

employer  
brand research  
2019



country report  
portugal.

# contents.

- 1 introduction
- 2 country results
- 3 sector insights
- 4 top employers
- 5 deep dive
- 6 methodology



# introduction.



# why employer branding matters.



Companies with positive brands get twice as many applications as companies with negative brands, and they spend less money on employees.<sup>1</sup>

50%

of candidates say they wouldn't work for a company with a bad reputation – even with a pay increase.<sup>1</sup>

96%

agree that alignment of personal values with a company's culture is a key factor in their satisfaction working there.<sup>3</sup>

80%

of workforce leaders agree that a strong employer brand has a significant impact on their ability to hire great workforce.<sup>2</sup> 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.

70%

Organizations that invest in strong candidate experience improve quality of hire by 70%.<sup>8</sup>

62%

of candidates research companies on social media before applying.<sup>5</sup>



Companies with bad reputations pay 10% more per hire.<sup>4</sup>

67%

Companies with a formal employee engagement strategy in place are 67% more likely to improve their revenue per full-time equivalent on a year-over-year basis.<sup>6</sup>

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.<sup>7</sup>

# the employer brand roadmap.



# what is the randstad employer brand research?

- **representative employer brand research** based on perceptions of the general audience. Optimizing 19 years of successful employer branding insights.
- **independent survey** with over 200,000 respondents in 32 countries worldwide.
- **reflection of employer attractiveness** for the country's 150 largest employers known by at least 10% of the population.
- **valuable insights** to help employers shape their employer brand.



# 32 countries surveyed covering more than 75% of the global economy.

Austria  
Australia  
Argentina  
Belgium  
Brazil  
Canada  
China  
Czech Republic  
France  
Germany  
Greece  
Hong Kong  
Hungary  
Italy  
India  
Japan  
Luxembourg  
Malaysia  
New Zealand  
Netherlands  
Norway  
Poland  
Portugal  
Romania  
Russia  
Singapore  
Spain  
Sweden  
Switzerland  
UK  
Ukraine  
USA



● countries surveyed

## worldwide

- over 200,000 respondents
- 6,162 companies surveyed

## sample

- aged 18 to 65
- representative on gender
- overrepresentation of age 25 – 44
- comprised of students, employed and unemployed workforce

## country

- 5,125 respondents

## fieldwork

- online interviews
- between 21 december 2018 and 4 january 2019

## length of interview

- 16 minutes



# 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.

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## drivers

each company is evaluated on:

- 01 financially healthy
  - 02 uses latest technology
  - 03 very good reputation
  - 04 job security
  - 05 career progression
  - 06 gives back to society
  - 07 interesting job content
  - 08 pleasant work atmosphere
  - 09 work-life balance
  - 10 attractive salary & benefits
- 



## KANTAR TNS

For this research, Randstad partners with Kantar TNS, one of the world's largest insight, information and consultancy networks.





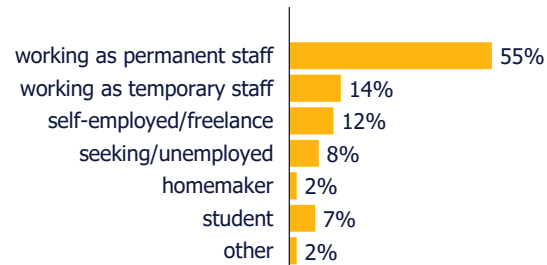
# sample composition in portugal

## socio-demographics, employment situation, region.

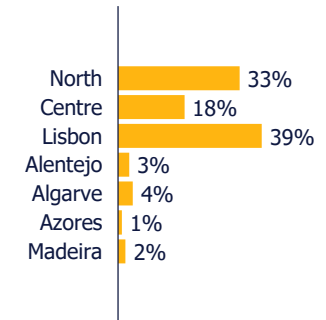
### gender



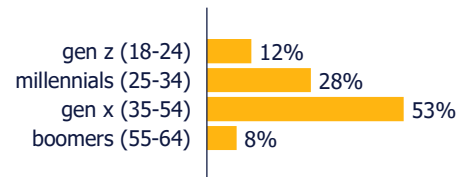
### situation



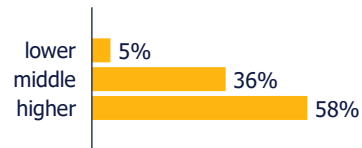
### region



### age



### education

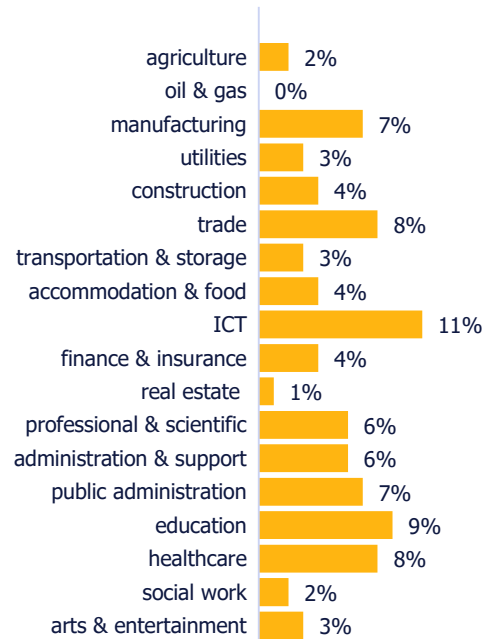


total sample: 5,125  
fieldwork: 21 december 2018 and 4 january 2019

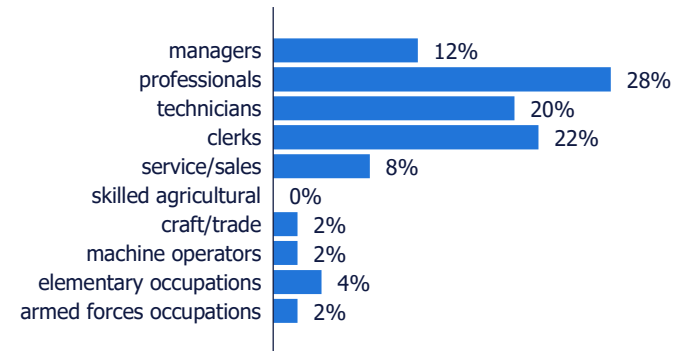


# sample composition in portugal

## sector



## function

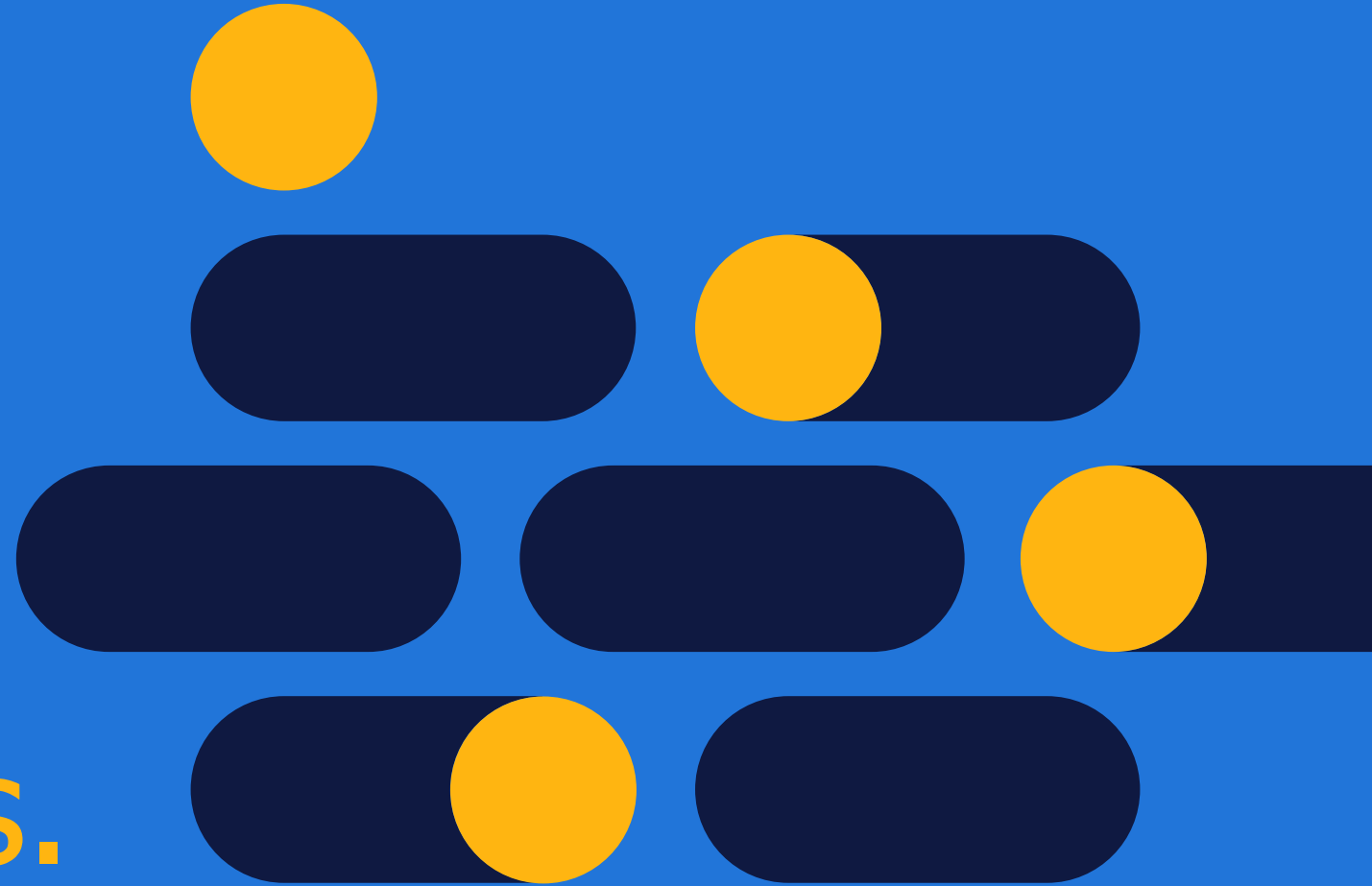


base: currently employed (n=4,156)



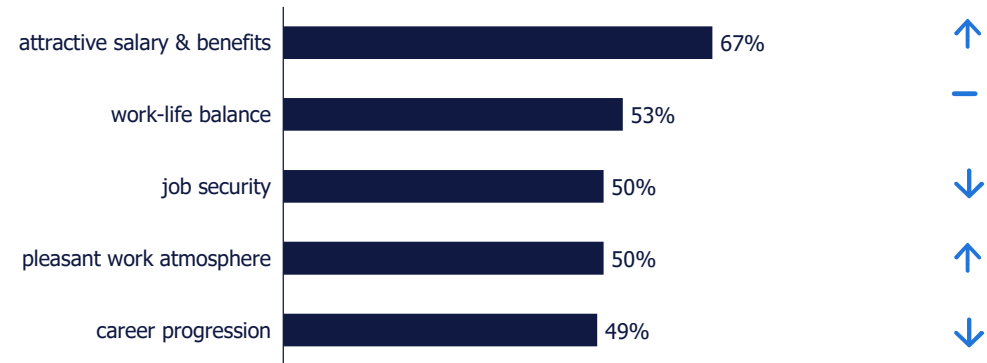
country

EVP drivers.



