

employer
brand research
2020



portugal.

content.

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



introduction.



why employer branding matters.



Companies are overpaying on salaries by 10% if they don't have a strong brand.¹

50%

of candidates say they wouldn't work for a company with a bad reputation – even with a pay increase.²

96%

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

80%

of workforce leaders agree that a strong employer brand has a significant impact on their ability to hire great workforce.⁴ 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.

19%

Only 19% of employees globally perceive a strong alignment between what their employer says about itself and their experience working there.⁵

52%

52 % of candidates first seek out the company's website and social media to learn more about an employer.⁶

#1

#1 obstacle to candidates in the application process is not knowing what it's like to work at an organization.⁷

1-2x

Companies with a strong employer brand have a 1- 2 x faster time to hire.⁸

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.⁹



the employer brand roadmap.



what is the randstad employer brand research?

- a representative employer brand research based on perceptions of the general audience. Optimizing over 20 years of successful employer branding insights.
- an independent survey with nearly 185,000 respondents in 33 markets worldwide.
- a reflection of employer attractiveness for the market's 150 largest employers known by at least 10% of the population.
- provides valuable insights to help employers shape their employer brand.



33 markets surveyed covering more than 75% of the global economy.

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



● markets surveyed

worldwide

- nearly 185,000 respondents
- 6,136 companies surveyed

sample

- aged 18 to 64
- representative on gender
- overrepresentation of age 25 – 44
- comprised of students, employed and unemployed workforce

country

- 4,481 respondents

fieldwork

- online interviews
- between 18 december 2019 and 30 december 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.

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

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



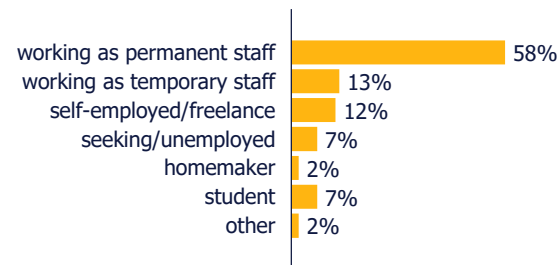
sample composition in portugal

socio-demographics, employment status, region.

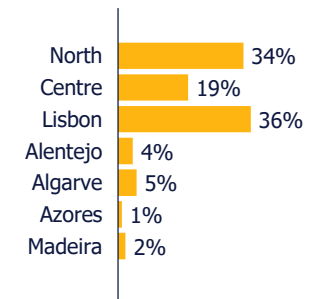
gender



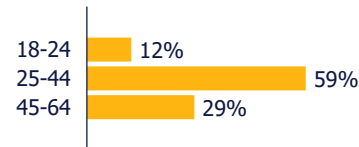
employment status



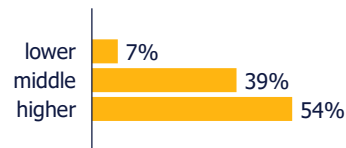
region



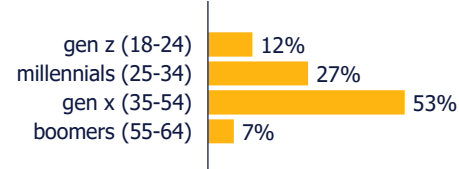
age



education



generation

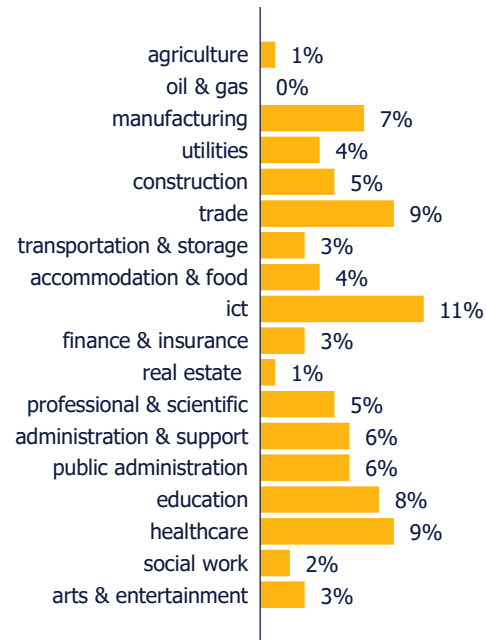


total sample: 4,481
 fieldwork: between 18 december 2019 and 30 december 2019



sample composition in portugal.

sector



function



base: currently employed (n=3,705)



portugal

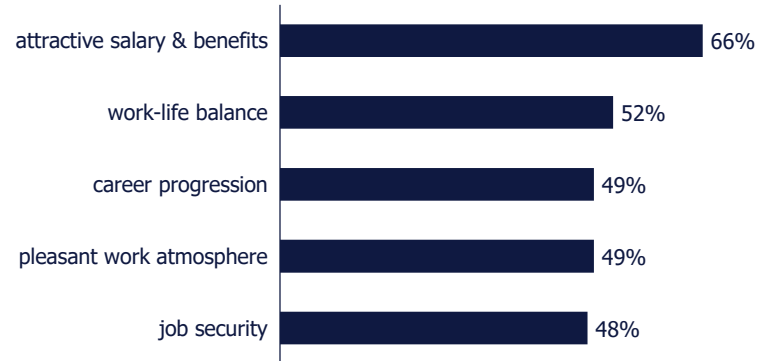
EVP drivers.



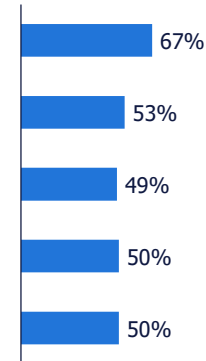
what potential employees want when choosing an employer.

most important criteria

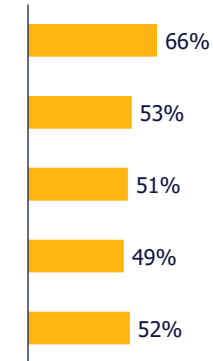
portugal 2020



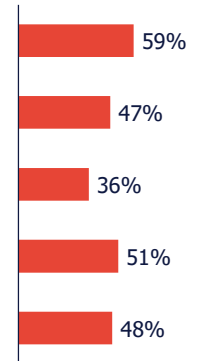
portugal 2019



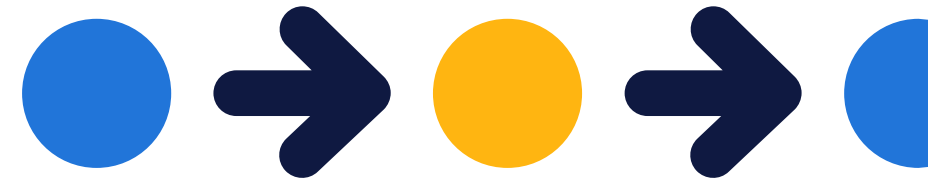
portugal 2018



europa 2020



[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.

Understanding the gap between what employees want and what they think employers offer provides valuable insights into building an employer brand. Furthermore, benchmarking against what employees perceive being offered by their current employer gives more context to the gaps that need to be bridged.

evaluation of current employer.	general perception of employers in portugal.	profile of ideal employer.
1 job security	1 financially healthy	1 attractive salary & benefits
2 financially healthy	2 uses latest technologies	2 work-life balance
3 very good reputation	3 very good reputation	3 career progression
4 interesting job content	4 job security	4 pleasant work atmosphere
5 pleasant work atmosphere	5 pleasant work atmosphere	5 job security
6 gives back to society	6 career progression	6 financially healthy
7 uses latest technologies	7 interesting job content	7 interesting job content
8 work-life balance	8 attractive salary & benefits	8 gives back to society
9 career progression	9 work-life balance	9 very good reputation
10 attractive salary & benefits	10 gives back to society	10 uses latest technologies



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

Employers in a market 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

attractive salary & benefits

work-life balance

career progression



what do potential employees want by generational profile.

gen z (18-24)

20%

of the gen z's are looking for diversity and inclusion in their employer. This is higher when compared to older workforce (millennials 16%, gen x 14%, boomers 14%).

gen x (35-54)

35%

of the gen x's find financial health a very important pull factor towards an employer. Among younger generations, this factor is deemed less important (gen z 28%, millennials 31%).

millennials (25-34)

54%

of the millennials seek a pleasant work-life balance. Boomers (48%) are less interested in this offering from their employer.

boomers (55-64)

27%

of the boomers find giving back to society a very important pull factor towards an employer This less so among gen z's (21%). Millennials (19%) and gen x's (20%).

[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.

