employer brand research 2018
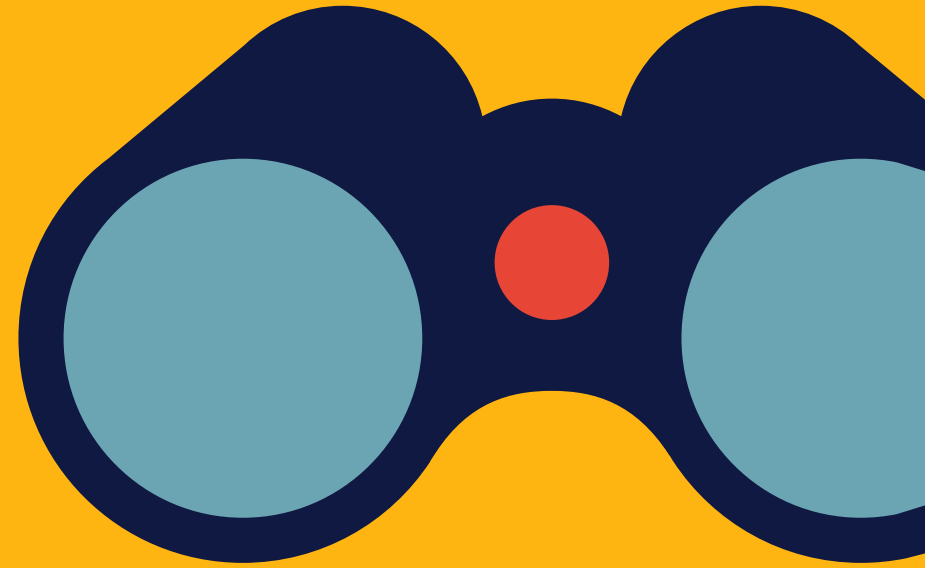
country report portugal.

randstad

human forward.

content.

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.[1]

50%
of candidates say they wouldn't work for a company with a bad reputation – even with a pay increase.[1]

80%
of workforce leaders agree that a strong employer brand has a significant impact on their ability to hire great workforce.[2] 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.

96%
agree that alignment of personal values with a company's culture is a key factor in their satisfaction working there.[3]

62%
of candidates research companies on social media before applying.[5]

88%
millennials and minorities agree that being part of the right company culture really matters to them.[3]

companies with bad reputations pay 10% more per hire.[4]

87%
joined a company specifically because of cultural fit.[3]

80%
have left a company specifically because of its culture.[3]

the employer brand roadmap.

audit current employer brand
- employer brand story
- external perception

interview employees and leaders to understand:
- their perception of your brand
- gaps and areas for improvement

assess competitors for workforce

external market analysis
- career motivations and drivers
- specific views of your company improvement

launch employer brand internally
- gain employee and leadership feedback

develop the employer brand strategy and creative assets

create the brand pillars and employee value proposition

activate employer brand externally

measure, assess and refine

what is the randstad employer brand research?

- **representative employer brand research** based on perceptions of the general audience. Optimizing 17 years of successful employer branding insights.

- **independent survey** with over 175,000 respondents in 30 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.

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

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

● countries surveyed

worldwide
• over 175,000 respondents
• 5,755 companies surveyed

sample
• aged 18 to 65
• representative on gender
• overrepresentated on age 25 – 44
• comprised of students, employed and unemployed workforce

country
• 6752 respondents

fieldwork
• online interviews
• between 29 november and 14 december 2017

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.

randomly assigned

the 30 companies shown to respondents are assigned randomly based on their awareness level registered in the previous year.

companies with a higher awareness are shown less often while companies with a lower awareness are shown more often. New companies are shown 1400 times for the first time they are researched.

number of evaluations

the smart sampling method ensures a mix between more and lesser known companies and also that the number of evaluations per company is between n=140 and n=400. This base is statistically robust for being able to draw generalized conclusions about the findings.
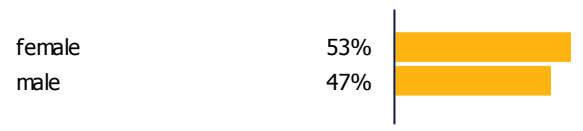
drivers

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
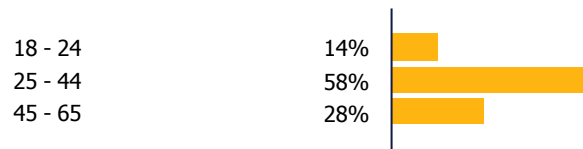
09 work-life balance

10 attractive salary and benefits

sample composition
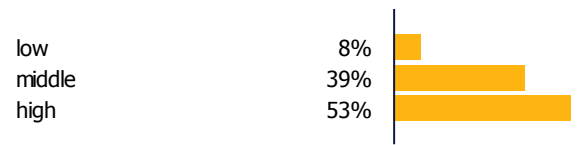## socio-demographics, employment situation, region.

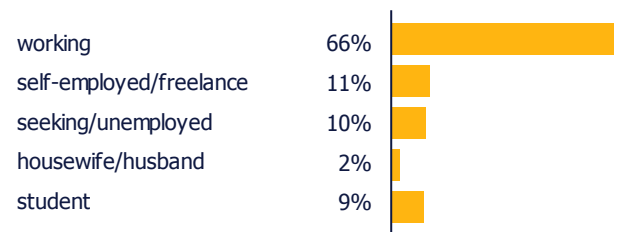### gender

female	53%	
male	47%	

age

18 - 24	14%	
25 - 44	58%	
45 - 65	28%	

education

low	8%	
middle	39%	
high	53%	

situation

working	66%	
self-employed/freelance	11%	
seeking/unemployed	10%	
housewife/husband	2%	
student	9%	

region

North	34%	
Centre	19%	
Lisbon	38%	
Alentejo	3%	
Algarve	3%	
Azores	1%	
Madeira	2%	
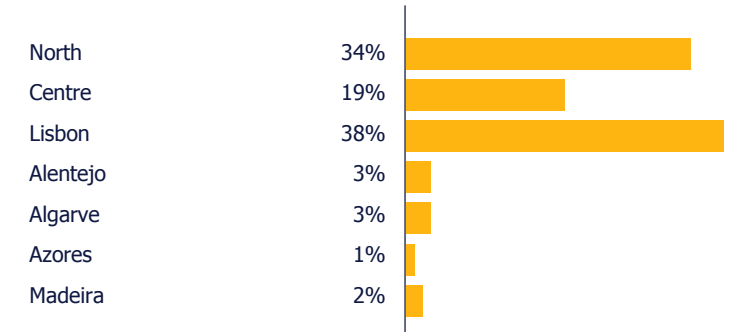
sample composition
sector, function.

