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Employer
Branding NOW





EXECUTIVE SUMMARY

Universum, the global employer branding leader, and DHI Group, Inc., operator of online career sites for technology professionals and other select professional communities, surveyed 2,490 Employer Branding Professionals, consisting of HR managers, marketing managers, talent acquisition, recruiting and resourcing managers from 50 different countries and 35 different industries from January to April 2017.

Our survey's target companies included: small (1-999), medium (1,000-9,999) and large organizations (10,000+) as well as the companies Universum established as the year's World's Most Attractive Employers (WMAE).

Fact: 68% of the WMAE from 36 different countries participated in our survey.

The Breakdown

- ✓ **Respondents:** 2,490
- ✓ **Industries:** 35
- ✓ **Countries:** 50

Why Pay Attention to the World's Most Attractive Employers (WMAE):

The WMAE represent the top 100 most attractive employers, as ranked among students in a Universum study across the 12 leading global economies: France, Italy, Germany, Canada, Russia, Japan, China, India, South Korea, Brazil, the UK and the US. This group of top global employers tend to invest more in employer brand marketing and generally lead best practice.

Survey Field Period

January 2017 – April 2017

 Includes 2,490 respondents from 50 countries



Target Groups



Small Companies
1 – 999 employees



Medium Companies
1,000 – 9,999 employees



Large Companies
10,000+ employees

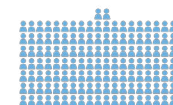


WMAE
The World's Most Attractive Employers

About the WMAE Sample



68% of the WMAE companies have answered the survey and shared their knowledge



142
The WMAE sample consists of 142 respondents



36
WMAE from 36 different countries are included



20
WMAE from 20 different industries are included

- ✓ A significantly larger proportion of medium to large companies have invested in Employer Value Proposition (EVP) development over the last **12 months**.
- ✓ Tailoring employer brand activities to different target audiences has risen to one of the **top three priority** objectives among leading employers.
- ✓ Social media channels are continuing to attract the **greatest increases** in employer brand and recruitment marketing investment.
- ✓ Investment in employee referral is also on the rise, alongside a more general focus on employee advocacy with **41% of the WMAE** citing this as a primary employer brand objective, compared to 30% last year.
- ✓ **Visual content** has moved to the center stage with the usage of YouTube and Instagram increasing by 15% since 2016. Employee photos and videos moved to first place in terms of the type of content most deployed by the WMAE.
- ✓ There is an **increased focus** on employer brand measurement among medium to large companies with more measures deployed now than in 2016.

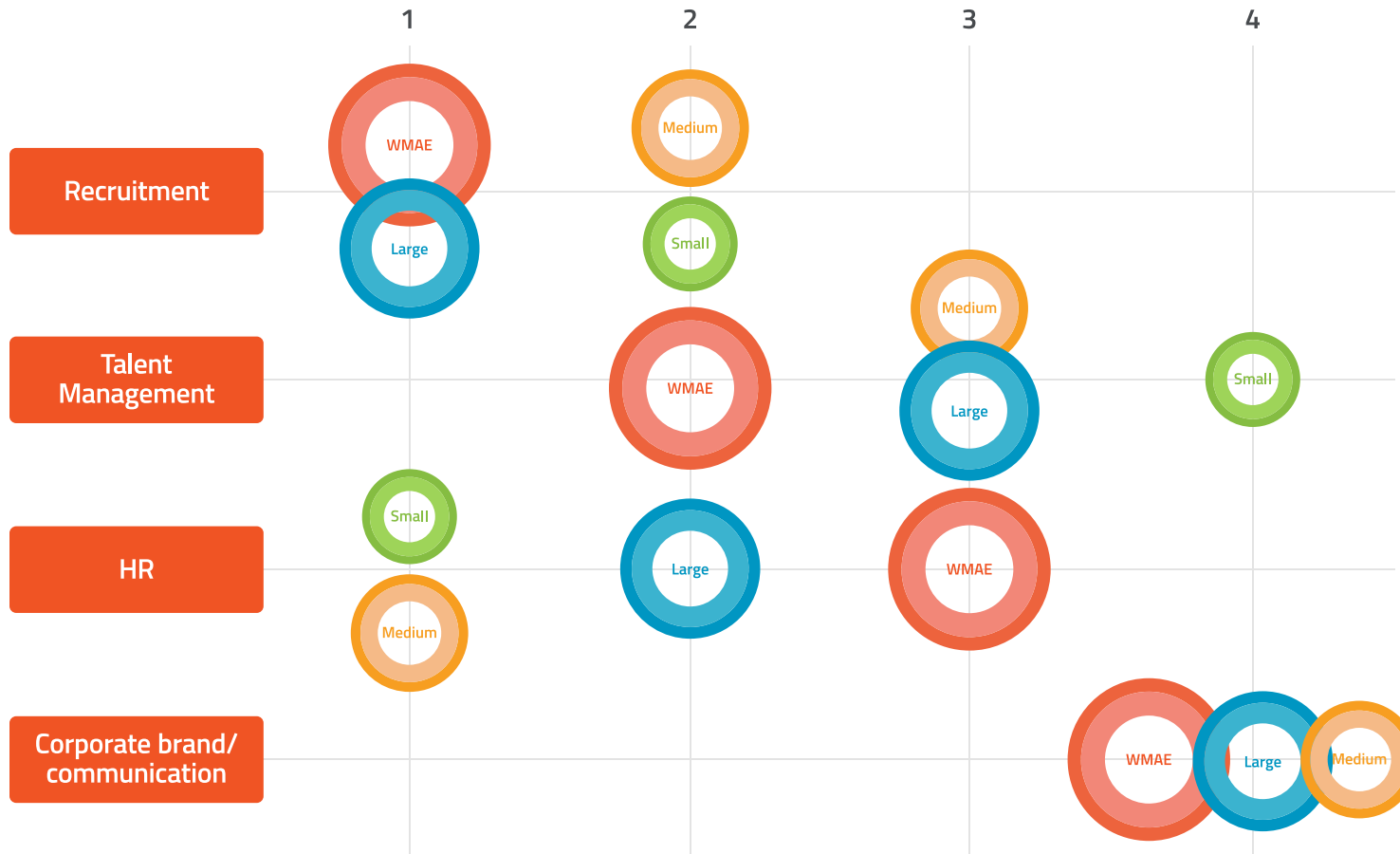


TRENDS WORTH WATCHING

While the majority of companies have mostly focused on extending their employer brand strategy to candidate management and onboarding since 2016, the biggest increase in focus from a people management perspective has been in the alignment of leadership behaviors with the employer brand.

1 TAKING THE LEAD

Which role/function would you describe as primarily responsible for coordinating your overall employer brand strategy and activities?

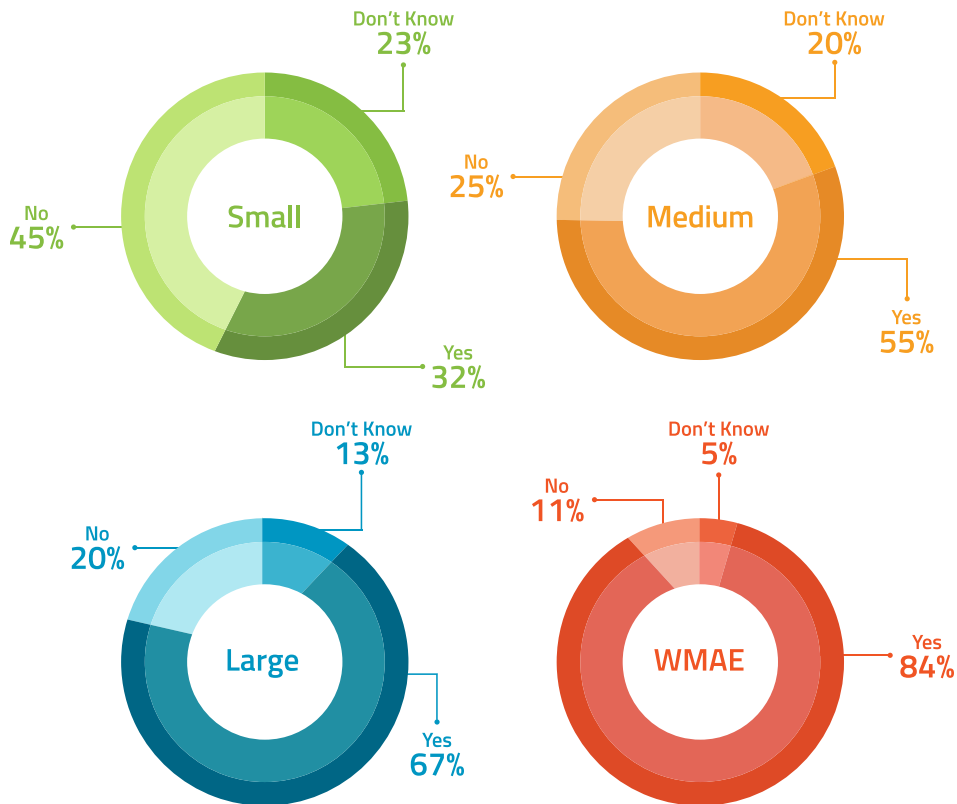


When asked which department primarily owns employer brand strategy development and activities, HR and recruitment were clearly favored over corporate brand/communication functions. However, ultimate accountability for the health of the employer brand was agreed by the majority of respondents from companies of all sizes to sit with the CEO.