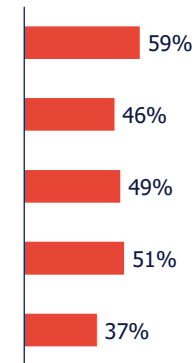
# what potential employees want when choosing an employer.

## most important criteria

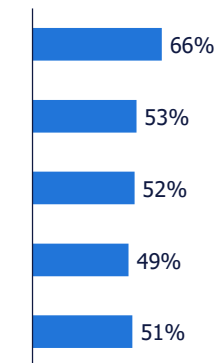


## versus 2018

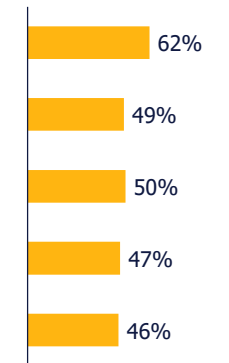
## europa



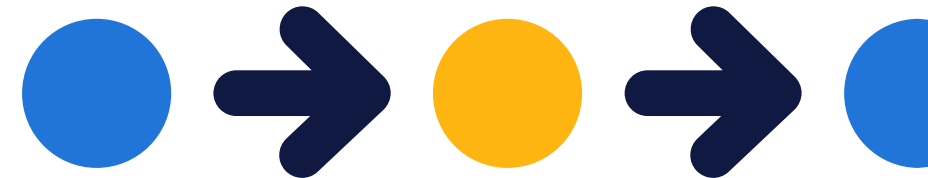
## 2018



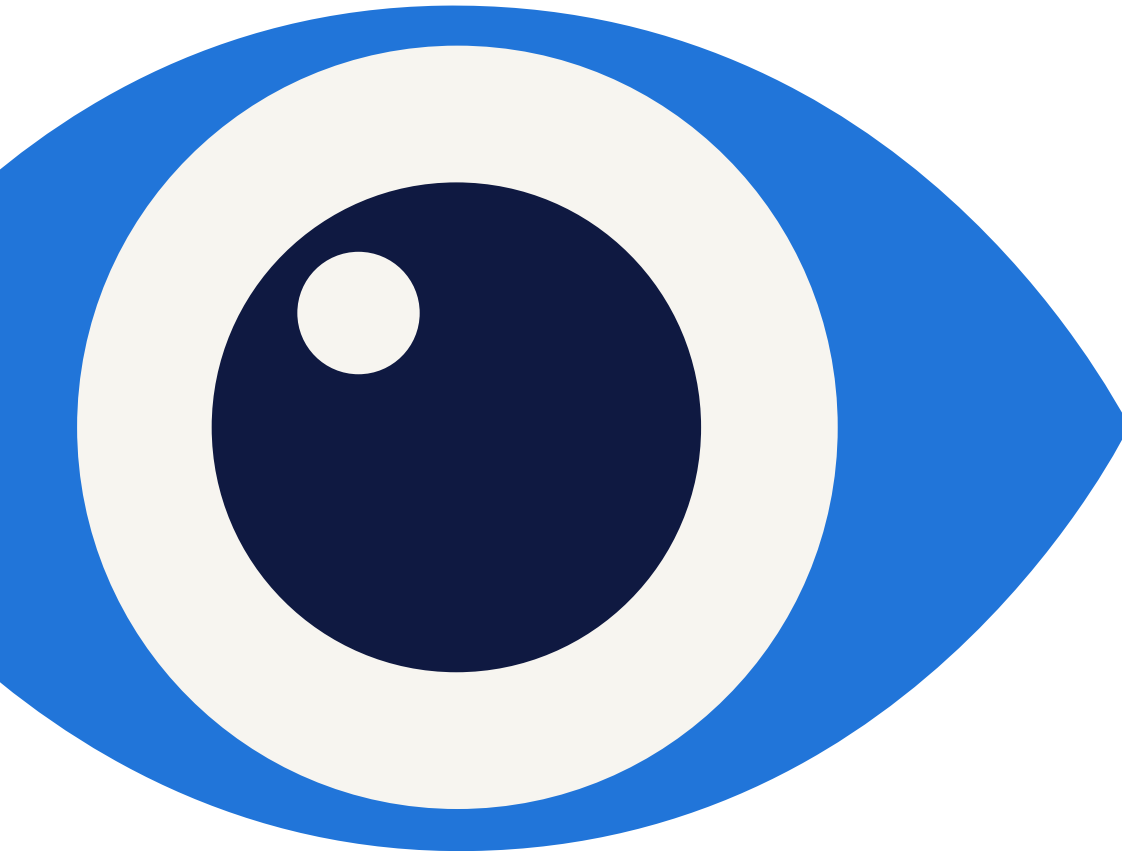
## 2017



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



# perception of employer offer in portugal and the region.



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

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## employers in portugal are perceived to offer.

- 1 financially healthy
- 2 very good reputation
- 3 uses latest technology
- 4 job security
- 5 career progression
- 6 pleasant work atmosphere
- 7 interesting job content
- 8 attractive salary & benefits
- 9 work-life balance
- 10 gives back to society

---

## employers in europe are perceived to offer.

- 1 financially healthy
  - 2 uses latest technologies
  - 3 very good reputation
  - 4 job security
  - 5 career progression
  - 6 interesting job content
  - 7 attractive salary & benefits
  - 8 pleasant work atmosphere
  - 9 work-life balance
  - 10 gives back to society
-

# gap between what (potential) employees seek and what employees perceive employers to offer in portugal.

Employers in a country may not always be perceived to be offering what (potential) employees are looking for. Below you see the 3 main attributes employees look for but which they believe employers do not sufficiently offer.

---

## gap top 3

- 1 attractive salary & benefits
  - 2 work-life balance
  - 3 job security
- 



# what do potential employees want by generational profile.

gen z (18-24)

## 29%

of the gen z's are looking for interesting job content in their employer. This is higher when compared to millennials and gen x.

gen x (35-54)

## 25%

of the gen x's find location a very important pull factor towards an employer. For gen z and millennials, this factor is less important.

millennials (25-34)

## 55%

of the millennials seek work-life balance. Gen z and boomers are less interested in this offering from their employer.

boomers (55-64)

## 46%

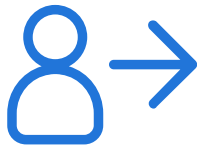
of the boomers are attracted to companies that are financially healthy. This is less so among the other cohorts.



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



# important attributes by type of contract.



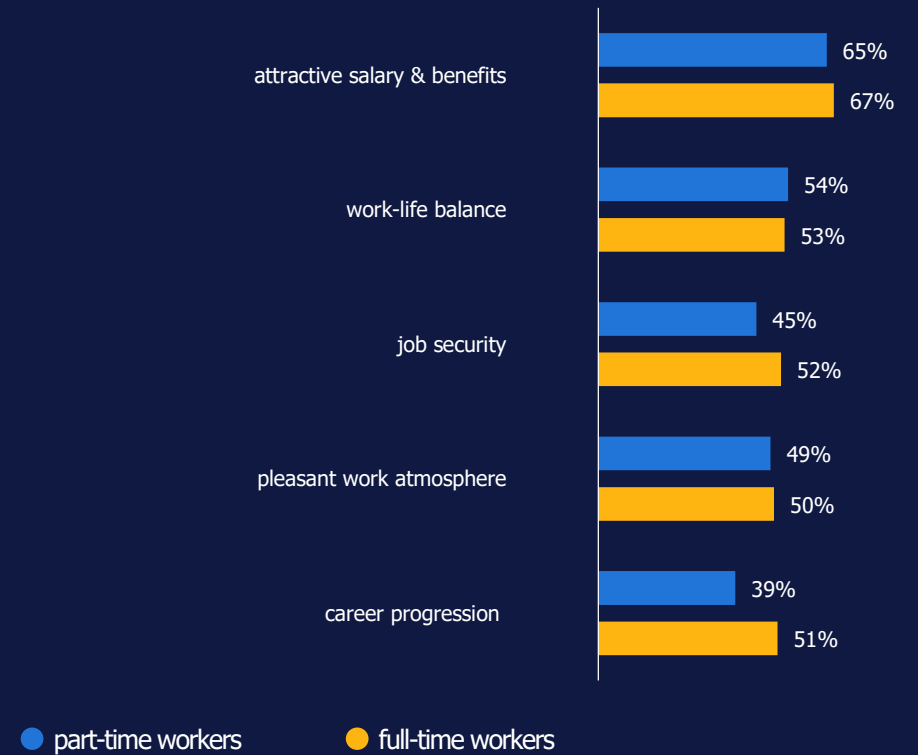
6%

of today's workforce  
works part-time.

