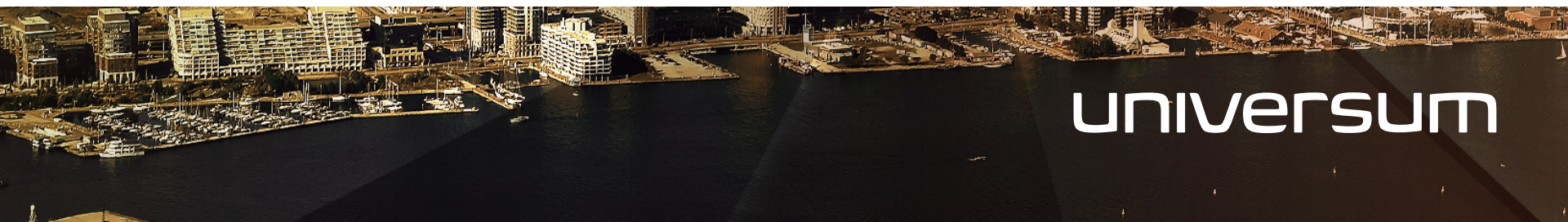




2014 Universum Canada Student Survey

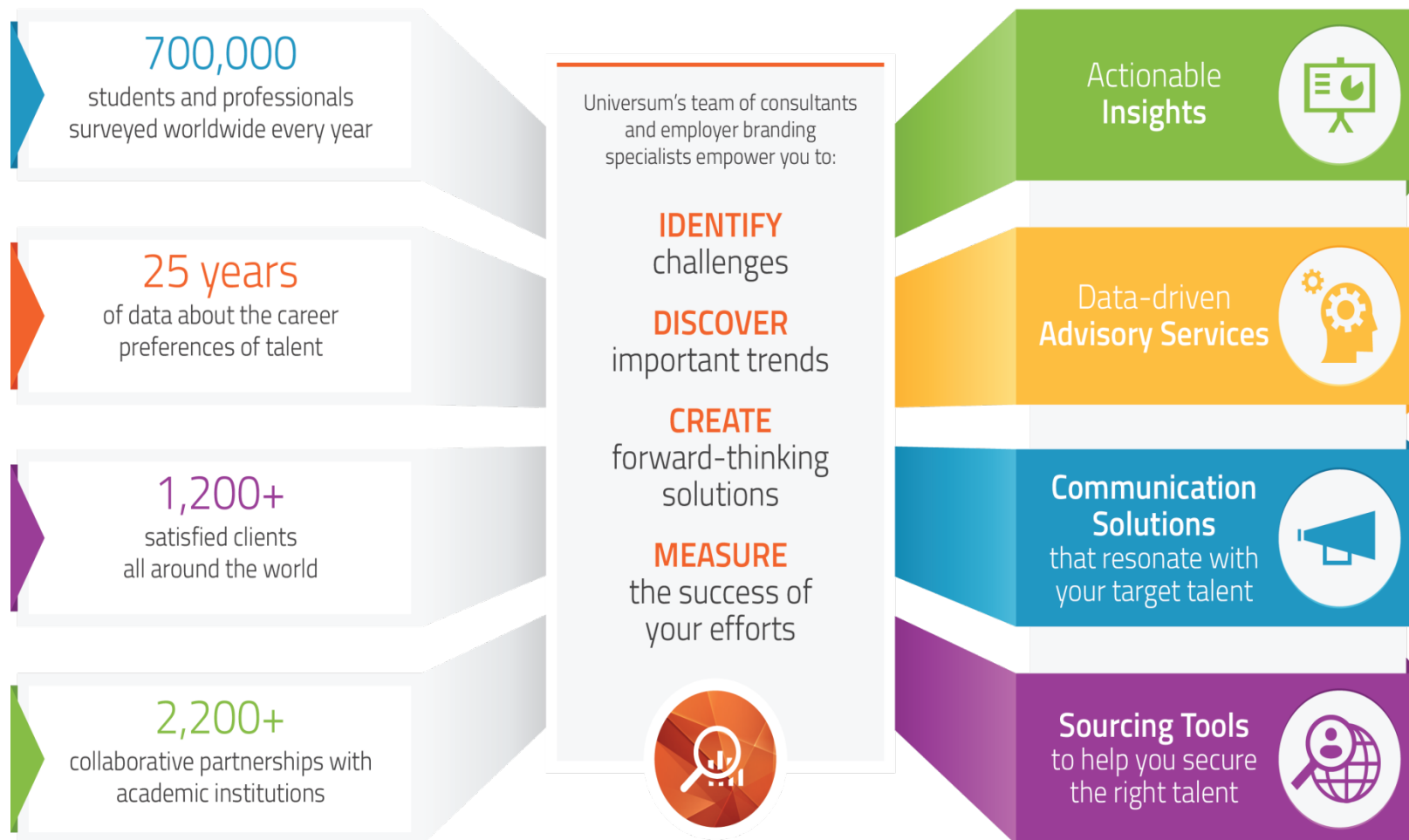
Key Attitudes of Students



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About Universum

At Universum, we believe it's not only about knowing how companies rank, but why they rank. Our global presence in core and emerging markets, coupled with unrivalled depth and breadth of our data help you make informed decisions around how to craft your Employer Brand and build a strong talent pool for the future.