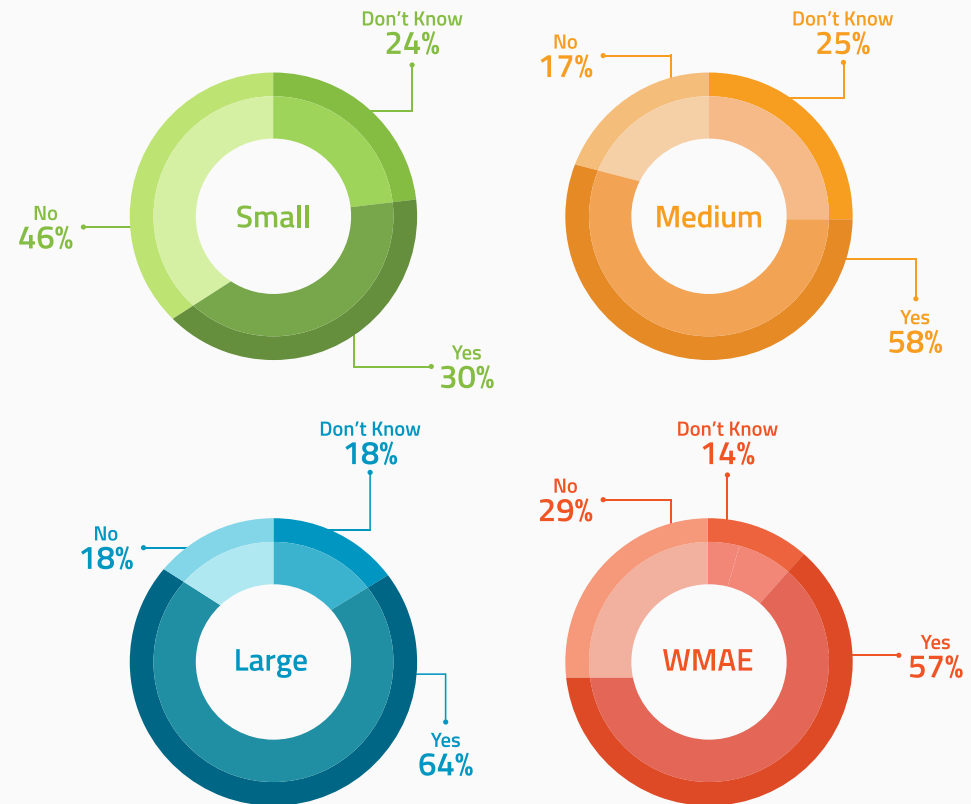
While ownership of employer branding has shown little change since 2016, wider understanding of the discipline has notably improved.

2 ANCHORING THE EMPLOYER VALUE PROPOSITION (EVP)

Has the organization developed an Employer Value Proposition (EVP)?



If the organization doesn't have an EVP, do they plan to develop one in the future?





Overall Trend Toward EVP Development

The overall trend towards EVP development is expected to continue with 50% of employers who have yet to develop an EVP aiming to develop one in the future.



EVP Development

In last year's survey, a significant proportion of medium to large employers expressed a commitment to EVP development, and they have clearly followed through. The proportion of companies among the World's Most Attractive Employers who have developed an EVP now stands at 84%. The majority of medium to large companies across the world also now claim to have developed an EVP, while among small companies only a third have developed this kind of proposition (showing little change since last year).

For large and medium organizations, the main challenge associated with EVP development is leadership commitment, which has become ever more important as the actions necessary to build a strong employer brand increasingly extend well beyond the confines of recruitment. For the WMAE, cost is the top challenge, given other competing demands on the overall HR budget, particularly the current focus on investment in HR Tech. For smaller organizations, the most common challenge, given more limited human resources, was simply finding the time.



WMAE: Cost



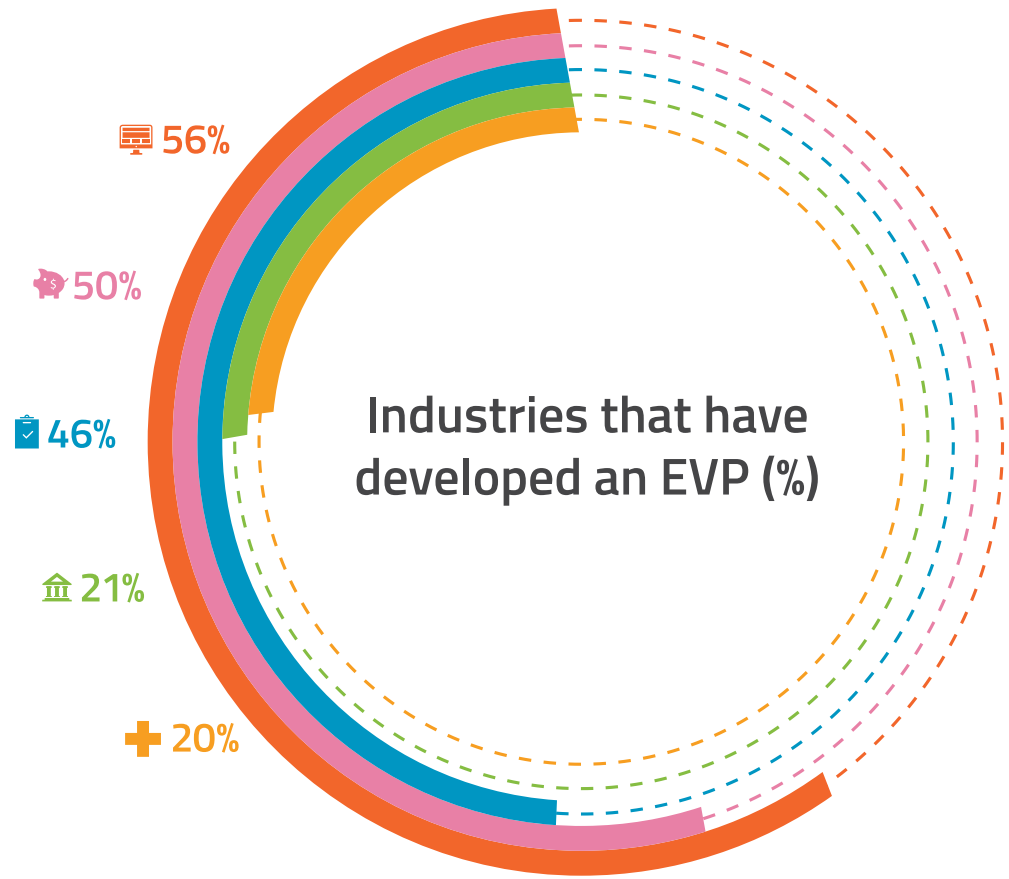
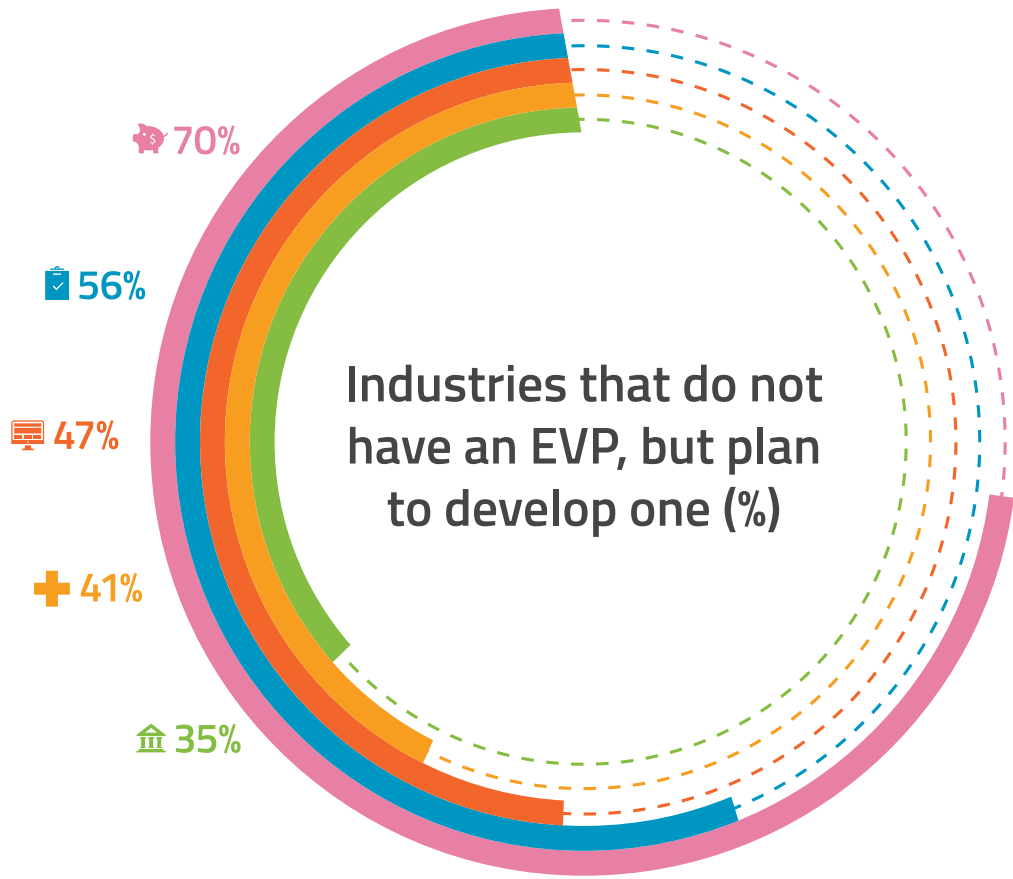
Large: Leadership commitment



