

employer brand research 2019



country report spain.

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.¹

50%

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

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.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.

70%

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

62%

of candidates research companies on social media before applying.⁵



Companies with bad reputations pay 10% more per hire.⁴

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.⁶

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.⁷

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



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

- 10,939 respondents

fieldwork

- online interviews
- between 15 and 23 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.

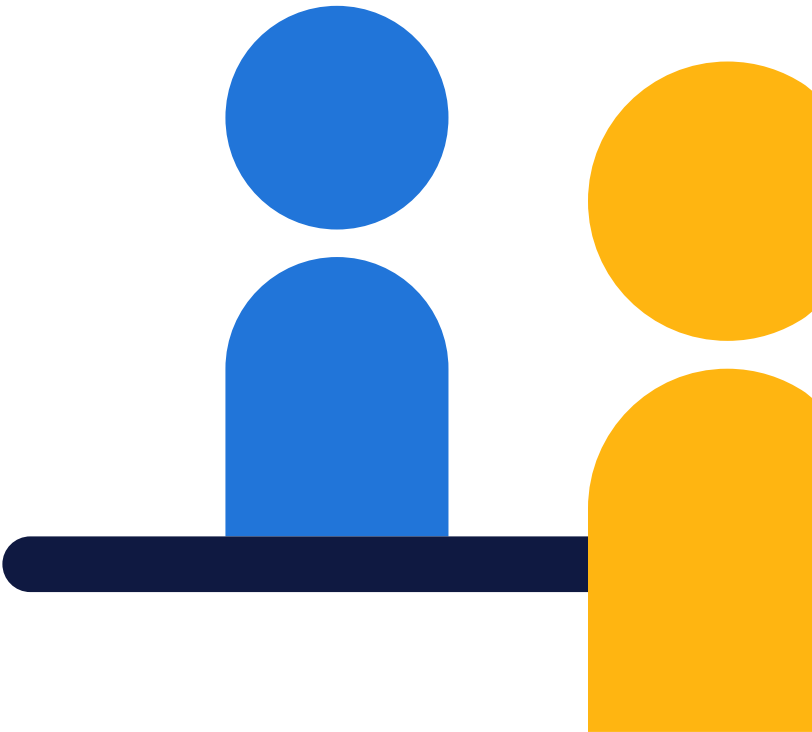
In order to make sure that the less well known brands are assessed by a sufficient number of respondents, we make use of a smart sampling method.

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.

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.



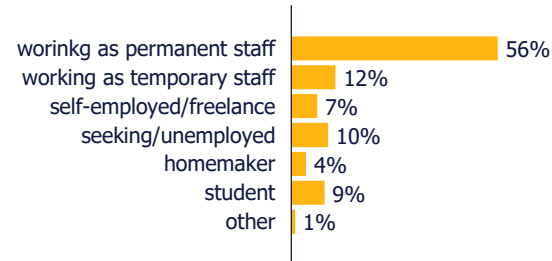
sample composition in spain

socio-demographics, employment situation, region.

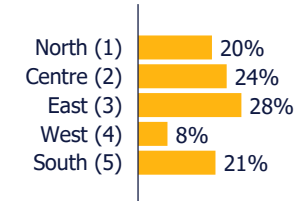
gender



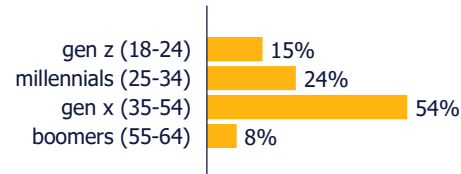
situation



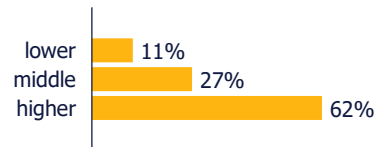
region



age



education

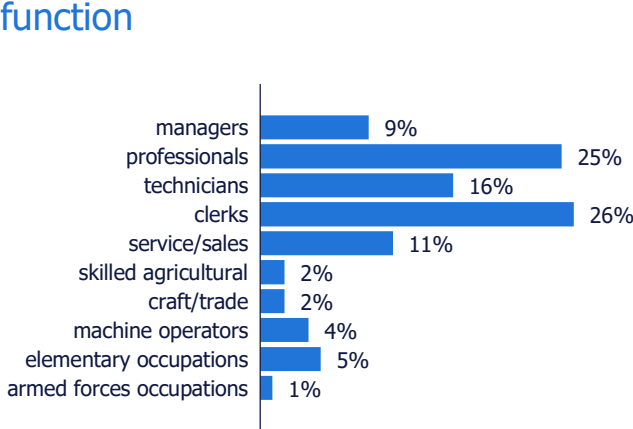
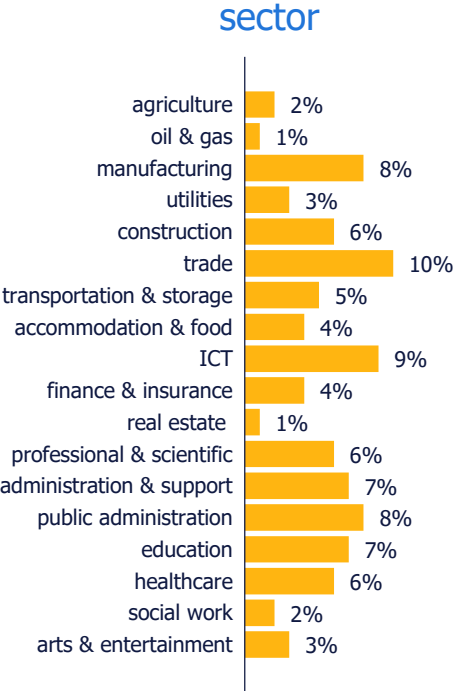


1. Álava, Asturias, Cantabria, La Coruña, Guipúzcoa, Huesca, Lugo, Navarra, Ourense, Pontevedra, Rioja (La), Teruel, Vizcaya, Zaragoza
2. Albacete, Ciudad Real, Cuenca, Guadalajara, Madrid, Toledo
3. Alicante, Islas Baleares, Barcelona, Castellón, Girona, Lleida, Murcia, Tarragona, València
4. Ávila, Badajoz, Burgos, Cáceres, León, Palencia, Salamanca, Segovia, Soria, Valladolid, Zamora
5. Almería, Cádiz, Córdoba, Granada, Huelva, Jaén, Málaga, Palmas (Las), Santa Cruz de Tenerife, Sevilla

total sample: 10,939
fieldwork: between 15 and 23 january 2019



sample composition in spain

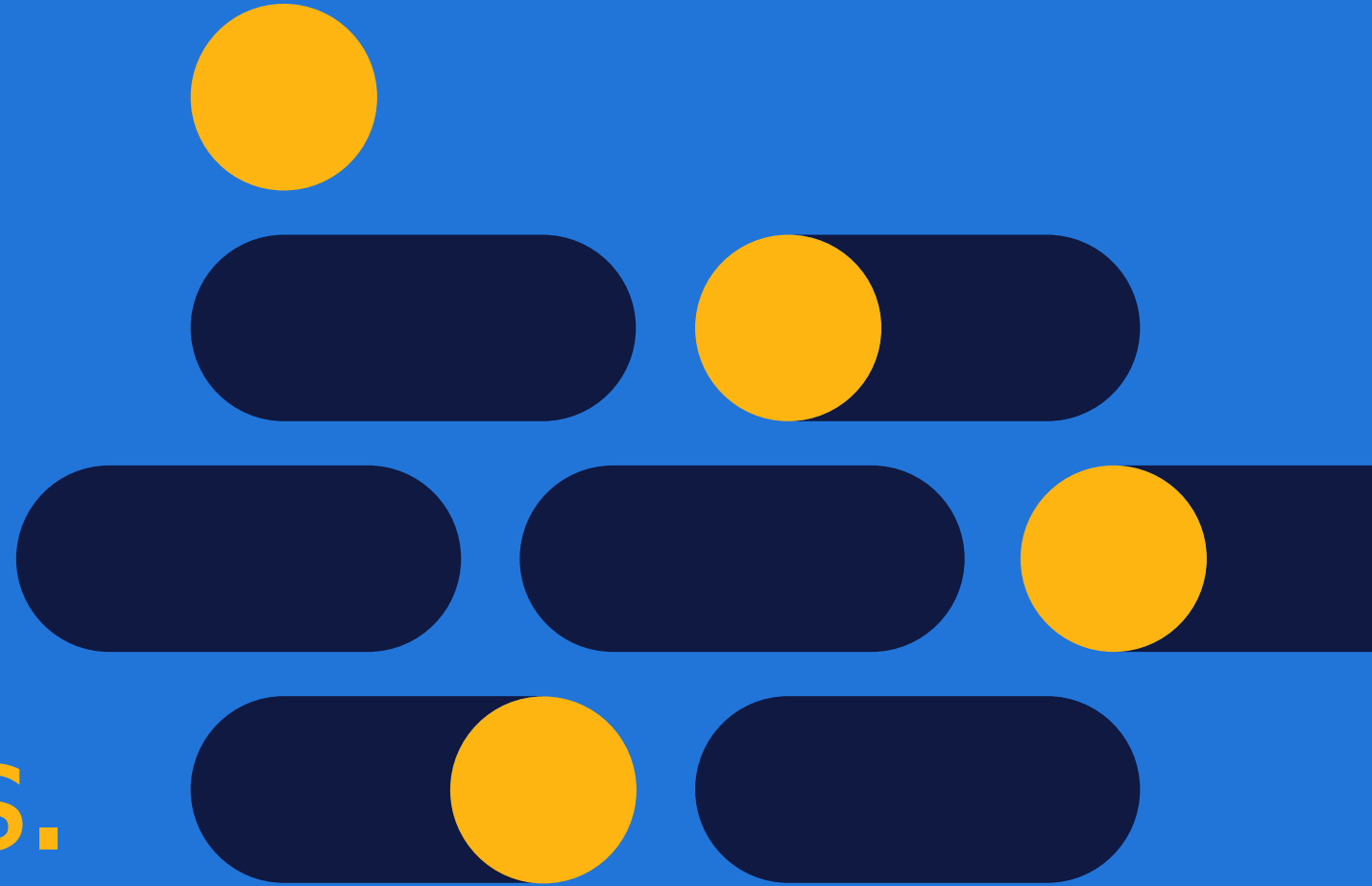


base: currently employed (n=8,273)



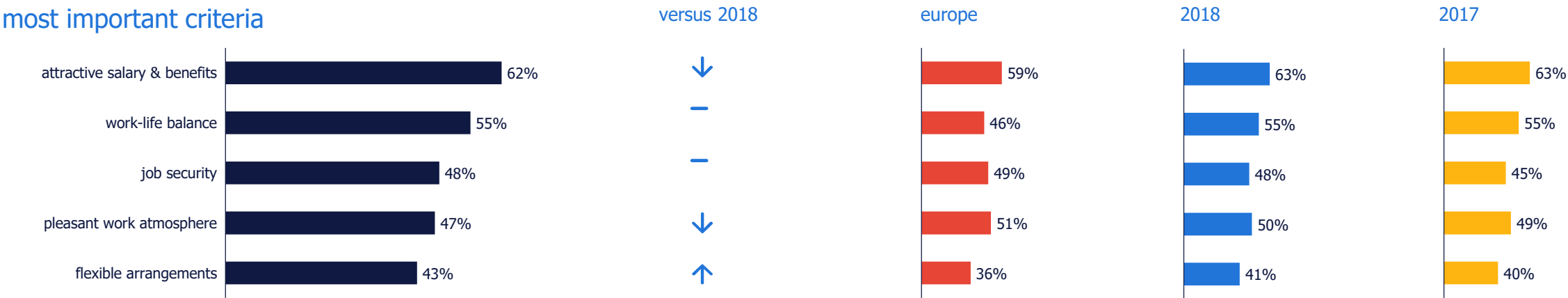
country

EVP drivers.

