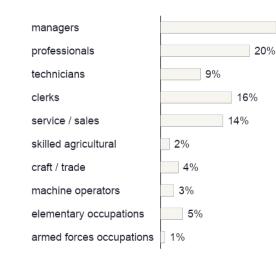
6%

7%

8%

10%

function



26%

base: currently employed (n=6,869)



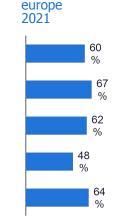
united kingdom

employer attractiveness.



what potential employees want the 5 most important drivers when choosing an employer.

work-life balance65%attractive salary & benefits64%job security61%good training58%pleasant work atmosphere55%





*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 **not researched in 2021

top 5 most important drivers

what potential employees want when choosing an employer.

most important driver

work-life balance and salary & benefits

Work-life balance and salary & benefits are the most important drivers among employees in the UK. Both these drivers are more prominent among women, those 35 and older and mid to higher-educated employees. Furthermore, these are the employees who are more demanding overall as they consider more than 8 drivers as essential. Men, employees 34 and younger, and the lower-educated consider on average 7 drivers as important. A COVID-19 safe work environment is rated 6th in importance among employees. Women (59%) and employees 55 and older (60%) find this element even more important than other demographic groups.

employers' proposition

a COVID-safe work environment

British employees rate their own employer highest on having a COVID-safe work environment, closely followed by having a very good reputation and offering long-term job security. The lowest ratings given by employees are for the possibility to work remotely, career progression, giving back to society, and salary & benefits. This is especially true among women, employees 55 and older, and the lower-educated. When looking at regional differences, employees living in the East of England are the least satisfied with their employer when it comes to salary and benefits and career progression.

recommended employer focus

work-life balance and career progression

There is a gap in what employees in the UK seek and what their employers are perceived to offer. Two of them concern work-life balance and career progression, which are of the most sought-after drivers and yet are not of the top attributes for UK employers. Employers in the UK may want to pay attention and deliver strategies to bridge this gap. Furthermore, employees rate their salary & benefits as one of the lowest drivers offered by their employer, despite this being an important driver for most employees. As this is a consistent driver coming up among employees, it may be worthwhile keeping this element in mind when focusing on employees' needs.

<u>click here</u> for a breakdown of the EVP importance results by socio-demographic profile.

<u>click here</u> for a deep dive into the most attractive sectors and employers in 2021.

what do potential employees want job collars in focus.

white-collar

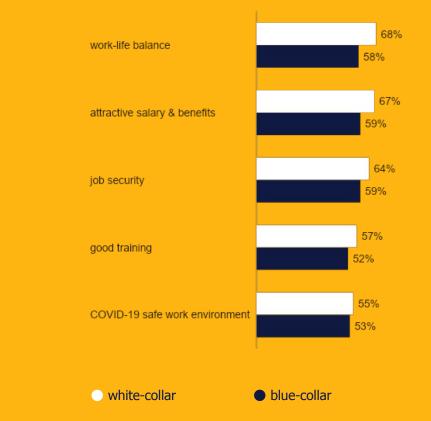
blue-collar

59%

68%

of white-collar workers consider work-life balance as the most important driver, more so than salary & benefits and job security. Overall, this group is more demanding in what they are looking for than the average UK employee. of blue-collar workers consider attractive salary & benefits and job security as the most important drivers. Overall, the average blue-collar worker rates each EVP driver as less important than that of white-collar employees.

most important attributes



job-switching behavior



switching behavior finding another employer.

about 1 in 5 British employees intend to change employer

12% Of employees in the UK changed their employer in the last half of 2020, more so among men, employees between 18-34, and mid to higher-educated employees. Furthermore, another 19% of employees intend to switch employers in the first half of 2021, which sees the same group of 18-34-year-olds and further mid to higher-educated employees intending to do so.

recruiters on top

Recruiters (33%) and job portals (29%) are the most used channels among switchers. Looking for a job via recruiters is especially popular among men, whereas women are more likely to use job portals for finding work. Indeed.com (74%) is the leading job portal among employees. Next to that, Google and LinkedIn are more likely to be used by men and mid to higher-educated employees.



most important attributes switchers vs. stayers.

switchers

²⁰²¹ 12% ²⁰²¹ 14%

changed employer in the past 6 months.

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

stayers

²⁰²¹

stayed with their employer in the past 6 months.

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

most important attributes



switching behavior job collars in focus.

