Global Employer Brand Study

A two-phase research initiative among HR professionals from 25 countries.

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External talent wants to see evidence of a consistent approach to employer experience; they want to know what lies within your organizational “DNA”. At the same time, they don’t want to see it written in stone. They repeatedly tell us that they would like to influence the organization, its culture, and its behaviors. It’s further evidence of this need to align the “me” brand with that of the organization. Fresh talent wants to see an organization that is going on a journey. They also want the opportunity to hop on board and help steer that journey.
Bernard Hodes Global Network Employer Brand Study

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FOREWORD

The subject of employer branding is close to the hearts of everyone who works in the Bernard Hodes Global Network. Simply put, our business is about talent: finding talent, recruiting talent and then motivating and retaining it. We do it for ourselves and we do it for our clients. It is why people join us and why people partner with us.

We passionately believe in the connection between the type of employees an organization has, how engaged they are, and, consequently, how successful that organization is in achieving its goals.

Employer branding is increasingly viewed as the magic pill for challenges such as a difficult talent climate, shrinking talent pools, and a “consumer” that is increasingly tough to engage.

The concept of employer branding is not a new one; it has already evoked much publicity and discussion. So much is written about what it is and what it isn’t, that we wanted to take a fresh look. Through a scientific and consultative approach we’d like to uncover what employer branding means today and what it could mean tomorrow.

There are some fundamental issues we have sought to clarify through our research:

- What is the scope of the employer branding definition? Is it more than a recruitment initiative?
- Who is involved in an employer branding exercise? How far does it reach into the wider organization?
- How does it link to the vision and mission of the organization?
- What is the business case or “burning platform”?
- What is the subsequent return on investment?

The above are a mere taste of our overall research. Some of the findings were expected, yet an equal number of things surprised us. This in itself reflects how fast and how far human resources functions are evolving inside global organizations. As organizations themselves wake up to the link between talent and organizational success, Human Resources has an opportunity to build its own brand by revealing, in a meaningful way, its commercial relevance.

- The Bernard Hodes Global Network
OBJECTIVES

While much has been said in the media about employer branding, our objective is to address, in a quantitative and qualitative manner, the state of employer branding. Bernard Hodes Global Network feels passionately about providing strategic branding services to employers. So we embarked on an initiative to systematically assess the state of employer branding globally.

The overall goal of this employer branding research initiative was to better understand the characteristics of employer branding in an international context among human resources professionals. The hope is that by providing this information, human resources professionals will find strategic direction for their own organizations and that this resource can be used to bolster those efforts.

There were two phases to our global employer brand research. Phase I consisted of an online survey that gathered diverse opinions from 487 global organizations. Phase II was comprised of one-on-one interviews with human resources professionals from 20 organizations worldwide.

Phase I objectives:

- Understand how employer branding is viewed by human resources professionals
- Assess the extent to which these employer branding efforts are supported by the organizations
- Determine the extent to which the employer branding efforts are formal and ad hoc
- Gauge future efforts to build employer branding programs
- Understand who is responsible for employer branding
- Measure the importance of different aspects of employer branding
- Identify the types of channels used for employer branding

Phase II objectives:

- Gain an in-depth perspective on the establishment of, and attitudes toward, global branding
- Identify firsthand the process by which organizations go about developing an employer brand
- Understand the challenges of the employer branding process
METHODOLOGY

PHASE I
An online survey was conducted among clients within the Bernard Hodes Global Network community, with participation from the following countries [see Appendix for a list of participating companies]:

Australia
Austria
Canada
China
Denmark
France
Germany
Hong Kong
India
New Zealand
Singapore
The Netherlands
United Kingdom
United States

The survey was conducted in four languages—Dutch, English, French and German—and consisted of 35 questions, covering the following issues:

- Respondent Demographics and Organization Profile
- How Employer Branding is Viewed and Supported
- Ad Hoc and Formal Aspects of Employer Branding
- Key Expectations of Employer Branding Programs
- Employer Branding Initiatives
- Responsibility for, and Stakeholders in, Employer Branding Programs
- Calibration of Employer Branding
- Employer Brand Attributes Directed Toward New Hires
- Audiences Targeted for Employer Brand Messaging
- Employer Branding Channels Used

A total of 487 respondents completed the survey from July 22, 2005 - November 30, 2005. The following is a breakdown of countries that had 21 or more completed surveys: United States (143 respondents), Canada (69 respondents), Australia and New Zealand (53 respondents), France (49 respondents), Austria (36 respondents), the Netherlands (36 respondents), United Kingdom (36 respondents), and Denmark
METHODOLOGY

(21 respondents). The following countries each had 5 or less completed interviews: China, Germany, Hong Kong, India, Ireland, Singapore, Sweden, Ukraine, Norway, Pakistan, Finland, Switzerland, Czech Republic, Italy, Malaysia, and Russia.

PHASE II

The Bernard Hodes Group Global Network conducted 20 in-depth one-on-one interviews with human resources professionals from February through April 2006. The countries represented in this research included:

Australia
Austria
Canada
Denmark
France
Germany
Hong Kong
New Zealand
Singapore
The Netherlands
United Kingdom
United States

The organizations represented in this research included:

Pharmaceutical company, Austria*
Innovation consulting firm, France*
Building material company, Austria*
Broadnet, Germany
Canon International Scientific Research, Australia
Comalco Aluminum, Australia
E.ON UK, United Kingdom
Enterprise, Germany
Ericsson, Denmark
Nokia, Germany
Philips, Netherlands
French car manufacturer*
Raffles, Singapore
Reitmans Fashion Group, Canada
Swire Shipping, Australia
Sun Microsystems, Hong Kong
Telia, Denmark
METHODOLOGY

Television New Zealand Ltd., New Zealand
Wellington City Council, New Zealand
Yahoo!, United States

*These organizations asked to remain anonymous.

Each interview lasted approximately 30 minutes. The topics discussed included:

- Organization’s overall mission or vision
- Essence of the organization’s communications that addresses employer branding
- Key driver or issue that caused the organization to pursue employer branding
- Most critical areas to manage in the process of developing an employer brand
- Greatest challenges facing the employer branding effort
- Overall thoughts on employer branding
EXECUTIVE SUMMARY

EMPLOYER BRANDING PERSPECTIVES

Online Survey

Employer branding is a recent, growing phenomenon that is evolving strategically for the companies surveyed worldwide in the Bernard Hodes Global Network Employer Brand Study.

The majority of respondents described employer branding as an integration of internal and external communications, disseminated to current and potential employees, rather than simply as an internal HR contract or external recruitment methodology.

Survey participants noted both the operational side of the employer branding process (delivering recruitment requirements), as well as the qualitative side (communicating expectations), are key tasks for human resources departments.

One-on-One Interviews

Most organizations participating in the one-on-one interviews have a corporate vision or mission statement that expresses their corporate strategy for the market. Often, this statement positions the organizations as being the premiere supplier or the most innovative in the market.

A few of the organizations extend their corporate mission or vision to include a code of conduct and/or a statement of corporate responsibility.

Some of the organizations believe their current vision or mission statement already addresses employer branding. Several have translated their corporate vision statement to an employer brand, such as “To be the employer of choice.” A few of the organizations built their employer brand around the corporate brand.

A few of the organizations do not currently have an employer brand, but are in the process of developing one.
EXECUTIVE SUMMARY

While human resources professionals are strong proponents of employer branding, for some there is an internal debate as to how to create the employer brand. The debate may involve how a corporate brand differs from an employer brand. Or, it may relate to how to fit the culture into the employer brand.

The human resources professionals participating in this research cited the following approaches to employer branding: collaboration, simplicity in messages, to link the brand with the line of business, to recognize strengths and weaknesses and then determine how to promote the company, and that employer branding is a long-term strategy.

SUPPORT & KEY EXPECTATIONS FOR EMPLOYER BRANDING

Online Survey

The Human Resources department is primarily responsible for, and is the key stakeholder of, employer branding initiatives. Other departments with primary responsibility and stakeholder status include Corporate Communications and Marketing.

