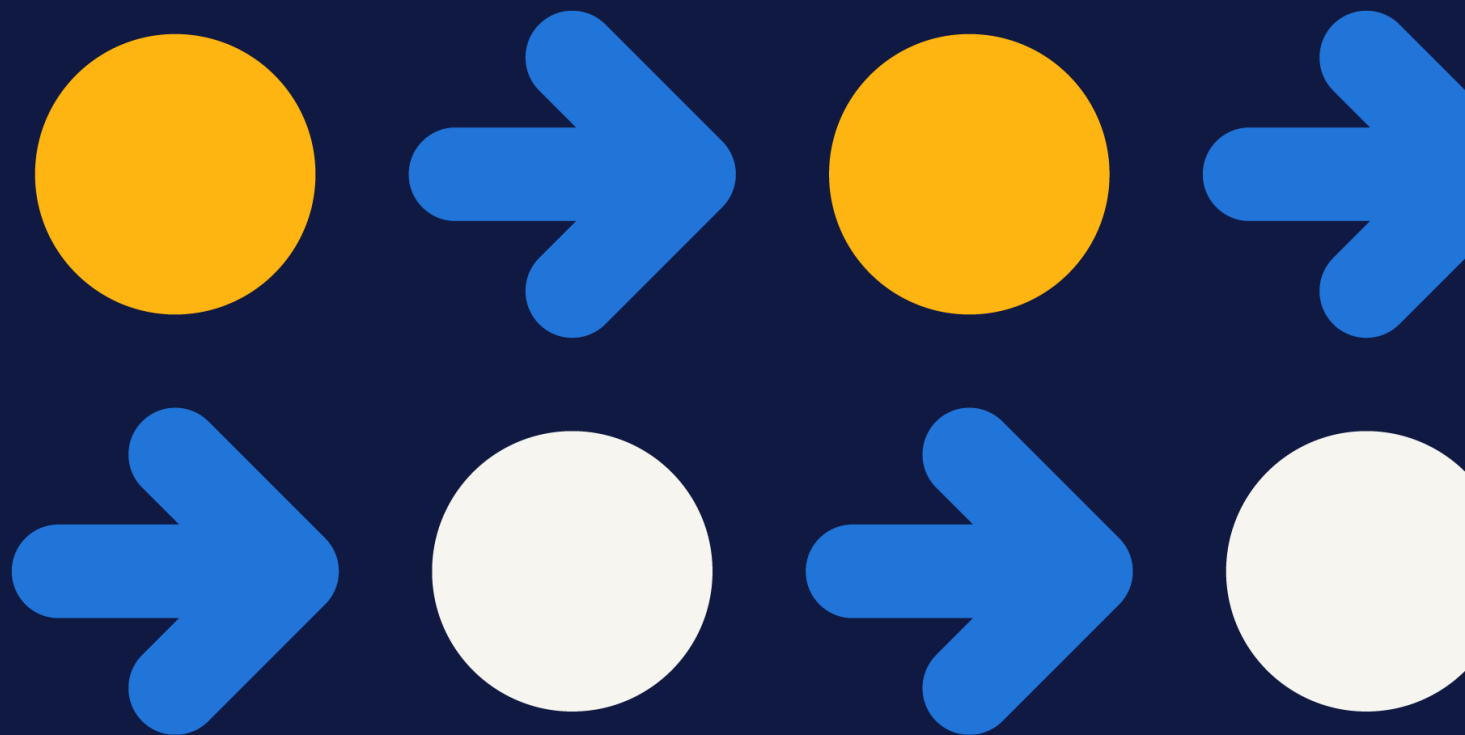


employer brand research 2021



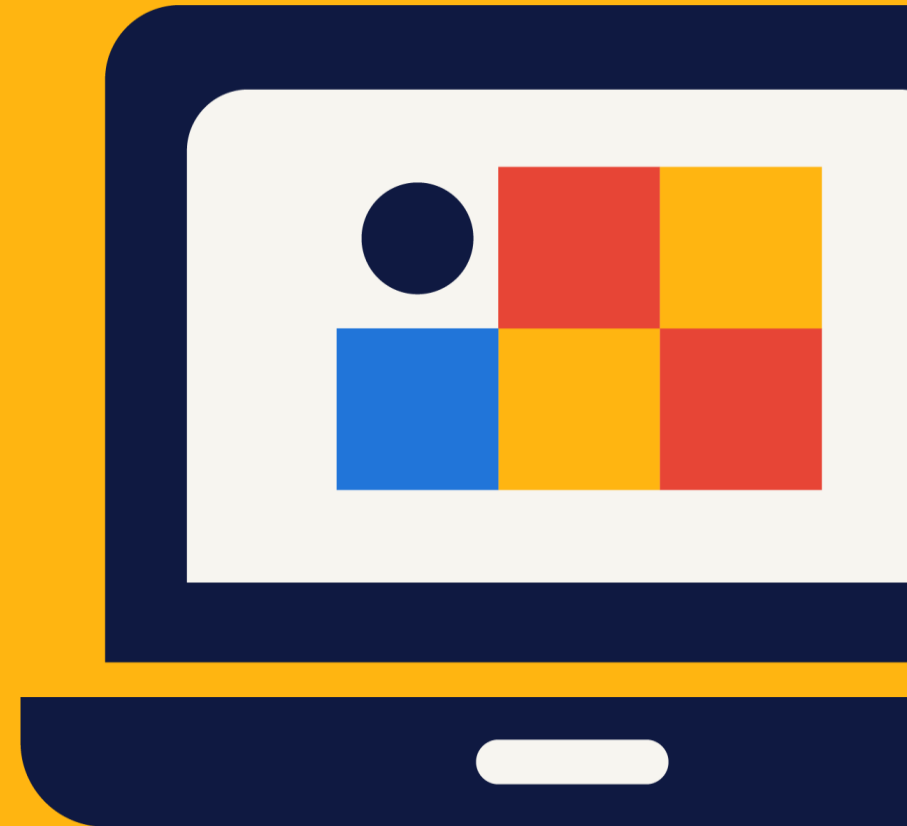
kazakhstan.

 randstad

human forward.

content.

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



what is the randstad employer brand research?

- a representative employer brand research based on perceptions of the general audience. 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 100 largest employers 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

- 3,502 respondents

fieldwork

- online interviews
- january 2021

length of interview

- 16 minutes



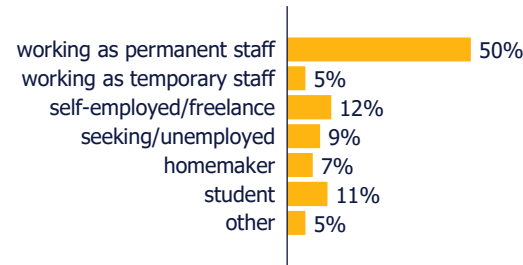
sample composition in kazakhstan

socio-demographics, employment status, region.

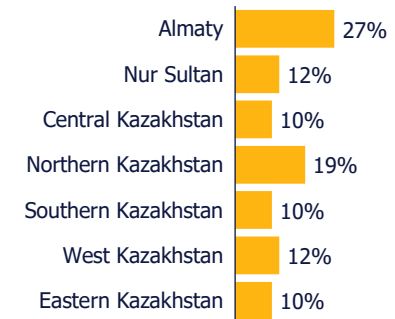
gender



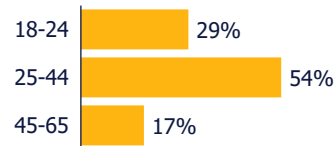
employment status



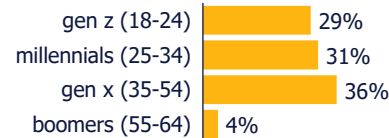
region



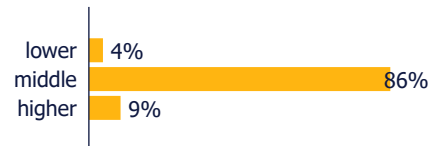
age



generation



education



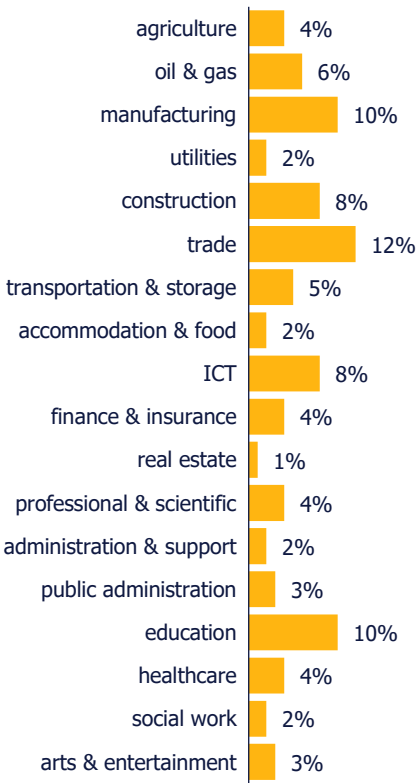
total sample: 3,502
fieldwork: january 2021



sample composition in kazakhstan

sector, function.

sector



function



base: currently employed (n=2,362)



kazakhstan

employer attractiveness.