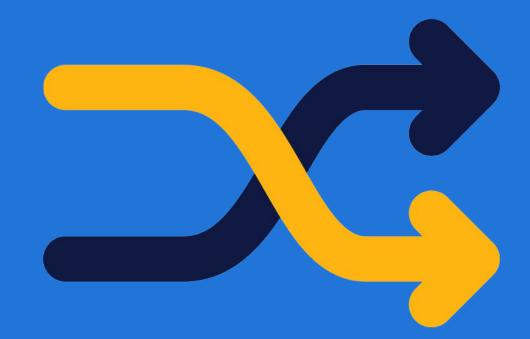
white-collar intenders

blue-collar switchers

18%

of white-collar employees intend to change to another employer in the first half of 2021. This is not too different from the average British employee (19%) who intends to switch employers. White-collar employees are more likely than the average UK employee to use recruiters (40%) for finding jobs. 14%

of blue-collar employees switched employers in the last half of 2020. This is not much different when compared to white-collar workers (13%).

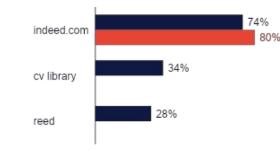


how do employees in the united kingdom find new job opportunities.

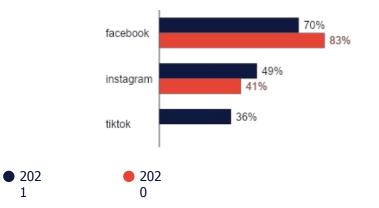
top 5 channels used to find new job opportunities 33% recruitment agencies 30% job portals / job boards (eg. cv library, totaljobs, monster, 29% indeed) 36% 25% google 23% 22% linkedin 18% 20% social media 19%

top 3 job portals

1



top 3 social media channels



changes in salary for job switchers.

24% of employees switched jobs for the same salary as their previous role.

48%

of employees aged between 55 and 64 reported a decrease in salary, when switching jobs.

28%

of employees based in the East of England took a pay cut when changing jobs.

decreases in pay.

Geographically, the East of England was the hardest hit by pay cuts. 28% of employees in the region who changed jobs, did so with a pay cut, compared to just 14% in London.

Looking at fluctuations in pay per sector, those working in agriculture and transportation saw the largest decreases in salary when changing roles, with a reduction of income reported by 44% and 43% respectively.

Types of roles most impacted by pay cuts when switching include;

- cleaners and agricultural workers, 32%
- plant and machine operators, 26%
- doctors and teachers, 23%

pay rises.

Nearly one in five (18%) manufacturing workers received a pay rise of £30,000 and upwards when changing roles.

29% of healthcare workers also received pay rises when changing roles, seeing an increase of between £500 and £2,000 per annum.

COVID-19

in focus.



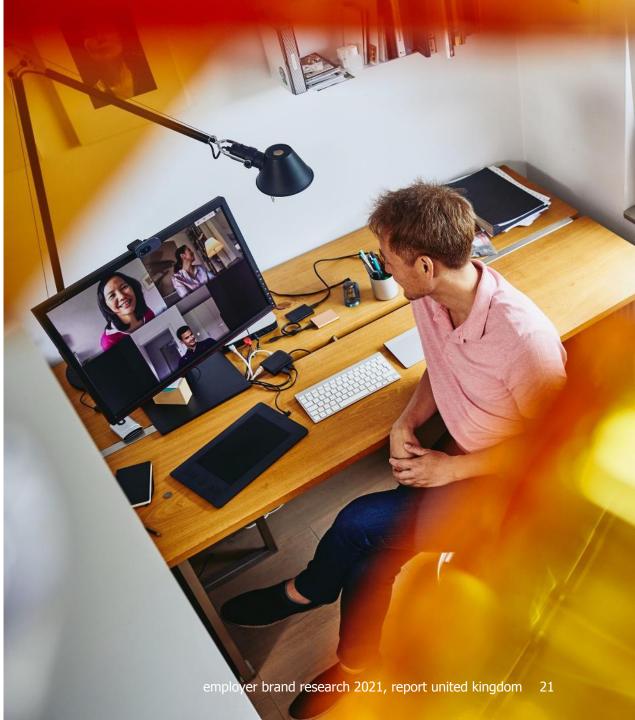
COVID-19 and its impact on the labor market.

possibility of working remotely relatively important

43% of employees in the UK are attracted by the possibility to work remotely, which makes this driver relatively important to employees but is not ranked as one of the top-most important. Women and higher-educated employees are more inclined to rank this driver as important, however, it still trails behind the drivers that are more attractive to them. There is no difference between those who work part-time or full-time when it comes to the importance of working from home.