Support for employer branding programs typically involved:

- Integrated brand communications
- A well-crafted statement of business principles or mission statement
- Workplace initiatives
- Systemic dissemination of these organizational objectives and strategies

Among those that do not formally support employer branding, two-thirds plan to formalize their programs within the next five years. Two-fifths of all respondents outsource elements of their employer branding programs.

One-on-One Interviews

The human resources professional generally has the primary responsibility for employer branding. Human Resources may need to collaborate with other stakeholders, such as Corporate Communications or Marketing, to garner support for this initiative.
EXECUTIVE SUMMARY

KEY DRIVERS & CRITICAL AREAS TO MANAGE FOR EMPLOYER BRANDING

One-on-One Interviews

The key driver that moves organizations to develop an employer brand is the need to acquire talent in a very competitive labor market. Organizations realize that to effectively compete in the market, they must: project a positive image that will be compelling to employees and candidates; differentiate themselves from other organizations, and find ways to ensure employee retention.

The critical areas to manage for employer branding vary by organization. Some commonalities include: consistency in messaging, establishing an identity, managing the corporate culture, managing the budget, and making the work appealing to both employees and prospects.

THE EMPLOYER BRANDING PROCESS

Online Survey

While most respondents appreciate the holistic concept of employer branding and support its philosophy with formal programs, a sizeable proportion of respondents address it in an ad hoc fashion.

The employer brand attributes receiving the highest importance rating based on the ability to attract new hires included: quality/reputation of products and services, corporate culture, and work environment.

The most important audiences for employer brand messaging included experienced hires, targeted professions, and college hires.

One-on-One Interviews

Organizations have found unique ways to develop an employer brand, foster stakeholders’ agreement with the brand messages, and evolve a sense of identity.

In one instance, an organization created a diagram mapping out the different corporate brands (consumer, physical product and employer), the components of each brand, and each brand’s constituencies. In a
EXECUTIVE SUMMARY

meeting with the key brand stakeholders (Corporate, Marketing, Human Resources), each party agreed to which role they played in each brand.

For another organization, the employer branding process involved following these strategic steps: (1) finding the right positioning and aligning recruitment practices accordingly, (2) making sure all the divisions follow a common branding platform, and (3) ensuring a smooth execution.

Another organization not only involved the stakeholders in charge of corporate identity to formulate the employer brand, it also included discussions of employer branding in employee workshops.

METRICS

Online Survey

One in four reported that their organizations measure their employer brand value in terms of recruitment and retention capabilities. Metrics such as cost-per-hire, time-to-fill and turnover were the measurements most often used to determine success of employment brand efforts.

One-on-One Interviews

Corporate and product brand managers use a variety of tools to measure the strength of their respective brands. The Brand Asset Valuator (BAV) developed by Young & Rubicam; the global brand valuation done annually by Interbrand and BusinessWeek, and mentions in the media are some of these techniques. There is no known, commonly accepted, employer brand evaluation tool.
PHASE I

“One of the best weapons in a competitive labor market is a strong employment brand that attracts and retains key talent.”

- The Corporate Leadership Council, U.S. Corporate Executive Board

GLOBAL EMPLOYER BRAND SURVEY

Welcome. Whether you are logging on from Singapore, Paris, or New Delhi, it is likely you have all heard something about EMPLOYER BRANDING. But does it have the same meaning to everyone, regardless of location, industry or company? Are the same EMPLOYER BRANDING tactics and processes practiced in Chicago, Madrid and Birmingham? Are there similar brands of success to piece together or can we learn just as much from the differences?

This is precisely what we would like to learn from our study, and more.

As an organization that partners with a diverse HR global client base to develop consulting and retention solutions, The Bernard Hodes Global Network has taken on the task of better defining the language, tactics, and best practices of employer branding among HR leaders worldwide. Our goal is to provide both qualitative research that could benefit the very clients we serve as well as educate us as providers, and you as users, on how best to offer, implement and measure employer branding solutions and practices.

We thank you in advance for taking the time to complete our online survey. All participants will receive a copy of our final research report. If you have any questions, please contact:

In the U.S. and Canada, Annette Brawdy, abrawdy@hodes.com.
In Europe, Asia, and South America, Tom Crawford, tcrawford@hodes.co.uk.

An online survey conducted among human resources thought leaders from 487 organizations worldwide. For a list of participating companies, see Appendix.
RESPONDENT PROFILE—ONLINE SURVEY

RESPONDENT TITLE

Almost three-fifths of respondents in the Global Network Employer Brand Survey were human resources managers or directors (29% each). Seven percent of participants were officers and 10 percent were vice presidents.

- In the United Kingdom, most were directors (70%). In the Netherlands, Austria, Australia/New Zealand, and Denmark, half were managers (54%, 56%, 54% and 48%).
RESPONDENT PROFILE—ONLINE SURVEY

INDUSTRY

Services (14%), high tech/IT (13%), health care and business and finance (9% each) were the industries with the highest percentages of respondents.
RESPONDENT PROFILE—ONLINE SURVEY

GENDER

Three-fifths (60%) of respondents were female.

- There was a fairly even mix in Denmark and the United Kingdom.
RESPONDENT PROFILE—ONLINE SURVEY

YEARS OF HUMAN RESOURCES EXPERIENCE

One quarter (27%) of respondents had between 6 and 10 years’ human resources experience. One-fifth each had 1 to 5 years, 11 to 15 years or 20+ years’ experience in human resources. Twelve percent had 16 to 20 years’ background in the field.

- In the United States and the United Kingdom there were a larger percentage of respondents with more than 20 years in Human Resources than in the other countries (30% and 32% vs. Denmark 0%, Canada 17%, France 14%, the Netherlands 5%, and Austria 11%).
RESPONDENT PROFILE—ONLINE SURVEY

YEARS WITH PRESENT COMPANY

Nearly two-thirds (63%) of respondents had been with their present employer for less than five years. One-fifth (19%) had between six and 10 years’ tenure with their employer.

- With the exception of the United Kingdom (86% had 1 to 5 years at their employer) the results were fairly consistent across all the countries.
RESPONDENT PROFILE—ONLINE SURVEY

TOTAL NUMBER OF EMPLOYEES

Over half of respondents represented companies with either 1,001-5,000 employees (24%) or over 5,000 (32%). One-fifth of respondents (21%) were from companies with less than 100 employees.

- In Denmark, most of the companies (86%) had over 1,000 employees.
EXPECTED HIRES IN 2005

Two-fifths (40%) of survey participants indicated that they expected less than 50 hires in 2005. One-quarter each expected between 100 and 299 (28%) or over 500 hires (24%).

- In Austria, two-thirds of the companies (68%) expected to hire less than 50 employees.
RESPONDENT PROFILE—ONLINE SURVEY

RECRUITMENT LOCATIONS

Over two-fifths of respondents primarily recruit in their home country (43%); one-third (30%) recruit in their local region and one-fifth (22%) recruit worldwide.

- In France and the Netherlands, most of the recruiting was done in their own country (73% and 70% respectively).
ANALYSIS & FINDINGS—ONLINE SURVEY

HOW EMPLOYER BRANDING IS VIEWED

The majority of respondents (52%) characterized employer branding as “The essence of our offering as an employer that is communicated internally and externally” by the company.

- Two-thirds of those from Denmark (67%) characterized employer branding as “The essence of our offering as an employer that is communicated internally and externally.”

- In France and Austria, at least two-fifths (42% and 49%) felt that employer branding was “Our promise and contract to current or potential employees that defines the delivery of our HR agenda.”

- Our promise and contract to current or potential employees that defines the delivery of our HR agenda.

- The essence of our offering as an employer that is communicated internally and externally.

