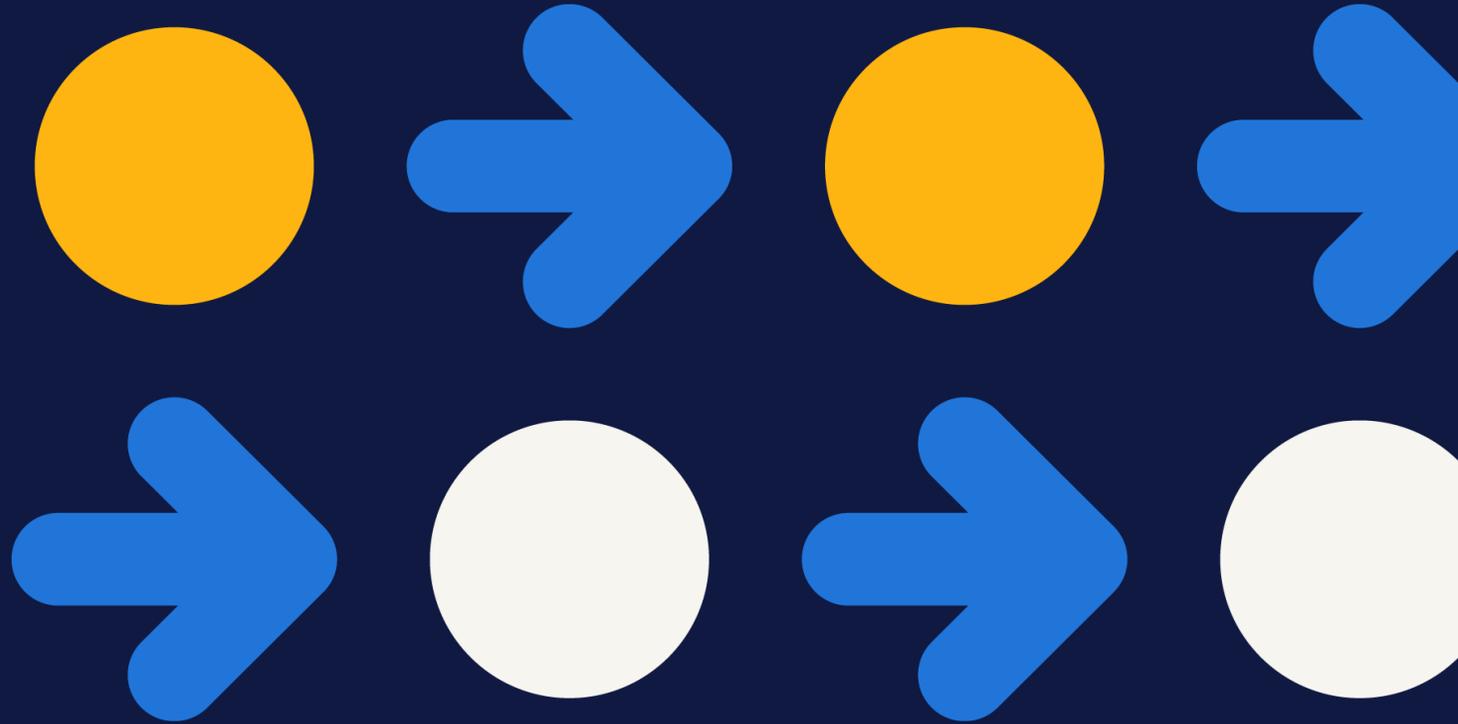


employer brand research 2021



russia.

 **randstad**
human forward.

ancor
discover perspective.

content.

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



what is the randstad employer brand research?

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



the employer brand roadmap.



why employer branding matters.



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

50%

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

96%

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

80%

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

why employer branding matters.

19%

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

1-2x

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

#1

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

76%

employees who experience a strong alignment between what their employer says about itself and their experience working there are more likely to recommend their employer as a place to work.⁹

52%

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



34 markets surveyed covering more than 80% of the global economy.

argentina
australia
austria
belgium
brazil
canada
china
czech republic
france
germany
greece
hong kong SAR
hungary
india
italy
japan
kazakhstan
luxembourg
malaysia
mexico
new zealand
norway
poland
portugal
romania
russia
singapore
spain
sweden
switzerland
the netherlands
uk
ukraine
usa



● markets surveyed

[click here](#) for detailed research methodology

worldwide

- over 190,000 respondents
- 6,493 companies surveyed

sample

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

country

- 13,842 respondents

fieldwork

- online interviews
- january 2021

length of interview

- 16 minutes



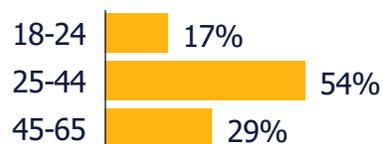
sample composition in russia

socio-demographics, employment status, region.

