

REPUTATION
& THE WAR
FOR TALENT
CORPORATE
REPUTATION
WATCH 2008

INTRODUCTION

In almost every conversation I have had with a senior business executive over the past three years, one consistent theme has emerged. How do we recruit and retain the best talent? How can we win the talent war?

As the world economy globalizes so does our talent. To be a world leader it is not good enough just to employ the best people in your home market – you need the best people in every market. That pool of superior talent is limited, which is one of the factors driving sharp increases in senior executive pay.

But this war for talent doesn't just exist in the C-Suite. Talent doesn't just come into scarce supply when it reaches the age of 40 - this shortage is moving right down the supply chain, and in a world where we have seen failures in reputation destroy companies and with it the CV value of employees. Money is not, in itself, enough.

We wanted to understand the role of reputation in this war for talent. How important is corporate reputation in attracting today's brightest and best?

We interviewed MBA students at some of the World's leading business schools and some very clear trends appear.

- Reputation matters, and the reputation of the company is based on far more than just its financial performance and the quality of its products and services.

- The employee experience matters deeply. Talent is not prepared to sit and wait for the golden opportunity of 20 years hence; they want it now.

- Values matter too - everything from ethics and corporate governance to environmental policy and social responsibility. The reason it matters so much is that the leaders of the future have a clear understanding of the link between reputation and financial performance.

In this war for talent there are some very clear winners and losers. There are sectors which are getting their message across and there are those which are frankly failing to build positive reputations.

Also, whilst the emerging markets of the world may have got their economic pitch right, they are, in many cases, failing to communicate effectively with the very talent that can help those markets move to the next level. Publicly traded companies seem attractive to almost all but the same cannot be said of companies which are family owned or, indeed, owned by governments.

Companies are not just reputation victims. There is much that can be done to enhance and improve the reputation of companies and of sectors. In winning the war for talent, our research shows that effective internal and external communications combined with good substance to communicate can make a fundamental difference.

There has been much talk in recent months about whether an economic correction could see a lessening of this war for talent. Those who believe that economics alone will change the current intensity of this fight are, I fear, misguided. The reality is that the best talent, like the most attractive real estate, will always be in scarce supply and the future winners in the corporate world will be the ones who are the quickest to recognize this.

Paul Taaffe
Chairman & Chief Executive, Hill & Knowlton

REPUTATION & THE WAR FOR TALENT

THE KEY TAKE AWAYS

To understand the role of reputation in the global War for Talent, Hill & Knowlton commissioned Penn, Schoen & Berland to conduct a survey of more than 500 students from some of the World's leading business schools. Students were surveyed from MBA programs in the US, at Columbia Business School, Harvard Business School, New York University: Stern and MIT: Sloan; in Europe, at London Business School, IESE Business School, HEC Paris, University of Oxford: Saïd, SDA Bocconi and TIAS; and in Asia, at Chinese University of Hong Kong and Tsinghua University.

- MBA students most closely examine the value of a potential employer in terms of its internal workplace policies, specifically the attention, remuneration and environment it provides for its employees. The quality of management and employee talent weighs heavily in their assessment of a firm's reputation.
- The next most important component for these students is a company's reputation as an industry performer, including the quality of products and services, financial performance and growth potential, and innovative practices.
- While many MBA students think that strong corporate governance and ethical standards are important, they are generally less likely to consider what is traditionally known as social responsibility, such as community involvement and environmental policies, as important as other factors in their choice of employer. In fact, when asked about

a series of items important to a company's social responsibility, the top factor is that a company "treats its employees well", though this is then followed by a company that promotes environmental policies.

- A company's reputation as a generous employer and provider of career growth opportunities are the top factors that students look for when considering their own career options. Among US-schooled students, an emphasis is also placed on a company's current reputation among its own employees and their current satisfaction.
- MBA students are most likely to cite opportunities for career advancement, remuneration and benefits, and challenging work as key factors when looking for work after graduation. They also emphasize the importance of maintaining a work-life balance, fitting in with corporate culture and a good brand reputation.

– The most popular jobs are in the financial services and consulting sectors. The industries that elicit the most negative perceptions are alcohol, chemical and tobacco – making them less popular fields. Oil & gas and the pharmaceutical industry also have a net negative perception.

– The ownership structure of a company affects career choice. MBA students are far more attracted to the prospect of working for either listed companies or those owned by VC/PE firms than working for family or government-owned companies.

– Western Europe and North America are the most desired job destinations; companies in these regions are also seen as doing the best job in promoting their reputations. Overall, students from American schools prefer to work in the U.S or Western Europe, though some are interested in working further abroad.

– MBAs from European schools are most inclined to stay in Western Europe for work. But MBA students of European nationality (studying abroad or in Europe) also exhibit the strongest interest in working in other regions and countries and are somewhat more likely than other nationalities to consider working in the Middle East or Eastern Europe.

– The majority of MBAs in Asia are interested in working in Western Europe and North America, but seven out of ten Asian-based students from our study are also interested in working in North Asia, to stay close to home.

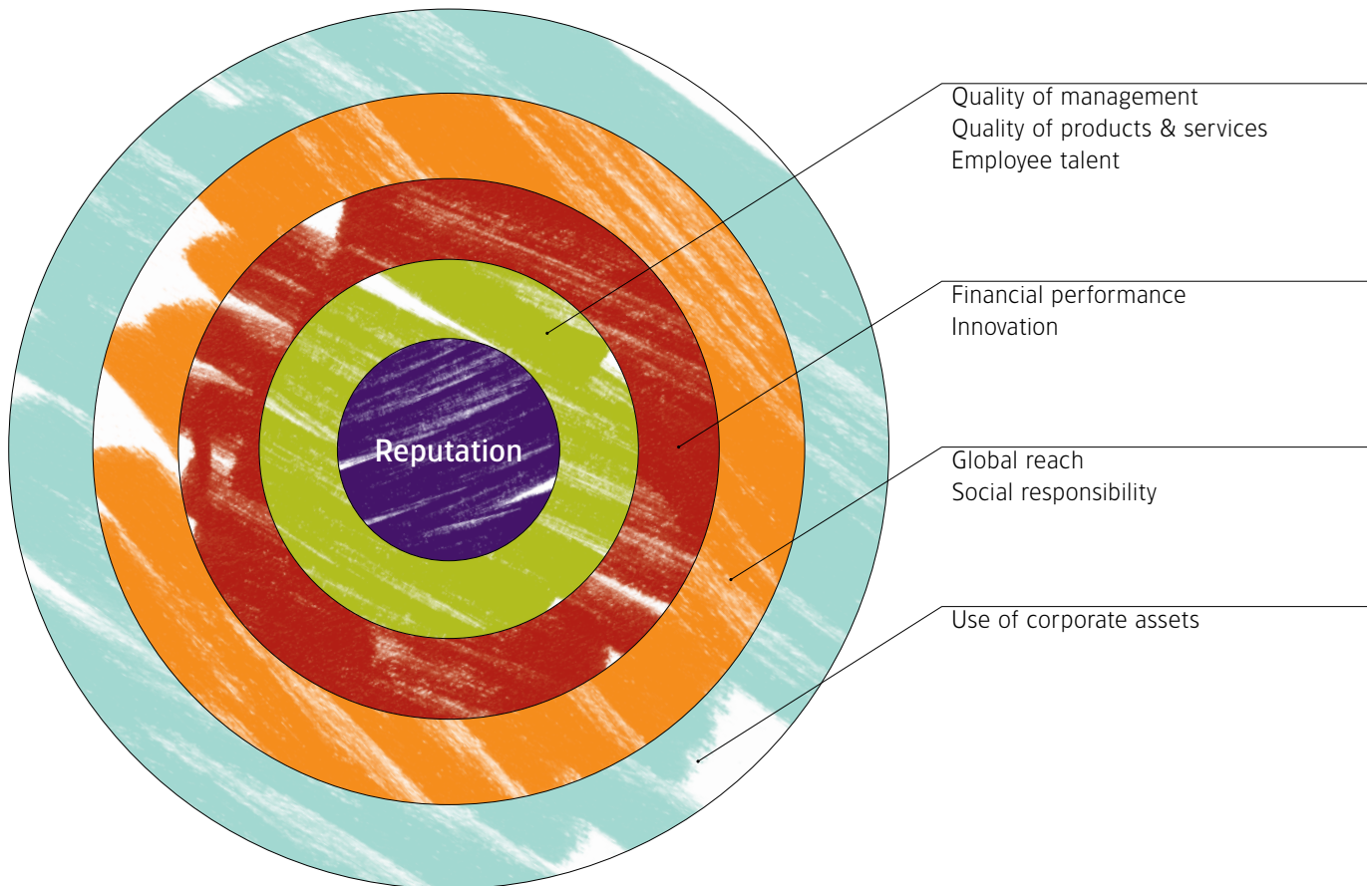
– The CEO of a company is seen as the most influential executive on a company's reputation; MBAs say that an effective CEO is strong on strategy and leadership and should focus on long-term growth and managing talent.

