

employer brand research 2019



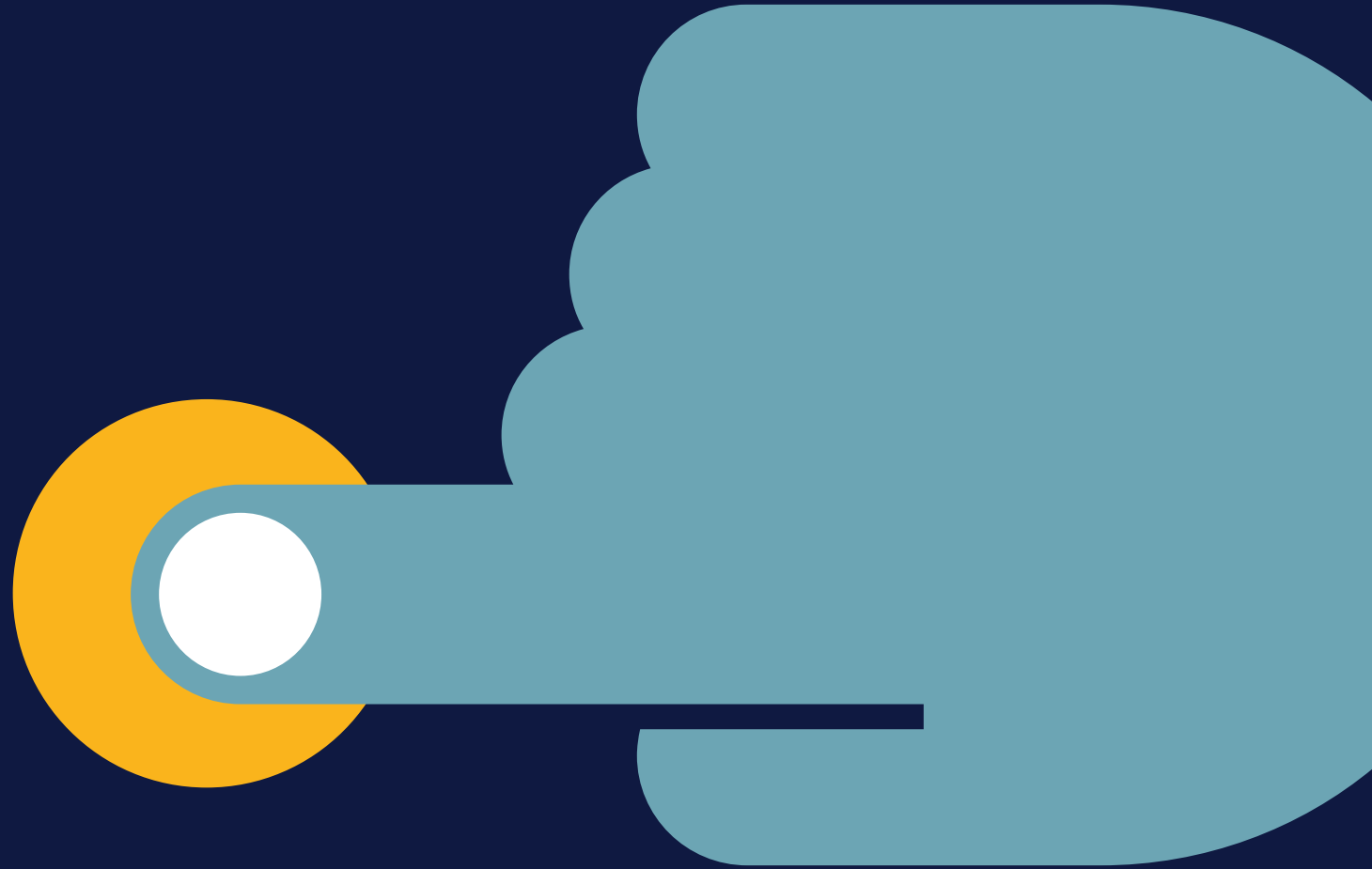
country report
italy.

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

- 7,709 respondents

fieldwork

- online interviews
- between 4 december 2018 and 2 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.

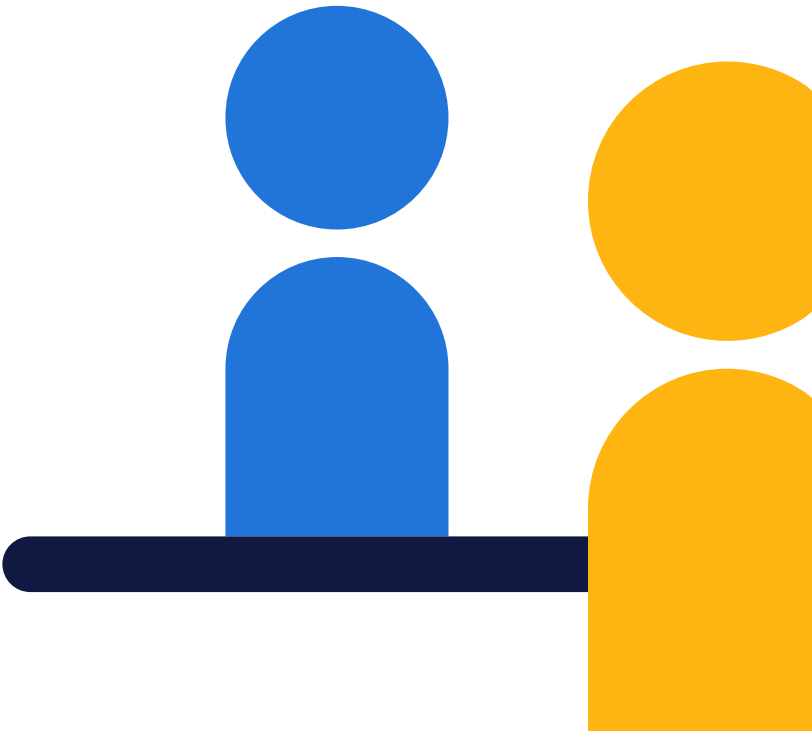
In order to make sure that the less well known brands are assessed by a sufficient number of respondents, we make use of a smart sampling method.