The Student Survey Methodology

Each year, Universum runs the largest global survey on millennial career preferences. In each of our 30+ survey markets, we partner with top universities to survey the most desirable future talent and find out who they want to work for and why. The more votes a company receives, the higher they rank on the Ideal Employer list.

The 2014 Canadian student survey was conducted online, between mid-October 2013 and late-February 2014, under Universum's student brand, *Wetfeet*. The results in this report reflect the aggregated perceptions of nearly 30,000 undergraduate students from 107 universities and colleges.*

*See appendix for further details on Universum's Student Survey methodology

Students in all fields of study widened their view, considering more employers*

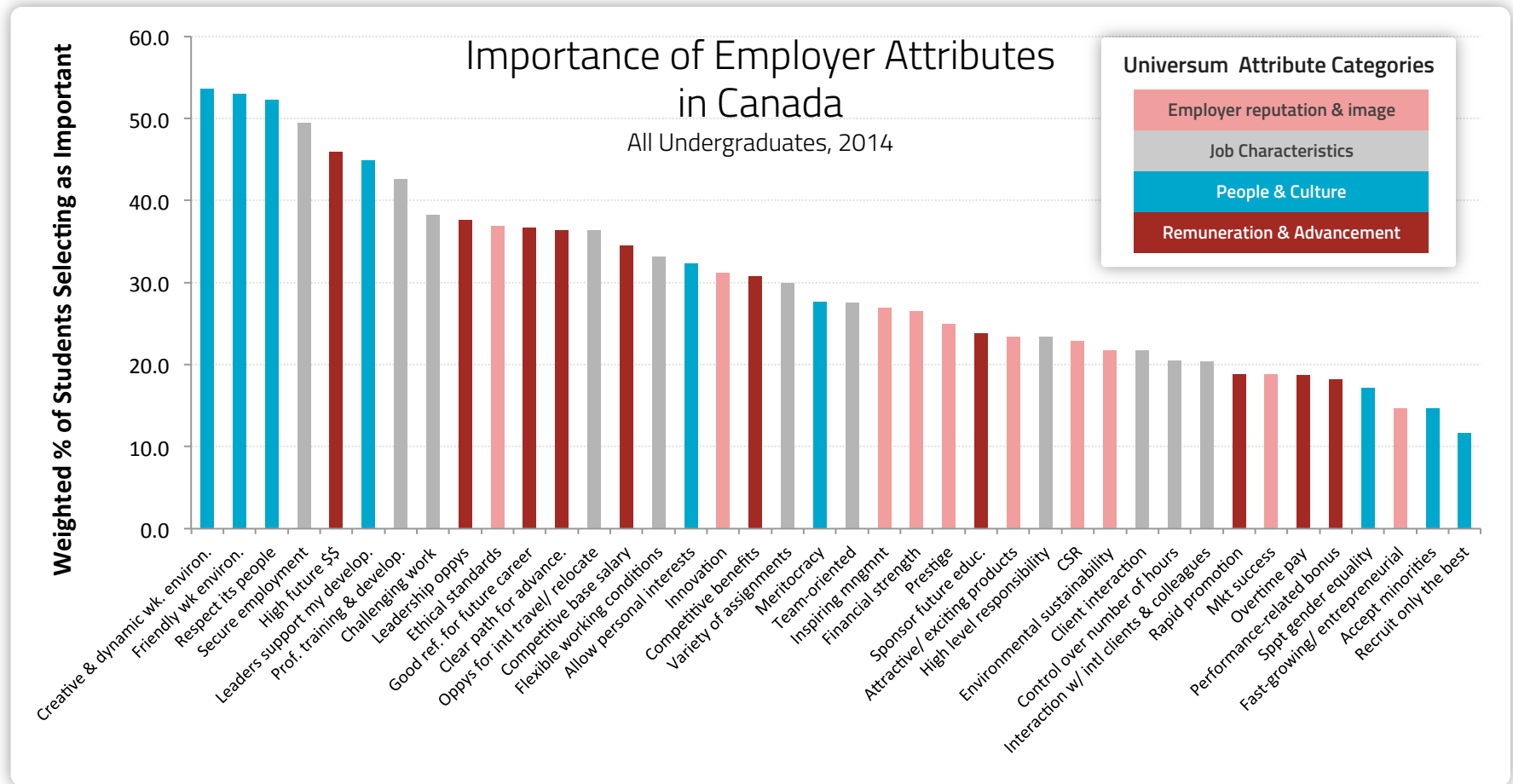
- **Business students are the most flexible** – they remain among the most willing to consider a wide variety of employers (an average of 21.0)
- **...followed by Engineering/IT students.**
- **Health/Medicine students were the least flexible**, selecting among the fewest Considered and Ideal Employers (an average of 7.2)

Main Field of Study	Considered Employers		
	2014	2013	Delta
Business	21.0	18.8	2.2
Engineering/IT	19.4	15.4	4.0
Natural Science	11.1	9.9	1.2
Liberal Arts	11.8	10.1	1.7
Law	12.0	9.5	2.5
Health/Medicine	7.2	6.0	1.2
ALL UNDERGRADS	15.4	13.2	2.2

← **Engineering/IT students** saw the largest increase from last year in the number of employers they would consider.