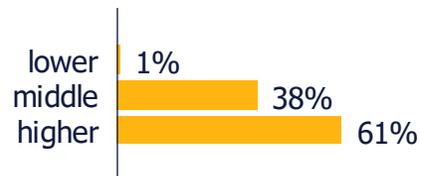
gender



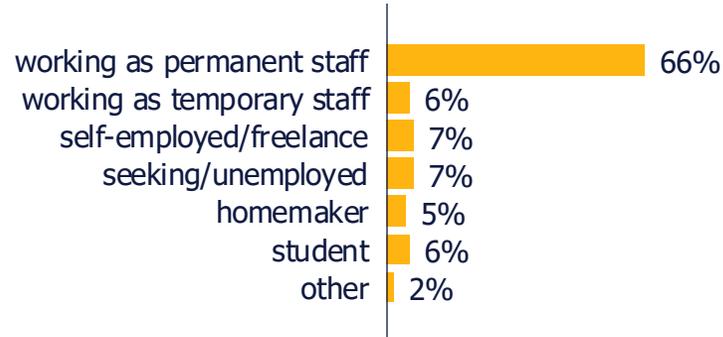
age



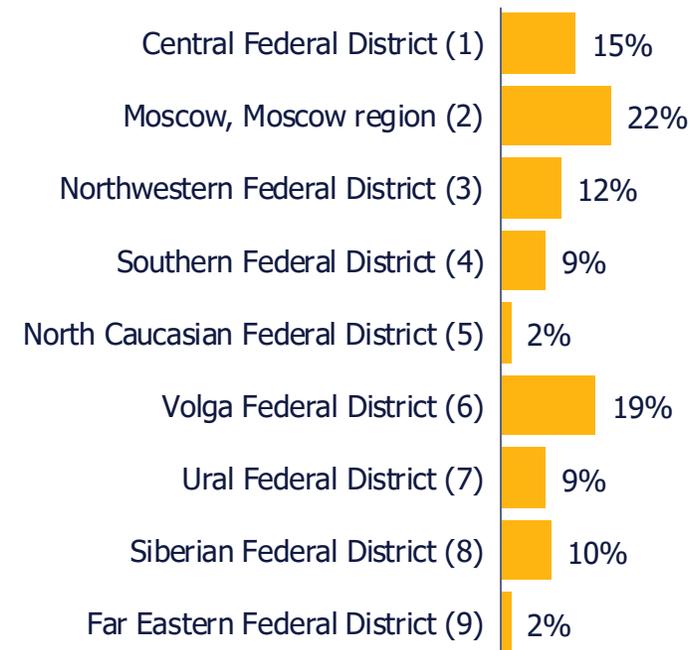
education



employment status



region



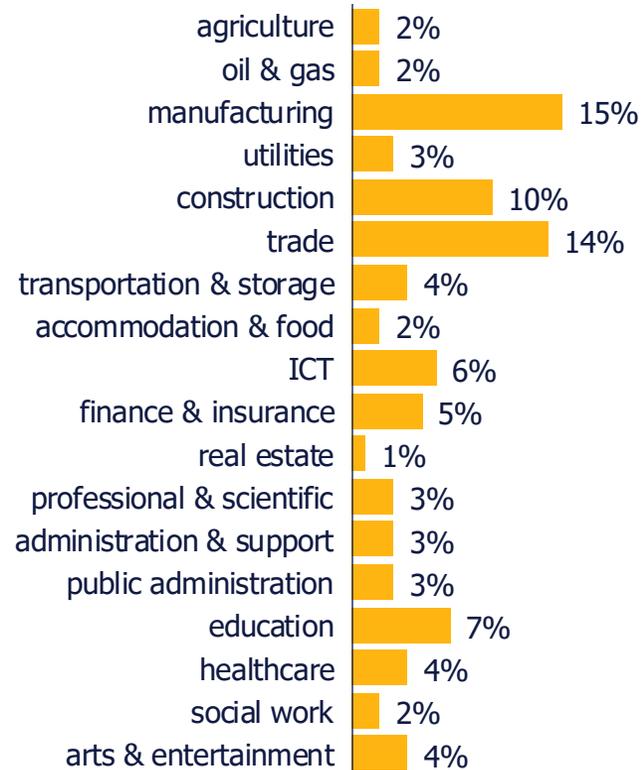
total sample: 13,842
fieldwork: january 2021



sample composition in russia

sector, function.

sector



function



base: currently employed (n=10,888)



russia

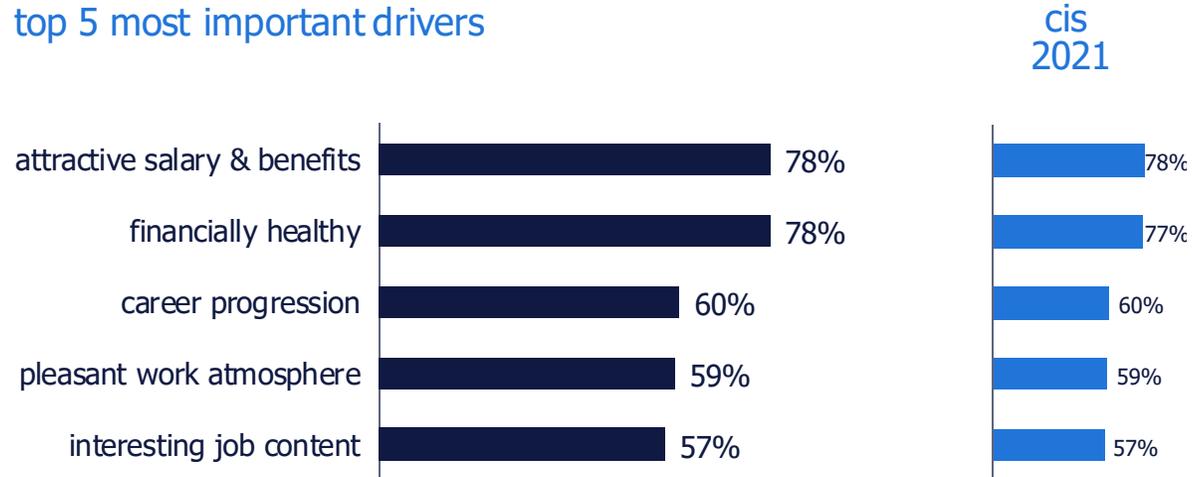
employer
attractiveness.



what potential employees want

the 5 most important drivers when choosing an employer.

top 5 most important drivers



russia top 5 drivers 2020

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

russia top 5 drivers 2019

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

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



what potential employees want when choosing an employer.

most important driver

salary & benefits financially healthy

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

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

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

employers' proposition

good reputation and financial health

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

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

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

recommended employer focus

career progression

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

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

what do potential employees want job collars in focus.

white-collar

41%

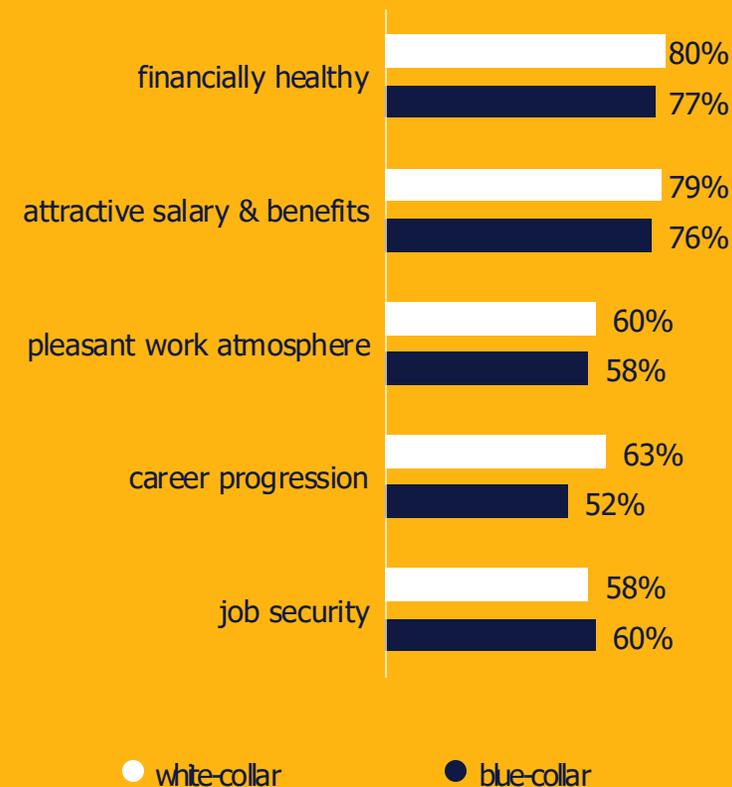
of white-collar employees consider the possibility to work remotely considerably more important than blue-collar workers (29%).

blue-collar

55%

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

most important attributes



job-switching behavior



in focus.

switching behavior finding another employer.

