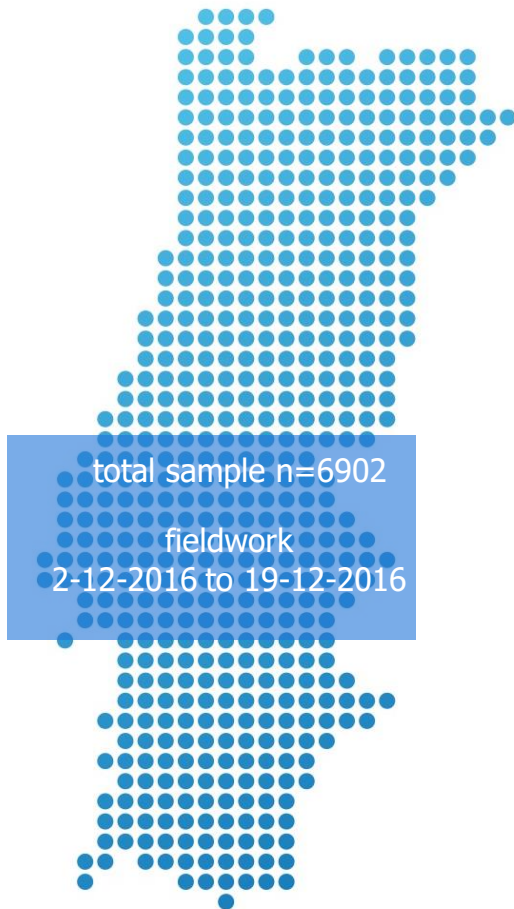




Employer Brand
Research 2017
powered by  randstad

country report
Portugal

sample composition



Gender

Male: 47%
Female: 53%



Age

18-24 y.o. 14%
25-44 y.o. 58%
45-64 y.o. 28%



Work situation

Working	64%
Self-employed/ freelance	11%
Seeking/ unemployed	12%
Housewife/househusband	2%
Student	8%

