2018 康耐仕人力资源雇佣调研报告
2018 CONNECTUS EMPLOYMENT REPORT

2018.05.03

CONNECTUS
CONNECTING TALENTS • BUILDING SUCCESS

报告说明
ABOUT THE REPORT

欢迎参阅2018康耐仕人力资源雇佣报告。我们收集的见解来自六大行业的雇主及候选人，为2018年中国人才市场走向提供指南。

Welcome to the 2018 CONNECTUS Employment Report. Compiling inputs from employers and candidates of 6 major industries, this report provides insights to the human capital market trends in China.

报告持续时间：2018.03.12 – 2018.04.12

Survey Duration: 12Mar 2018 – 12Apr 2018

调研行业：汽车行业，工业，互联网行业，医药行业，快消品业，银行金融服务业等

Industries surveyed: Automotive, Industrial, Internet/IT, Healthcare, Consumer, B&F Services

参与调研人数：1204人

No. of participants: 1204

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目 录
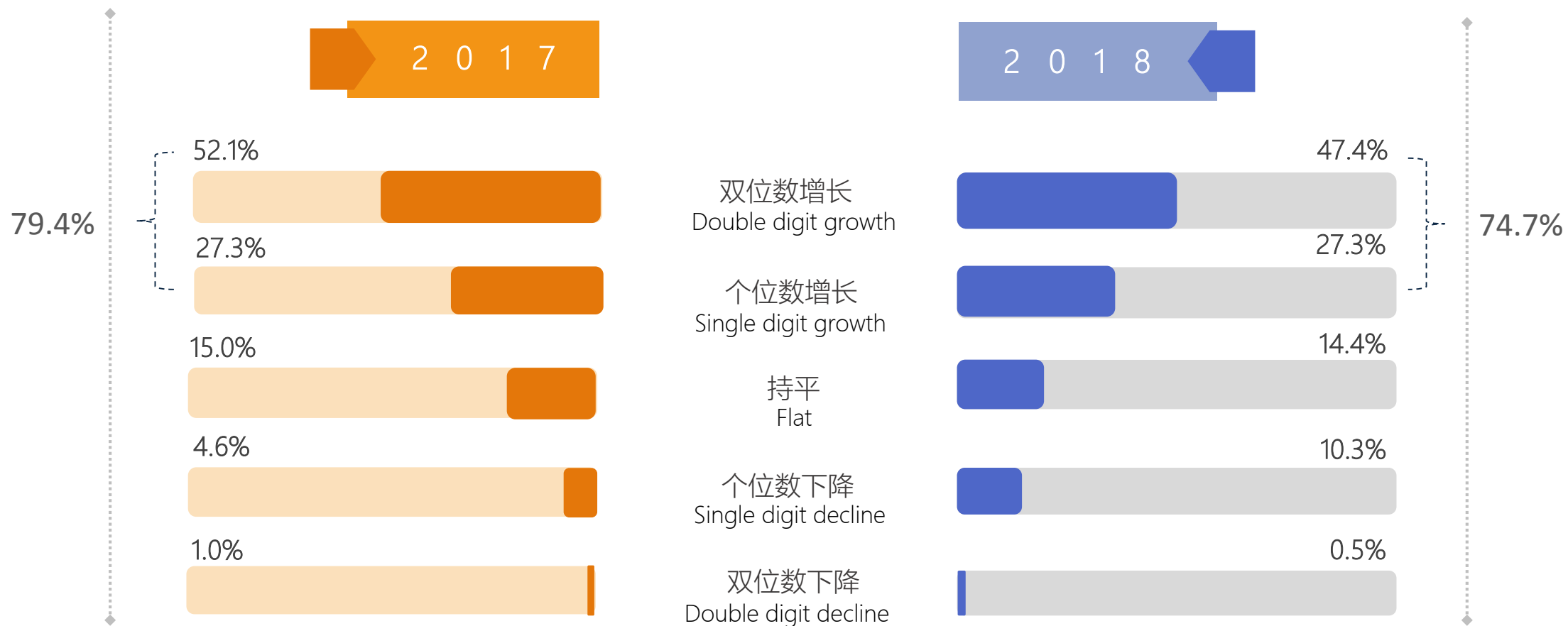## CONTENT

2017 – 2018
中国区市场宏观趋势
MARKET OUTLOOK

PART A

2017 VS 2018，营业额增长比较
2017 VS 2018 REVENUE GROWTH

74.7%的企业认为营业额在2018年将持续增长，2018年保持增长的企业数量较2017年减少了4.7%。
74.7% of companies expect growth to continue in 2018, a decline of 4.7% compared to 2017.

2017

2018

79.4%

74.7%

52.1%	双位数增长 Double digit growth	47.4%
27.3%	个位数增长 Single digit growth	27.3%
15.0%	持平 Flat	14.4%
4.6%	个位数下降 Single digit decline	10.3%
1.0%	双位数下降 Double digit decline	0.5%

六大行业营业额的增长预测
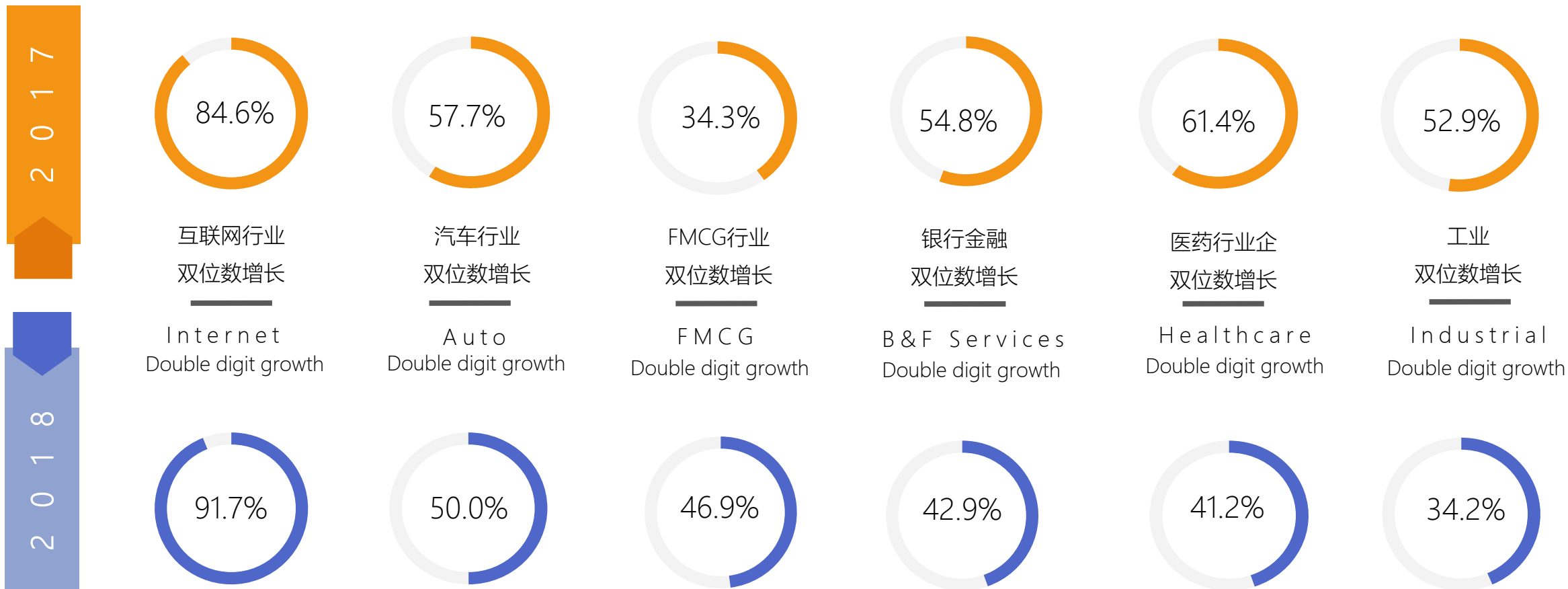## REVENUE GROWTH IN THE 6 SECTORS

互联网和快消品企业表示，相对去年2018年更为乐观。
Internet and FMCG are more optimistic about 2018 than 2017.

医药、汽车、工业和金融业企业，认为2018年营业额有双位数增长的人数，较2017有所下降。
Healthcare, Automotive, Industrial and B&F Services have a lower percentage of people expecting double digit growth in 2018. compared to 2017..