1 in 8 Russians changed employer

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

job portals – top channels to find a new employer

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



most important attributes switchers vs. stayers.

switchers

2021

12%

changed employer in the
past 6 months.

2021

17%

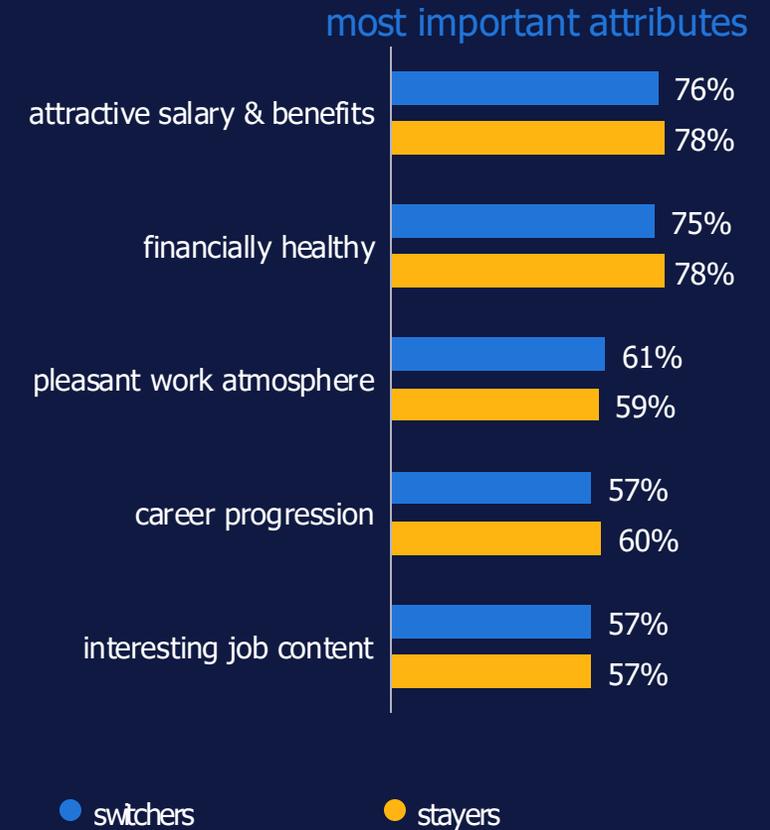
of those affected by
COVID changed employer
in the past 6 months.

stayers

2021

88%

stayed with their employer
in the past 6 months.



switching behavior job collars in focus.

white-collar intenders

20%

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

blue-collar switchers

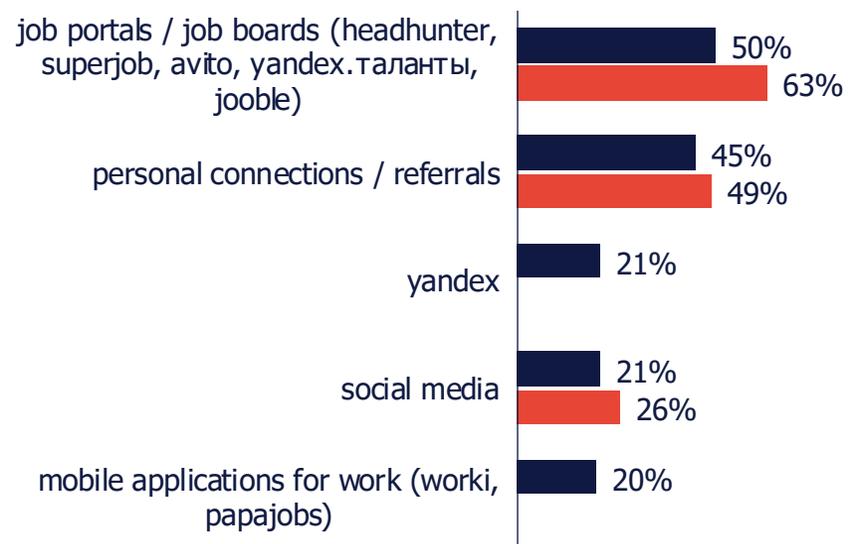
19%

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

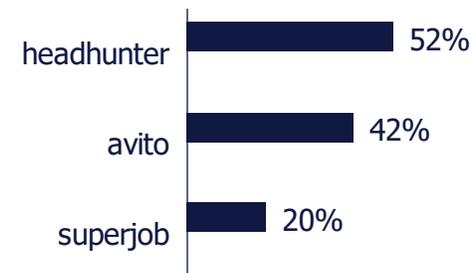


how do employees in russia find new job opportunities.

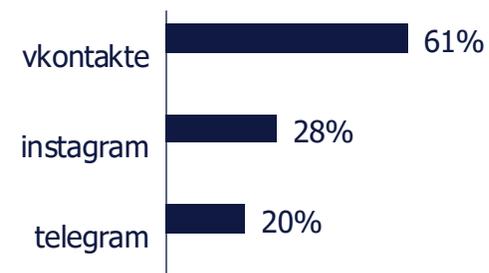
top 5 channels used to find new job opportunities



top 3 job portals



top 3 social media channels



● 2021 ● 2020

COVID-19

in focus.