Education

Low 8%
Middle 39%
High 53%



Region

Norte: 32%
Centro: 19%
Lisboa e

Vale do Tejo: 39%

Alentejo: 4%

Algarve: 4%

Açores: 1%

Madeira: 2%



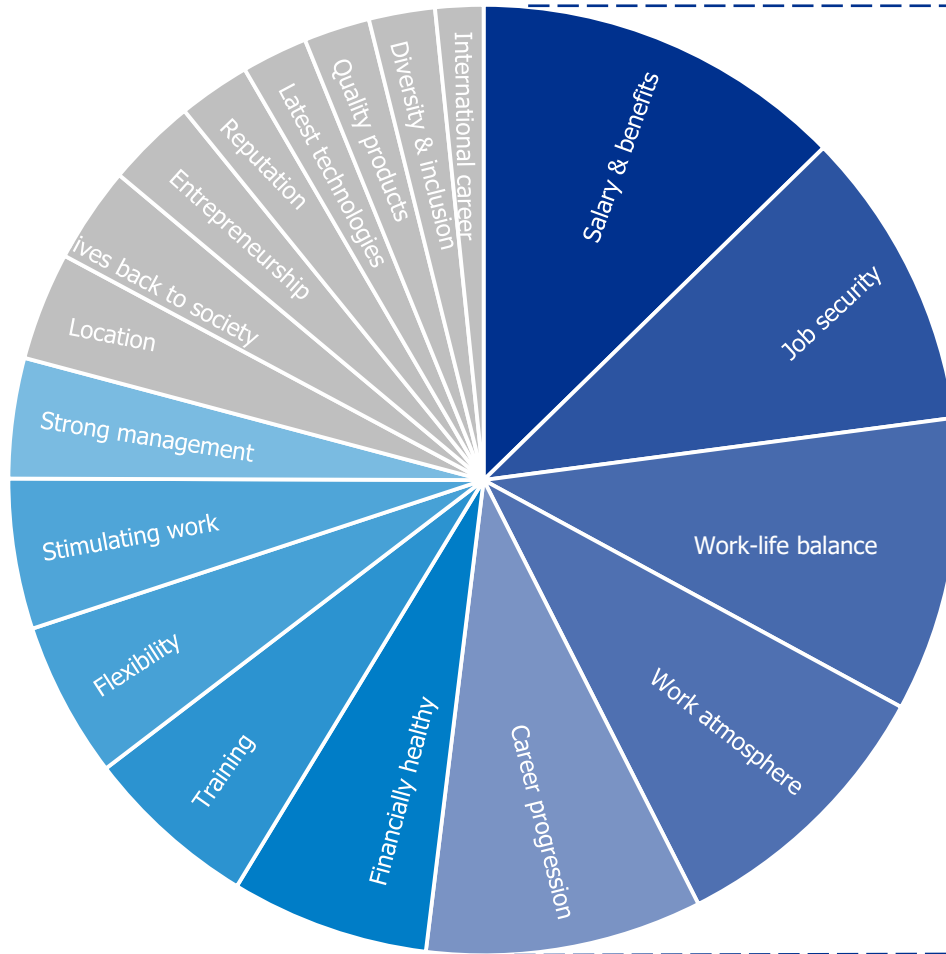


Portugal results

what do
Portuguese
workers want?

top employer traits

how does the ideal employer look like in Portugal?



The ideal employer is a mix of the traits presented in the box to the left. Characteristics falling within the blue arrows are highest rated by the portuguese labour force.

Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.

A breakdown on gender, age and education level of the top 3 drivers is available in Annex 4.

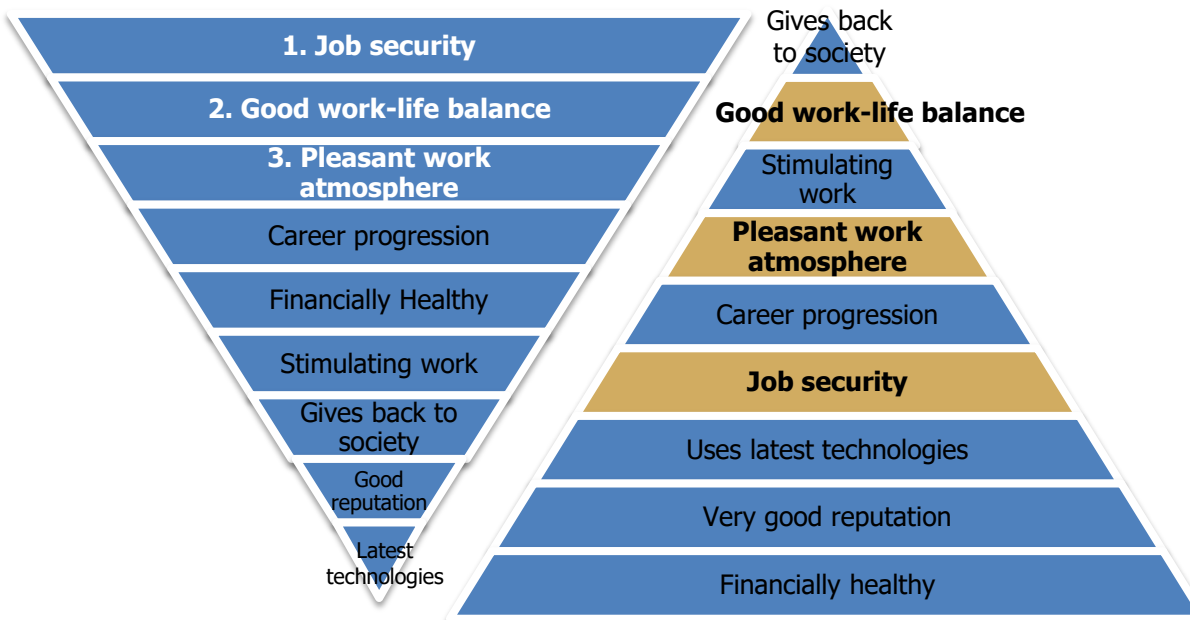
expectations vs. perception about employers

what are the 3 most obvious gaps?