sector

agriculture	1%
oil & gas	*
manufacturing	5%
electricity & gas supply	1%
water supply & sewage	1%
construction	4%
trade	8%
transportation & storage	3%
accommodation & food	3%
ICT	8%
finance & insurance	4%
real estate	1%
professional & scientific	7%
administration & support	8%
public administration	9%
education	10%
human health/social work	8%
arts & entertainment	2%
international organizations	1%
services	17%

function

managers	10%
professionals	27%
technicians	20%
clerks	22%
service/sales	9%
skilled agricultural	0%
craft/trade	2%
machine operators	2%
elementary occupations	4%
armed forces occupations	3%

base: currently employed (n= 5177)

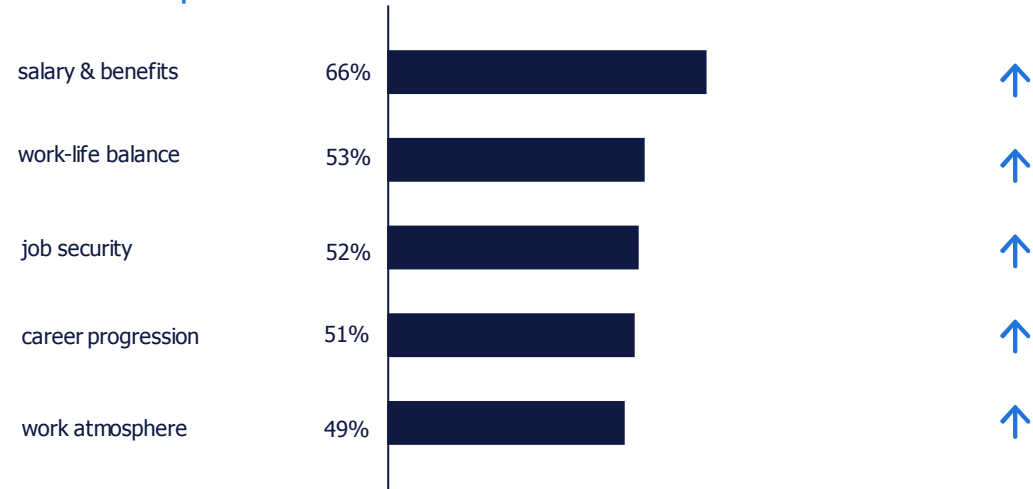* subgroup not present in sample

country
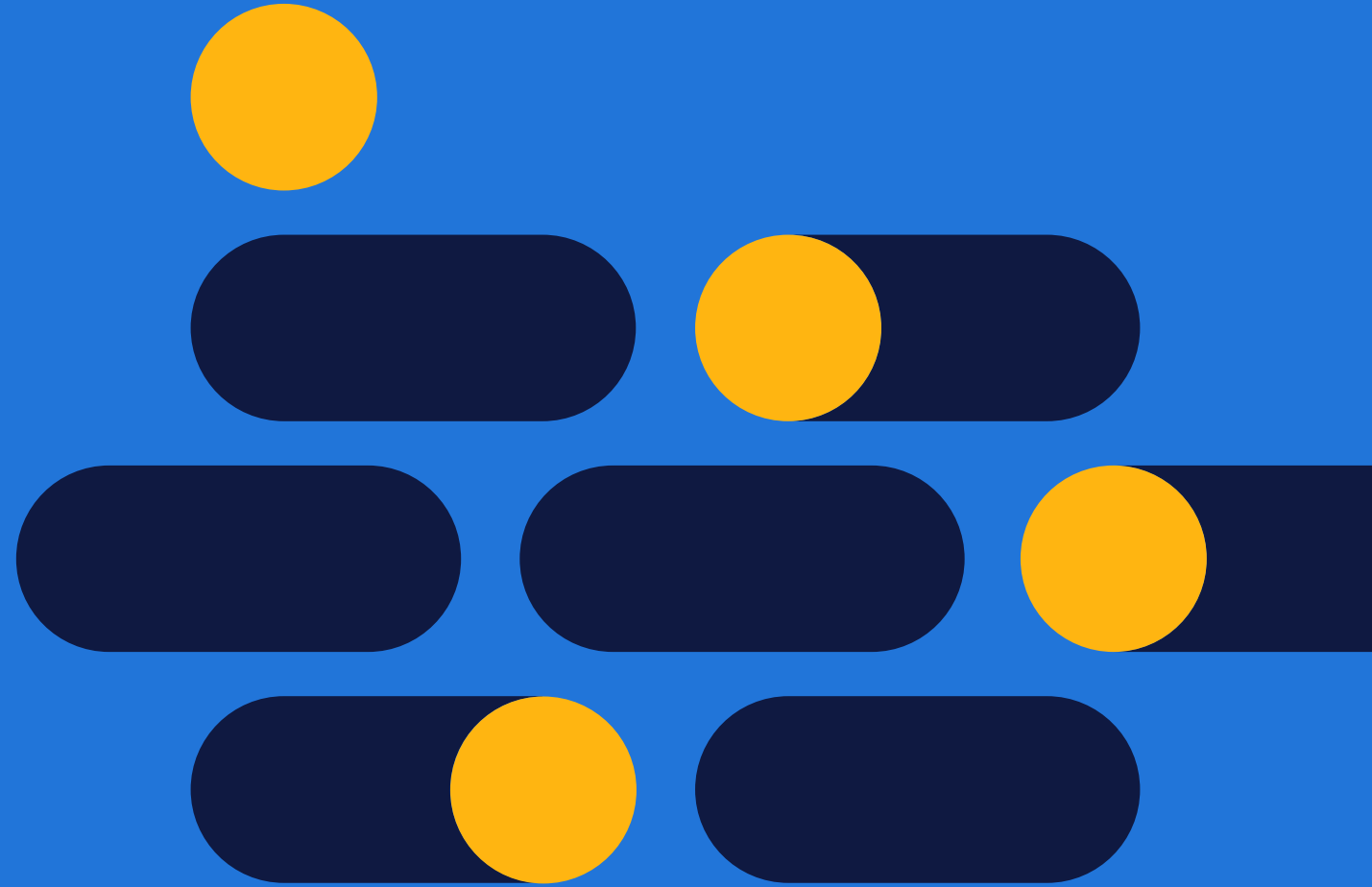
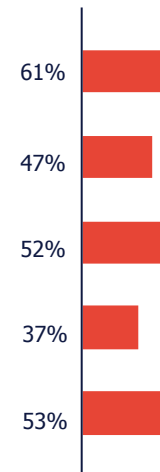## results.

what potential employees want
when choosing an employer.