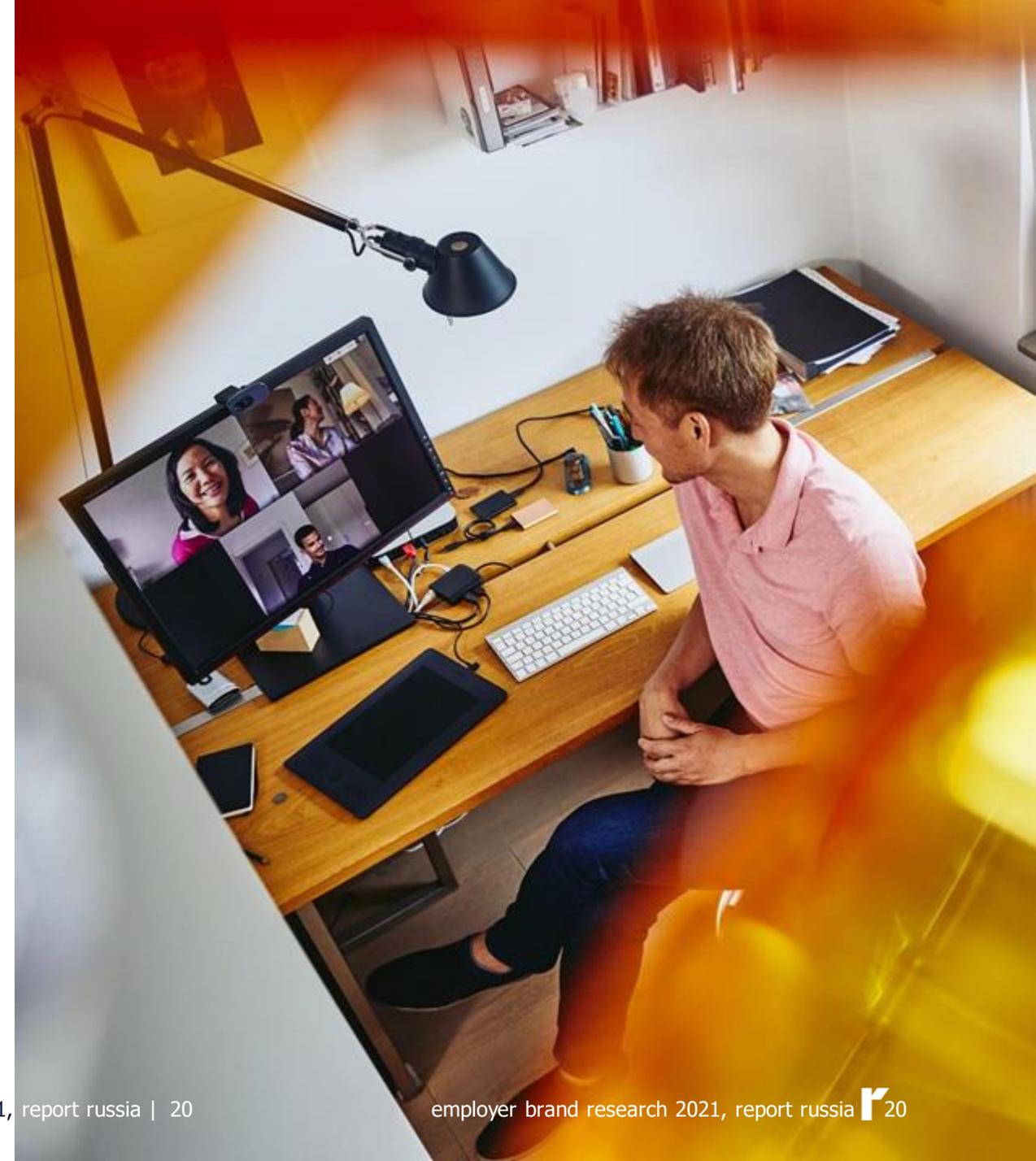
COVID-19 and its impact on the labor market.

possibility of working remotely relatively important

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

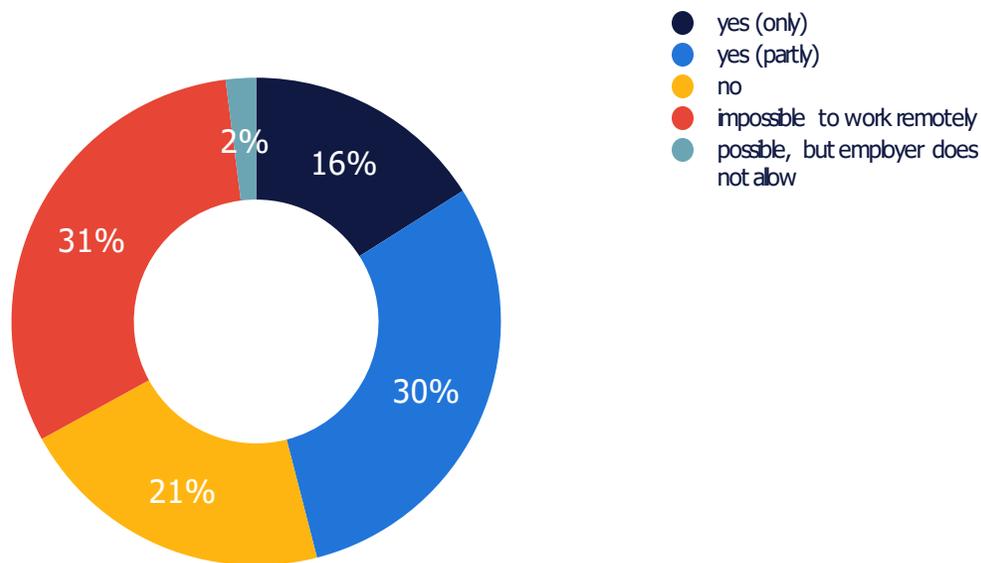
almost half of the employees (46%) started to work (more) remotely during the COVID-19 pandemic

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



remote working due to COVID-19.

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



russia

25%

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

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

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

cis

26%

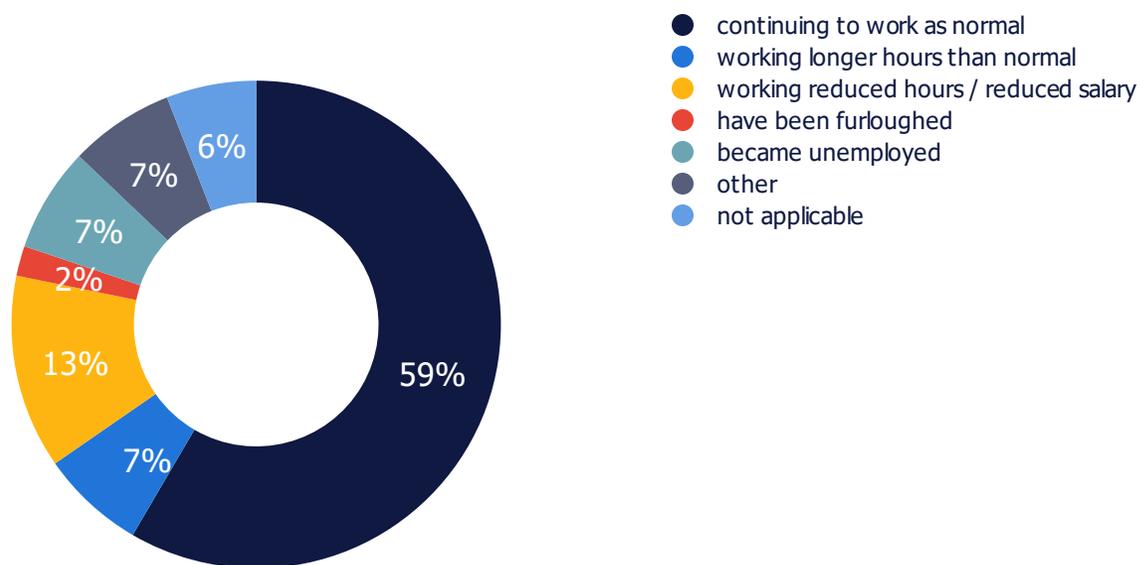
of the employees who said they worked remotely, do so out of their own decision.