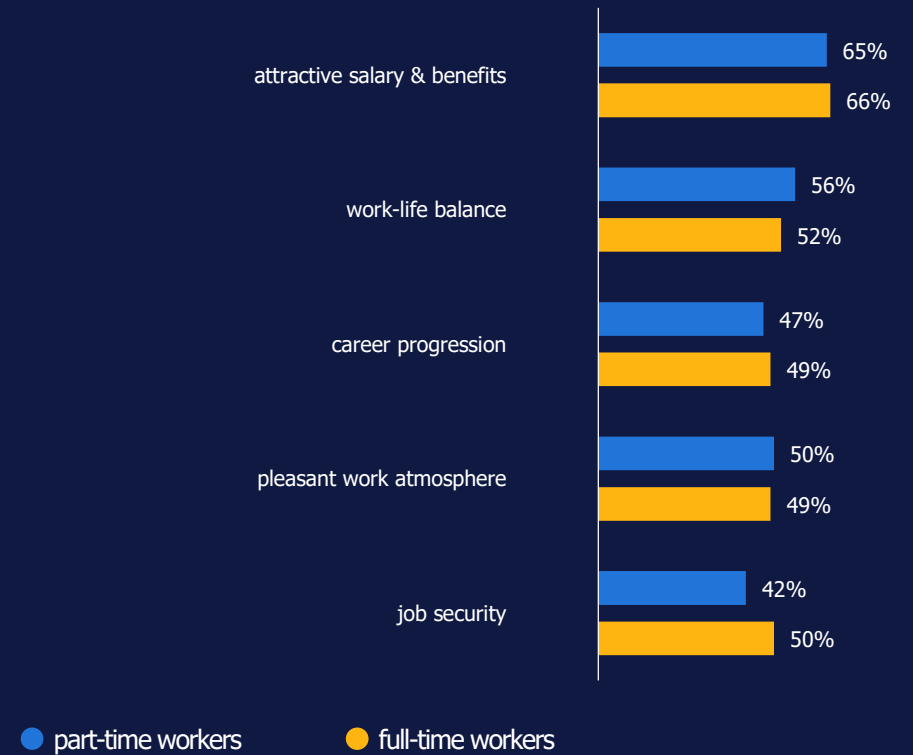


7%

of today's workforce
works part-time.
(less than 30 hours per week)



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.



most important attributes switchers vs stayers.

switchers

2019

20%



2020

19%

changed employer in the past year.

stayers

2019

80%

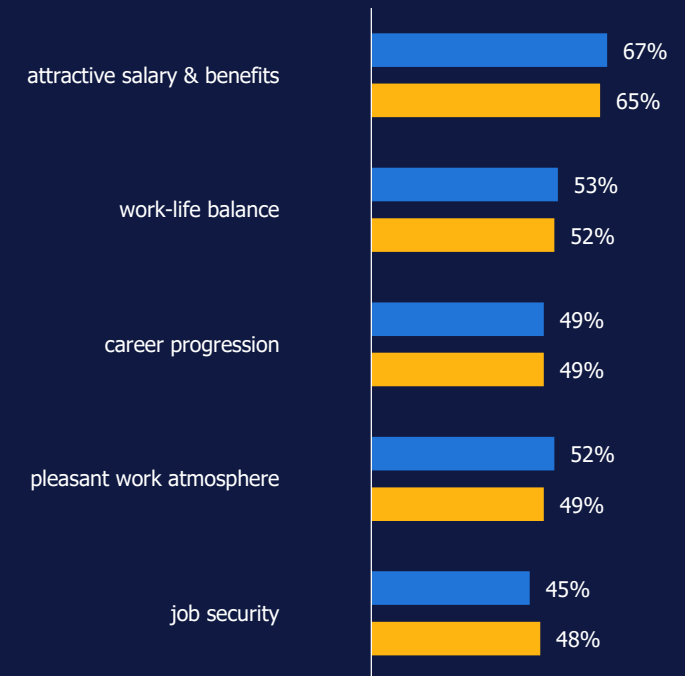


2020

81%

stayed with their employer in the past year.

most important attributes



● switchers

● stayers



most important attributes intenders.

intenders

2019

31%

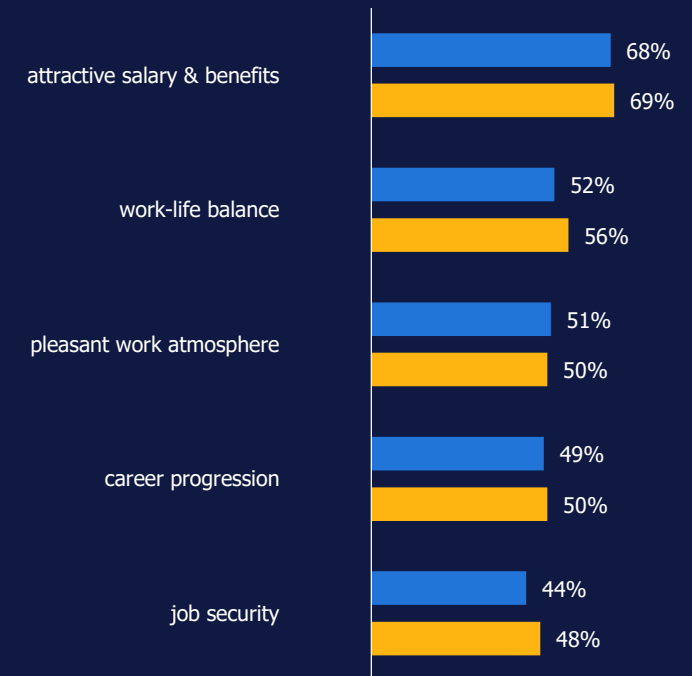
→

2020

30%

plan to change employer
within the next year.

most important attributes among intenders



● 2020

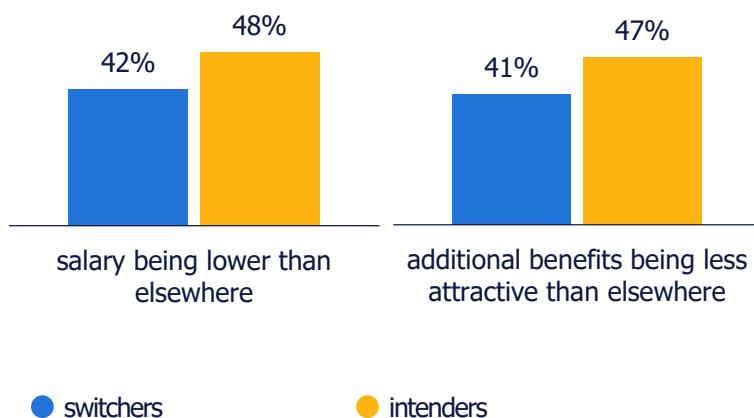
● 2019



switchers vs intenders

financial reasons.

% (completely) agrees with the statement
"I changed my job or plan to do so" because of:



portugal

45%

is leaving or planning to do so because of a lower salary compared to elsewhere.

europa

52%

is leaving or planning to do so because of a lower salary compared to elsewhere.

44%

is leaving or planning to do so because of less attractive additional benefits compared to elsewhere.

45%

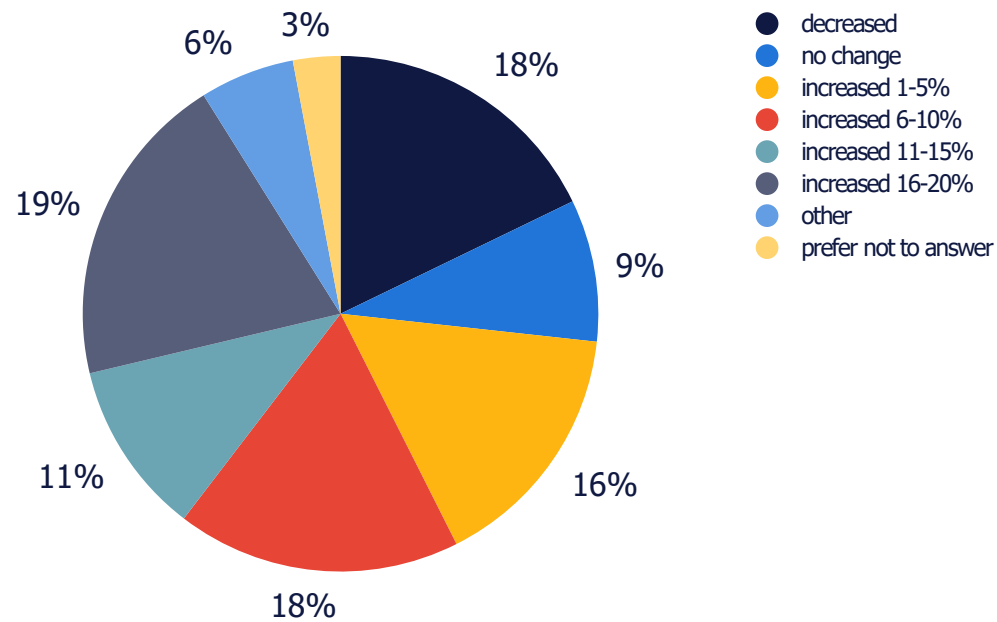
is leaving or planning to do so because of less attractive additional benefits compared to elsewhere.



switching for higher salary

about 1 in 3 switchers gets a 1 to 10% pay increase.

salary change after switch



portugal

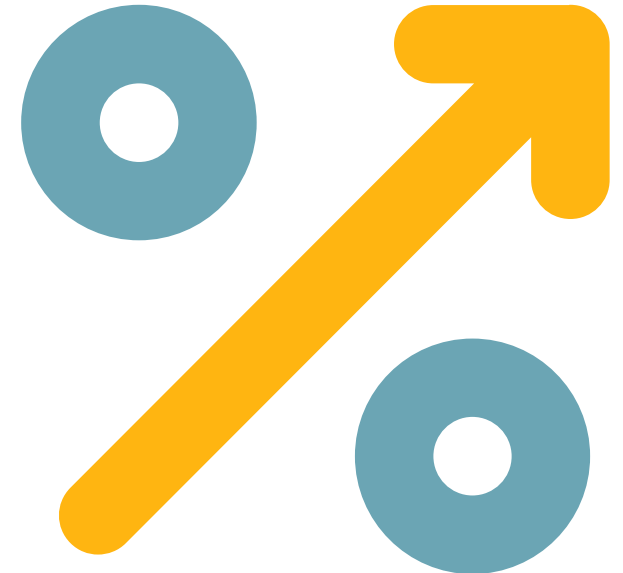
34%

employees who left previous employer for a higher salary elsewhere saw a salary increase between 1% and 10%.

europe

39%

employees who left previous employer for a higher salary elsewhere saw a salary increase between 1% and 10%.



switchers vs intenders

emotional reasons.