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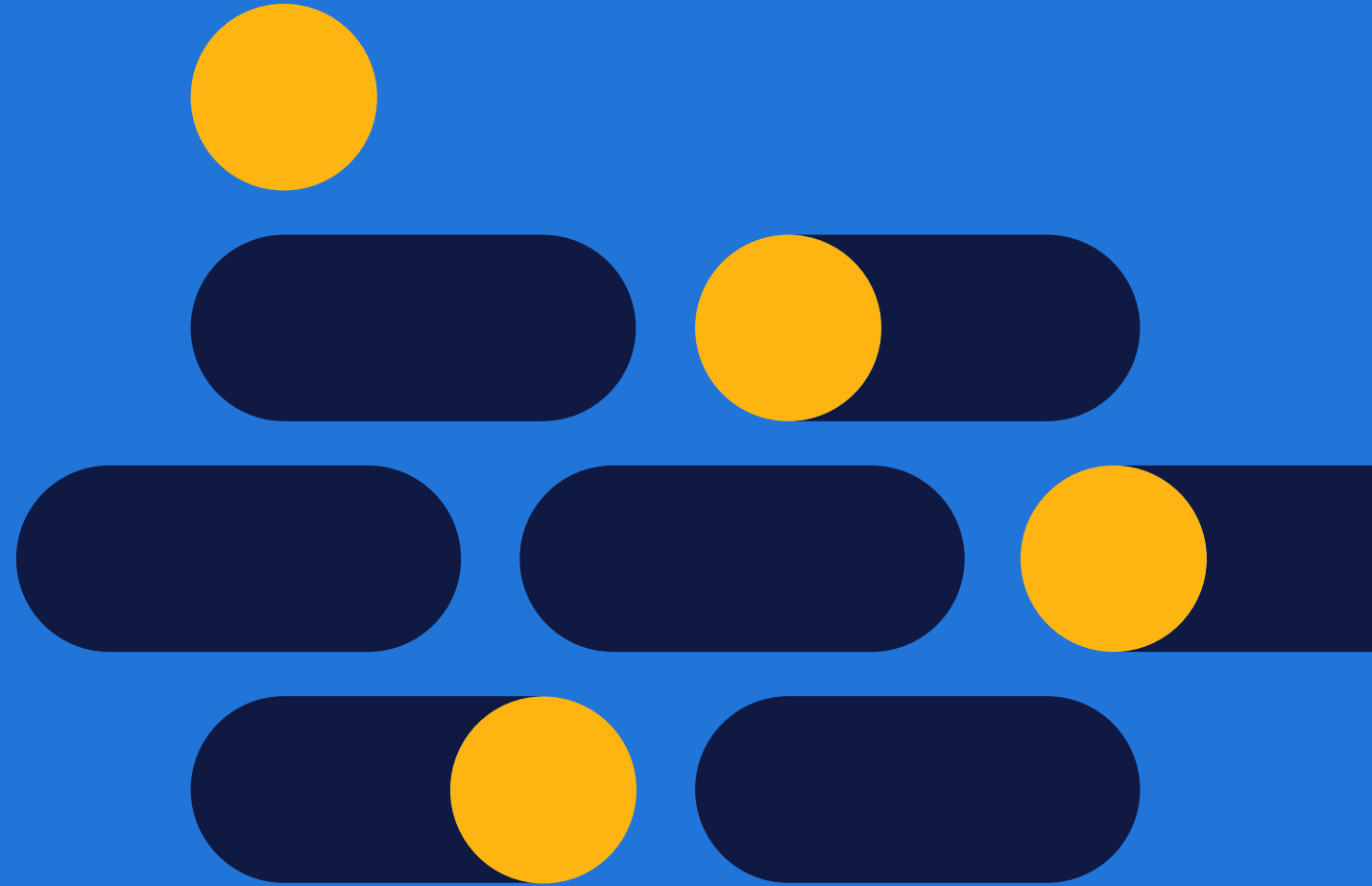
## most important attributes





# switchers and stayers

in focus.



# changing employer portugal vs europe.

**switchers:** changed employer in the past year.



**stayers:** stayed with their employer in the past year.



**intenders:** plan to change employer within the next year.

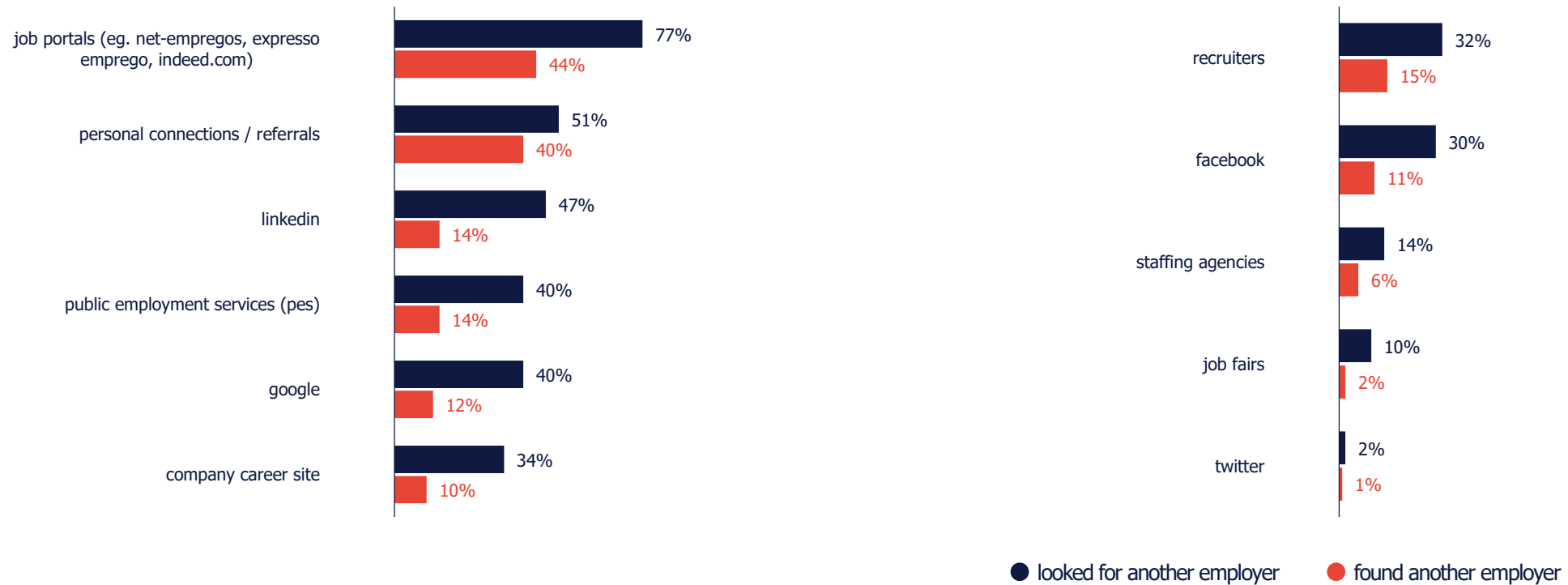


\* in the past 12 months

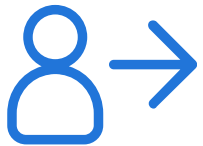


# how do the portuguese workers look for and find employers.

## channels used to look for and find employers



# most important attributes switchers vs stayers.



20% (15%)\*

switchers: changed employer in the past year.



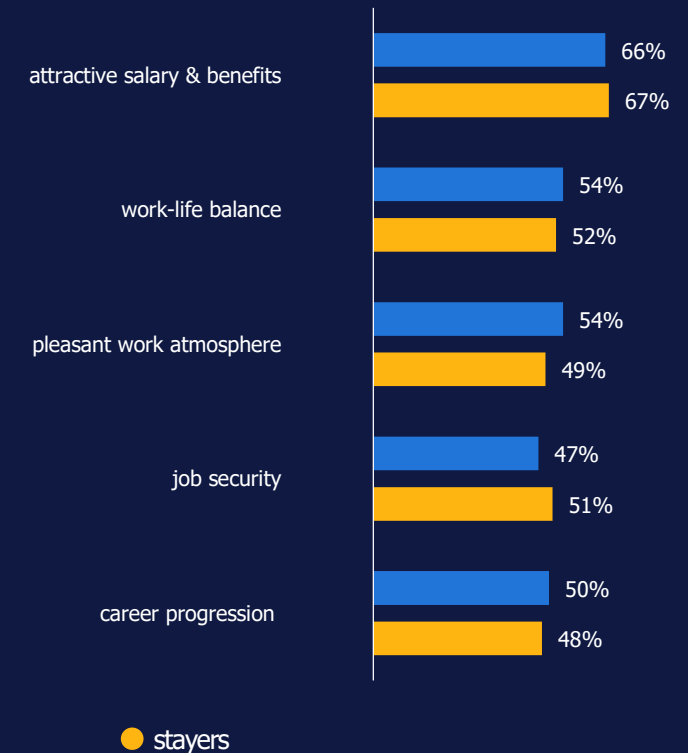
80% (85%)\*

stayers: stayed with their employer in the past year.

\*in 2018



## most important attributes



# most important attributes intenders.



31% (27%)\*

intenders: plan to  
change employer  
within the next year.

\*in 2018

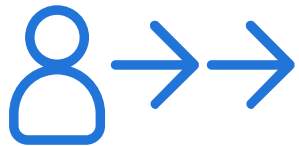


## most important attributes



● intenders

# channels to look for employers intenders.



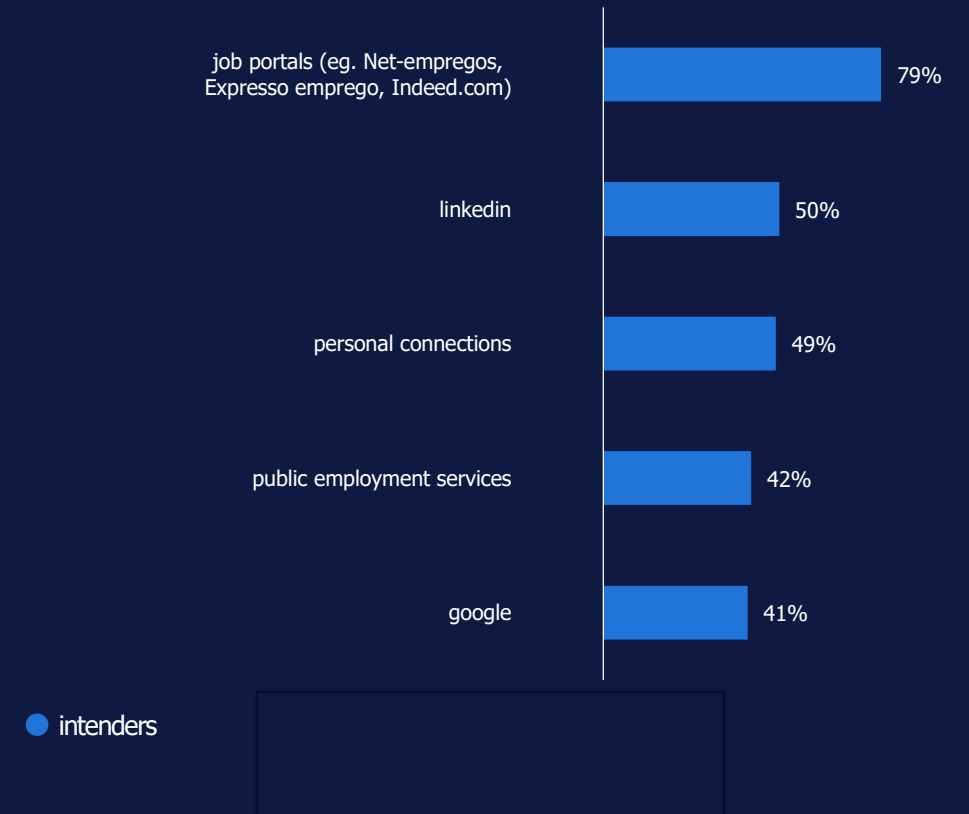
**44%** (43%)\*  
of last year's switchers\*\*  
intend to switch again  
next year.