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.



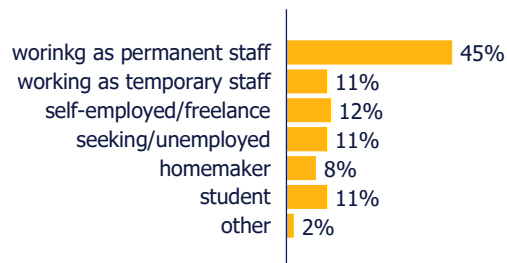
sample composition in italy

socio-demographics, employment situation, region.

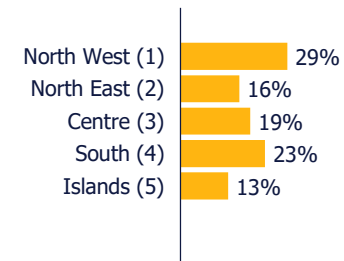
gender



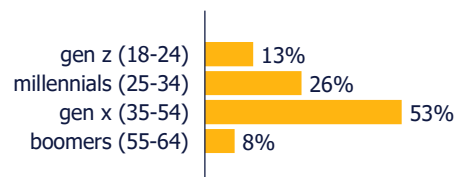
situation



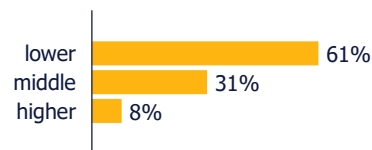
region



age



education



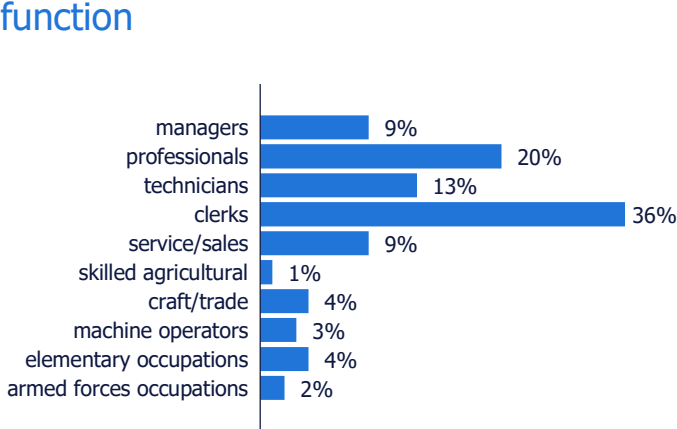
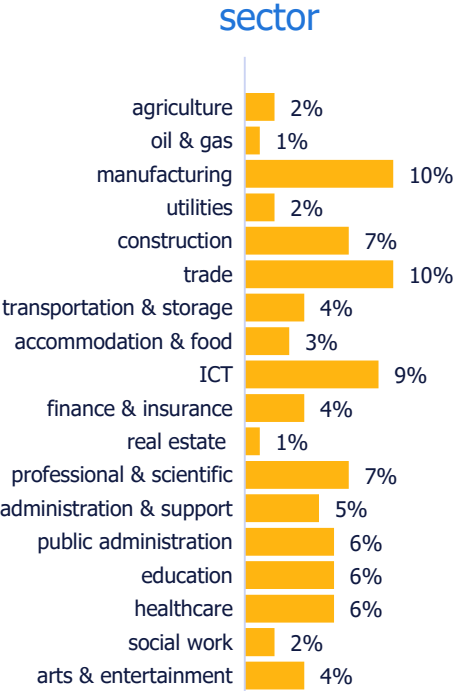
1. Piemonte, Valle D'Aosta, Lombardia, Liguria
2. Trentino Alto Adige, Veneto, Friuli Venezia Giulia, Emilia Romagna
3. Toscana, Umbria, Marche, Lazio
4. Abruzzo, Molise, Campania, Puglia, Basilicata, Calabria
5. Sicilia, Sardegna