- A solution for the consistency, style and impact of our external recruitment marketing materials.
ANALYSIS & FINDINGS—ONLINE SURVEY

HOW EMPLOYER BRANDING IS VIEWED

“The key responsibilities and expectations [of HR] are to deliver the promise we make in the hiring process. Consistently communicating the employee value proposition; adhering to the communication guidelines to express the employee value proposition, and thinking about potential and existing employees as customers.” (United States)

“By establishing clear corporate business standards, values and culture. Display an honest and open image here, and employees will identify with the organization.” (Netherlands)

FORMAL SUPPORT FOR AN EMPLOYER BRANDING EFFORT

Three-fifths (62%) of respondents noted that their organizations formally support an employer branding effort.

- Formal support for an employer branding effort was especially strong in France (71%). It was weakest in Austria (31%).
ANALYSIS & FINDINGS—ONLINE SURVEY

TYPES OF FORMAL EMPLOYER BRANDING SUPPORT

Among those organizations that do formally support an employer branding effort, integrated brand communications (79%), business principles/mission (69%) and workplace initiatives (66%) were considered the top three ways in which respondents’ companies formally supported employer branding efforts.

- Many in the United Kingdom (63%) and Austria (91%) support employer branding through community relations. In the Netherlands, almost seven in 10 (69%) support employer branding through organizational structure and reporting.

“As integrated brand communications is a key employer branding objective for many organizations, there will be more opportunity to be gained by joining stakeholders and brand audiences together. By integrating what we say to consumers and also to employees, we are reflecting that one serves the other. Therefore, they need consistent expectations about brand.” (United Kingdom)
ANALYSIS & FINDINGS—ONLINE SURVEY

INFORMAL, AD HOC BRANDING INITIATIVES UNDERTaken PERIODICALLY

Among organizations that do not formally support employer branding, half (51%) indicated that ad hoc/informal branding initiatives are periodically undertaken.

- About eight in 10 from Denmark (80%) said ad hoc/informal branding initiatives are periodically undertaken.

![Bar chart showing 51% yes and 49% no for informal initiatives.]

PLANS TO FORMALIZE INITIATIVES

Among organizations that do not formally support employer branding, two in five (43%) stated that there were plans to formalize ad hoc branding efforts in their organizations.

- About eight in 10 from Denmark (82%) said there were plans to formalize ad hoc branding initiatives.

- The United States (27%), the United Kingdom (19%) and Austria (19%) have the smallest percentage of respondents who plan to formalize these initiatives.

![Bar chart showing 43% yes and 57% no for plans to formalize initiatives.]
ANALYSIS & FINDINGS—ONLINE SURVEY

WHETHER FORMAL EMPLOYER BRANDING PROGRAM IS ENVISIONED WITHIN FIVE YEARS

Among the organizations that do not formally support employer branding, almost six in 10 (57%) envisioned a formal employer branding program within their organization over the next five years.

- Most in Denmark (93%), Australia/New Zealand (83%), and France (80%) envisioned formalizing the employer branding program within the next five years.
ANALYSIS & FINDINGS—ONLINE SURVEY

EXPECTATIONS OF EMPLOYER BRANDING

The most frequent employer branding expectations mentioned were: ease in attracting candidates (84%), recognition as an employer of choice (82%), increased retention rate (65%), shortened time-to-fill (53%) and delivery of a Vision and Values program (52%).

- In the United Kingdom, the most frequently cited employer brand expectations also included higher job acceptance rate (65%), setting a standard and framework for all human resources activity (62%), and benefits to the service delivered to commercial customers (65%).
ACTIVITIES CONDUCTED IN SUPPORT OF BRANDING INITIATIVES

Respondents cited the following as activities conducted in support of branding initiatives: current employee studies (76%), industry best-practices/benchmark research (53%), applicant tracking systems (48%) and employee referral programs (47%).

- The employee referral programs were more frequently mentioned in the United States than in all the other countries surveyed (71% vs. 17% to 59%).

- The most frequently mentioned activity in France was the applicant tracking system (83%).

![Bar chart showing the percentage of respondents who cited each activity.](chart.png)
ANALYSIS & FINDINGS—ONLINE SURVEY

DEPARTMENTS WITH PRIMARY RESPONSIBILITY/STAKEHOLDERS IN EMPLOYER BRAND

Among the organizations surveyed, the human resources department had both primary responsibility and stakeholder status in the management of the employer brand. Other departments with primary responsibility and stakeholder status included corporate (45% primary responsibility; 59% stakeholder status) and marketing (39% primary responsibility; 49% stakeholder status).

Many in Denmark (70%) and the United States (73%) said corporate was a stakeholder in the management of employer brand. Few (10%) from Denmark said Human Resources was an active stakeholder.
ANALYSIS & FINDINGS—ONLINE SURVEY

WHETHER BRANDING SERVICES ARE OUTSOURCED

Over two-fifths of respondents (43%) said their organization outsourced branding services.

- The majority in France (63%) and the Netherlands (75%) outsourced their branding services.

![Bar chart showing yes and no responses.](chart)

TYPES OF SERVICES OUTSOURCED

The services most often outsourced by respondent organizations included: advertising (71%), research (42%) and recruitment (33%).

- In Canada, one in eight (12%) outsourced research and one in four (23%) outsourced advertising.

![Bar chart showing various services.](chart)
ANALYSIS & FINDINGS—ONLINE SURVEY

CURRENTLY MEASURE EMPLOYER BRAND IN TERMS OF RECRUITMENT/RETENTION CAPABILITIES

One in four respondents (24%) noted that their organizations measure their employer brand in terms of recruitment and retention capabilities. Metrics such as cost-per-hire, time-to-fill and turnover are the measurements most often used to determine success of employment brand efforts. The results were fairly consistent across all the countries surveyed.

VALUE OF EMPLOYER BRAND IS CALIBRATED TO OVERALL COMPANY PERFORMANCE

Nearly one in eight (13%) respondents indicated that the value of their employer brand is calibrated to overall company performance. The key indicator for employer branding in this arena is return on investment (ROI). The results were fairly consistent across all the countries surveyed.
The employer brand attributes rated highest in importance by respondents to attract new hires included: quality/reputation of products and services (4.33), corporate culture (4.00) and work environment (3.97). The results were fairly consistent across all the countries surveyed. A scale of 1 to 5 was used, where “5” means important and “1” means unimportant.
ANALYSIS & FINDINGS—ONLINE SURVEY

AUDIENCE IMPORTANCE TO EMPLOYER BRAND MESSAGING

Respondents believed the most important audiences for employer brand messaging included experienced hires (4.15), targeted professions (3.93) and college hires (3.45). A scale of 1 to 5 was used, where “5” means important and “1” means unimportant.

- On average, website visitors were rated higher than college hires as an important audience for these countries: United States (3.57 vs. 3.15), United Kingdom (3.69 vs. 3.19), and Australia/New Zealand (3.54 vs. 3.08).
ANALYSIS & FINDINGS—ONLINE SURVEY

BRANDING CHANNELS USED

Company websites (94%), print materials (72%) and newspapers (58%) were the most frequently used channels for employer branding.
ANALYSIS & FINDINGS—ONLINE SURVEY

EMPLOYER BRANDING SUCCESS STORIES

Success stories cited by various respondents included:

- Selection of current employees in communications programs to “exemplify the brand”
- Consistency in recruitment advertising and end-to-end on-boarding programs
- Moving toward a “global” branding campaign
- Linking/growing the reputation for quality and opportunity
- Executive buy-in and a “high-touch internal communications strategy”
- College trainee, co-op and trainee program
- Improved performance management leading to better brand management (intrinsically integrated)
- Moving toward a service model—more coaching and education—and away from being a financially-driven organization

EMPLOYER BRANDING CHALLENGES

A number of respondents mentioned:

- The pressure of salary increases as a challenge to their company’s current non-compensatory benefits
- Desire to move employer branding to higher ground in the company, away from a recruitment focus alone
- Consistency in messaging among departments
- Keeping the brand fresh for younger recruits
- The need for the employer brand to “coexist” with the consumer brand

“Our biggest challenge is that our company promotes our product brands rather than the corporate brand. There are limited dollars put behind the corporate brand, so this makes recruitment more of a challenge.” (United States)

“Getting senior leadership to see the importance of employment brand and the flow-on effect it will have to the performance of the business.” (Australia)

“Need to establish clear culture. Now beginning to leverage marketing, PR, corporate branding and culture transformation efforts in establishing clear employer branding strategy moving forward.” (Canada)
ANALYSIS & FINDINGS—ONLINE SURVEY

COMPANIES CONSIDERED TO HAVE A SUCCESSFUL EMPLOYER BRAND

Below are companies mentioned often by survey respondents and why they think those businesses are successful:

**Starbucks:** They are known worldwide through their branding and it expresses their core values as a company.

**Vodafone:** They have it (brand) in their blood. In my dealings with them (as a client and a supplier), they appear to be passionate about what they do; they provide opportunities for growth to their high performers, and they provide a good level of attractive benefits to woo potential staff. They seem to have fun!