2017

84.6%	57.7%	34.3%	54.8%	61.4%	52.9%
互联网行业 双位数增长	汽车行业 双位数增长	FMCG行业 双位数增长	银行金融 双位数增长	医药行业企 双位数增长	工业 双位数增长
Internet Double digit growth	Auto Double digit growth	FMCG Double digit growth	B&F Services Double digit growth	Healthcare Double digit growth	Industrial Double digit growth

2018

91.7%	50.0%	46.9%	42.9%	41.2%	34.2%

薪资政策
COMPENSATION SCHEME

PART B

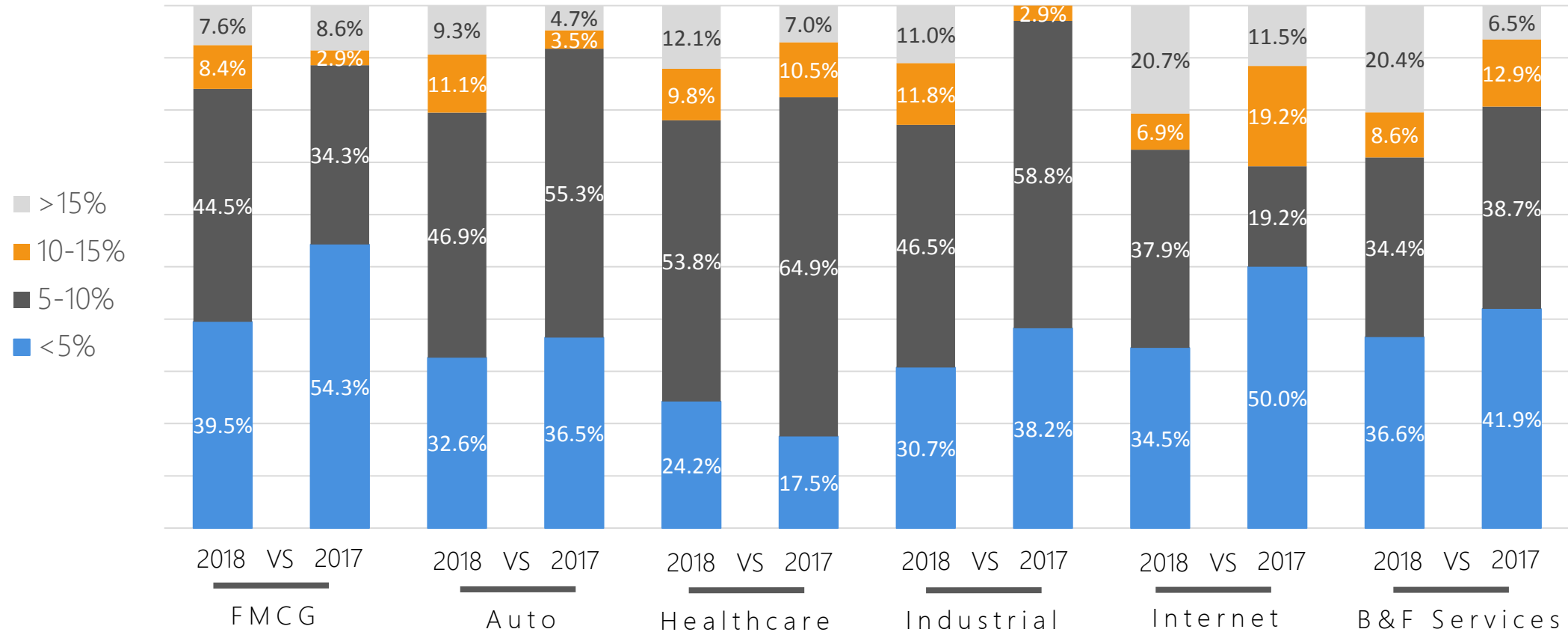2017 VS 2018 年薪普调
2017 VS 2018 MERIT INCREMENTS

除了互联网行业，其他行业在2018年薪普调幅度比2017高。
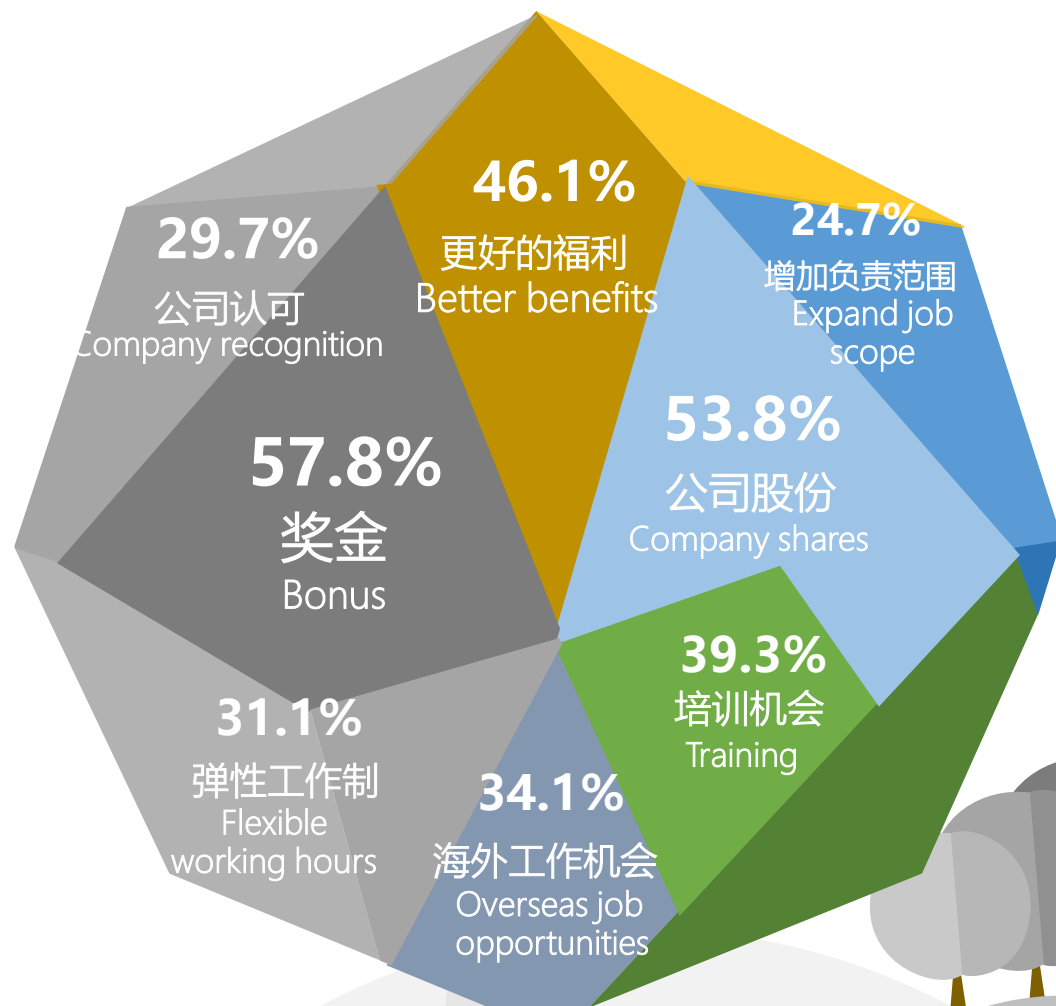Except for the internet sector, all major industries have higher merit increments in 2018 vs 2017.

20%的企业，2018的年薪普调范围超过10%。
20% of companies gave merit increments of >10% in 2018.

>15%
10-15%
5-10%
<5%

	FMCG		Auto		Healthcare		Industrial		Internet		B&F Services	
	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017
>15%	7.6%	8.6%	9.3%	4.7%	12.1%	7.0%	11.0%	2.9%	20.7%	11.5%	20.4%	6.5%
10-15%	8.4%	2.9%	11.1%	3.5%	9.8%	10.5%	11.8%		6.9%	19.2%	8.6%	12.9%
5-10%	44.5%	34.3%	46.9%	55.3%	53.8%	64.9%	46.5%	58.8%	37.9%	19.2%	34.4%	38.7%
<5%	39.5%	54.3%	32.6%	36.5%	24.2%	17.5%	30.7%	38.2%	34.5%	50.0%	36.6%	41.9%

候选人认为以下因素可以代替加薪或晋升
BENEFITS THAT CANDIDATES PREFER IN LIEU OF SALARY INCREMENTS

29.7%
公司认可
Company recognition

46.1%
更好的福利
Better benefits

24.7%
增加负责范围
Expand job scope

57.8%
奖金
Bonus

53.8%
公司股份
Company shares

31.1%
弹性工作制
Flexible working hours

39.3%
培训机会
Training

34.1%
海外工作机会
Overseas job opportunities

过半数的候选人选择奖金和公司股份，作为加薪或晋升的替代。
More than half of candidates feel bonus and stocks can replace salary increments.

培训机会是除了物质代替之外，最高比例的选项。
Training is rated the highest non-monetary item.

员工流动率分析
STAFF TURNOVER

PART C

2016 VS 2017 员工流动率
2016 VS 2017 STAFF TURNOVER

30%的企业离职率在2017年超过20%，同比2016年的20%要多。
30% of companies experience >20% staff turnover in 2017 compared to 20% in 2016.