5 most important criteria

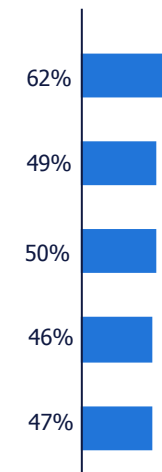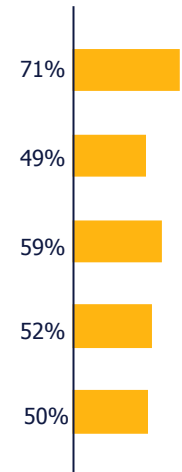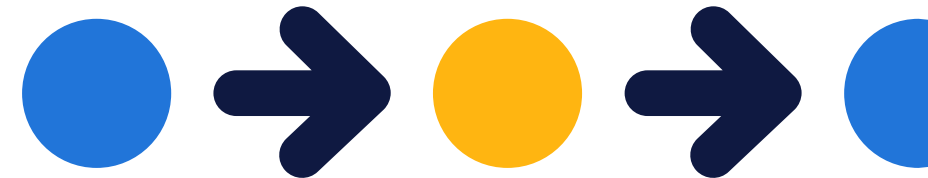|	versus 2017	EMEA	2017	2016
salary & benefits 66%	↑	61%	62%	71%
work-life balance 53%	↑	47%	49%	49%
job security 52%	↑	52%	50%	59%
career progression 51%	↑	37%	46%	52%
work atmosphere 49%	↑	53%	47%	50%

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

what do potential employees want
by socio-demographic profile.

men
66%
men find salary & benefits most important.

age 18 – 24
57%
workforce aged 18-24 considers career progression opportunities more important than workforce over 25.

age 25 – 44
69%
workforce aged 25-44 finds salary & benefits more important than workforce below 25 or over 44.

age 45 – 64
42%
workforce aged 45-64 believes financial health is more important than workforce under 45.

women
57%
women place more value than men on a good work-life balance.

higher educated
57%
higher educated workforce finds good work-life balance more important than middle or lower educated workforce.

middle educated
49%
middle educated workforce finds career progression opportunities more important compared to lower educated.
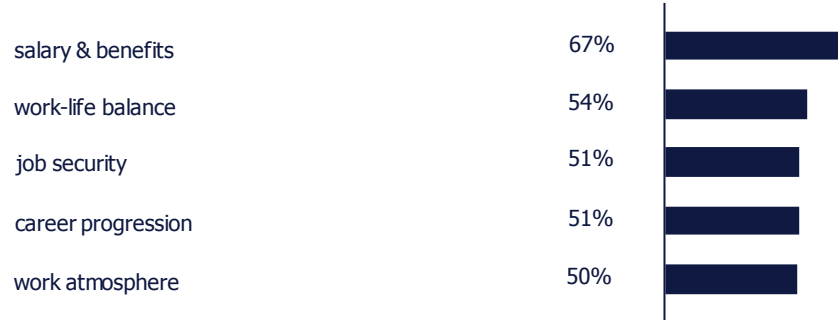
lower educated
59%
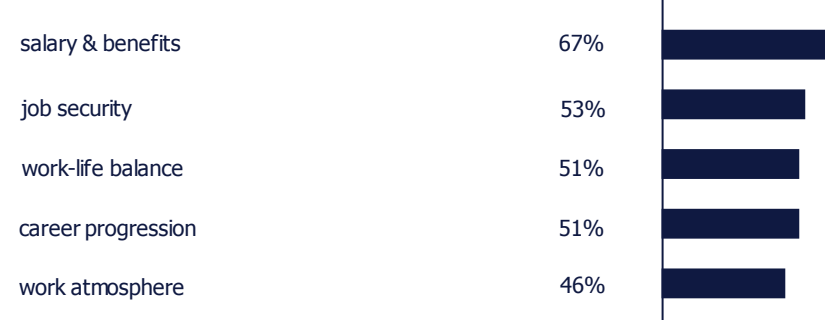lower educated workforce finds salary & benefits most important.

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

what do potential employees want
top 5 by job category and industry.

white collar workers

salary & benefits	67%
work-life balance	54%
job security	51%
career progression	51%
work atmosphere	50%

blue collar workers

salary & benefits	67%
job security	53%
work-life balance	51%
career progression	51%
work atmosphere	46%

information and communication

salary & benefits	67%
work atmosphere	53%
work-life balance	49%
career progression	48%
job security	45%

base: n=405

administrative and support service activities

salary & benefits	66%
job security	54%
work atmosphere	51%
work-life balance	50%
career progression	48%
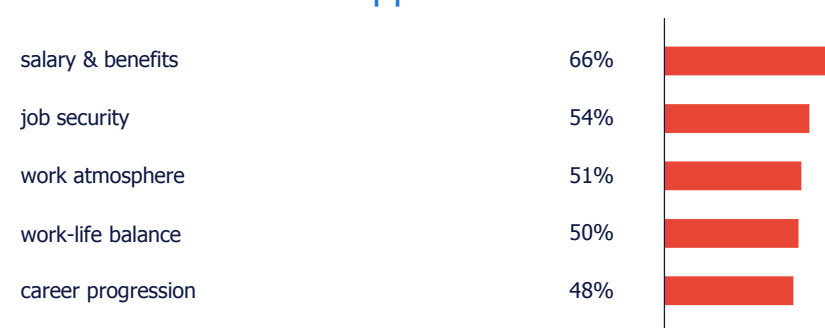
base: n=389

employee - employer exchange in portugal and the region.

a gap between what employees seek and what employers offer is a valuable opportunity for your EVP.

employees in portugal seek	employers in portugal offer	employers in EMEA offer	gap top 3
1 salary & benefits	1 financially healthy	1 financially healthy	1 salary & benefits
2 work-life balance	2 uses latest technologies	2 uses latest technologies	2 work-life balance
3 job security	3 very good reputation	3 very good reputation	3 job security
4 career progression	4 job security	4 job security	
5 pleasant work atmosphere	5 career progression	5 career progression	
6 financially healthy	6 pleasant work atmosphere	6 interesting job content	
7 interesting job cob content	7 interesting job content	7 salary & benefits	
8 giving back to society	8 attractive salary & benefits	8 pleasant work atmosphere	
9 uses latest technologies	9 work-life balance	9 work-life balance	
10 very good reputation	10 giving back to society	10 giving back to society	

how do the portuguese look for jobs.

15%
changed employer in the last year.