– A majority of MBA students are at least somewhat interested in becoming CEOs themselves. In line with their career priorities, they see the greatest drawback to a CEO position as challenges in work-life balance.

– Across the board, MBA students believe that a company that fails to look after its reputation will also ultimately suffer financially too. Asian-based students are somewhat more likely to feel more strongly about this than students based in other regions.

REPUTATION

MATTERS



In the war for talent, reputation matters. In fact, three out of four MBA students say that corporate reputation plays an extremely or very important role when considering where to work after completing their MBA, while one in five students say it is fairly important. In fact, only 4% of the sample said that reputation was not an important factor (Chart 1).

Whilst MBA students take into account all aspects of a company's performance when assessing reputation, as shown in Chart 2, there are some factors that enjoy much greater prominence. 89% cite quality of management as extremely or very important; 88% quality of products and services and 83% employee talent. Financial performance of the company is considered extremely or very important by 71% and 68% view innovation in the same light. Social responsibility gets a score of 58%, so, whilst it is not the dominant factor, it is nonetheless important to a large section of the talent pool. Some interesting regional variations occur: North American students are relatively more focused than other

nationalities on company performance on innovation (77% compared to 68% overall) and Asian students are relatively less concerned about employee talent (75% versus 83% overall).

Whilst the priority reputation plays in career choice and the components which make up that reputation may vary, very few disagree that a failure to look after reputation will result in a worsened financial performance. In fact, as shown in Chart 4, 96% agreed with the statement that "a company that fails to look after reputational aspects of performance will ultimately suffer financially too". This belief that reputation impacts on financial performance, and ultimately value, concurs with the views of financial analysts who, as surveyed in Corporate Reputation Watch 2006, took a very similar view.

TALENT ON THE MOVE

Talent is becoming increasingly mobile. It is now more commonplace for people to change both industry sectors and country of location a number of times during a career. This is most obvious by looking at the leadership of Fortune-500 and FTSE-100 companies. What is true at the top is increasingly true further down the talent pool and with the leadership of tomorrow. Chart 6 shows clearly that over three quarters of those surveyed say that they are looking to change either industries or firms following graduation. Just under 20% said that they are intending to return to the firm that they worked for prior to their MBA – indeed many of those may have been students who secured a sponsorship from those firms to undertake that MBA in the first place.

What Matters Most?

When considering future careers a number of factors come into play for our sample. They were asked to take a point of view on the relative importance of ten possible attributes when considering employment future. As Chart 5 shows, a clear tiering emerges. The top tier is all about people and the position: employment career opportunities; corporate culture and working environment; employee remuneration and benefits package; and employee satisfaction. These all enjoy scores of 84% or above given by students saying that they are extremely or very important. In the second tier come some of the basic issues about performance: 75% cite the quality of a company's products and services as extremely or very important, and 73% say the firm's financial performance and growth potential fall into this category. The third tier covers the messages that the company communicates about its ethics and social and environmental responsibility – its broader brand and values agenda. In this there are factors such as: strong corporate governance and ethics; social responsibility and community involvement; brand and marketing message; and environmental policy. It is perhaps not surprising that this more external values-driven tier matters less than the basics of the employment reality; after all many MBAs will have borrowed heavily to finance their studies and so economic

concerns will be at the fore. Nonetheless it would be foolhardy to ignore the fact that very large sections of the talent pool place quite high emphasis on areas that previously would have been considered non-core to a business' operation. This survey shows very clearly that what was once a niche concern has very much moved into the mainstream.

The Sectoral Dilemma

With over 50% of our talent pool saying that they are looking to change industry sector upon completion of their MBA, attitudes to industry sectors matter greatly. Here, as shown in Chart 7, a very different picture emerges for different industry sectors. The four industries with the most attractive reputations are banking and finance, information technology, automotive and energy utilities, which have respective net positive interest scores (the number of people interested minus the number of people not interested) of 36%, 11%, 6% and 6%. For the other industry sectors surveyed the results are rather less good news. Perhaps unsurprisingly, the tobacco industry has a net negative score of -54%. However, other sectors that have a net negative score are as follows: chemicals -29%, alcohol -31%, pharmaceutical -8% and oil and gas -7%. Food and beverages has a marginal net positive score of +2%.

Public or Private

The type of company ownership matters too, as shown in Chart 8. By far the most attractive companies for MBA graduates are those which are publicly traded with 61% citing interest and only 6% saying that they are not interested. So whilst the compliance pressures of a raft of corporate governance measures are causing concern in many boardrooms, that has not yet filtered down to the MBA talent pool as a barrier to entry. Having said that, MBA students do say that were they to become a CEO or CFO, one of their causes of concern would be corporate governance related compliance.

Companies which are owned by venture capital or private equity funds have just over half of MBA students (52%) expressing an interest in working for them, versus 12% with a lack of interest. The situation for family companies and government-owned companies is less positive, both having more students not interested than those interested. For family-owned companies, 24% express an interest while 32% say they aren't interested and for government-owned companies, 23% express an interest while nearly half (46%) say that they aren't interested. Here some interesting regional variations apply. Students at Asian business schools are much more attracted by government-owned companies than in any other region.

In fact, 42% say they are interested in working for such a company, compared to 20% who are not.

Overcoming the Reputation Penalty

The poor reputation of industries may put students off an industry sector altogether, but where it doesn't, students are clear about what those companies need to do to attract them. Chart 9 shows that the top three factors which would encourage a student to consider an opening at a company in a sector with a poor reputation are greater career opportunities (68%), more money or financial benefits (67%) or greater opportunities for learning and development (53%). The students do recognize that reputations can be improved, although there is an implicit recognition that it takes some time to do so – and probably outside a 2-year MBA cycle. Thus, 38% of students cite a firm's commitment to improve its own reputation as being something that would lead to taking a more positive attitude towards an opening.

Going Global

In addition to looking to change firms or sectors, a significant number are looking to change the country in which they work. Chart 10 shows that in looking for their new career 20% of students want to move to another country from the one they studied in. A further 25%

are studying outside their home country and plan to remain there post-MBA. Here regional variations apply. European students are somewhat keener to move to another country outside where they studied, with 28% of students supporting this option, than North Americans (15%) and Asians (10%).