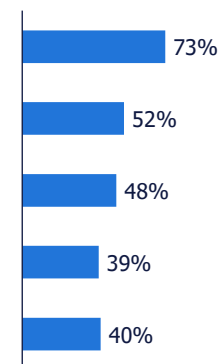
what potential employees want

the 5 most important drivers when choosing an employer.

top 5 most important drivers

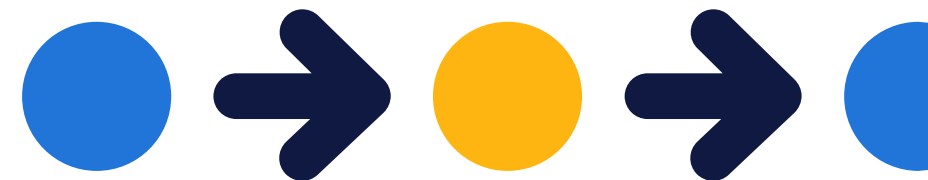


kazakhstan
2020



kazakhstan
2019

cis
2021



*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

Salary & benefits are by far the most important driver for all employees and scores highest among women, the older age groups, and higher educated employees. Furthermore, these are the employees who are more demanding overall as they consider around 8 to 9 drivers as essential. Men, younger employees, and lower-educated employees consider fewer drivers as important. A COVID-19 safe work environment (32%) is the least important driver for employees; however, women do feel more strongly towards this driver than men. Career progression can be seen as an important driver among women, 25–34-year-olds, and your middle to higher-educated employees.

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

employers' proposition

a good reputation and financially healthy

Employees in Kazakhstan rate their own employers highest on having a good reputation and being financially healthy. The lowest rating given by employees is for the possibility to work remotely (41%), however, employees living in Almaty (48%), rate their employer higher on this attribute when compared to all other regions (average 36%). Furthermore, career progression, although not rated as a top attribute for employers, the 18-34-year-olds do rate their employer higher on this than what the older employees do.

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

recommended employer focus

career progression and salary & benefits

Career progression is an important driver among employees this year and is especially true for women, those aged between 25-34, and your middle to higher-educated employees. The average employer in Kazakhstan receives a low rating on this driver by its employees. It is therefore recommended that the average employer in Kazakhstan pay more attention to employee career progression. Furthermore, employees rate their salary & benefits as one of the lowest drivers offered by their employer, despite this being an important driver for employees. As this is a consistent driver coming up among employees, it may be worthwhile keeping this element in mind when focusing on employees' needs.

what do potential employees want

job collars in focus.

white-collar

74%

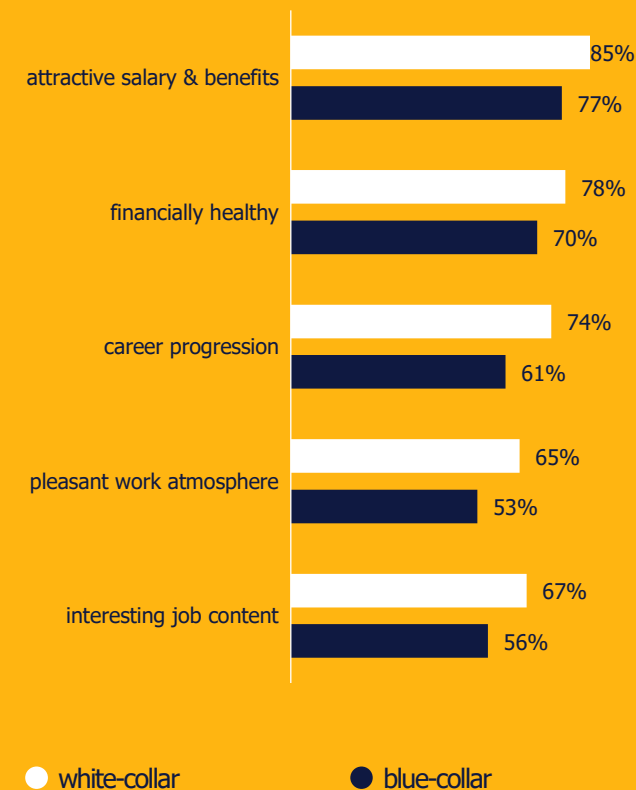
of white-collar employees are far more interested in career progression than blue-collar workers. A company's financial health and attractive salary and benefits are also important among this group.

blue-collar

55%

of blue-collar workers consider job security as important as the white-collar employees, however it can be seen that this group rates all other attributes of less importance when compared to white-collar peers.

most important attributes



job-switching behavior



in focus.

switching behavior finding another employer.

Almost 1 in 6 Kazakh changed employer

17% Of Kazakh employees changed their employer over the past 6 months. Furthermore, another 32% intend to switch employers in the next 6 months. This varies among the 18-54-year-olds (average 33%) compared to the 55 and older (14%) who are less likely to switch jobs in the next 6 months. For those who changed their employer (54%), work-life balance is more important than for those who plan to stay with their current employer (46%).

personal connections on top

Personal connections (48%) and job portals (38%) are the most used channels by switchers, regardless of gender or age. HeadHunter is the leading portal among employees. The younger generation (24 and younger) make more use of Google and company websites when looking for a new job compared to employees older than them.



most important attributes switchers vs. stayers.

switchers

2021

17%

changed employer in the
past 6 months.

stayers

2021

83%

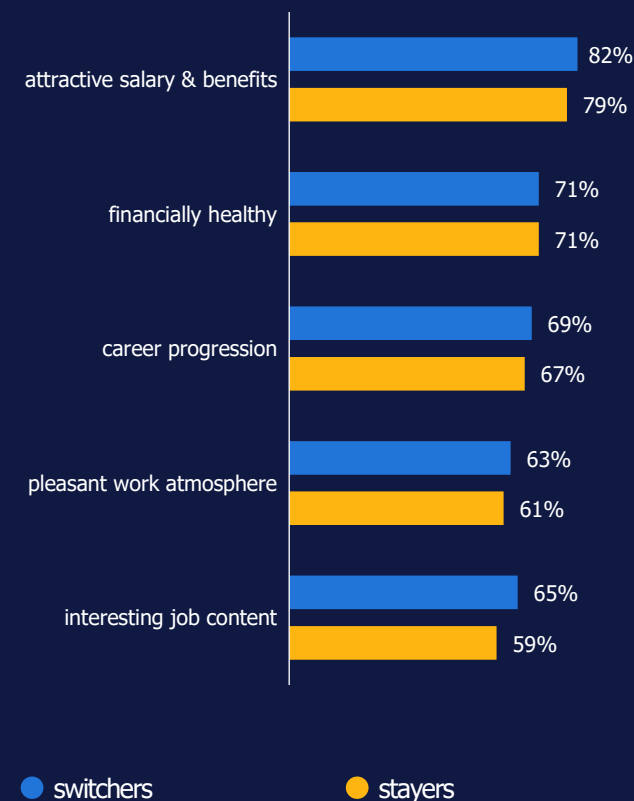
stayed with their employer
in the past 6 months.

2021

21%

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

most important attributes



switching behavior job collars in focus.

white-collar intenders

29%

of white-collar intenders plan to switch to another employer in the next 6 months. This is slightly lower than the average Kazakh employee (32%) who intends to switch employers. White-collar employees are most likely to use job portals and personal connections for finding jobs, similar to the average employee in Kazakhstan.

blue-collar switchers

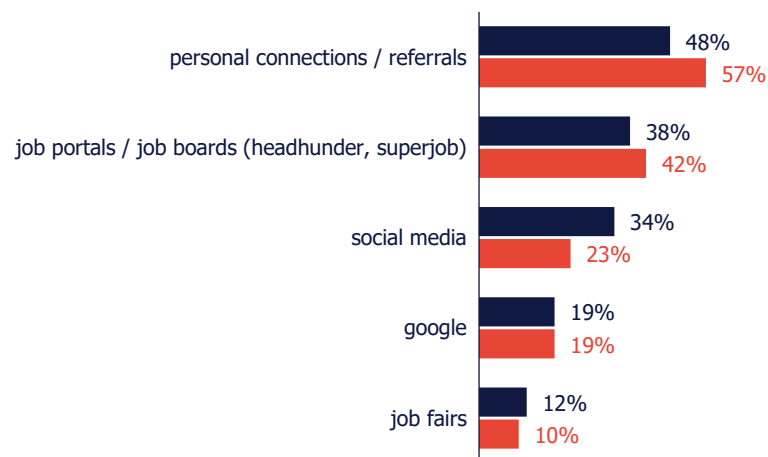
33%

of blue-collar switchers intend to change to another employer in 2021, which is not much different from the average employee in Kazakhstan who intends to switch employers.