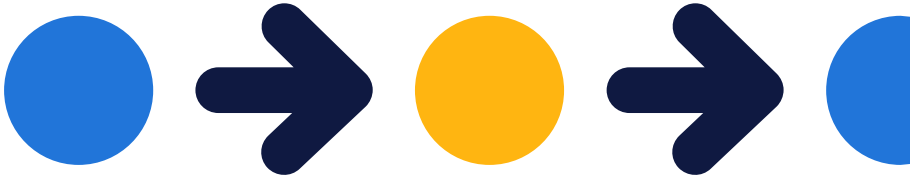


what potential employees want when choosing an employer.

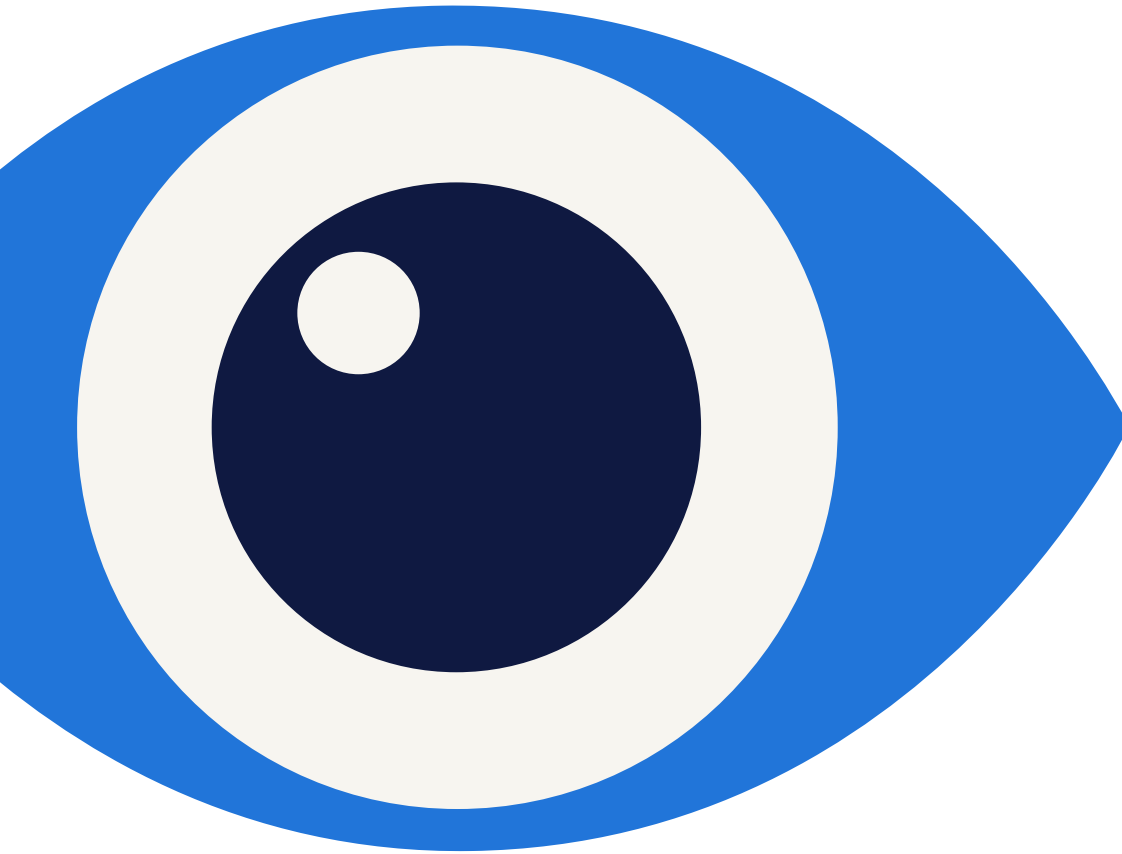
most important criteria



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



perception of employer offer in spain and the region.



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

employers in spain are perceived to offer.

- 1 financially healthy
- 2 uses latest technologies
- 3 very good reputation
- 4 long-term job security
- 5 career progression
- 6 interesting job content
- 7 pleasant work atmosphere
- 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 spain.

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)

27%

of the gen z's are looking for an employer that gives back to society. This is higher when compared to older workforce.

gen x (35-54)

60%

of the gen x's find good work-life balance a very important pull factor towards an employer. Among other generations, this factor is deemed less important.

millennials (25-34)

48%

of the millennials find pleasant work atmosphere an important factor towards an employer. Gen z is less interested in this offering from their employer.

boomers (55-64)

53%

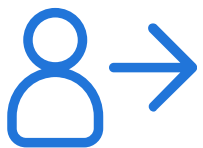
of the millennials find the provision of job security an important factor in their ideal employer. This is less so among gen z's and millennials.



[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.

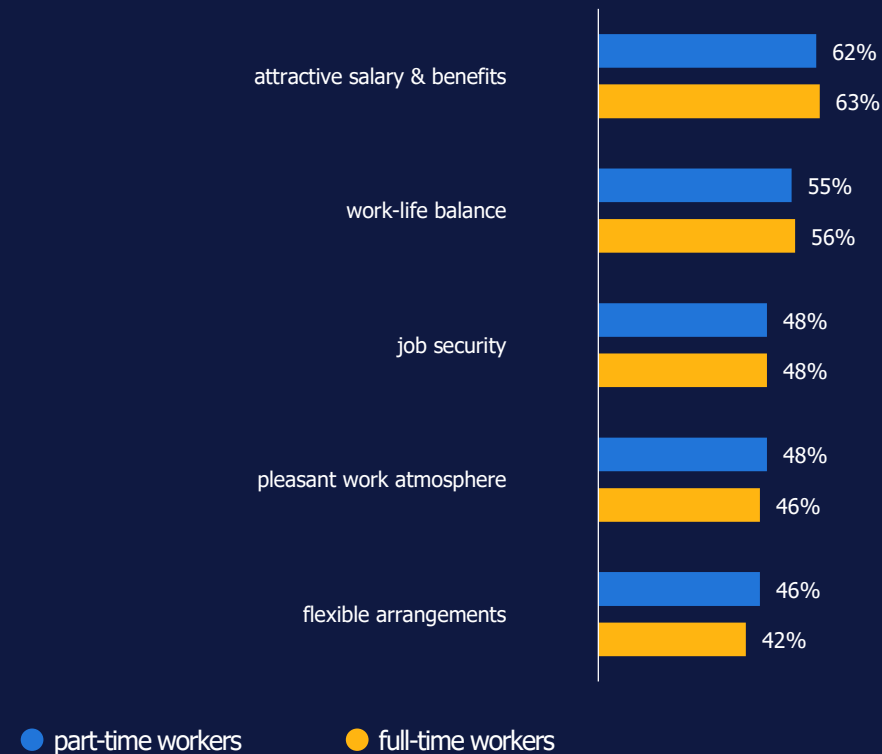


15%

of today's workforce
works part-time.