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

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

employment situation changes due to COVID-19.

how COVID-19 changed one's employment situation



nearly four out of ten employees saw their employment situation change

36% of employees were either furloughed, became unemployed, worked more or fewer hours than usual or for other reasons saw their employment situation change due to COVID-19.

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

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

cis

36%

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

job loss fear in 2021 intention to switch.

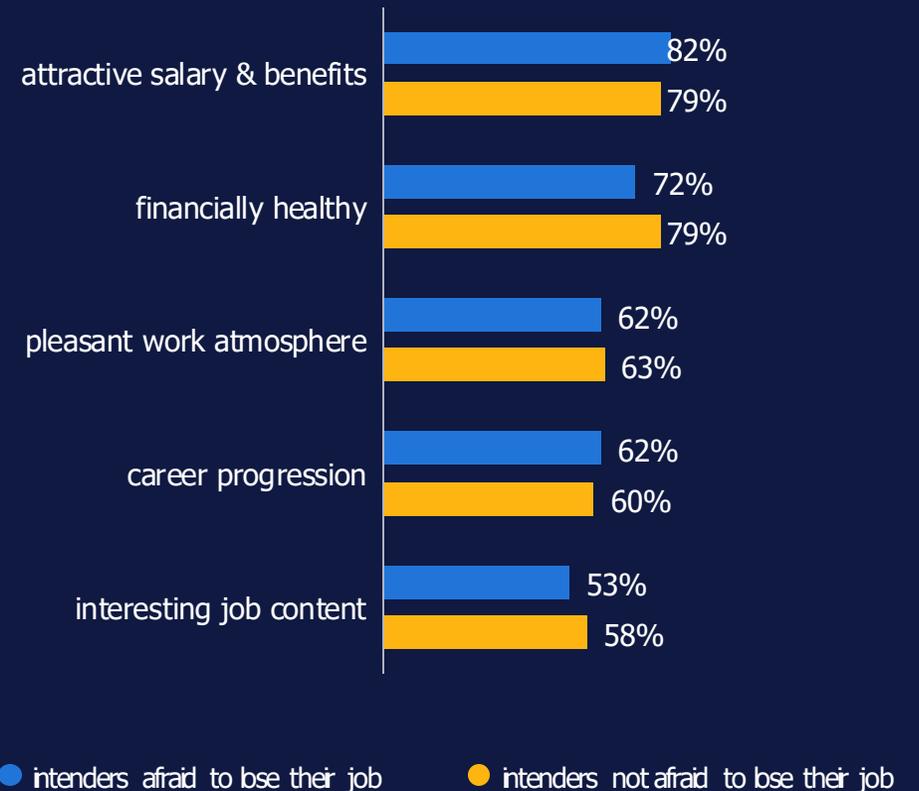
31%

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

14%

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

most important attributes



intention to switch amongst those affected by COVID-19.

intenders

2021

25%

plan to change employer in the next 6 months.

intenders

2021

39%

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

* next 6 months = first half of 2021. REBR2021 covers a period of 6 months (as opposed to 12 months in the past) in order to better capture the impact of COVID-19.

If one's employment situation has changed due to COVID-19, the intention to change to a new employer is considerably higher (39%) than those who just intend to change employers (25%).

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



job loss fear in 2021 due to COVID-19.

considerable fear of losing job

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

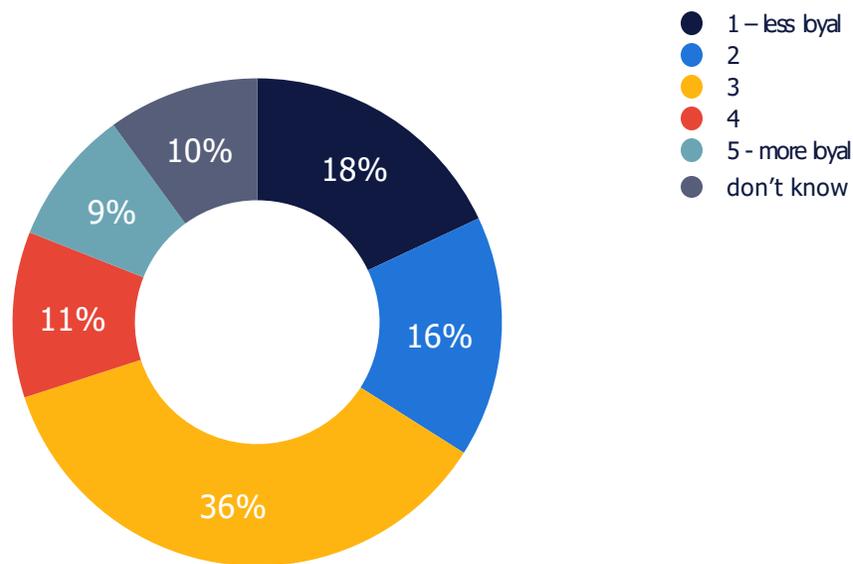
less fear of losing job in certain regions

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



loyalty towards employers during the pandemic.

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



works only remotely

21% of the employees who only work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

works partly remotely

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

obliged to work remotely

21% of the employees who were obliged by their employer / authorities to work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

own decision to work remotely

23% of the employees who decided on their own to work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