A **gap** between what employees seek and what employers offer
= **opportunity** for employers' EVP

Employees in Portugal seek

Employers in Portugal offer



Gap #1 - Job security

Employees are looking for an employer that provides them with long-term job security. Whilst this is a highly desired element, there are other elements on which employers are rated better.

Gap #2 - Work-life balance

Employees are attracted by companies that encourage employee work-life balance. Companies overall fail to deliver on this aspect.

Gap #3 - Pleasant work atmosphere

Employees indicate they are looking for a pleasant working environment in an ideal employer. This item is rated as highly important, yet companies fall short of delivering it.

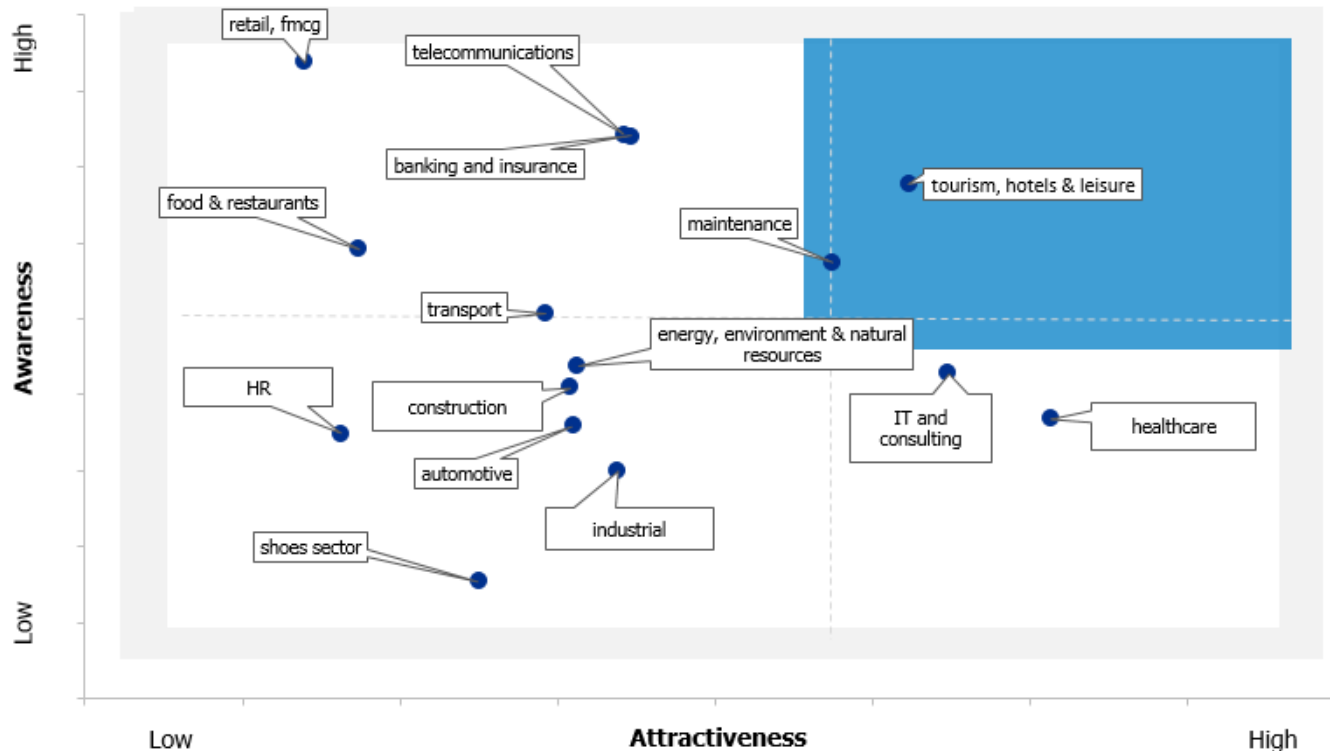


Randstad Employer Brand Research

most attractive
sectors

top performing sectors

what are the best known and most attractive sectors?



A sector with **high attractiveness** contains more highly attractive companies than other sectors.