total sample: 7,709

fieldwork: between 4 december 2018 and 2 january 2019



sample composition in italy

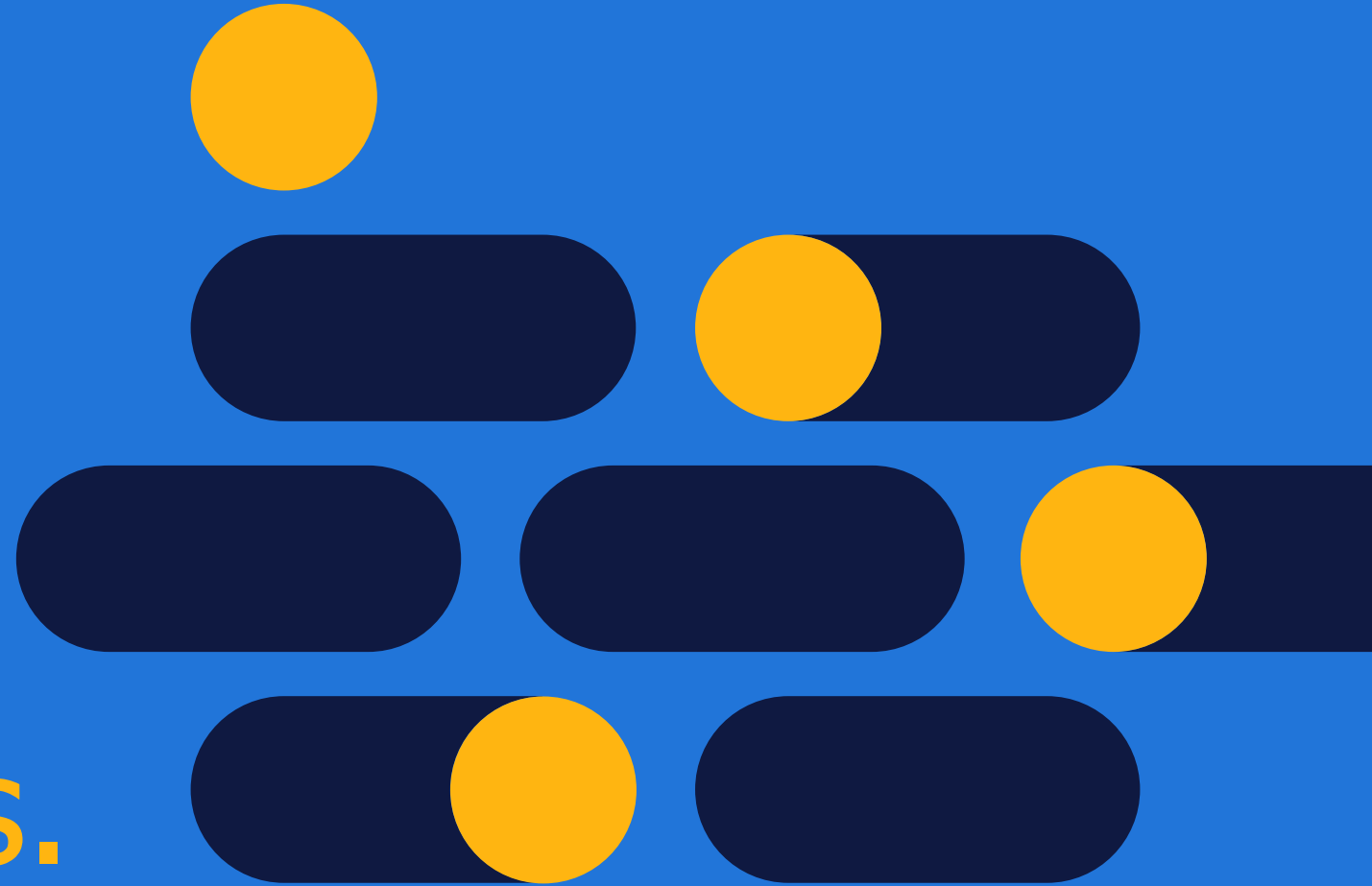


base: currently employed (n=5,277)



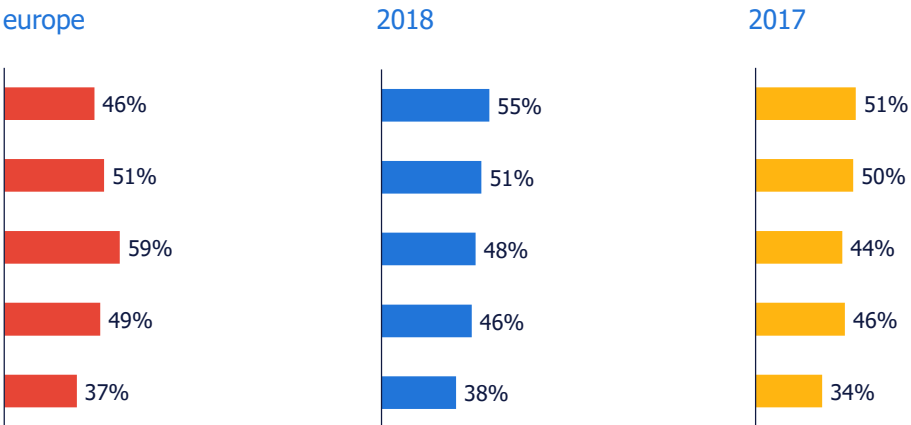
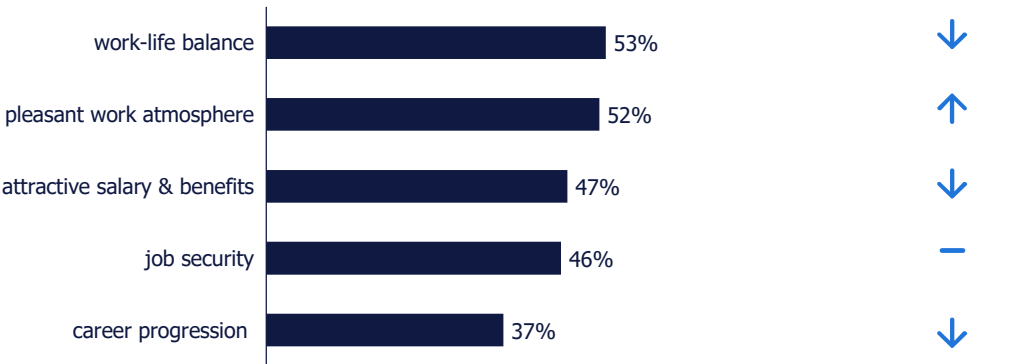
country

EVP drivers.

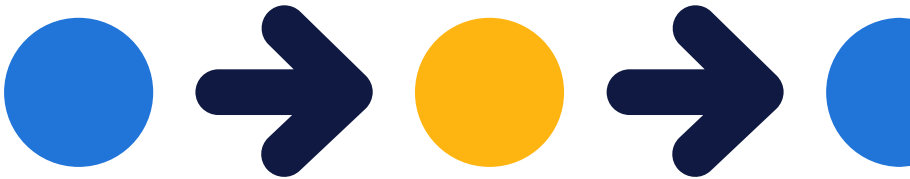


what potential employees want when choosing an employer.