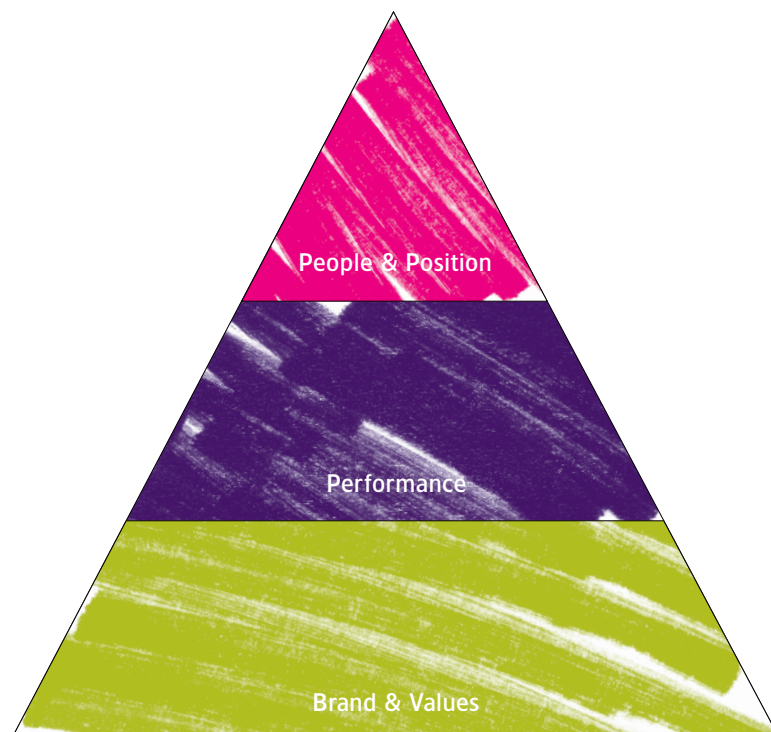
Many have argued that the geographic balance of the world economy and the world's financial markets is decisively shifting from West to East and from North to South. However, as far as our talent pool was concerned, reputation perceptions are not moving in the same way. It remains the case that students believe that Western European and North Americans firms promote their corporate reputation much better than those in the rest of the world – see Chart 11. For emerging market companies from Eastern Europe, Latin America and the Middle East, there is a huge knowledge vacuum, with 47%, 54% and 56% not knowing enough about companies from these regions to take a view as to how those companies promoted their corporate reputation. This lack of knowledge translates fairly directly into views on possible regional locations.

Chart 12 shows that, when comparing the number of students interested minus the number of students not interested in various job locations, Western Europe has

a net positive score of +80% and North America of +76%. Other regions with net positive scores are North Asia +30%, Australia and New Zealand +23% and South East Asia +1%. However, some regions have net negative scores: Latin America -8%, South Asia -19%, Middle East -37%, Russia -41%, Eastern Europe (not including Russia) -36% and Africa -49%. Perhaps unsurprisingly and as Chart 13 shows, there are some regional variations. European students are somewhat more interested than others in working in the Middle East and Eastern Europe; and Asian students that we surveyed are more interested in working in North and South East Asia, which reflects the China opportunity combined with their predominantly Chinese heritage.

A great deal has been made of the rise of the BRIC economies and other emerging markets, such as the N11. To test the relative performance of some of these, we looked at their appeal as career locations to our talent pool (see Chart 14). In this battle for preference, it is clear that China, Singapore and Brazil are the winners amongst these emerging markets. Among students from the US and European programs, China, Singapore and Brazil ranked similarly, though among the students from Hong Kong and China, Brazil fared less well, as did India. Students at European schools are somewhat more attracted by the UAE than

students at US or Asian schools. Overall, 64% of those surveyed are very or fairly interested in China and 61% are very or fairly interested in Singapore. Brazil follows with a score of 48%, India 40%, the United Arab Emirates 39% and Russia 23%.



RESPONSIBLE GENERATION

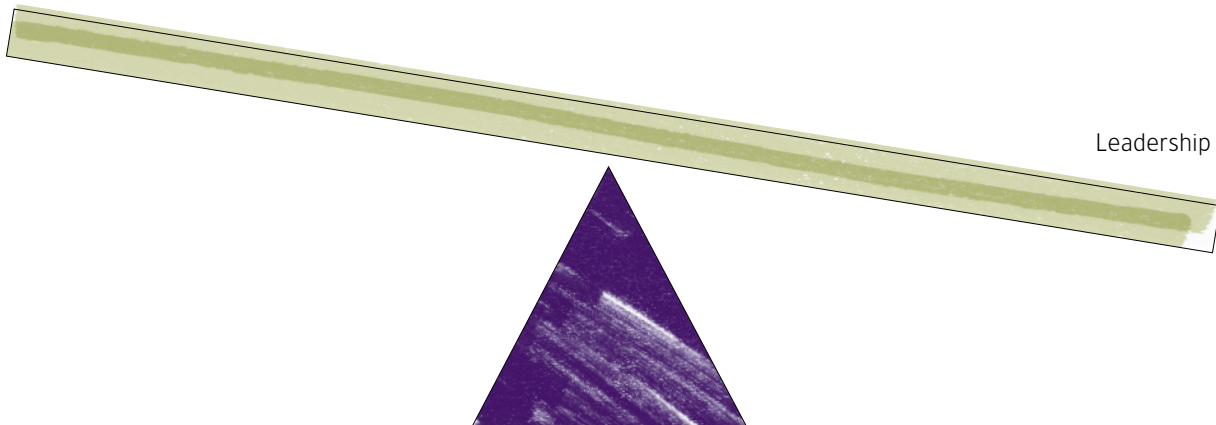
It has already been established that social responsibility is a factor in career choice, albeit not the dominant one, but we wanted to understand further what in the CSR arena motivated talent and how they judge the CSR performance of companies.

When assessing the corporate social responsibility of a company (Chart 15), two clear dominant factors emerge; how they treat their employees (78%); and how they meet their environmental responsibilities (68%). The third factor, at 57%, is supporting good causes in society. Once again, there are interesting regional variations. Europeans are somewhat less interested than other nationalities in what companies do to support good causes in society. North Americans are relatively more concerned as to what extent the company supports local communities – this comparison suggests different perspectives on the role of the State versus business responsibility in these two respective continents. Nearly half of students at Asian schools place importance on the extent to which companies advertise responsibly – this may be a recognition of the fact that the advertising industry in this region is much less heavily regulated than it is within the US or Europe and therefore companies enjoy greater freedom to advertise ‘irresponsibly’ in Asia.

But can poor performance on CSR lead to the rejection of a job offer? And if so, what elements of CSR might matter? Chart 17 provides some answers. It shows what aspects of a company's broader performance in society would lead a student to turn down a job offer and four key components emerge: not treating its employees well (87%); charging unfair prices or treating customers unfairly (43%); letting down shareholders through poor corporate governance (41%) and having an irresponsible approach to advertising (40%). Once again, we pick up some regional variations: European MBA students seem generally less likely than other nationalities to turn down a job offer because of poor corporate governance, irresponsible advertising and not supporting good causes in society. North Americans are more likely than other nationalities to say they would reject a job offer if a company does not have a “useful role in society” (44%), or does not support local communities (27%).

GENERATION 2025

Strategy Development
Financials



The talent pool we surveyed are likely to include people who will be corporate leaders in the next 15–20 years. So what does generation 2025 want? Firstly, they do want to get to the top; 84% were very or fairly interested in becoming a CEO or CFO one day. This was common across schools and across regions. See Chart 19.

But how well does their education at Business School prepare them for this leadership task ahead?