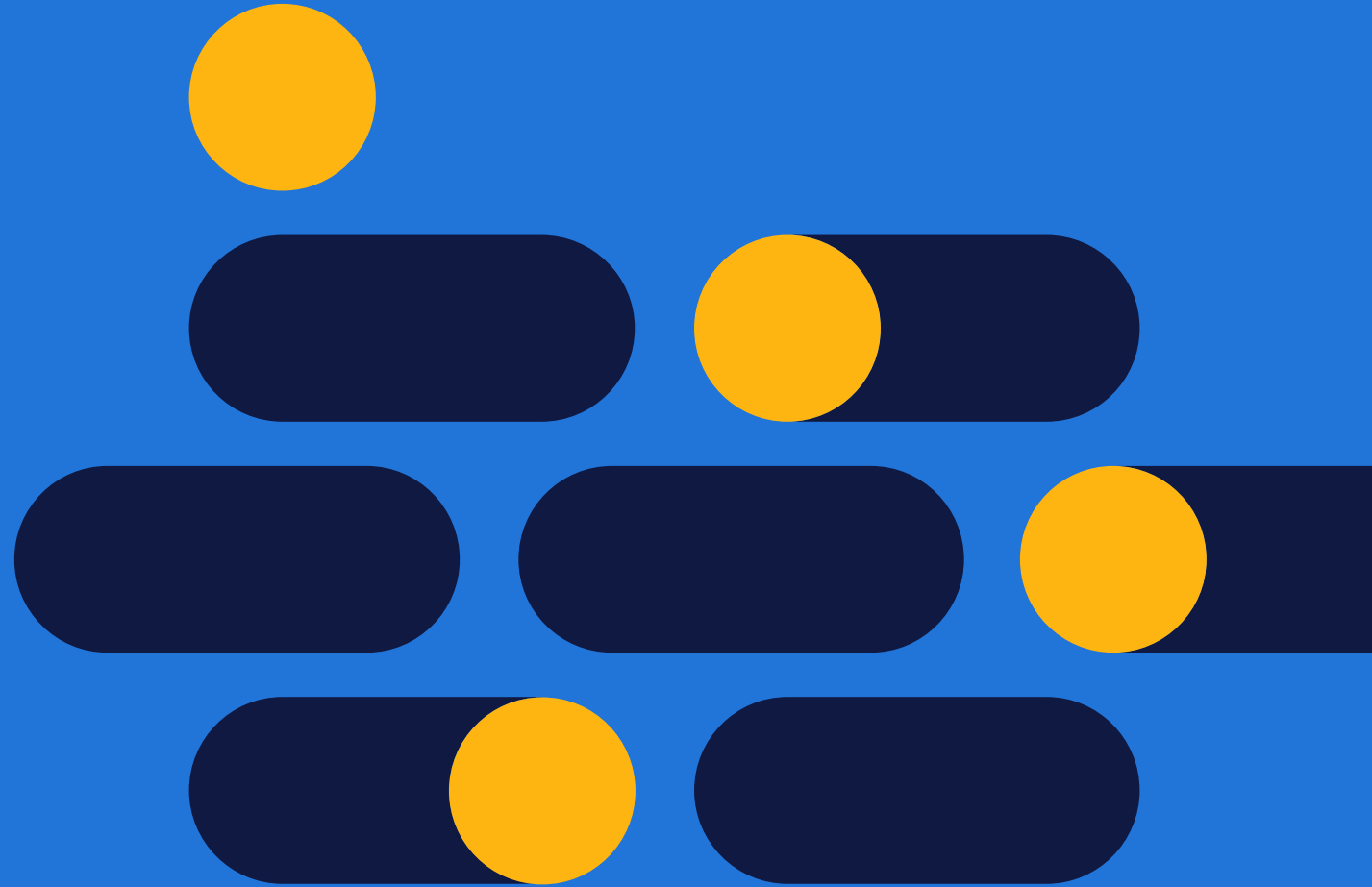


most important attributes



switchers and stayers

in focus.



changing employer spain vs europe.

switchers: changed employer in the past year.



stayers: stayed with their employer in the past year.

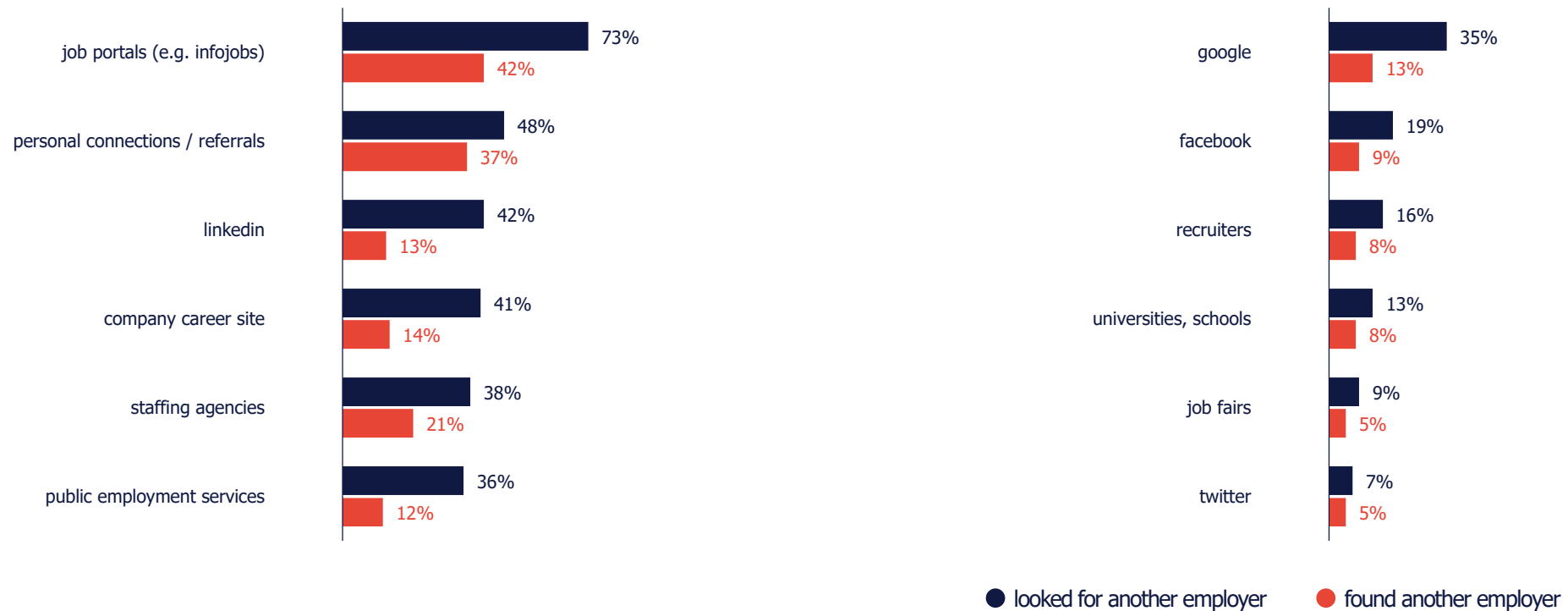


intenders: plan to change employer within the next year.

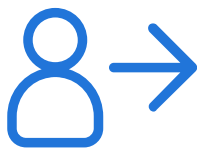


how do spanish workers look for and find employers.

channels used to look for and find employers



most important attributes switchers vs stayers.



17% (18%)*

switchers: changed
employer in
the past year.



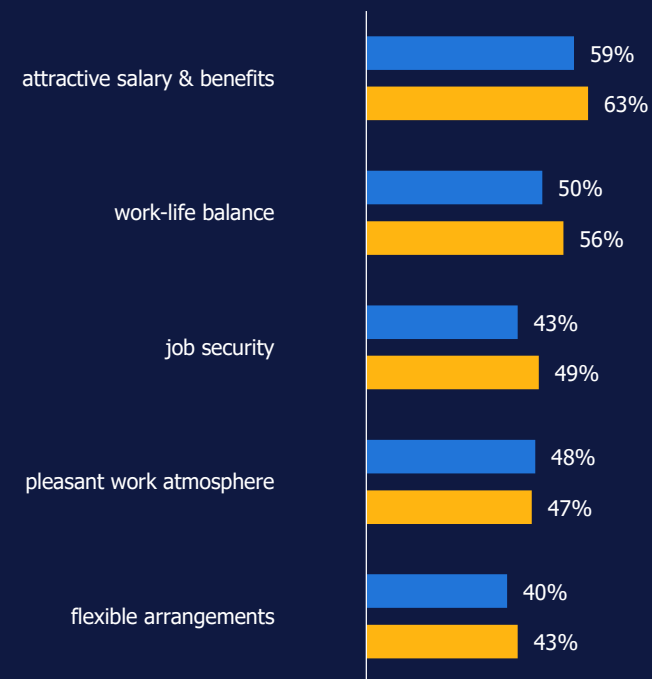
83% (82%)*

stayers: stayed with their
employer
in the past year.

*in 2018



most important attributes



● switchers

● stayers

most important attributes intenders.



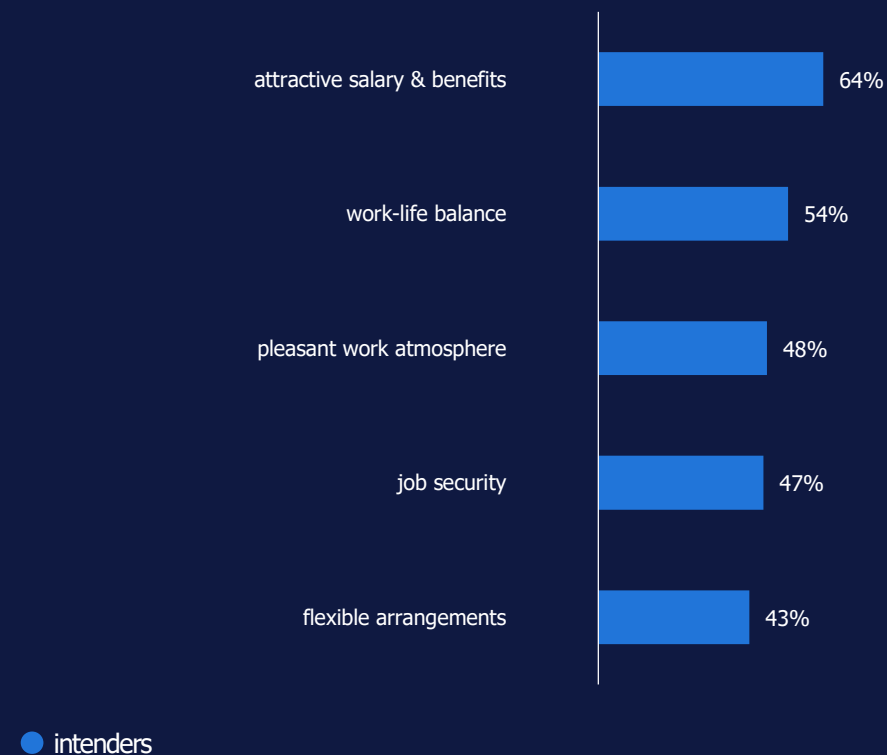
30% (32)*

intenders: plan to
change employer
within the next year.

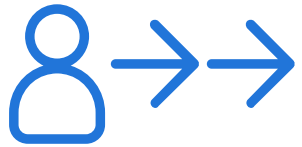
*in 2018



most important attributes



channels to look for employers intenders.