\*\* n=1.023 switched last year

\*in 2018



## channels to look for employers

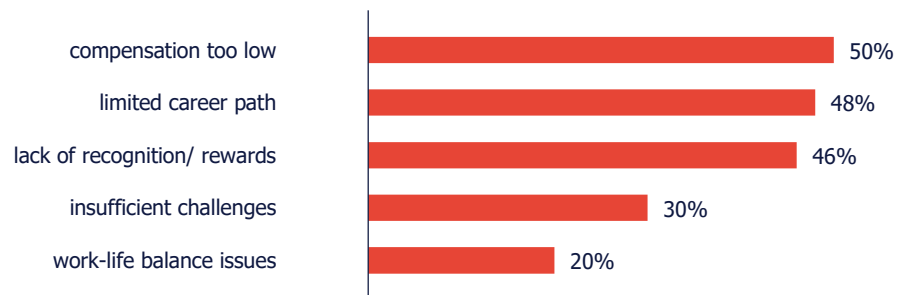


# why do the portuguese stay or leave.

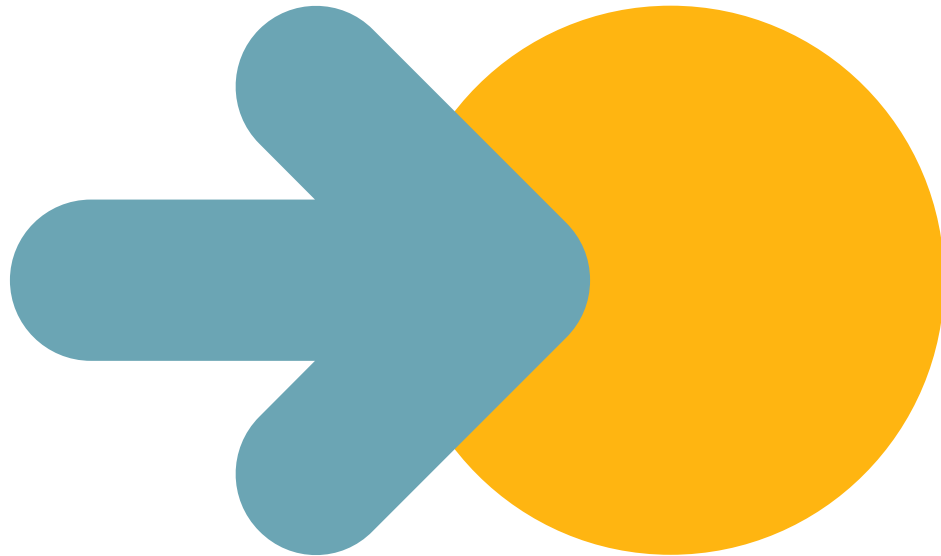
## main reasons to stay



## main reasons to leave



# what factors do the portuguese stay for reasons to stay, by profile.



---

gen z (18-24)

35%

of the gen z's are staying with their employer for good training. This is higher when compared to older workforce.

---

gen x (35-54)

48%

of the gen x's stay with their employer for job security. For younger generations, this factor is deemed less important.

---

millennials (25-34)

43%

of the millennials stay if there is a pleasant work atmosphere. Gen z and gen x are less interested in this offering from their employer.

---

boomers (55-64)

41%

of the boomers are more likely to stay when the employer has a convenient location. This is higher than among gen z's.

---

[click here](#) for a breakdown of all results.



# what factors do the portuguese leave for reasons to leave, by profile.

gen z (18-24)

27%

of the gen z's are leaving their employer if they perceive work-life balance issues. This is higher when compared to older workforce.

gen x (35-54)

52%

of the gen x's leave their employer because of a limited career path. Among other generations, this factor is deemed less important.

millennials (25-34)

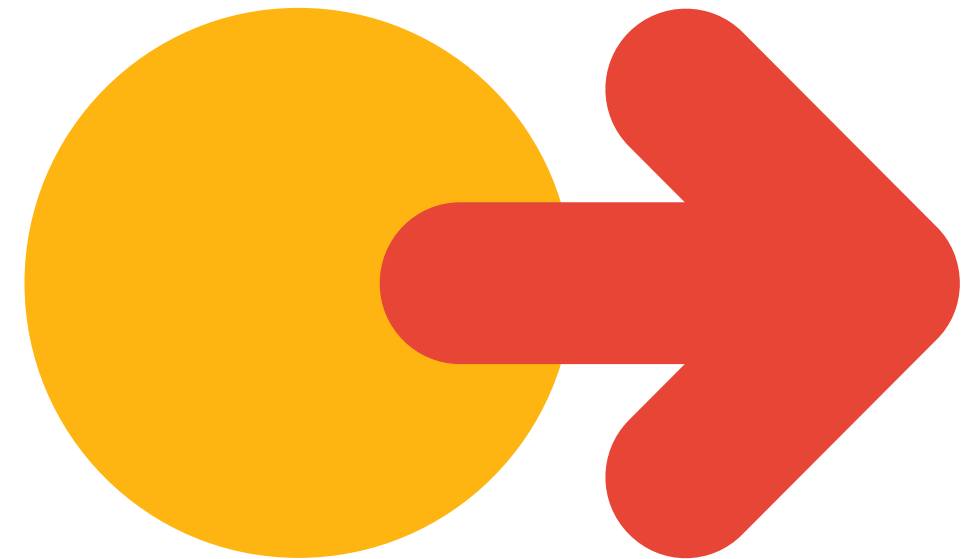
52%

of the millennials leave if they think their compensation is too low. Gen z is less interested in this offering from their employer.

boomers (55-64)

24%

of the boomers leave their employer because the organization shows poor leadership. This is less so for gen z and millennials.

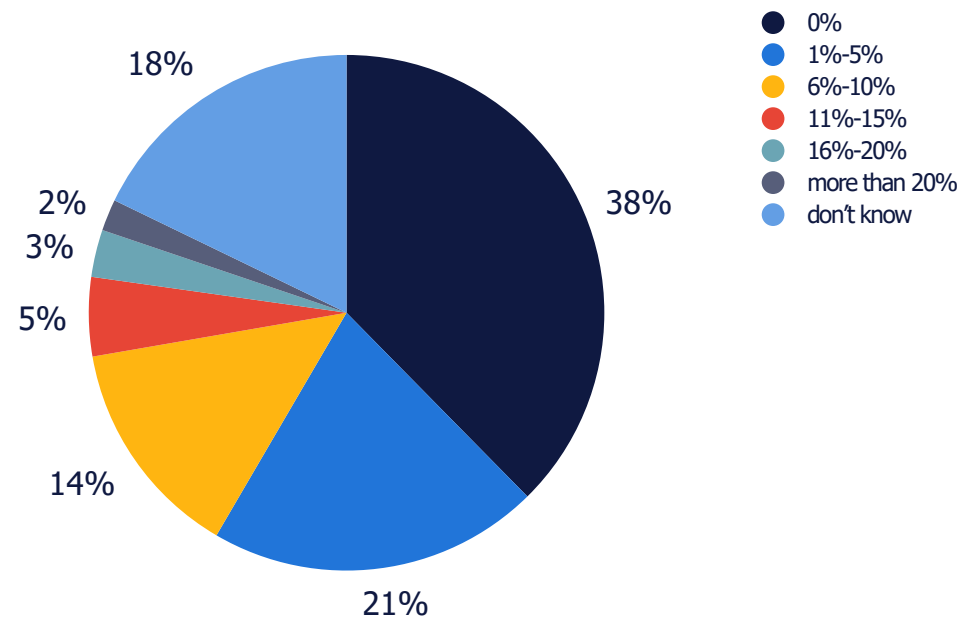


[click here](#) for a breakdown of all results.



# willingness to forfeit salary for more work security.

amount of salary employees are willing to forfeit



portugal

10%

is willing to forfeit more than 10% of their salary in this exchange

europe

16%

is willing to forfeit more than 10% of their salary in this exchange



ideal employer

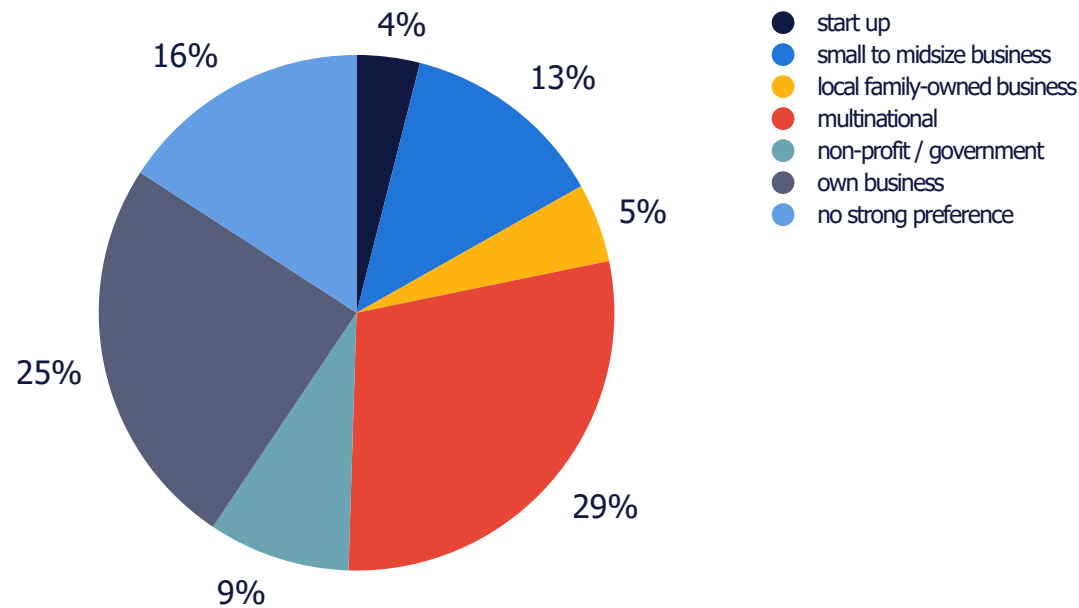


in focus.