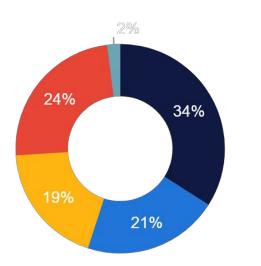
more than half of the employees started to work (more) remotely during COVID-19 pandemic

Out of the 55% employees who started working more remotely, 60% were involved in the decision to work remotely, whereas 39% of employees working remotely had no choice in the decision to do so. 44% of employees continued to work as normal, especially among men (51%) and higher-educated employees (50%).



remote working due to COVID-19.

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



yes (only)

yes (partly) no

impossible to work

possible, but employer
does not allow

united kingdom

28%

of the employees who said they worked remotely, do so out of their own decision. Men (33%), more so than women (22%) made their own choice to work from home, however, 35% of women were more seen to make this decision along with the authorities than men (29%). It is primarily the higher-educated employees that started working more remotely.

Only 2% of employees who can work from home are not allowed to do so by their employer. Next to that 24% of employees' jobs are bound to the premises which makes working from home or elsewhere impossible.

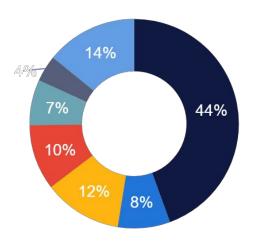
europe

23%

of the employees who said they worked remotely, do so out of their own decision. When looking across Europe, we do not see major differences among the socio-demographics as far as the decision to work remotely is concerned. Most European employees (40%) were obliged to work more remotely by their employer and / or the authorities. A very little proportion of Europeans who could work from home were not allowed to do so by their employer (2%). For 28% of Europeans, working from home is impossible as their jobs are bound to the premises with this being most often the case for the lower-educated (40%).

employment situation changes due to COVID-19.

how COVID-19 changed one's employment situation



- continuing to work as normal
- working longer hours than normal
- working reduced hours / reduced salary
- have been furloughed
- became unemployed
- other
- not applicable

four out of ten saw their employment europe situation change

41% of employees were either furloughed, became unemployed, worked different hours than usual or for other reasons saw their employment situation change due to COVID-19.

Employees aged between 18-24 (13%) were more likely to become unemployed than the average workforce.

Those who started working more hours are especially true among 25–34-year-olds (12%) and higher-educated employees (11%).

More men (51%) and higher-educated (50%) employees continued to work as normal.

39%

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

COVID-19 impact on career progression.

Do you feel that the Covid pandemic will directly impact your career progression in the next 12 months?

With an eye on progression, 25% of women do not believe that the pandemic will influence their career progression in the next 12 months, compared to just 17% of men.

A promotion is not expected to be received this year by 20%, amid financial difficulties and businesses finding their feet again post-pandemic.

38% of UK employees expect to stay at the same level, with no progression on the radar for the rest of 2021. However, those living in London have been most impacted by the pandemic in terms of progression, with 12% taking a demotion or having their role scaled back.

A deep dive into sectors identified manufacturing and utilities workers as the most confident about progressing in their role, with 13% and 18% still expecting to progress in 2020, respectively.



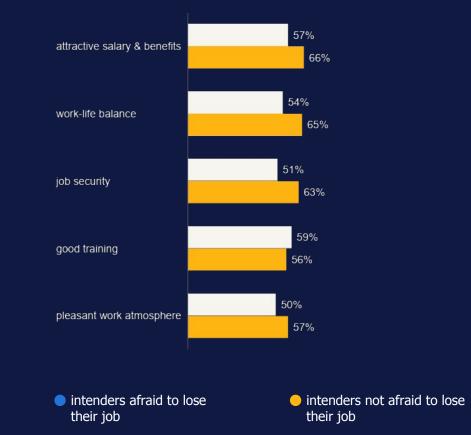
job loss fear in 2021 intention to switch.

30%

of the employees who are afraid of losing their job, plan to change their job in the next 6 months. 12%

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 **19%**

plan to change employer in the next 6 months.

intenders

²⁰²¹ 27%

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

If one's employment situation has changed due to COVID-19, the intention to change to a new employer is considerably higher (27%) than those who just intend to change employers (19%).