工业和汽车行业的员工离职率在2017比2016高。
Industrial and Automotive sectors experience higher turnover in 2017 compared to 2016.
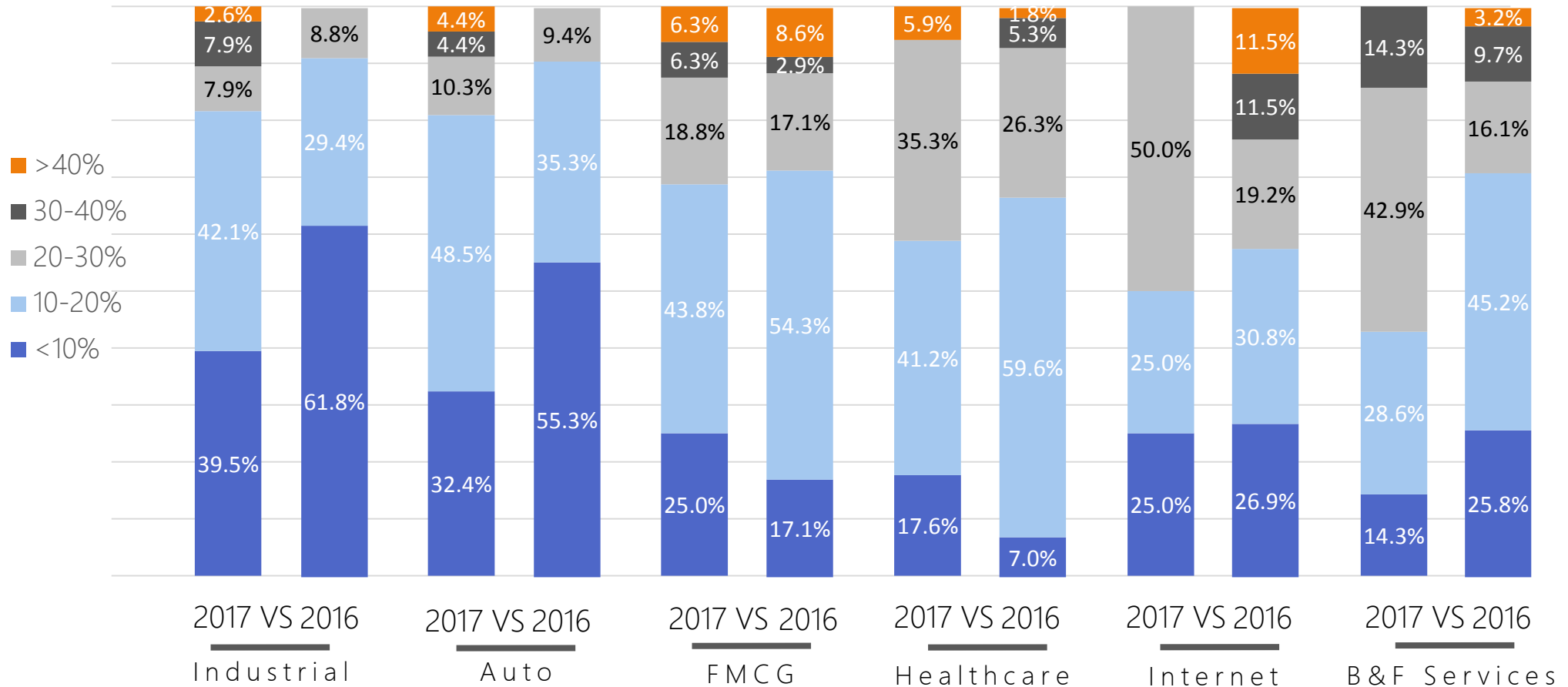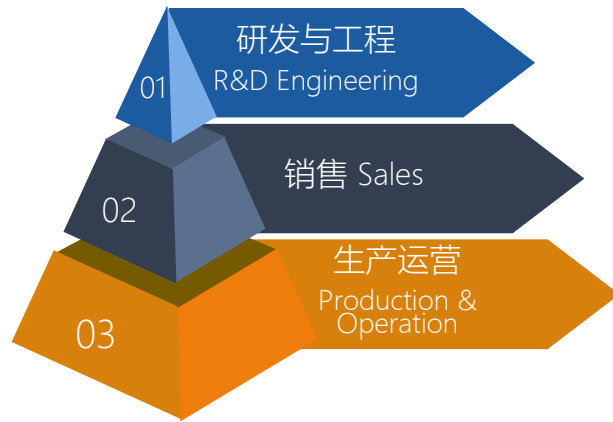
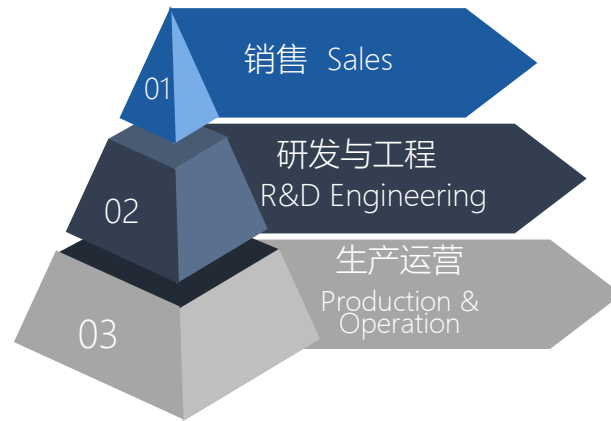# 2017年离职率前三的岗位
2017 FUNCTIONS WITH HIGH TURNOVER

互联网，金融和医药2017前三离职岗位和2016相比变化较大。
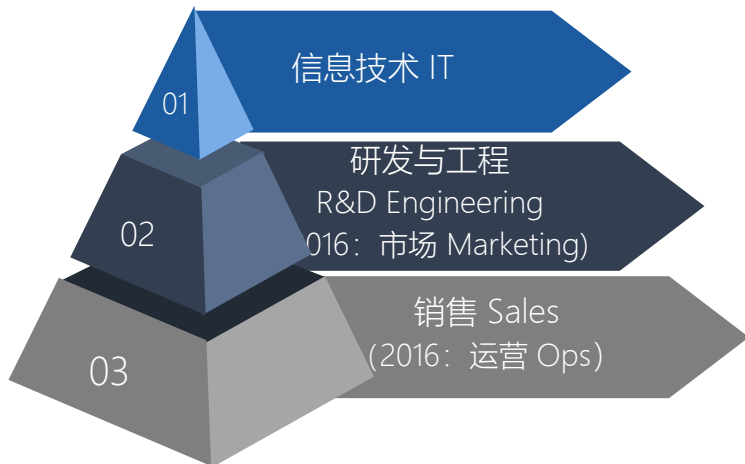Internet, B&F and Healthcare experience high turnover in different positions in 2017 compared to 2016.
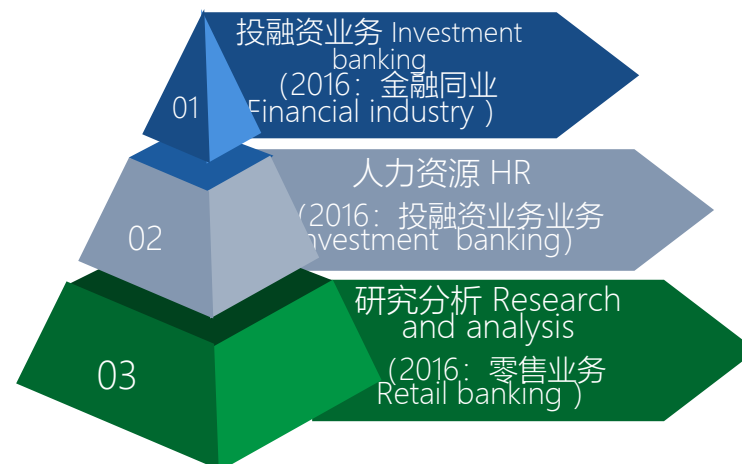
Auto

- 01 研发与工程 R&D Engineering
- 02 销售 Sales
- 03 生产运营 Production & Operation

Industrial

- 01 销售 Sales
- 02 研发与工程 R&D Engineering
- 03 生产运营 Production & Operation

FMCG

- 01 销售 Sales
- 02 市场 Marketing
- 03 供应链与采购 Supply chain

Internet

- 01 信息技术 IT
- 02 研发与工程 R&D Engineering (2016：市场 Marketing)
- 03 销售 Sales (2016：运营 Ops)

B&F Services

- 01 投融资业务 Investment banking (2016：金融同业 Financial industry)
- 02 人力资源 HR (2016：投融资业务业务 Investment banking)
- 03 研究分析 Research and analysis (2016：零售业务 Retail banking)