The answer is mostly well, save in one important area. Chart 20 compares the factors in which the students believe their MBA prepares them well, compared to the key areas in which a CEO needs to be successful in. The feeling among MBAs is that they are well prepared in strategy development as well as financial skills. However they do not believe that their MBA provides as much emphasis on the leadership and motivational skills as they will need when in the room at the top.

CHARTS

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Chart 1

Of the firms you are considering working for after your MBA, how important are their corporate reputations in your decision to target these firms?

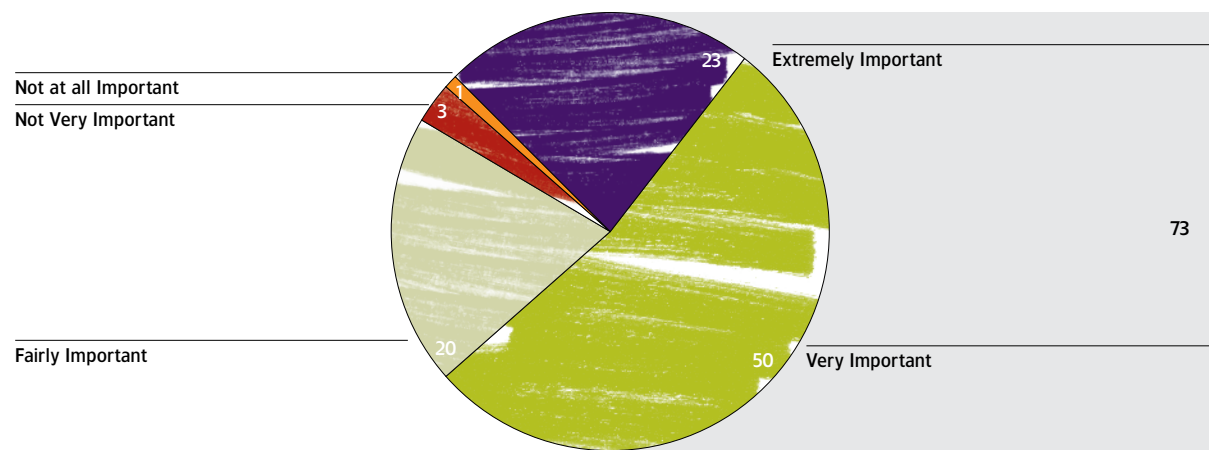


Chart 2

Below is a list of commonly used attributes for assessing a firm's reputation. Based on what you have heard or read, how important do you believe each of the following to be in assessing the reputation of a company?

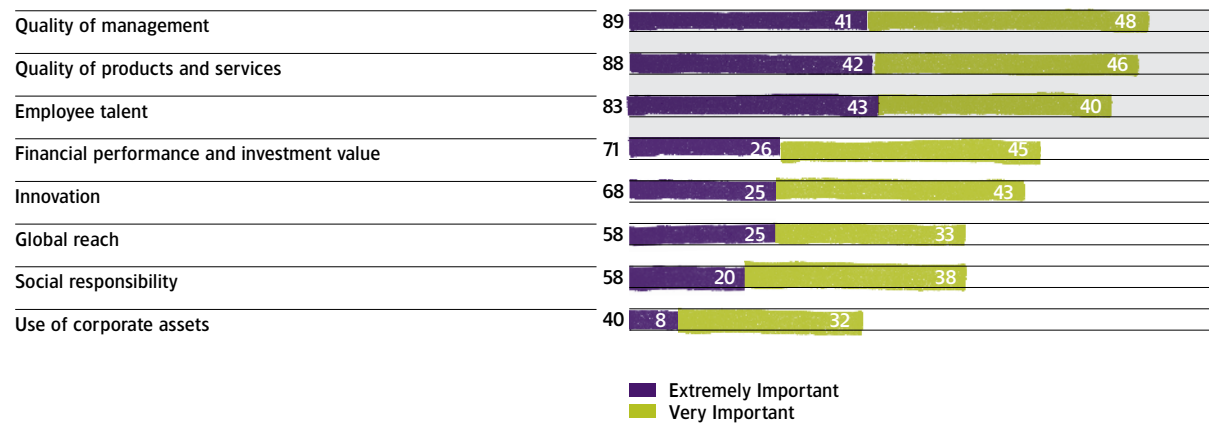


Chart 3

Below is a list of commonly used attributes for assessing a firm's reputation. Based on what you have heard or read, how important do you believe each of the following to be in assessing the reputation of a company?

Showing those saying Extremely / Very Important	Overall	North Americans	Europeans	Asians
Quality of management	89	91	91	83
Quality of products and services	88	91	85	86
Employee talent	83	89	84	75
Financial performance and investment value	71	75	64	70
Innovation	68	77	63	65
Global reach	58	55	57	60
Social responsibility	58	57	54	61
Use of corporate assets	40	36	36	45

Chart 4

Thinking about all the various factors we have discussed so far, both financial and non-financial, how much would you agree or disagree with the following statement?

“A company that fails to look after reputational aspects of performance will ultimately suffer financially too.”

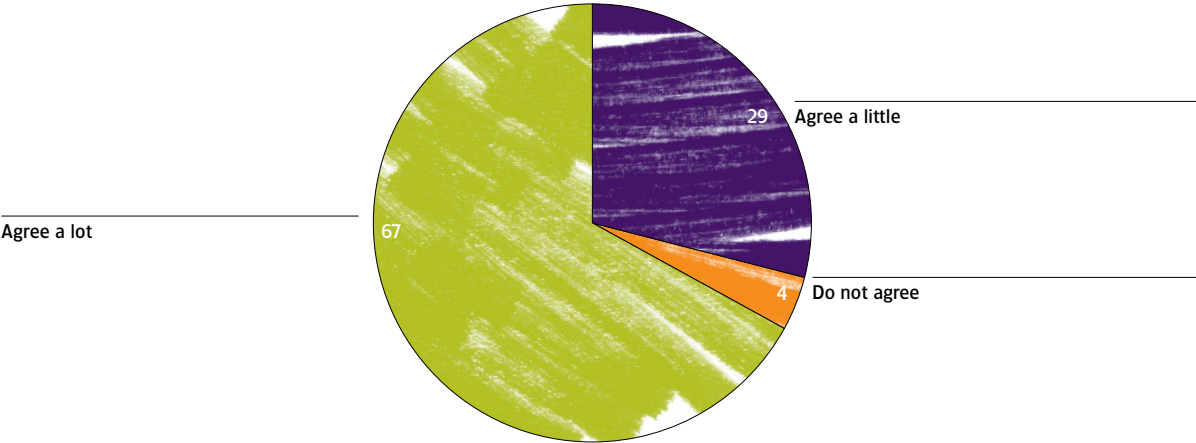


Chart 5

How important are the following factors when considering where to work after your MBA?

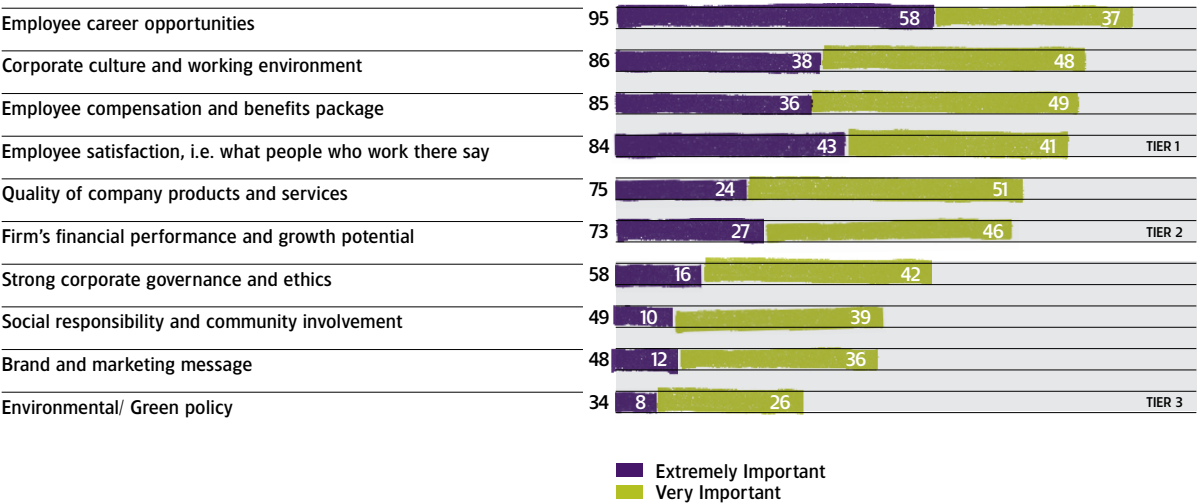


Chart 6

What are you planning to do upon completing your MBA?