Medium: Leadership commitment



Small: Finding the time



- Public Sector
- Software and Computer Sciences
- Health Care Services
- Banks
- Auditing, Accounting and Financial Services

Top 3 attributes in EVPs around the globe



USA

- 1 Challenging work
- 2 A friendly work environment
- 3 Commitment to diversity and inclusion

Brazil

- 1 Leadership opportunities
- 2 Ethical standards
- 3 Customer focus

South Africa

- 1 Leadership opportunities
- 2 Ethical standards
- 3 Professional training and development

Australia

- 1 A friendly work environment
- 2 Challenging work
- 3 Leaders who will support my development

UK

- 1 A friendly work environment
- 2 Challenging work
- 3 Customer focus

Russia

- 1 Professional training and development
- 2 Respect for its people
- 3 A friendly work environment

China

- 1 Attractive/exciting products and services
- 2 A creative and dynamic work environment
- 3 A friendly work environment

Top 5 attributes included in the EVP Industry comparison

Public Sector



- Challenging work
- Good reference for future career
- High level of responsibility
- Leaders who will support my development
- A creative and dynamic work environment

Software & Computer Science



- Innovation
- A creative and dynamic work environment
- A friendly work environment
- Challenging work
- Customer focus

Health Care Services



- A creative and dynamic work environment
- A friendly work environment
- Respect for its people
- Team-oriented work
- Challenging work

Banks



- Innovation
- A friendly work environment
- Attractive/exciting products and services
- Challenging work
- Customer focus

Auditing, Accounting & Financial Services



- A friendly work environment
- Leaders who will support my development
- Challenging work
- Professional training and development
- Commitment to diversity and inclusion

THE CURRENT STATE OF EMPLOYER BRANDING

“Hopefully this benchmark research will help in the process of persuading leaders that an EVP is now a critical success factor in bringing focus to the employer branding strategy.”

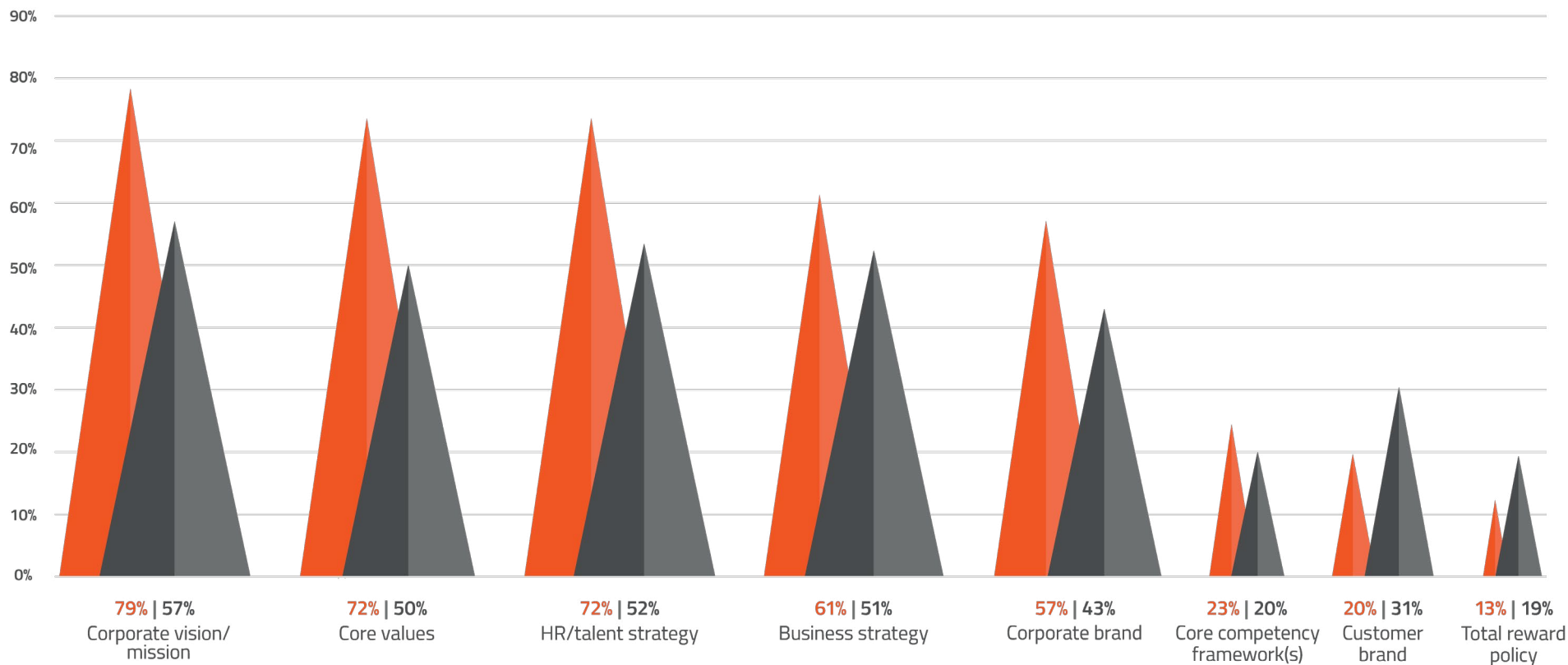
– Richard Mosley

Global Vice President of Strategy at Universum

3 ALIGNING WITH CORPORATE STRATEGY

Our EVP is clearly linked to our...

● WMAE ● Non-WMAE



When developing an EVP, the world's leading employers clearly believe that alignment with the wider corporate strategy is critical to success. These leading employers are significantly more likely to have aligned their EVP with the corporate vision, values and HR strategy than other companies.

This is reflected in the increasing number of leading employers who have opted for purpose-driven employer brands, whether 'Leading the future of beauty' or 'Shaping the future of sport' at L'Oréal and Adidas respectively; 'Building a better working world' at Ernst & Young; 'Building the earth's most customer-centric company' at Amazon or 'Connecting the world' at Facebook.



These leading employers are significantly more likely to have aligned their EVP with the corporate vision, values and HR strategy than other companies.

4 CREATIVE IDENTITY & VISUAL EXPRESSION

Fact:

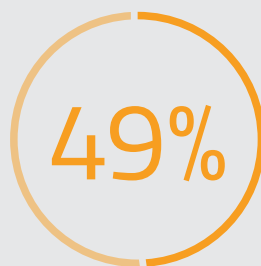
68% of the WMAE and 61% of large companies have developed employer branding guidelines compared to 49% of medium sized companies and 37% of small companies.



WMAE



Large



Medium



Small

Building a distinctive visual identity is important for companies of all sizes. Think of this as the body language of the employer brand expressed through logos, color palettes, fonts, imagery and other design elements. The visual aspects of an employer brand are important in communicating the culture and personality of the organization. They also play a key role in differentiating an employer from its talent competitors.

In addition, the WMAE (52%) and small businesses (34%) both cite the application of a consistent design style as their number one way of aligning internal communication with their external employer brand communication. Medium (42%) and large (45%) businesses also agree consistent design is a top priority.

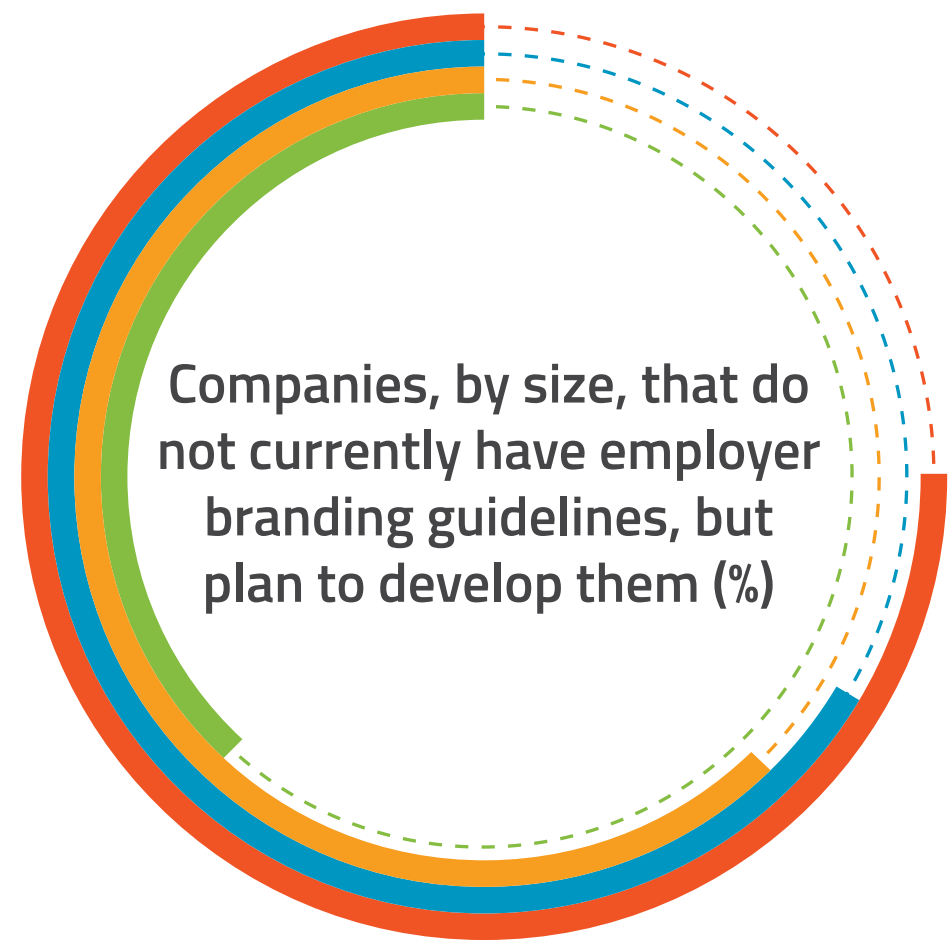


Companies, by size, that have employer brand guidelines (%)