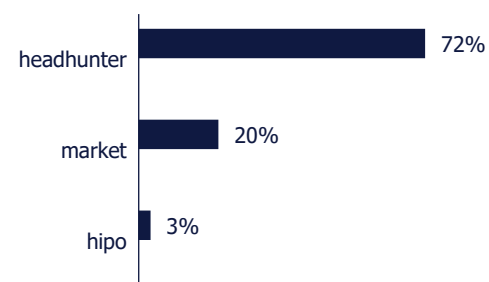


how do employees in kazakhstan find new job opportunities.

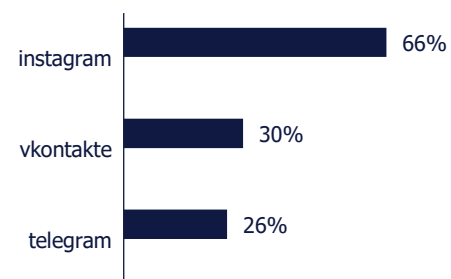
top 5 channels used to find new job opportunities



top 3 job portals



top 3 social media channels



● 2021

● 2020

COVID-19

in focus.



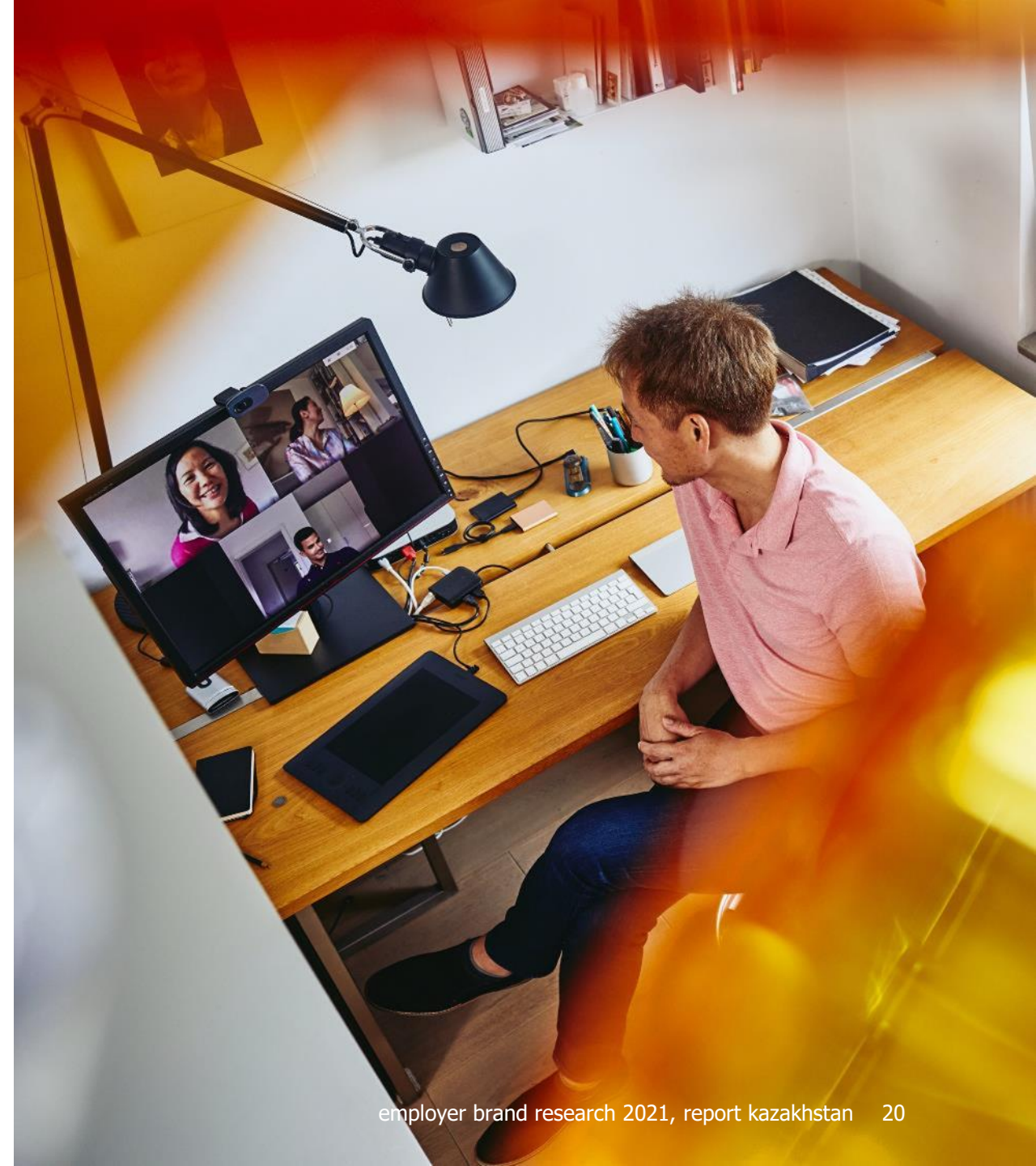
COVID-19 and its impact on the labor market.

possibility of working remotely far from important

About 2 in 5 of the Kazakh employees are attracted by the possibility to work remotely, making this driver less important to employees. Women, employees between 18-24 years old, and middle- and higher-educated employees are more inclined to rank this driver as more important, however, still trails behind the drivers that are more attractive to them. Working remotely is more important to part-time employees (41%) than for full-time employees (33%).

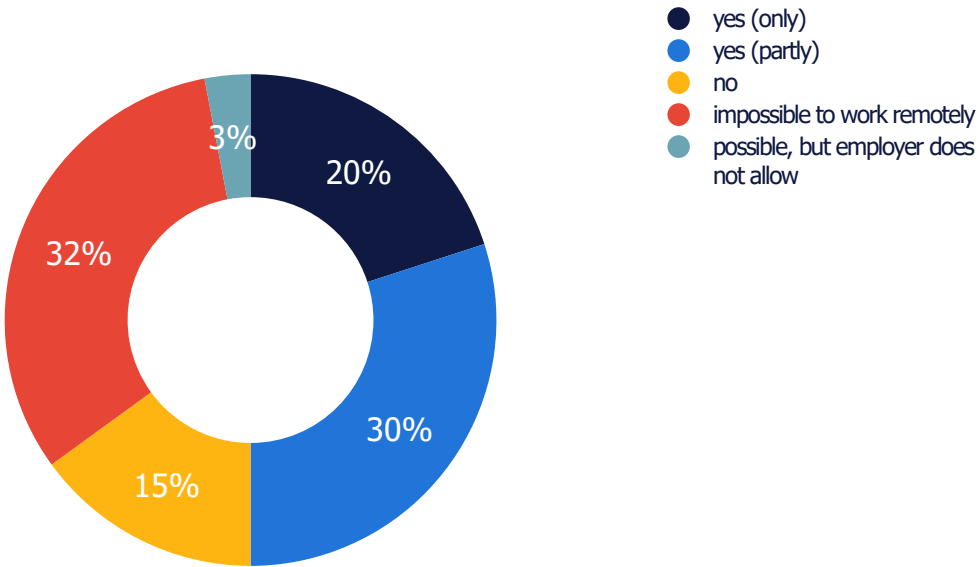
half of the employees started to work (more) remotely during COVID-19 pandemic

56% Of Kazakh employees were involved in the decision to work remotely, whereas other employees working remotely had no choice in the decision to do so. The higher-educated employees continued to work as normal (56%) as opposed to just 32% of the lower-educated employees.



remote working due to COVID-19.

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



kazakhstan

27%

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

Having an influence or not on the decision to work more remotely is a universal matter as it is not related to age and gender.