27%
plan to change employer within the next year.

top 5 channels used to look for a job

channel	plan to change employer	changed employer
job boards (eg. monster)	83%	82%
personal connections / referrals	58%	58%
recruiters (agencies/headhunters)	52%	54%
public employment services (pes)	47%	48%
linkedin	45%	42%

● plan to change employer   ● changed employer
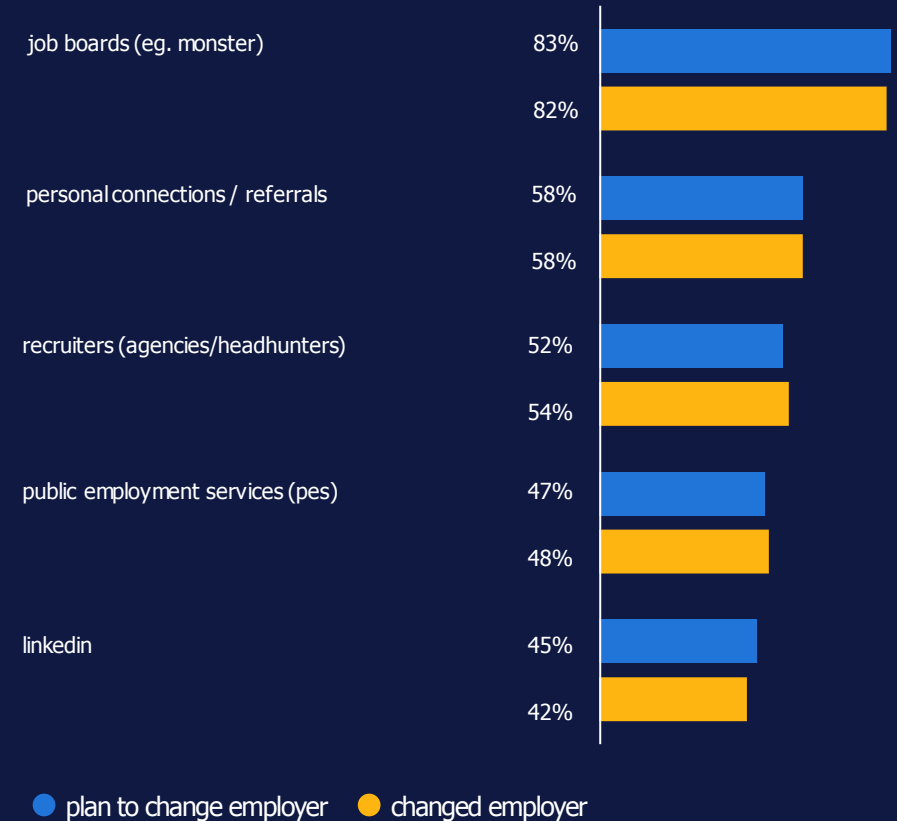
how do the portuguese look for jobs
channels used to find new job opportunities, by profile.

men

68%

men are most likely to use job boards when looking for a job.

age 18 – 24

51%

workforce aged 18-24 is more likely to use google when looking for a job compared to workforce over 24.

age 25 – 44

75%

workforce aged 25-44 is more likely to use job boards than workforce ages below 25 and over 44.

age 45 – 64

61%

workforce aged 45-64 is more likely to use personal connections when looking for a job when compared to workforce under 45.

women

77%

women are more likely than men to use job boards when looking for a job.

higher educated

75%

higher educated workforce is most likely to use job boards when looking for a job.

middle educated

45%

middle educated workforce is more likely than lower educated to use recruiters when looking for a job.
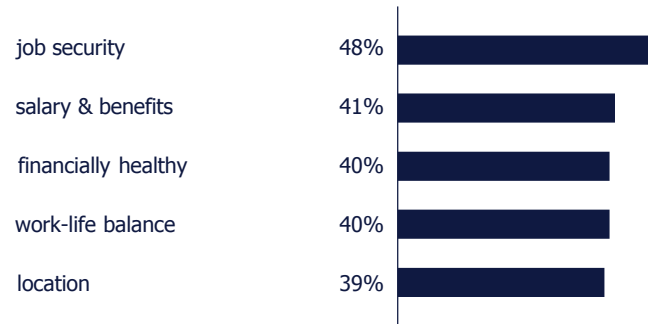
lower educated

49%

lower educated workforce is more likely than higher educated to use public employment services when looking for a job.
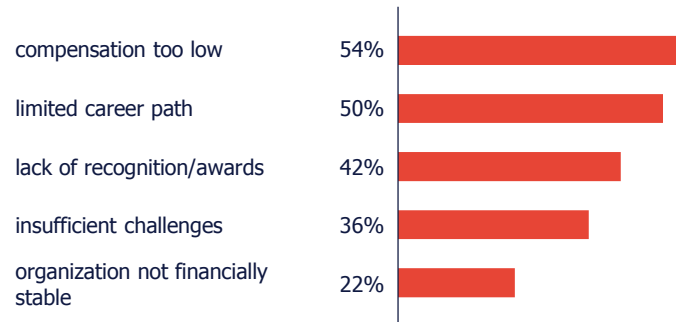
what factors do the portuguese stay or leave for.

top 5 reasons to stay*

job security	48%
salary & benefits	41%
financially healthy	40%
work-life balance	40%
location	39%

top 5 reasons to leave**

compensation too low	54%
limited career path	50%
lack of recognition/awards	42%
insufficient challenges	36%
organization not financially stable	22%

*of the respondents who said they stayed with the same employer for the past year and who do not plan to leave in the coming year

** of the respondents who said they changed employers in the past year or plan to do so in the coming year

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

men

43%

men are more likely than women to stay with their current employer if the company is financially healthy.

women

42%

women are more likely than men to stay with their employer if they get the opportunity to a good work-life balance.

age 18 – 24

35%

workforce aged 18-24 is more likely to stay with their employer for career opportunities, compared to workforce over 25.

higher educated

43%

higher educated workforce is more likely to stay with their employer if they get the opportunity to a good work-life balance compared to workforce lower and middle educated.

age 25 – 44

40%

workforce aged 25-44 is more likely to stay with an employer for a pleasant work atmosphere, when compared to workforce under 25 or over 44.

middle educated

42%

middle educated workforce is more likely than higher educated to stay with their employer when the company is financially healthy.

age 45 – 64

44%

workforce aged 45-64 is more likely to stay with an employer when the company is financially healthy than workforce under 45.

lower educated

47%

lower educated workforce is most likely to stay with an employer if they have a sense of job security.