Having a **high awareness** means that employers in the sector are widely known.

top performing sectors

what are the best known and most attractive sectors?

results 2017

1. healthcare
56%

2. IT and consulting
52%

3. tourism, hotels & leisure
51%

Retail is the sector with the highest awareness but with the lowest attractiveness (32%)

results 2016

1. IT and consulting
51%

2. healthcare
49%

3. tourism, hotels & leisure
48%

Maintenance is the sector with low awareness and with the lowest attractiveness (16%)

most important EVP drivers per sector

what are the 3 best ranking attributes per sector?

Sector attractiveness ↓

Sector	1	2	3
1. healthcare	Uses latest technologies	Financially healthy	Very good reputation
2. IT and consulting	Uses latest technologies	Financially healthy	Very good reputation
3. tourism, hotels & leisure	Financially healthy	Very good reputation	Uses latest technologies
4. maintenance	Financially healthy	Uses latest technologies	Very good reputation
5. banking and insurance	Financially healthy	Uses latest technologies	Very good reputation
6. telecommunications	Financially healthy	Uses latest technologies	Very good reputation
7. industrial	Financially healthy	Uses latest technologies	Very good reputation
8. energy, environment & natural resources	Financially healthy	Uses latest technologies	Very good reputation
9. automotive	Financially healthy	Uses latest technologies	Very good reputation
10. construction	Uses latest technologies	Financially healthy	Very good reputation
11. transport	Uses latest technologies	Financially healthy	Very good reputation

most important EVP drivers per sector

what are the 3 best ranking attributes per sector?

Sector attractiveness ↓	sector	1	2	3
	12. shoes sector	Financially healthy	Very good reputation	Uses latest technologies
	13. food & restaurants	Financially healthy	Very good reputation	Uses latest technologies
	14. HR	Financially healthy	Uses latest technologies	Very good reputation
	15. retail, fmcg	Financially healthy	Very good reputation	Uses latest technologies

sector performance on most important EVP drivers

which sectors score highest on EVP drivers and which lowest?

EVP drivers	highest	average	lowest
Job security	healthcare	transport	HR
Good work-life balance	healthcare	energy, environment & natural resources	retail, fmcg
Pleasant work atmosphere	healthcare	energy, environment & natural resources	retail, fmcg
Career progression	IT and consulting	banking and insurance	retail, fmcg
Financially healthy	healthcare	food & restaurants	construction
Stimulating work	healthcare	transport	retail, fmcg
Gives back to society	healthcare	food & restaurants	transport
Very good reputation	healthcare	telecommunications	HR
Uses latest technologies	healthcare	shoes sector	retail, fmcg

Randstad Employer Brand Award

most attractive
employers



top employers in Portugal

who are the top 10 most attractive employers in Portugal?

results 2017

1.

Microsoft

2.

Delta Cafés

3.

TAP Portugal

4. Nestlé
5. The Navigator Company
6. RTP – Rádio e Televisão de Portugal
7. Hovione Farmaciência
8. ANA – Aeroportos de Portugal
9. Siemens
10. OGMA – Indústria aeronáutica de Portugal
11. Nokia
12. Bosch Termotecnologia
13. Banco de Portugal
14. Volkswagen autoeuropa
15. Pestana Hotel Group
16. Fujitsu Technology Solutions
17. CTT
18. EDP – Energia
19. Hospital da Luz
20. Sumol+Compal

results 2016

1.

TAP Portugal

2.