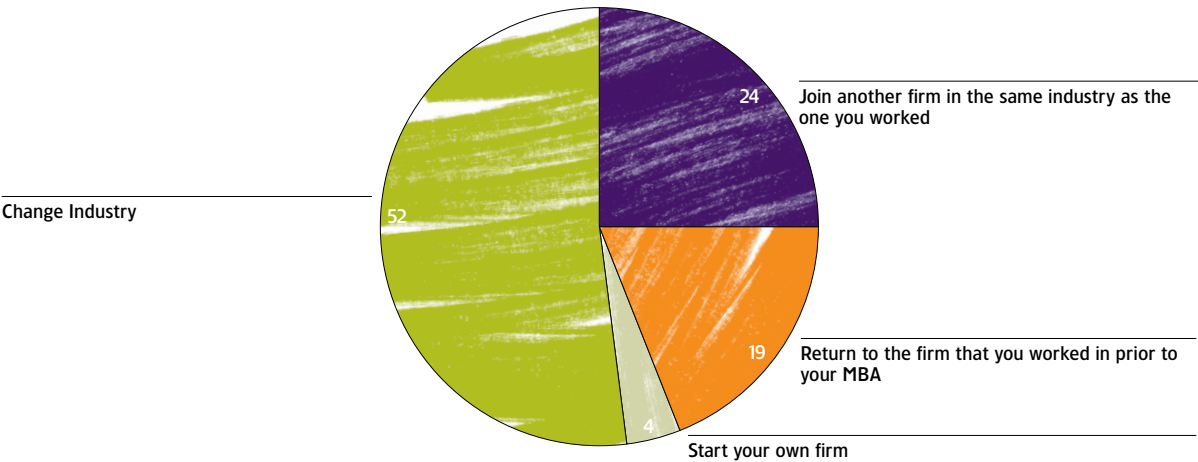
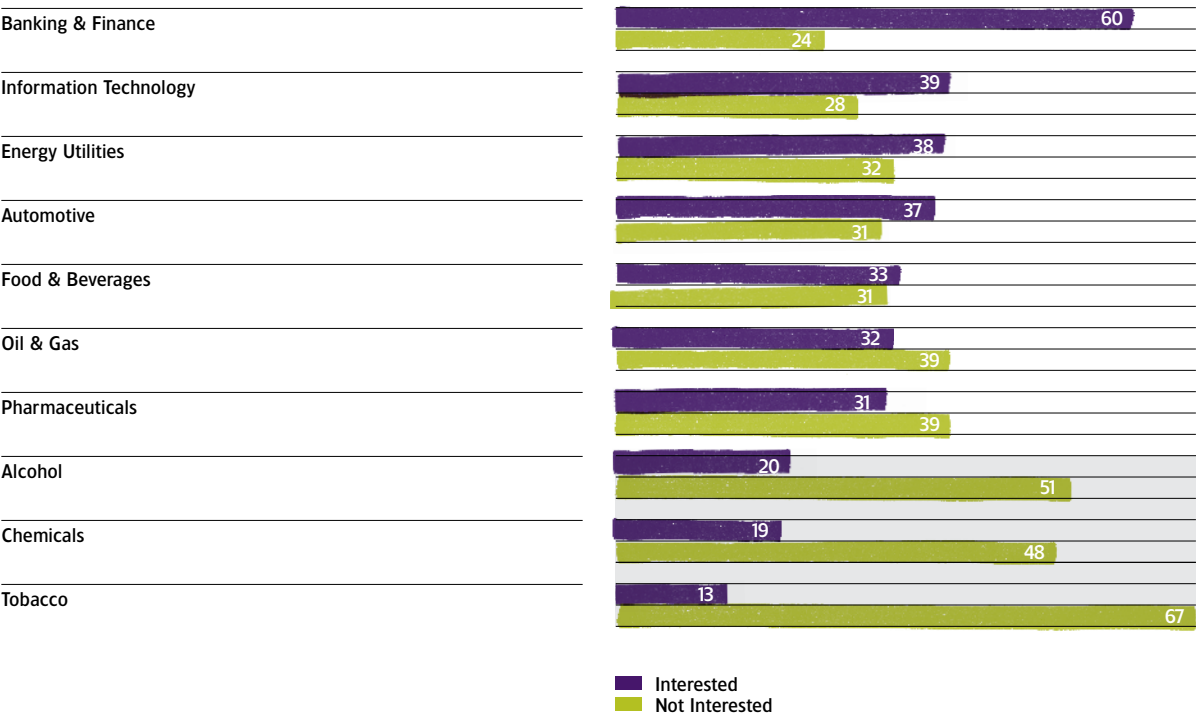


Chart 7

Based on what you have heard or read, do the reputations of the following industry sectors make you more or less interested in wanting to work for firms in these sectors?



Showing Very/Fairly Interested, Not Very/Not at all Interested; Those saying “Makes No Difference” can be calculated by subtracting %Interested + Not Interested from 100%

Chart 8

Based on what you have heard or read, do the reputations of any of the following types of companies/organizations make you more or less interested in wanting to work for them?



Showing Very/Fairly Interested, Not Very/Not at all Interested Those saying “Makes No Difference” can be calculated by subtracting %Interested + Not Interested from 100%

Chart 9

If an industry sector has a poor reputation, what could a firm in that sector offer you to compensate for the sector's poor reputation, and/or what could attract you to work for that firm?



Chart 10

Which of the following best describes your intentions of where you would like to work following the completion of your MBA?

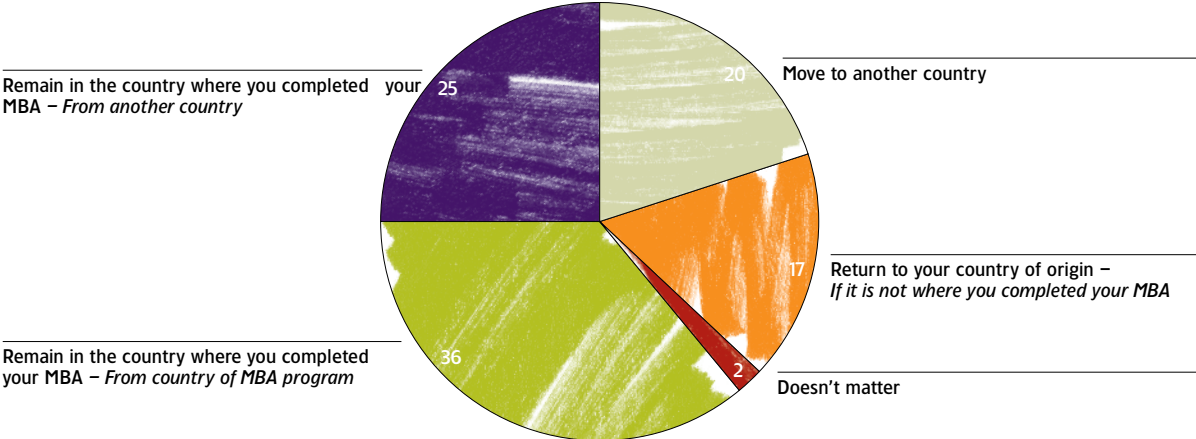


Chart 11

Which of the following best describes your views on whether companies based in each of the following regions of the world do a good job in promoting and protecting their corporate reputations?