The way British employers have supported their employees and handled the pandemic has had a positive impact on loyalty among employees. Overall, 58% of employees feel more loyal to their employer as opposed to 10% who feel less loyal to their employer. Furthermore, mid to higher-educated employees (average 60%) feel more loyal to their employer than lower-educated employees do (48%).

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

job loss fear in 2021 due to COVID-19.

some fear of losing job

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

In the UK, 29% of employees indicated that they are afraid of losing their job. On the other hand, 45% of employees in the UK are not at all afraid of losing their job this year and this is especially true among 55 and older employees (58%).

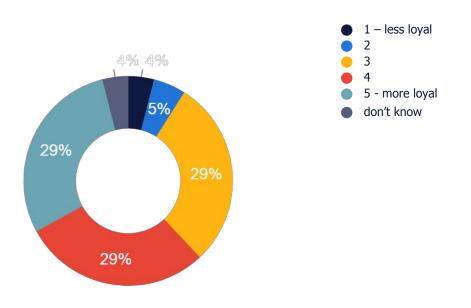
34% of those living in London are more worried about losing their job in 2021 compared to the other regions in the UK (average 28%). Whereas 60% of employees living in Northern Ireland are the least worried about losing their job, compared to the average 45% of all other regions in the UK.

30% Of employees who are afraid of losing their job plan to change their employer in the first half of 2021, whereas a mere 12% of employees who are not worried about becoming unemployed intend to switch jobs.



loyalty towards employers during the pandemic.

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



works only remotely

59% of the employees who only work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

obliged to work remotely

56% 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.

works partly remotely

57% of the employees who work partly from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

own decision to work remotely

58% 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.

let's talk.

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

randstad uk

James Robinson james.robinson@randstad.co.uk

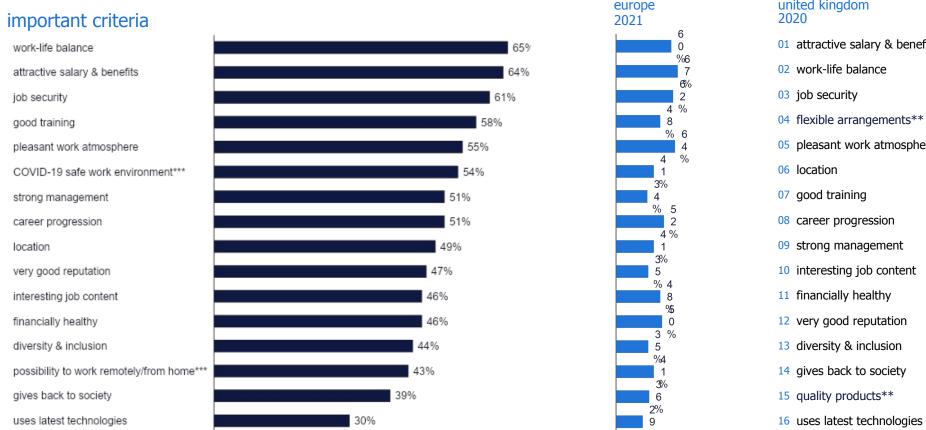


appendix 1



deep dive EVP drivers.

what potential employees want the most important criteria when choosing an employer.



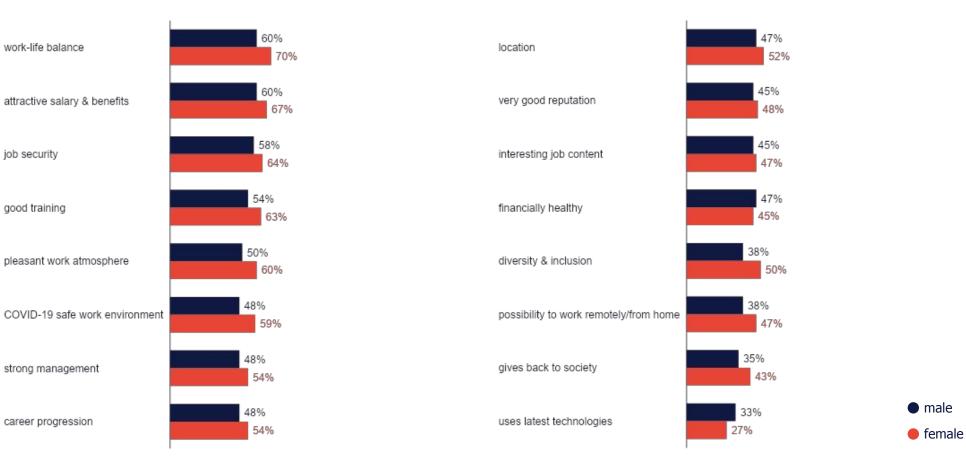
united kingdom united kingdom 2019 01 attractive salary & benefits 01 attractive salary & benefits 02 work-life balance 03 job security 04 pleasant work atmosphere 05 location 05 pleasant work atmosphere 06 good training 07 flexible arrangements** 08 career progression 09 strong management 10 interesting job content 11 financially healthy 12 very good reputation 13 diversity & inclusion 14 gives back to society 15 quality products**