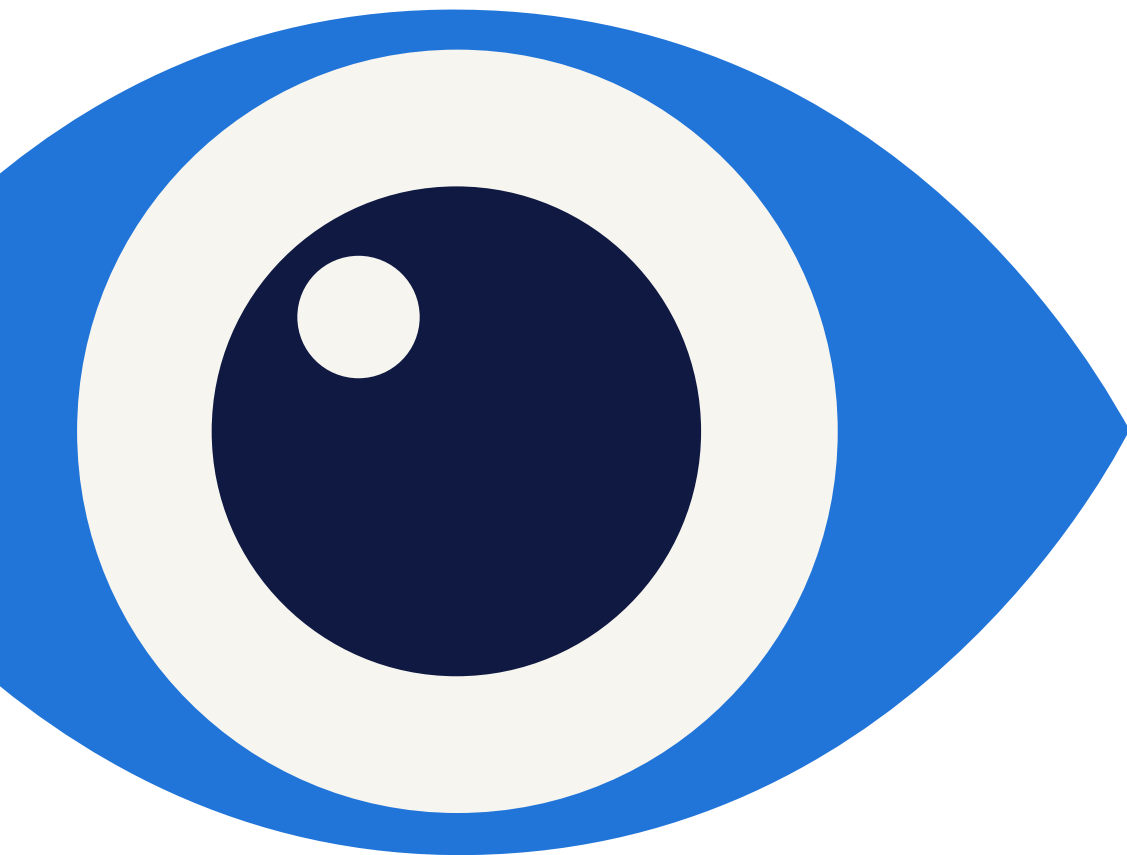
most important criteria



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



perception of employer offer in italy and the region.



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

employers in italy are perceived to offer.

- 1 financially healthy
- 2 very good reputation
- 3 uses latest technologies
- 4 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 italy.

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 work-life balance
 - 2 pleasant work atmosphere
 - 3 attractive salary & benefits
-



what do potential employees want by generational profile.

gen z (18-24)

56%

of the gen z's are looking for a pleasant work atmosphere. This is higher when compared to gen x and boomers.

gen x (35-54)

26%

of the gen x's find it important for their employer to be conveniently located. Among younger generations, this factor is deemed less important.

millennials (25-34)

42%

of the millennials seek career opportunities. Older generations are less interested in this offering from their employer.

boomers (55-64)

44%

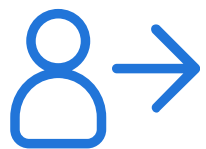
of the boomers are attracted to financially healthy employers. This is less so among the younger generations.



[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.