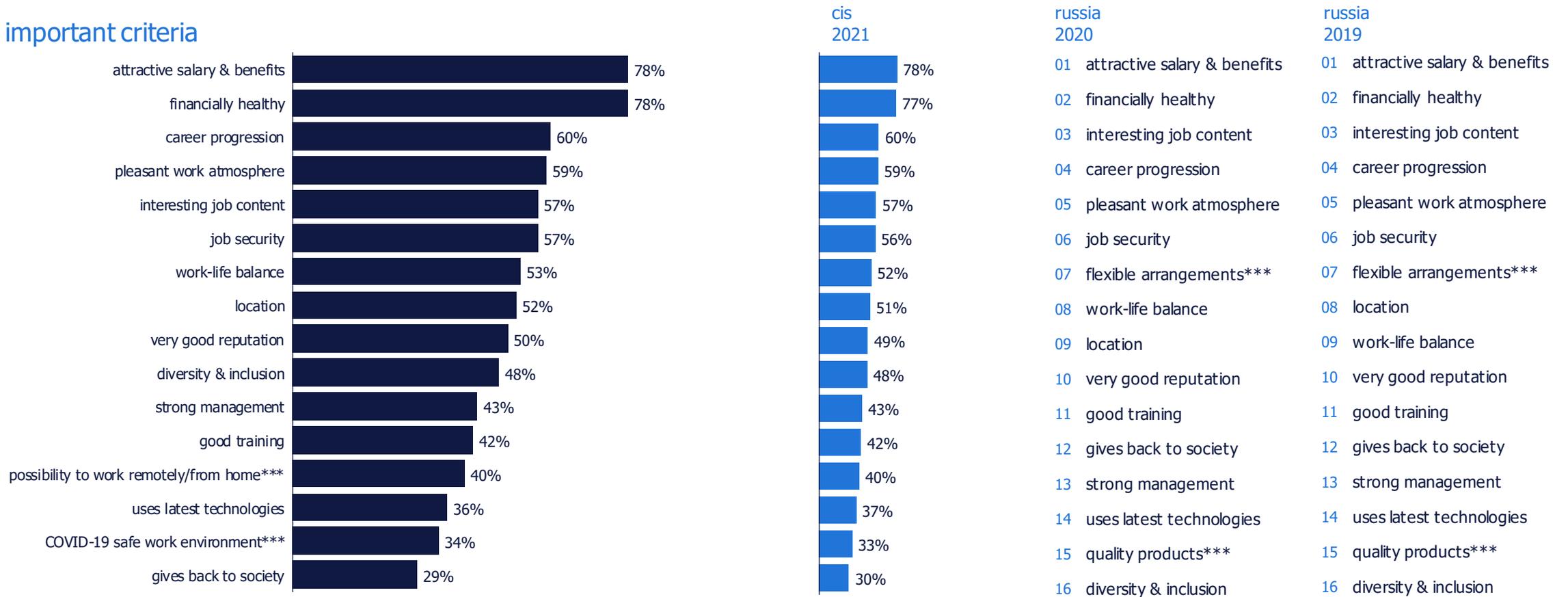
appendix 1

deep dive EVP drivers.



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

important criteria



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

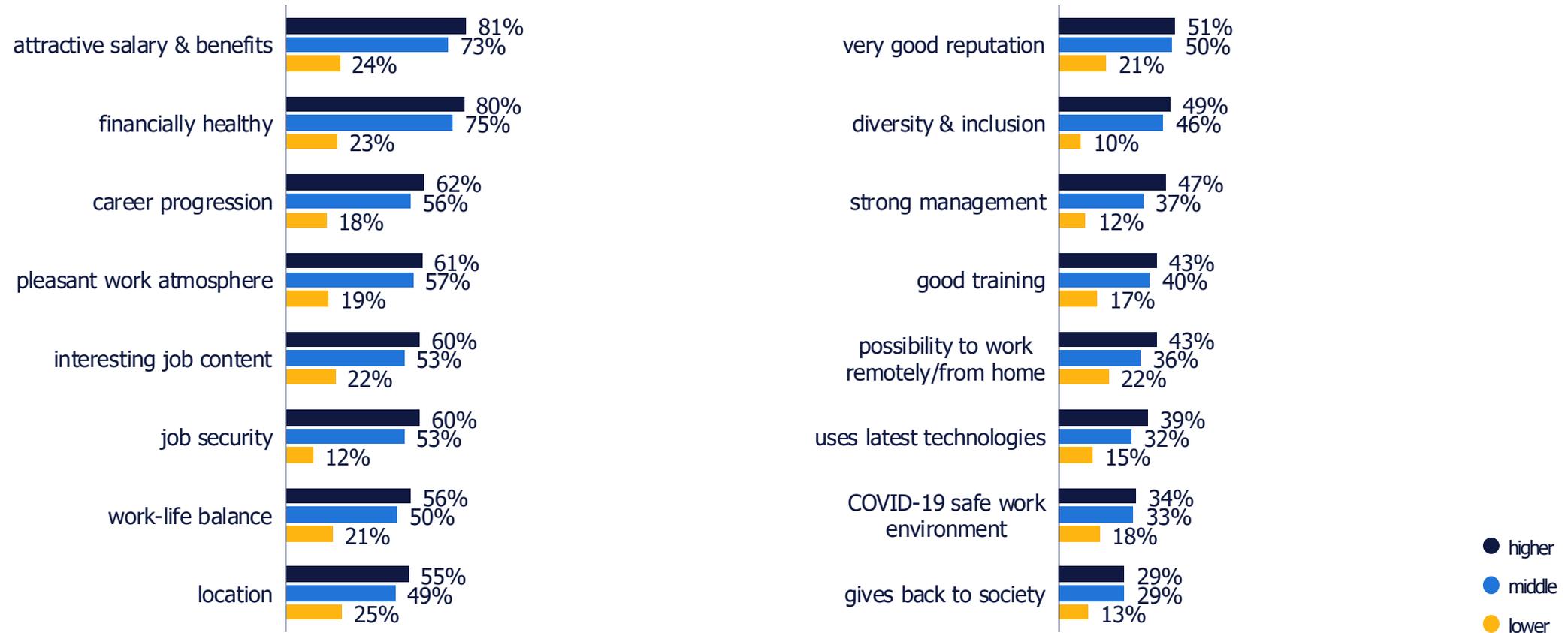
***only researched in 2021 / interrupted in 2021



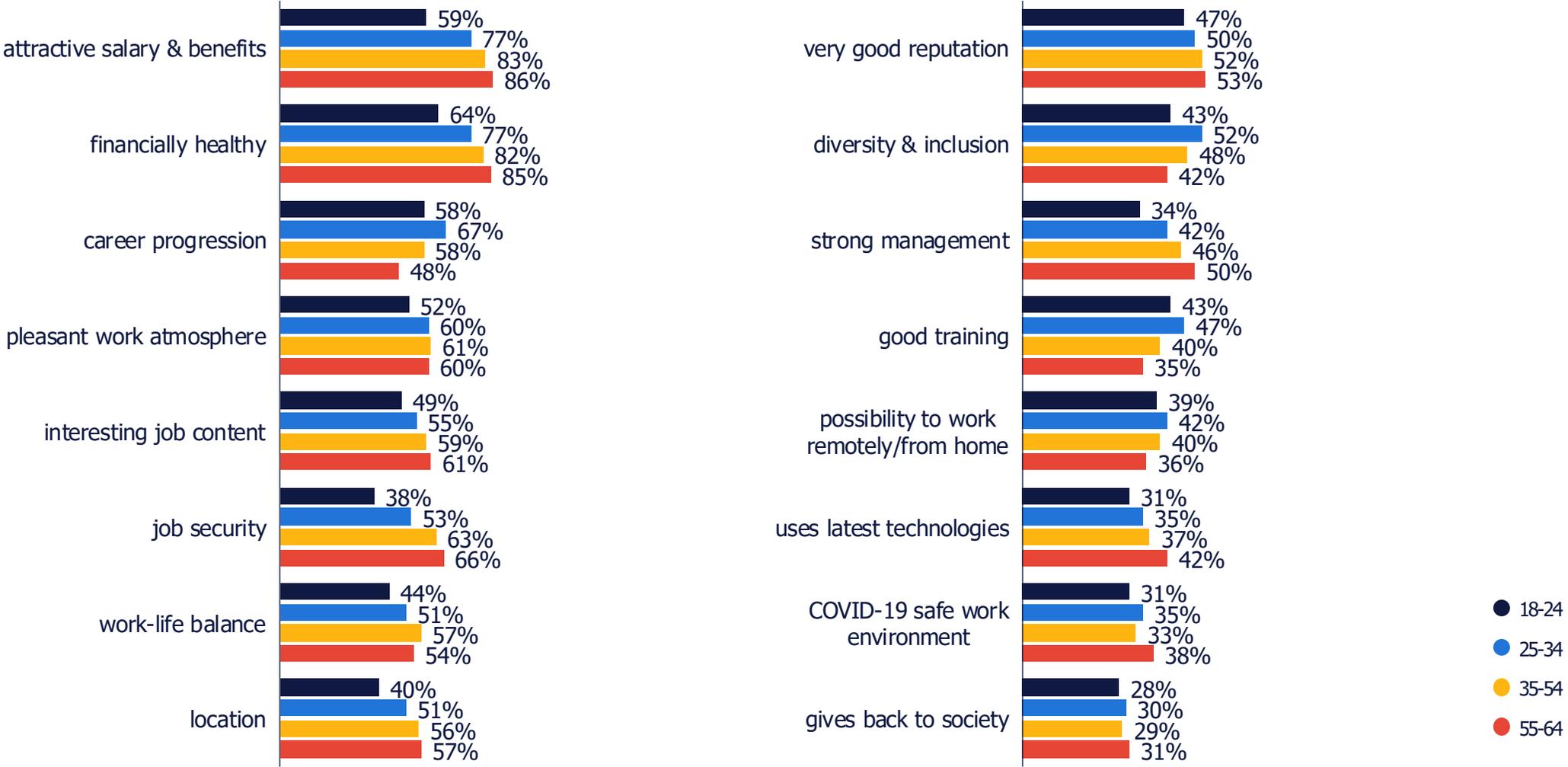
EVP driver importance by gender.