% (completely) agrees with the statement
"I changed my job or plan to do so" because of:

portugal

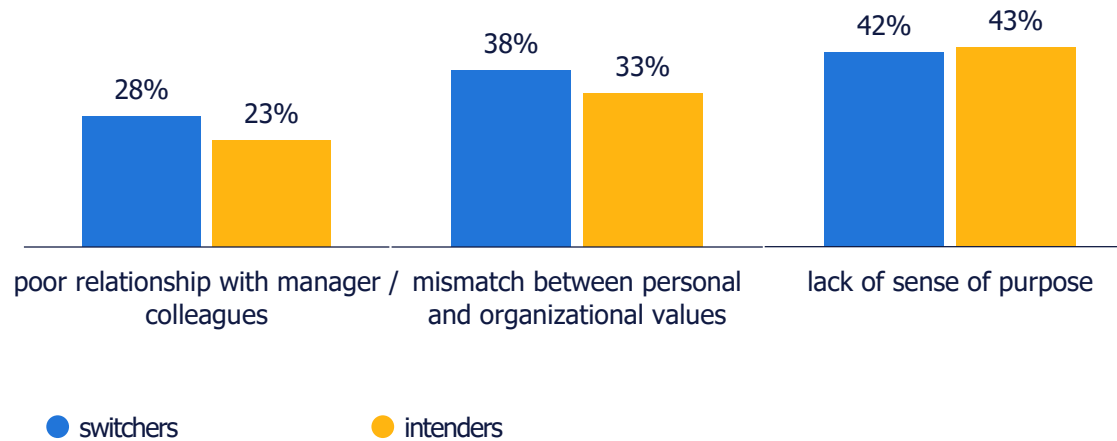
83%

find non-monetary benefits important.

europa

62%

find non-monetary benefits important.



reasons to leave by profile.

salary being lower than elsewhere

53%

of the **boomers** are likely to leave an employer if they receive a higher salary elsewhere.

additional benefits being less attractive

52%

of the **boomers** are likely to leave their employer if additional benefits offered by other employers are more attractive. This is higher when compared to gen z (36%).

poor relationship with manager

25%

of the **millennials and gen x's** agree that a poor relationship with their manager is a serious reason to consider working elsewhere. This is higher when compared to gen z (17%).

mismatch between personal and organizational values

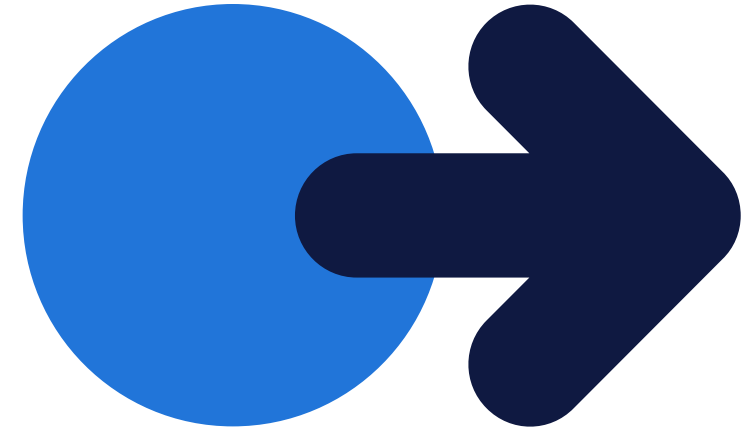
37%

of the **boomers** would leave their employer if the organizational values do not match their personal values.

lack of sense of purpose

43%

of the **millennials** may leave or have left their employer if they lack a sense of purpose in their job.



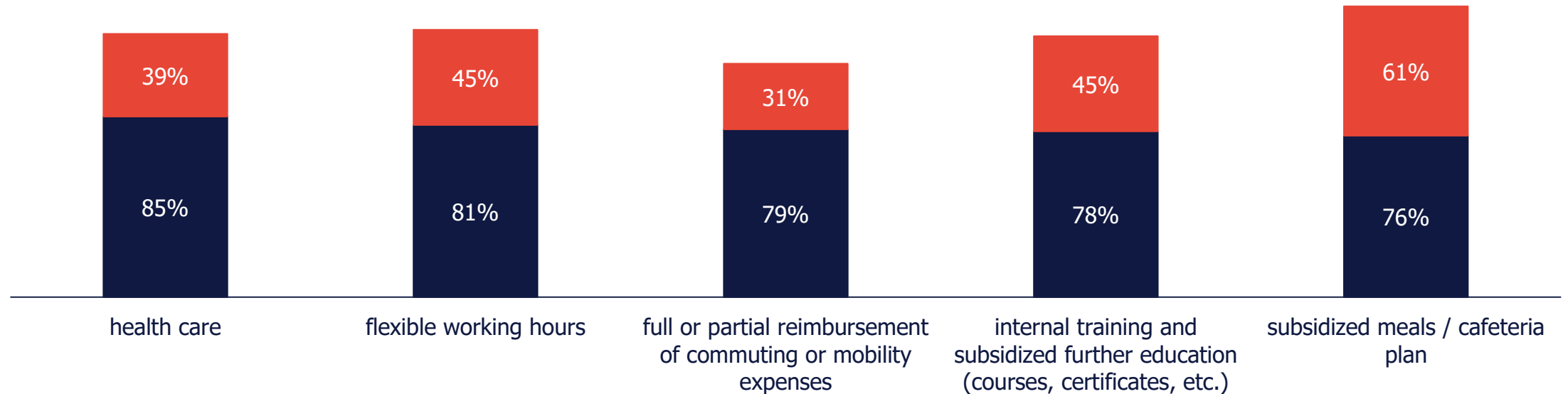
additional
benefits

in focus.



employee benefits that workforce in portugal finds attractive and are received.

top 5 most attractive benefits & received



● attractive ● attractive & received

[click here](#) for full results.



most attractive benefits by profile.

gen z (18-24)

63%

of the gen z's find discounts on the company's products attractive as an employment benefit. This is higher when compared to millennials (52%).

gen x (35-54)

87%

of the gen x's find health care attractive as an employment benefit. This is higher when compared to gen z (73%) and millennials (82%).

millennials (25-34)

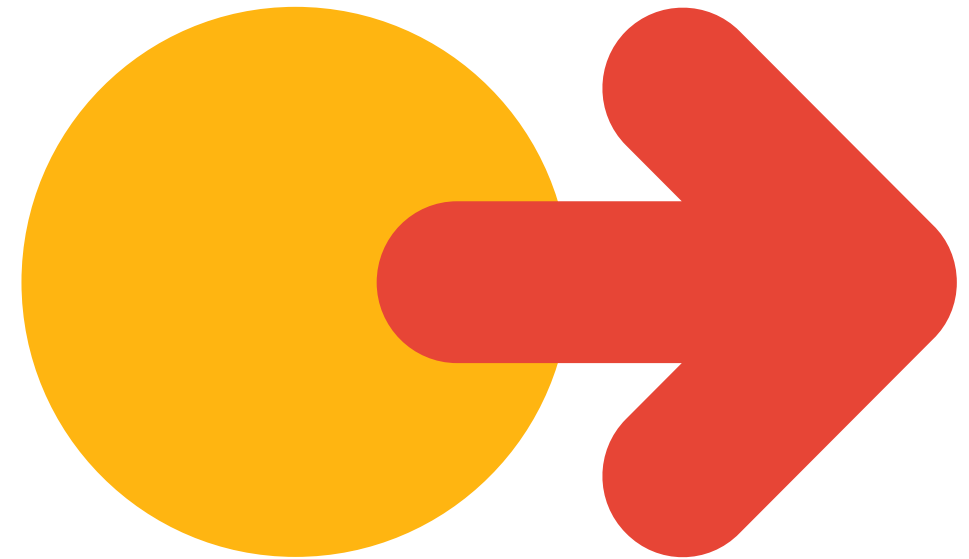
76%

of the millennials find the possibility of working at home attractive as an employment benefit.

boomers (55-64)

89%

of the boomers find full or partial reimbursement of commuting or mobility expenses attractive as an employment benefit. This is higher when compared to gen z (70%), millennials (77%) and gen x's (80%).