*Increase comes despite Universum's company list shortening from 150 to 140 potential employers

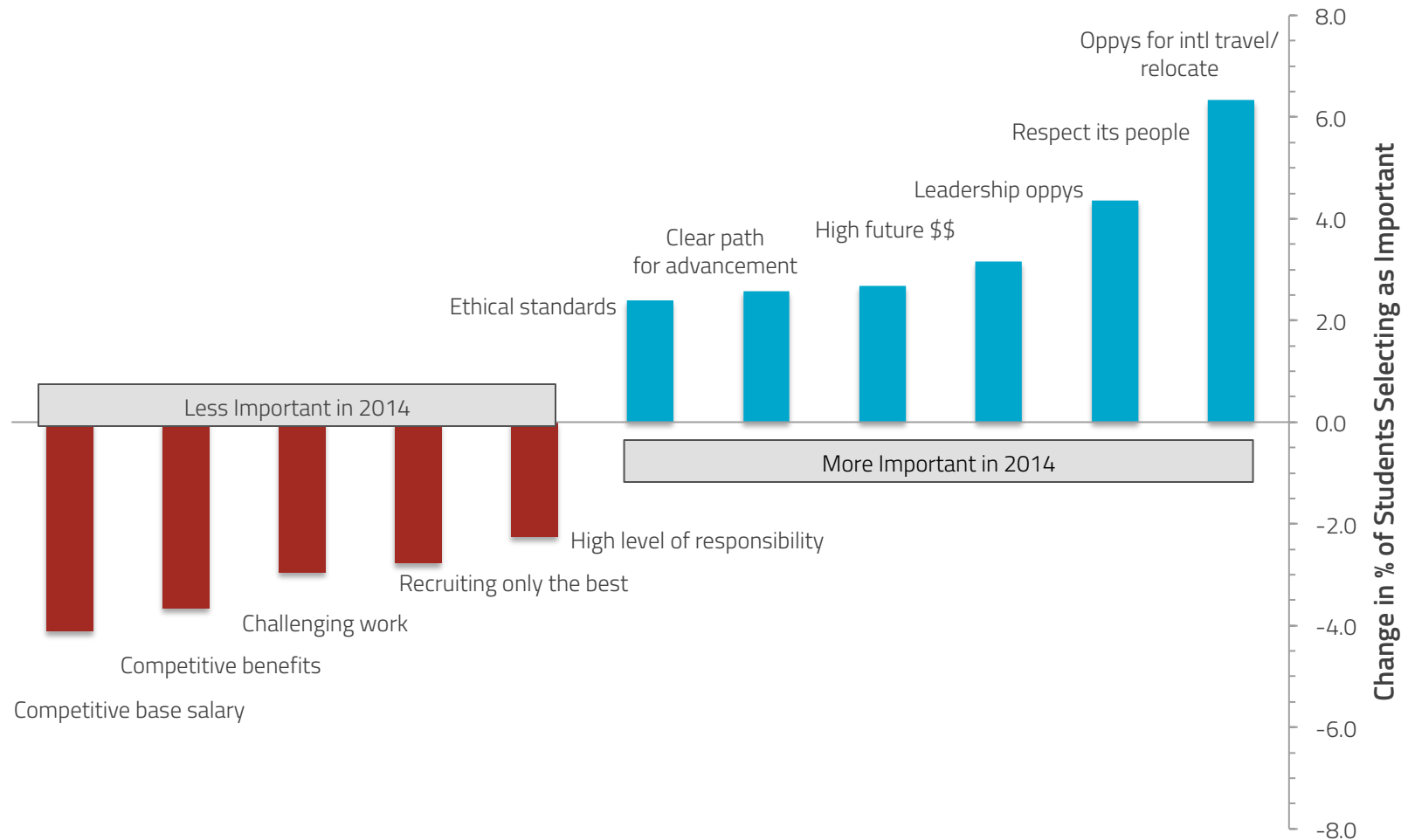
Canadian students emphasize the organizational culture when assessing employers