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

men

53%

men are more likely than women to leave their current employer because of a lack of growth opportunities.

age 18 – 24

53%

workforce aged 18-24 is most likely to leave their employer because of low compensation compared to other companies.

age 25 – 44

46%

workforce aged 25-44 is more likely to leave because they lack recognition or awards than workforce below 25 or over 44.

age 45 – 64

27%

workforce aged 45-64 is more likely to leave because of the financial health of the company than workforce below 45.

women

53%

women are most likely to leave their employer because of low compensation compared to other companies.

higher educated

39%

higher educated workforce is more likely to leave than low and middle educated workforce because of a lack of challenges.
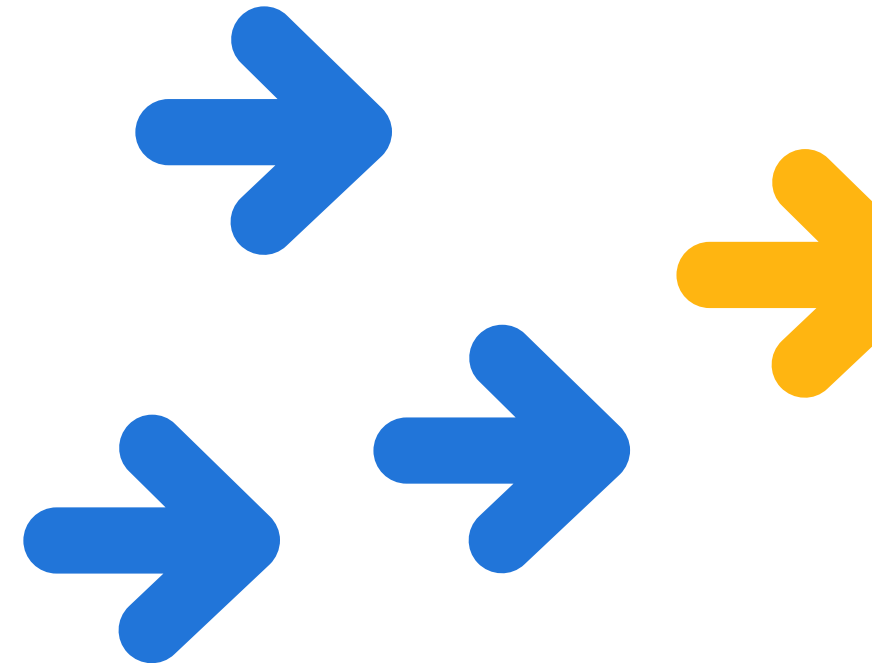
middle educated

49%

middle educated workforce is more likely to leave compared to lower educated because of a lack of growth opportunities.

lower educated

60%

lower educated workforce is most likely to leave because of low compensation compared to other companies.

actions the portuguese take in order to stay employable.

top 5

I am sociable with colleagues, superiors and my professional network — 61%

I am open and flexible to change — 58%

I keep my skills up to date by trainings, courses etc. — 50%

I am willing to accept flexible working hours — 40%

I keep up to date with the latest industry news — 36%

actions portuguese take in order to stay employable
staying engaged as an employee, by profile.

men

41%

men are more likely than women to adopt the latest techniques and technologies.

age 18 – 24

43%

workforce aged 18-24 is slightly more likely to accept flexible working hours compared to workforce aged 25-44.

age 25 – 44

63%

workforce aged 25-44 is more likely to be sociable with colleagues, superiors and their professional network than workforce aged 18-24.

age 45 – 64

54%

workforce aged 45-64 is slightly more likely to keep their skills up to date by trainings, courses etc. than workforce below 45.

women

63%

women are most likely to be sociable with colleagues, superiors and their professional network.

higher educated

56%

higher educated workforce is more likely than the lower or middle educated workforce to keep their skills up to date by trainings, courses etc.

middle educated

45%

middle educated workforce is more likely than lower educated to keep up to date with the latest industry news.

lower educated

58%

lower educated workforce is most likely to be sociable with colleagues, superiors and their professional network.

sector

insights.

top performing sectors in portugal
by awareness and attractiveness.

high

healthcare

aviation

IT and consulting

tourism, accomodation & leisure

banking

plastic

food & drinks

energy

steel

industrial

automotive

construction

media & telecom

maintenance

retail

HR

textile

transportation

insurance

restaurants & catering

low

attractiveness

low   awareness   high

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.

top 3 sectors in portugal
by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	IT and consulting	healthcare	aviation
career progression	IT and consulting	healthcare	aviation
financially healthy	healthcare	IT and consulting	food & drinks
gives back to society	healthcare	maintenance	energy
interesting job content	healthcare	IT and consulting	aviation
job security	healthcare	IT and consulting	energy
pleasant working atmosphere	healthcare	IT and consulting	tourism, accomodation & leisure
uses latest technologies	IT and consulting	healthcare	media & telecom
good reputation	healthcare	IT and consulting	tourism, accomodation & leisure
work-life balance	healthcare	IT and consulting	plastic

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

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

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

top 3 EVP drivers

sector	1	2	3
11 media & telecom	uses latest technologies	financially healthy	good reputation
12 steel	financially healthy	good reputation	uses latest technologies
13 construction	uses latest technologies	financially healthy	good reputation
14 maintenance	financially healthy	good reputation	uses latest technologies
15 retail	financially healthy	good reputation	uses latest technologies
16 HR	financially healthy	uses latest technologies	good reputation
17 transportation	financially healthy	job security	good reputation
18 textile	good reputation	financially healthy	uses latest technologies
19 insurance	financially healthy	good reputation	uses latest technologies
20 restaurants & catering	financially healthy	uses latest technologies	good reputation

top

employers.

top employers in portugal.

top 10 employers 2018

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

top 10 employers 2017

01 Microsoft

02 Delta Cafés

03 TAP - Transportes Aéreos Portugueses

04 Nestlé

05 THE NAVIGATOR COMPANY

06 RTP - RÁDIO E TELEVISÃO DE PORTUGAL

07 HOVIONE FARMACIÊNCIA

08 ANA - AEROPORTOS DE PORTUGAL

09 Siemens

10 OGMA - INDÚSTRIA AERONÁUTICA DE PORTUGAL

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

top 5 companies	top 3 EVP drivers		
	1	2	3
1 Microsoft	financially healthy	uses latest technologies	very good reputation
2 HOVIONE FARMACIÊNCIA	financially healthy	uses latest technologies	very good reputation
3 TAP - Transportes Aéreos Portugueses	uses latest technologies	interesting job content	very good reputation
4 Nestlé	financially healthy	very good reputation	uses latest technologies
5 ANA - AEROPORTOS DE PORTUGAL	uses latest technologies	financially healthy	interesting job content

top employers
by EVP driver.