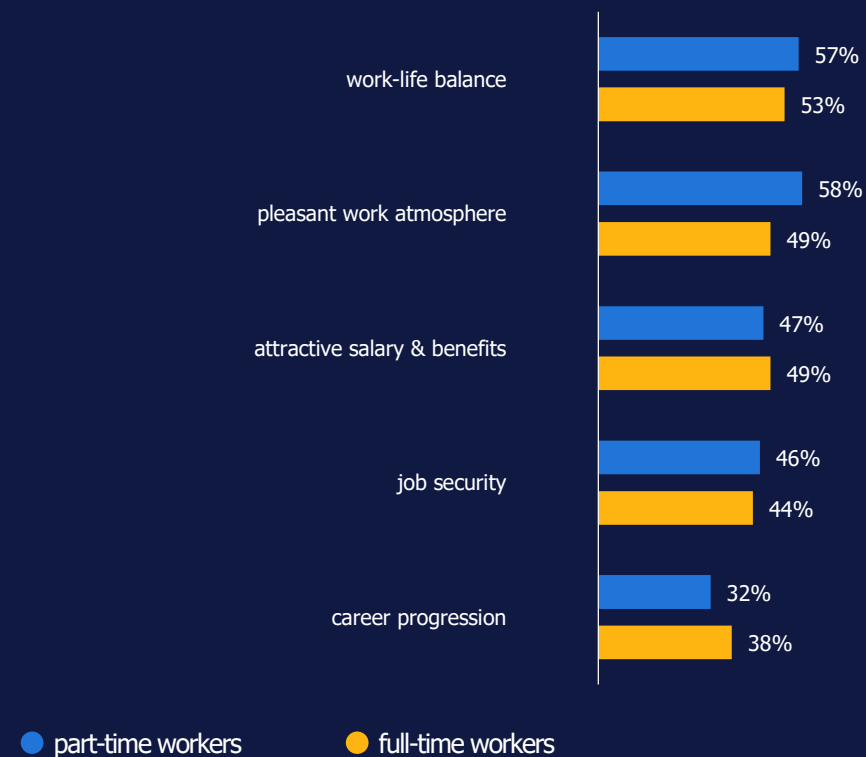


19%

of today's workforce
works part-time.

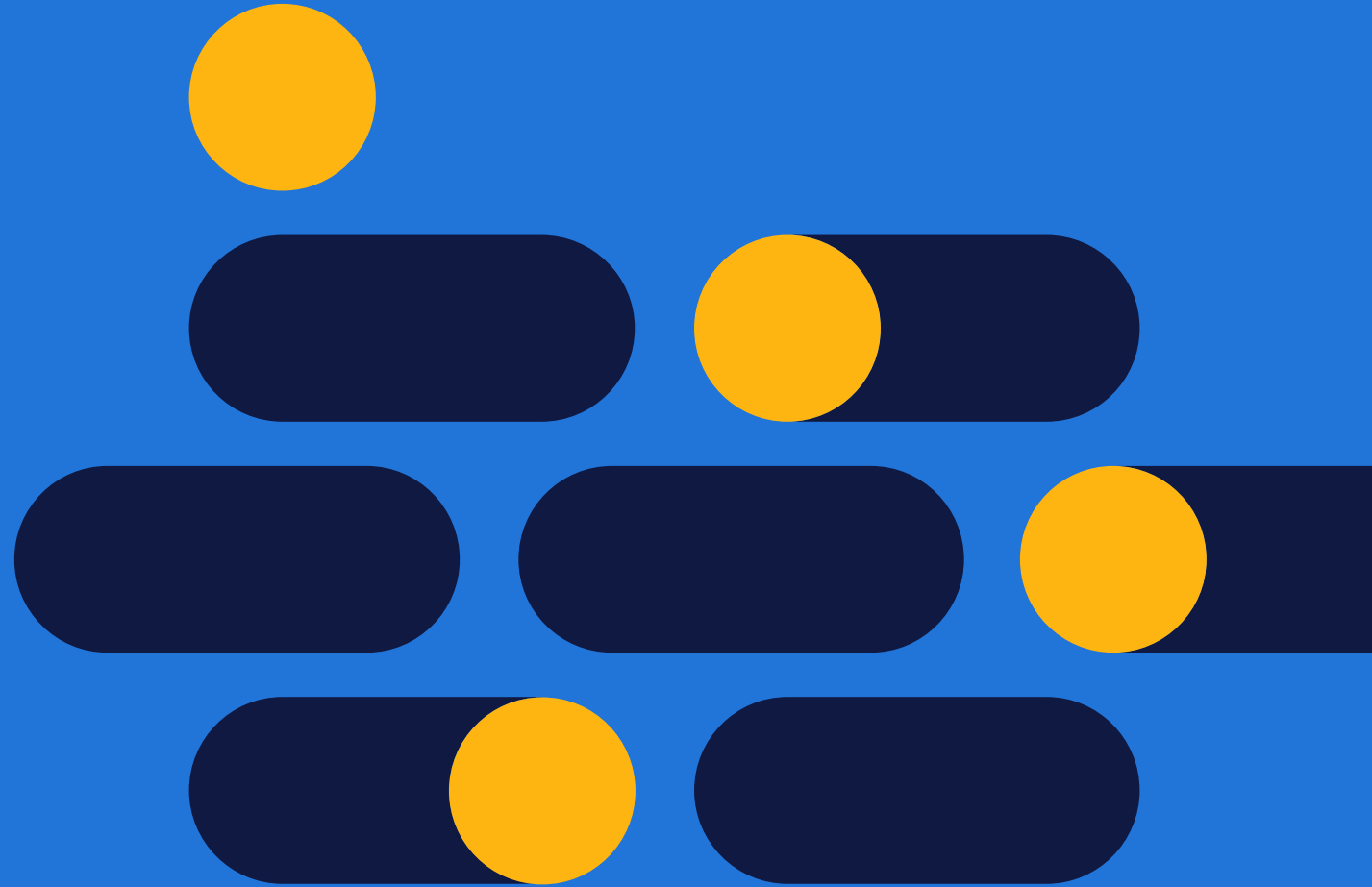


most important attributes



switchers and stayers

in focus.



changing employer italy vs europe.