**More FM:** Fun brand—winner of Unlimited Best Places to Work. Internal employee satisfaction drives a strong employer brand message. More FM came 1st in the “Best Places to Work” awards, and they seem to have a great philosophy of fun in their organization.

**FedEx:** Overwhelming response to their recruitment ads and large numbers of unsolicited responses.

**YUM!:** Everyone in town wants to work at Yum! at some point in their career. They have a very unique culture and a worldwide brand presence.

**Novo Nordisk:** Provides one-year maternity leave, are open and honest in their communication, and have an excellent website for recruiting.

**L’Oreal:** Honest about who they are and consistent in their message to employees.

**Disney Corporation:** Every detail is tied to their brand.

**Southwest Airlines:** Everywhere you go, they are held up as the standard for a successful employment brand. They have managed to take their customer promise and make it real to the employees—or vice versa. When your customers can see your employment brand in action, that’s when you know you’ve been successful.
PHASE II

The Bernard Hodes Global Network conducted 20 in-depth one-on-one interviews with human resources leaders from 12 countries worldwide. We wish to extend a grateful “thank you” to the human resources leaders listed below who contributed to this research:

Alex Oakley, Head of Resourcing, E.ON UK, United Kingdom
Anne Silvennoinen, Resourcing & Employment Specialist, Nokia, Germany
Anthony Keh Seng Ann, Human Resources Manager, Raffles Education Corp., Singapore
Craig Morris, Human Resources Manager, Television New Zealand, New Zealand
Eileen Klitvad, Vice President Human Resources, Telia Denmark, Denmark
Fiona Warnock, Human Resources Manager, Canon Information Systems Research, Australia
Geneviève Fortier, Vice President Human Resources, Reitmans Fashion Group, Canada
Jo Pieters, Global Vice President Recruitment, Philips, the Netherlands
Katrin Gnielka, HR Manager, Enterprise North Germany
Lucy Chang, Talent Acquisition Sr. Manager – Asia Pacific, Sun Microsystems, Ltd., Hong Kong
Libby Sartain, Sr. Vice President/Chief People Officer, Yahoo!, United States
Martin Bowen, Human Resources Manager, Swire Shipping, Australia
Nina Thonfeld, HR Manager, Broadnet, Germany
Peter Hemmingsen, Human Resources Manager, Ericsson, Denmark
Richard Smallcombe, Manager Human Resources, Comalco Aluminum Limited, Australia
Susan Quirk, Director Human Resources, Wellington City Council, New Zealand

“In my view, winning the war for talent means primarily focusing on retention of your current talent and following that, building a strong position in your key labor markets. Therefore, a brand that is only visible in external communications is less valuable than a brand that is truly lived inside. Each and every employee should act as an ambassador of your brand and that requires a strong and recognized internal and external employee value proposition.”

- Jo Pieters, Global Vice President Recruitment, Philips, The Netherlands
ORGANIZATION VISION STATEMENT

Almost all the organizations (18 out of the 20) participating in this research have a corporate vision or philosophy. The visions primarily center on projecting the organization as the best or most innovative.

The two organizations that said they do not have a vision stated that their company is in a period of transition.

The following are some of the visions that were mentioned:

“To be the premier creative arts, design, lifestyle and business management education group in Asia Pacific”
- Anthony Keh Seng Ann, HR Manager, Raffles Education Corp., Singapore

“We want to shape the future”
- Peter Hemmingsen, HR Manager, Ericsson, Denmark

“Simplicity makes everything possible”
- Eileen Klitvad, VP Human Resources, Telia Denmark

“People first, profit second”
- Katrin Gnielka, HR Manager, Enterprise North Germany

“To be the multipurpose liner shipping service of choice in the regions in which we operate”
- Martin Bowen, Human Resources Manager, Swire Shipping, Australia

“To discover, develop and deliver innovative image and information technologies that strengthen and diversify Canon’s business and CiSRA’s independent worldwide business”
- Fiona Warnock, Human Resources Manager, Canon Information Systems Research, Australia

Some organizations extend their vision to address values.

“Nokia includes a statement for Corporate Responsibility and Code of Conduct.”
- Anne Silvennoinen, Resourcing & Employment Specialist, Nokia, Germany

“Enterprise has eight core-values, such as ‘Our Doors are Open’ and ‘We listen to our clients and our employees.’”
- Katrin Gnielka, HR Manager, Enterprise North Germany
ANALYSIS & FINDINGS—ONE-ON-ONE INTERVIEWS

For many of the organizations with a corporate vision or mission, most employees are aware of the corporate mission or vision but cannot paraphrase it. Sometimes, this is due to a recent brand re-alignment.

EMPLOYER BRANDING

Sixteen of the 20 organizations either believed that their overall organization vision already addresses employer branding or they have extended their organization vision statement to address employer branding or employee values. Four organizations have not yet established an employer brand.

Here are examples of how these organizations feel their brand addresses employer branding:

“The claim ‘Connecting People’ is perceived as resonating employer branding in that employees will be proud for producing a socially meaningful task.”
- Anne Silvennoinen, Resourcing & Employment Specialist, Nokia, Germany

“To be the employer of choice in the Canadian fashion retail industry.”
- Geneviève Fortier, Vice President Human Resources, Reitmans Fashion Group, Canada

“We position ourselves as a company which develops our people to make sure their employability is always on top. To make sure they have a great future within our company or [elsewhere].”
- French auto manufacturer

“… an organization that will provide expatriates with an Asian perspective and experience, taking full advantage of the presence in Asia.”
- Anthony Keh Seng Ann, HR Manager, Raffles Education Corp, Singapore

“For us, the company’s mission, vision, strategy, brand and values are together the reason for being. They should be seamlessly interlinked and be on the top of mind of every employee.”
- Jo Pieters, Global Vice President Recruitment, Philips, the Netherlands

One organization, Telia, does not have an employer brand but is in the process of developing it. Telia is utilizing both stakeholders (HR, Marketing and Communications) and employees to formulate the corporate brand.

An HR manager at Enterprise stated that as the company is not as well known in Germany as it is in the United States, Enterprise is focusing more on general advertising than on promoting an employer brand.
ANALYSIS & FINDINGS—ONE-ON-ONE INTERVIEWS

EMPLOYER BRANDING CHANGES IN PAST THREE YEARS

“Over the past three years, Yahoo! repackaged their Human Resources products and services around the overall corporate mission, brand, and values. They then developed a recruitment brand that fits in with those Human Resources products and services.

“The process of developing the recruitment brand enabled Yahoo! ‘to do some strong thinking’ about what we stand for and how we market ourselves to both technical and non-technical talent. The recruitment brand is not tailored to each target audience. However, the brand looks different depending on where it is being used, such as in the college campus, at a technical conference, or for marketing people.”
- Libby Sartain, Sr. VP/Chief People Officer, Yahoo!, United States

KEY DRIVERS CAUSING EMPLOYER BRANDING DEVELOPMENT

Attracting new employees, competing in a stiff labor market, and wanting to project a favorable image were the most frequently cited key drivers that move organizations to establish an employer brand.