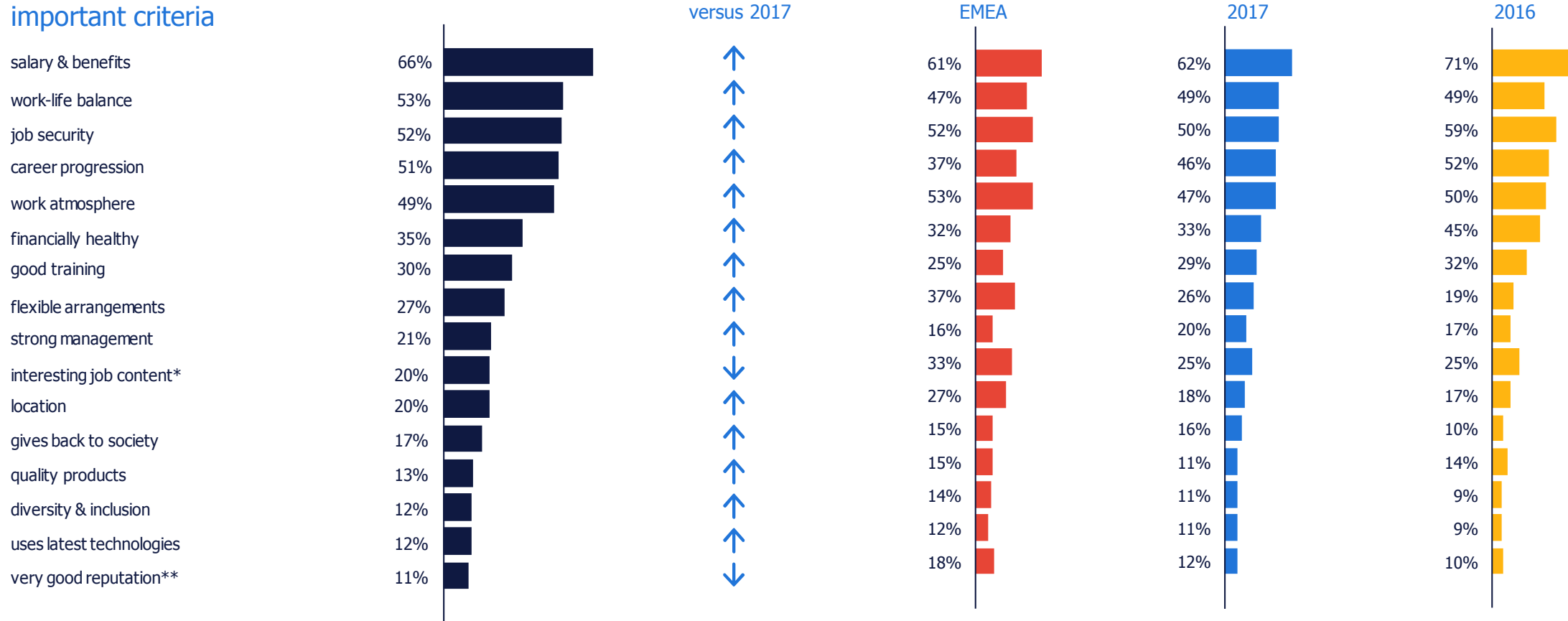| EVP driver	1	2	3
attractive salary & benefits	Microsoft	Banco de Portugal	SPANISH CRUISE SERVICES N.V.
career progression	Microsoft	Deloitte	HOVIONE FARMACIÊNCIA
financially healthy	Microsoft	Sonae	Nestlé
gives back to society	SUMA - SERVIÇOS URBANOS E MEIO AMBIENTE	Microsoft	Delta Cafés
interesting job content	Microsoft	SPANISH CRUISE SERVICES N.V.	RTP - RÁDIO E TELEVISÃO DE PORTUGAL
job security	Microsoft	Banco de Portugal	Delta Cafés
pleasant work atmosphere	Microsoft	Delta Cafés	SPANISH CRUISE SERVICES N.V.
uses latest technologies	Microsoft	Siemens	FUJITSU TECHNOLOGY SOLUTIONS
very good reputation	Microsoft	Delta Cafés	Nestlé
work-life balance	Microsoft	Delta Cafés	Nestlé

deep dive

appendix 1.

what potential employees want
the most important criteria when choosing an employer.

important criteria   versus 2017   EMEA   2017   2016

criteria	%	vs 2017	EMEA	2017	2016
salary & benefits	66%	↑	61%	62%	71%
work-life balance	53%	↑	47%	49%	49%
job security	52%	↑	52%	50%	59%
career progression	51%	↑	37%	46%	52%
work atmosphere	49%	↑	53%	47%	50%
financially healthy	35%	↑	32%	33%	45%
good training	30%	↑	25%	29%	32%
flexible arrangements	27%	↑	37%	26%	19%
strong management	21%	↑	16%	20%	17%
interesting job content*	20%	↓	33%	25%	25%
location	20%	↑	27%	18%	17%
gives back to society	17%	↑	15%	16%	10%
quality products	13%	↑	15%	11%	14%
diversity & inclusion	12%	↑	14%	11%	9%
uses latest technologies	12%	↑	12%	11%	9%
very good reputation**	11%	↓	18%	12%	10%