Canadian students are increasingly interested in international opportunities

Changes in Attractiveness of Employer Attributes

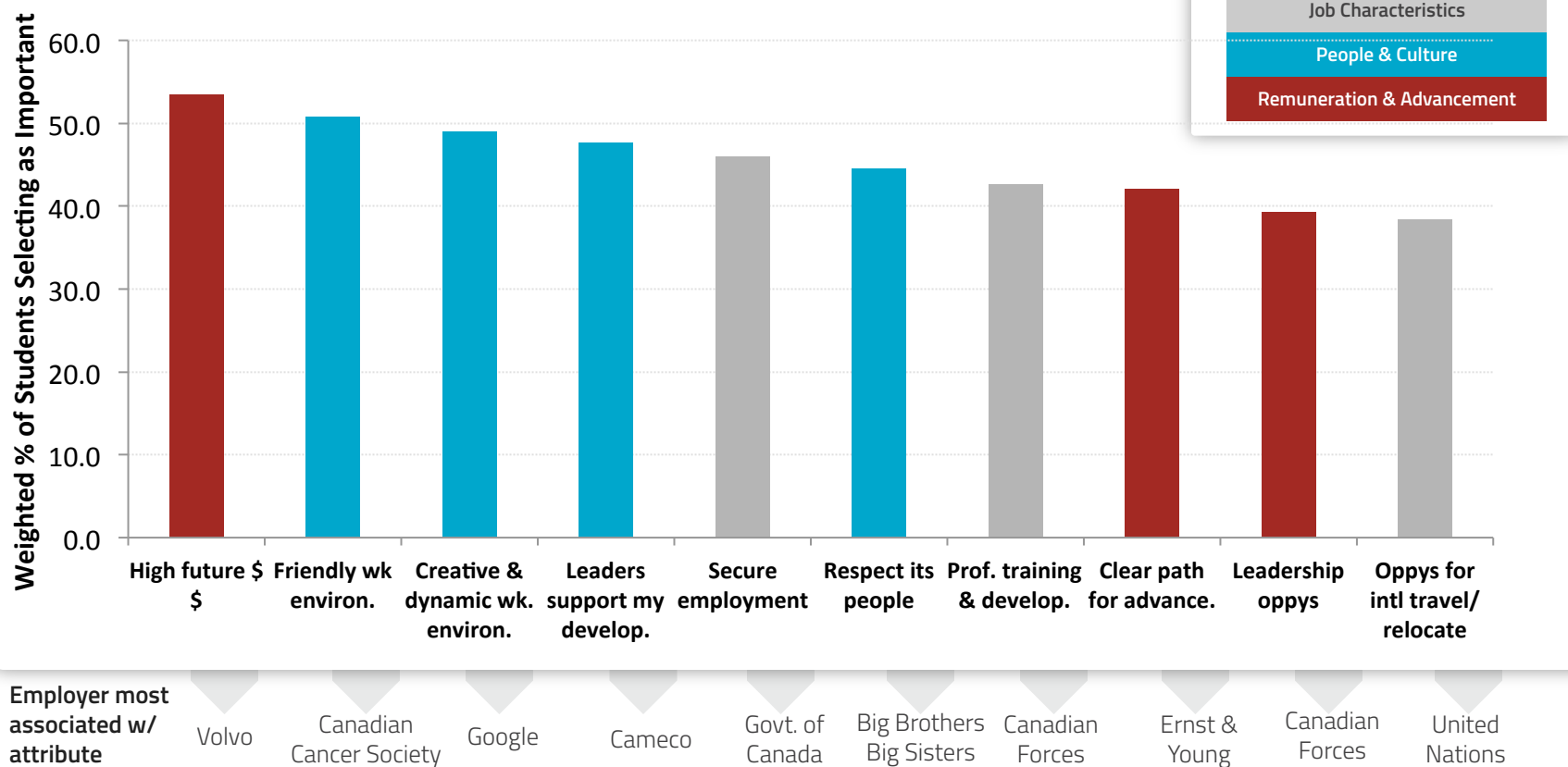
All Canadian Undergraduates, 2014 vs. 2013



Business students associate government and NGO employers with many of their most favored attributes

Like the broader population, business students prioritize an organization's organizational culture (with the exception of high future earnings as the #1 preference)

Top 10 Employer Attributes for Canadian Business Students, 2014



Business students' changing choices of employers...

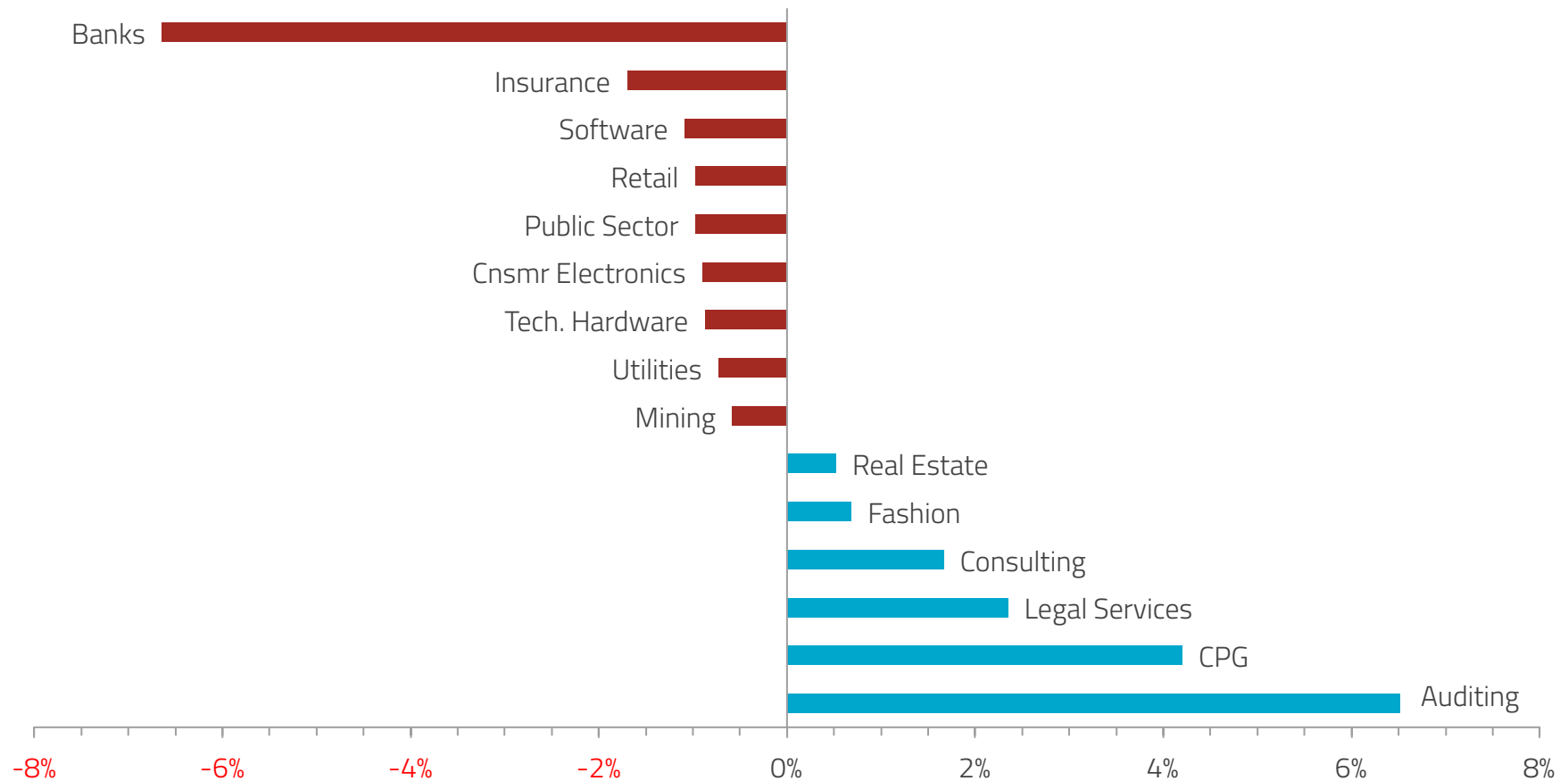
	Biggest Gains	Biggest Losses
Business	<p>Government: RCMP, Canadian Forces, SIS, and UN all gained. (Government of Canada gained mindshare*, but fell to #3 rank.)</p> <p>Auditing: 34% of business students now select auditing as one of their top 3 preferred industries, up from 27% last year and making this now the #1 industry preference for Canadian business students. Individual firms fared less well – EY climbed five ranks to #2, but KPMG and PwC fell a few ranks. (Deloitte stayed at rank #6, but lost percentage points.)</p> <p>Oil & Gas EnCana and BP Canada made biggest gains, but other oil & gas firms did well, with the exception of ExxonMobil, which lost. Mixed bag for hydropower utilities, with some gaining and some losing.</p>	<p>Financial Services: Most banks and insurers lost significantly (see slide 9).</p> <p>Consulting: Most firms lost ground, regardless of whether they have broad advisory offerings (e.g. KPMG) or are more specialized on strategy consulting (e.g. BCG, McKinsey).</p> <p>Consumer Packaged Goods: Kraft, Nestle, Mars, P&G, PepsiCo, J&J all fell. Exceptions: Unilever stayed steady, and Loblaws gained.</p>