# 29% of the portuguese prefer to work for large (multinational) corporation.

preferred company type



gen z (18-24)

6%

would prefer to work for a start up company

gen x (35-54)

29%

would prefer to work for a large (multinational) corporation

millennials (25-34)

15%

would prefer to work for a small to midsize business

boomers (55-64)

13%

would prefer to work for a non-profit / government organization

# company type preference reasons why.

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## start up (4%)

career progression  
pleasant work atmosphere  
flexible arrangements

---

## small to midsize (13%)

pleasant work atmosphere  
work-life balance  
career progression

---

## local family-owned (5%)

pleasant work atmosphere  
work-life balance  
job security

---

## multinational (29%)

financial health  
career progression  
attractive salary & benefits

---

## non-profit (9%)

interesting job content  
work-life balance  
gives back to society

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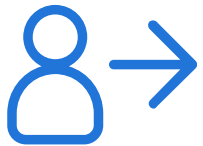
## own business (25%)

work-life balance  
pleasant work atmosphere  
flexible arrangements

---



# company type preference switchers vs stayers.



32%

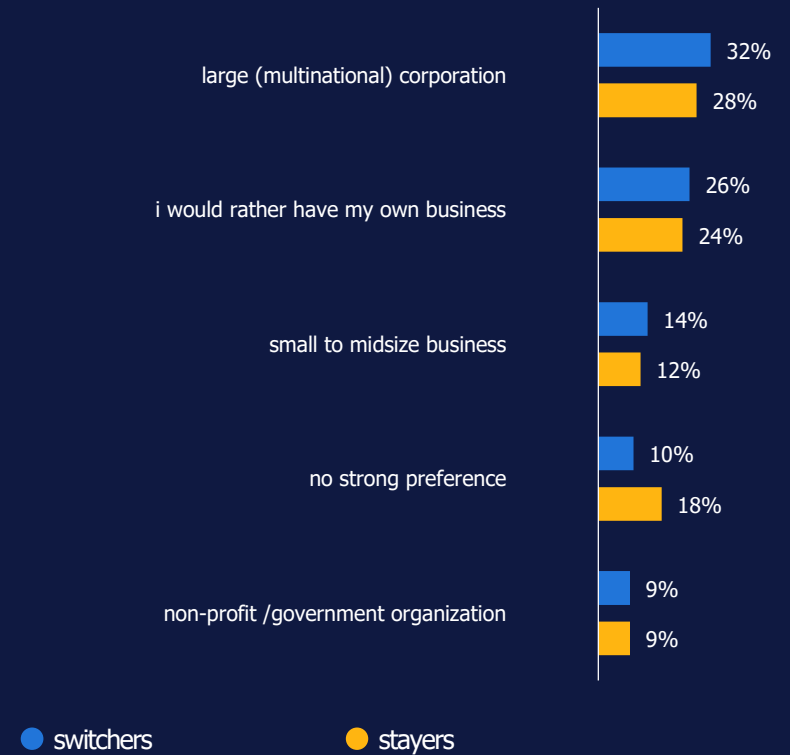
of the switchers prefer to work for a large (multinational) corporation.



18%

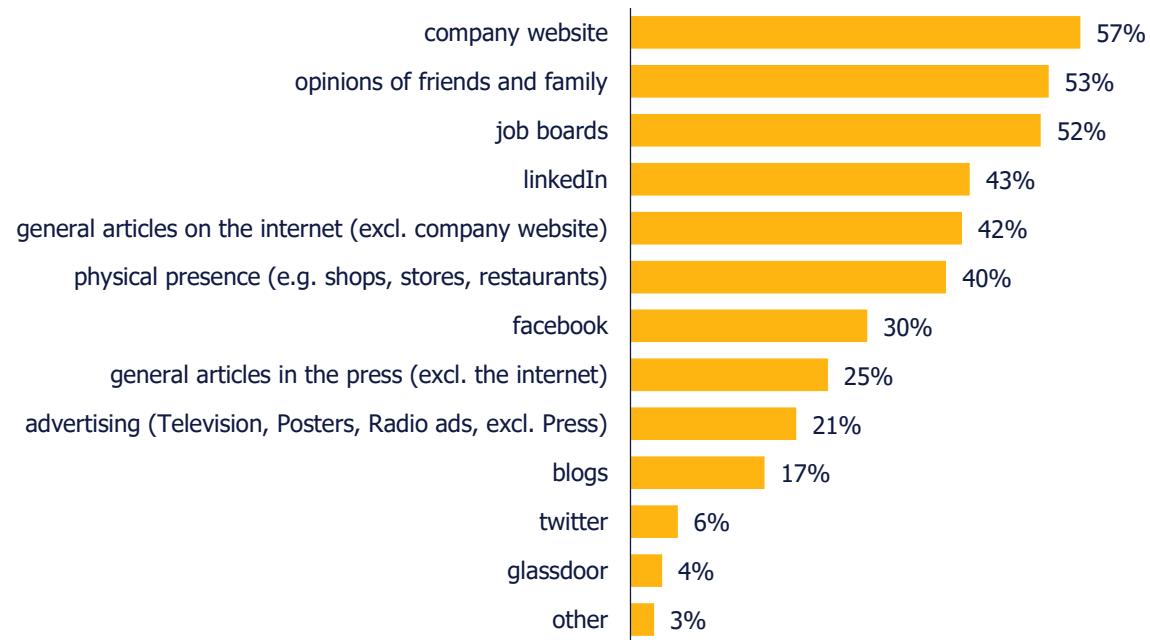
of the stayers has no strong preference.

## company type preference



# 92% of the portuguese check potential employer's reputation.

## channels for reputation check



## most often used

gen z (18-24)

42%

facebook

gen x (35-54)

27%

general articles in the press  
(excl. the internet)

millennials (25-34)

50%

linkedin

boomers (55-64)

25%

advertising

sector

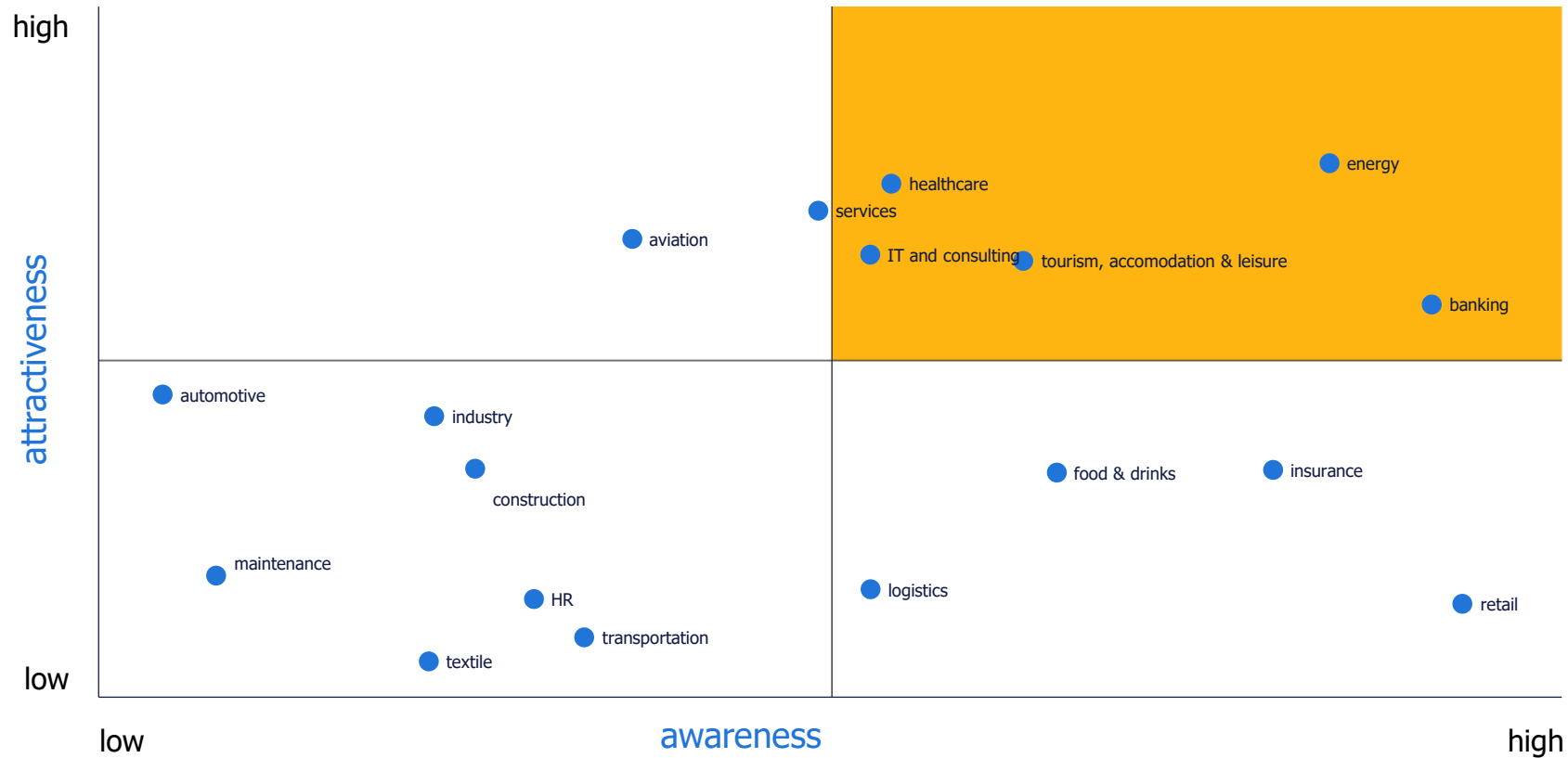


insights.