16 uses latest technologies

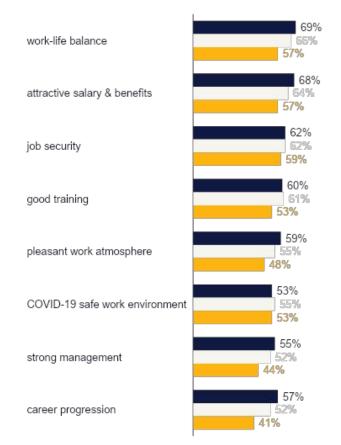
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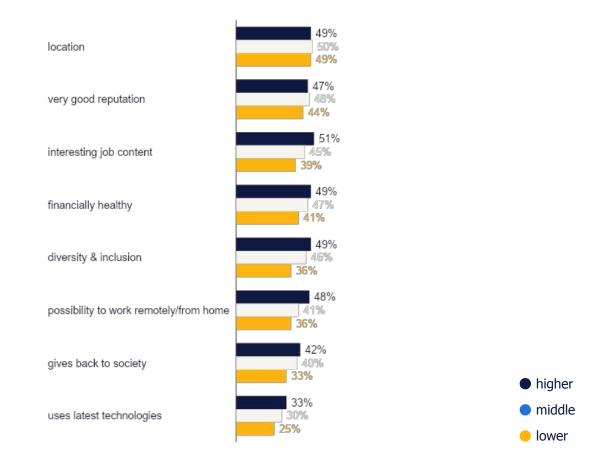
***only researched in 2021 **not researched in 2021

EVP driver importance by gender.

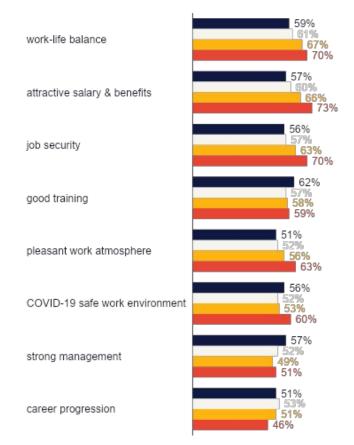


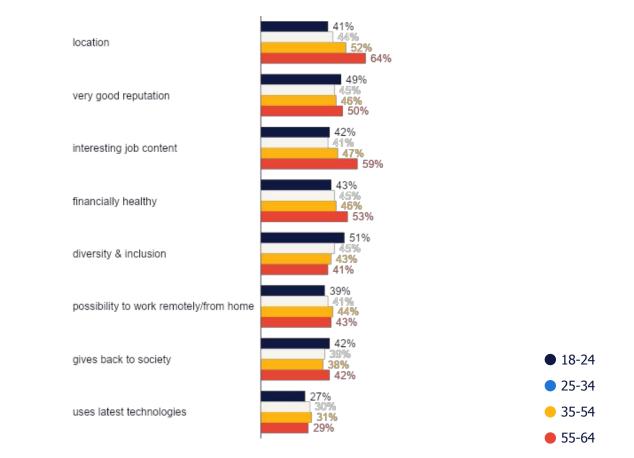
EVP driver importance by education.



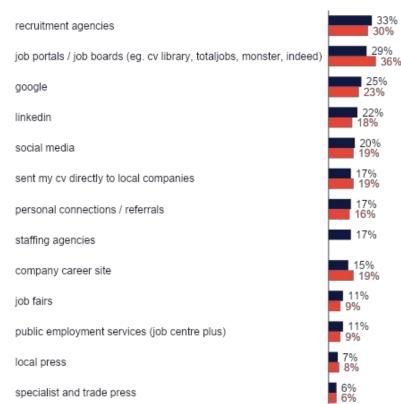


EVP driver importance by age.