The following are some of the key drivers cited by the respondents:

“Tightening labor market”
- Craig Morris, Human Resources Manager, Television New Zealand

“Insure company is applicant friendly”
- Craig Morris, Human Resources Manager, Television New Zealand

“Need to give employees confidence on how to sell the company … Need to look at how to strengthen channels … provide a message to that population.”
- Lucy Chang, Talent Acquisition Sr. Manager – Asia Pacific, Sun Microsystems, Hong Kong

“A great public profile”
- Susan Quirk, Director Human Resources, Wellington City Council, New Zealand

“We need good employees. And first of all, we need our employees to stay here longer than they do today”
- Eileen Klitvad, VP Human Resources, Telia Denmark

“Attracting raw talent and awareness of what we do at an early educational age”
- Fiona Warnock, Human Resources Manager, Canon Information Systems Research, Australia
ANALYSIS & FINDINGS—ONE-ON-ONE INTERVIEWS

“Need to differentiate our company from our competitors, and our employer branding was a starting point to address this challenge”
- Geneviève Fortier, Vice President Human Resources, Reitmans Fashion Group, Canada

“Positioning company as employer of choice”
- Susan Quirk, Director Human Resources, Wellington City Council, New Zealand

“Diversity in job types and people; we were focusing on graduates, now we are focusing on experienced people”
- French car manufacturer

“We need to hire 400 trainees … Need to make name for yourself as an employer.”
- Katrin Gnielka, HR Manager, Enterprise North Germany

“To recruit the best people to service demanding clients”
- French Information Consulting Corporation

CHALLENGES & CRITICAL AREAS TO MANAGE IN THE EMPLOYER BRANDING PROCESS

The critical areas to manage in the employer branding process are diverse and depend on the climate at each organization. However, several common issues faced by these global organizations included: maintaining consistency in terms of messages, establishing an identity, managing the corporate culture, the budget, and making the work appealing to both employees and prospects.

“To maximize the value of an organization in the marketplace, attention must be paid to the brand and its promise. Unmanaged it becomes a matter of chance and its full equity will not be realized.”
- Alex Oakley, Head of Resourcing, E.ON UK, United Kingdom

“Manage employee expectations of good compensation and benefits.”
- Anthony Keh Seng Ann, HR Manager, Raffles Education Corp, Singapore

“How to keep good employees. Keep the daily work interesting.”
- Austria pharmaceutical company
ANALYSIS & FINDINGS—ONE-ON-ONE INTERVIEWS

“Change management: convince all divisions about their common interest to launch such a project and deal with the numerous stakeholders involved. Organizational culture: Create a corporate brand name different from the legal name. Technical challenge to ‘fit’ with important budget constraints.”
- Geneviève Fortier, Vice President Human Resources, Reitmans Fashion Group, Canada

“Handling all expectations, capturing the right audience.”
- Fiona Warnock, Human Resources Manager, Canon Information Systems Research, Australia

“Identity. We [were] part of Ericsson Telephone but no longer. People still say ‘Connect Ericsson’... We have been very quiet in the market and as branding ourselves as a firm to potential colleagues because we have been through a reduction [layoff] round.”
- Peter Hemmingsen, HR Manager, Ericsson, Denmark

“We are constantly under fire from other media (especially print media).... So because our public profile is high you need to ensure people are okay with this type of public scrutiny. HR meets this head on.”
- Craig Morris, Human Resources, Television New Zealand

“Create a workplace that has an identity that makes employees want to stay. Being part of the telecom industry ... it does not have the best image in terms of a stable secure workforce...”
- Eileen Klitvad, VP Human Resources, Telia Denmark

“Budget, which is decreasing every year”
- French car manufacturer

“... the biggest challenge that we faced (in doing our brand development work) was getting all the right people at the table on the same page.”
- Libby Sartain, SVP HR/Chief People Officer, Yahoo!, United States

“Need a branding strategy that reflects the changing demographic and nature of our business—such as community relations focused, sustainability, Gen X-Y aspirations, smart, progressive, innovative business career opportunities.”
- Richard Smallcombe, Manager Human Resources, Comalco Aluminum Limited, Australia

THE EMPLOYER BRANDING PROCESS

Creating Venn diagrams for securing cooperation from different stakeholders; utilizing employee workshops, and formulating the employer brand are all examples of how organizations go about creating an employer brand. The role of Human Resources is strategic in this process.
ANALYSIS & FINDINGS—ONE-ON-ONE INTERVIEWS

Yahoo! held a meeting with interested stakeholders. “they ... ended up drawing a diagram. It’s called our ‘Mickey Mouse ears’... they had three big circles. One [circle] was our consumer brand, one was our employment brand and one was our physical brand. ... Inside the circles ... were the components that make up each of those [brands]... Outside the circles, we had all the constituencies that we had to communicate to. And then that kind of showed us how they all sort of tended to relate to each other. And then we talked about it and agreed on who had what role in that picture.”

- Libby Sartain, Sr. VP/Chief People Officer, Yahoo!, United States

At Reitmans Fashion Group, the three steps to redefine the overall recruitment strategy were: (1) “Find the right market positioning to set Reitmans as an employer of choice and revise our recruitment practices to enhance our capacity to reach out to candidates… (2) Harmonize the 6 divisions’ identities to develop a common branding platform. (3) Ensure a smooth execution of the new recruitment campaign.”

- Geneviève Fortier, Vice President Human Resources, Reitmans Fashion Group, Canada

THE EMPLOYER BRANDING PROCESS

At Telia, stakeholders (HR, Marketing, and Communications) are holding employee workshops to formulate employer brand. “These three people [HR, Marketing, and Communications] are in charge of corporate identity. The way we are going to manage it is that in the beginning of March, we are having workshops where we invite around 30 employees. This is done with special attention being focused on the following questions: What kind of company would we like to be, both internally and externally? What can we offer our employees? What can we expect from our employees? How do we make our surroundings aware of it?”

- Eileen Klitvad, VP Human Resources, Telia Denmark

“Human Resources form a partnership with many areas of the business to deliver the employment brand. They cannot do this on their own. However, they can set the framework, and act as the driver to push the brand forward in a way that is focused and specific to the target audiences, both existing and potential employees.”

- Alex Oakley, Head of Resourcing, E.ON UK, United Kingdom

METRICS

Metrics used to measure employer brand performance were discussed with Yahoo! The Yahoo! consumer brand is included in the Brand Asset Valuator (BAV) research by Young & Rubicam. The BAV tool utilizes four factors to measure brand performance: differentiation, relevance, esteem, and knowledge. Yahoo! was unaware of any brand performance tool that is specifically devoted to employer brand.

Other metrics discussed included counting the number of times the brand is reported in the media and the Interbrand brand valuation tool.
ANALYSIS & FINDINGS—ONE-ON-ONE INTERVIEWS

BRANDING PROGRAMS

Yahoo! has specific branding programs that were created to help employees and candidates. They include the “My Life” and “My Guide” series, which are provided to employees on their Intranet. The “My Life” series include: “My Life, My Rewards,” “My Life, My Career” and “My Life, My Perks.” The “My Guide” series includes such titles as “My Guide to Working at Yahoo!,” “My Guide to Interviewing at Yahoo!,” and “My Guide to Reward and Recognition at Yahoo!”

ADDITIONAL COMMENTS

All the organizations participating in this research felt very strongly about employer branding and how it should be developed and managed. The quotes demonstrate an in-depth understanding that successful employer brand positioning is built from the inside out. The proposition as an employer is to gain respect and credibility. It has to be formed first from an internal perspective.