# top performing sectors in portugal 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.



# portugal's sectors score best on these 3 EVP drivers.

## 1/2

sector	top 3 EVP drivers		
	1	2	3
01 energy	financially healthy	uses latest technologies	very good reputation
02 healthcare	financially healthy	uses latest technologies	very good reputation
03 services	financially healthy	uses latest technologies	very good reputation
04 aviation	financially healthy	uses latest technologies	interesting job content
05 IT and consulting	uses latest technologies	financially healthy	very good reputation
06 tourism, accomodation & leisure	financially healthy	very good reputation	uses latest technologies
07 banking	financially healthy	uses latest technologies	job security
08 automotive	financially healthy	uses latest technologies	very good reputation
09 industry	financially healthy	uses latest technologies	very good reputation
10 media & telecom	uses latest technologies	financially healthy	very good reputation



# portugal's sectors score best on these 3 EVP drivers.

## 2/2

sector	top 3 EVP drivers		
	1	2	3
11 construction	uses latest technologies	financially healthy	very good reputation
12 insurance	financially healthy	very good reputation	uses latest technologies
13 food & drinks	financially healthy	very good reputation	job security
14 maintenance	financially healthy	job security	very good reputation
15 logistics	financially healthy	very good reputation	uses latest technologies
16 HR	financially healthy	uses latest technologies	very good reputation
17 retail	financially healthy	very good reputation	uses latest technologies
18 transportation	financially healthy	uses latest technologies	very good reputation
19 textile	financially healthy	very good reputation	uses latest technologies
20 restaurants & catering	financially healthy	very good reputation	uses latest technologies



top



employers.

# top employers in portugal.

## top 10 employers 2019

---

- 01 Microsoft
- 02 TAP - Transportes Aéreos Portugueses
- 03 Hovione Farmaciência
- 04 ANA - Aeroportos de Portugal
- 05 Siemens
- 06 Delta Cafés
- 07 Nestlé
- 08 Farfetch
- 09 Banco de Portugal
- 10 RTP - Rádio e Televisão de Portugal

## top 10 employers 2018

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- 01 Microsoft
- 02 HOVIONE FARMACIÊNCIA
- 03 TAP - Transportes Aéreos Portugueses
- 04 Nestlé
- 05 ANA - AEROPORTOS DE PORTUGAL
- 06 RTP - RÁDIO E TELEVISÃO DE PORTUGAL
- 07 Delta Cafés
- 08 Siemens
- 09 Banco de Portugal
- 10 Corticeira Amorim

# portugal's top companies

## top 3 EVP drivers of the top 5 companies.

	top 3 EVP drivers		
top 5 companies	1	2	3
1 Microsoft	uses latest technologies	financially healthy	very good reputation
2 TAP - Transportes Aéreos Portugueses	uses latest technologies	interesting job content	job security
3 Hovione Farmaciência	financially healthy	uses latest technologies	very good reputation
4 ANA - Aeroportos de Portugal	uses latest technologies	financially healthy	job security
5 Siemens	uses latest technologies	financially healthy	very good reputation

# top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	Microsoft	Banco de Portugal	Hovione Farmaciência
career progression	Microsoft	Siemens	Banco de Portugal
financially healthy	Microsoft	Delta Cafés	Nestlé
gives back to society	Suma - serviços urbanos e meio ambiente	Delta Cafés	Microsoft
interesting job content	Microsoft	OGMA - indústria aeronáutica de Portugal	TAP - Transportes Aéreos Portugueses
job security	Microsoft	Banco de Portugal	Delta Cafés
pleasant work atmosphere	Microsoft	Delta Cafés	Farfetch
uses latest technologies	Microsoft	Fujitsu Technology Solutions	Siemens
very good reputation	Microsoft	Delta Cafés	Nestlé
work-life balance	Microsoft	Delta Cafés	Farfetch

deep dive

appendix 1.

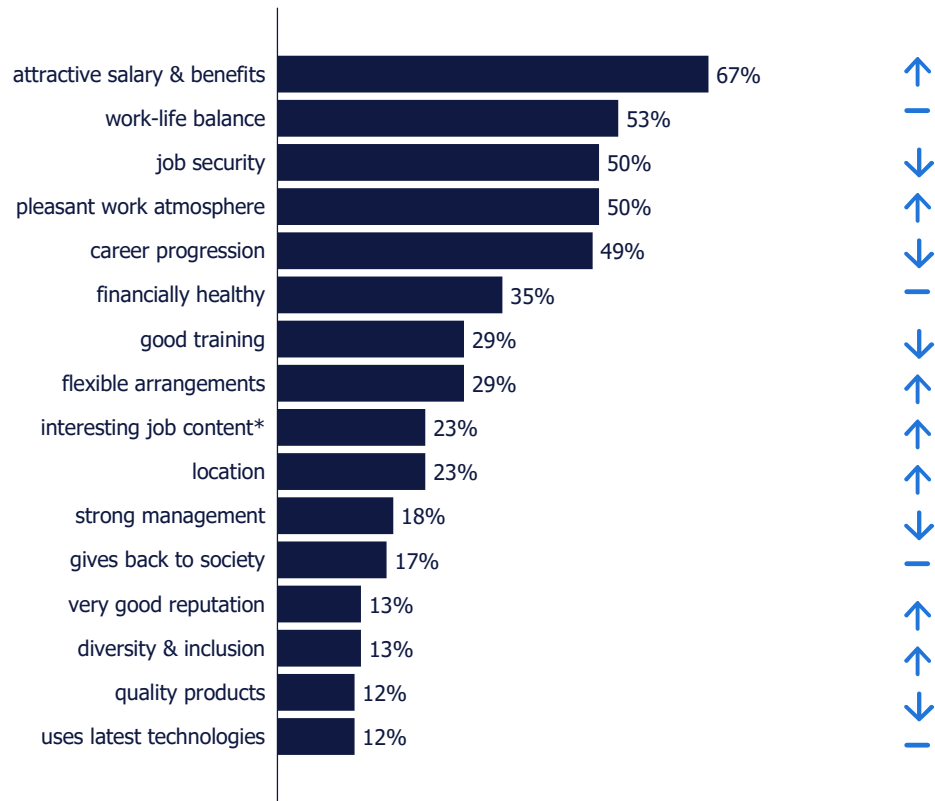




# what potential employees want

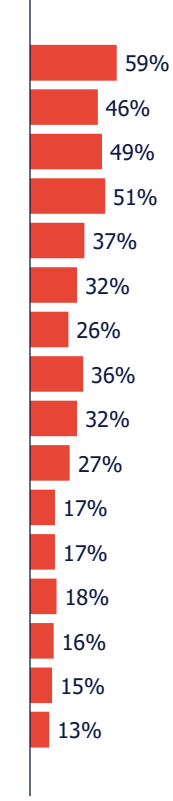
## the most important criteria when choosing an employer.

### important criteria

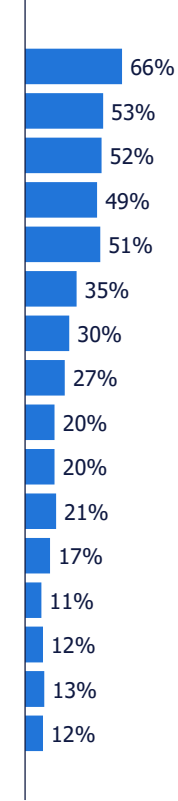


### versus 2018

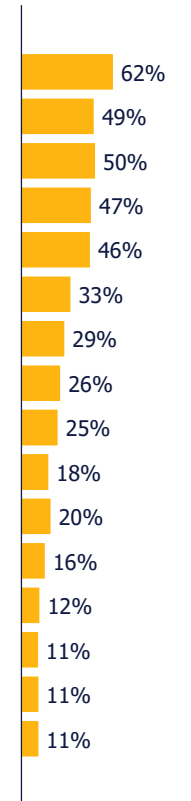
### europa



### 2018



### 2017

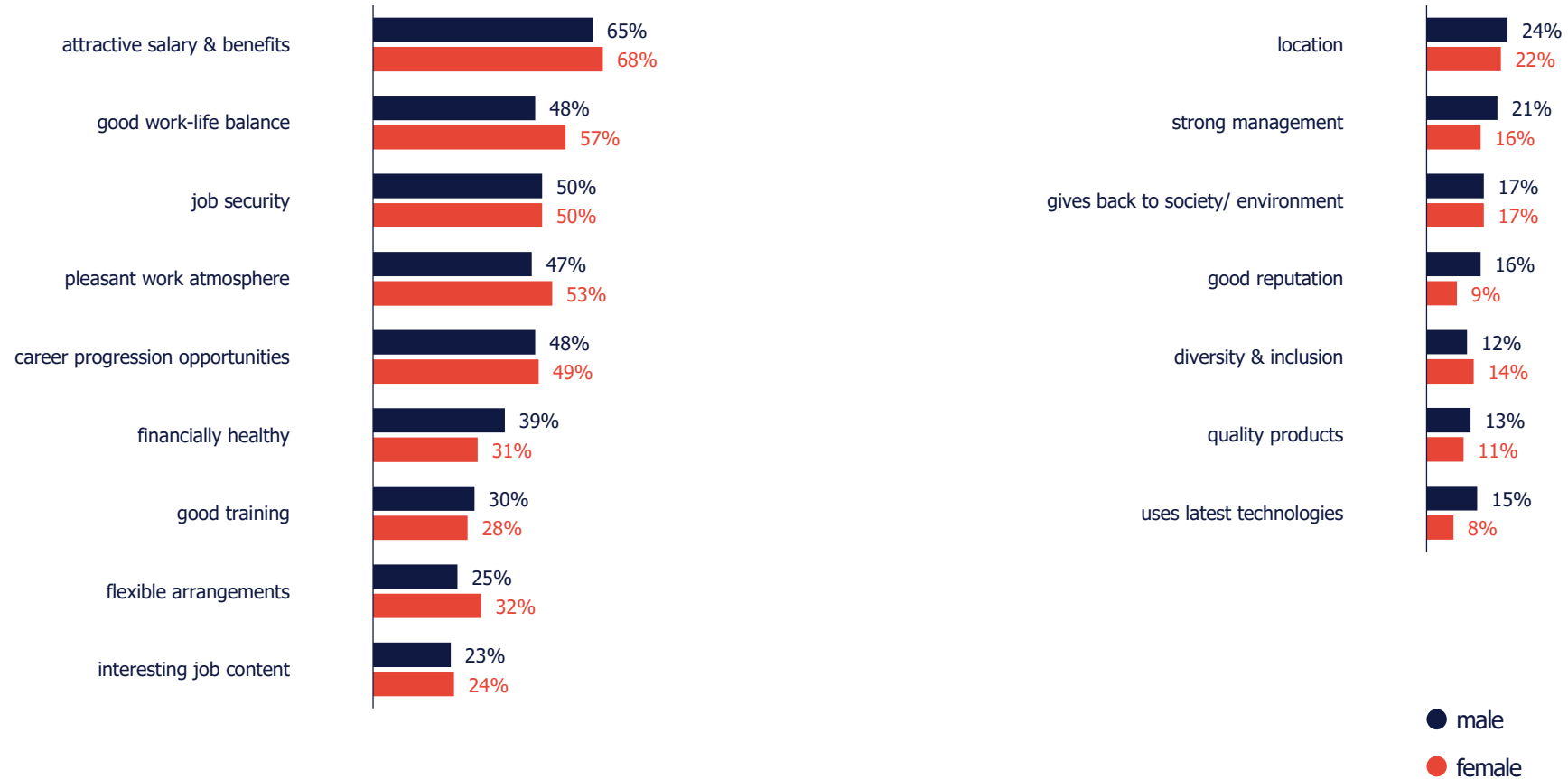


Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.