EVP driver importance by education.

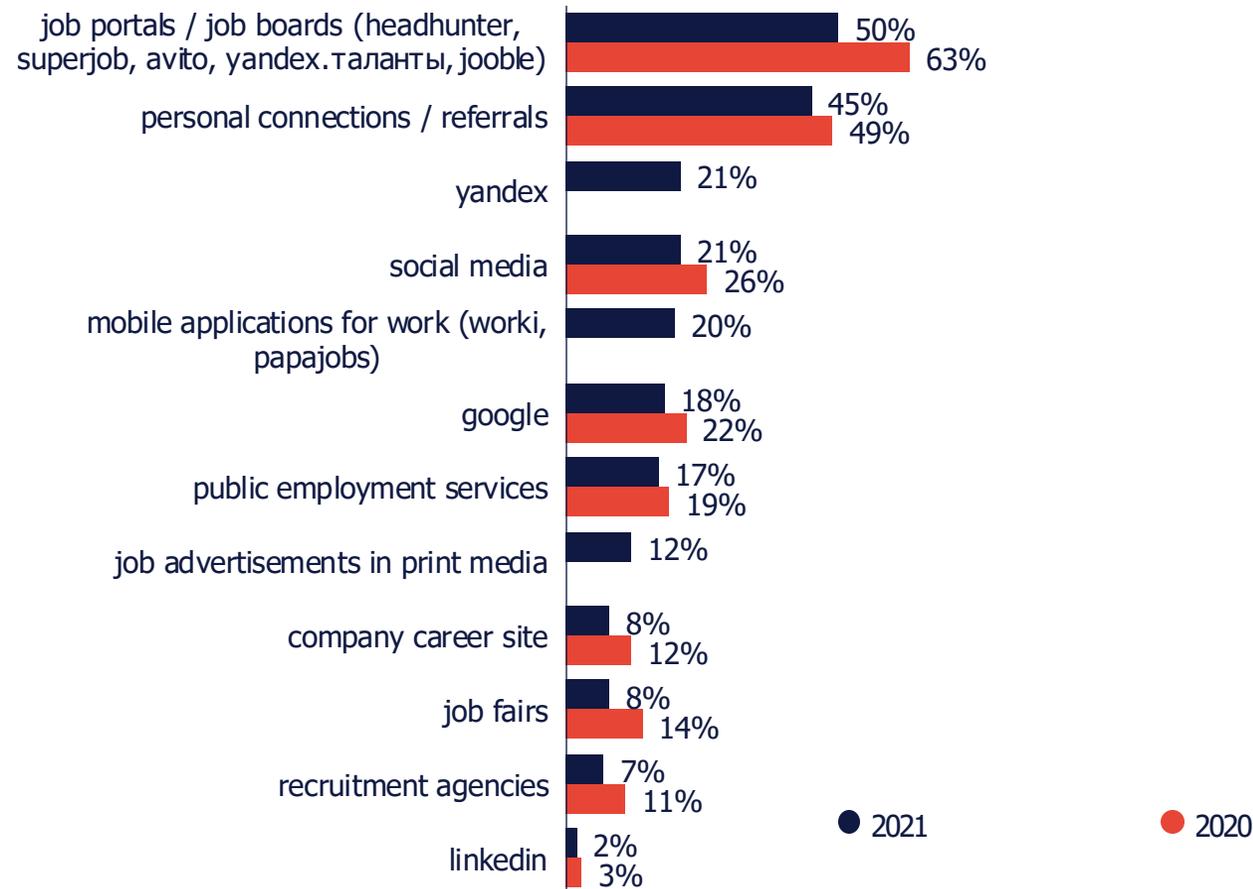


EVP driver importance by age.

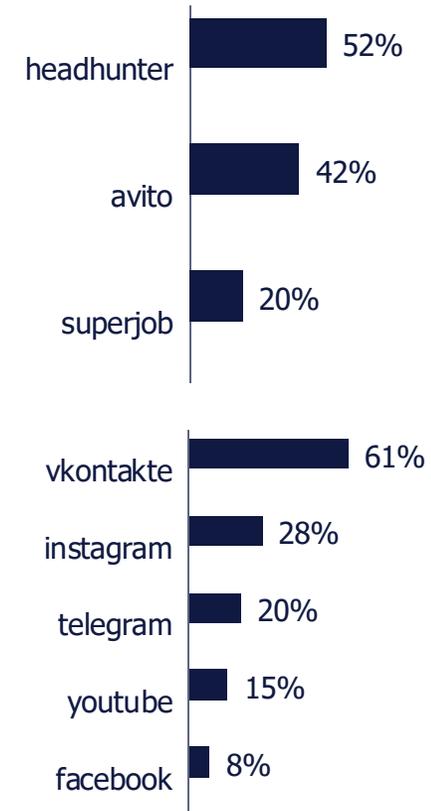


how do employees in russia find new job opportunities.

channels used to find new job opportunities



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



appendix 2



deep dive
employers.

perception of employer offer in russia.