Only 3% of employees who can work from home are not allowed to do so by their employer. Next to that 32% of employees, jobs are bound to the premises which makes working from home or elsewhere impossible. This is especially true for employees based in Central (39%), Northern (38%) and Eastern (45%) Kazakhstan.

cis

X%

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

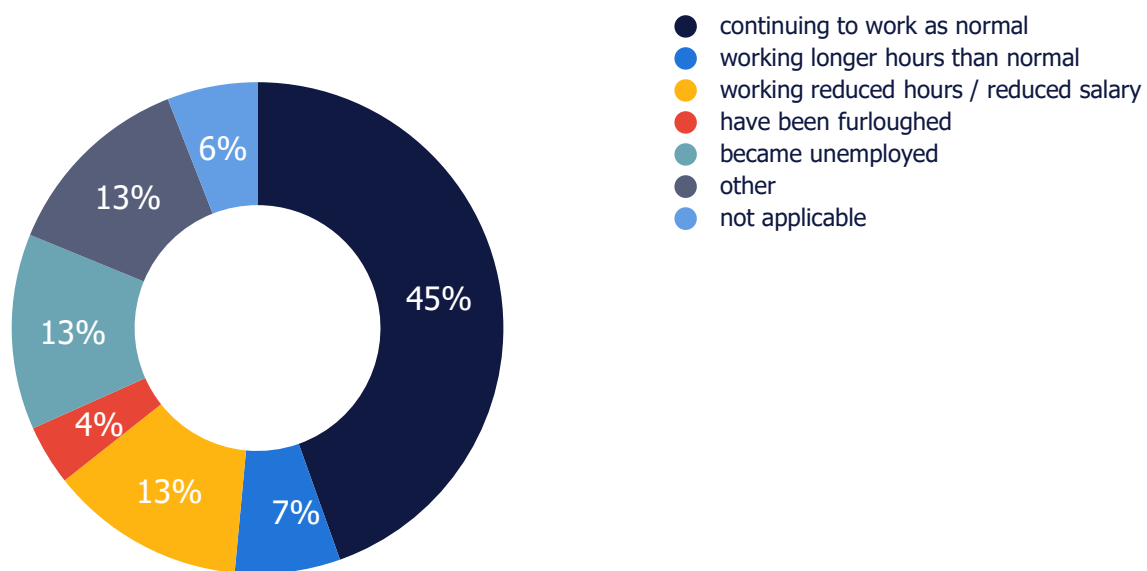
here we will look at regional differences.

here we will look at regional differences.



employment situation changes due to COVID-19.

how COVID-19 changed one's employment situation



half saw their employment situation change

50% Of employees were either furloughed, became unemployed, worked different hours than usual or for other reasons saw their employment situation change due to COVID-19.

Of those who started working reduced hours, 23% are represented by the older-aged (55-64 years old) employees.

More men (52%), those 25 and older (average 52%) and higher-educated (56%) employees continued to work as normal.

cis

X%

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

job loss fear in 2021 intention to switch.

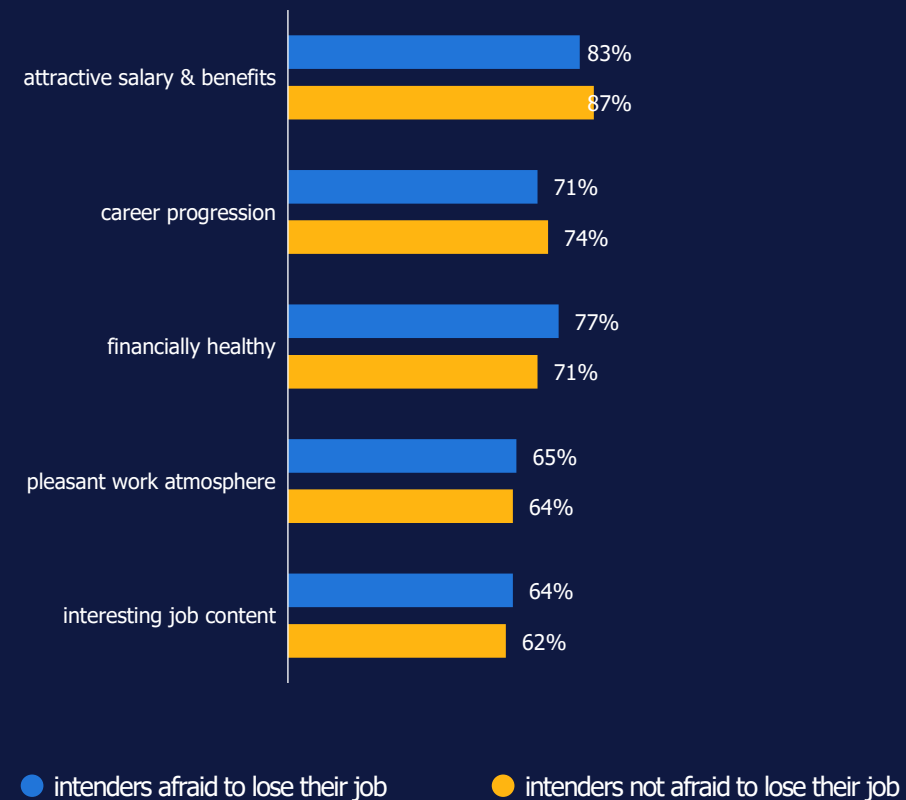
36%

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

22%

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

32%

plan to change employer in the
next 6 months.

intenders

2021

42%

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



If one's employment situation has changed due to COVID-19, the intention to change to a new employer is considerably higher (42%) than those who just intend to change employers (32%).

The way Kazakh employers have supported their employees and handled the pandemic has had a negative impact on loyalty among employees. 39% of employees feel less loyal to their employer as opposed to 23% who now feel that they are more loyal. The impact on loyalty is regardless of gender or age.

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

job loss fear in 2021 due to COVID-19.

considerable fear of losing job

Although there are more people not afraid of losing their job (41%), a substantial number of people do fear that this will happen in 2021 (33%). Men (44%) are more often not worried about losing their job. Furthermore, there are no clear differences among employees on both gender and age groups for being very worried to lose their job in 2021.

more fear of losing job

People living in West Kazakhstan (46%) are more worried about losing their job in 2021 compared to the other regions in Kazakhstan. However, in Central Kazakhstan (51%), employees are slightly less worried to lose their job



loyalty towards employers during the pandemic.

27%

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

21%

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

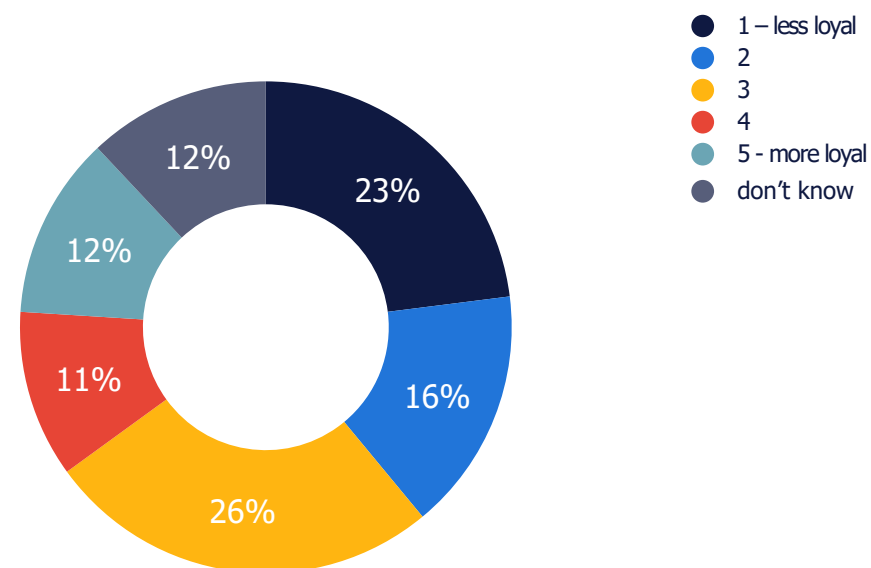
21%

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.

24%

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.

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



company specific slide.

your company

- what does it do/ what is it known for
- active in x countries: name countries

few facts about their EVP (if any)

- abc
- abc

how can the RS consultant help them

- ipient re laceatu riateni temquis coraectem volorro totasi ipsam dis sum quissinvenis enisti ut faccae
- obita qui qui as modisque pos est re, officataque dem ut atur sum nis assi nimo vollab ilit ratus, vid ut volo rem la idebis etur ressi deri dolo bearum remporenis
- alita ex ellupta tecusam que non repuda nimpe solum am dolecti re il ipsam fugiam volorum quam



let's talk.