Delta Cafés

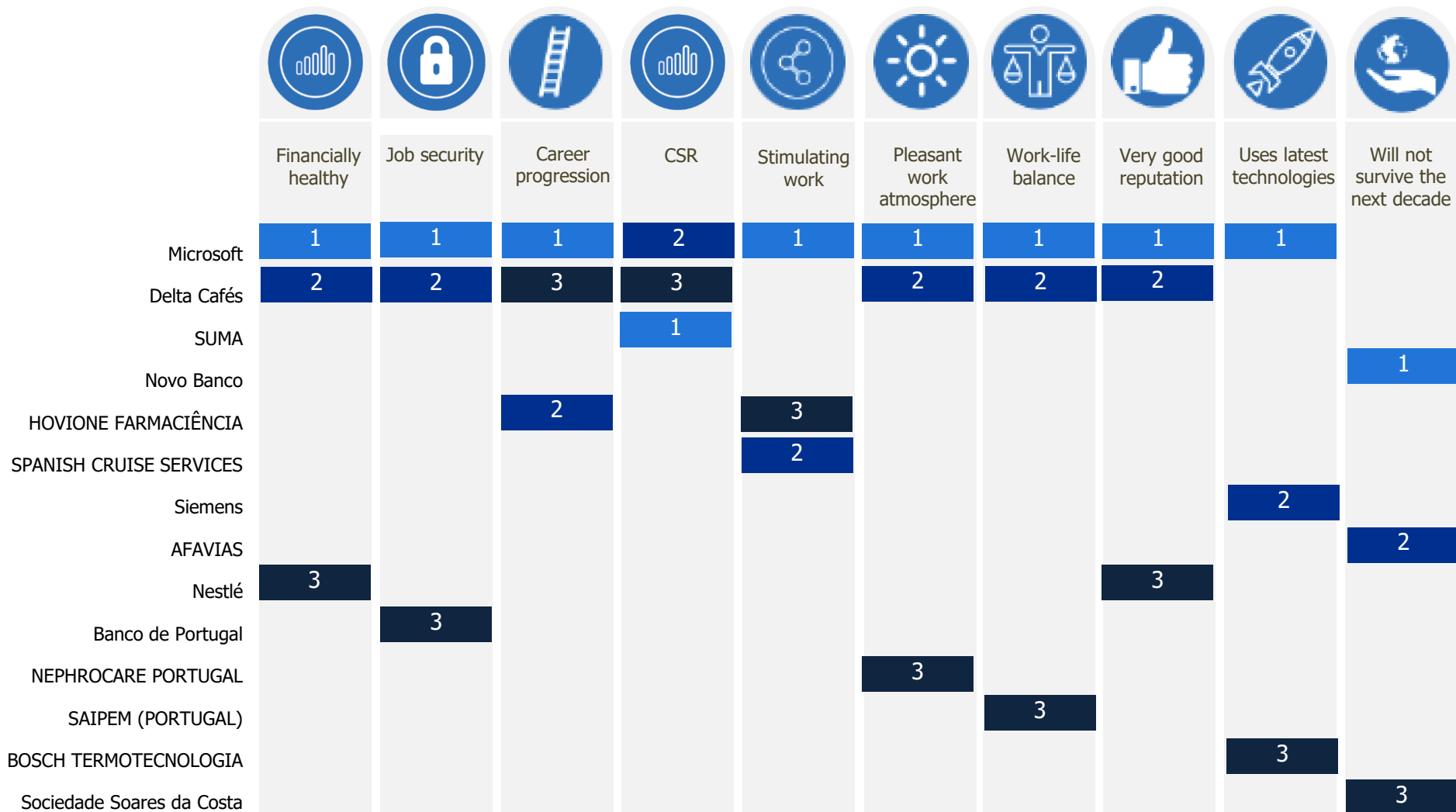
3.

Nestlé

4. ANA Aeroportos
5. EDP – energia
6. RTP – Rádio e Televisão de Portugal
7. Petróleos de Portugal
8. Vila Galé
9. SATA air Açores
10. Hospital da Luz
11. Fnac Portugal
12. Imprensa Nacional
13. Siemens
14. CTT
15. Novabase business solutions
16. Volkswagen autoeuropa
17. Sumol+Compal
18. Viagens Abreu
19. Efacec
20. Sonae Center Serviços II

top 150 employers by most important EVP

which are the top 3 employers on the EVP drivers?



*Please note that above ranking reflects top employers qualifying for the Randstad Employer Brand Award.

A person with long brown hair is seen from behind, looking at a futuristic digital interface. The interface features various data visualizations, including bar charts, line graphs, and network diagrams with glowing nodes and connections. The background is a dark, starry space with a glowing blue nebula. The overall aesthetic is high-tech and digital.

additional
insights

automation and
retraining

employee attitudes towards automation and retraining

what do employees in Portugal think about automation?