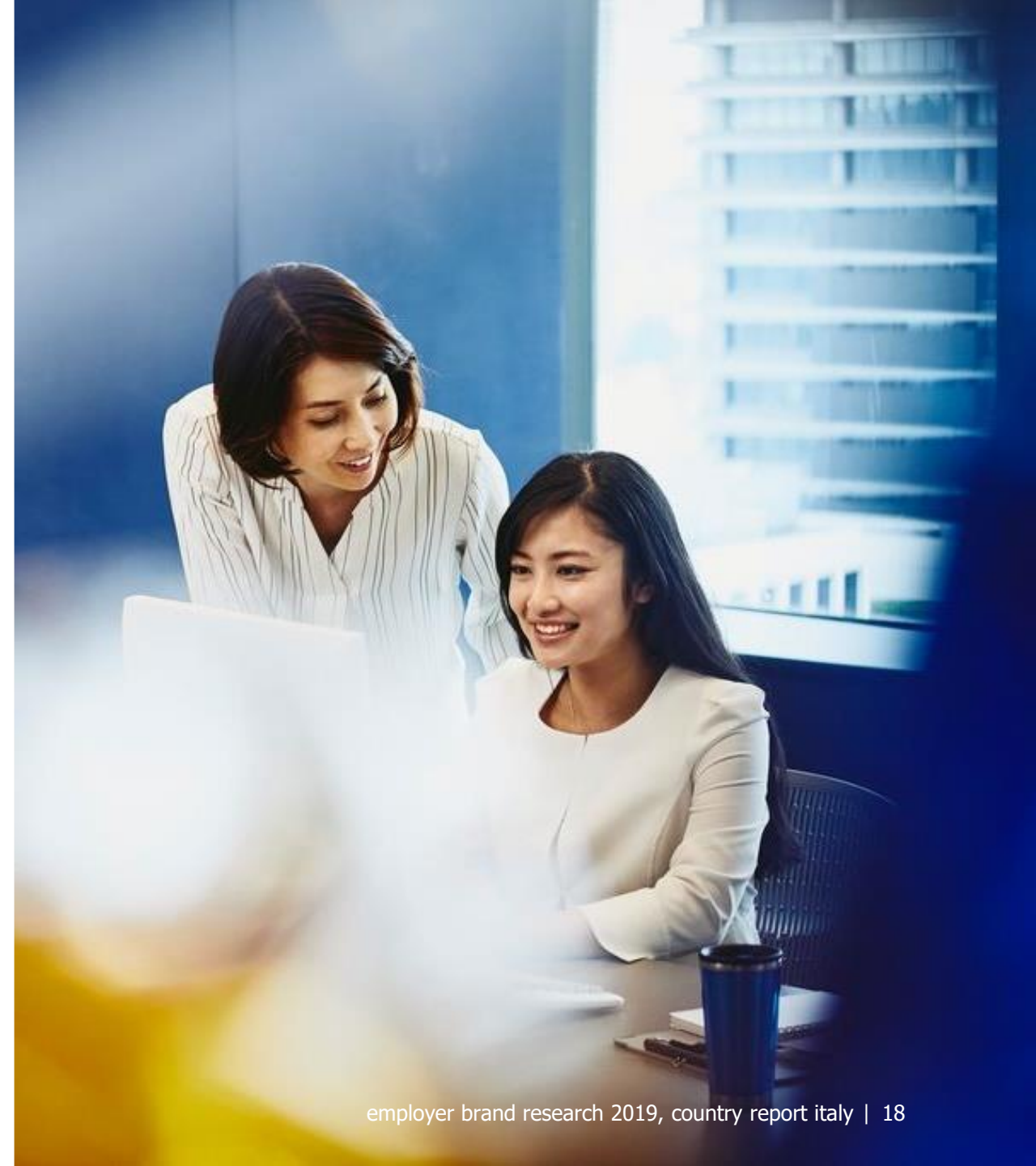
switchers: changed employer in the past year.



stayers: stayed with their employer in the past year.

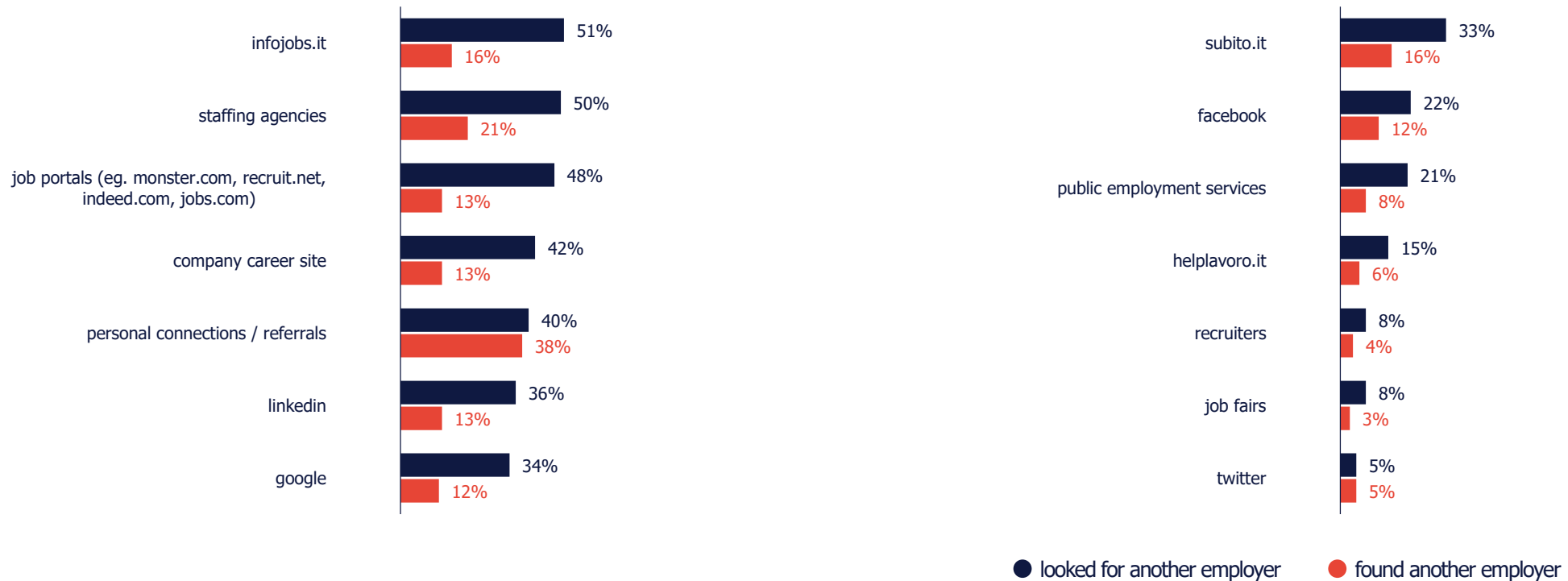


intenders: plan to change employer within the next year.