Healthcare

- 01 临床 Clinical (2016：销售 Sales)
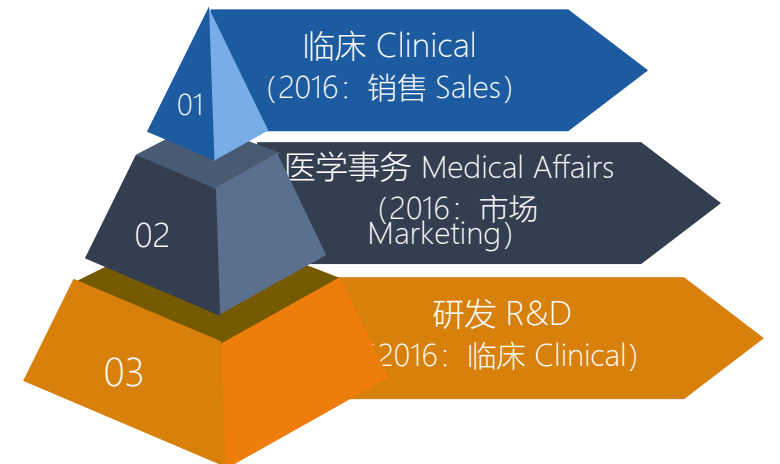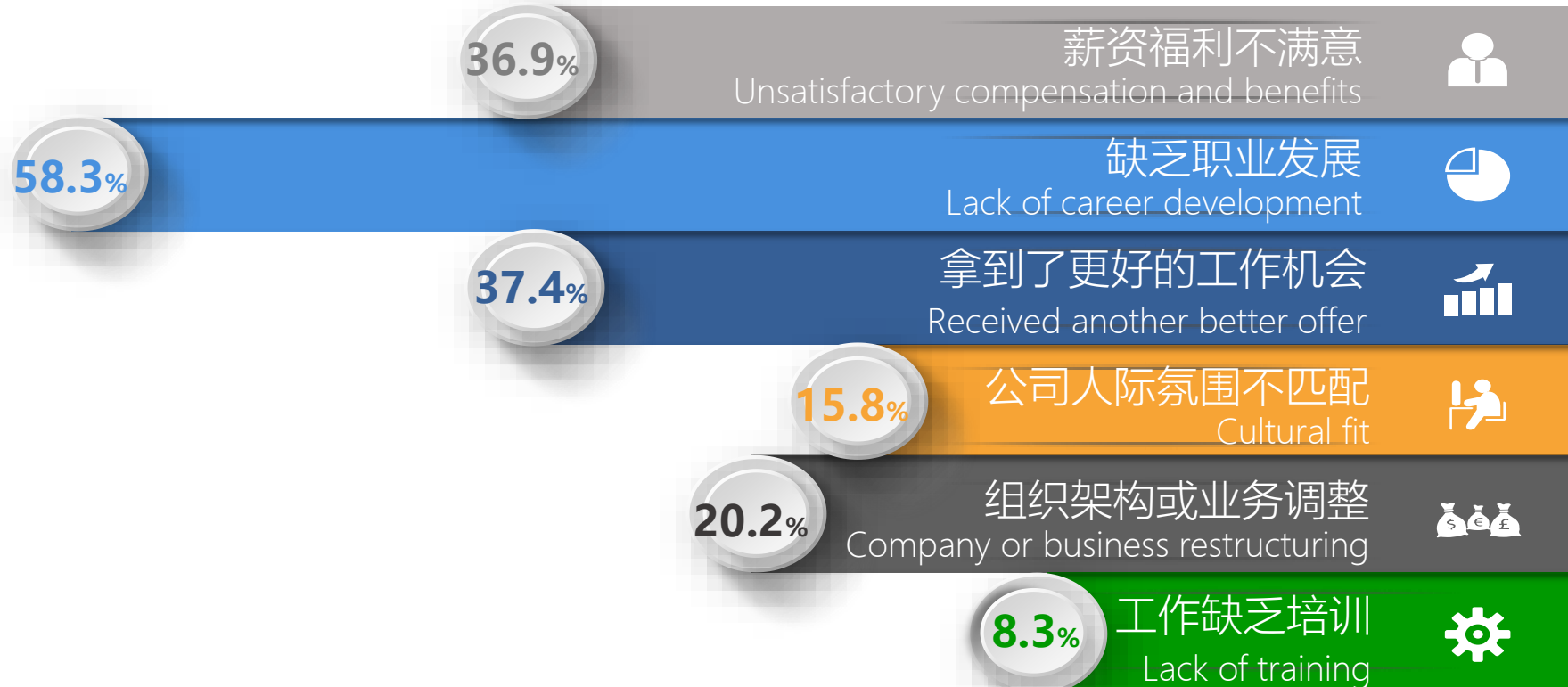- 02 医学事务 Medical Affairs (2016：市场 Marketing)
- 03 研发 R&D (2016：临床 Clinical)

离职原因分析
REASONS FOR LEAVING

员工离职较高的主要原因是企业缺乏职业发展，比薪资福利的不匹配高出21.4%。
Lack of career development cited as No. 1 reason for leaving, 21.4 % higher than unsatisfactory compensation & benefits.

36.9%
薪资福利不满意
Unsatisfactory compensation and benefits

58.3%
缺乏职业发展
Lack of career development

37.4%
拿到了更好的工作机会
Received another better offer

15.8%
公司人际氛围不匹配
Cultural fit

20.2%
组织架构或业务调整
Company or business restructuring

8.3%
工作缺乏培训
Lack of training

招聘与应聘关注点的差异
DIFFERENCES IN EMPLOYER AND CANDIDATE PERCEPTION

只有1/3的雇主认为有能力的领导是企业对人才的吸引点。而过半的候选人认为有能力的领导很重要，企业通过相关的内训来提高领导层的能力。

Only 1/3 of employers feel that competent leaders are important for candidate attraction but more than half of candidates rate it as very important.
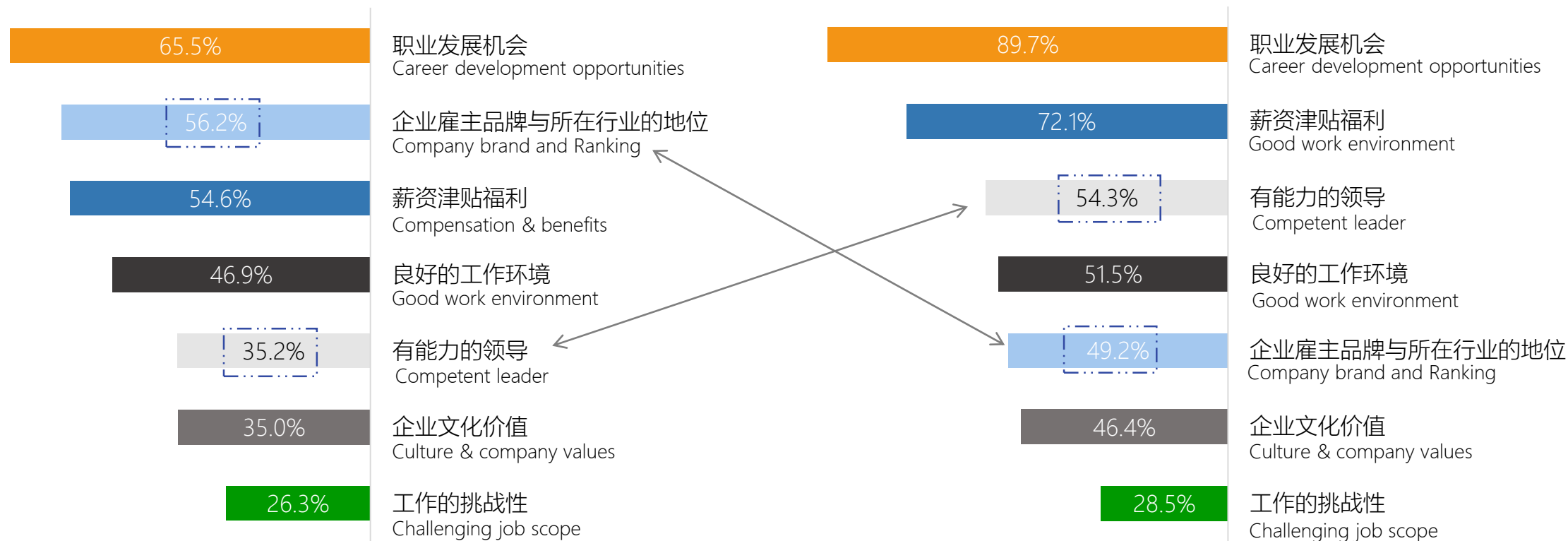
企业认为雇主品牌是第二吸引点，候选人选认为不重要。

Employers rank company brand at Top 2 attraction factor while candidates rate it as not important.

企业对人才吸引点
EMPLOYER VALUE PROPOSITION

人才求职关注点
CANDIDATE'S PERCEPTION OF EVP

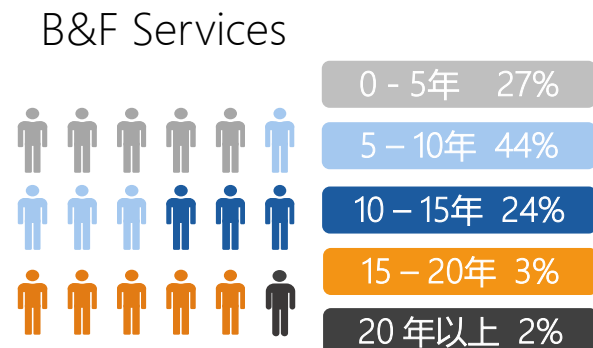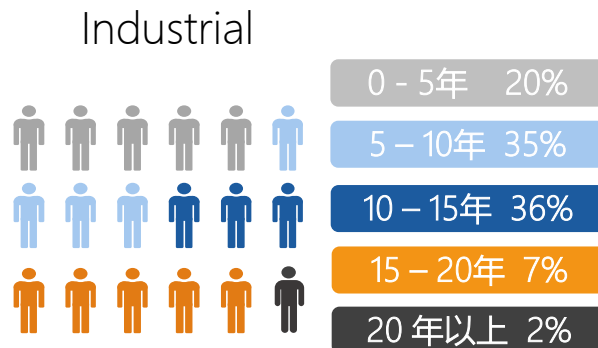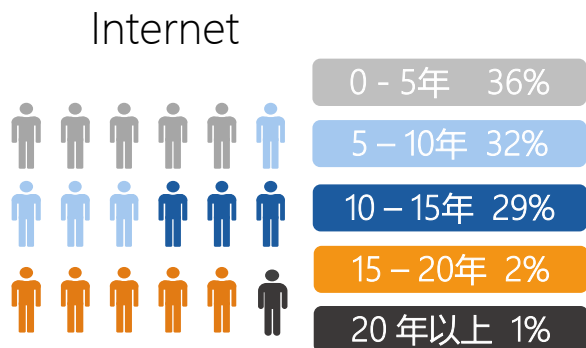| 企业对人才吸引点	人才求职关注点
65.5% 职业发展机会 Career development opportunities	89.7% 职业发展机会 Career development opportunities
56.2% 企业雇主品牌与所在行业的地位 Company brand and Ranking	72.1% 薪资津贴福利 Good work environment
54.6% 薪资津贴福利 Compensation & benefits	54.3% 有能力的领导 Competent leader
46.9% 良好的工作环境 Good work environment	51.5% 良好的工作环境 Good work environment
35.2% 有能力的领导 Competent leader	49.2% 企业雇主品牌与所在行业的地位 Company brand and Ranking
35.0% 企业文化价值 Culture & company values	46.4% 企业文化价值 Culture & company values
26.3% 工作的挑战性 Challenging job scope	28.5% 工作的挑战性 Challenging job scope