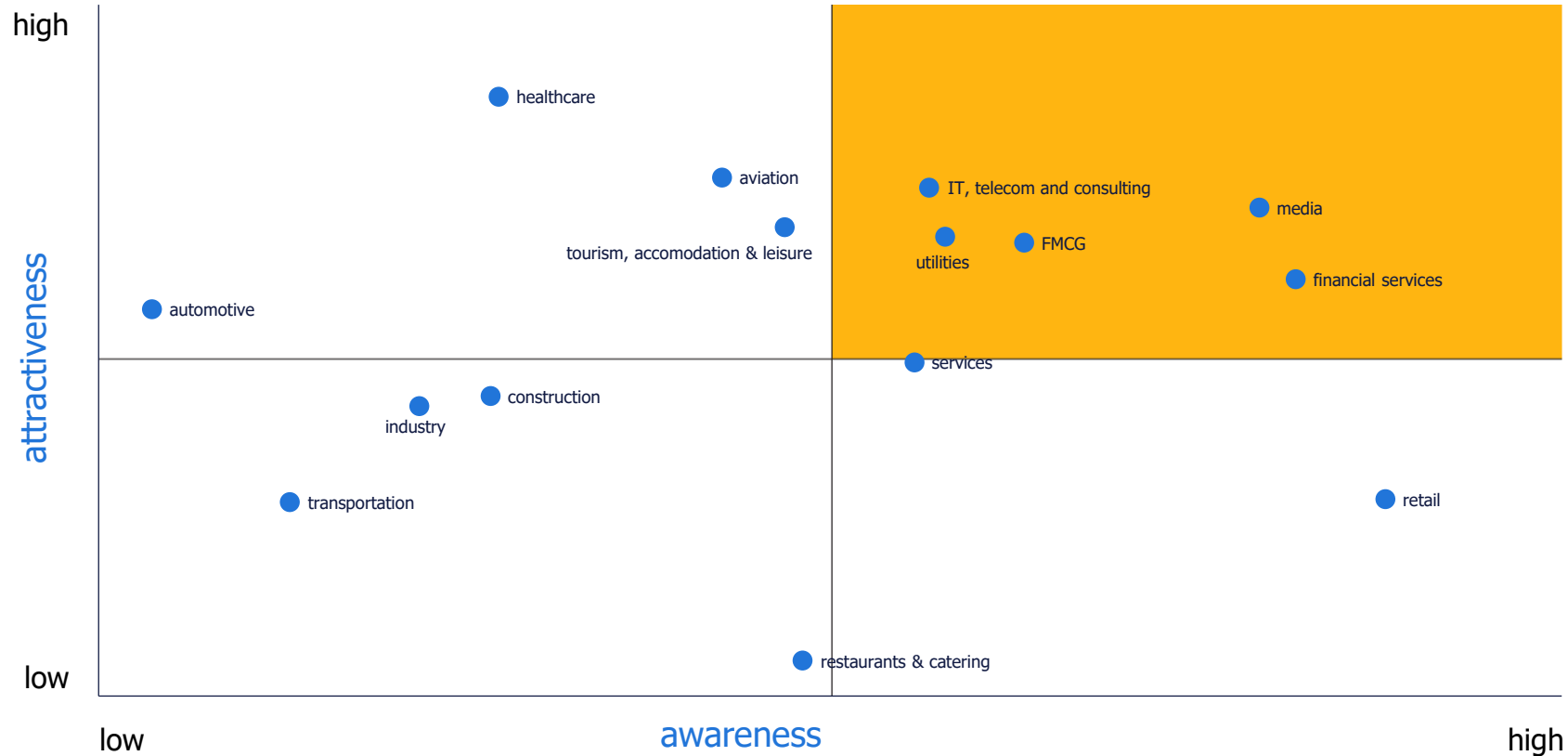


sector



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 best performing companies by sector.

1/2

sector	top 3 companies		
	1	2	3
01 healthcare	Lusíadas Saúde	Hovione	LABESFAL Farma
02 aviation	TAP - Transportes Aéreos Portugueses	ANA - Aeroportos de Portugal	OGMA - indústria aeronáutica de Portugal
03 it, telecom and consulting	Farfetch	Siemens	Fujitsu Technology Solutions
04 media	RTP - Rádio e Televisão de Portugal	Media Capital (TVI, EMAV...)	COFINA (Correio da Manhã, Jornal de Negócios, Record, Sábado...)
05 tourism, accomodation & leisure	Pestana Hotel Group	Hoteís Real	Vila Galé
06 utilities	EDP	EFACEC	Enercon
07 fmcg	Delta Cafés	Nestlé	Sumol+Compal
08 financial services	Banco de Portugal	Caixa Geral de Depósitos	Millenium BCP
09 automotive	Volkswagen autoeuropa	Grupo Salvador Caetano	APTIV (Delphi automotive systems)
10 services	PWC	CTT	Brisa

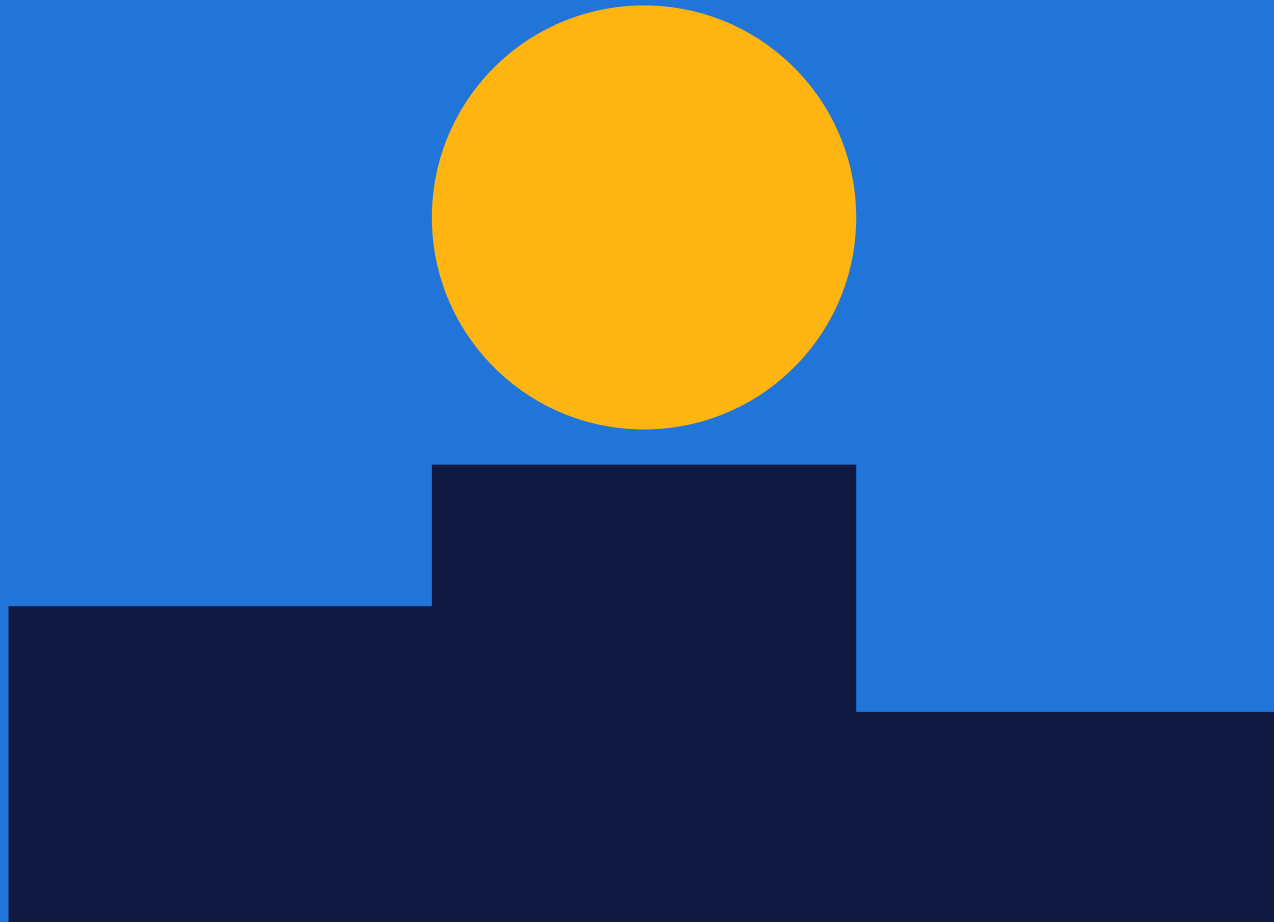


portugal's best performing companies by sector.