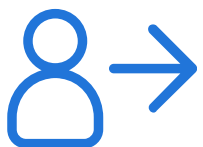


how do the italian workers look for and find employers.

channels used to look for and find employers



most important attributes switchers vs stayers.



16% (17%)*

switchers: changed
employer in
the past year.



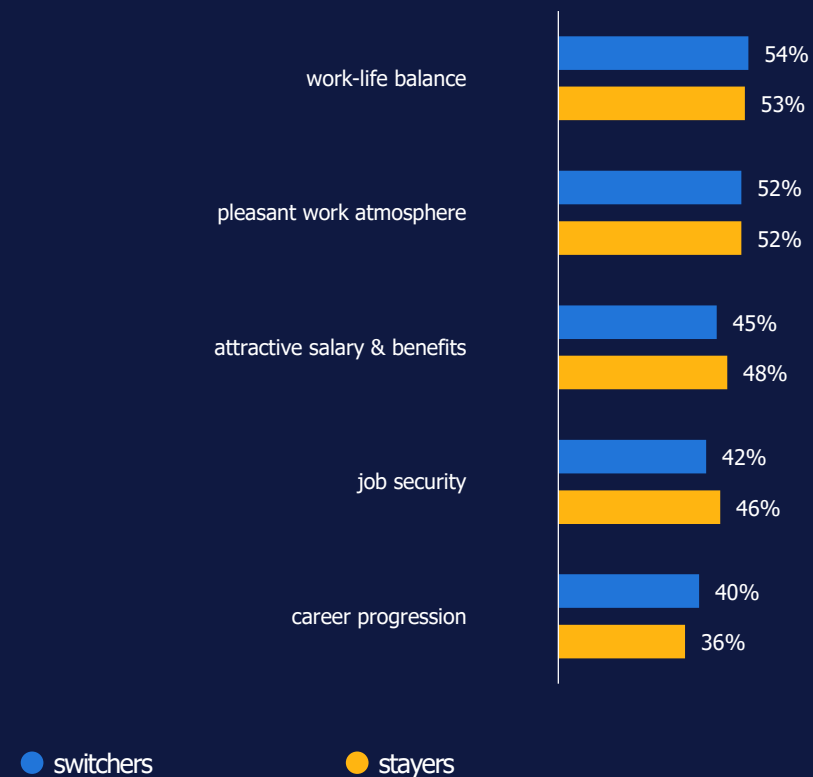
84% (83%)*

stayers: stayed with their
employer in the past year.

*in 2018



most important attributes



most important attributes intenders.



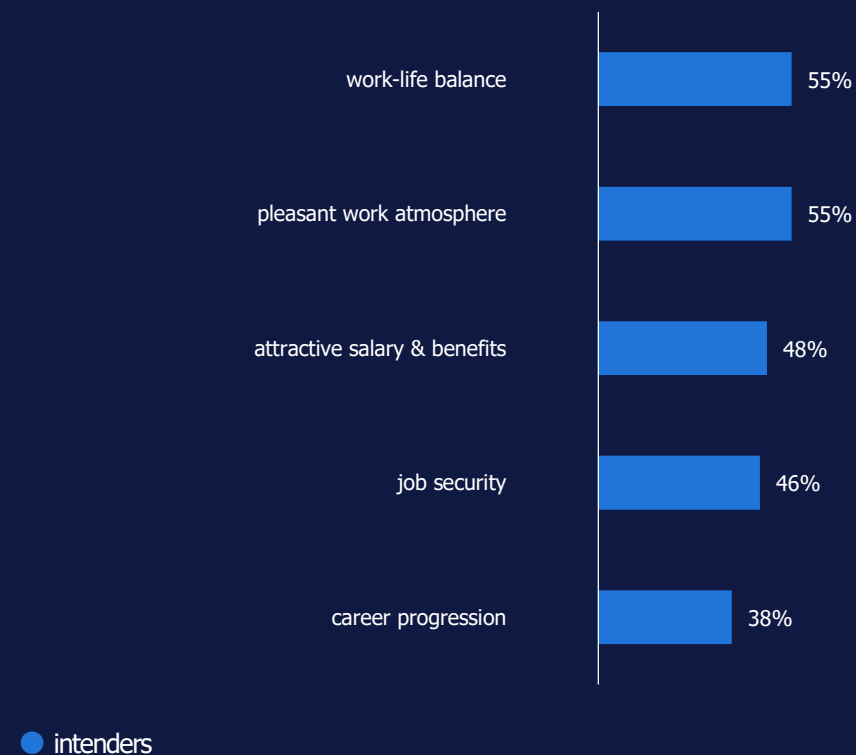
30% (32%)*

intenders: plan to
change employer
within the next year.

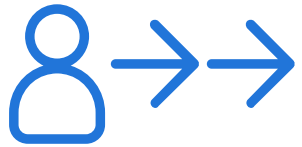
*in 2018



most important attributes



channels to look for employers intenders.