53% (56%)*

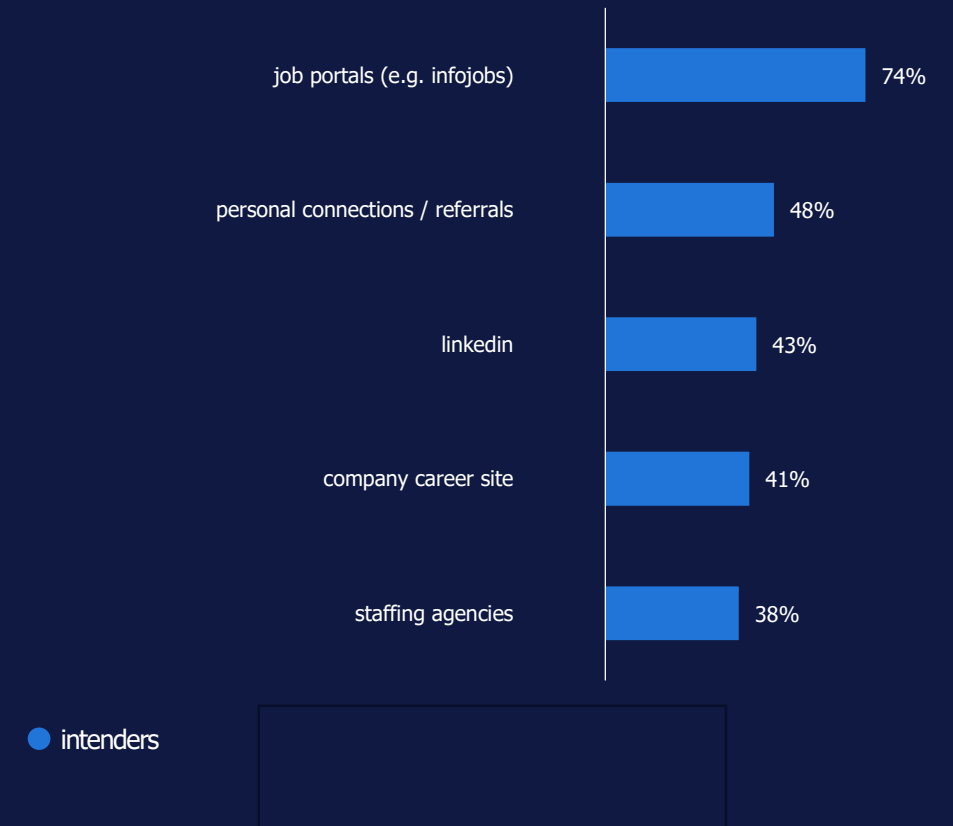
of last year's switchers**
intend to switch again
next year.

** n= 1,890 switched last year

*in 2018



channels to look for employers

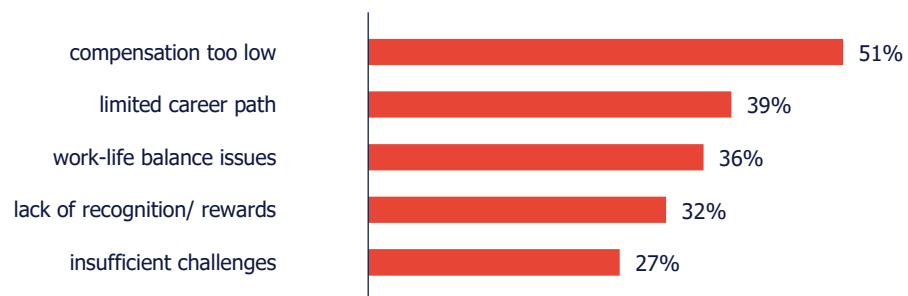


why do the spanish stay or leave.

main reasons to stay

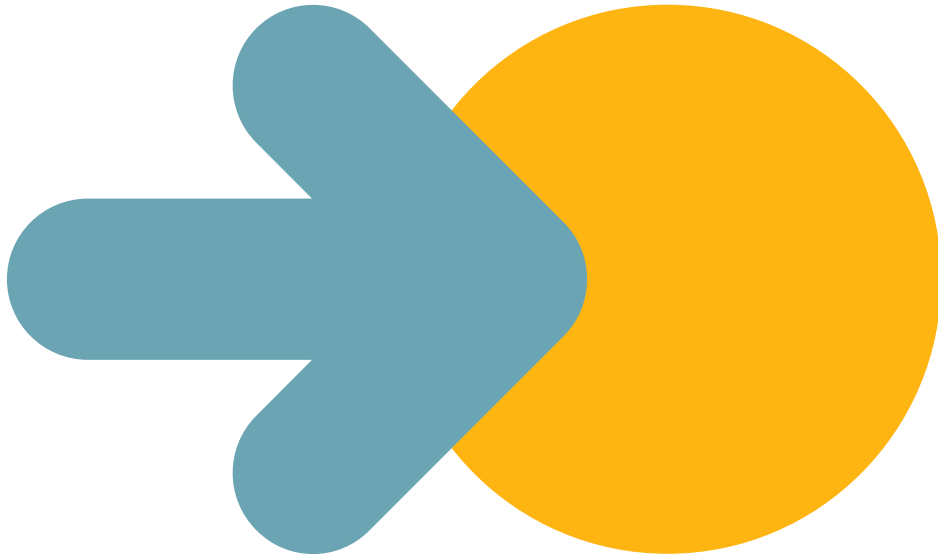


main reasons to leave



what factors do the spanish stay for

reasons to stay, by profile.



gen z (18-24)

31%

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

gen x (35-54)

39%

of the gen x's stay with their employer for flexible arrangements. Among other generations, this factor is deemed less important.

millennials (25-34)

25%

of the millennials stay with an employer if they have a very good reputation. Older generations are less interested in this offering from their employer.

boomers (55-64)

52%

of the boomers are more likely to stay with their current employer if they have job security. This is less so among gen z and millennials.

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

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

gen z (18-24)

32%

of the gen z's are leaving their employer if they have insufficient challenges in their job. This is higher when compared to older workforce.

gen x (35-54)

39%

of the gen x's leave their employer if they have work-life balance issues. Among other generations, this factor is deemed less important as a reason to leave.

millennials (25-34)

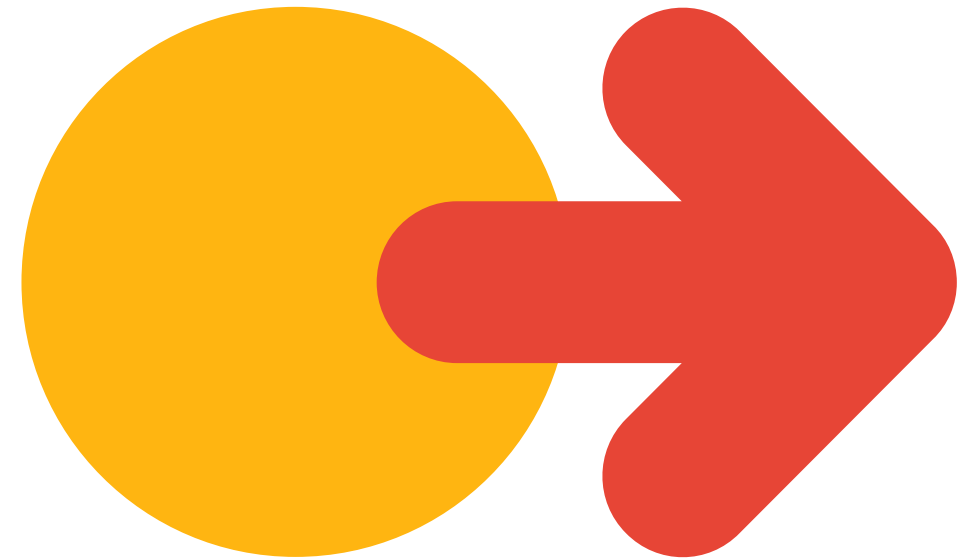
41%

of the millennials leave if they have a limited career path. Boomers are less interested in this offering from their employer.

boomers (55-64)

30%

of the boomers are more likely to leave their employer if the organization is not financially stable. This is less so among gens z and x.

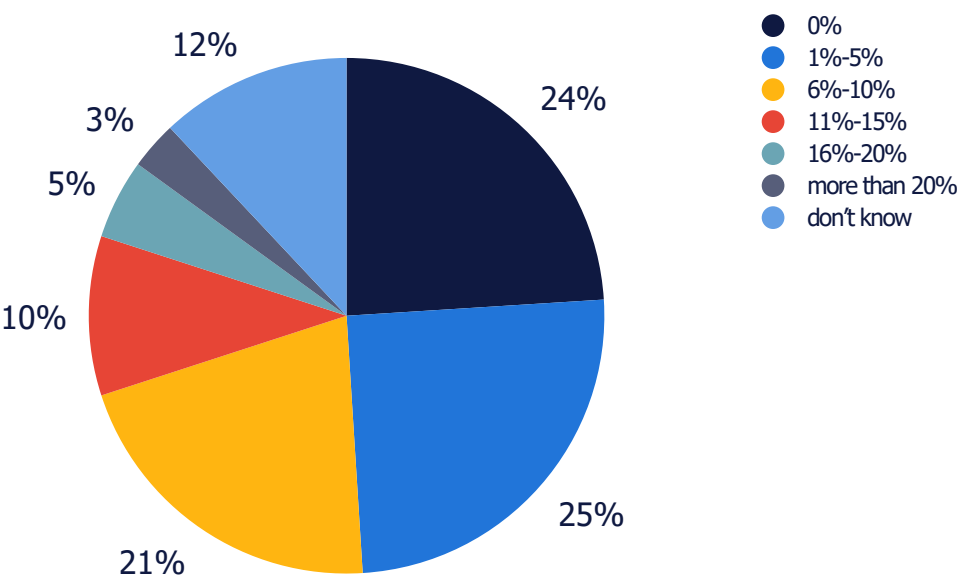


[click here](#) for a breakdown of all results.



willingness to forfeit salary for more work security.

amount of salary employees are willing to forfeit



spain

18%

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

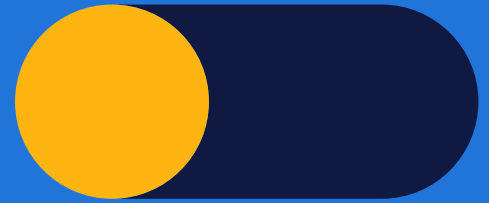
europa

16%

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



ideal employer

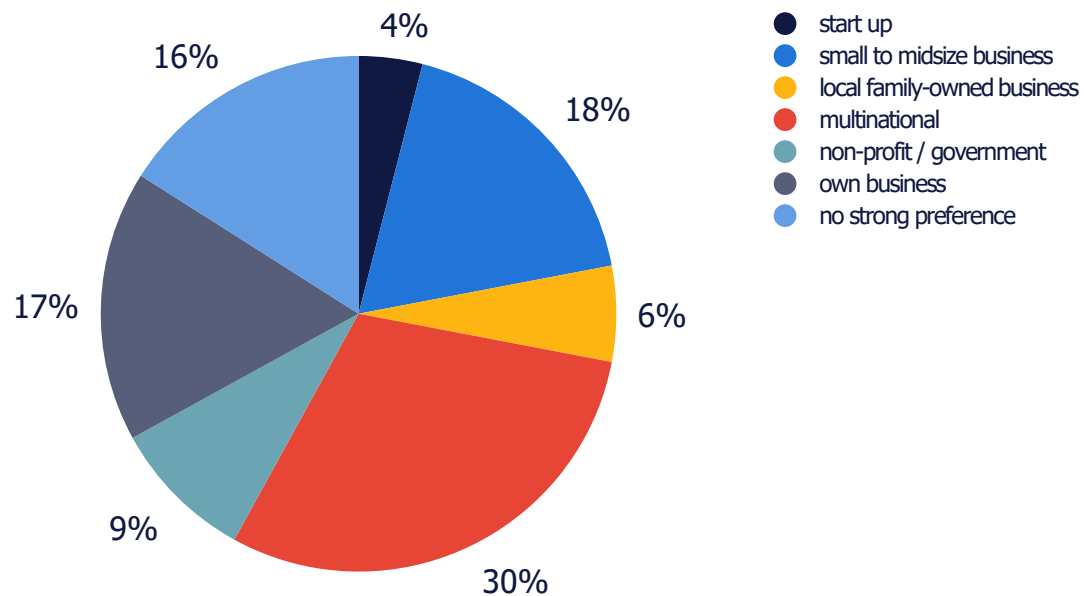


in focus.