2/2

sector	top 3 companies		
	1	2	3
11 construction	Conduril - Engenharia	Mota-Engil	C.M.E.- Construção e Manutenção Eletromecânica
12 industry	Bosch	BA vidro	Volkswagen autoeuropa
13 retail	Fnac	Ikea Portugal	Grupo Jerónimo Martins
14 transportation	Transbase - transportes e logística	TJA - Transportes J. Amaral	Sociedade de Transportes Colectivos do Porto
15 restaurants & catering	Grupo Trivalor (Gertal, Itau, Sogenave...)	Uniself - sociedade de restaurantes	Eurest

top



employers.

top employers to work for in portugal.

top 10 employers 2020

- 01 TAP - Transportes Aéreos Portugueses
- 02 Banco de Portugal
- 03 RTP - Rádio e Televisão de Portugal
- 04 Lusíadas Saúde
- 05 ANA - Aeroportos de Portugal
- 06 Delta Cafés
- 07 Hovione
- 08 OGMA - indústria aeronáutica de Portugal
- 09 Farfetch
- 10 PWC

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
-

portugal's top 3 EVP drivers of the top 5 companies.

top 5 companies	1	2	3
1 TAP - Transportes Aéreos Portugueses	uses latest technologies	interesting job content	very good reputation
2 Banco de Portugal	financially healthy	job security	attractive salary & benefits
3 RTP - Rádio e Televisão de Portugal	uses latest technologies	interesting job content	very good reputation
4 Lusíadas Saúde	financially healthy	uses latest technologies	very good reputation
5 ANA - Aeroportos de Portugal	uses latest technologies	financially healthy	very good reputation



portugal's top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	Banco de Portugal	Farfetch	Siemens
career progression	PWC	Banco de Portugal	Siemens
financially healthy	IKEA industry	Delta Cafés	Banco de Portugal
gives back to society	Delta Cafés	Ikea Portugal	Lusiadas Saúde
interesting job content	Farfetch	RTP - Rádio e Televisão de Portugal	TAP - Transportes Aéreos Portugueses
job security	Banco de Portugal	Delta Cafés	OGMA - indústria aeronáutica de Portugal
pleasant work atmosphere	Delta Cafés	Farfetch	BA vidro
uses latest technologies	Farfetch	Siemens	Nokia
very good reputation	Delta Cafés	Nestlé	Bosch
work-life balance	Delta Cafés	OGMA - indústria aeronáutica de Portugal	Banco de Portugal

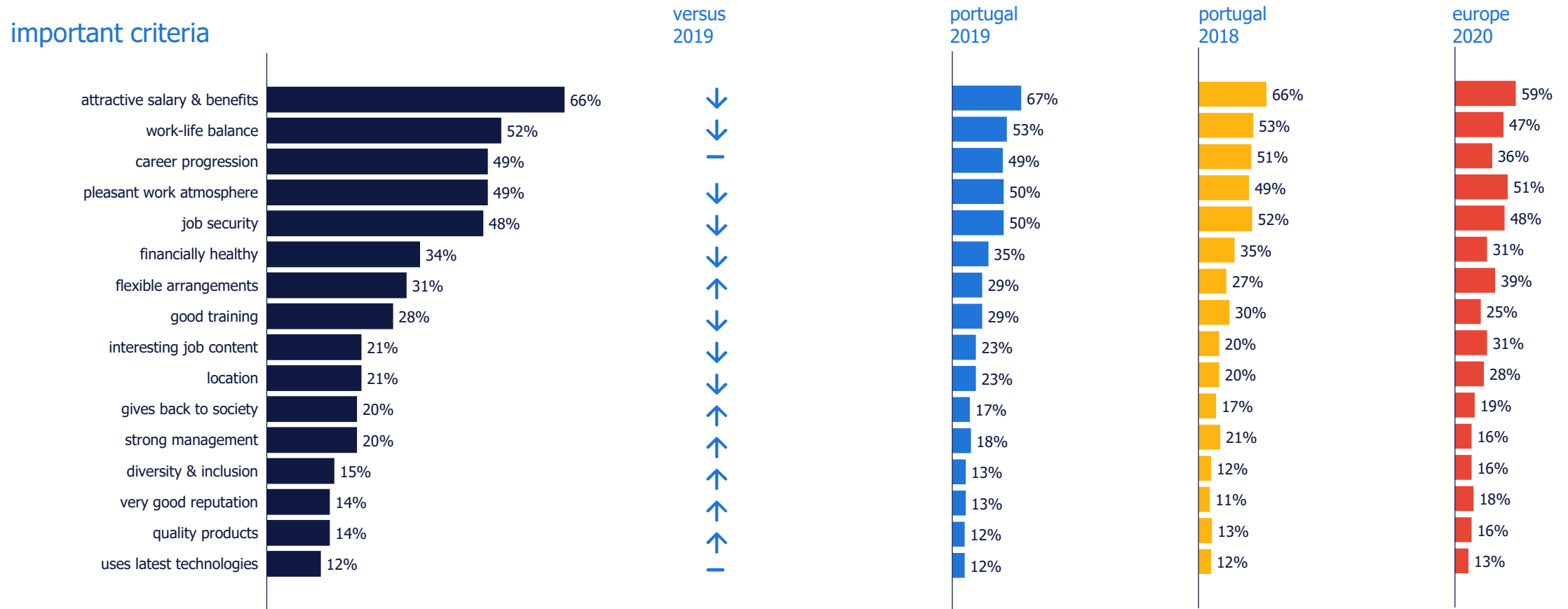
deep dive
EVP drivers

2020 employer
brand research.



what potential employees want

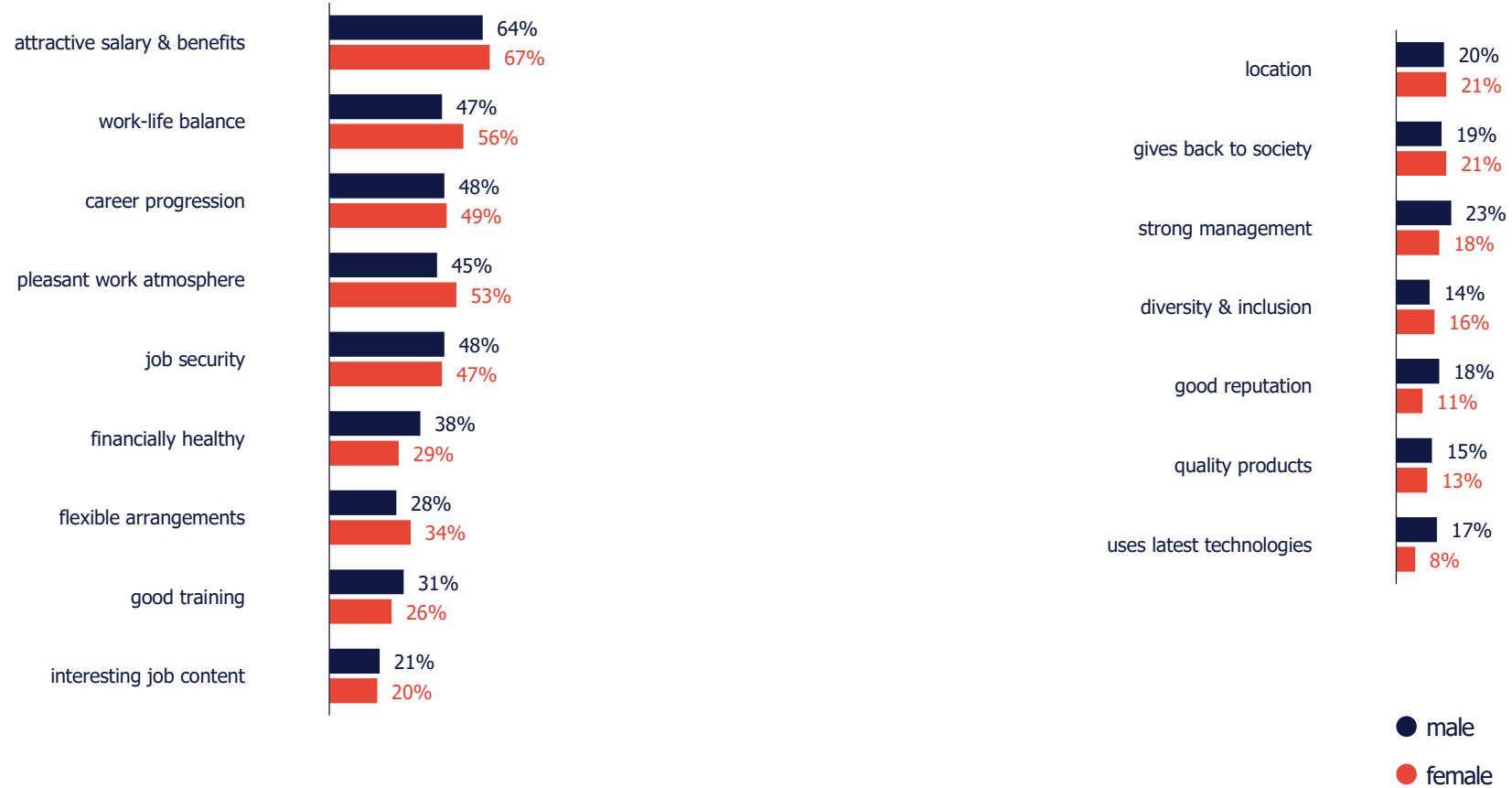
the most important criteria when choosing an employer.