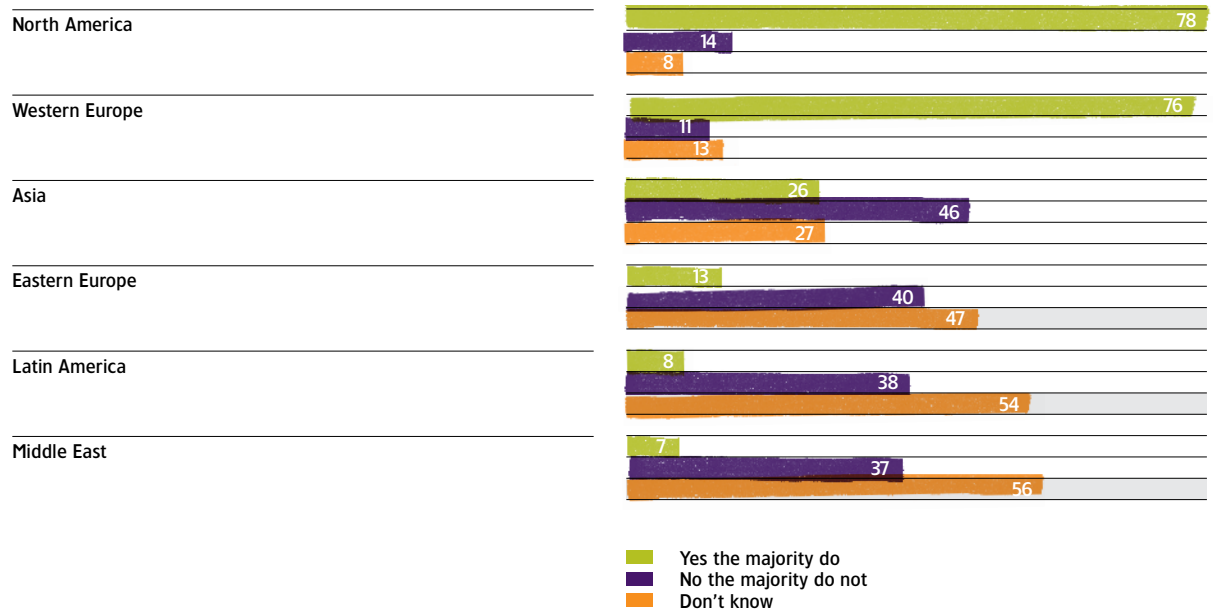
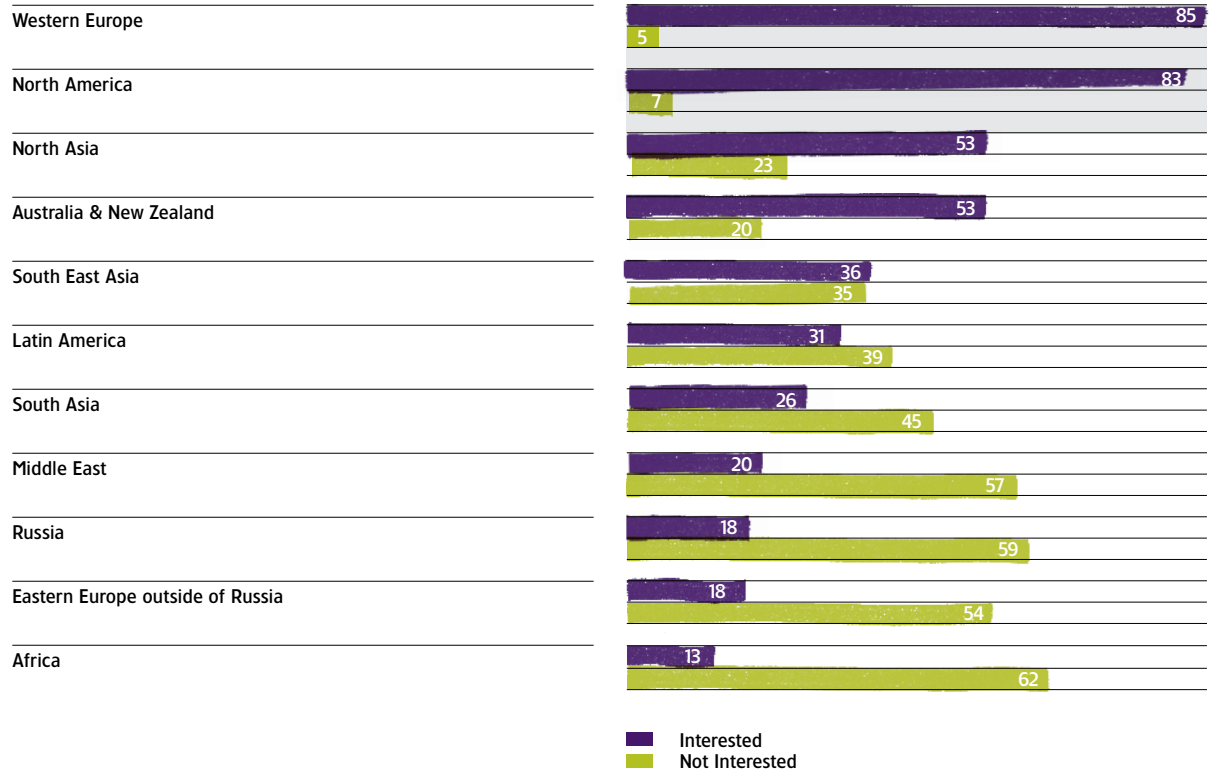


Chart 12

Based on what you have heard or read, do the reputations of the following regions/countries make you more or less interested in wanting to work for firms based in these geographies?



Showing Very/Fairly Interested, Not Very/Not at all Interested Those saying "Makes No Difference" can be calculated by subtracting %Interested + Not Interested from 100%