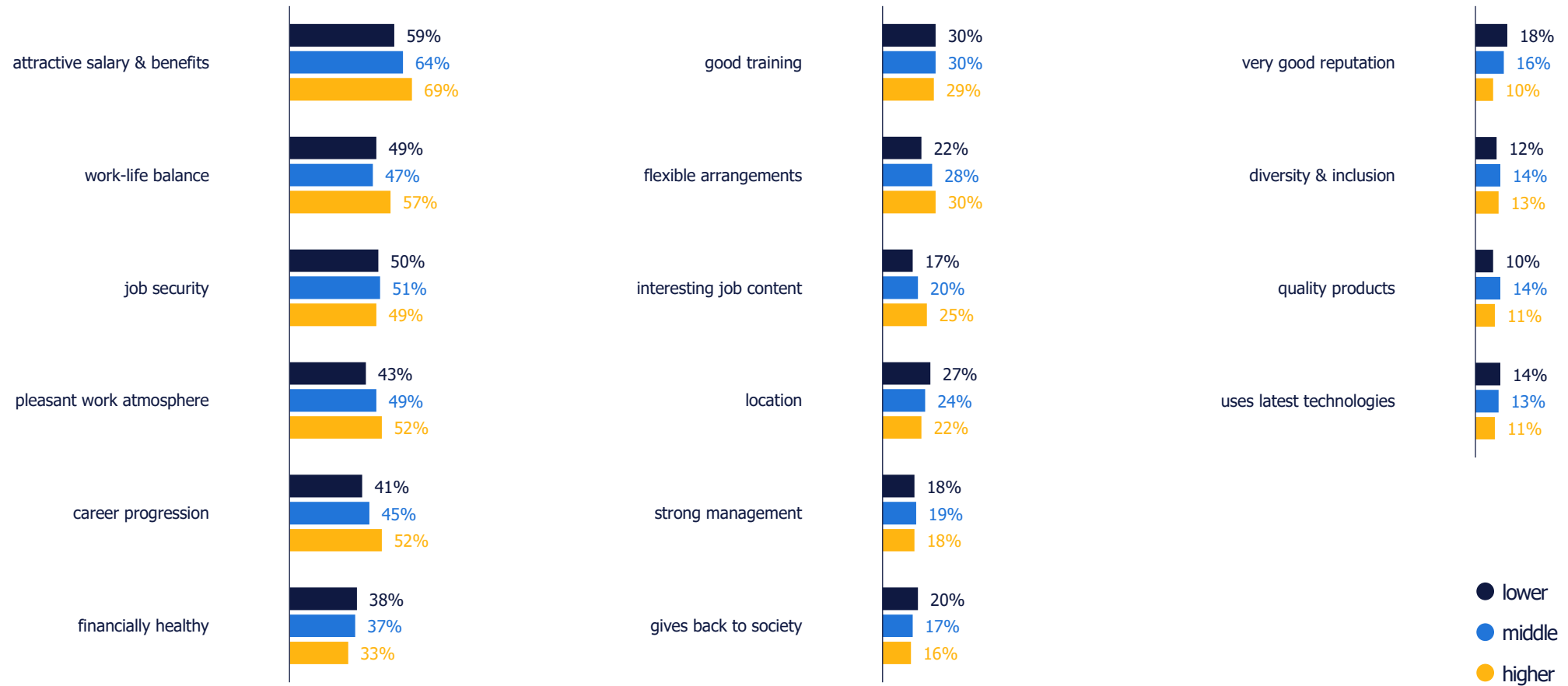
\*2017: work that is stimulating and challenging



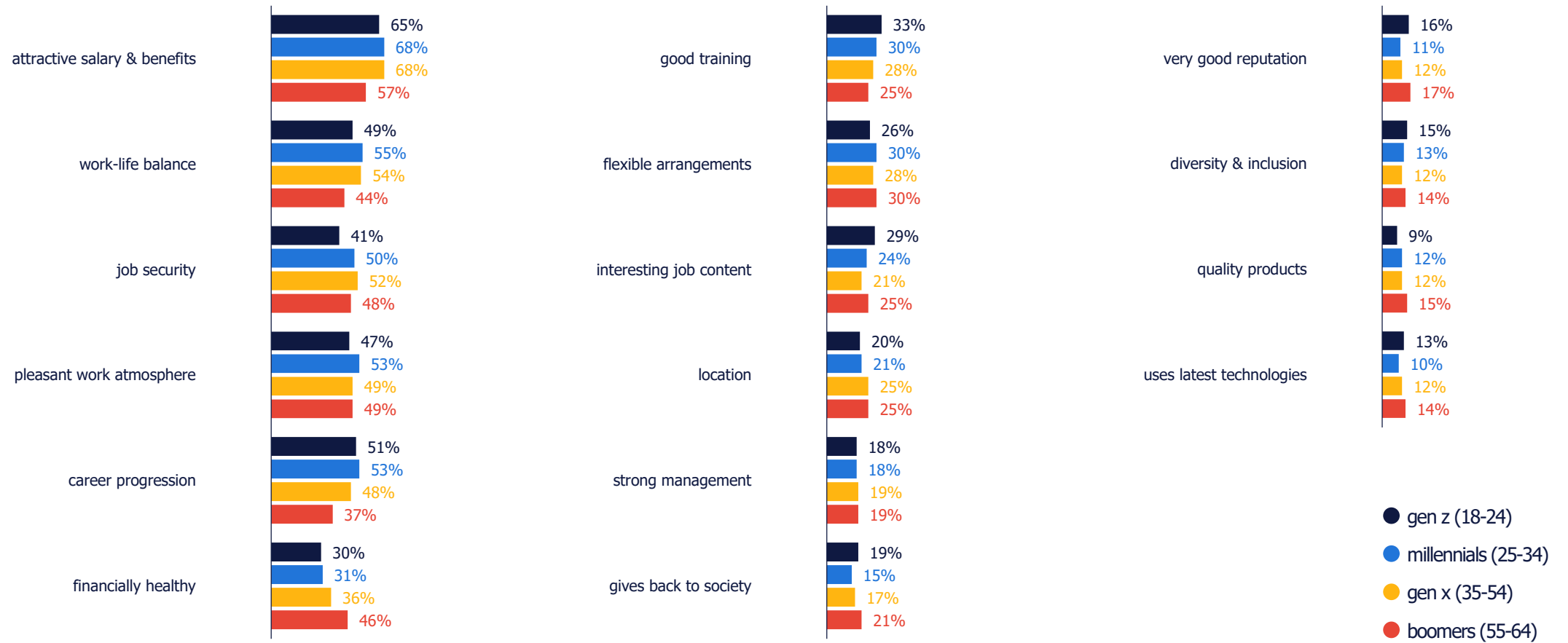
# EVP driver importance by gender.



# EVP driver importance by education.



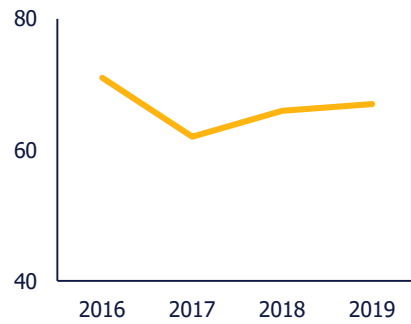
# EVP driver importance by age.



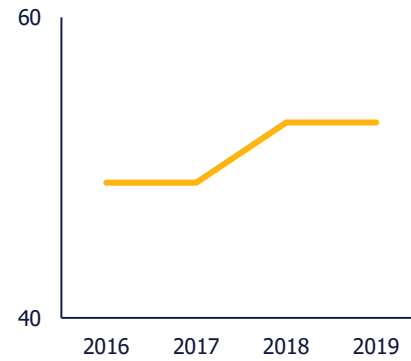
# EVP driver importance trends, total.