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

randstad kazakhstan

Natalia Shcherbakova

n.shcherbakova@ancor.ru



appendix 1

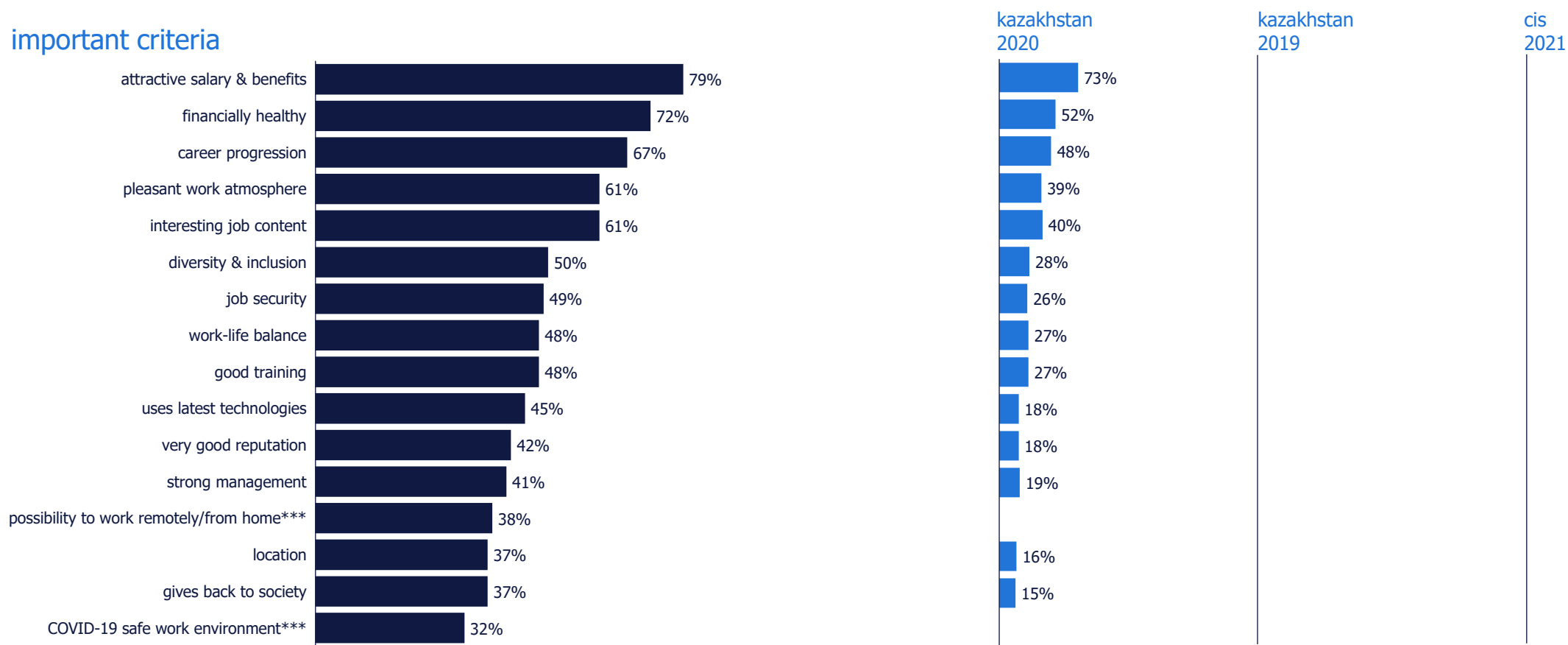
deep dive
EVP drivers.



what potential employees want

the most important criteria when choosing an employer.

important criteria

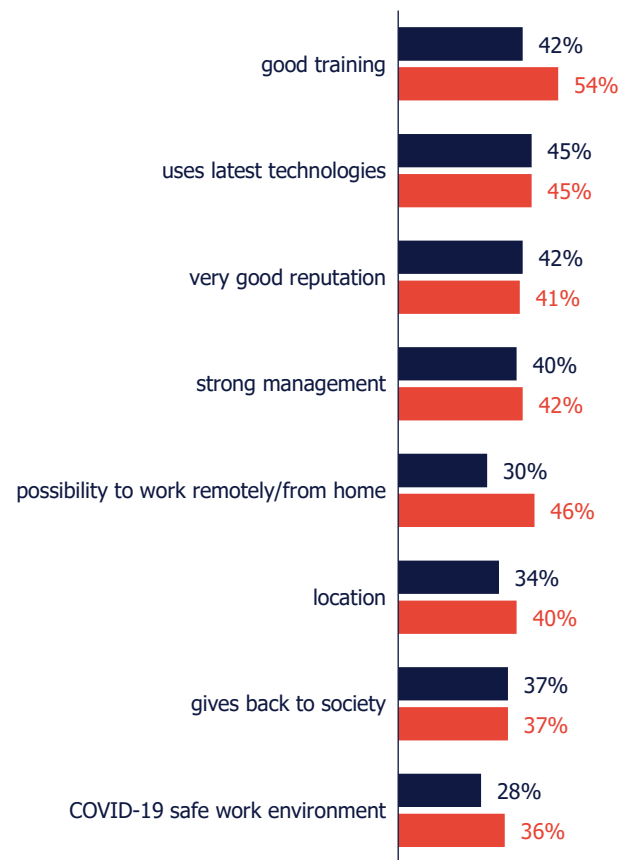
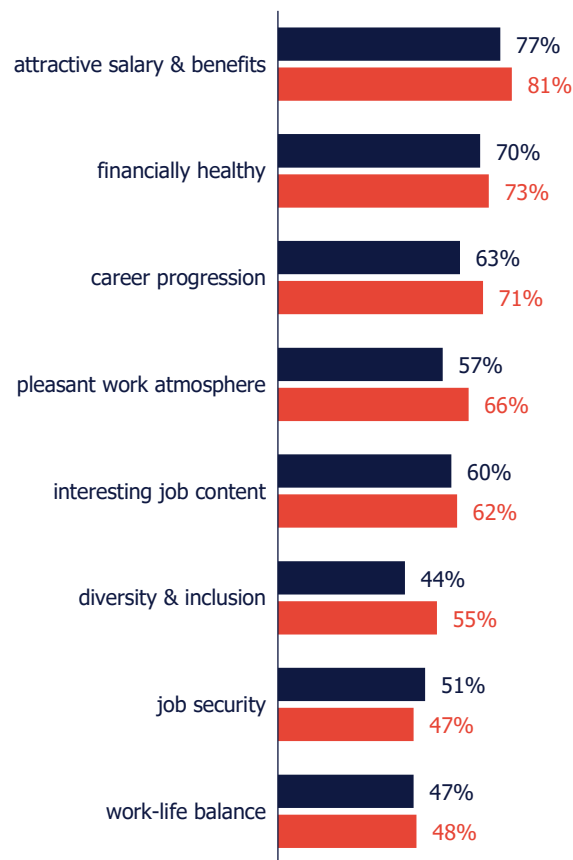


* when comparing 2021 with previous years, please note that this question has been altered in that respondents are now free to choose as many drivers as they considered important from a list of 16 drivers whilst in previous years they were forced to pick exactly 5 out of these 16.

***only researched in 2021

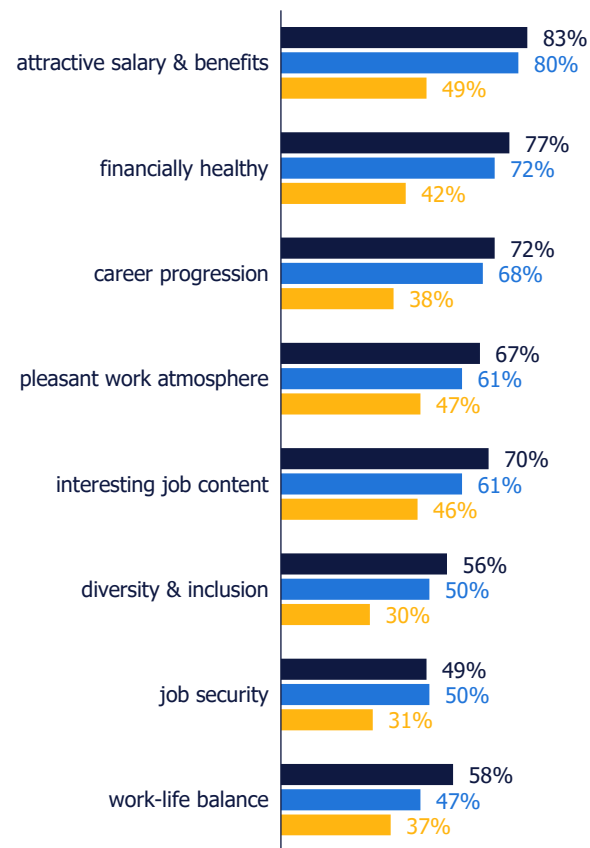


EVP driver importance by gender.