*Mindshare is defined as the percentage of students selecting the employer as one of their five ideal employers.

...appear to contradict their changes in industry preferences

Change in Industry Preferences for Business Students

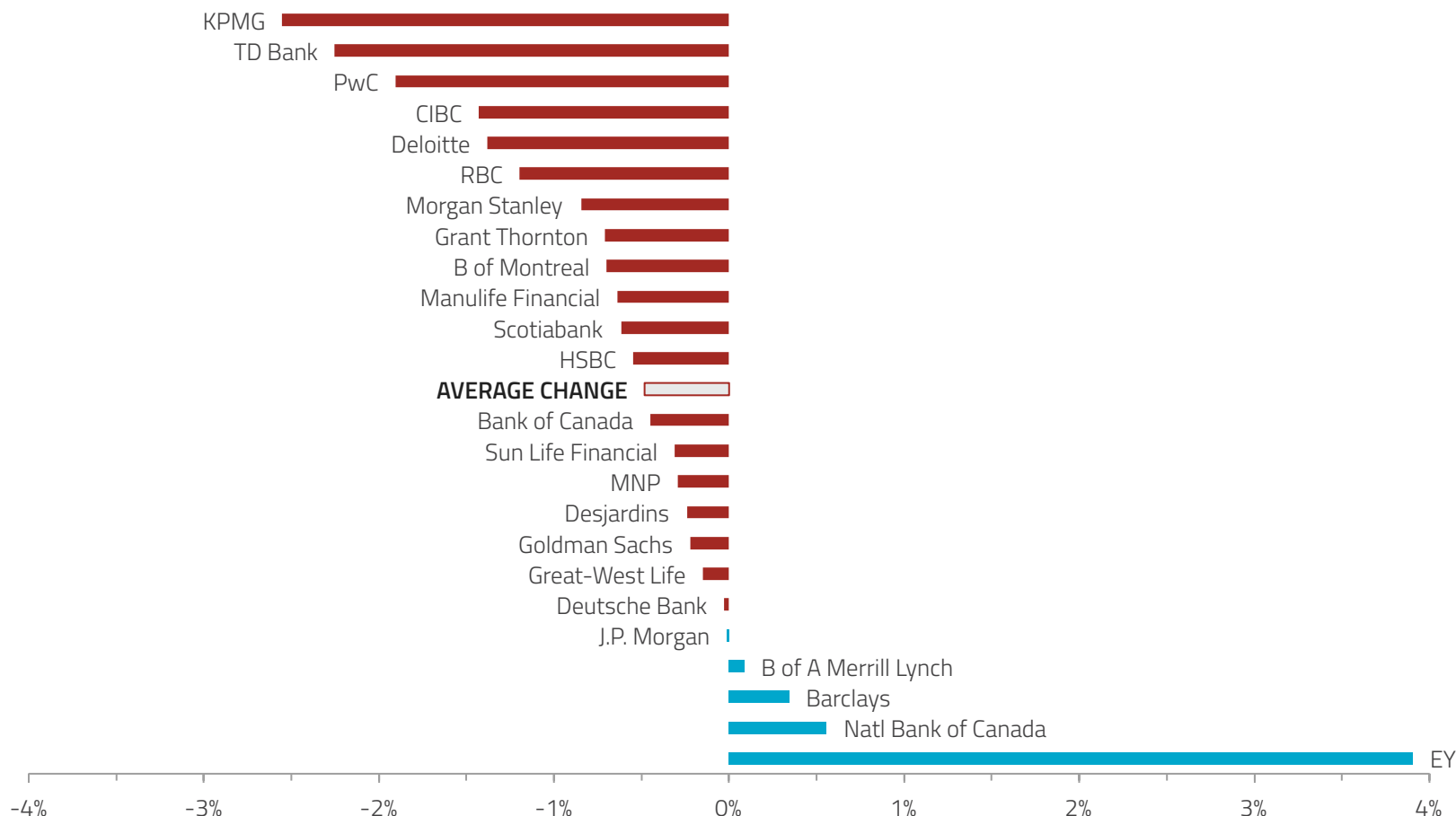
Canadian Undergraduates, 2014 vs. 2013



Part of this contradiction may have to do with the high variation in companies' year-over-year employer brand performance

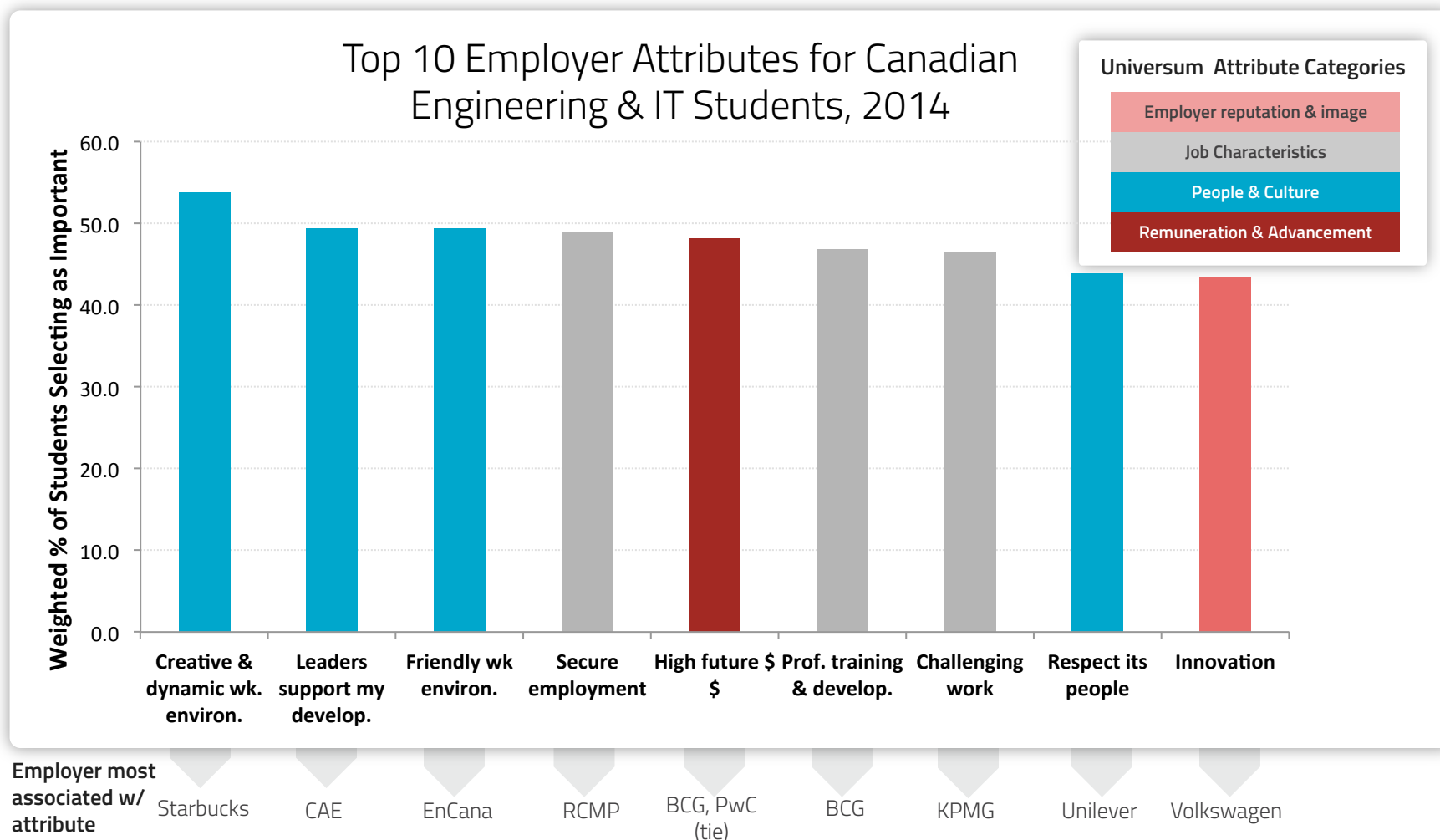
Changes in Attractiveness for Financial Sector Firms

Canadian Business Undergraduates, 2014 vs. 2013



Engineers are looking for employers with strong cultures that will allow them to grow — and finding them in surprising places