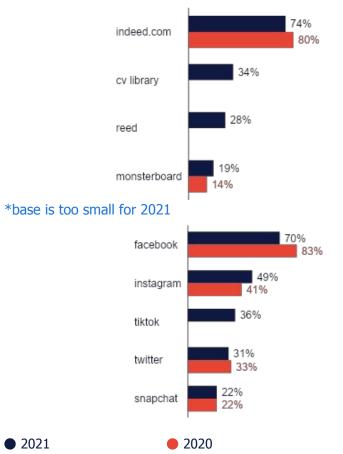


how do employees in the united kingdom find new job opportunities.



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 the united kingdom.

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

general perception of employers in the united kingdom

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

profile of ideal employer

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

perception of employer offer in the uk and the region.



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

employers in the united kingdom are perceived to offer

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

employers in europe are perceived to offer

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

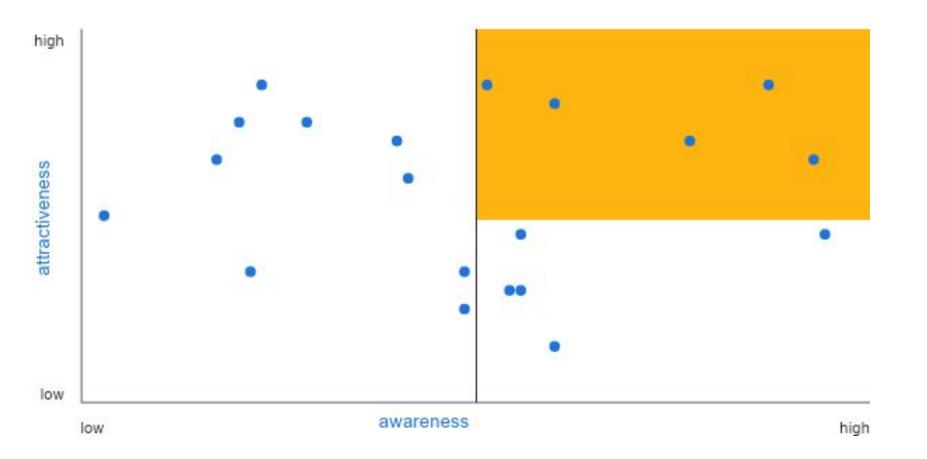






employer brand research 2021, report united kingdom | 39

top performing sectors in the united kingdom by awareness and attractiveness.





high attractiveness

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

uk's best performing companies by sector.

1/2	top 3 companies		
sector	1	2	3
01 marketing & media	WPP Group (Hill & Knowlton, JWT, Ogilvy Group, TNS)	Pearson (The Financial Times Group, Pearson & Penguin Randomhouse)	Thomson Reuters
02 electronic engineering	Philips	Siemens	Hitachi
03 professional services	PwC	Deloitte	IBM
04 automotive aerospace	British Airways	BMW	Rolls-Royce Group
05 investment banking	Barclays Investment Bank	JP Morgan	Deutsche Bank
06 pharma life science	GlaxoSmithkline (Ribena, Lucozade, MacLean's)	AstraZeneca	Merck
07 manufacturing	BOC (oxygen/gas supply)		
08 it & telecom	Amazon	IBM	Oracle
09 engineering	Rolls-Royce Group	BAE Systems	Laing O'Rourke
10 retail banking	Barclays Bank	Lloyds (incl. Halifax, Bank Of Scotland & Scottish Widows)	Nationwide Building Society

uk's best performing companies by sector.

2/2	top 3 companies		
sector	1	2	3
11 healthcare	Southern Cross Healthcare Group	Bupa Care Services	GlaxoSmithkline (Ribena, Lucozade, MacLean's)
12 construction	Laing O'Rourke	Kier Group	Amey
13 retail	John Lewis	Amazon	Boots
14 fmcg	Coca Cola	Mondelēz International (Cadbury, Dairylea, Kenco)	Unilever (Dove, Persil, Bovril)
15 business services	Royal Mail	SSP Group	Accenture
16 mineral fuel	Glencore International	BP	EDF Energy
17 transport and logistics	Royal Mail	Network Rail	XPO Logistics
18 insurance	Zurich Insurance	Aviva	AXA Group
19 utilities and energy	GE	BOC (oxygen/gas supply)	EDF Energy
20 leisure	Carnival UK	Merlin Entertainments (Alton Towers, Legoland,)	TUI Group