Understanding the gap between what employees want and what they think employers offer provides valuable insights into building an employer brand. Furthermore, benchmarking against what employees perceive being offered by their current employer gives more context to the gaps that need to be bridged.

evaluation of current employer

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

general perception of employers in russia

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

profile of ideal employer

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

perception of employer offer in russia and the region.

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



employers in russia are perceived to offer

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

employers in cis are perceived to offer

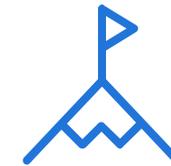
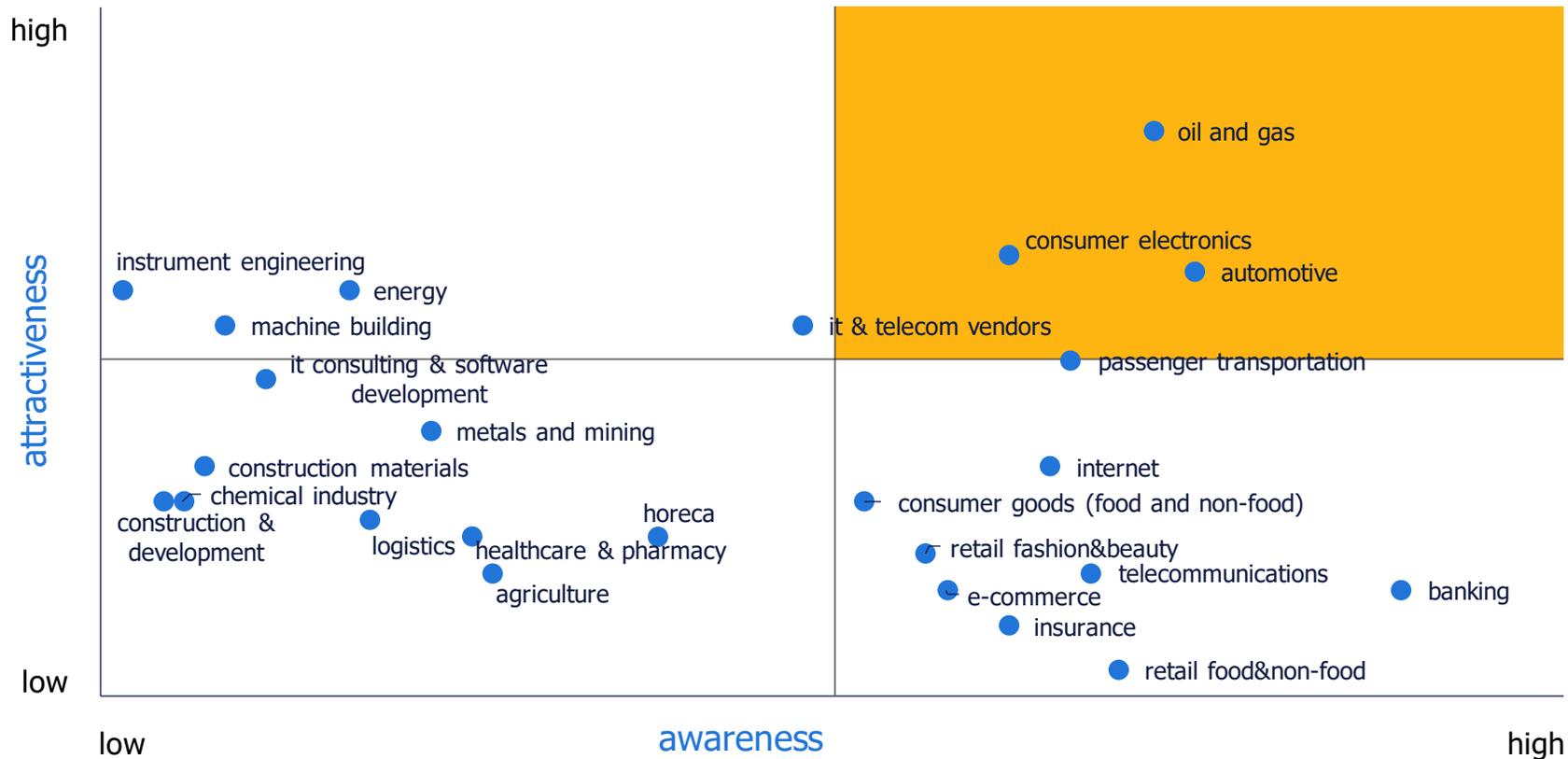
- 01 financially healthy
- 02 very good reputation
- 03 job security
- 04 COVID-19 safe work environment
- 05 attractive salary & benefits
- 06 career progression
- 07 pleasant work atmosphere
- 08 work-life balance
- 09 gives back to society
- 10 possibility to work remotely/from home

sector

insights.



top performing sectors in russia by awareness and attractiveness.



high awareness

having a high awareness means that employers in the sector are widely known.

high attractiveness

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

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

top 5 companies

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



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

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

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

top 5 companies

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

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

1/3

top 3 EVP drivers

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



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

2/3

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



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

3/3

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

top



employers.

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

top 10 employers 2021

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

top 10 employers 2020

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

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

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

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

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

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

appendix 3



methodology.

employer brand research set up.

30 companies per respondent

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

for each company known

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

each company known

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

smart sampling

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

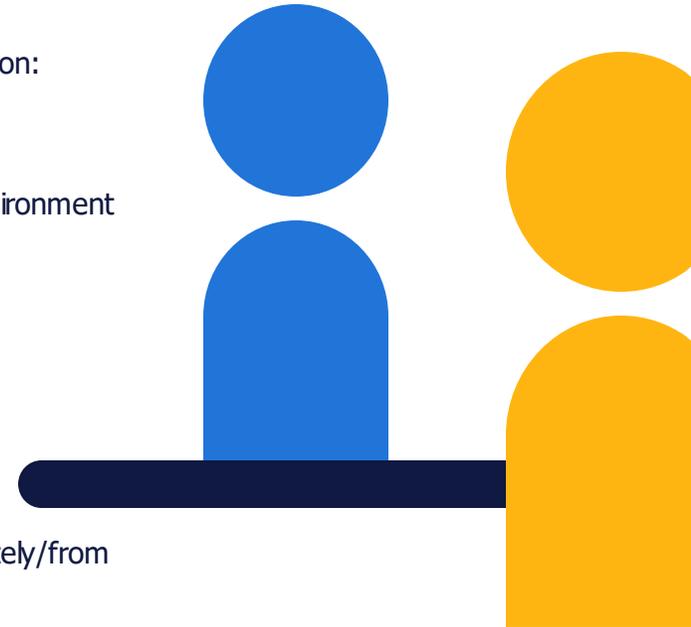
In order to make sure that the less well known brands are assessed by a sufficient number of respondents, we make use of a smart sampling method.

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

drivers

each company is evaluated on:

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



KANTAR

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



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