1/2

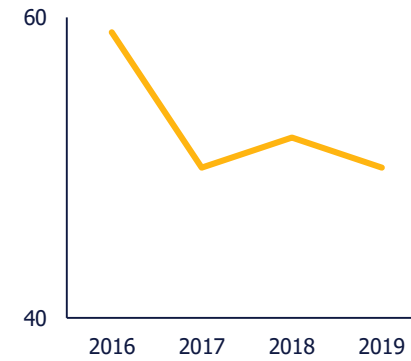
attractive salary & benefits



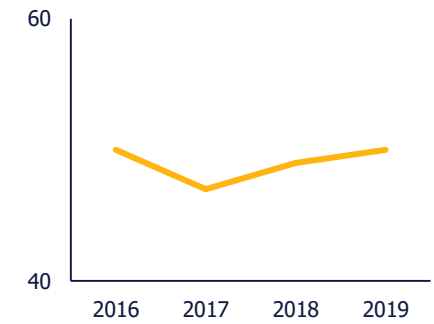
work-life balance



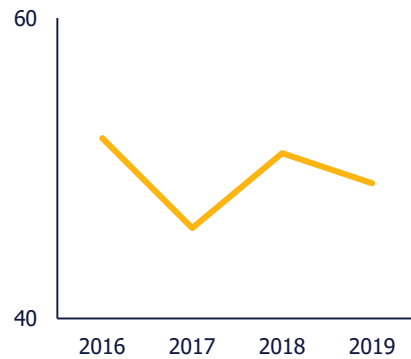
job security



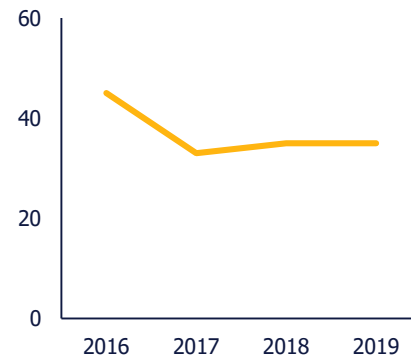
pleasant work atmosphere



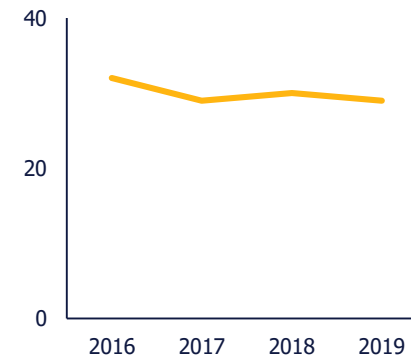
career progression



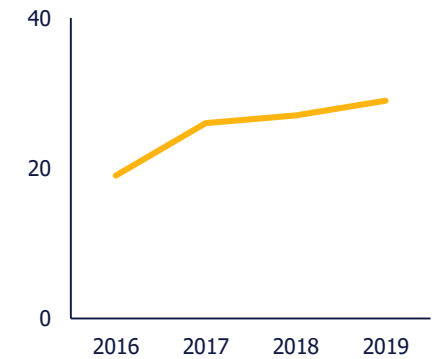
financially healthy



good training



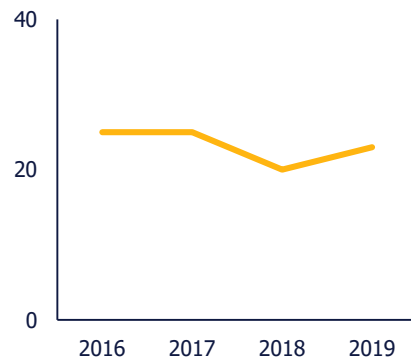
flexible arrangements



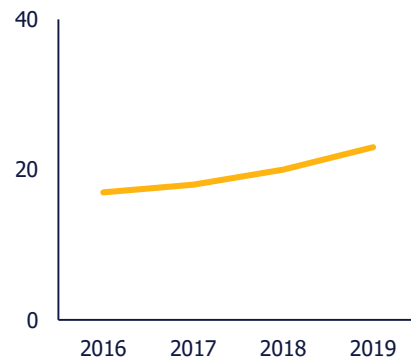
# EVP driver importance trends, total.

2/2

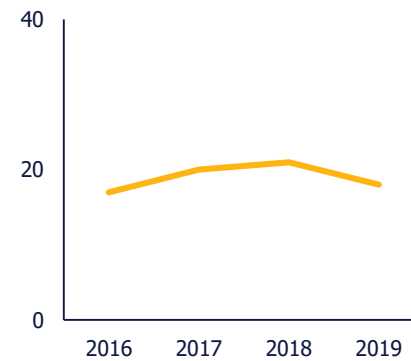
interesting job content\*



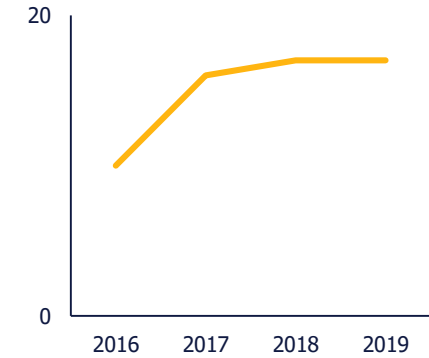
location



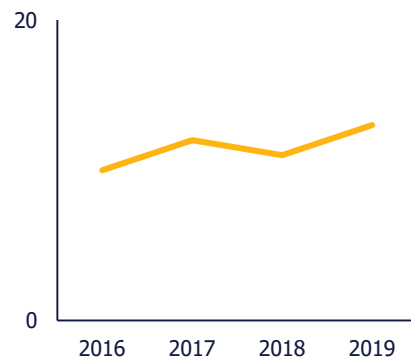
strong management



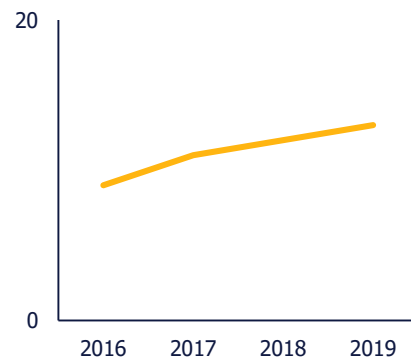
gives back to society



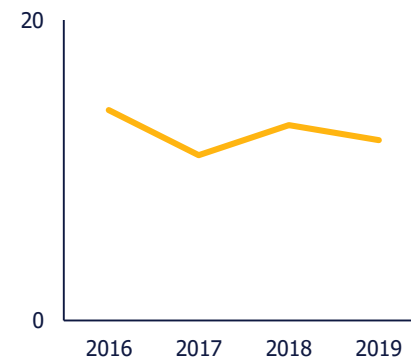
very good reputation\*



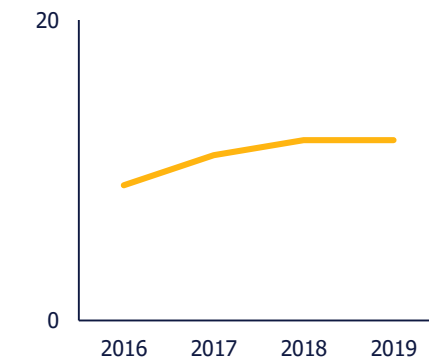
diversity & inclusion



quality products



uses latest technologies

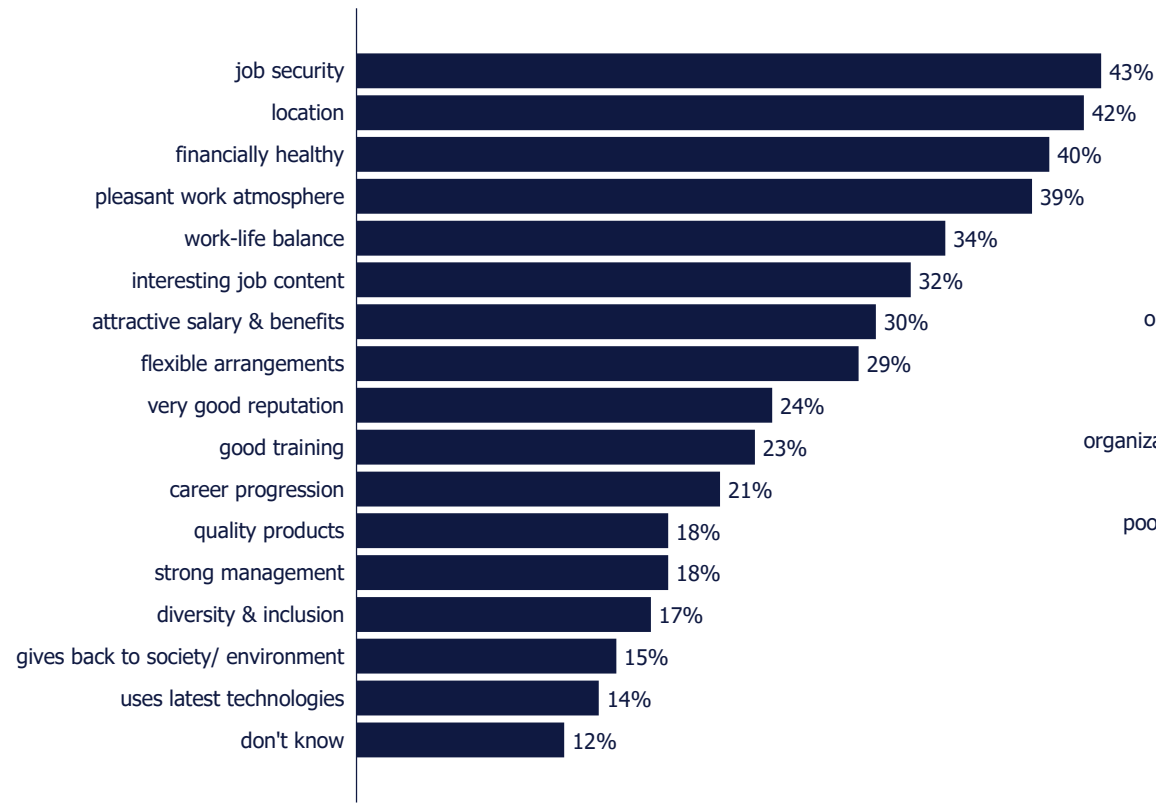


\*2017: work that is stimulating and challenging  
 \*\*previous to 2017: strong image/strong values



# what factors do the portuguese stay or leave for.

## reasons to stay



## reasons to leave



# methodology



## appendix 2.



# methodology

## why smart sampling?

Since REBR 2017 companies are evaluated between 140 and 400 respondents. The actual number of evaluations per company depends on the awareness of the company.

The error margin is determined by the % of respondents giving a certain answer and the sample size to which the question has been asked. The highest error margin occurs when 50% of the respondents give a certain answer. The error margin is lower when 30% (or 70%) of the respondents give a certain answer.

### example

140 respondents have evaluated company X. Of these 140, 50% find the company nice to work for. Taking the error margin at  $n=140/50\%$  into account, the real answer lies between 42% and 58%.

400 respondents have evaluated company Y and of these 400, 50% finds the company nice to work for. Taking the error margin at  $n=400/50\%$  into account, the real answer lies between 45% and 55%.

1200 respondents have evaluated company Z and of these 1200, 50% finds the company nice to work for. Taking into account the error margin at  $n=1200/50\%$ , the real answer lies between 47% and 53%.

Therefore, the difference in error margin is very small between  $n=1200$  and  $n=400$  evaluations per company (5% margin vs 3% margin at the most). As such it can be concluded that maximum 400 evaluations per company are sufficient in order to determine a reliable attractiveness per company.

In practice, this means that every company with an awareness over 35% will have max 400 respondents evaluating the company. Companies with an awareness below 35% will be evaluated by 140 to 400 people (depending on awareness).



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# 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

- Ipienit 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.



name organization  
name contact  
person



name organization  
name contact  
person



name organization  
name contact  
person



name organization  
name contact  
person

randstad

human forward.