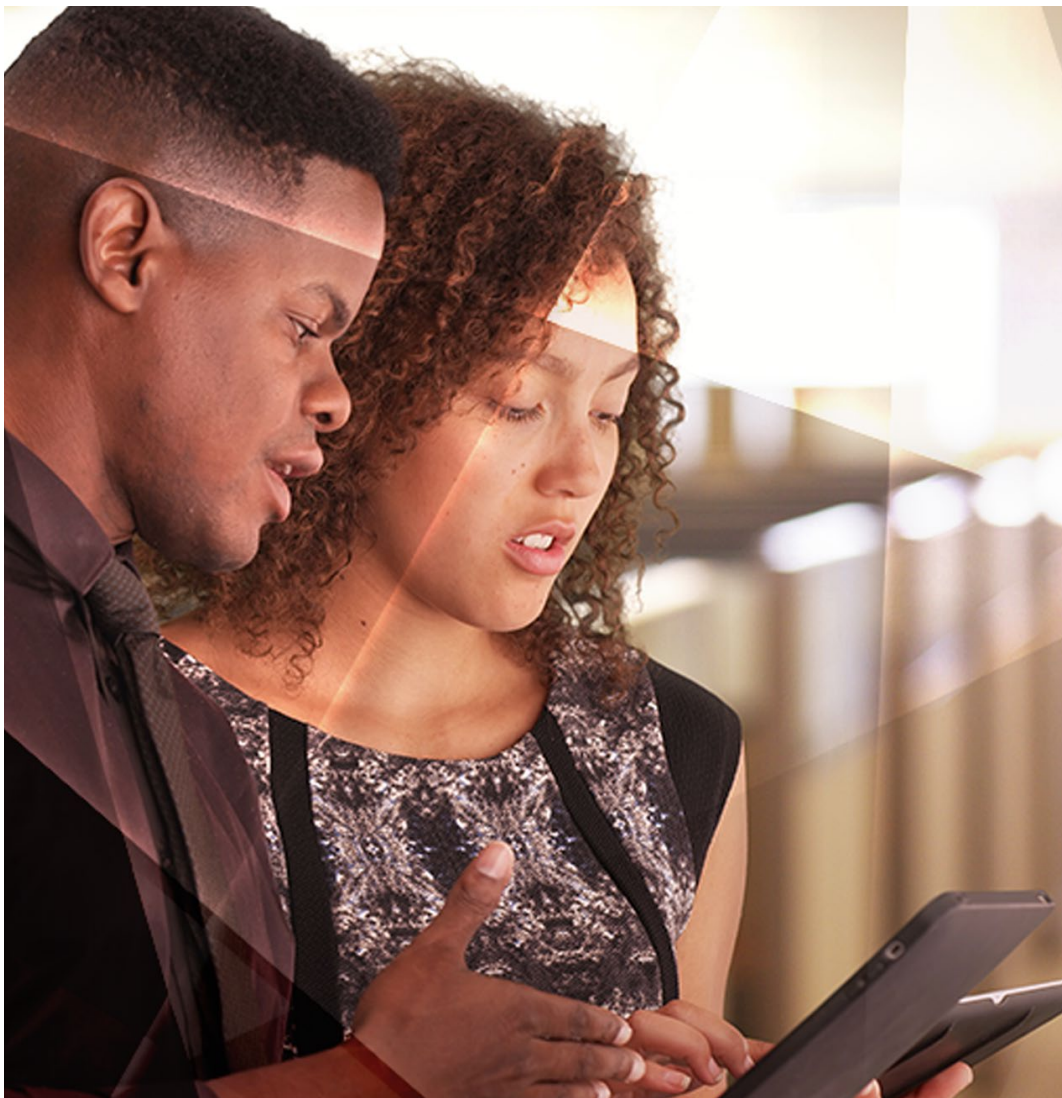


- Small 37%
- Medium 49%
- Large 61%
- WMAE 68%

Companies, by size, that do not currently have employer branding guidelines, but plan to develop them (%)

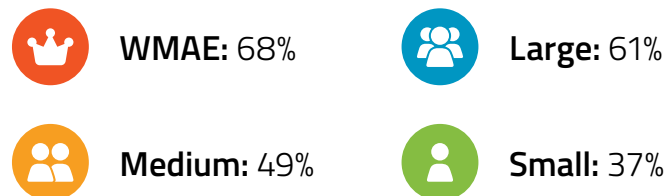


- Small 41%
- Medium 57%
- Large 64%
- WMAE 76%

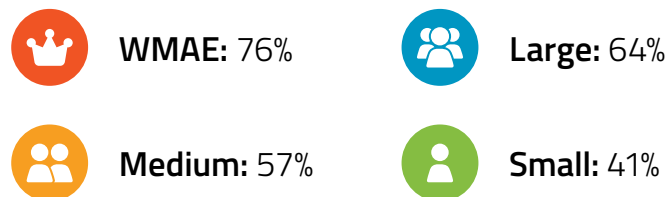


CREATIVE IDENTITY & VISUAL EXPRESSION

Employer branding guidelines are currently in place for the following percent of companies:



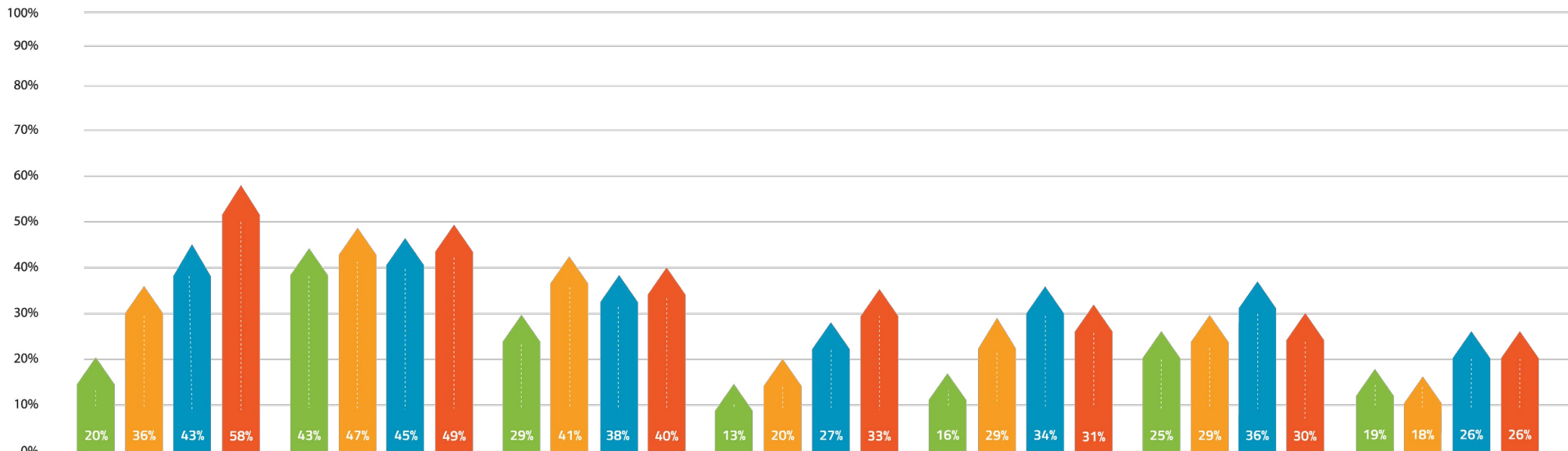
And of the remaining companies, this percent are planning to develop employer brand guidelines:



5 SEGMENTATION SPELLS SUCCESS

Targeted employer brand communication

● Small ● Medium ● Large ● WMAE



We have developed different campaigns for graduates and experienced hires



We focus on maintaining as much consistency as possible across all target groups



We tailor our communications to different functions/ job families



We have developed different diversity campaigns



We tailor our communications to different countries



We tailor our communications to different regions



We have one global communication strategy

Among the world's leading employers, the tide has turned from being primarily focused on global brand consistency, to strategies which seek to balance sufficient consistency with greater focus on talent segmentation and local tailoring. Tailoring employer brand activities to different target audiences has risen to one of the top three priority objectives for these leading employers (up from sixth place last year). 60% of these top employers now claim to have developed target profiles for different talent segments, significantly up from 2016, and they are also more likely to be developing targeted campaigns for these different talent groups.