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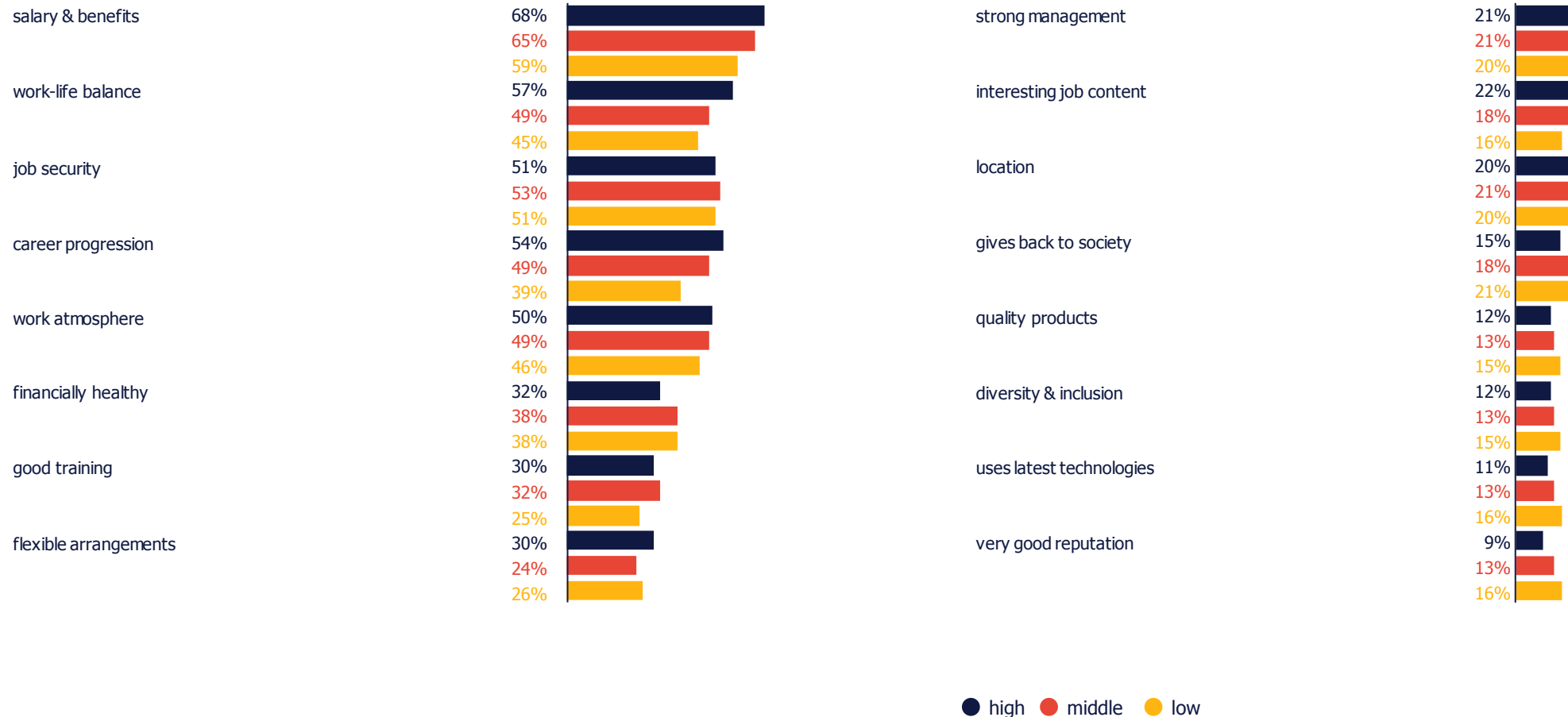
*2017: work that is stimulating and challenging/ **previous years: strong image/strong values

EVP driver importance
by gender.

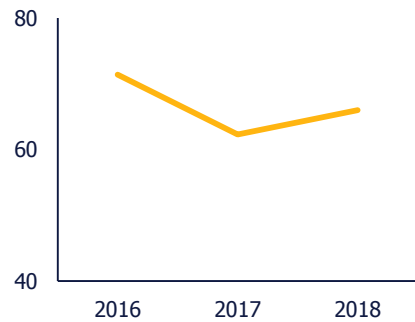| driver	male	female
salary & benefits	66%	66%
work-life balance	48%	57%
job security	51%	52%
career progression	51%	51%
work atmosphere	47%	52%
financially healthy	38%	32%
good training	31%	30%
flexible arrangements	24%	30%
strong management	23%	19%

driver	male	female
interesting job content	20%	20%
location	20%	20%
gives back to society	17%	17%
quality products	13%	12%
diversity & inclusion	12%	13%
uses latest technologies	17%	9%
very good reputation	14%	9%

● male   ● female

EVP driver importance
by education.

	high	middle	low
salary & benefits	68%	65%	59%
work-life balance	57%	49%	45%
job security	51%	53%	51%
career progression	54%	49%	39%
work atmosphere	50%	49%	46%
financially healthy	32%	38%	38%
good training	30%	32%	25%
flexible arrangements	30%	24%	26%

	high	middle	low
strong management	21%	21%	20%
interesting job content	22%	18%	16%
location	20%	21%	20%
gives back to society	15%	18%	21%
quality products	12%	13%	15%
diversity & inclusion	12%	13%	15%
uses latest technologies	11%	13%	16%
very good reputation	9%	13%	16%

● high ● middle ● low

EVP driver importance
by age.

	45+	25 - 44	18 - 24
salary & benefits	63%	69%	64%
work-life balance	48%	56%	50%
job security	49%	53%	49%
career progression	47%	52%	57%
work atmosphere	44%	52%	51%
financially healthy	42%	33%	28%
good training	30%	30%	33%
flexible arrangements	25%	28%	30%

	45+	25 - 44	18 - 24
strong management	22%	20%	21%
interesting job content	21%	19%	24%
location	20%	21%	17%
gives back to society	20%	15%	18%
quality products	15%	12%	12%
diversity & inclusion	14%	11%	15%
uses latest technologies	14%	12%	11%
very good reputation	12%	10%	13%

● 45+   ● 25 - 44   ● 18 - 24

EVP driver importance trends, total.