30% of the spanish prefer to work for large (multinational) corporation.

preferred company type



gen z (18-24)

21%

would prefer to work for a small to midsize business

gen x (35-54)

10%

would rather work for non-profit/ government

millennials (25-34)

16%

would rather have own business

boomers (55-64)

22%

have no strong preference

company type preference

reasons why.

multinational (30%)

job security

career progression

financial health

non-profit / government (9%)

job security

work-life balance

interesting job content

small to midsize (18%)

pleasant work atmosphere

job security

work-life balance

local family-owned (6%)

pleasant work atmosphere

work-life balance

job security

own business (17%)

work-life balance

pleasant work atmosphere

flexible arrangements

start-up (4%)

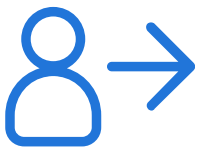
interesting job content

career progression

pleasant work atmosphere



company type preference switchers vs stayers.



31%

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

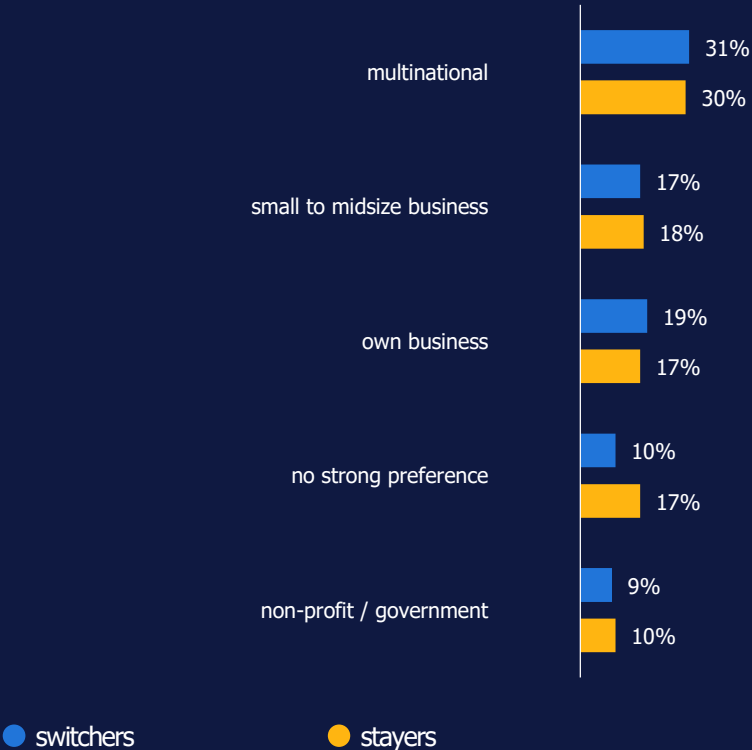


17%

of the stayers have no strong preference.

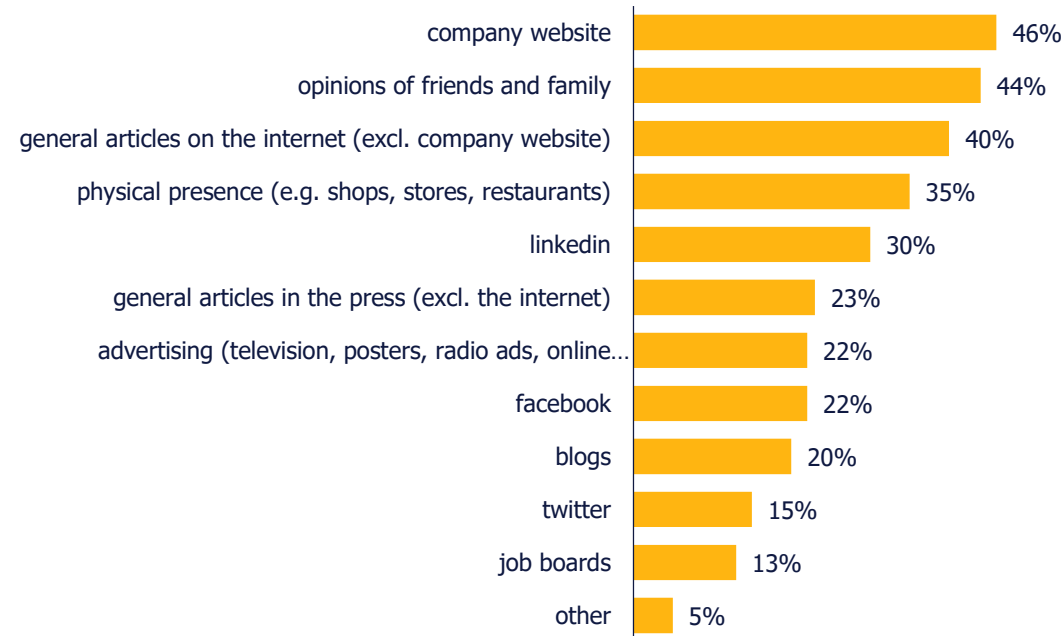


company type preference



89% of the spanish check potential employer's reputation.

channels for reputation check



most often used

gen z (18-24)

51%

opinions of friends and family

gen x (35-54)

24%

general articles in the press
(excl. internet)

millennials (25-34)

34%

linkedin

boomers (55-64)

19%

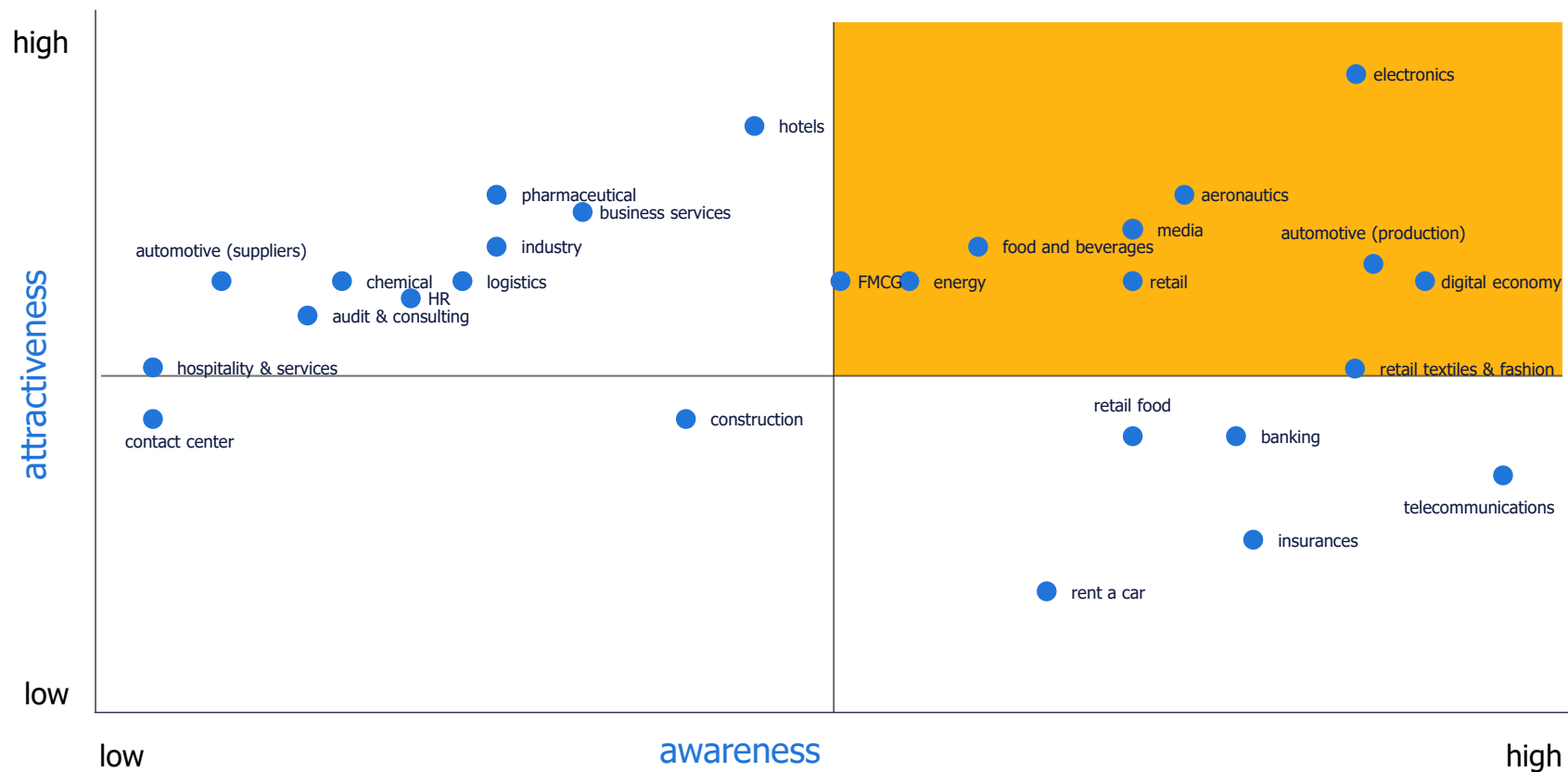
don't check employers'
reputation

sector



insights.

top performing sectors in spain 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.