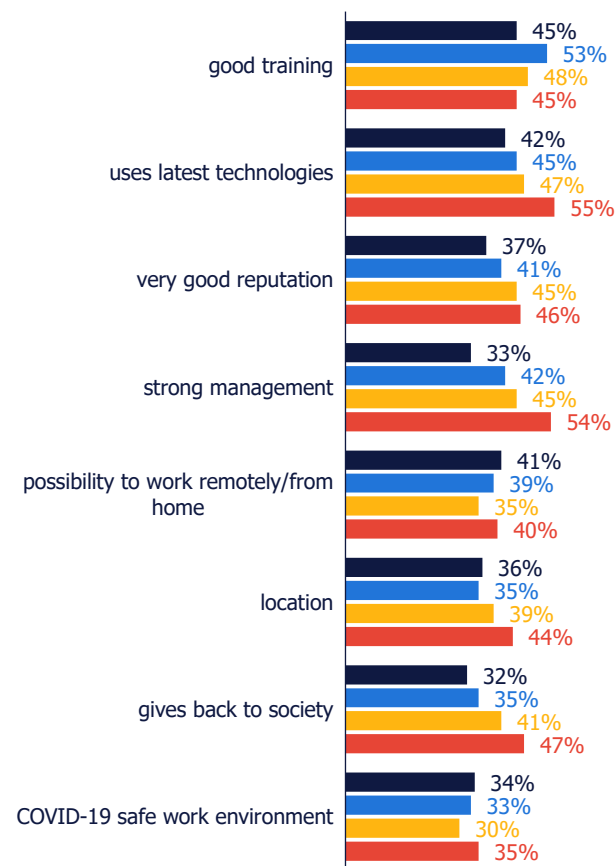
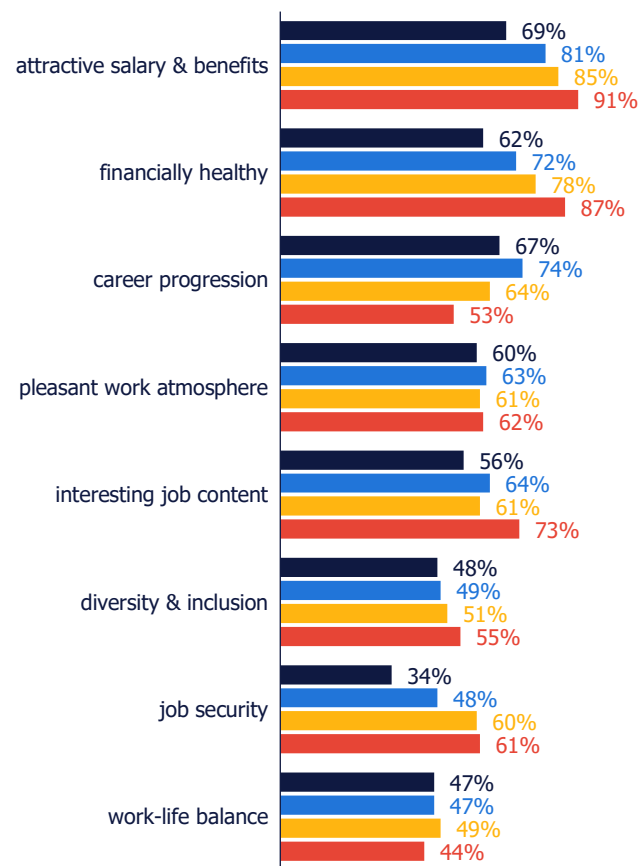
● male
● female

EVP driver importance by education.



● higher
● middle
● lower

EVP driver importance by age.



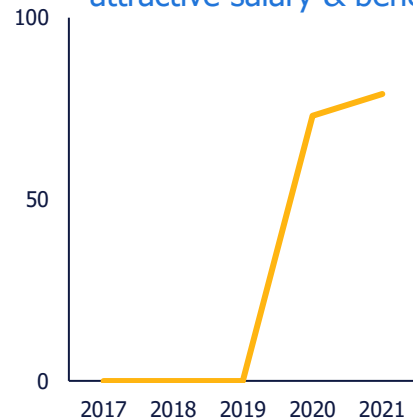
- gen z (18-24)
- millennials (25-34)
- gen x (35-54)
- boomers (55-64)



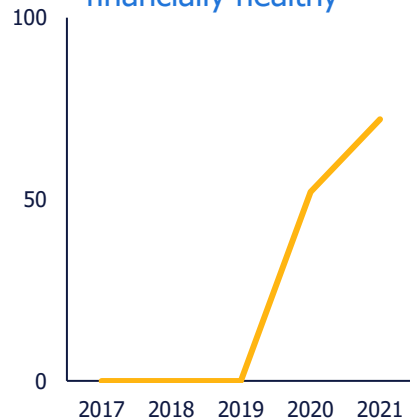
EVP driver importance trends, total.