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

1/2

top 3 EVP drivers

sector	1	2	3
01 marketing & media	financially healthy	COVID-19 safe work environment	career progression
02 electronic engineering	financially healthy	very good reputation	COVID-19 safe work environment
03 professional services	financially healthy	COVID-19 safe work environment	attractive salary & benefits
04 automotive aerospace	financially healthy	COVID-19 safe work environment	very good reputation
05 investment banking	financially healthy	attractive salary & benefits	COVID-19 safe work environment
06 pharma life science	financially healthy	COVID-19 safe work environment	attractive salary & benefits
07 manufacturing	financially healthy	COVID-19 safe work environment	very good reputation
08 it & telecom	financially healthy	COVID-19 safe work environment	career progression
09 engineering	COVID-19 safe work environment	financially healthy	attractive salary & benefits
10 retail banking	financially healthy	COVID-19 safe work environment	career progression

uk's sectors score best on these 3 EVP drivers. 2/2

top 3 EVP drivers

sector	1	2	3
11 healthcare	financially healthy	COVID-19 safe work environment	job security
12 construction	COVID-19 safe work environment	financially healthy	career progression
13 retail	financially healthy	very good reputation	COVID-19 safe work environment
14 fmcg	financially healthy	COVID-19 safe work environment	very good reputation
15 business services	financially healthy	COVID-19 safe work environment	career progression
16 mineral fuel	financially healthy	COVID-19 safe work environment	career progression
17 transport and logistics	financially healthy	COVID-19 safe work environment	job security
18 insurance	financially healthy	COVID-19 safe work environment	very good reputation
19 utilities and energy	financially healthy	COVID-19 safe work environment	job security
20 leisure	financially healthy	COVID-19 safe work environment	pleasant work atmosphere





employers.

top employers to work for in the united kingdom.

top 10 employers 2021	top 10 employers 2020
01 John Lewis	01 Rolls-Royce Group
02 British Airways	02 Marks & Spencer
03 Amazon	03 Jaguar Land Rover
04 BMW	04 Carnival UK
05 Royal Mail	05 John Lewis
06 Rolls-Royce Group	06 BMW
07 PwC	07 IBM
08 WPP Group (Hill & Knowlton, JWT, Ogilvy Group, TNS)	08 British Airways
09 Boots	09 Ford
10 Coca Cola	10 Royal Mail

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

top 5 companies	1	2	3
1 John Lewis	very good reputation	pleasant work atmosphere	COVID-19 safe work environment
2 British Airways	attractive salary & benefits	very good reputation	career progression
3 Amazon	financially healthy	COVID-19 safe work environment	job security
4 BMW	financially healthy	very good reputation	attractive salary & benefits
5 Royal Mail	job security	financially healthy	very good reputation

uk's top employers by EVP driver.

EVP driver	1	2	3
work-life balance	Merck	Vinci	Nationwide Building Society
attractive salary & benefits	Goldman Sachs	KPMG	Morgan Stanley
job security	Coca Cola	PwC	Bupa Care Services
pleasant work atmosphere	Thomson Reuters	Boots	Nationwide Building Society
COVID-19 safe work environment	AstraZeneca	HSBC	EY (Ernst & Young)
career progression	EY (Ernst & Young)	IBM	Deloitte
very good reputation	John Lewis	IBM	Nationwide Building Society
financially healthy	Amazon	Coca Cola	Mondelez International (Cadbury, Dairylea, Kenco)
possibility to work remotely/from home	PwC	Zurich Insurance	Cap Gemini
gives back to society	Co-op Food	Sainsbury's	Veolia

appendix 3



methodology.

employer brand research set up.

30 companies	smart sampling	drivers
per respondent	Each respondent is shown 30 companies. Each company is	each company is evaluated on:
'do you know this company?': determines awareness.	evaluated only by respondents who are aware of that particular brand.	01 financially healthy
for each company	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.	02 COVID-19 safe work environment
known	This method ensures that the lesser known companies are shown to	03 very good reputation
'would you like to work for	That way the Randstad Employer Brand Research assures dependable insights for both well known and lesser known employer brands.	04 job security
this company?': determines attractiveness.		05 career progression
	-	06 gives back to society
each company known		07 possibility to work remotely/from home
rating on a set of drivers: determines reason for attractiveness.		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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