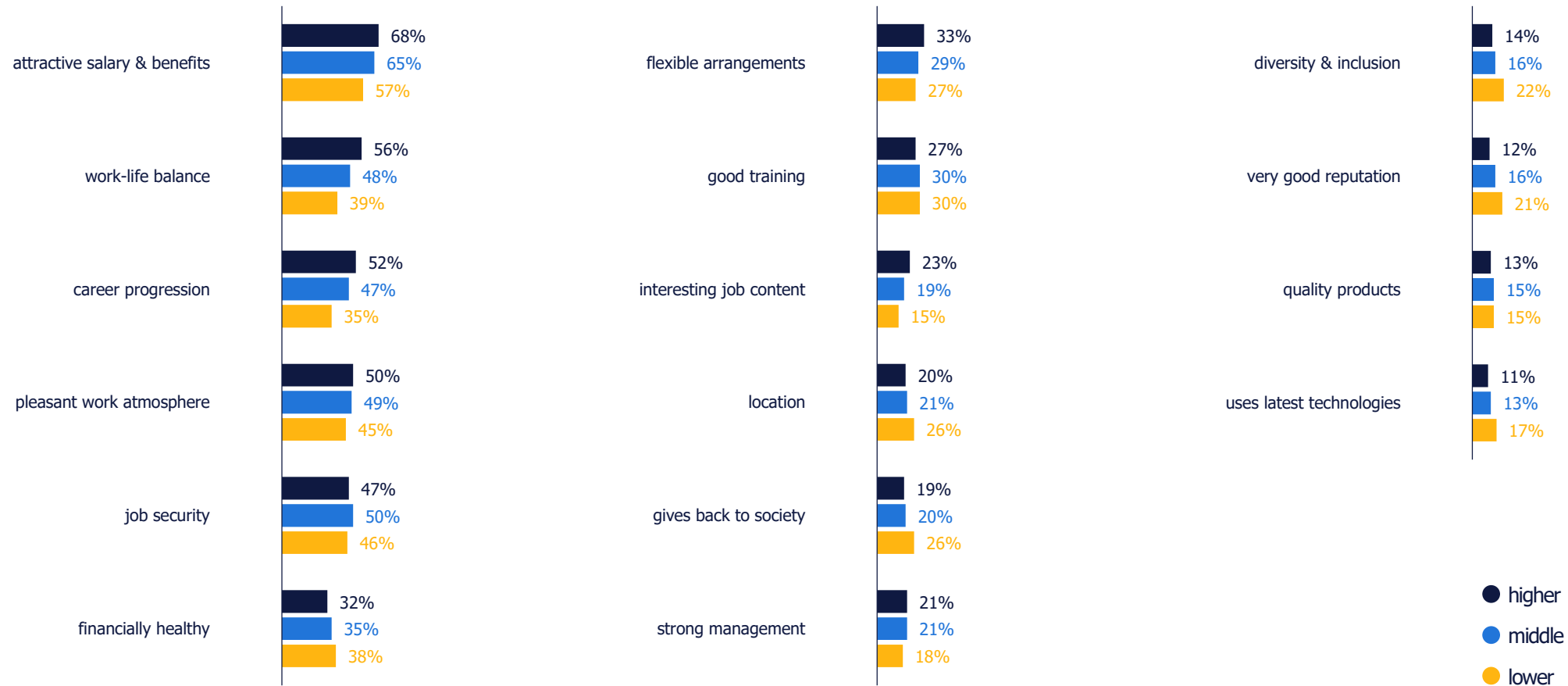
Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.



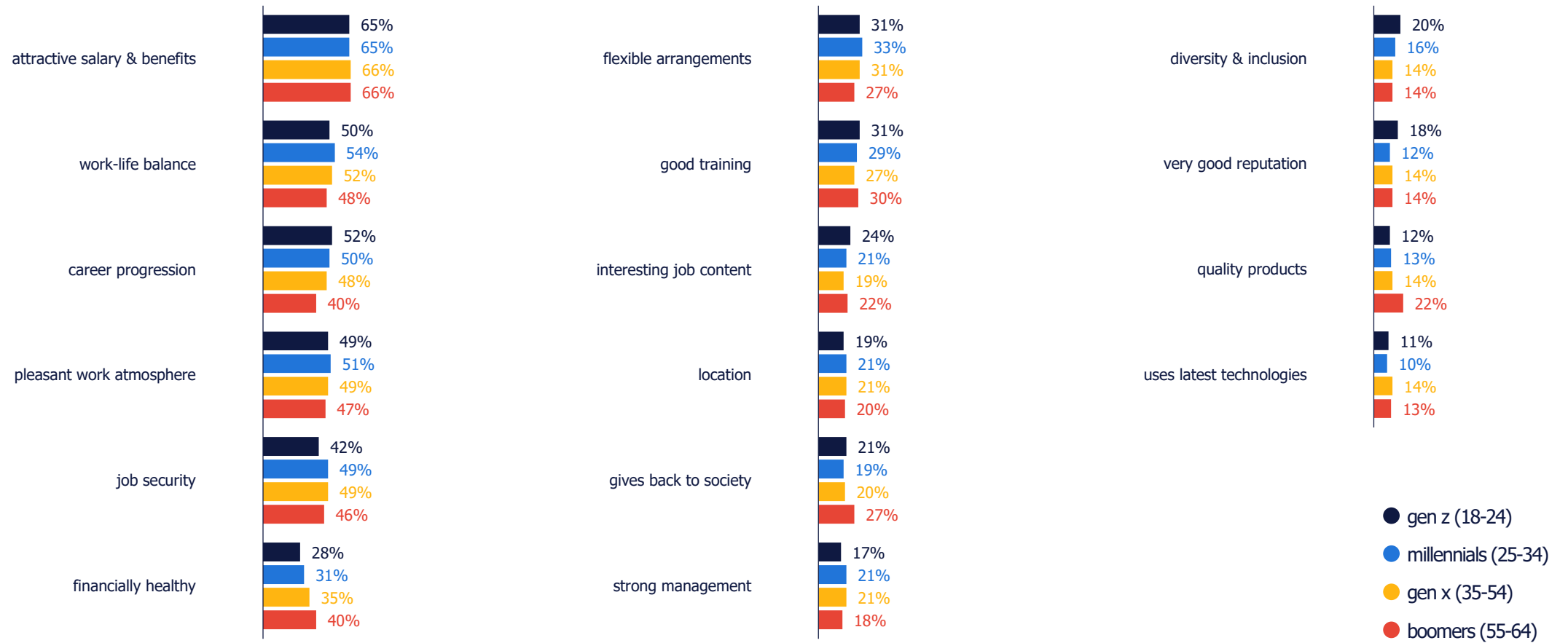
EVP driver importance by gender.



EVP driver importance by education.



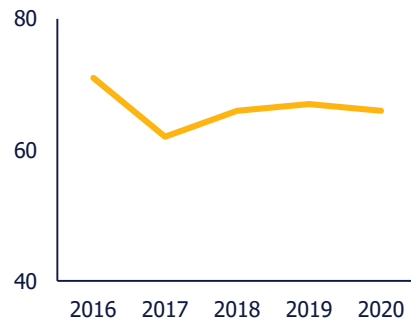
EVP driver importance by age.



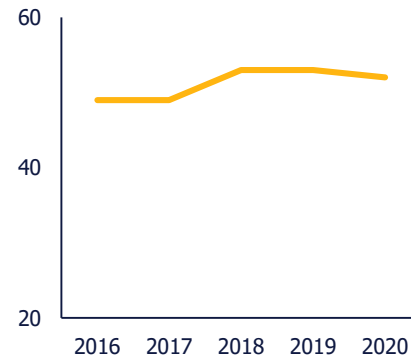
EVP driver importance trends, total.