1/2

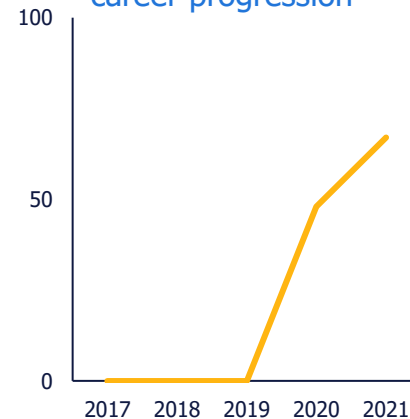
attractive salary & benefits



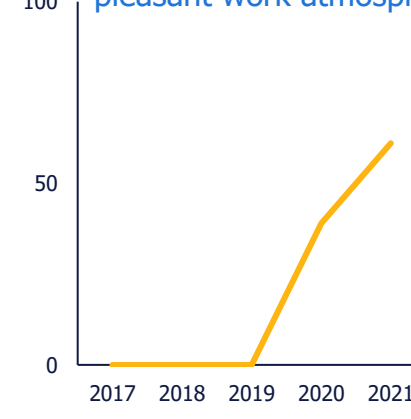
financially healthy



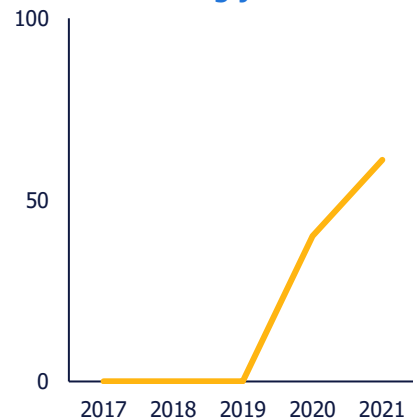
career progression



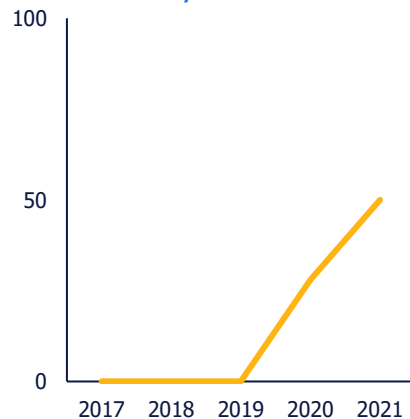
pleasant work atmosphere



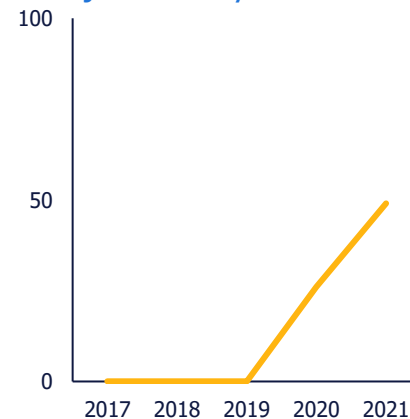
interesting job content*



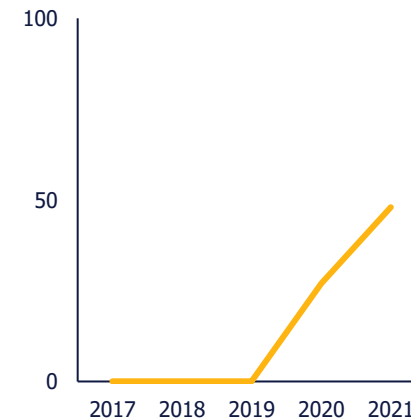
diversity & inclusion



job security



work-life balance

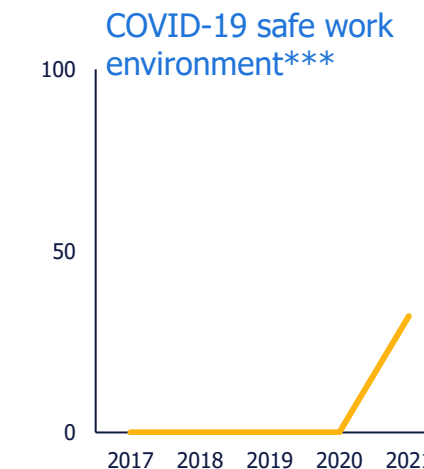
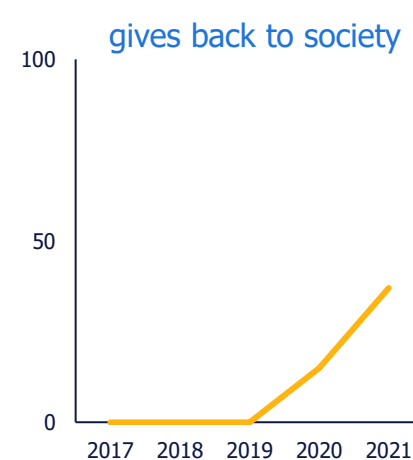
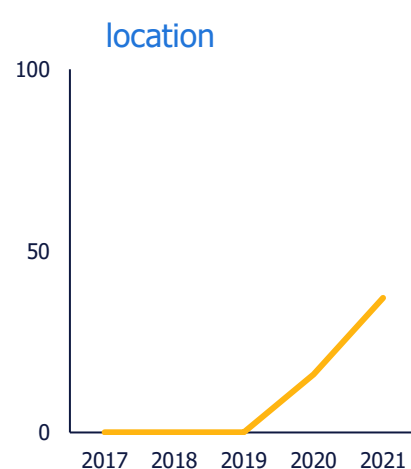
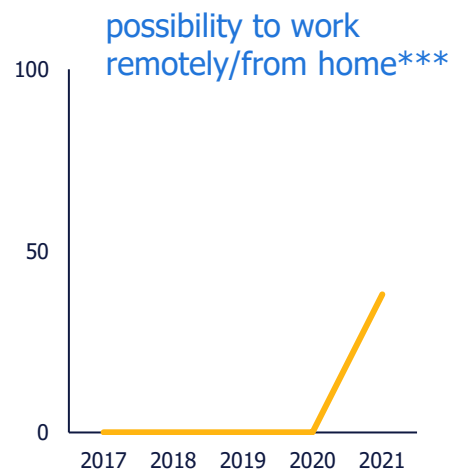
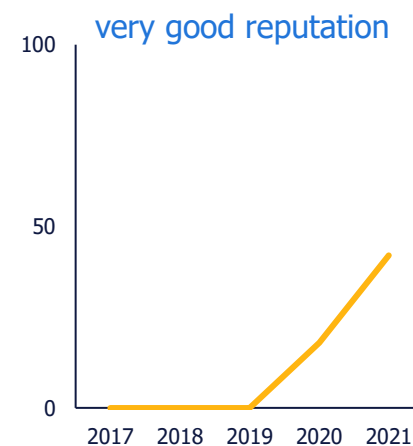
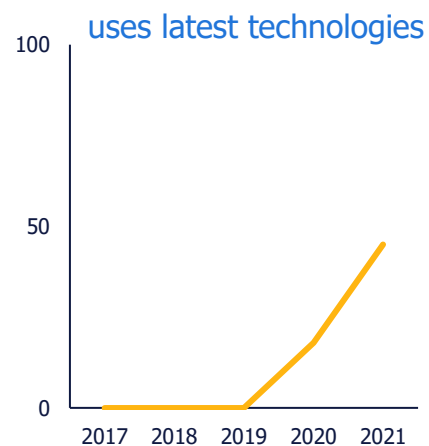


* when comparing 2021 with previous years, please note that this question has been altered in that respondents are now free to choose as many drivers as they considered important from a list of 16 drivers whilst in previous years they were forced to pick exactly 5 out of these 16.



EVP driver importance trends, total.

2/2



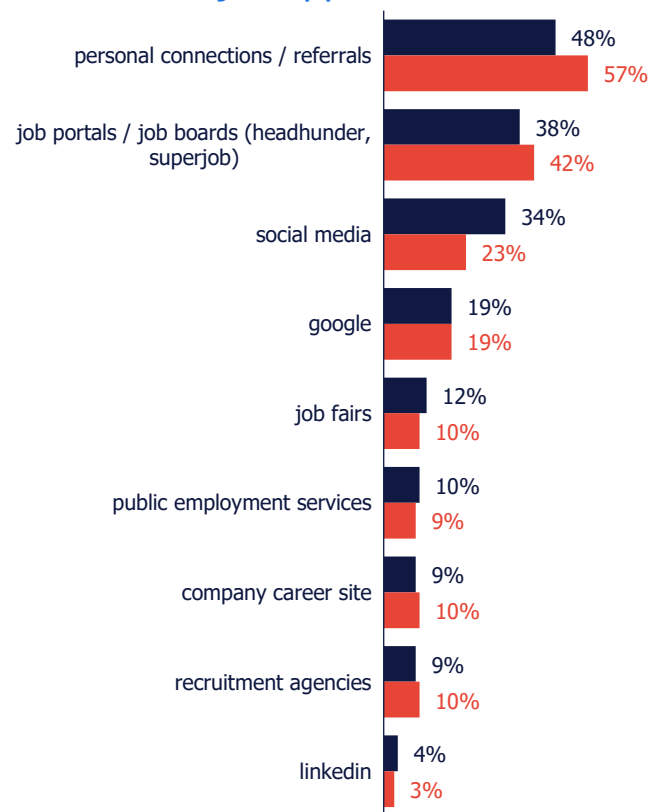
* when comparing 2021 with previous years, please note that this question has been altered in that respondents are now free to choose as many drivers as they considered important from a list of 16 drivers whilst in previous years they were forced to pick exactly 5 out of these 16.

*2017: work that is stimulating and challenging ***only researched in 2021

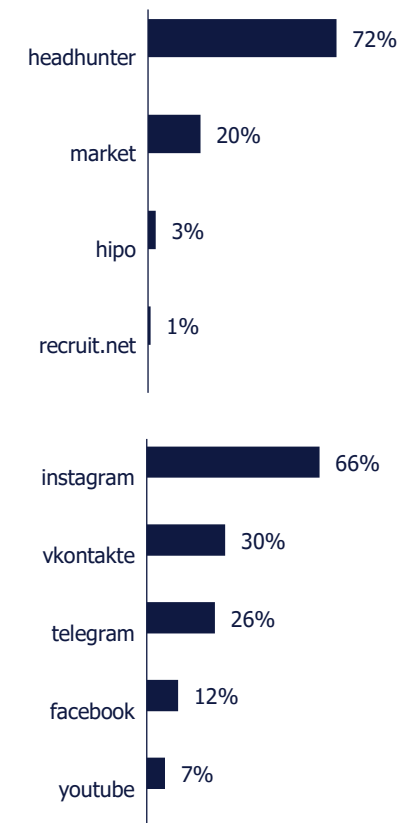


how do employees in kazakhstan find new job opportunities.

channels used to find new job opportunities



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



● 2021

● 2020



appendix 2



deep dive
employers.

perception of employer offer in kazakhstan.

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 pleasant work atmosphere
- 05 COVID-19 safe work environment
- 06 gives back to society
- 07 work-life balance
- 08 attractive salary & benefits
- 09 career progression
- 10 possibility to work remotely/from home

general perception of employers in kazakhstan

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

perception of employer offer in kazakhstan and the region.