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

1/3

		top 3 EVP drivers		
sector		1	2	3
01	electronics	uses latest technologies	financially healthy	very good reputation
02	hotels	financially healthy	very good reputation	interesting job content
03	pharmaceutical	financially healthy	uses latest technologies	very good reputation
04	aeronautics	financially healthy	uses latest technologies	interesting job content
05	business services	uses latest technologies	financially healthy	career progression
06	media	uses latest technologies	financially healthy	interesting job content
07	food and beverages	financially healthy	very good reputation	uses latest technologies
08	industry	uses latest technologies	financially healthy	very good reputation
09	automotive (production)	financially healthy	uses latest technologies	very good reputation
10	energy	financially healthy	uses latest technologies	job security



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

2/3

		top 3 EVP drivers		
sector		1	2	3
11	logistics	financially healthy	uses latest technologies	very good reputation
12	digital economy	financially healthy	uses latest technologies	very good reputation
13	retail	financially healthy	very good reputation	uses latest technologies
14	FMCG	financially healthy	very good reputation	uses latest technologies
15	chemical	uses latest technologies	financially healthy	very good reputation
16	automotive (suppliers)	uses latest technologies	financially healthy	very good reputation
17	HR	financially healthy	uses latest technologies	career progression
18	audit & consulting	financially healthy	uses latest technologies	career progression
19	hospitality & services	financially healthy	uses latest technologies	career progression
20	retail textiles & fashion	financially healthy	very good reputation	pleasant work atmosphere

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

3/3

		top 3 EVP drivers		
sector		1	2	3
21	construction	financially healthy	uses latest technologies	career progression
22	contact center	uses latest technologies	financially healthy	career progression
23	retail food	financially healthy	very good reputation	job security
24	banking	financially healthy	uses latest technologies	career progression
25	telecommunications	uses latest technologies	financially healthy	very good reputation
26	insurances	financially healthy	uses latest technologies	very good reputation
27	rent a car	financially healthy	uses latest technologies	very good reputation

top



employers.

top employers in spain.

top 10 employers 2019

- 01 Nestlé
 - 02 Sony
 - 03 Starwood Hoteles
 - 04 BSH Bosch + Siemens Electrodomésticos
 - 05 Mercedes Benz
 - 06 Amazon
 - 07 Meliá Hotels International
 - 08 IBM
 - 09 Correos
 - 10 HP Inc
-

top 10 employers 2018

- 01 Amazon
 - 02 Sony
 - 03 Nestlé
 - 04 HP Inc
 - 05 Hewlett Packard Enterprise
 - 06 BSH Bosch + Siemens Electrodomésticos
 - 07 Volkswagen Audi España
 - 08 Glaxosmithkline
 - 09 Mercedes Benz
 - 10 Starwood Hoteles
-

spain's top companies

top 3 EVP drivers of the top 5 companies.

	top 3 EVP drivers		
top 5 companies	1	2	3
1 Nestlé	financially healthy	very good reputation	uses latest technologies
2 Sony	uses latest technologies	financially healthy	very good reputation
3 Starwood Hoteles	financially healthy	very good reputation	interesting job content
4 BSH Bosch + Siemens Electrodomésticos	uses latest technologies	financially healthy	very good reputation
5 Mercedes Benz	financially healthy	uses latest technologies	very good reputation

top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	IBM	Pfizer	Mercedes Benz
career progression	IBM	Oracle	HP Inc
financially healthy	Amazon	Coca Cola	Mercadona
gives back to society	Calidad Pascual	Ebro Foods	Compass grupo
interesting job content	IBM	Aernnova	Sony
job security	Correos	Bayer	Nestlé
pleasant work atmosphere	Starwood Hoteles	Calidad Pascual	Nestlé
uses latest technologies	HP Inc	Huawei	Sony
very good reputation	Mercedes Benz	BSH Bosch + Siemens Electrodomésticos	Nestlé
work-life balance	Correos	Ibermática	Compass grupo

deep dive

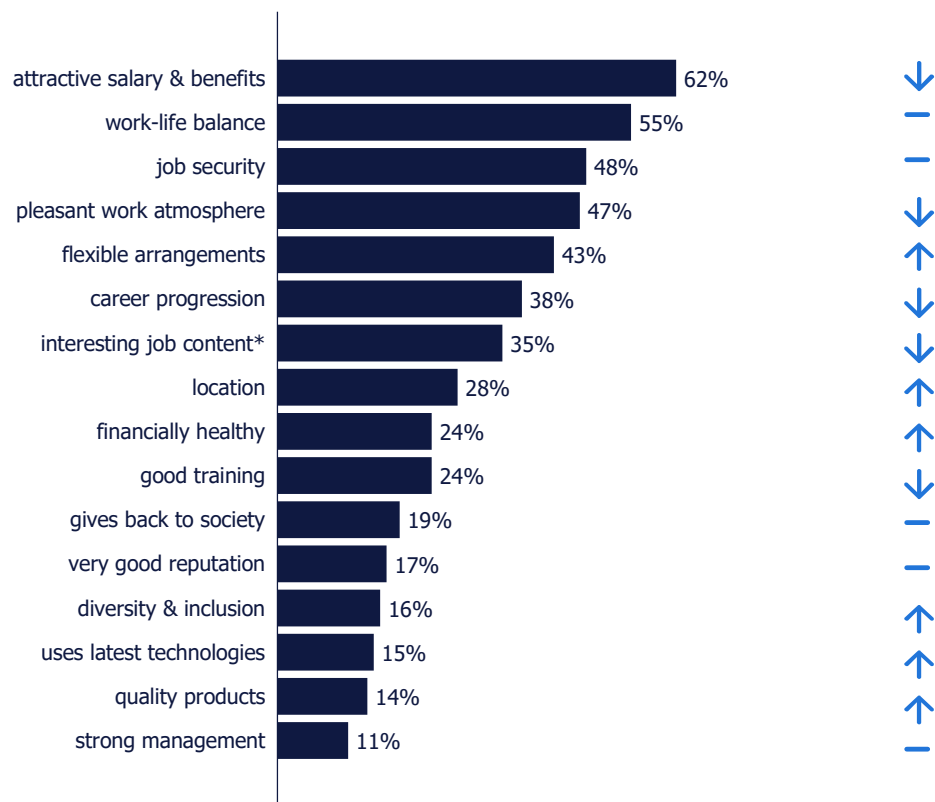
appendix 1.



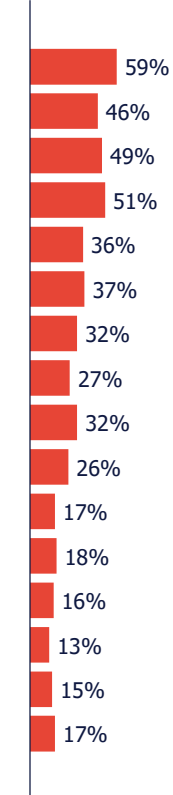
what potential employees want

the most important criteria when choosing an employer.