Segmentation 101:

Candidates can be segmented by the communication channel where they're most likely to be reached, specific demographics, assessment results, work values, motivations and more!



Communication channel



Work values



Motivations



Assessment results



Specific demographics

"Taking the time to understand the differences between your target audiences is critical to success. It's important for employer brands to be consistent, but they also need to be flexible enough to enable recruiters to engage in the most relevant and powerful way with each target group."

– Michael Durney

President and CEO of DHI Group, Inc.

6 SHIFTING CHANNEL PREFERENCES



“The main takeaway here is that social media has become a mainstay of recruitment marketing among companies of all sizes. If you’re not investing in your social media presence, you’re likely to fall behind your talent competitors.”

– James Barraclough

**Head of Activation EMEA
at Universum**

As with 2016, the most common focus for increased employer brand marketing investment with every company, no matter their size is social media. Employers cited social channels as their biggest bet for 2017. This is over and above professional networks, which are still attracting increased investment, but at a lower level than last year among leading employers.

When evaluating the channels companies use to build their employer brand reputation with students, social media leads the way for the WMAE and companies of all sizes, except for medium sized companies who place it second only to their website. Notably, the WMAE focus on campus recruiting far more than their non-WMAE counterparts.

Employee Referrals

Employee referral continues to see a significant bump in increased investment this year with 56% of the WMAE reporting the intention to increase their spend. In the same vein, promoting employer advocacy has become increasingly more important to companies as a primary employer brand objective, increasing from 30% to 41% among the WMAE. Following the lead of WMAE, 34% of large, 30% of medium and 20% of small businesses are making employee advocacy the main priority of their employer brand communication.

“Traditional media like direct mailing, student publications and general print advertising are registering the smallest net increases in investment.”

– George McFerran

**EVP Product
& Marketing,
DHI Group, Inc.**

Spending Trends

When it comes to the expectation of recruitment channel spend, there is net increase in every category, regardless of business size and the WMAE classification. Organizations are spending more when it comes to recruiting, and the greatest increases are seen in areas that offer great employer brand building opportunities (for example, social media, visual content and online presence). These channels work in conjunction with the more traditional recruiting resources and tools, like recruiters, job boards and mailers. Although traditional media are receiving less attention from employers it is worth mentioning that these channels still appear to be seeing a net increase in investment overall, showing that most companies are continuing to combine new innovative approaches with more traditional tactics.

Top 5 Channels WMAE are Increasing Spend for in 2017:



Social Networks



Employer/Career Site



Employee Referral



Digital Advertising



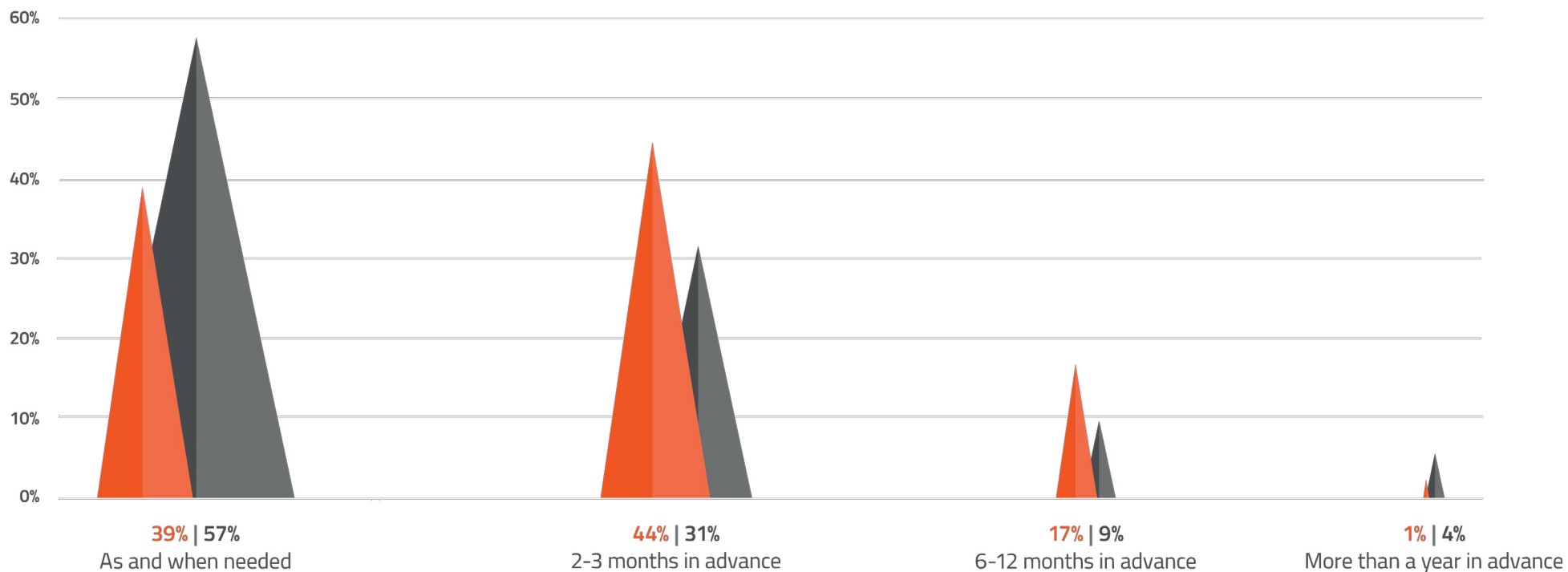
Professional Networks

7 GETTING AHEAD OF THE GAME

How far in advance do you tend to plan the content for social media channels?

● WMAE

● Non-WMAE



Using social media for employer brand communication requires strategic planning. The majority of the World’s Most Attractive Employers (44%) plan social media content two to three months in advance, while the majority of the non-WMAE post social media content as and when needed. A mixture of both is recommended, as a strong employer brand using social media should reflect both longer term strategic planning, as well responsiveness to events as they arise.

Guidance on Social Media Planning

Employers’ social media strategies are not only becoming key to employer brand building, but also fast becoming one of the primary channels for sourcing and connecting with the best talent. Successful companies are adopting increasingly tailored and sophisticated content strategies for different social channels, highlighting the importance of implementing social recruiting into your employer branding strategies.

“An employer branding strategy designed for Twitter might not be successful on Facebook, and vice versa. The content needs to be tailored to suit the nature of the channel as well as the user base.”

– Claudia Tattanelli, **Universum**

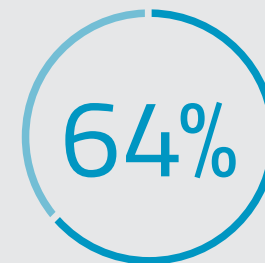
People have different expectations when it comes to the content featured on different social media channels.

Fact:

69% of WMAE and 64% of large companies are planning to increase their investments in social networks.



WMAE








Large



For which of the following communication channels have you developed employer brand content?