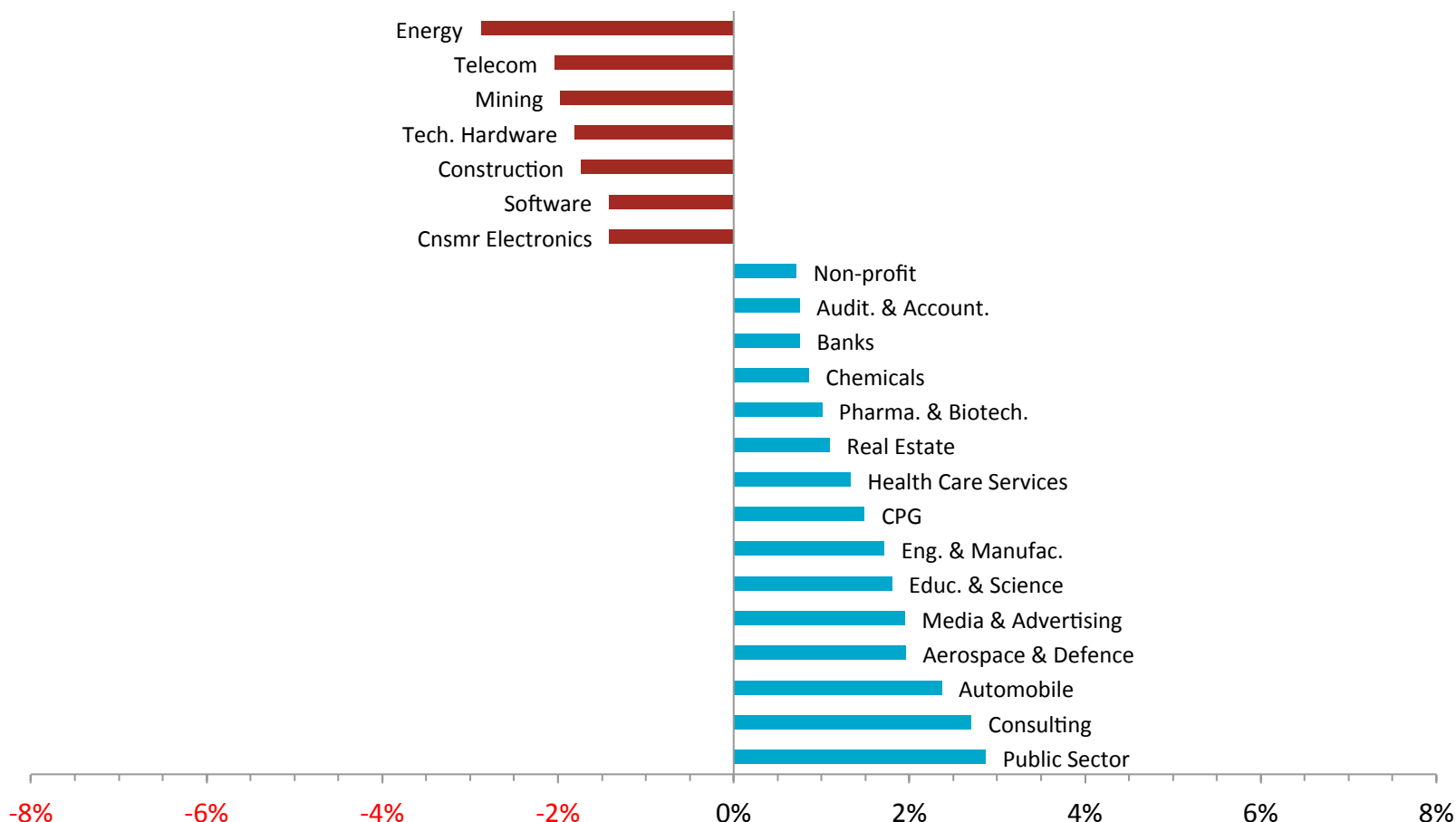
Engineering students associate their top preferred attributes with companies from a wide variety of industries – branching out of the typical engineering sectors.



Engineers are moving away from traditional sectors in terms of industry preferences as well.

Change in Industry Preferences for Engineering Students

Canadian Undergraduates, 2014 vs. 2013



Engineers' employer selections generally didn't follow industry patterns — with a few exceptions:

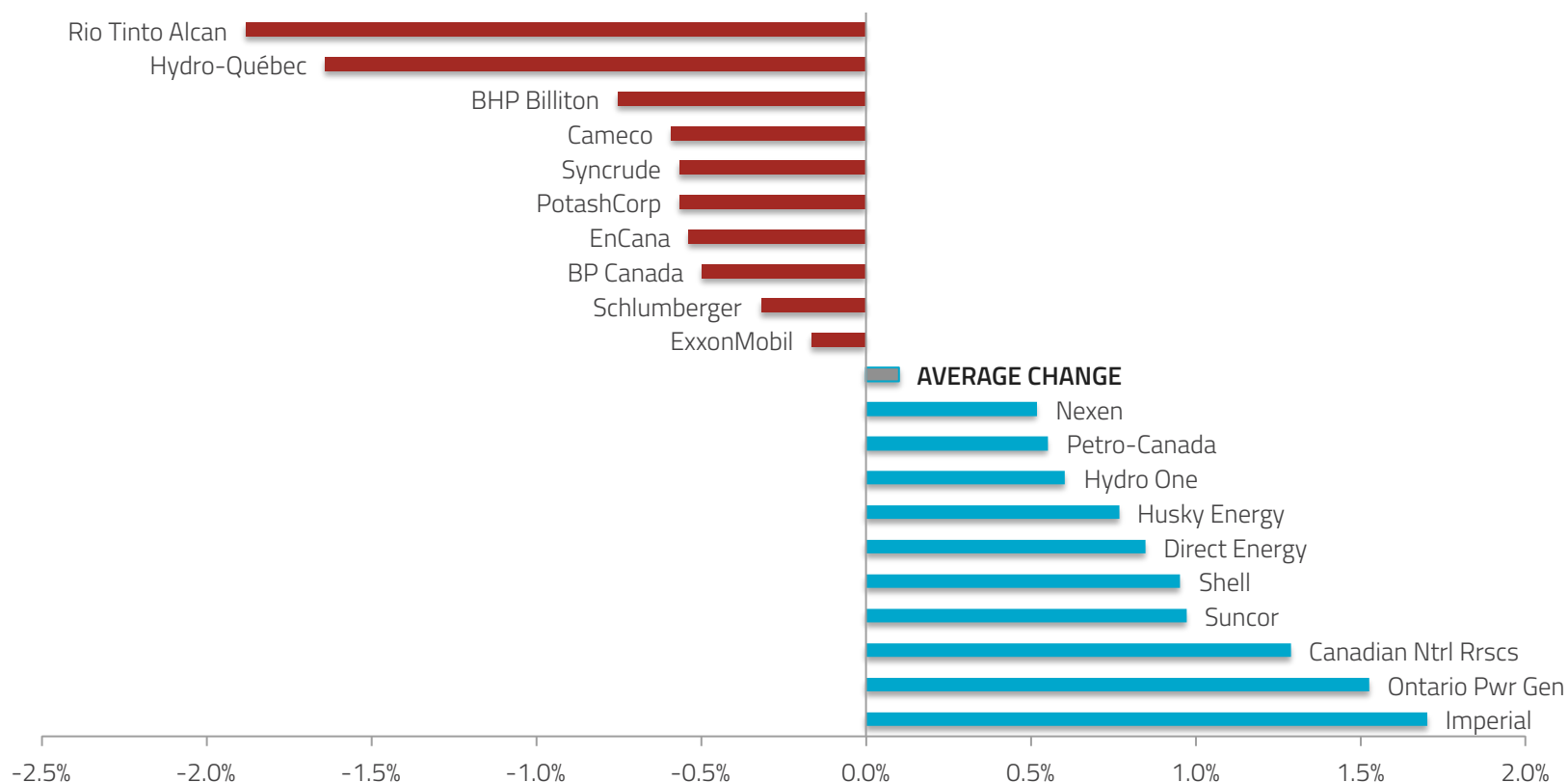
	Biggest Gains	Biggest Losses
Engineering & IT	<p>Government, health, and NGOs: Ranging from the Mounties to Doctors without Borders to the David Suzuki foundation, engineers' interest in employers that serve the public interest increased significantly.</p> <p>Automotive: Nissan, Volkswagen, and Volvo made the largest gains, but other firms did well too.</p>	<p>Telecommunications: Bell, Telus, and Ericson all fell a great deal; Cisco did poorly as well.</p> <p>Consumer electronics: RIM plummeted, obviously, but Nokia and HP lost ground as well, and while MSFT held onto #2 spot, it lost mindshare*. Exception: Sony did very well, climbing five ranks to #16.</p>

*Mindshare is defined as the percentage of students selecting the employer as one of their five ideal employers.

Most engineering sectors showed no clear trend in rankings – students evaluated individual companies, rather than the industry

Changes in Attractiveness for Energy & Mining Sector Firms

Canadian Engineering Undergraduates, 2014 vs. 2013



An abstract graphic on the left side of the page, composed of several overlapping, semi-transparent orange and red polygons. The shapes create a sense of depth and movement, with some areas appearing brighter due to the layering.

Appendix

Universum Canada Student Survey
Methodology

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The Universum Student Survey offers a unique view into attitudes toward employers and career paths

- **Survey fielded between mid-October 2013 and late February 2014**
 - Survey was conducted online
 - Respondents were invited to take survey by their campus career office and/or student organizations to which they belong
 - 92% of respondents attended one of the 107 Canadian universities with which Universum has an active relationship. The remainder of responses came from other institutions, via national student organizations we work with.
- Data are based exclusively on students who completed core survey questions – respondents who didn't give us their academic major and certain other educational profile aspects, or who didn't complete the ideal employer selection exercise, are not included in the reporting on other questions.
- Ideal employer rankings are based on the following exercise:
 - Respondents presented with list of 140 employers who recruit students in Canada.
 - Respondents may choose as many employers as they like as ones they're "considering." (They have the option to write in employers that are not included on the list of 140.)
 - Respondents then asked to narrow down their list of considered employers to at most five that they consider "ideal."
- To ensure that over/under representation in the sample by one university's program does not skew the results, **responses were weighted** by school and main field of study.

Respondent counts:

- Business = 9,125
- Engineering & IT = 4,526
- Natural Sciences = 4,234
- Liberal Arts, Fine Arts, Education, and Social Sciences = 8,113
- Law = 441
- Health & Medicine = 2,611
- All undergraduates = 29,050

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