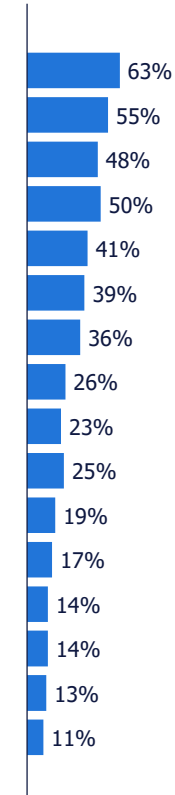
important criteria



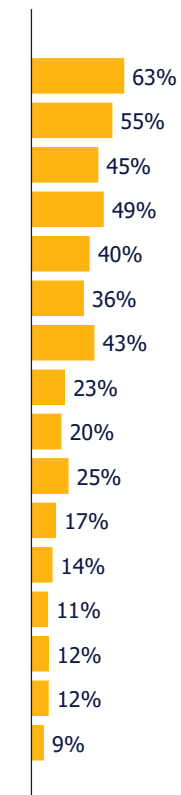
europe



2018



2017

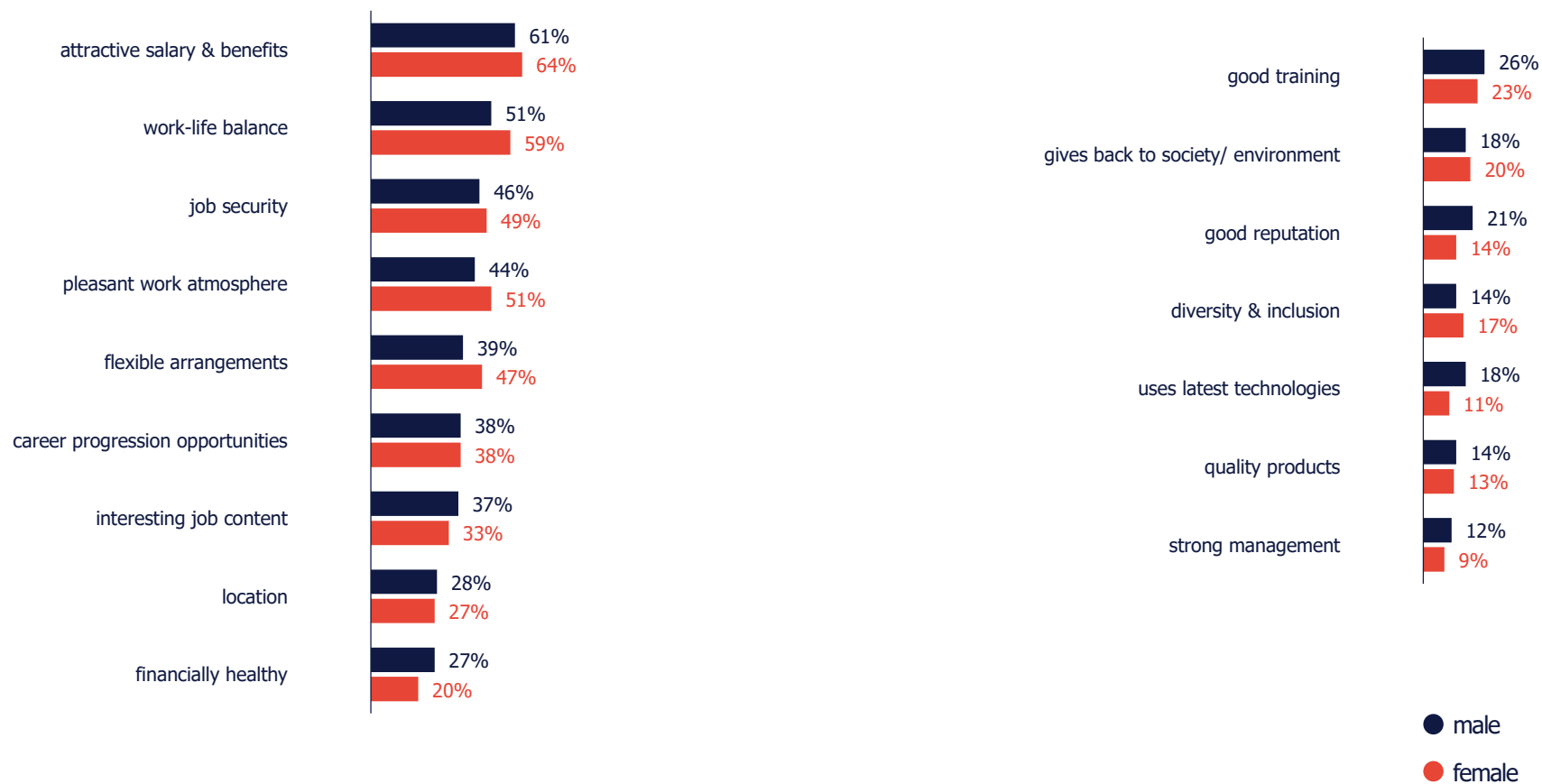


*2017: work that is stimulating and challenging

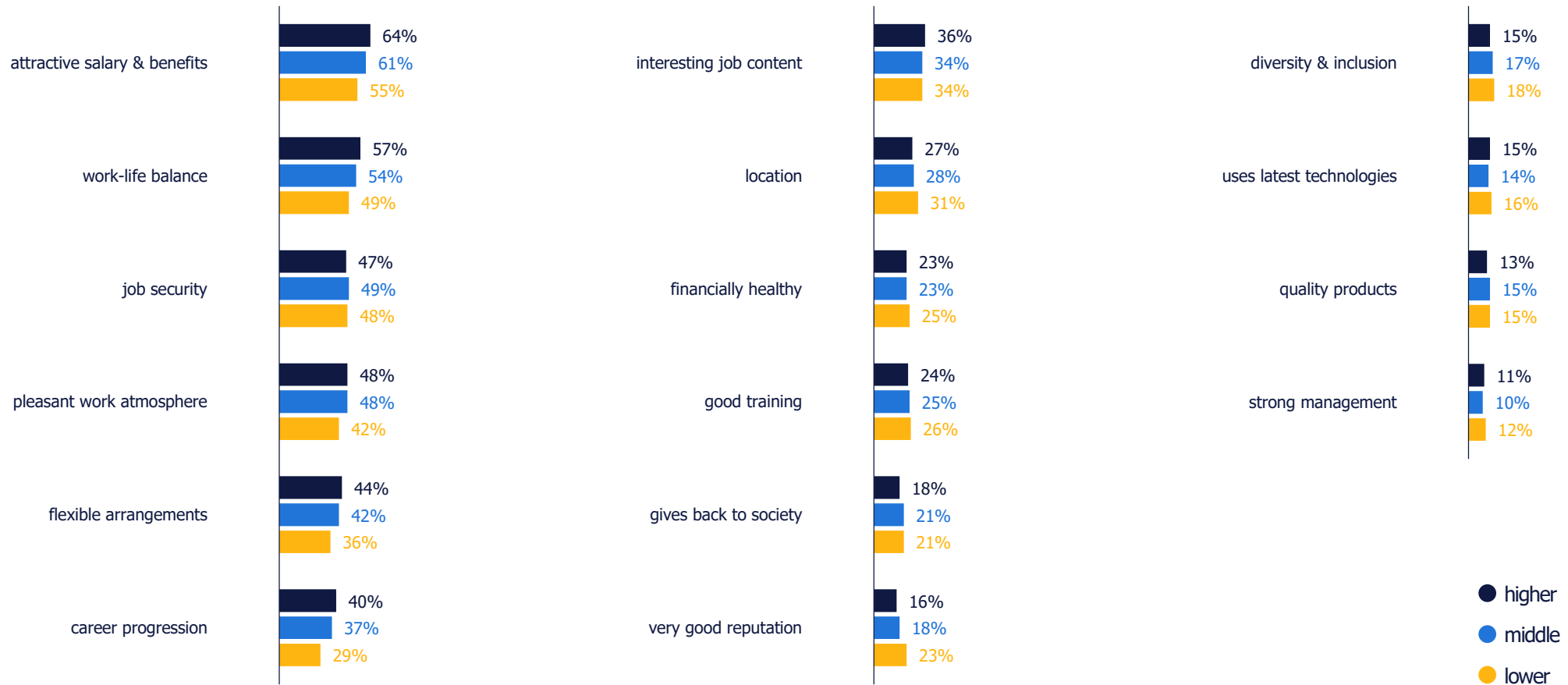
Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.



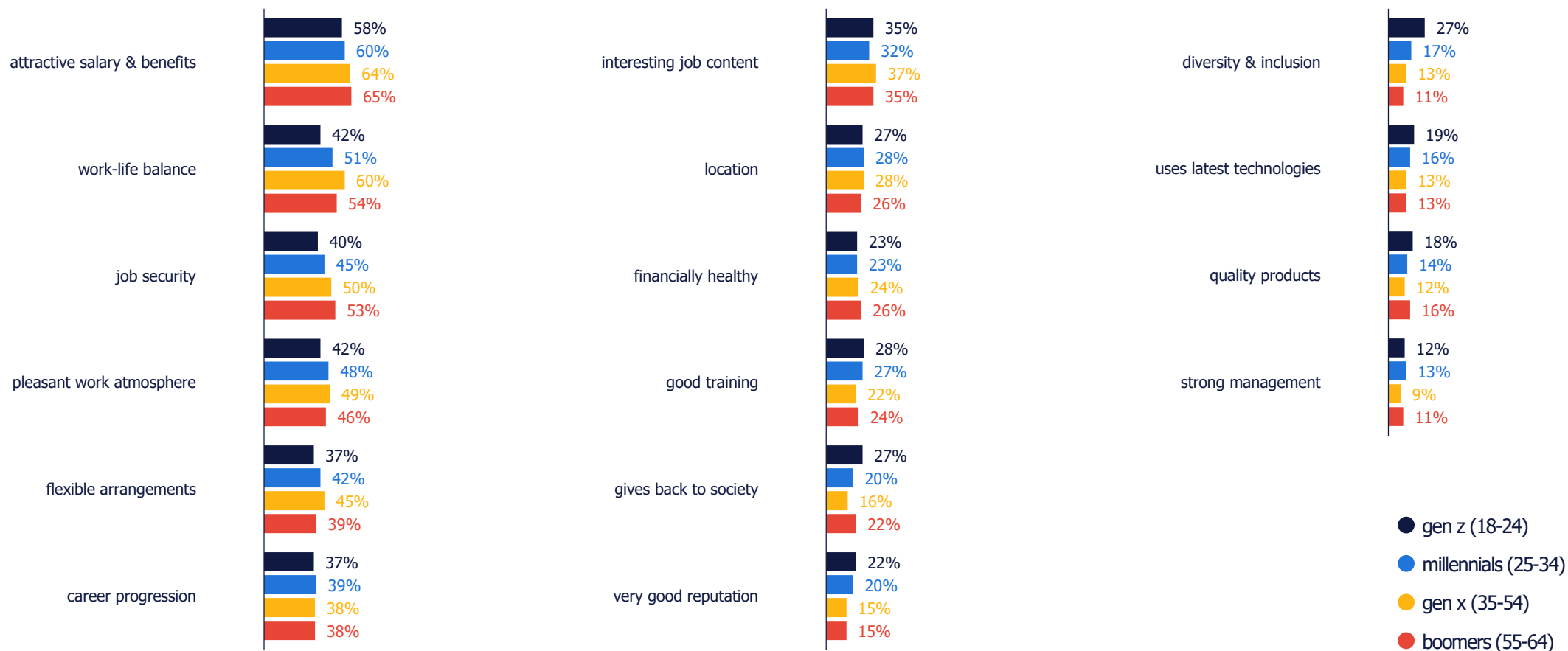
EVP driver importance by gender.



EVP driver importance by education.



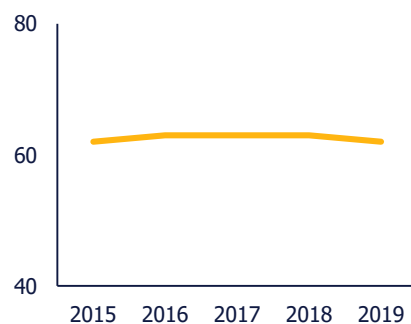
EVP driver importance by age.



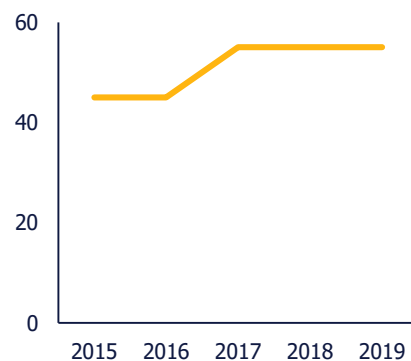
EVP driver importance trends, total.