1/2

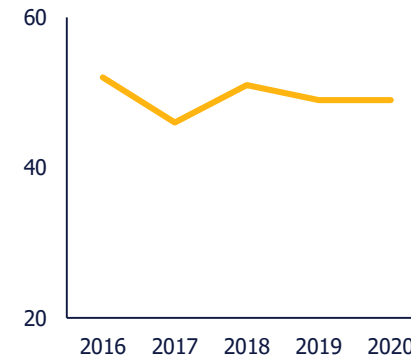
attractive salary & benefits



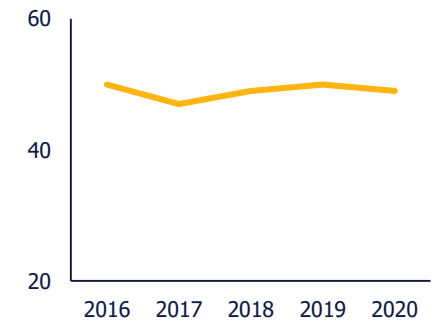
work-life balance



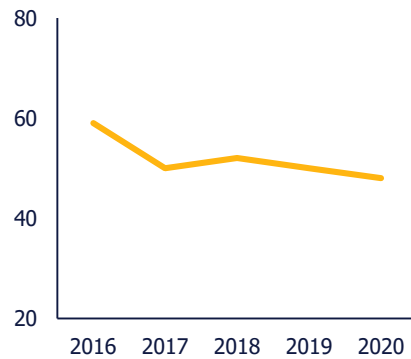
career progression



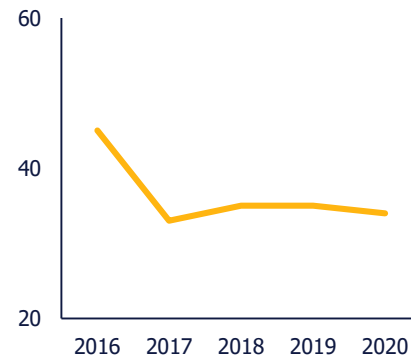
pleasant work atmosphere



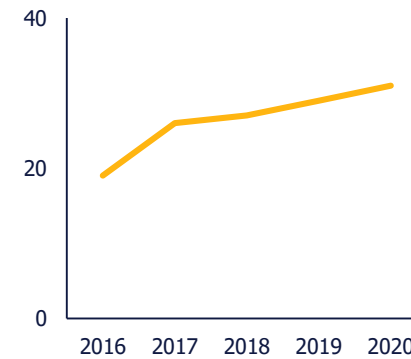
job security



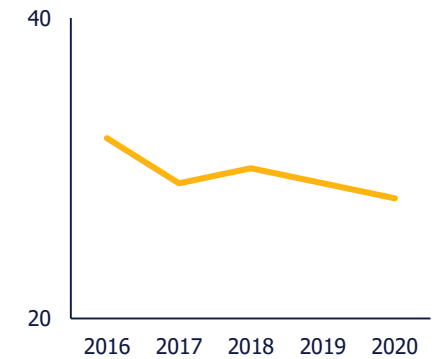
financially healthy



flexible arrangements



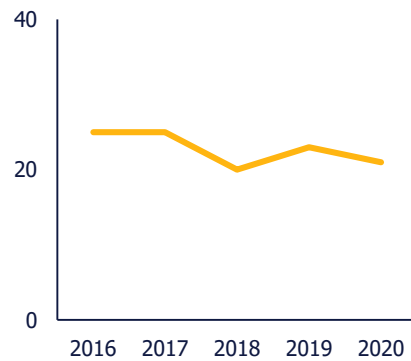
good training



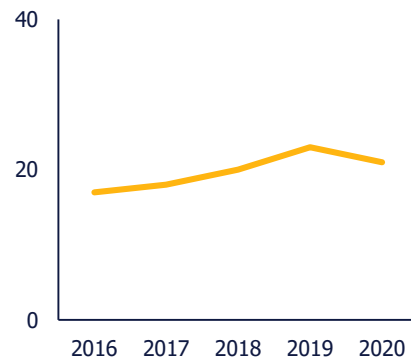
EVP driver importance trends, total.

2/2

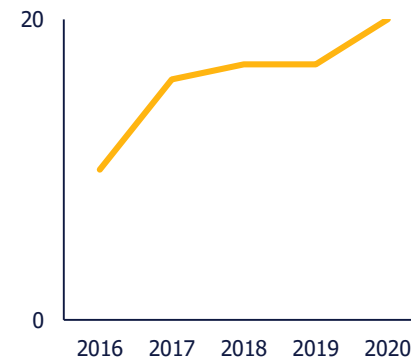
interesting job content*



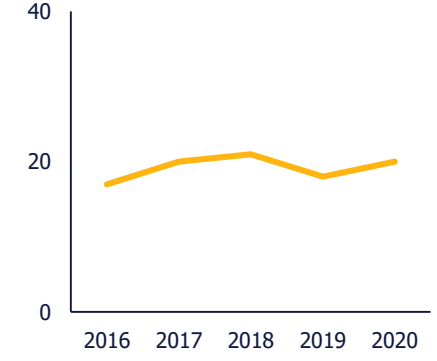
location



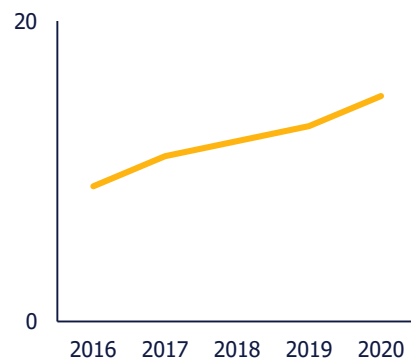
gives back to society



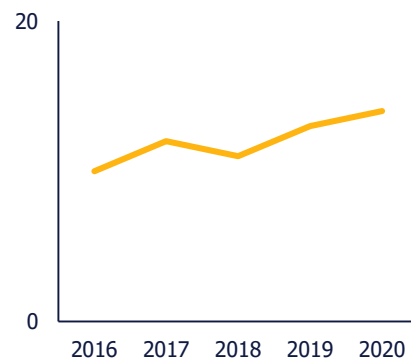
strong management



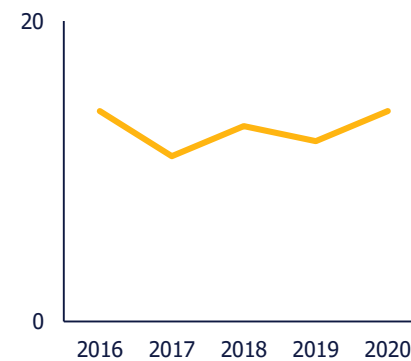
diversity & inclusion



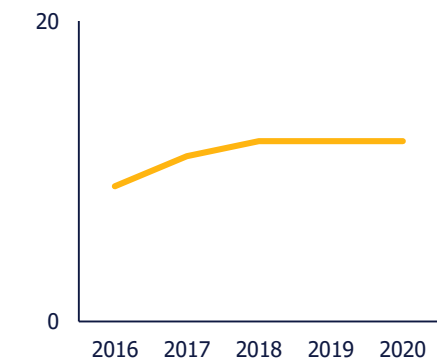
very good reputation*



quality products



uses latest technologies



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



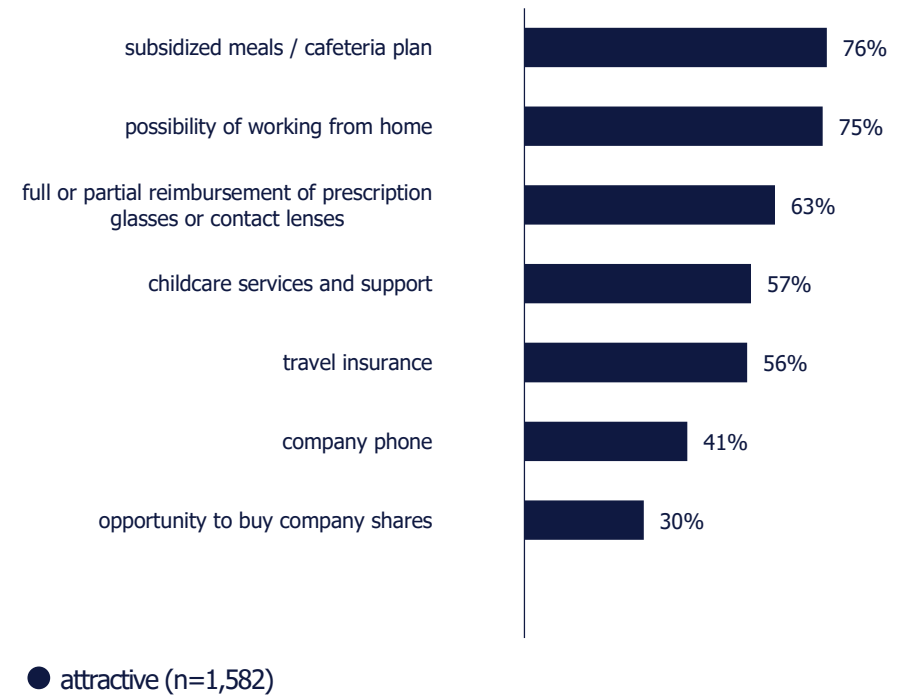
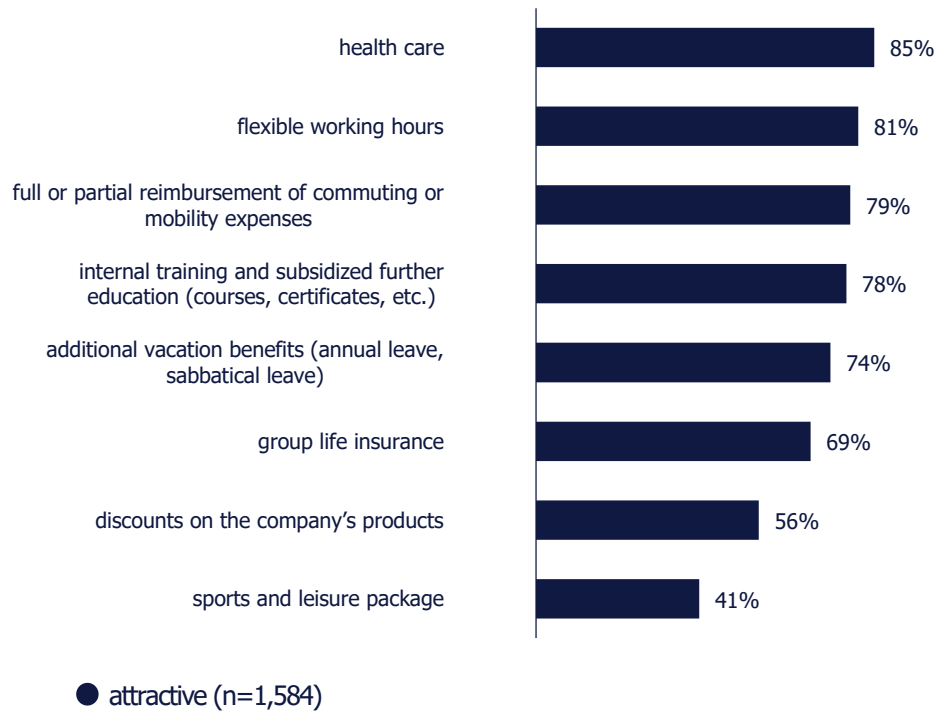
deep dive
employers



2020 employer
brand research.

employee benefits that portuguese find attractive.

attractive benefits

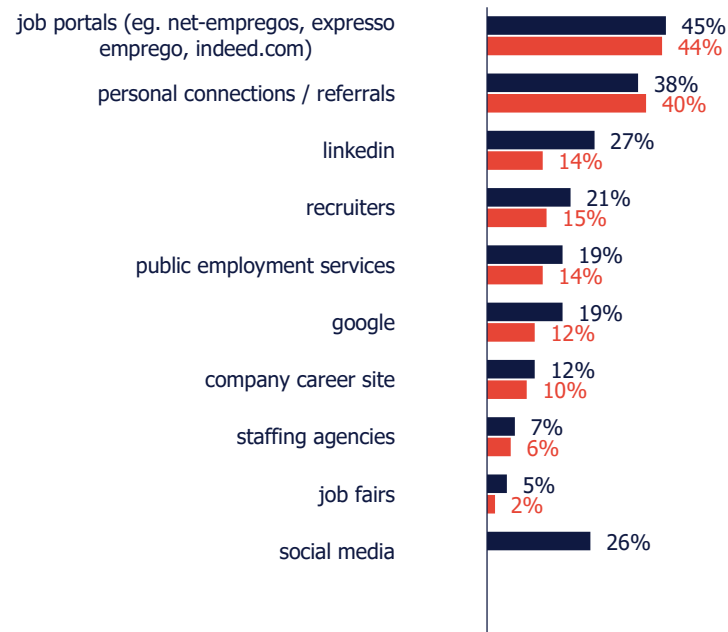


*the 15 benefits were shown randomly in two sets of 8 and 7 benefits, respectively, each set shown to 50% of the sample. For each bar chart, the base is respondents who are employed and received that particular set on the screen.