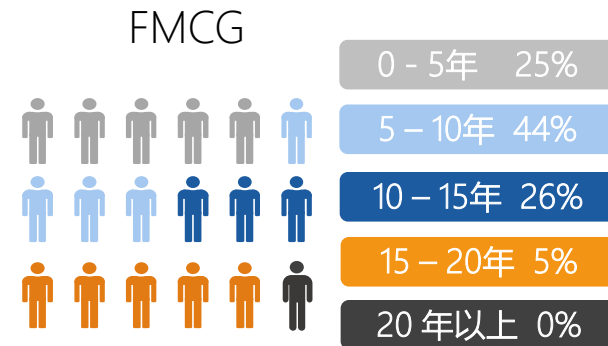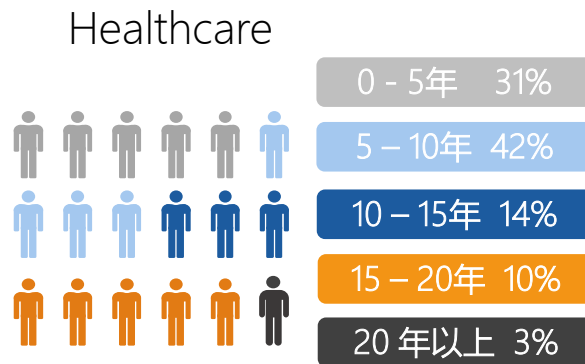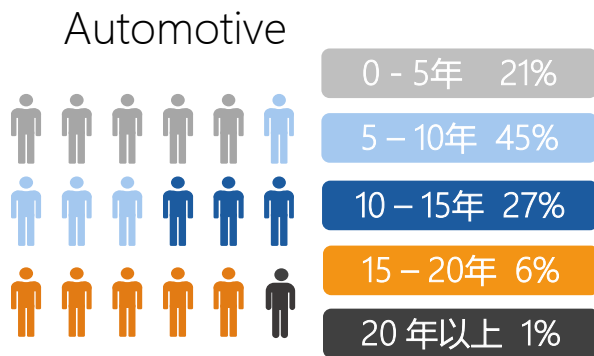招聘现状与趋势
HIRING TRENDS

PART D

各行业的年龄结构比较
EMPLOYEE AGE GROUP BY INDUSTRIES

1/3 互联网行业的员工小过5年工作经验，而工业小于5年工作经验的员工占比1/5。

More than 1 in 3 of Internet candidates have less than 5 years of work experience compared to 1 in 5 for Industrial.

Automotive

0 - 5年	21%
5 – 10年	45%
10 – 15年	27%
15 – 20年	6%
20 年以上	1%

Healthcare

0 - 5年	31%
5 – 10年	42%
10 – 15年	14%
15 – 20年	10%
20 年以上	3%

FMCG

0 - 5年	25%
5 – 10年	44%
10 – 15年	26%
15 – 20年	5%
20 年以上	0%

Internet

0 - 5年	36%
5 – 10年	32%
10 – 15年	29%
15 – 20年	2%
20 年以上	1%

Industrial

0 - 5年	20%
5 – 10年	35%
10 – 15年	36%
15 – 20年	7%
20 年以上	2%

B&F Services

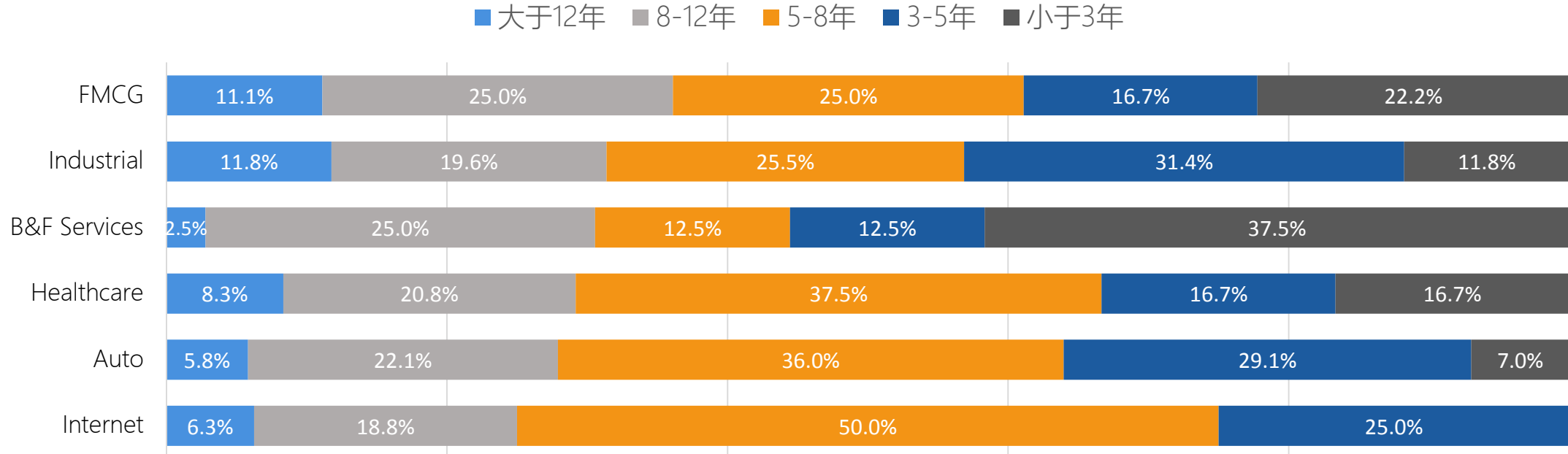|	
0 - 5年	27%
5 – 10年	44%
10 – 15年	24%
15 – 20年	3%
20 年以上	2%

最难招聘的年龄段
DIFFICULT TO HIRE AGE GROUP

大多数企业最难招聘的年龄层在25岁-34岁。
25-34 years old is the most sought after age group across industries.

8年以上工作年限的候选人，在快消品业，银行金融业及工业，相对比较难招。
FMCG, B&F and Industrial have higher difficulty hiring candidates with more than 8 years old experience.

5-8年工作年限的候选人，在汽车行业，互联网行业及医药行业，相对比较难招。
Automotive, Internet and Healthcare have higher difficulty hiring candidates with 5-8 years old experience.
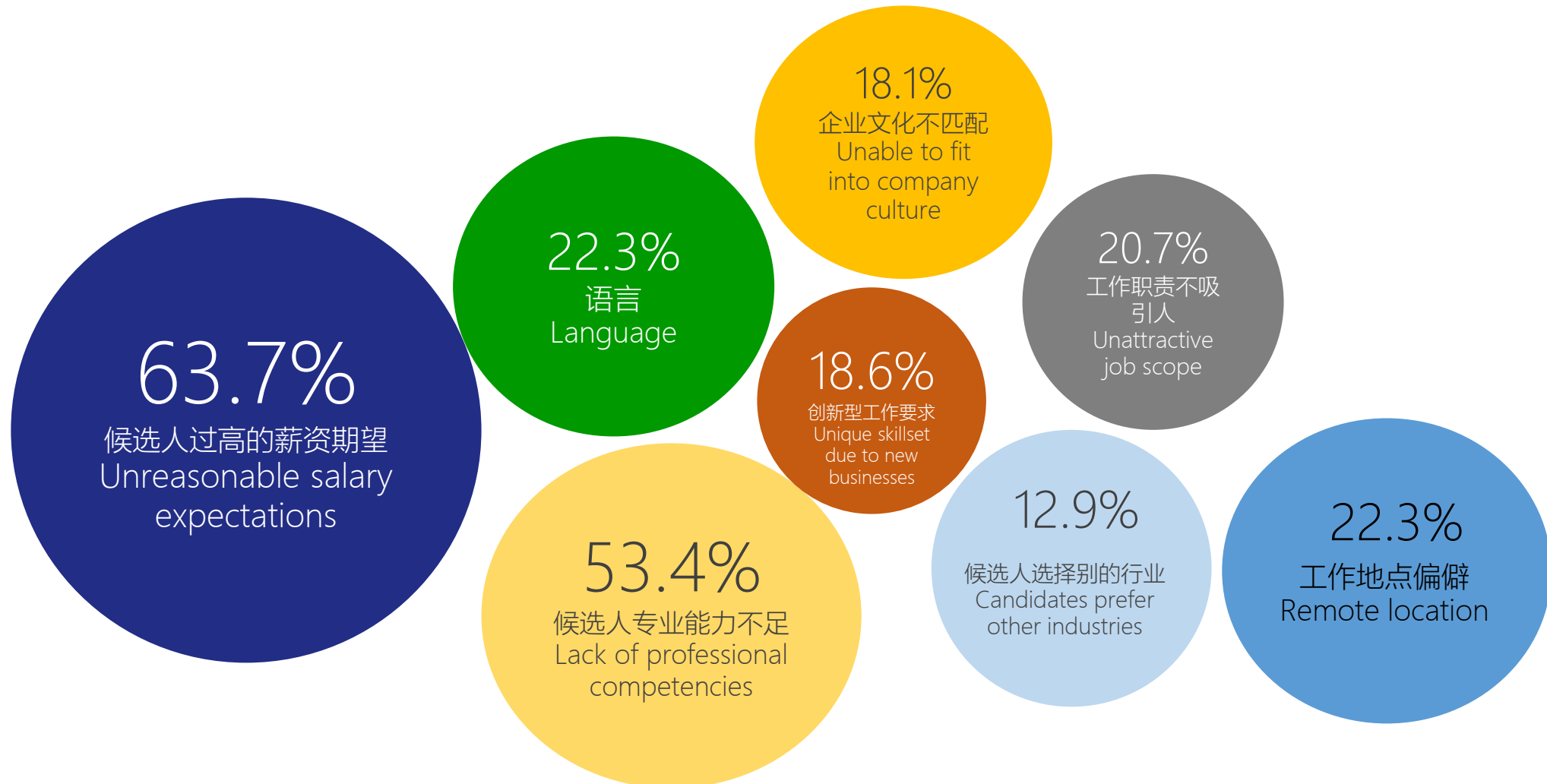
图例：■ 大于12年 ■ 8-12年 ■ 5-8年 ■ 3-5年 ■ 小于3年

行业	大于12年	8-12年	5-8年	3-5年	小于3年
FMCG	11.1%	25.0%	25.0%	16.7%	22.2%
Industrial	11.8%	19.6%	25.5%	31.4%	11.8%
B&F Services	2.5%	25.0%	12.5%	12.5%	37.5%
Healthcare	8.3%	20.8%	37.5%	16.7%	16.7%
Auto	5.8%	22.1%	36.0%	29.1%	7.0%
Internet	6.3%	18.8%	50.0%	25.0%	

招聘难点分析
RECRUITMENT CHALLENGES

候选人过高的薪资期望和专业能力不匹配是企业招聘候选人的最主要的难点
Unreasonable salary expectations and lack of professional competencies are key HR challenges.