1/2

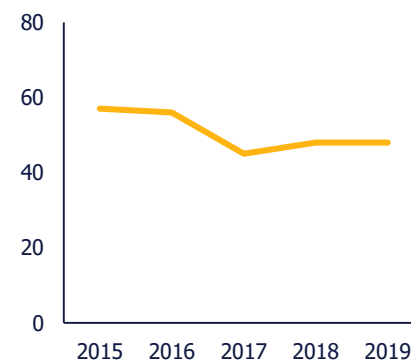
attractive salary & benefits



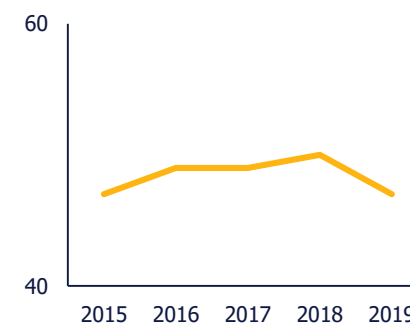
work-life balance



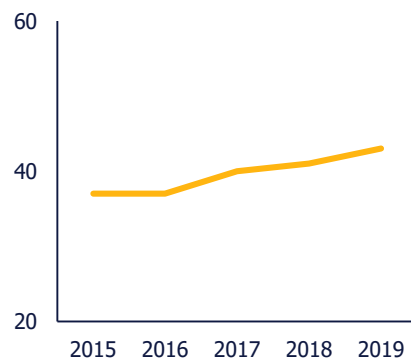
job security



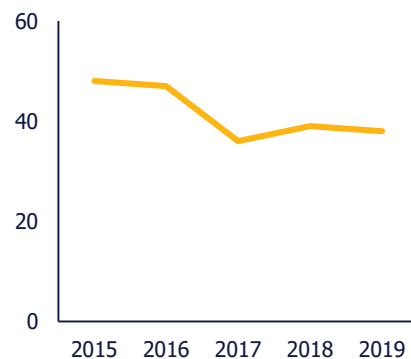
pleasant work atmosphere



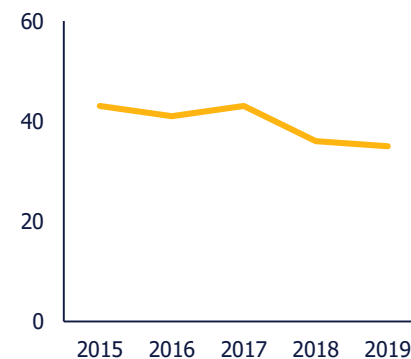
flexible arrangements



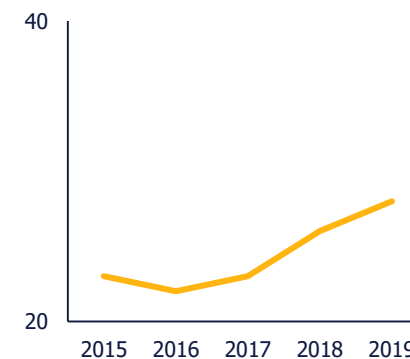
career progression



interesting job content*



location



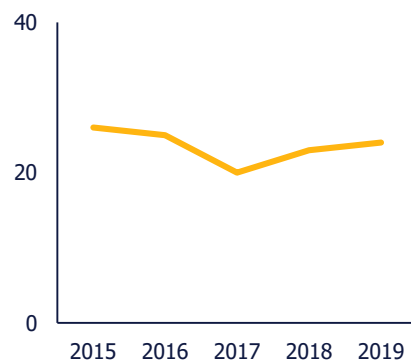
*2017: work that is stimulating and challenging



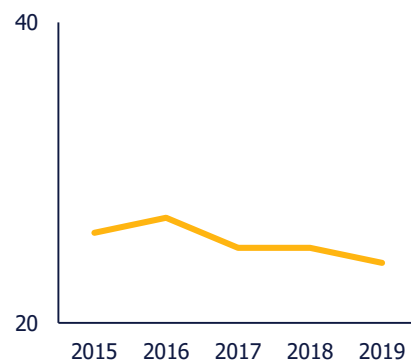
EVP driver importance trends, total.

2/2

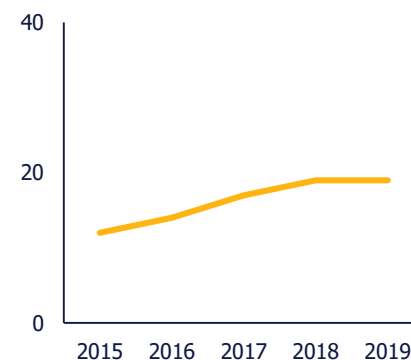
financially healthy



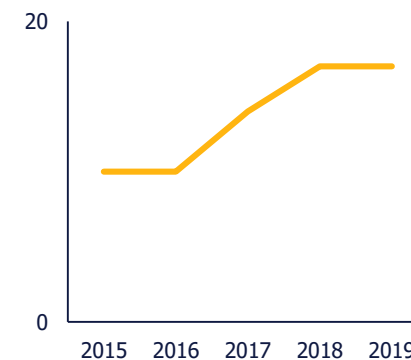
good training



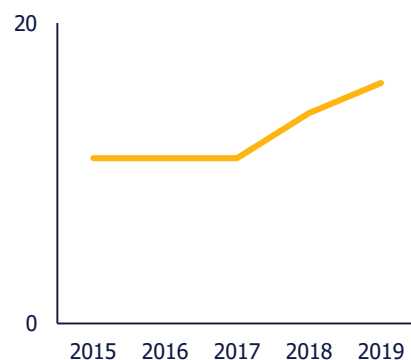
gives back to society



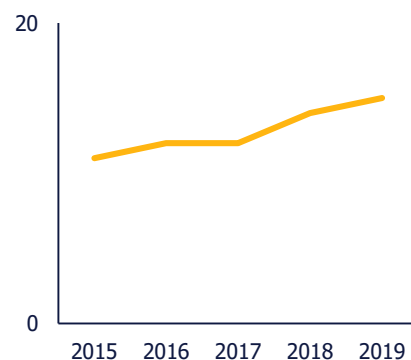
very good reputation*



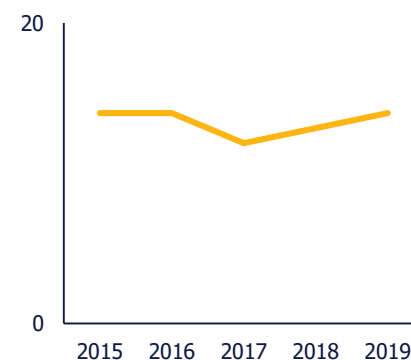
diversity & inclusion



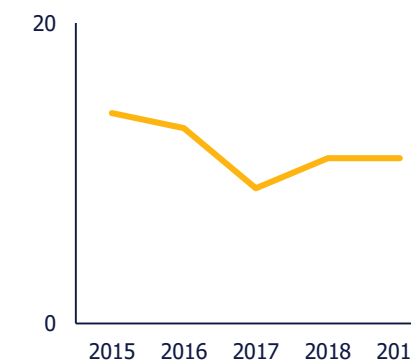
uses latest technologies



quality products



strong management

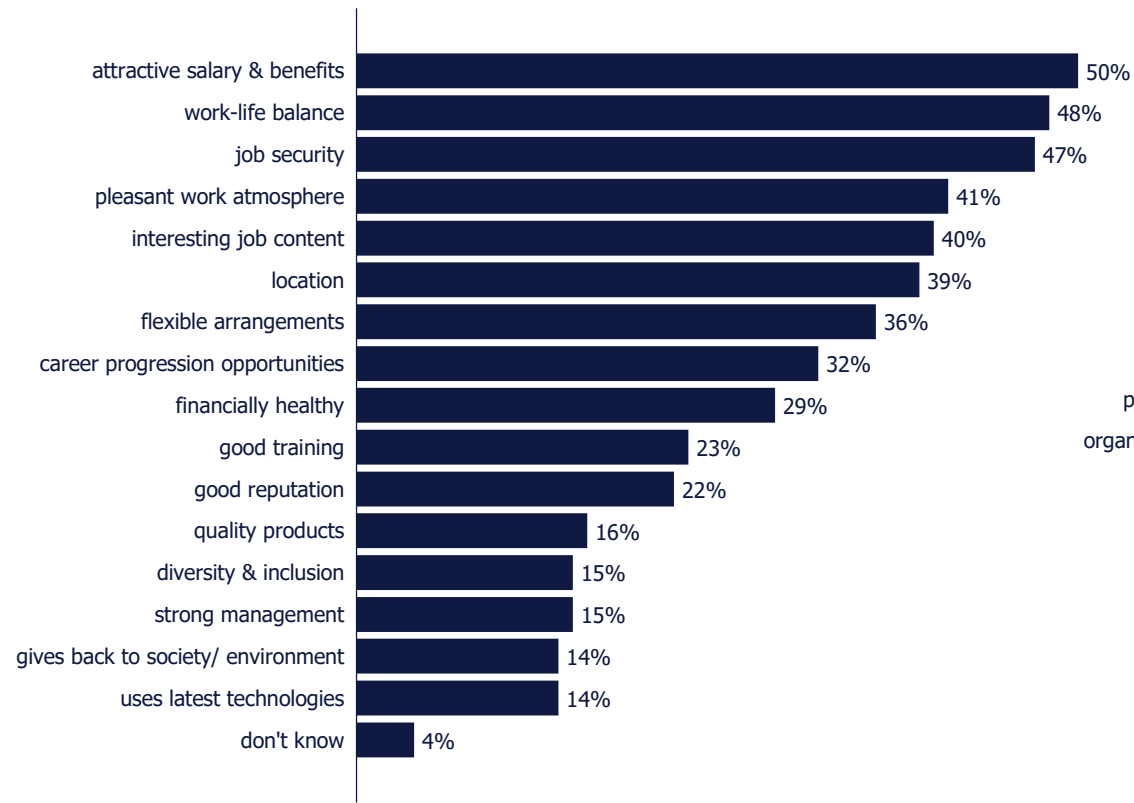


*previous to 2017: strong image/strong values

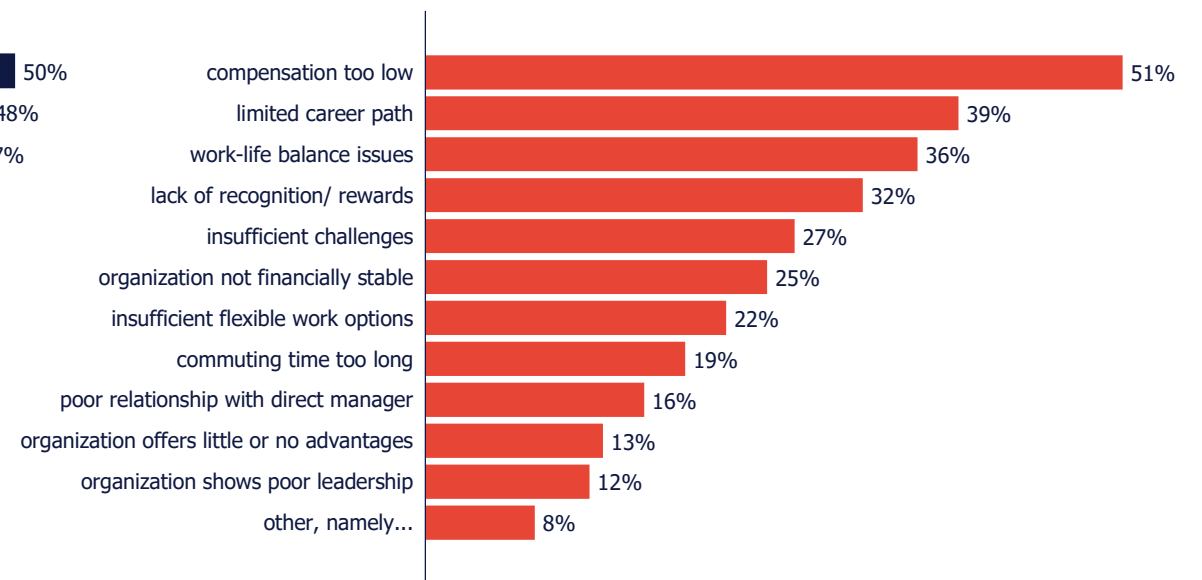


what factors do the spaniards stay or leave for.

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

- 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.