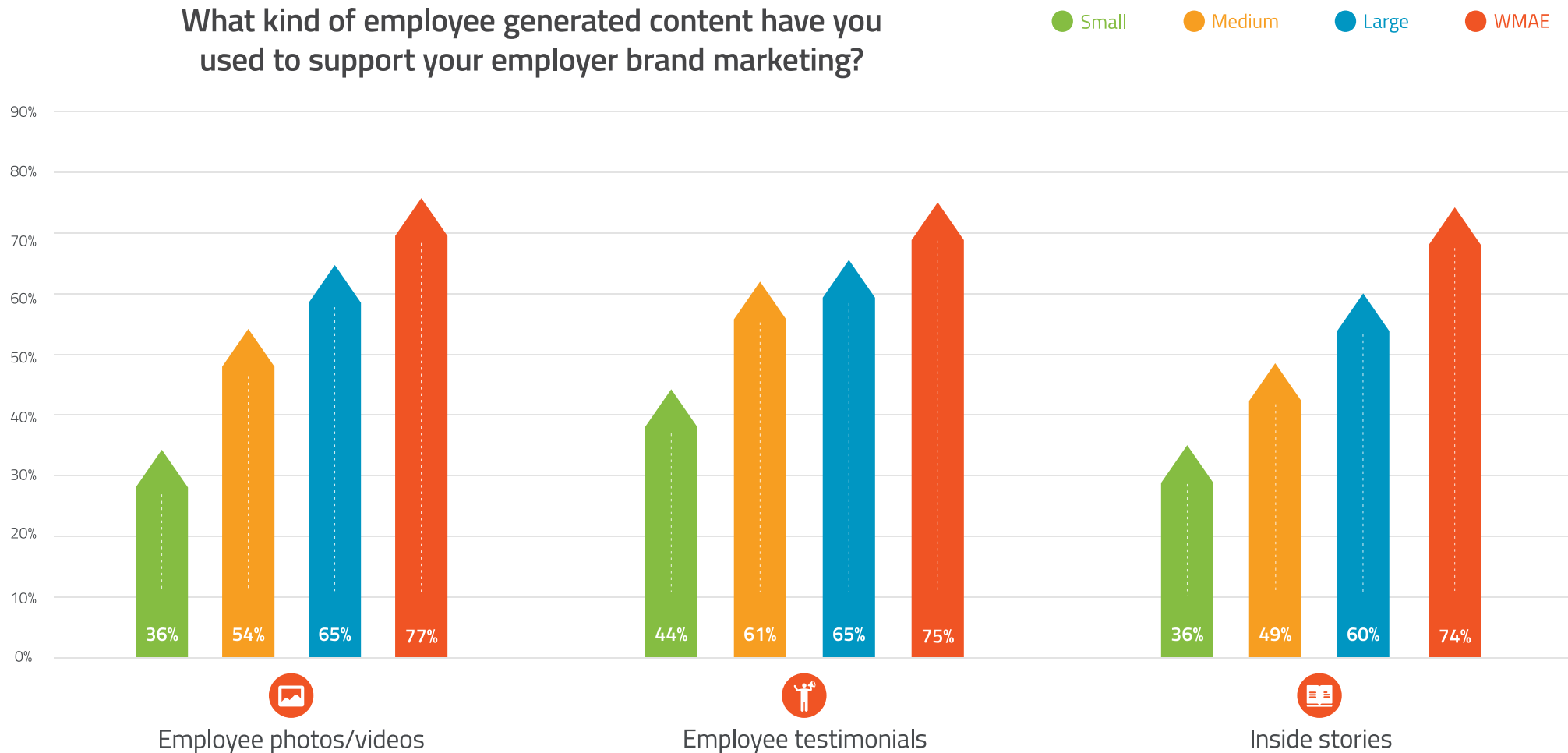
Map Key

-  Employer websites/career sites
-  Facebook
-  LinkedIn
-  VKontakte
-  WeChat

-  USA
-  Brazil
-  South Africa
-  Australia
-  UK
-  Russia
-  China

8 PUTTING PEOPLE IN THE PICTURE

What kind of employee generated content have you used to support your employer brand marketing?



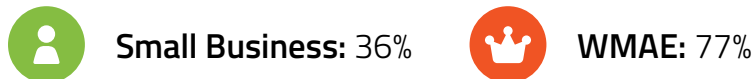
The most notable trend in content marketing is the growing focus on visual content, with employee photos and videos moving to first place in terms of the most deployed employer brand content among the WMAE, ahead of employee testimonials and inside stories.

Organic Employer Branding through Visual Content

While large companies are able to outspend smaller employers when it comes to digital advertising and other more conventional forms of recruitment messaging, there is a significant opportunity for small and medium companies to make greater use of employee generated content.

Employee Generated Content (Small Businesses vs. the WMAE):

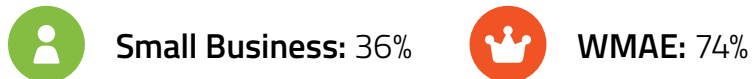
Photos and Videos:



Testimonials:



Inside Stories:



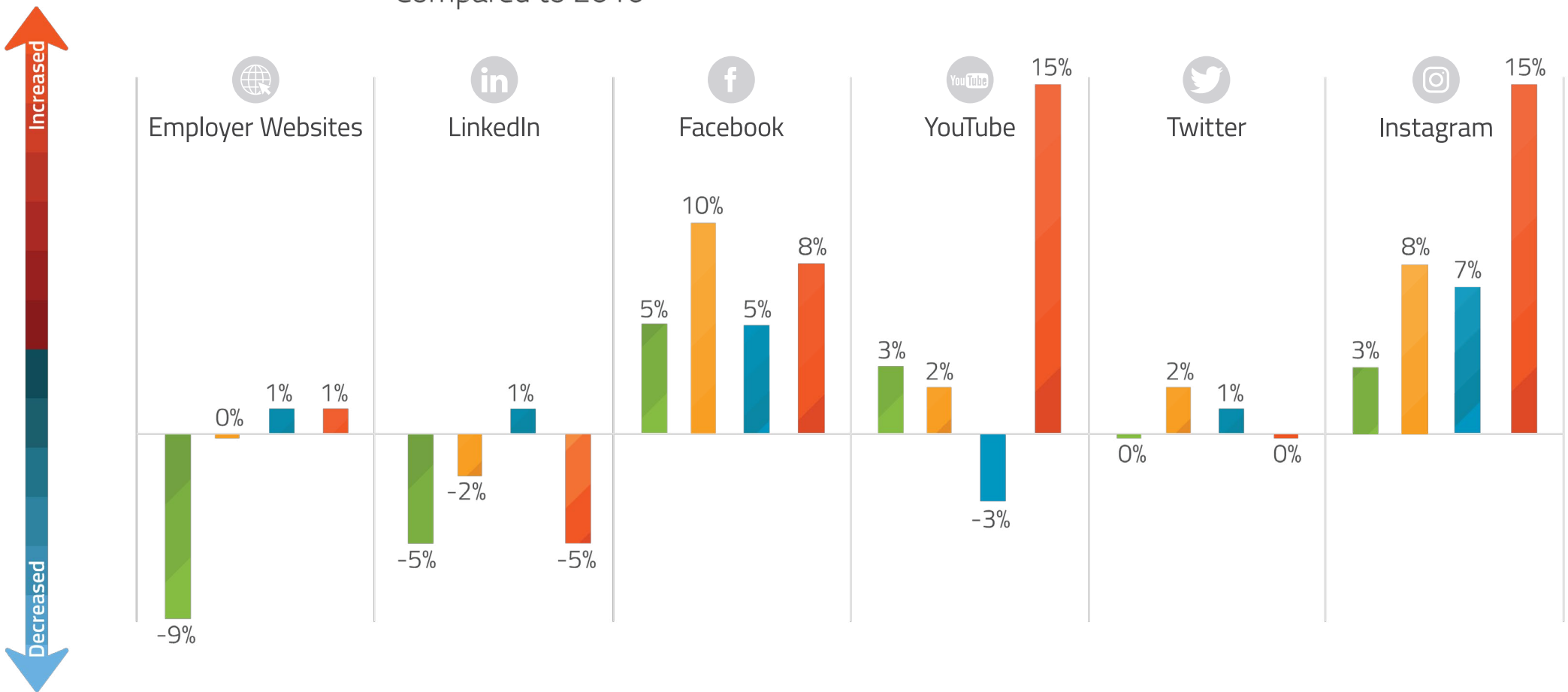
“While there is currently a significant gap when it comes to the percentage of small companies deploying employee generated content compared to the WMAE, we expect to see this close over the coming years as more companies realize the cost benefits and value of employee advocacy in building their employer brands.”

– Richard Mosley

**Global Vice President
of Strategy at Universum**

The Difference in Developed Content Compared to 2016

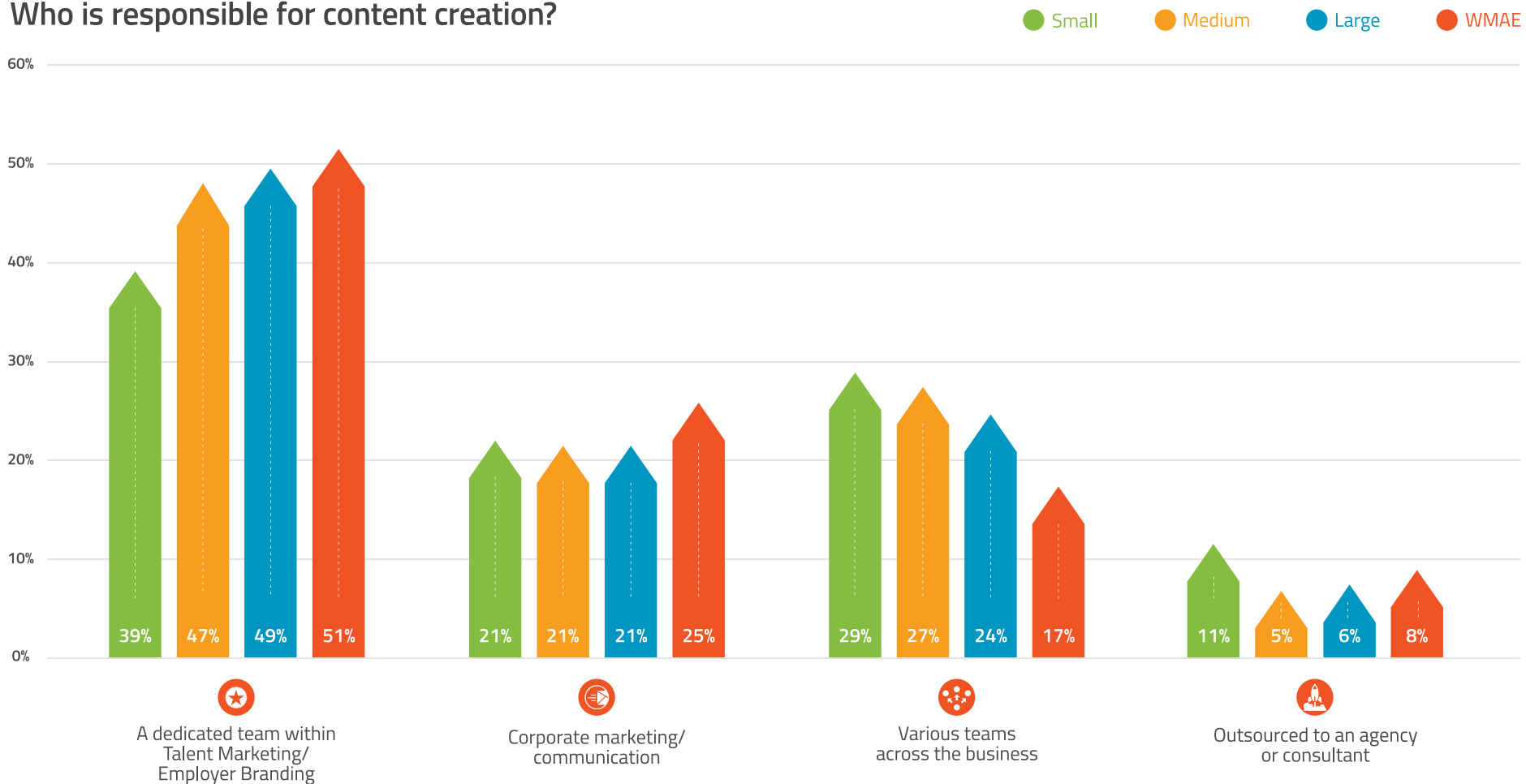
● Small ● Medium ● Large ● WMAE



YouTube and Instagram were both big winners this year, with leading employers usage of YouTube and Instagram having both seen a 15% increase compared to 2016, followed by Facebook at 8%.