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



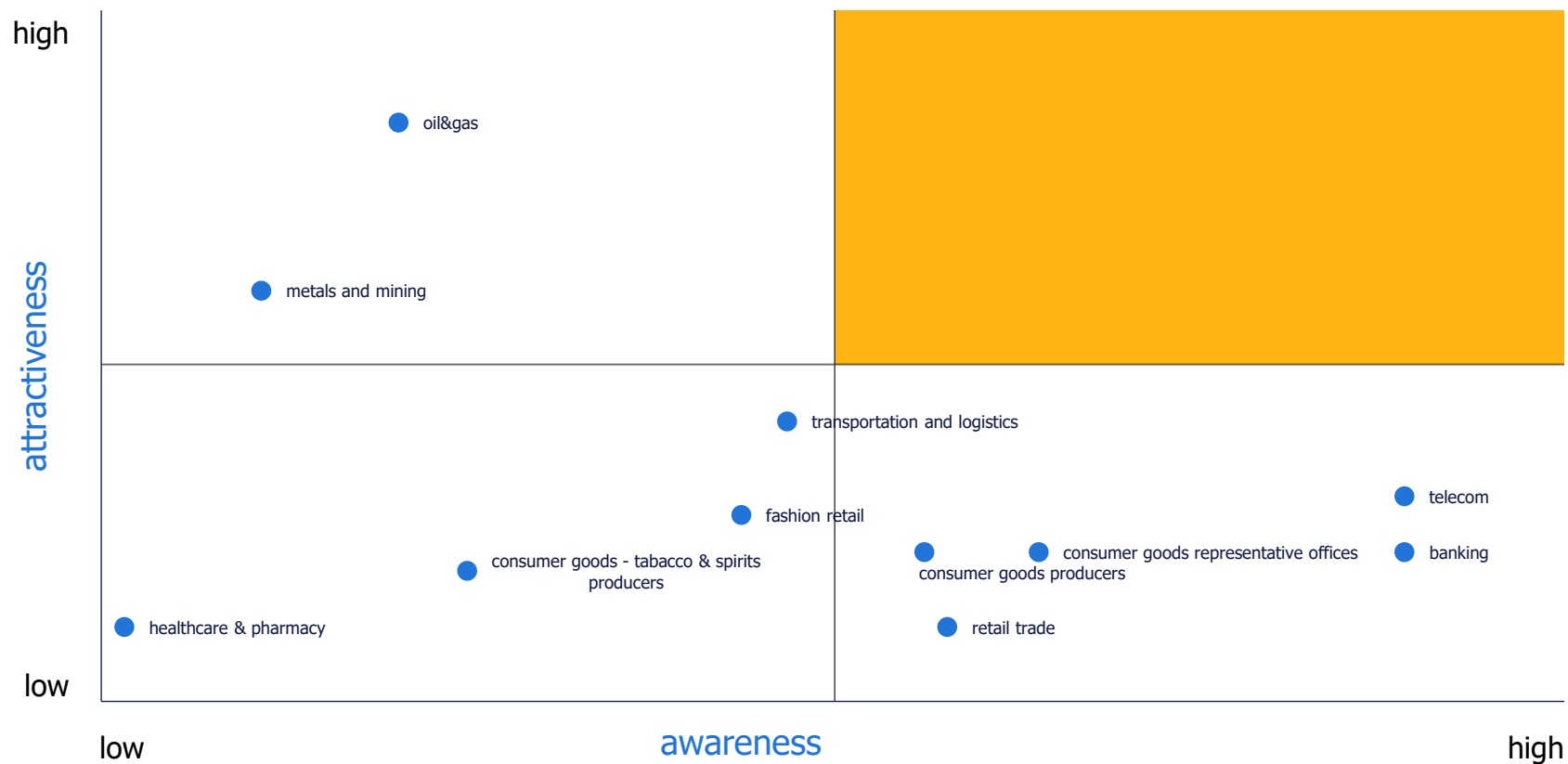
employers in kazakhstan are perceived to offer	employers in cis are perceived to offer
01 very good reputation	01
02 financially healthy	02
03 COVID-19 safe work environment	03
04 gives back to society	04
05 job security	05
06 attractive salary & benefits	06
07 pleasant work atmosphere	07
08 career progression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

sector

insights.



top performing sectors in kazakhstan 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.



kazakhstan's best performing companies by sector.

1/2

sector	top 3 companies		
	1	2	3
01 oil&gas	Tengizchevroil	Karachaganak Petroleum Operating	KMG
02 metals and mining	KAZ Minerals	Kazatomprom	Eurasian Resources Group
03 transportation and logistics	Air Astana	SCAT Airlines	DHL
04 telecom	Kaztranscom	Beeline	Kazakhtelecom
05 fashion retail	Inditex	Adidas	Fashion Retail Kazakhstan (Lasenza, Gap, Marks and Spencer, Topshop Topman, Monsoon, ALDO, La Senza, ZIDDY, Jennyfer, Flormar, Tape A L Oeil)
06 consumer goods representative offices	LVMH	Mars (Mars, Snickers, Milky Way, Twix, Bounty, Pedigree)	L'Oreal
07 consumer goods producers	Coca Cola	Rakhat	RG BRANDS
08 banking	Kaspi Bank	Sberbank	First Heartland Jýsan Bank
09 consumer goods - tobacco & spirits producers	Philip Morris	JTI	Geom (Wimpex)
10 healthcare & pharmacy	Viva-pharm (BoxGripal, Vitamin C + Zink, Vitamin C 500 Viva Pharm, Laringal)	Dr.Reddy's	Stada (Gexicon, Grippostad C, Androdoz, Proctozan, Khondroxid)



kazakhstan's best performing companies by sector.

2/2	top 3 companies		
sector	1	2	3
11 retail trade	Meloman	Technodom	Sulpak

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

1/2

sector	top 3 EVP drivers		
	1	2	3
01 oil&gas	financially healthy	attractive salary & benefits	very good reputation
02 metals and mining	financially healthy	job security	very good reputation
03 transportation and logistics	financially healthy	very good reputation	COVID-19 safe work environment
04 telecom	financially healthy	COVID-19 safe work environment	very good reputation
05 fashion retail	very good reputation	financially healthy	pleasant work atmosphere
06 consumer goods representative offices	very good reputation	COVID-19 safe work environment	financially healthy
07 consumer goods producers	very good reputation	financially healthy	COVID-19 safe work environment
08 banking	financially healthy	very good reputation	COVID-19 safe work environment
09 consumer goods - tobacco & spirits producers	very good reputation	financially healthy	COVID-19 safe work environment
10 healthcare & pharmacy	financially healthy	very good reputation	COVID-19 safe work environment



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

2/2	top 3 EVP drivers		
sector	1	2	3
11 retail trade	very good reputation	financially healthy	COVID-19 safe work environment



top



employers.

top employers to work for in kazakhstan.

top 10 employers 2021

- 01 Tengizchevroil
 - 02 Karachaganak Petroleum Operating
 - 03 Air Astana
 - 04 KMG
 - 05 CNPC AMG
 - 06 KAZ Minerals
 - 07 Kazatomprom
 - 08 LVMH
 - 09 Eurasian Resources Group
 - 10 Mars (Mars, Snickers, Milky Way, Twix, Bounty, Pedigree)
-

top 10 employers 2020

- 01 Tengizchevroil
 - 02 Karachaganak Petroleum Operating
 - 03 LVMH
 - 04 KMG
 - 05 Air Astana
 - 06 Kazatomprom
 - 07 Apple City Distributors
 - 08 Astana Motors
 - 09 KAZ Minerals
 - 10 MangistauMunaiGas
-

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

top 5 companies	1	2	3
1 Tengizchevroil	financially healthy	very good reputation	attractive salary & benefits
2 Karachaganak Petroleum Operating	financially healthy	attractive salary & benefits	very good reputation
3 Air Astana	financially healthy	very good reputation	attractive salary & benefits
4 KMG	financially healthy	attractive salary & benefits	very good reputation
5 CNPC AMG	financially healthy	attractive salary & benefits	job security

kazakhstan's top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	Karachaganak Petroleum Operating	Tengizchevroil	KMG
financially healthy	Karachaganak Petroleum Operating	Tengizchevroil	CNPC AMG
career progression	KAZ Minerals	Tengizchevroil	KMG
pleasant work atmosphere	Air Astana	Meloman	LVMH
job security	Tengizchevroil	Karachaganak Petroleum Operating	KMG
work-life balance	Faberlic	Mary Kay	AVON
very good reputation	Tengizchevroil	Coca Cola	Karachaganak Petroleum Operating
possibility to work remotely/from home	AVON	Faberlic	Oriflame
gives back to society	Air Astana	Tengizchevroil	Kaspi Bank
COVID-19 safe work environment	Karachaganak Petroleum Operating	Sberbank	Kaspi Bank

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.

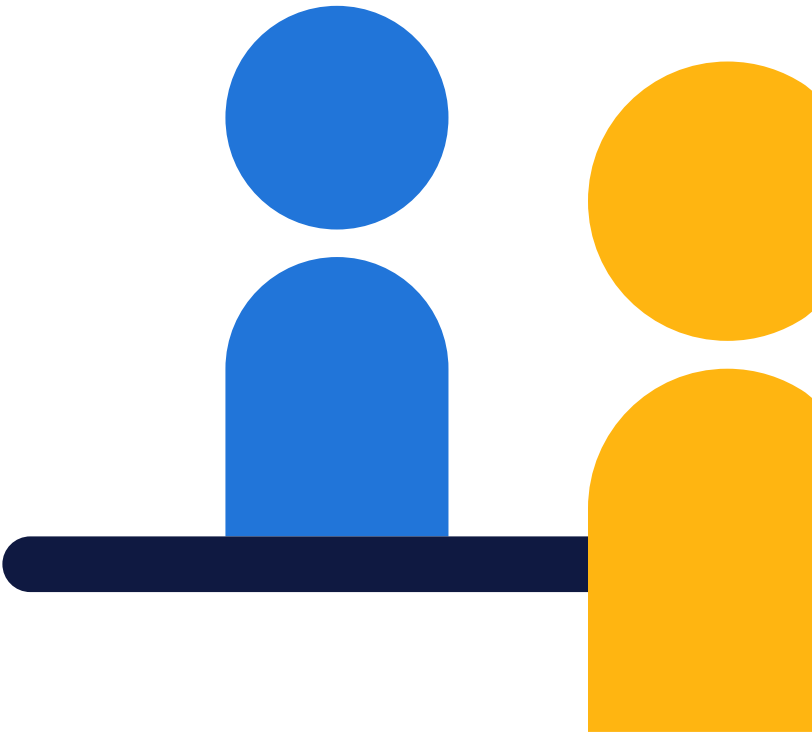
drivers

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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human forward.