“HR people miss the boat by not collaborating …”
- Libby Sartain, Sr. VP/Chief People Officer, Yahoo!, United States

“I think the ones that get it right have kept it simple … It is important for it to be fairly recognizable and consistent and then constantly prominent in all communication modes … Think it is crucial to link the branding implicitly with your line of business somehow.”
- Martin Bowen, Human Resources Manager, Swire Shipping, Australia

“Employer branding is increasingly becoming more important but most organizations (like ours) have a lot of room to move. Employer branding is a part of delivering good HR, not a separate thing you do. We are continuing to increase our investment in it.”
- Susan Quirk, Director Human Resources, Wellington City Council, New Zealand

“I think employer branding only started getting publicity about five years ago—prior to that, people spent some time on their logo but that was about it. They didn’t integrate general markets through to employer branding. Now there is much greater awareness that your brand isn’t only about product but people as well.”
- Craig Morris, Human Resources Manager, Television New Zealand
ANALYSIS & FINDINGS—ONE-ON-ONE INTERVIEWS

"The discussion we have in our firm right now is the definition. What is the difference between employer branding and traditional company branding? Is there a difference? And if so, what is the difference? This is interesting. … The brand has to flow through the organization, and all the staff members are a part of the brand. It is not only a project but also general changes in behavior."
- Peter Hemmingsen, HR Manager, Ericsson, Denmark

"Employer branding has become a ‘buzz word’ over the past couple of years. … It is vital that what you live inside the company (working environment/people management practices) is reflected outside (branding) and the reverse is also true. … Each company should look for differentiation from others. Be honest and recognize strengths and weaknesses you have, and determine from there … which [way] you will promote your company. Be consistent with the culture of the company and the way you promote your brand."
- Geneviève Fortier, Vice President Human Resources, Reitmans Fashion Group, Canada

"Any investor knows that a company’s value stands and falls with the quality of the workforce. They increase a company’s value as well as improve its brand and image."
- Nina Thonfeld, HR Manager, Broadnet, Germany

"In my view, winning the war for talent means primarily focusing on retention of your current talent and following that, building a strong position in your key labor markets. Therefore, a brand that is only visible in external communications is less valuable than a brand that is truly lived inside. Each and every employee should act as an ambassador of your brand and that requires a strong and recognized internal and external employee value proposition."
- Jo Pieters, Global Vice President Recruitment, Philips, The Netherlands

"I am a strong proponent of employer branding. It is the basic fundamental of any recruitment strategy. You have to know who you are as a company, your messaging, and what is your competitive advantage against other companies. It is a long-term strategy, which I think many companies fail to recognize. … In moving forward, I am going to try to pull the reigns on trying to drive employer branding."
- Lucy Chang, Talent Acquisition Sr. Manager – Asia Pacific, Sun Microsystems, Hong Kong
CONCLUSIONS

EMPLOYER BRANDING METRICS ARE NEEDED

Only one-fourth of the organizations surveyed (24%) measure employer brand in terms of recruitment and retention capabilities.

There are several reasons why so few organizations measure employer branding. One is that there is no standard evaluation tool dedicated to measuring the effectiveness of employer branding. The Brand Asset Valuator (BAV) developed by Young & Rubicam and the global brand valuation done annually by Interbrand and BusinessWeek are used to measure consumer brands, not employer brands. Another reason is that the definition of success for employer branding varies from one organization to another.

The important point to keep in mind is that in order to measure the extent to which an employer brand contributes to the bottom line, it is necessary to develop common metrics for this purpose.

EMPLOYER BRANDING HAS AN INTERNAL AND EXTERNAL ASPECT

“The brand has to flow through the organization.”
- Peter Hemmingsen, HR Manager, Ericsson, Denmark

Our experience has time and time again shown that a successful brand positioning will be “built from the inside out.” That is to say, any proposition as an employer that is to gain respect and credibility has to be formed from an internal perspective. Knowing what excites and engages existing employees and combining that with an achievable aspiration is a good combination.

External talent wants to see evidence of a consistent approach to employer experience; they want to know what lies within your organizational “DNA”. At the same time, they don’t want to see it written in stone. They repeatedly tell us that they would like to influence the organization, its culture, and its behaviors. It’s further evidence of this need to align the “me” brand with that of the organization. Fresh talent wants to see an organization that is going on a journey. They also want the opportunity to hop on board and help steer that journey.

If we are being true to the definition of the word brand, then it has to be about experience. A brand promise is something you deliver as much as you communicate. By definition, it has an internal behavioral component.
CONCLUSIONS

THE SCOPE OF EMPLOYER BRANDING IS BROAD

About half of the respondents across the globe characterize employer branding as “The essence of our offering as an employer that is communicated internally and externally” by the company. About one in five feels it is our current or potential employees that define the delivery of our human resources agenda, and one-fourth view it as a solution for the consistency, style and impact of our external recruitment marketing materials.

It is clear from the statistics in our question about employer brand definition that the scope of employer brand is broad. One in five people views it as a “built from the inside” experience. For those people, employer brand covers the entire employee lifecycle and behavior during the employee journey through the organization. This gives employer branding the opportunity to reflect a joint purpose for Human Resources.

Slightly more people, however, still believe that employer branding is a predominantly externally focused, desired expression of the organization, designed to boost candidate pools. The middle ground is clearly the largest and reflects the evolution that we are going through globally. Jo Pieters, VP Global Resourcing at Philips in the Netherlands, has a great way of defining Employer Brand. He challenges organizations to think of it as a pre-sales, sales and after-sales process—each component of which requires equal attention. This corresponds with our view that employer branding is a tool by which to provide a purpose for all human resources activity, strategy and outputs.

STAKEHOLDERS NEED TO WORK TOGETHER—
DELIVERING TO EMPLOYEES DELIVERS TO THE CUSTOMER AS WELL

Three-fifths of respondents noted that their organizations formally support an employer branding effort. Integrated brand communications, business principles/mission, and workplace initiatives were the most frequently cited ways in which respondents’ companies formally support employer branding efforts.

More than three-quarters cite “integrated brand communications” as a key objective for employer branding. This means that there is more opportunity to be gained in many organizations by joining brand stakeholders and brand audiences together. Our research in the marketplace, among all types of talent, repeatedly tells us
CONCLUSIONS

that a key consideration for choosing an employer is the consumer experience. How the brand behaves and communicates in this context directly impacts its ability to attract top candidates.

This phenomenon was identified as early as 2001 in that year’s Millward-Brown BrandZ™ survey. Fielded among thousands of consumers in Western Europe and North America about hundreds of brands, the survey drew a direct correlation between the strength of an organization’s corporate brand and its attractiveness as an employer.

By integrating what we say to consumers and also to employees, we are reflecting that one serves the other. Both those audiences need consistent expectations about your brand.

KEY DRIVERS

The key driver that moves organizations to develop an employer brand is the need to acquire talent in a very competitive labor market.

“Any investor knows that a company’s value stands and falls with the quality of the workforce. They increase a company’s value as well as improve its brand and image.”

- Nina Thonfeld, HR Manager, Broadnet, Germany

For many organizations, employer branding still remains an exercise of profile and awareness raising. The website is the shop window to the world that most respondents seem to be keen to dress. However, talent repeatedly tells us that the experiential aspects of an organization’s brand are the most compelling, such as the conversations they have with co-workers or people that they encounter at a job fair.