I think automation will make my job better

45%

Male	46%
Female	45%

18-24 y.o.	49%
25-44 y.o.	45%
45-65 y.o.	44%

Lower level	34%
Middle	43%
Higher	48%

I worry that automation will take my job away

12%

Male	13%
Female	12%

18-24 y.o.	15%
25-44 y.o.	12%
45-65 y.o.	12%

Lower level	21%
Middle	14%
Higher	9%



I would be happy to re-train if I was being paid the same or more than my current salary

55%

Male	57%
Female	54%

18-24 y.o.	46%
25-44 y.o.	55%
45-65 y.o.	58%

Lower level	51%
Middle	56%
Higher	55%

I would rather move to another company than re-train

5%

Male	5%
Female	4%

18-24 y.o.	9%
25-44 y.o.	5%
45-65 y.o.	3%

Lower level	7%
Middle	5%
Higher	4%

A close-up photograph of a person's hand holding a small, rectangular electronic component with gold-colored pins. The hand is positioned over a green printed circuit board (PCB) which has various electronic components and a ribbon cable attached. The background is blurred, showing more of the circuit board and some other components. The lighting is warm and focused on the hand and the component being held.

additional
insights

scarce profiles:
engineering and IT

scarce profiles in the spotlight

engineering and IT profiles compared to the general population

3 most used channels to check reputation



	all profiles	engineering profiles	IT profiles
opinions of friends and family	1	1	1
company website	2	2	2
job boards	3		
general online articles		3	
Linkedin			3

employer brand over job content?



	all profiles	engineering profiles	IT profiles
brand	13%	10%	13%
job content	87%	90%	87%

scarce profiles in the spotlight

engineering and IT profiles compared to the general population

what do they look for in the ideal employer



	All profiles	Engineering profiles	IT profiles
Attractive salary and benefits	1	1	1
Job security	2	5	4
Good work life balance	3	2	2
Pleasant work atmosphere	4	4	5
Career progression	5	3	3

whom would they rather work for



	All profiles	Engineering profiles	IT profiles
Would rather have my own business	1	2	2
Large (multinational) corporation	2	1	1
Small to midsize business	3	3	3

scarce profiles in the spotlight

engineering and IT profiles compared to the general population

would they switch the sector they work in

	Engineering profiles	All profiles	IT profiles
Yes			
I am not that attached to my sector	22%	24%	18%
Only if I could not find a job in my sector anymore	27%	19%	23%
Only if the pay and benefits are at least similar to what I get now	33%	37%	38%
No			
My skills are not transferable to other sectors	9%	10%	11%
I have other reasons for wanting to stay in this sector	14%	17%	19%
	N=435	N=5200	N=536

automation will

	Make my job better	Take my job away	Have no effect on my job
Engineering profiles	57%	8%	33%
All profiles	45%	12%	39%
IT profiles	53%	10%	35%

i would retrain

	If paid the same	Rather switch company	Cannot imagine automation will take my job away
Engineering profiles	55%	3%	40%
All profiles	55%	4%	37%
IT profiles	59%	5%	34%

The background of the slide is a blurred financial candlestick chart. The chart features green and red candlesticks representing price movements over time, with several white moving average lines overlaid. A large, semi-transparent blue rectangle is positioned on the left side of the image, partially obscuring the chart.

appendix

appendix 1 - key EVP driver 1: job security*

do ideal employers differ with employees' socio-demographic background?

Male

1. Microsoft
2. Banco de Portugal
3. Delta Cafés

Female

1. Microsoft
2. SAIPEM (PORTUGAL) - COMÉRCIO MARÍTIMO
3. Delta Cafés

18-24 y.o.

1. Microsoft
2. OGMA - INDÚSTRIA AERONÁUTICA DE PORTUGAL
3. Aquinos

25-44 y.o.

1. Microsoft
2. Delta Cafés
3. NEPHROCARE PORTUGAL

45-65 y.o.