18.1%
企业文化不匹配
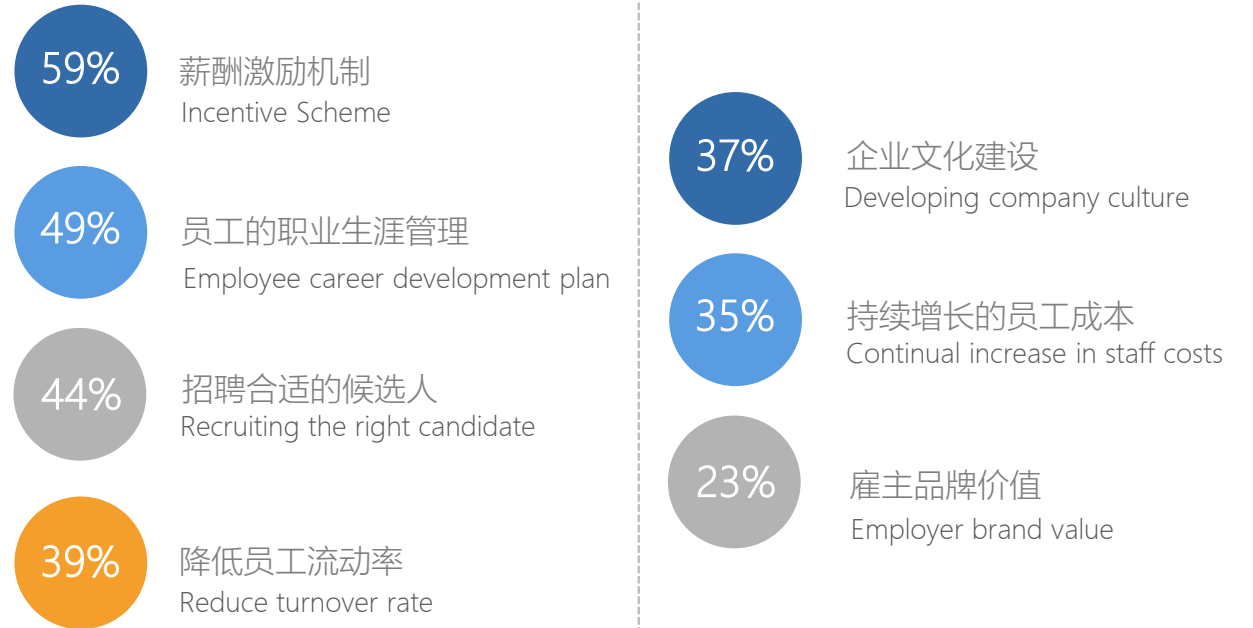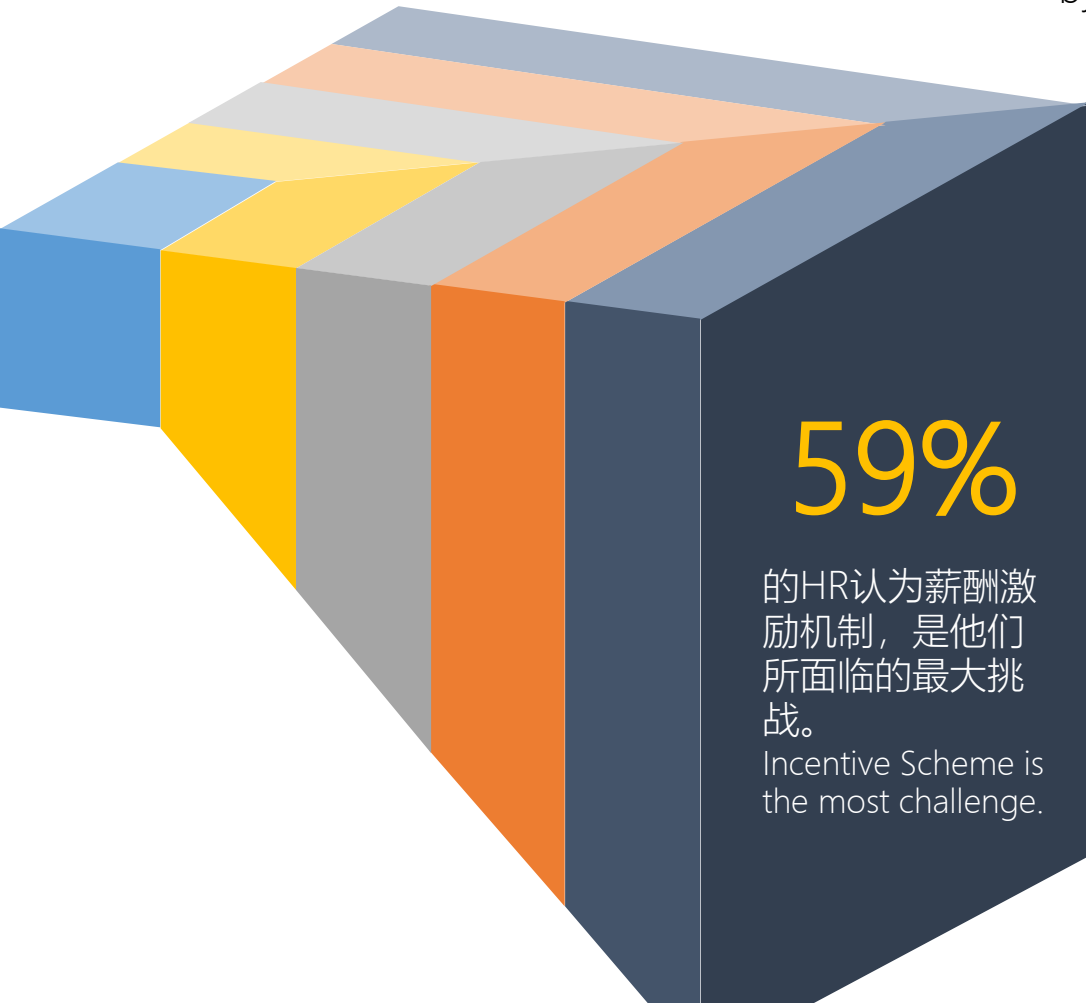Unable to fit into company culture

20.7%
工作职责不吸引人
Unattractive job scope

22.3%
语言
Language

18.6%
创新型工作要求
Unique skillset due to new businesses

63.7%
候选人过高的薪资期望
Unreasonable salary expectations

53.4%
候选人专业能力不足
Lack of professional competencies

12.9%
候选人选择别的行业
Candidates prefer other industries

22.3%
工作地点偏僻
Remote location

人力资源挑战
HR CHALLENGES

PART E

面试中，影响候选人对雇主满意度的因素
CANDIDATE SATISFACTION

及时有效的面试反馈，会提高候选人对雇主的满意度。
Responsive & effective interview feedback will improve the candidate satisfaction.

48.50%
面试过程中的有效互动
Opportunity to ask questions during interview

43.52%
面试后，对所申请的公司及职位的认知
Understanding about the company/position after the interview

59.30%
及时有效的面试反馈
Responsive & effective interview feedback

55.48%
公司的工作环境
Work environment

56.98%
面试官的专业程度
Professionalism of the interviewer

39.45%
面试流程的效率
Efficiency of interview process

候选人趋势
CANDIDATE LANDSCAPE

PART F

候选人学历比较
CANDIDATE ACADEMIC QUALIFICATION

医疗健康行业和工业制造行业对人才的学历要求更高，硕士学历的占比相对其他行业较高。

Healthcare and Industrial have more Masters than other industries.