Increasingly, it is also the unplanned brand interactions that are most significant. Those that occur when you hear someone in a pub, at a party or elsewhere in everyday life talking about their employer and what it is like to work for them. We are a highly networked society. We have an insatiable desire to talk to each other sometimes simply because we can. The recent and rapid rise of blogs is evidence of this fact. The future for employer branding has to live as much off the page as on it. It has to be about ensuring your employees are brand ambassadors rather than brand saboteurs. The brand has to be lived by each and every person that belongs to it.
APPENDIX

GLOBAL EMPLOYER BRAND SURVEY

Breakdown by country of companies represented in the survey:

Australia/NZ

Adams Group
Adecco
Auckland District Health Board
Australian Aerospace Resources Pty Ltd
Bay of Plenty District Health Board
Bendon Limited
BlueScope Steel
Boral
Canterbury District Health Board
CBA
Cement Australia
Changepeople Ltd
City of Melbourne
Citymed Pharmacy
Clayton Utz
Daikin Australia Pty Ltd
David Forman Ltd
Drake
FX Consultants
Haines NZ Ltd
Heinz Watties Ltd
Hutt Valley District Health Board
IBM New Zealand Ltd
Inland Revenue
Kirkman HR Ltd
Link Recruitment P/L
Meridian Energy
Ministry of Economic Development
Norris Ward McKinnon
OCG Consulting
Otago District Health Board
Pacific Brands
PPCS Ltd
Queensberry & Company
Restaurant Brands
Southland Building Society (SBS)
Sport Waikato
Standards New Zealand
State Street
State Super Financial Services Australia Limited
Symsys Ltd
Tegel Foods Ltd
Television New Zealand Limited
Thiess Pty Ltd
Tower New Zealand
Transpower
Unisys Corporation
Wellington City Council

Austria

21TORR GmbH
A. Sochor & Co. GmbH
ABB AG
Accor Hotellerie Österreich
Actelion Pharmaceuticals Austria GmbH
Adria-Wien Pipeline GmbH
Andritz AG
AOK - Die Gesundheitskasse in Hessen
Berner GmbH
Binder+Co AG
Degussa AG
Deichmann Schuhvertriebsges.m.b.H.
Generali Gruppe Österreich
ISOSPORT Verbundbauteile Ges.m.b.H
KABEG
Knapp Logistik Automation GmbH
Kolpinghaus Gemeinsam Leben
Leder & Schuh AG
Logistik Service GmbH
Merkur-Versicherung AG
Miba AG
Nycomed Austria GmbH
Pago International
Pfizer Corporation Austria
Pilkington Graz GmbH
Polyfelt
Raiffeisen Zentralbank Österreich AG
RHI AG
Robert Bosch AG
RSL Care
Salinen Austria AG
Schönherr Rechtsanwälte OEG
Steco Logistic GmbH
Tetra Pak GmbH
Teufelberger Holding AG
Welser Profile AG
ZF Lernförder Achssysteme
Canada

Accovia Inc.
Agence de développement des réseaux de santé et de services sociaux de Montréal
Air Canada
Airborne Entertainment Inc
Aliments Ultima Inc.
Banque Laurentienne du Canada
Bell
BPR-Bechtel Inc
Braum Consulting Ltd
Business Objects
Canadian Cancer Society
Canlan Ice Sports Corp
Capers Community Markets
Cascades Inc.
CHIP Hospitality
CIBC
Cirque du Soleil
CN (Canadien National)
Coast Hotels & Resorts
Consultation LJH Consulting
CRA-Cogem
Cummins Western Canada
Équipement Fédéral
Fédération des Caisses Desjardins
Fédération des caisses populaires Desjardins du Québec
Focus Corporation
Future Shop
Gateway Property Management Corp
GE Canada - I&RS
Hercules Inc
Hôpital Charles LeMoyne
Hr.com
HSBC
Hydro One Networks Inc
JobWings
Journal Metro
Korn/Ferry International
LL2 société-conseil
McGill University
Novartis Pharmaceuticals Canada Inc
Pfizer Canada
Pratt & Whitney Canada
Premier Tech
Pulp and Paper Research Institute of Canada
Raymond Chabot Grant Thornton
Reitmans Canada Limitee
ResortQuest
Robeez
Sobeys Québec
Softchoice
Soltron Realities Inc
The Bay Vancouver Downtown
The Corporation of the City of Cranbrook
The Finishing Touch
Top Producer Systems Company
Transcontinental Media
Travel Insurance Coordinators
Uni-Select Inc
Vancouver Port Authority
Ville de Montréal
Weir Canada Inc
WR3 Technologies Inc
WSA Human Capital Solutions
Xillix Technologies
Yellow Pages Group
YMCA du Grand Montréal
zed.i solutions inc

China

Jumpsource
STR
Sun Microsystems of California
Target
Webasto-Shanghai

Denmark

A/S Dansk Shell
Carl Bro Group
Carlsberg Breweries
Chr. Hansen A/S
Coloplast A/S
CSC Danmark
Danfoss
Danske Bank Group
Ericsson
H. Lundbeck A/S
Microsoft
Nomeco A/S
Nordea
Novozymes
Nycomed
Oticon A/S
Rambøll Denmark
SAS Scandinavian Airlines Danmark
TDC
Telia
Vestas Wind Systems A/S

France

AGA
AGF
Air France
Altran
Apside
Auchan
Bouygues Telecom
Colas
Compass Group
Essilor
EuroDisney SCA
Fichet-Bauche
France Telecom
GIST
GlaxoSmithKline
Go Sport International
Groupe Caisse d'Epargne
Groupe Canal Plus
Groupe Danone
Groupe Plastic Omnium
Harry Rosen, Inc
Hertz France SAS
Jacobs France
KPMG Enterprises
La Poste
Legrand
L'Oréal
Maersk France SA
Marc Laurent SA (CELI)
Natexis Banques Populaires
NEURONES
Norisko Equipements
PSA Peugeot Citroen
Renault Trucks
SAFRAN
Schneider Electric
SNCF
Würth France
Xerox
Germany

AOK - Die Gesundheitskasse in Hessen
Degussa AG
Sanofi-Aventis Deutschland GmbH
21TORR GmbH

Hong Kong

ABN ANRO
Boyden
HSBC

India

Infosys
Intel Corporation
Zycus Infotech Pvt. Ltd

The Netherlands

A. Hak Beheer BV
Adviesbureau hr/Astrea
Ahold Albert Heijn
Amsterdam
Andarr
A-STAR Implementation & Change Management
Atnos Origin
BAM Civiel
Bureau Van Mansfeld
CendrisBSC
Center Parcs Europe NV
FiNext
ING Group
Intel International
KLM Royal Dutch Airlines
Luba Groep BV
McAfee
MHI Equipment Europe BV
Ministerie van Volksgezondheid, Welzijn en Sport
NautaDutilh
Nederlandse Spoorwegen
OPG Groep
Palo Alto, US
Philips
ProRail
Rabobank
Reed Business Information
Reed Business Information BV
ROI
SCC
Shell
Sogeti Nederland BV
Solvay Pharmaceuticals BV

**Singapore**

Central Provident Fund Board
Lilly Systems Biology

**UK**

Adobe Systems Europe
Barclays
British Engines Ltd
Cendant Travel Distribution Services (TDS)
Central Development Consulting
Christian Salvesen
CooperVision
David Lloyd Leisure
De Montfort University
Enterprise Rent-A-Car
Getfeedback
Hewlett-Packard
HSBC
IDX Systems UK
ITV plc
L’Oréal
Merrill Lynch
Millbrook Industries Ltd
NRG Group
Panasonic Europe
Remuneration Economics
Rolls-Royce
Sense
Serco Limited
Serco Solutions
Smith & Nephew plc
Sodexo
Sue Ryder Care
TCH Consultancy Services Ltd
TFL
Thomson Financial
Thomsons Online Benefits
Turner & Townsend LLP
Universal Music
Virgin Retail Ltd
Wagamama Ltd
Wincanton