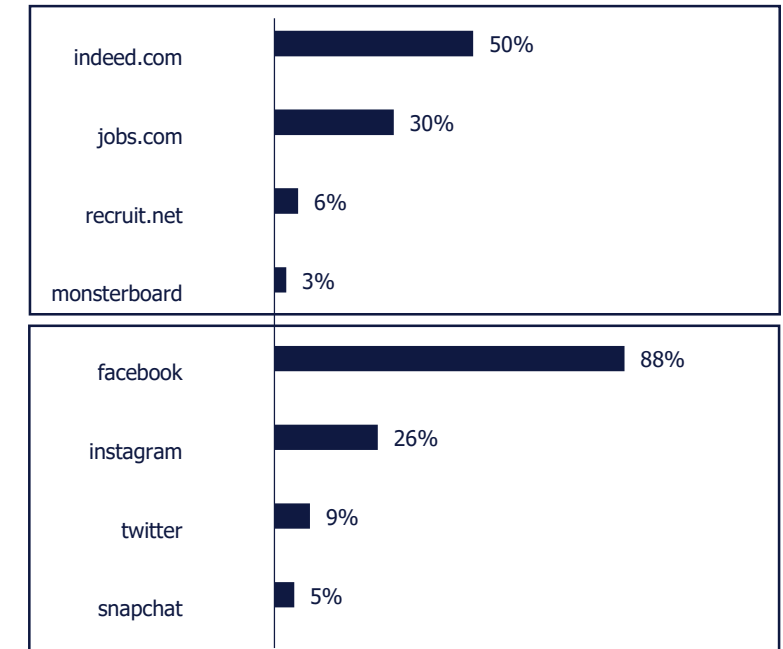


how do workers in portugal find new job opportunities.

channels used to find new job opportunities



channels used to find new job opportunities deep dive social media & job portals

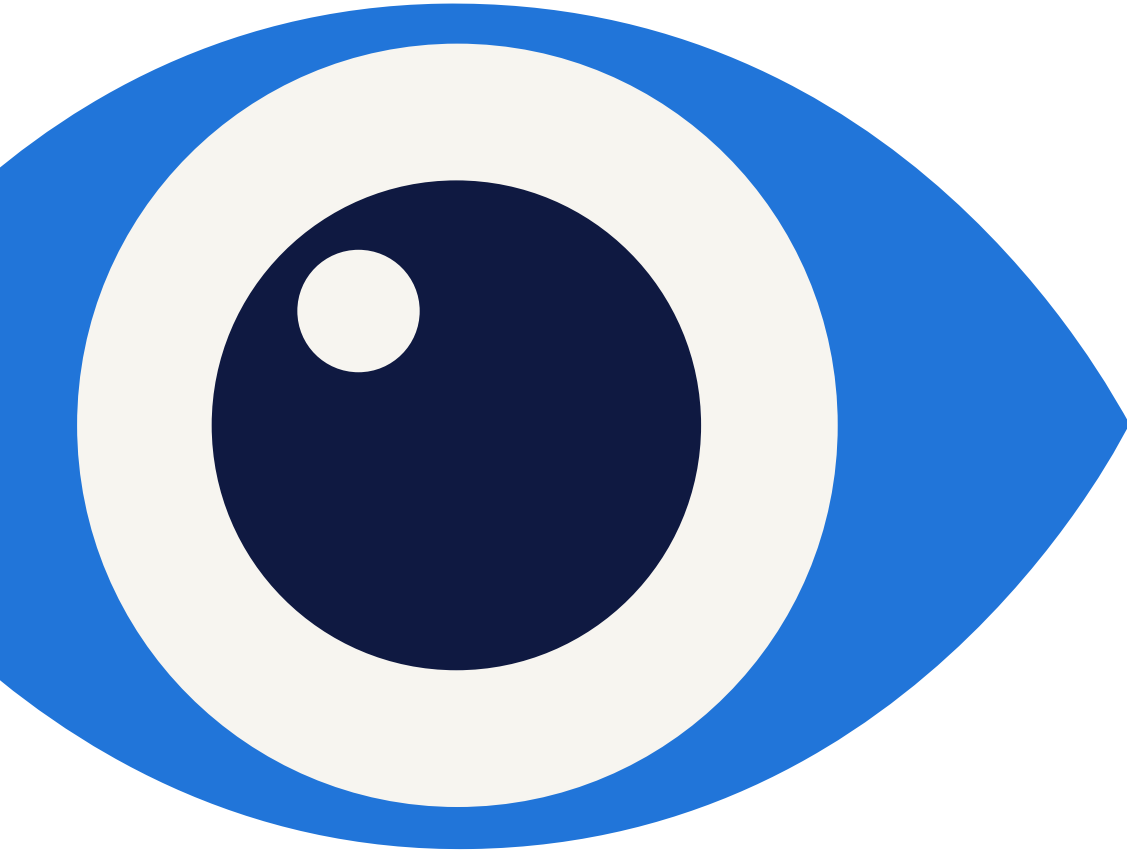


● 2020

● 2019



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.

employers in portugal are perceived to offer.

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

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

1/2

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



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

2/2

	top 3 EVP drivers		
sector	1	2	3
11 construction	financially healthy	uses latest technologies	job security
12 industry	financially healthy	very good reputation	uses latest technologies
13 retail	financially healthy	very good reputation	uses latest technologies
14 transportation	financially healthy	job security	uses latest technologies
15 restaurants & catering	financially healthy	very good reputation	uses latest technologies



methodology

2020 employer
brand research.



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

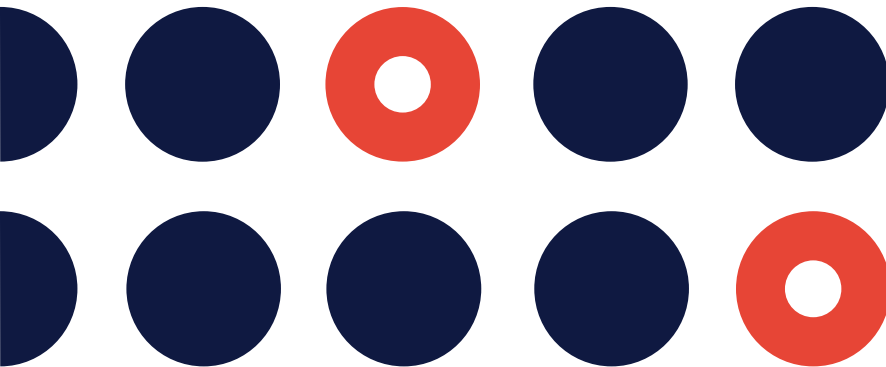
140 respondents have evaluated company X. Of these 140, 50% find the company nice to work for. Taking the error margin at $n=140/50\%$ into account, the real answer lies between 42% and 58%.

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).



source bibliography.

- 1 <https://hbr.org/2016/03/a-bad-reputation-costs-company-at-least-10-more-per-hire>
- 2 <https://www.betterteam.com/blog/employer-branding>
- 3 <https://www.slideshare.net/JWTINSIDE/culture-scape-1028-sm>
- 4 <https://www.pwc.com/gx/en/ceo-survey/2015/assets/pwc-18th-annual-global-ceo-survey-jan-2015.pdf>
- 5 <https://www.webershandwick.com/uploads/news/files/EmployerBrandCredibilityGap.pdf>
- 6 https://business.linkedin.com/content/dam/business/talent-solutions/global/en_us/c/pdfs/ultimate-list-of-employer-brand-stats.pdf
- 7 https://business.linkedin.com/content/dam/business/talent-solutions/global/en_us/job-switchers/PDF/job-switchers-global-report-english.pdf
- 8 <https://business.linkedin.com/talent-solutions/blog/2011/12/whats-the-value-of-your-employment-brand>
- 9 <https://www.webershandwick.com/uploads/news/files/EmployerBrandCredibilityGap.pdf>

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.

randstad portugal

Inês Veloso

iveloso@randstad.pt



randstad

human forward.