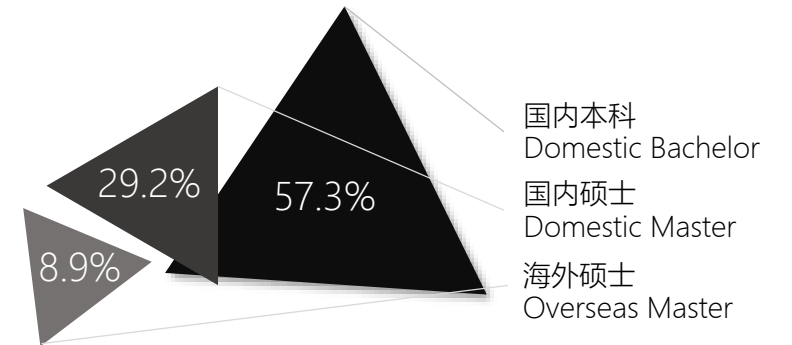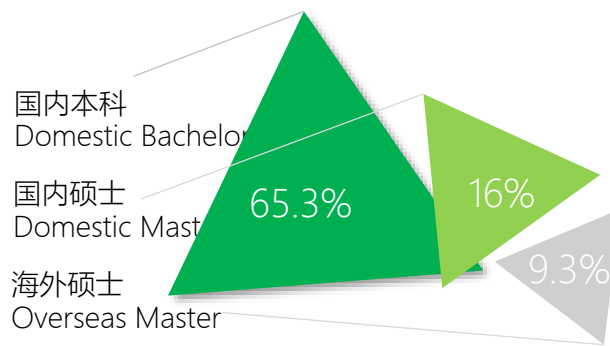Automotive

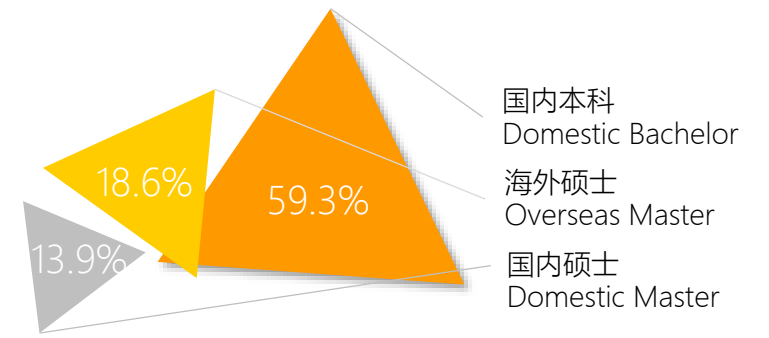国内本科 Domestic Bachelor
国内硕士 Domestic Master
海外硕士 Overseas Master
66.7% 22.3% 6.7%

FMCG

国内本科 Domestic Bachelor
国内硕士 Domestic Master
海外硕士 Overseas Master
12.6% 70.1% 5.8%

Industrial

国内本科 Domestic Bachelor
国内硕士 Domestic Master
海外硕士 Overseas Master
29.2% 57.3% 8.9%

Healthcare

国内本科 Domestic Bachelor
国内硕士 Domestic Master
海外硕士 Overseas Master
56.1% 31.6% 5.3%

Internet

国内本科 Domestic Bachelor
国内硕士 Domestic Master
海外硕士 Overseas Master
65.3% 16% 9.3%

B&F Services

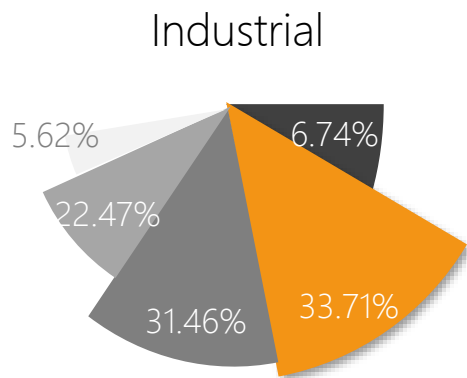国内本科 Domestic Bachelor
海外硕士 Overseas Master
国内硕士 Domestic Master
18.6% 59.3% 13.9%
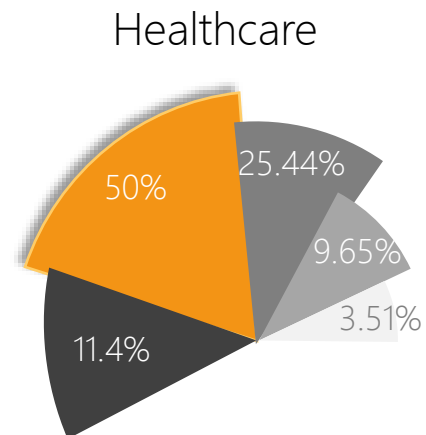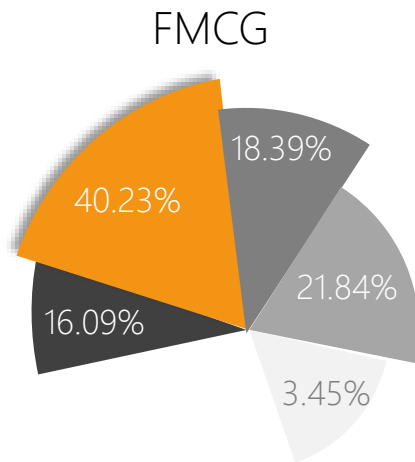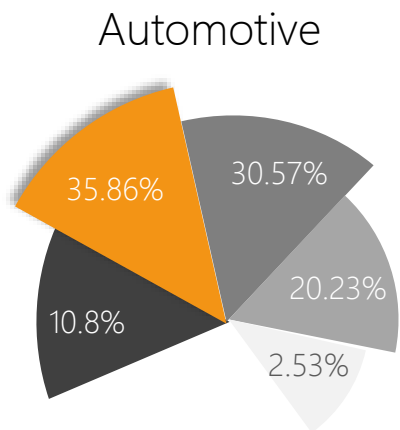
候选人的稳定性
CANDIDATE STABILITY

超半数的医药, 快消和互联网行业人群会在3年内离职。
More than 50% of Healthcare, FMCG and Internet candidates will change job within 3 years.

| 小于1年 |
| 1-3年 |
| 3-5年 |
| 5-10年 |
| 10年以上 |

Automotive
35.86%
30.57%
20.23%
10.8%
2.53%

FMCG
40.23%
18.39%
21.84%
16.09%
3.45%

Healthcare
50%
25.44%
9.65%
11.4%
3.51%

Industrial
5.62%
6.74%
22.47%
33.71%
31.46%

Internet
18.67%
24%
44%
13.33%

B&F Services
26.74%
1.16%
3.49%
44.19%
24.42%

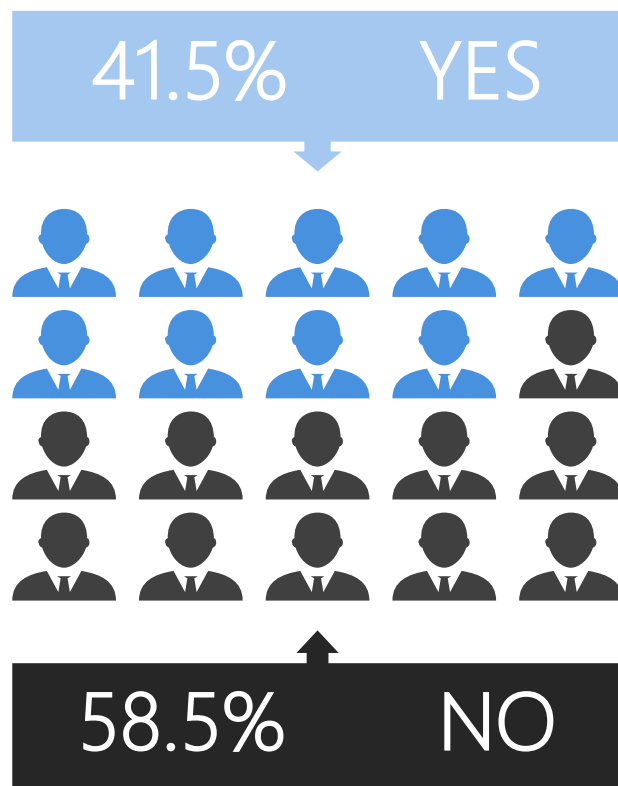| 0-5 年 |
| 5-10 年 |
| 10-15 年 |
| 15-20 年 |
| 20 年以上 |
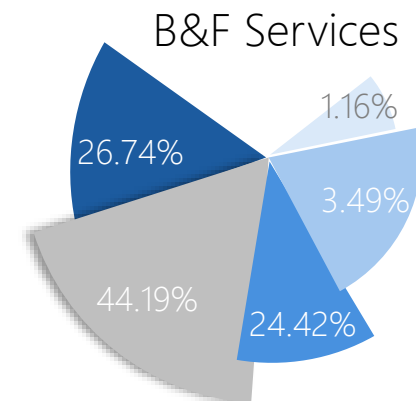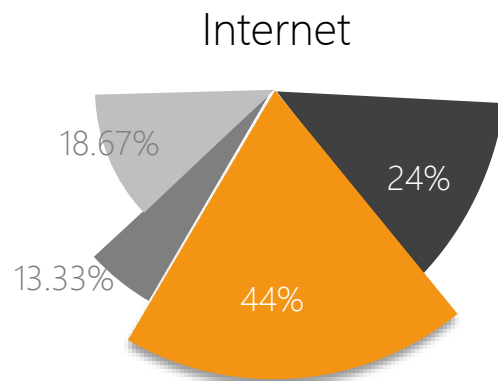
候选人即使拿到offer，依旧会看新机会
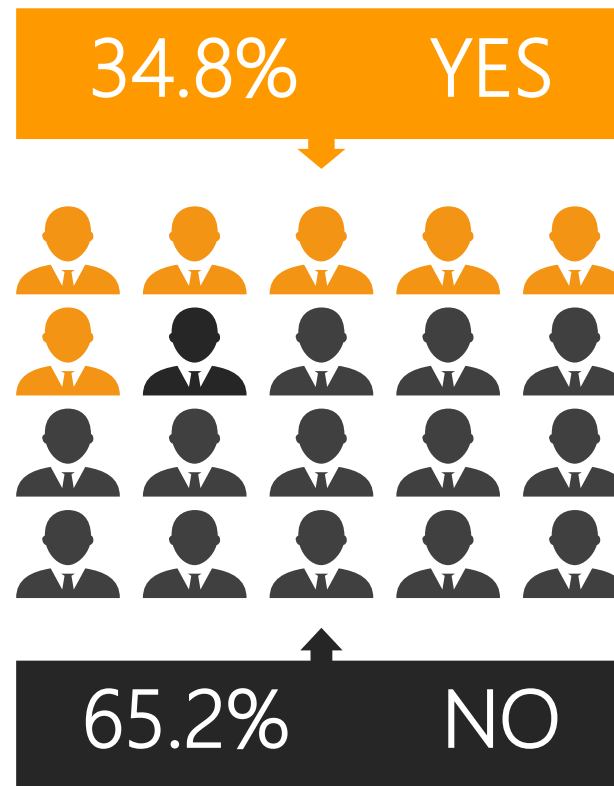## CANDIDATES ARE STILL OPEN TO OPPORTUNITIES AFTER ACCEPTING AN OFFER