1/2

salary and benefits

work atmosphere
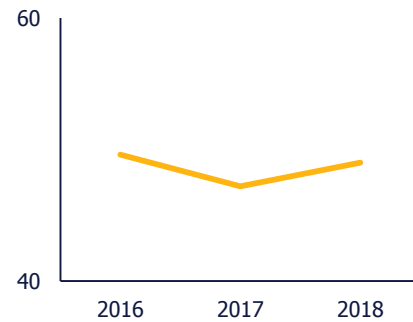
job security
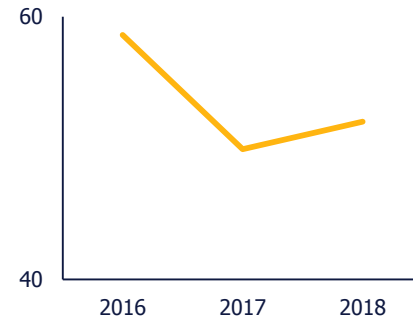
work-life balance
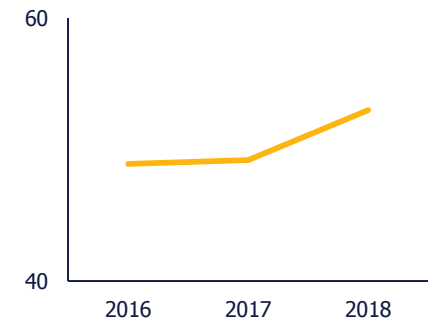
interesting job content
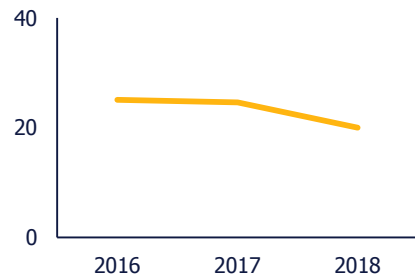
financially healthy
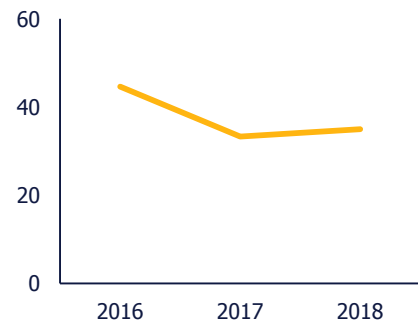
flexible arrangements
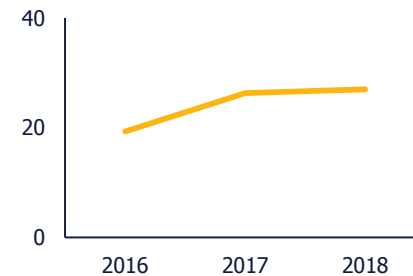
location
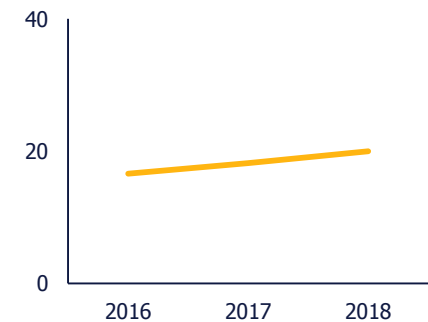
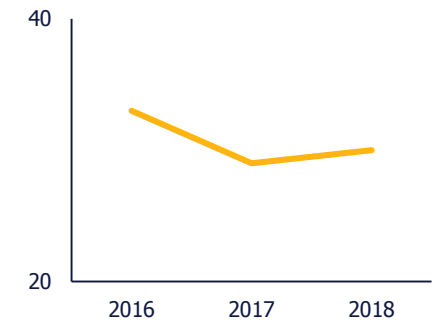# EVP driver importance
trends, total.

2/2

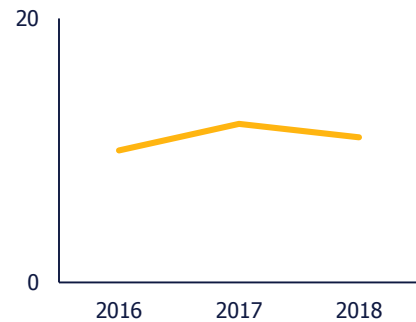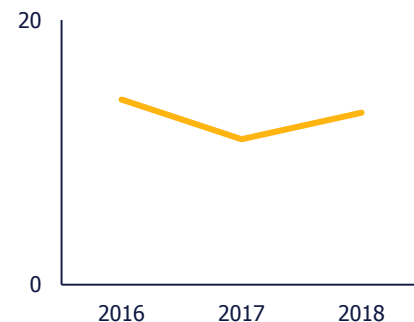### strong management
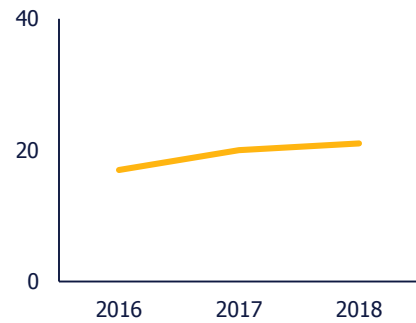
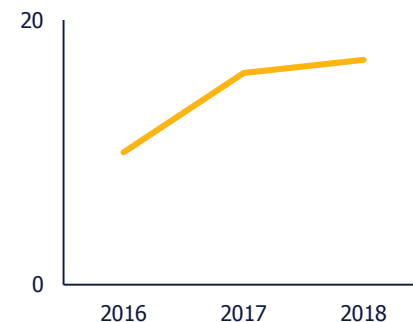### career progression
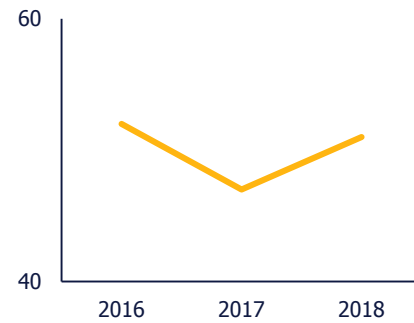
diversity & inclusion
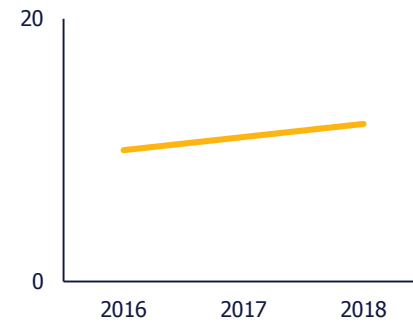
good training

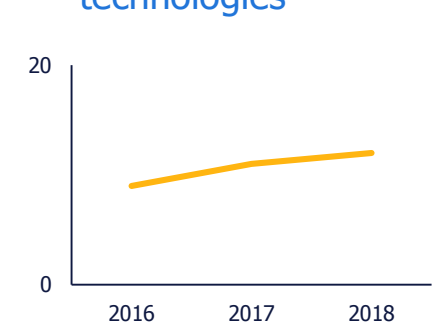### very good reputation

quality products

gives back to society

uses latest technologies

methodology

appendix 2.

methodology
why smart sampling?

In the past, companies were evaluated by 140 to 1400 respondents. Having analysed the data and error margins, it was concluded that a large sample was not necessary when reliable data can also be obtained with a smaller sample size. Therefore, 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 Betterteam Blog
https://www.betterteam.com/blog/employer-branding

2 PwC, A marketplace without boundaries? Responding to disruption
https://www.pwc.com/gx/en/ceo-survey/2015/assets/pwc-18th-annual-global-ceo-survey-jan-2015.pdf

3 JWTInside, "The Evolving Culture-scape and Employee Expectation"
Research Study 2014, High Performance Employees
https://www.slideshare.net/JWTINSIDE/culture-scape-1028-sm

4 Harvard Business Review, A Bad Reputation Costs a Company at
Least 10% More Per Hire
https://hbr.org/2016/03/a-bad-reputation-costs-company-at-least-10-more-per-hire

5 HR in Asia, Do You Think Your Employer Brand Can Be Ruined by
Social Media?
www.hrinasia.com/employer-branding/do-you-think-your-employer-brand-can-be-ruined-by-social-media/

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
- Ipient 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.