Chart 13

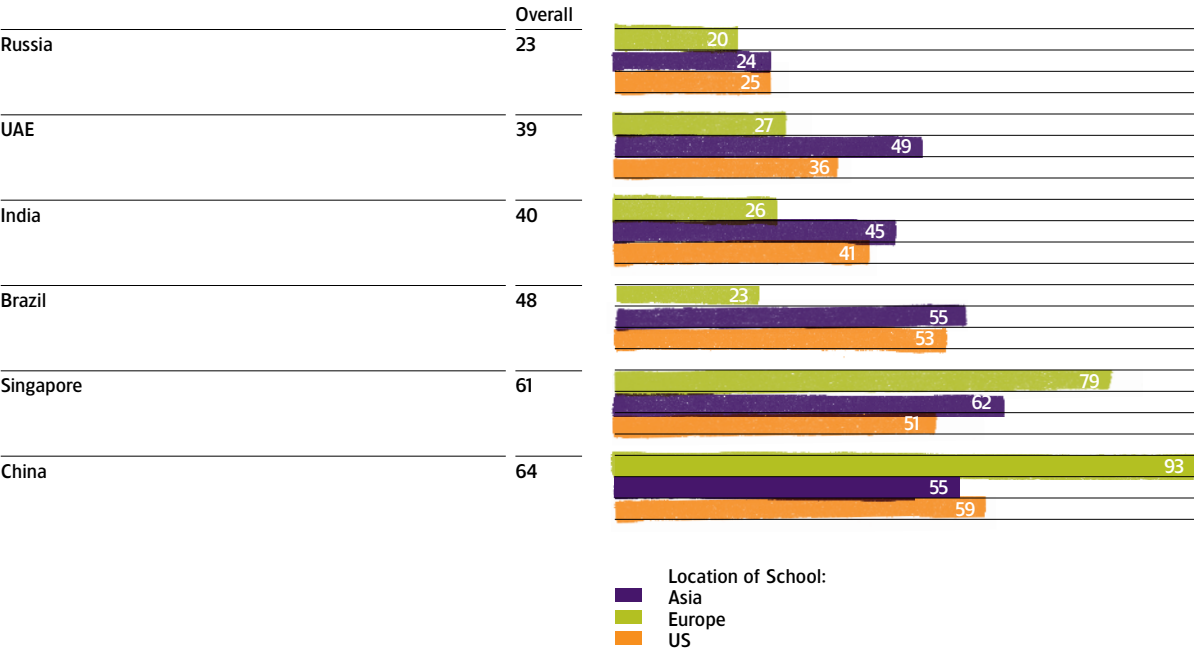
Based on what you have heard or read, do the reputations of the following regions/countries make you more or less interested in wanting to work for firms based in these geographies?

Showing those saying Interested v. Not Interested	Overall	North Americans	Europeans	Asians
Western Europe	85/5	81/6	92/1	82/6
North America	83/7	86/3	72/15	86/6
North Asia	53/23	51/20	33/35	69/10
Australia & New Zealand	53/20	56/15	54/20	54/18
South East Asia	36/35	28/40	31/44	49/21
Latin America	31/39	33/31	36/37	22/51
South Asia	26/45	26/38	25/48	28/45
Middle East	20/57	15/57	32/46	16/60
Russia	18/59	19/59	20/62	20/54
Eastern Europe outside of Russia	18/54	16/53	27/48	14/54
Africa	13/62	13/58	15/63	10/62

Showing Very/Fairly Interested, Not Very/Not at all Interested Those saying “Makes No Difference” can be calculated by subtracting %Interested + Not Interested from 100%

Chart 14

Based on what you have heard or read about the emerging global economy lately, how interested are you in working in the following countries in the next five years?



Showing Very/Fairly Interested

Chart 15

Which of the following are very important in your assessment of the corporate social responsibility of a company?

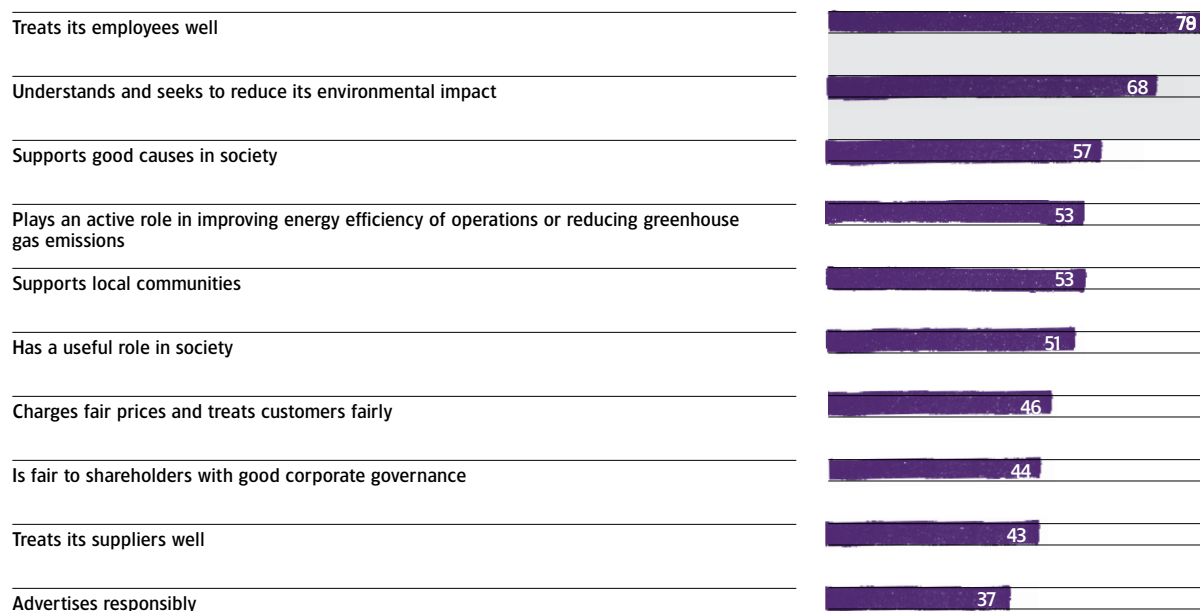


Chart 16

Which of the following are very important in your assessment of the corporate social responsibility of a company?

	Overall	North Americans	Europeans	Asians
Treats its employees well	78	78	76	79
Understands and seeks to reduce its environmental impact	68	71	70	67
Supports good causes in society	57	65	43	64
Plays an active role in improving energy efficiency of operations or reducing greenhouse gas emissions	53	55	50	55
Supports local communities	53	68	43	52
Has a useful role in society	51	53	49	55
Charges fair prices and treats customers fairly	46	51	38	51
Is fair to shareholders with good corporate governance	44	49	36	48
Treats its suppliers well	43	42	46	43
Advertises responsibly	37	38	27	46

Chart 17

And which of the following attributes would drive you to turn down an attractive job offer from a company?

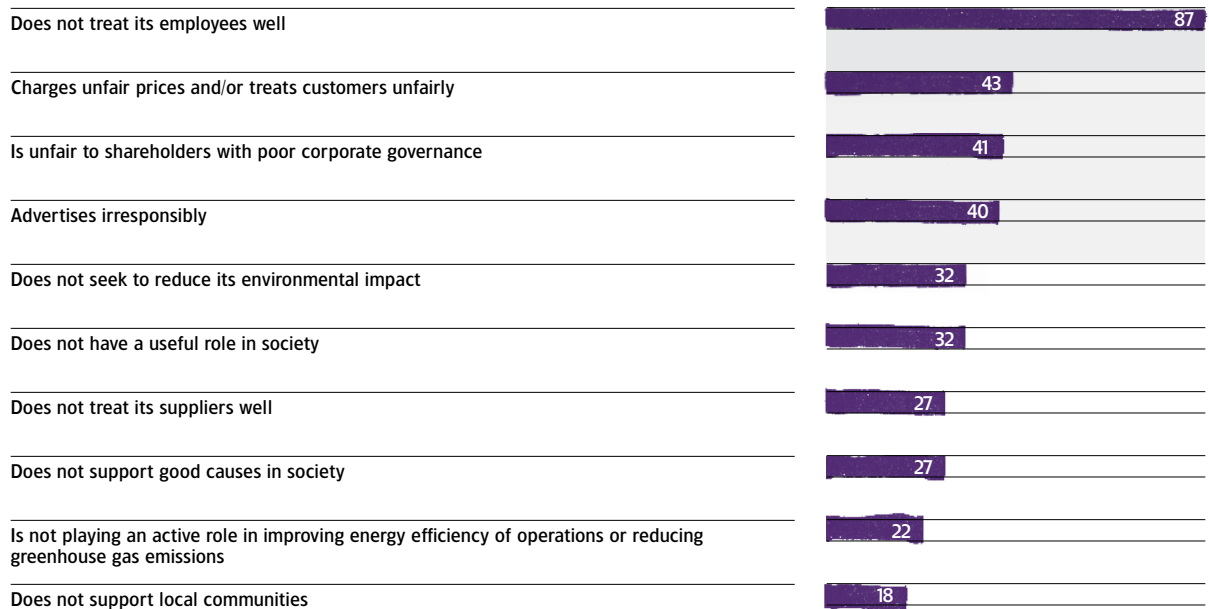


Chart 18

And which of the following attributes would drive you to turn down an attractive job offer from a company?