9 SHARING THE LOAD

Who is responsible for content creation?



"Most employers now recognize that they cannot simply outsource their employer brand to an outside party because they need to build their brand from the inside out."

– George McFerran
EVP Product
& Marketing,
DHI Group, Inc.

In 2017, we have witnessed a shift from dedicated employer brand social marketing resources to a shared corporate communication responsibility for employer brand content creation. The biggest shift is among the WMAE.




WMAE: up 13%

Who Owns Employer Branding Strategy?

The least popular choice among all employers is to outsource responsibility for content creation to an outside agency. Given the increasing shift from 'manufactured' communication content to authentic, employee generated content, this is entirely understandable.



10 DELIVERING ON THE PROMISE

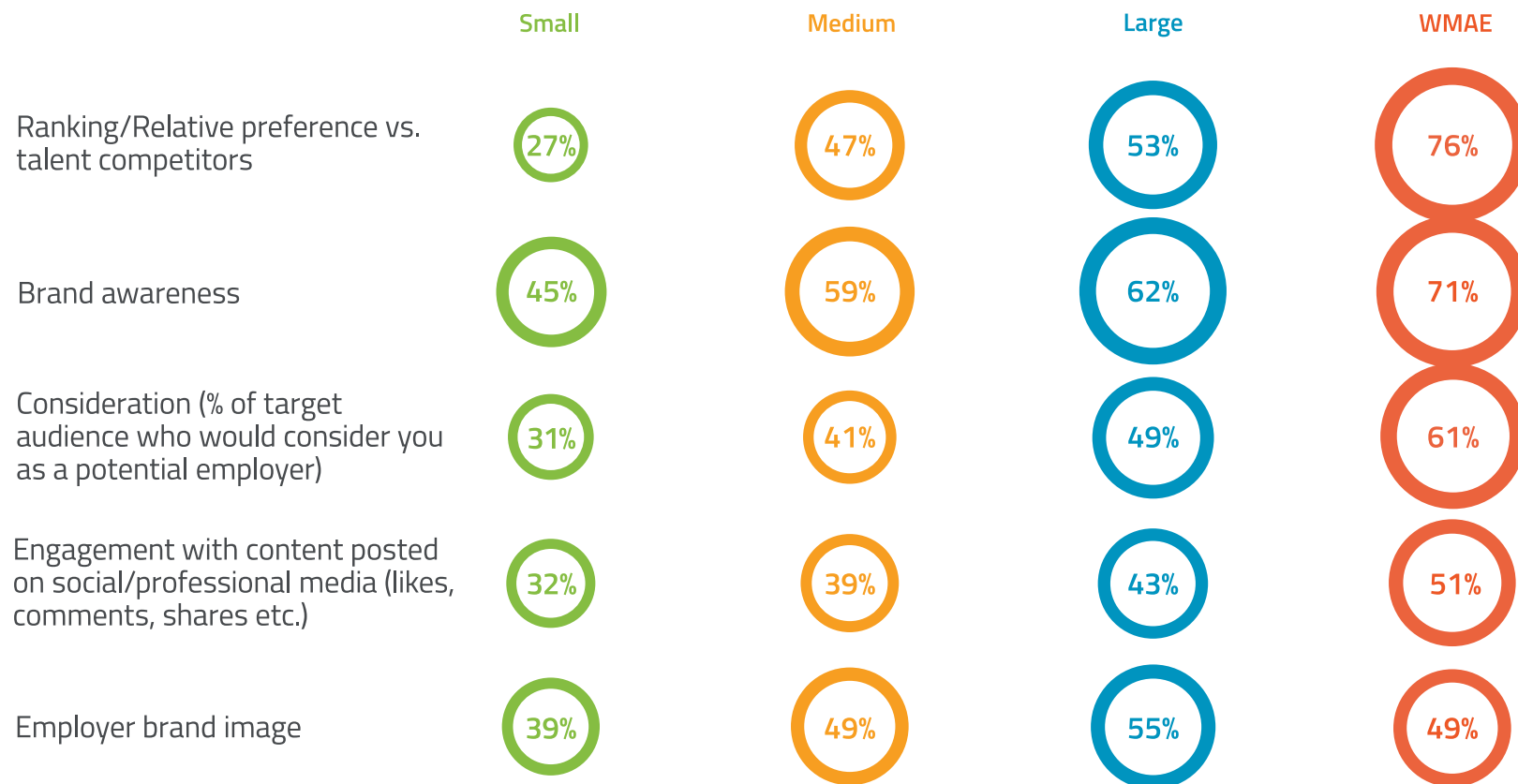


Align leadership behaviors to the employer brand.

The majority of organizations are focusing on the extension of their employer brand strategy to candidate management. Since 2016, the biggest increase in focus from a people management perspective, has been in aligning leadership behaviors to the employer brand. In other words, establishing follow-through in employment practices as they relate to the employer brand promise and EVP.

11 INCREASING FOCUS ON MEASUREMENT

Which of the following do you use to measure the external status of your employer brand?



Among the medium to large companies in our survey, the average number of measures deployed has increased since 2016, reflecting the wider uptake of data-driven analysis in HR. The most significant increase has been in the measurement of employer brand image (up 10 percentage points since 2016 among large companies and up 7% among medium-sized companies). This represents an important step forward in sophistication, since brand image is the more complex yet vital diagnostic measure necessary to understanding the journey from awareness to consideration and brand preference.

To What Extent Are Employer Brand Decisions Data-Driven?

The majority of the WMAE and large companies state they frequently make employer brand decisions based on data, while the majority of medium and small companies state they only make data-driven employer brand decisions occasionally. This likely reflects the greater need for data analysis in larger, more complex organizations; the deployment of more sophisticated HR systems; and the wider prevalence of specialist data analysts.

A majority of companies state their primary objective and measure is brand awareness, followed by brand image. For the WMAE, brand awareness is less of an issue, leaving the main focus to be placed on ranking/relative preference vs. talent competitors (76% of the WMAE measure this but only 27% of small companies do).



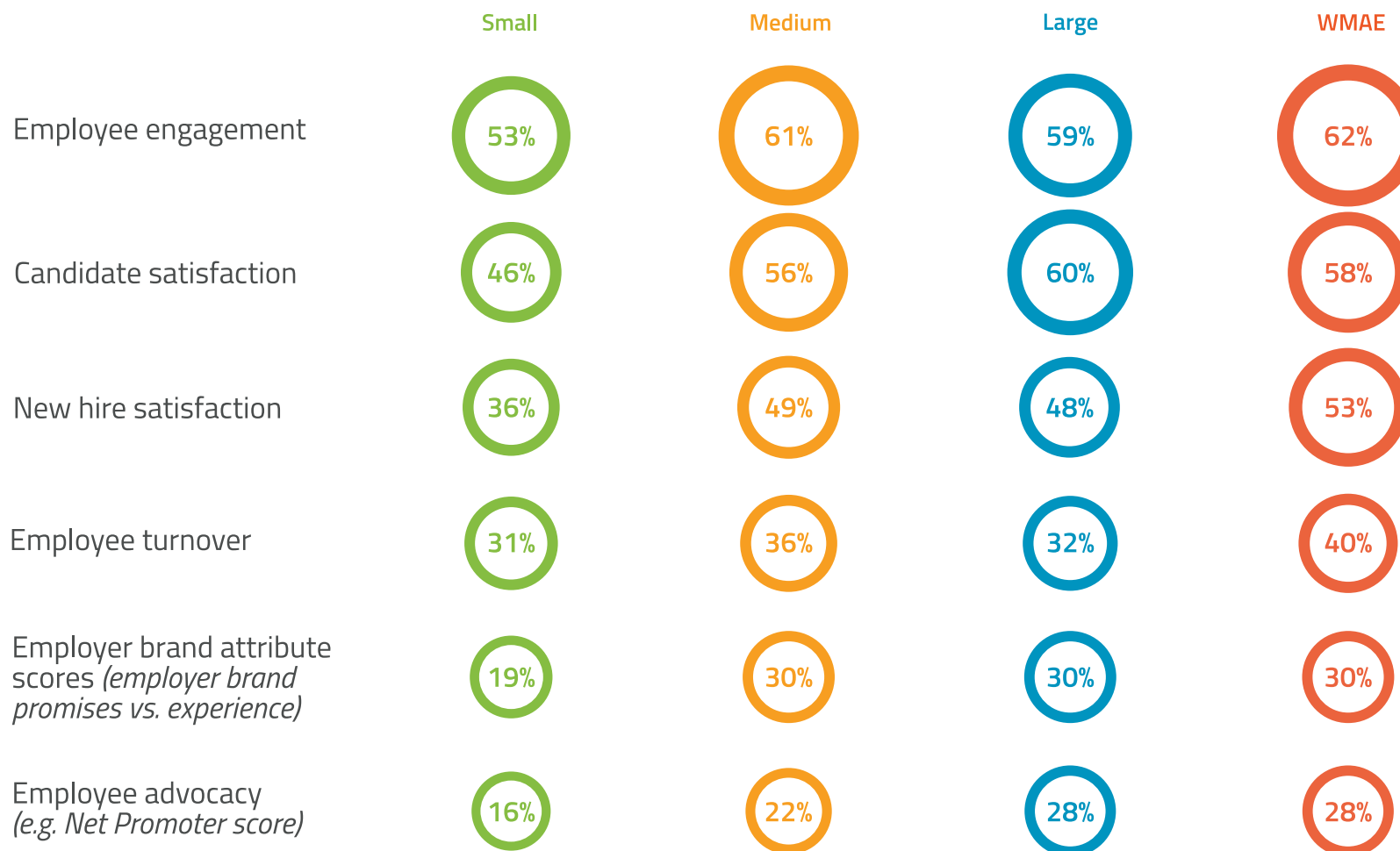
How the WMAE Measure the External Status of their Employer Brands:

- ✓ Ranking/Relative preference vs. talent competitors
- ✓ Brand awareness
- ✓ Consideration (% of target audience who would consider)
- ✓ Engagement with content posted in social/professional media (likes, comments, shares etc.)
- ✓ Employer brand image

What Companies Use to Measure the Quality of Employer Brand Experience:

- ✓ Employee engagement
- ✓ Candidate satisfaction
- ✓ New hire satisfaction
- ✓ Employee turnover
- ✓ Employer brand attribute scores (employer brand promises vs. experience)
- ✓ Employee advocacy (e.g. net promoter score)

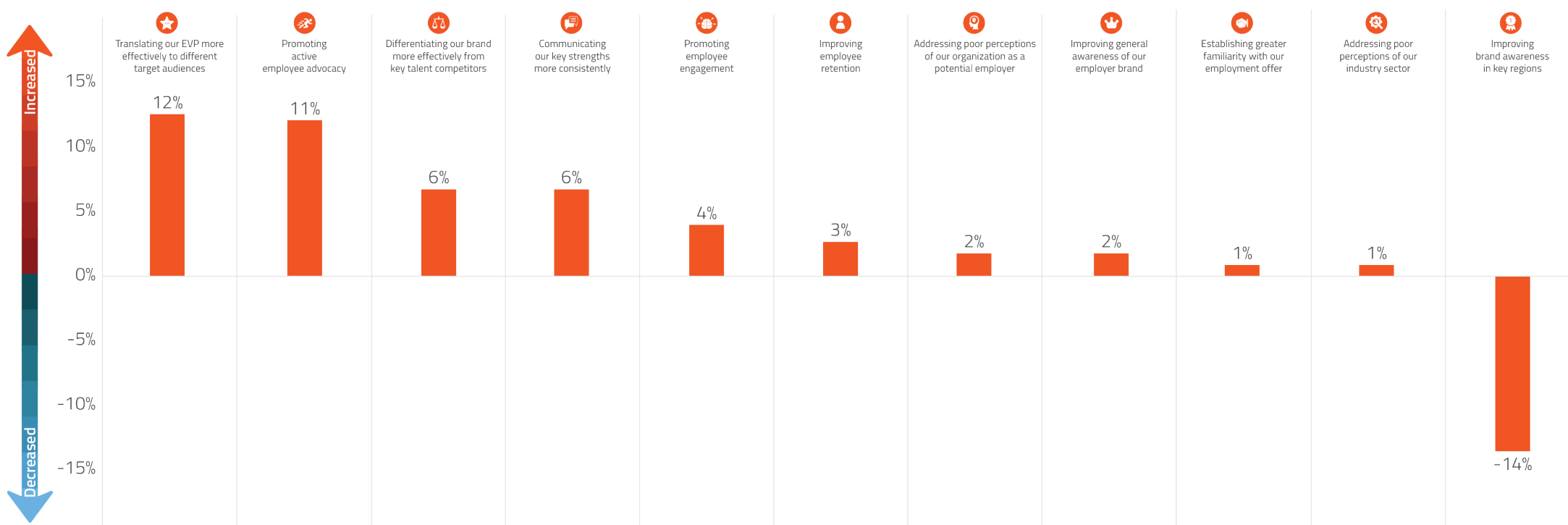
Which of the following do you use to measure the quality of your employer brand experience?



DIFFERENCE IN EMPLOYER BRANDING OBJECTIVES

In order to understand the direction the WMAE are taking, we compared their employer branding objectives in 2017 to their objectives from 2016 (highlighting the percentage points difference):

Which of the following best describe your primary employer brand communication objectives?
Compared to 2016





CONCLUSION

One common trend resounds through our findings: the larger the company, the more value placed on employer branding. Other research shows that small businesses have less of a problem attracting new talent, largely due to the [Millennial generation's](#) interest and positive perception of startups and small business employers. Lower interest in larger corporations may come from Millennials preferring a [better work-life balance](#) over high-paying salaries. This characteristic of the emerging workforce has placed pressure on the larger employers to become increasingly strategic in employer branding.

Percentage points difference:

- ✓ Translating our EVP more effectively to different target audiences (+12%)
- ✓ Promoting active employee advocacy (+11%)
- ✓ Differentiating our brand more effectively from key talent competitors (+6%)
- ✓ Communicating our key strengths more consistently (+6%)
- ✓ Improving general awareness of our employer brand (+2%)

The increase in the WMAE focus on the above objectives has shed light on the strategic direction of leading employers with greater emphasis being placed on target marketing and employee advocacy. This reflects the overall shift in employer brand communication from advertising to social content marketing.

*“This shouldn’t come as news to anyone, but **recent graduates love companies** that understand that they don’t want to be stuck in an office cubicle for 5 days a week. Companies that offer flexwork or give them options to work from home are strong contenders when it comes to graduates choosing a company to work for. **Fidelity Investments** reports that most young professionals would be willing to take an average pay cut of about \$7,600 for a better quality of work life.”*

– Jonas Barck, **Chief Marketing Officer at Universum**

“Graduates feel more confident in showcasing their skills without being lost in a sea of employees like they might at a larger company.”

– George McFerran, **Senior Vice President, Customer Engagement at DHI Group, Inc.**

The growing appeal of startups and small company culture has pushed larger companies to adopt the practice and increase their focus on employer branding to stay competitive amongst young talent.

“The deviation brings advantages to employees and employers alike, as employees who fit a company’s culture do tend to stay longer and see better satisfaction and productivity.”

– Michael Durney, **President and CEO of DHI Group, Inc.**

All in all, the development and maintenance of a strong employer brand has become best practice for any size of organization. The journey a company takes in that pursuit is where we see the greatest differences. Observing the key components of the World’s Most Attractive Employers can help inform the best direction for your own strategy, so long as your employer branding decisions are rooted in your own unique values and company culture.





About Universum

Universum is the global leader in employer branding. During our 25+ years we have established ourselves in 60 markets throughout the globe and our diverse workforce is physically present in 20 countries. Our services include actionable research, EVP development, strategic planning, data driven communication and social media solutions for talent branding, sourcing and analytics. We are a trusted partner to over 1,700 clients, including many Fortune 500 companies, as well as global media partners that publish our annual rankings and trend reports. We work with over 2000 universities, alumni groups, and professional organizations to gather insights from students and professionals. On an annual basis Universum surveys over 1,500,000 students and professionals worldwide in order to advise employers on how to attract and retain talent that fits their culture and purpose.

About DHI Group, Inc.

DHI Group, Inc. (NYSE: DHX) is a leading provider of data, insights and employment connections through our specialized services for professional communities including technology and security clearance, financial services, energy, healthcare and hospitality. Our mission is to empower professionals and organizations to compete and win through expert insights and relevant employment connections. Employers and recruiters use our websites and services to source and hire the most qualified professionals in select and highly-skilled occupations, while professionals use our websites and services to find the best employment opportunities in and the most timely news and information about their respective areas of expertise. For more than 25 years, we have built our company on providing employers and recruiters with efficient access to high-quality, unique professional communities, and offering the professionals in those communities access to highly-relevant career opportunities, news, tools and information. Today, we serve multiple markets located throughout North America, Europe, the Middle East and the Asia Pacific region.

“Best practices can and should be followed, but not copied wholesale, since the most effective employer branding strategies are also authentically unique to the companies that develop them.

– Richard Mosley,
**Global Vice President
of Strategy at
Universum**