1. Microsoft
2. Banco de Portugal
3. Delta Cafés

Low

1. HOVIONE FARMACIÊNCIA
2. Microsoft
3. Banco de Portugal

Middle

1. Microsoft
2. Delta Cafés
3. Nestlé

High

1. Microsoft
2. Delta Cafés
3. SAIPEM (PORTUGAL)

*Please note that above ranking reflects top employers qualifying for the Randstad award.

appendix 2 - key EVP driver 2: good work-life balance*

do ideal employers differ with employees' socio-demographic background?

Male
1. Microsoft
2. LANKHORST EURONETE PORTUGAL
3. Delta Cafés

Female
1. SAIPEM (PORTUGAL)
2. Microsoft
3. Delta Cafés

18-24 y.o.
1. FICO cables
2. Aquinos
3. SAIPEM (PORTUGAL)

25-44 y.o.
1. Delta Cafés
2. Microsoft
3. NEPHROCARE PORTUGAL

45-65 y.o.
1. Microsoft
2. Delta Cafés
3. COINDU - COMPONENTES PARA A INDÚSTRIA AUTOMÓVEL

Low
1. HOVIONE FARMACIÊNCIA
2. NEPHROCARE PORTUGAL
3. DOCTRANS - TRANSPORTES RODOVIÁRIOS DE MERCADORIAS

Middle
1. Microsoft
2. Delta Cafés
3. SAIPEM (PORTUGAL)

High
1. Microsoft
2. LANKHORST EURONETE PORTUGAL
3. SAIPEM (PORTUGAL)

*Please note that above ranking reflects top employers qualifying for the Randstad award.

appendix 3 - key EVP driver 3: work atmosphere*

do ideal employers differ with employees' socio-demographic background?

Male	Female
1. Microsoft	1. Microsoft
2. Delta Cafés	2. Delta Cafés
3. LANKHORST EURONETE PORTUGAL	3. NEPHROCARE PORTUGAL

18-24 y.o.	25-44 y.o.	45-65 y.o.
1. SPANISH CRUISE SERVICES N.V.	1. Microsoft	1. Microsoft
2. Microsoft	2. Delta Cafés	2. Delta Cafés
3. RIOPELE - TÊXTEIS	3. LANKHORST EURONETE PORTUGAL	3. THE NAVIGATOR COMPANY

Low	Middle	High
1. NEPHROCARE PORTUGAL	1. Microsoft	1. Microsoft
2. Microsoft	2. Delta Cafés	2. Delta Cafés
3. ANA - AEROPORTOS DE PORTUGAL	3. Nestlé	3. NEPHROCARE PORTUGAL

*Please note that above ranking reflects top employers qualifying for the Randstad award.

appendix 4 - EVP driver importance*

do EVP drivers differ with employees' socio-demographic background?

Male

1. provides attractive salary and benefits
2. offers long-term job security
3. offers career progression opportunities

Female

1. provides attractive salary and benefits
2. good work-life balance
3. offers long-term job security

18-24 y.o.

1. provides attractive salary and benefits
2. fosters a pleasant work atmosphere
3. good work-life balance

25-44 y.o.

1. provides attractive salary and benefits
2. offers long-term job security
3. good work-life balance

45-65 y.o.

1. provides attractive salary and benefits
2. offers long-term job security
3. good work-life balance

Low

1. provides attractive salary and benefits
2. offers long-term job security
3. fosters a pleasant work atmosphere

Middle

1. provides attractive salary and benefits
2. offers long-term job security
3. fosters a pleasant work atmosphere

High

1. provides attractive salary and benefits
2. good work-life balance
3. offers career progression opportunities

appendix 5 - survey design

Target group*	Sample aged 18 to 65, representative on gender with an overrepresentation on age group: 25 – 44
Sample composition	Sample comprised of students, employed and unemployed workforce
Sample size	Total sample n= 6902
Fieldwork period	Interviews conducted between 2 December 2016 and 19 December 2016
Fieldwork method	An online questionnaire (CAWI), respondents were invited via e-mail
Questionnaire length	An average of 17 minutes
Types of questionnaire	One standard questionnaire, with routing
Types of reporting	Company reports, country reports, global reports and global sector reports

*More detailed information is available upon request