	Overall	North Americans	Europeans	Asians
Does not treat its employees well	87	88	90	83
Charges unfair prices and/or treats customers unfairly	43	52	35	45
Is unfair to shareholders with poor corporate governance	41	56	26	46
Advertises irresponsibly	40	46	34	46
Does not seek to reduce its environmental impact	32	25	35	37
Does not have a useful role in society	32	44	26	29
Does not treat its suppliers well	27	32	26	26
Does not support good causes in society	27	36	13	31
Is not playing an active role in improving energy efficiency of operations or reducing greenhouse gas emissions	22	25	15	22
Does not support local communities	18	27	10	15

Chart 19

How interested are you in one day becoming a CEO or CFO?

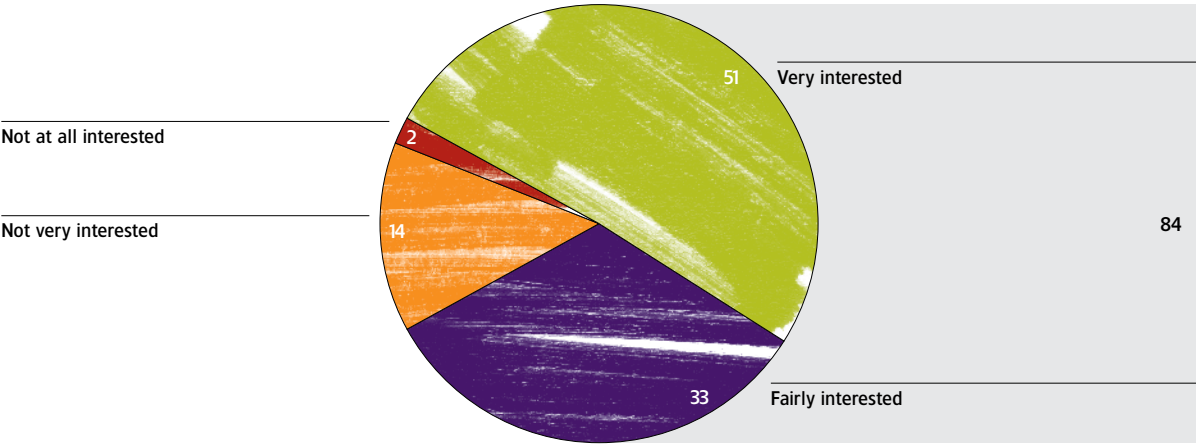
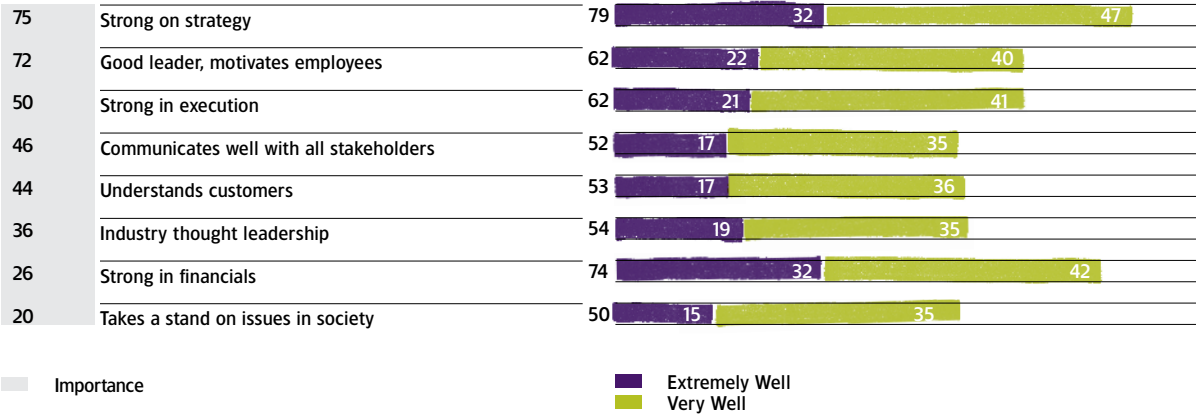


Chart 20

How important or unimportant do you think it is for a CEO to have the following attributes?
How well has your MBA prepared you on each of these measures?



Showing those saying Extremely Important

Showing those saying prepared Extremely Well /Very Well

SURVEY METHODOLOGY

The survey was conducted by Penn, Schoen & Berland Associates for Hill & Knowlton. Interviews were carried out in May and from October to November 2007 with current MBA students at 12 top ranked international business schools in the US, Europe and Asia.

Data has been weighted so that the overall results reflect the balance by region of the world's top business schools.

Continents	Number of Schools	Continent's Weighting
US	4	40%
Europe	6	40%
Asia	2	20%

We are broadly referring to these schools as US schools, European schools and Asian schools.

	Sample Size
United States	200
Columbia Business School	50
Harvard Business School	50
New York University	50
MIT: Sloan	50
Europe	242
London Business School (UK)	37
IESE Business School (Spain)	40
HEC Paris (France)	41
University of Oxford: Saïd (UK)	44
SDA Bocconi (Italy)	40
TIAS (The Netherlands)	40
Asia	85
Chinese University of Hong Kong	40
Tsinghua University (China)	45
Total	527

We also classify students by nationality, regardless of the location of study.

Nationality of Students	Sample Size
North American	115
European	157
Asian	162
Total	434

Students from the following countries took part in the survey.

Algeria	Morocco
Argentina	Netherlands
Australia	Nigeria
Belgium	Norway
Brazil	Paraguay
Bulgaria	Peru
Canada	Philippines
Chile	Poland
China	Portugal
Colombia	Romania
Costa Rica	Russian Federation
Cyprus	Serbia
Denmark	Singapore
Egypt	Slovakia
France	South Africa
Georgia	Spain
Germany	Sweden
Greece	Switzerland
Hong Kong	Thailand
Hungary	Turkey
India	United Kingdom
Indonesia	United States
Ireland	Uruguay
Italy	Venezuela
Jamaica	Vietnam
Japan	
Kenya	
Korea	
Kuwait	
Lao Peoples Democratic Republic	
Lebanon	
Mexico	

CONTACT H&K

Corporations today face ever increasing challenges from sceptical customers, demanding shareholders and greater regulatory scrutiny. The need for accountability, transparency and credibility in communications has never been greater.

Our corporate and financial practice is skilled at crystallizing the key issues, defining the corporate positioning and deploying the right communications channels to reach these multiple stakeholders.

Our work is relevant whenever company value or character is at stake.

How do we make a difference?

By being able to quickly activate a team of the right people who can both advise and implement. People who:

- Know how to read a balance sheet and understand the financial markets
- Can help build the corporate brand and know how to drive brand preference
- Can help manage a crisis from litigation to recalls to alleged fraud
- Understand the importance of human capital and the best methods to engage employees
- Can build a reputation or rebuild a tarnished one

There isn't an industry sector or a location that we don't represent. We get straight to the business issues from the first meeting (it's not about us, it's about you.)

Our services include:

- Corporate reputation benchmarking and measurement
- Corporate positioning and message development
- Business to business marketing
- Change and Internal communication
- Crisis communications, preparation and management
- Corporate social responsibility and strategic philanthropy
- Financial communications and investor relations; and
- Litigation support

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