5候选人拿到offer后，其中有2个人会看新机会

2 in 5 candidates are still open to opportunities after accepting an offer

3个候选人入职后，其中3个人会看新机会

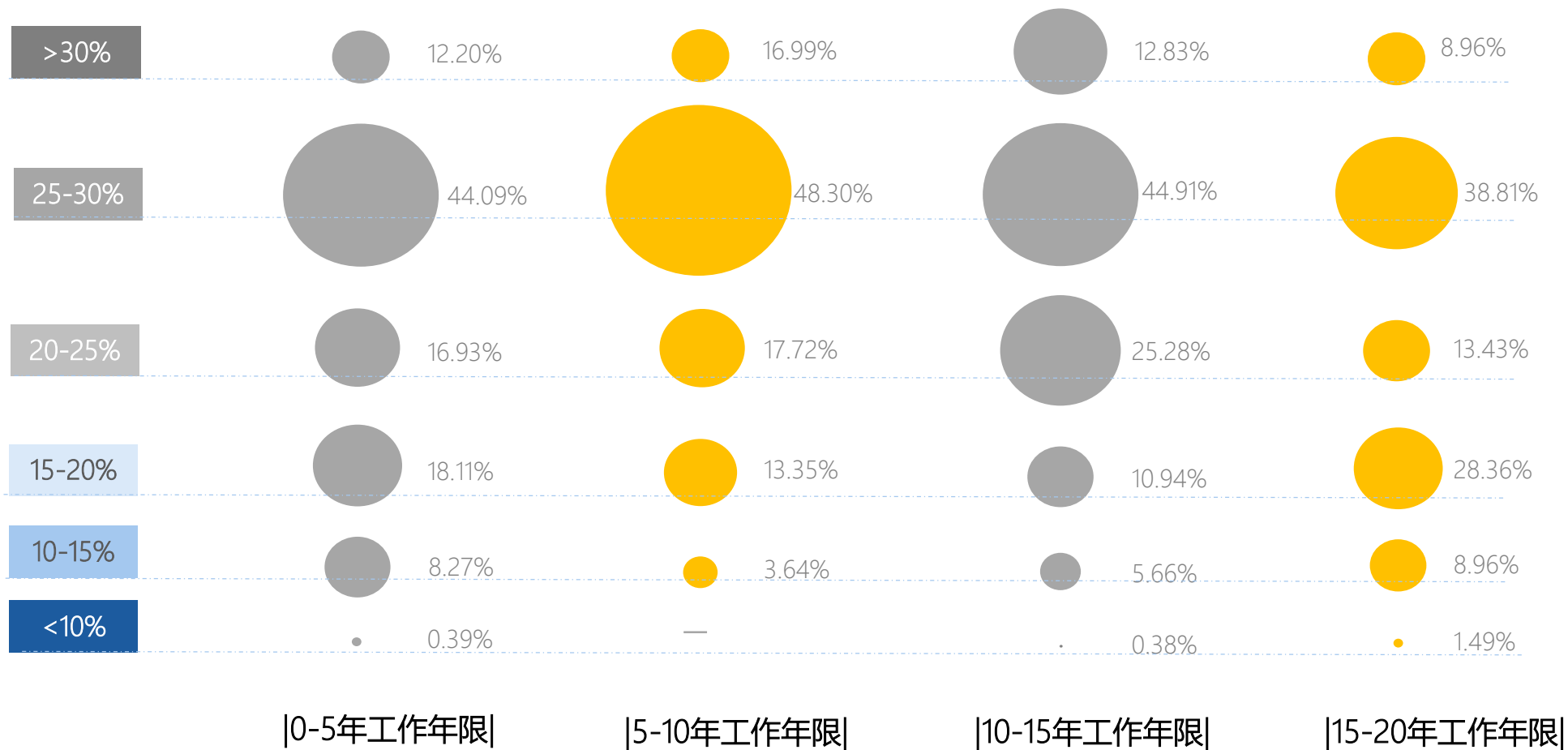1 in 3 candidates are still open to opportunities after onboarding

41.5%　　YES

34.8%　　YES

58.5%　　NO

65.2%　　NO

不同工作年限的候选人对薪资涨幅的不同期望
CANDIDATE SENIORITY VS SALARY EXPECTATION

超过半数的候选人要求25%以上的薪资涨幅。
More than 50% of candidates expect salary increments of 25% and above.

具有5-10年工作年限的候选人，对薪资涨幅要求最高。
Candidates with 5-10 years of work experience have higher salary expectations.

	|0-5年工作年限|	|5-10年工作年限|	|10-15年工作年限|	|15-20年工作年限|
>30%	12.20%	16.99%	12.83%	8.96%
25-30%	44.09%	48.30%	44.91%	38.81%
20-25%	16.93%	17.72%	25.28%	13.43%
15-20%	18.11%	13.35%	10.94%	28.36%
10-15%	8.27%	3.64%	5.66%	8.96%
<10%	0.39%	—	0.38%	1.49%

不同年限的候选人，看重新机会的哪些方面
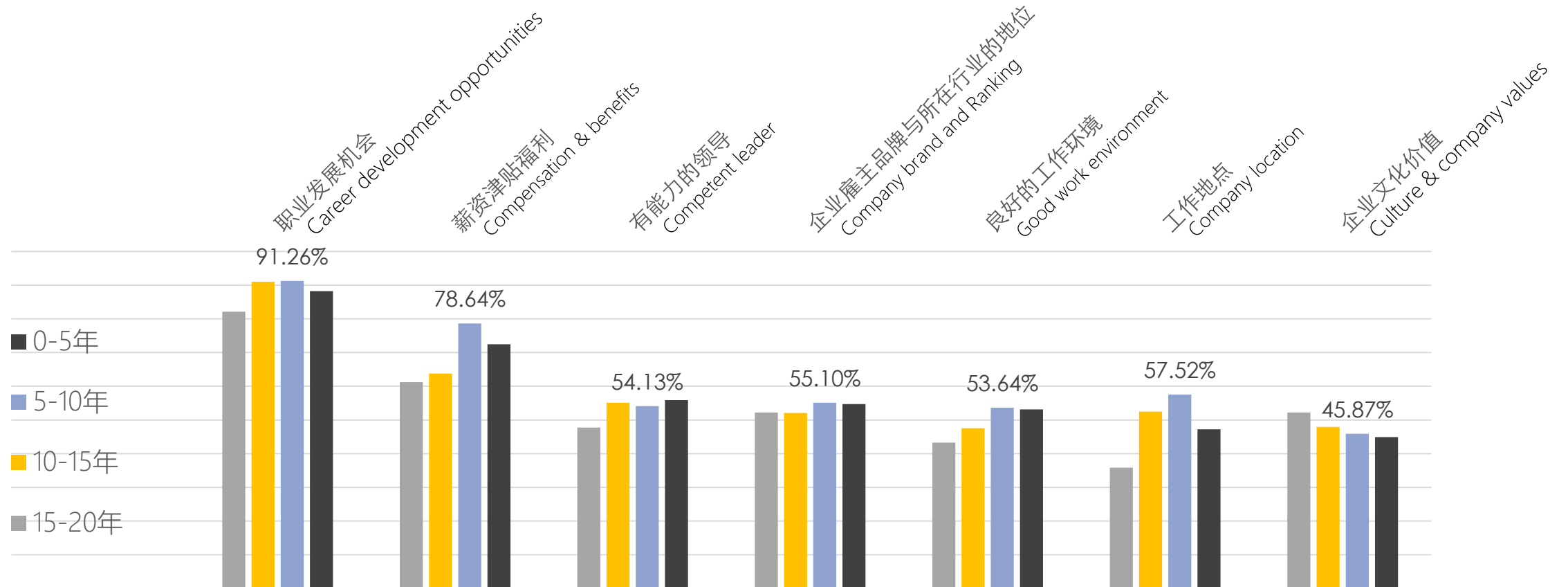## CANDIDATE SENIORITY VS EXPECTATION ON COMPANY

薪资津贴福利对5-10年的候选人相比比较重要。
Candidates with 5-10 years of work experience are most sensitive to compensation & benefits.

少过10年工作经验的候选人更重视工作环境。
Candidates with less 10 years of work experience are more particular about work environment.

职业发展机会
Career development opportunities

薪资津贴福利
Compensation & benefits

有能力的领导
Competent leader

企业雇主品牌与所在行业的地位
Company brand and Ranking

良好的工作环境
Good work environment

工作地点
Company location

企业文化价值
Culture & company values

91.26%
78.64%
54.13%
55.10%
53.64%
57.52%
45.87%

0-5年
5-10年
10-15年
15-20年