US

1-800-GOT-JUNK?
A Balanced Approach, LLC
AA
ACE INA
Acxiom Corporation
Adhesives Research
Aijon Consulting
Alliance Capital Management LP
Allstate Insurance Company
Amarillo Globe-News
AmCOMP
American Express
Apex Systems, Inc.
Aramark
AstraZeneca
ATS Health Services
Atwood Oceanics
Babson College
Bally Total Fitness
Barbara's Bakery, Inc
Bechtel National, Inc
BigFix Inc
Brinker International
Busch Entertainment Corporation
Canyon Ranch
Career Consultants Staffing Services, Inc
Central Peninsula General Hospital
Central Washington Hospital
Cheskin
Children's Home Society of Florida
CNH America, LLC
Columbia MedCom Group
Convergys
Covenant Health
CPGjoblist
Cracker Barrel Old Country Store, Inc
Customized Career Consulting
Deacon Group, Inc.
Deb Hester & Associates
Deragon
Devon James Associates, Inc
eFunds Corporation
Executive Impact
Executive Power Brand
Executive Smarts, LLC
Exempla Healthcare
Express Personnel Services
Florida Hospital Memorial System
Ford Motor Company
fpBioMed
Franklin Atlantic
Fujitsu Consulting
Getronics
GreenbergFarrow
Hammars Construction, Inc
HP
Human Resources Staffing
Hyperion
ICC
Integra Rehabilitation
IntegraMed America
InterDigital Communications Corporation
Interval International
Jacobs Engineering Group
John Muir/Mt. Diablo Health System
Julio & Sons Company
Juniper Networks
Kearney Hub
Kforce Technology Staffing
Leo Burnett USA
Madame Tussauds U.S.
Marketing Acumen
Mason & Kichar
Memorial Healthcare System
Mercedes-Benz USA, LLC
Meridian Health
Mirant
Morton Plant Mease Health Care
Mosteller & Associates
MPD Services dba Talent Tree
MRI
Nationwide Insurance
New York Power Authority
Next Estate Communications
NPG
Panera Bread
PetSmart
PontusOne
PrideStaff
Putnam Hospital Center
Rada Advertising, Inc.
Raines International, Inc
Randstad North America
ReachingTalent, LLC
Recruitment Enhancement Services
Redlake, Inc.
Remedy Intelligent Staffing
Resources Global
RetiredBrains.com
Reuters
Revival Home Health Care, Inc.
Rite of Passage
RMA of New Jersey LLC
Ryder
San Gabriel Valley Medical Center
SAS Institute
Scientific Games
Shaker
Siemens Communications, Inc
Skilset Communications
Spencer Stuart
St. John Macomb Hospital
St. Jude Medical Center
St. Vincent Hospital and Health Care Center, Inc
Sterling Commerce
STP Nuclear Operating Co.
TEKsystems
The Advisory Board Company
The Employment Guide
The Innis Company
The Osborn
The Toro Company
TMC HealthCare
Tribridge, Inc
Truly Yours
UHY Mann Frankfort Stein & Lipp Advisors
University of Tennessee
Urban Science
Visiting Health Services of New Jersey, Inc
VPSI Inc.
Washington State Department of Natural Resources
Waste Management
Welch Allyn
Whirlpool Corporation
Whitridge Associates
Wilcox Miller & Nelson
WorldatWork
Yum! Brands, Inc
# RESULTS BY COUNTRY BREAKDOWN*

Global Tabulations—Total Respondents

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<td>9%</td>
<td>3%</td>
<td>0%</td>
<td>14%</td>
<td>15%</td>
<td>2%</td>
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<td>3%</td>
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<tr>
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<td>23%</td>
<td>7%</td>
<td>19%</td>
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2. What industry do you work in?

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3. Gender

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4. Years of HR experience

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5. Years with present company

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*The breakdown is for countries with 21 or more completed surveys.
### Global Tabulations—Total Respondents

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<td><strong>8. Where do you recruit?</strong></td>
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### MAIN SURVEY

1. How Employer Branding is viewed
   A solution for the consistency, style and impact of our external recruitment marketing materials.
   - The essence of our offering as an employer that is communicated internally and externally.
   - Our promise and contract to current or potential employees that defines the delivery of our HR agenda.
   22% 16% 22% 16% 0% 22% 42% 16% 49%

2. Organization formally support an Employer Branding effort
   - Yes - Continue on to next question
   - No - Skip to Q7
   83% 66% 50% 64% 67% 57% 71% 61% 31%

3. If “Yes,” in which ways?
   - Integrated brand communications
   - Business principles/mission
   - Workplace initiatives
   - Dissemination of organizational objectives and strategies
   - Community relations
   - Organizational structure and reporting
   - Supplier/partner initiatives
   - Other
   79% 80% 85% 85% 92% 62% 69% 76% 91%

---

Global Employer Brand Study
## Global Tabulations—Total Respondents

<table>
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<tr>
<th></th>
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<th>US</th>
<th>UK</th>
<th>Austr/NZ</th>
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### 4. If organization does not support Employer Branding, informal ad hoc initiatives undertaken periodically
- Yes: 51% 35% 33% 73% 89% 54% 75% 72% 30%
- No: 49% 65% 67% 27% 20% 46% 25% 28% 70%

### 5. Plans to formalize any of those initiatives in the near future
- Yes: 43% 27% 19% 52% 82% 35% 52% 56% 19%
- No: 57% 73% 81% 48% 18% 65% 48% 44% 81%

### 6. Envision a formal Employer Branding program within 5 yrs
- Yes: 51% 94% 52% 93% 93% 75% 60% 56% 30%
- No: 49% 66% 48% 7% 25% 20% 44% 70%

### 7. Key expectations of Employer Branding?
- Ease in attracting candidates: 84% 81% 84% 94% 95% 86% 92% 68% 83%
- Recognition as employer of choice: 82% 83% 92% 87% 76% 81% 92% 73% 72%
- Increased retention rate: 85% 60% 75% 87% 38% 64% 42% 56% 69%
- Shortened time to fill: 93% 50% 41% 54% 23% 54% 35% 68% 72%
- Delivery of vision and values program: 92% 50% 62% 48% 29% 57% 67% 66% 17%
- Higher job acceptance rate: 80% 54% 85% 56% 19% 36% 21% 51% 17%
- Increase in number of unoxidized resumes: 35% 35% 35% 59% 43% 36% 38% 57% 23%
- Setting a standard and framework for all-HR activity: 37% 41% 62% 46% 24% 45% 17% 36% 22%
- Increased appreciation for people activity amongst water business: 34% 33% 57% 54% 38% 38% 35% 19% 6%
- Benefits to the service delivered to commercial customers: 32% 37% 65% 27% 14% 36% 21% 27% 3%
- Larger number of internal fills: 74% 76% 49% 43% 54% 71% 31% 8% 4%
- Other: 4% 1% 3% 4% 5% 3% 4% 11% 0%

### 8. Organization has conducted in support of branding initiatives
- Current employee studies: 70% 71% 79% 94% 94% 78% 10% 70% 94%
- Industry best practice/benchmark research: 52% 50% 53% 87% 47% 55% 87% 32% 33%
- Applicant Tracking System: 46% 52% 47% 31% 32% 49% 83% 51% 22%
- Employee referral program: 47% 71% 89% 43% 28% 38% 38% 38% 17%
- Customer research (satisfaction, relationship management programs): 43% 47% 44% 41% 47% 38% 19% 62% 53%
- Competitive intelligence and brand positioning analysis: 35% 38% 47% 29% 47% 33% 11% 49% 33%
- Web site usability studies: 31% 20% 35% 29% 37% 28% 43% 65% 17%
- External market perceptions studies amongst target talent: 27% 25% 39% 31% 47% 16% 32% 46% 3%
- Additional research program specifically for Employer Branding: 12% 13% 21% 20% 5% 6% 2% 16% 0%
- Other: 2% 0% 3% 2% 0% 4% 0% 8% 0%
## Global Tabulations—Total Respondents

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Global Tabulations—Total Respondents

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The Bernard Hodes Global Network was formally established in 1994—the first-ever network within the industry. The Network has been built by ensuring “best-in-class” capability that reflects the market dynamics in each territory. Both locally and globally, the Network offers customers expertise in: resourcing strategy development; recruitment communications; employer branding; e-recruitment and online media. The Network is the international “arm” of U.S.-based Bernard Hodes Group (http://www.hodes.com). Bernard Hodes Group is part of Omnicom Group, Inc. (NYSE – OMC) (www.omnicomgroup.com), a leading global marketing and corporate communications company.

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