55% (57%)*

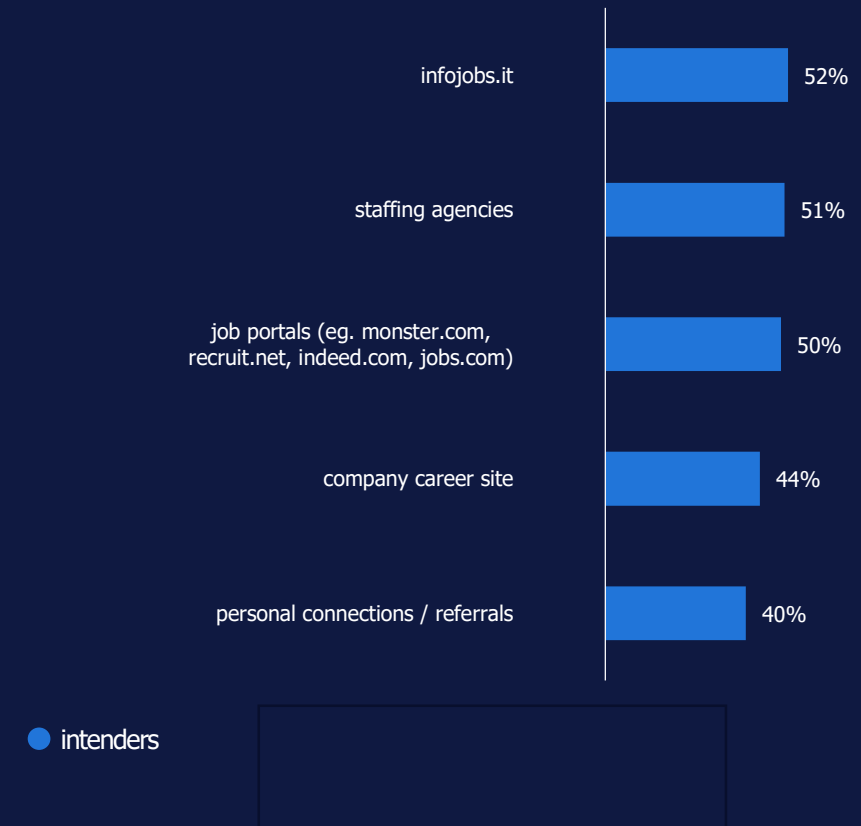
of last year's switchers**
intend to switch again
next year.

** n= 1,198 switched last year

*in 2018



channels to look for employers

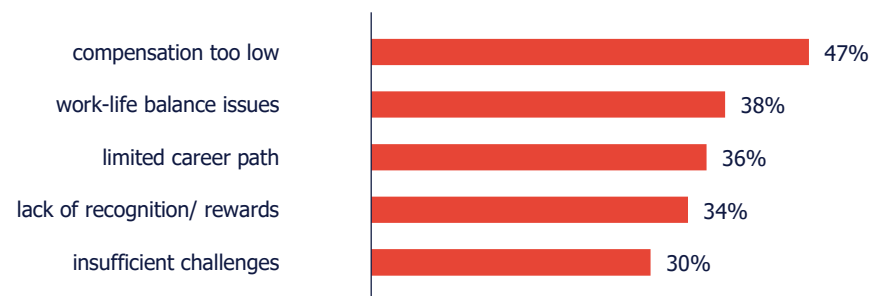


why do italians stay or leave.

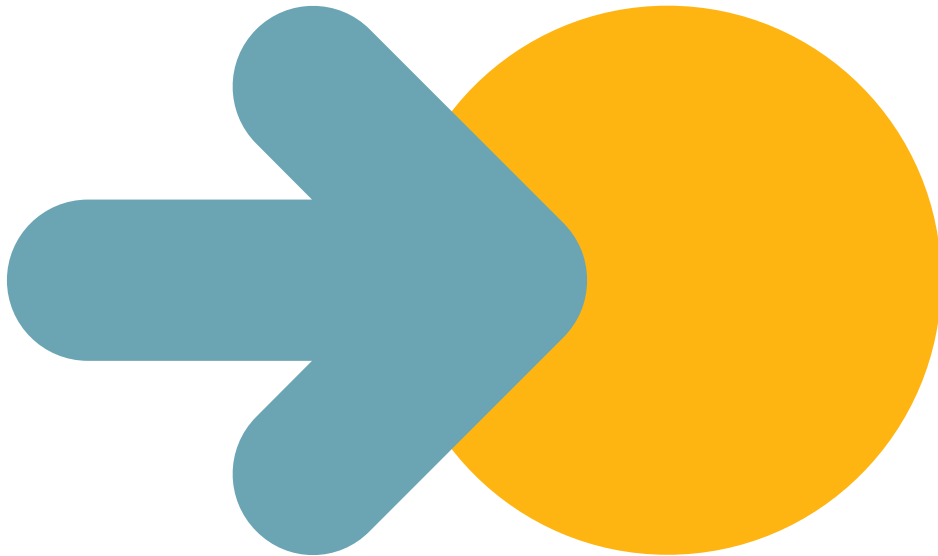
main reasons to stay



main reasons to leave



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



gen z (18-24)

34%

of the gen z's stay if they have career opportunities. This is higher when compared to older workforce.

gen x (35-54)

39%

of the gen x's stay with their employer if they are conveniently located. Among other generations, this factor is deemed less important.

millennials (25-34)

29%

of the millennials are staying if their employer offers good training. Older generations are less interested in this offering from their employer.

boomers (55-64)

46%

of the boomers are more likely to stay with their employer if they have a sense of job security. This is less so among the gen z's.

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

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

gen z (18-24)

43%

of the gen z's are leaving their employer if they lack career opportunities. This is higher when compared to millennials and gen x's.

gen x (35-54)

36%

of the gen x's leave their employer if they lack recognition or rewards. Compared to gen z, this factor is deemed less important among gen x.

millennials (25-34)

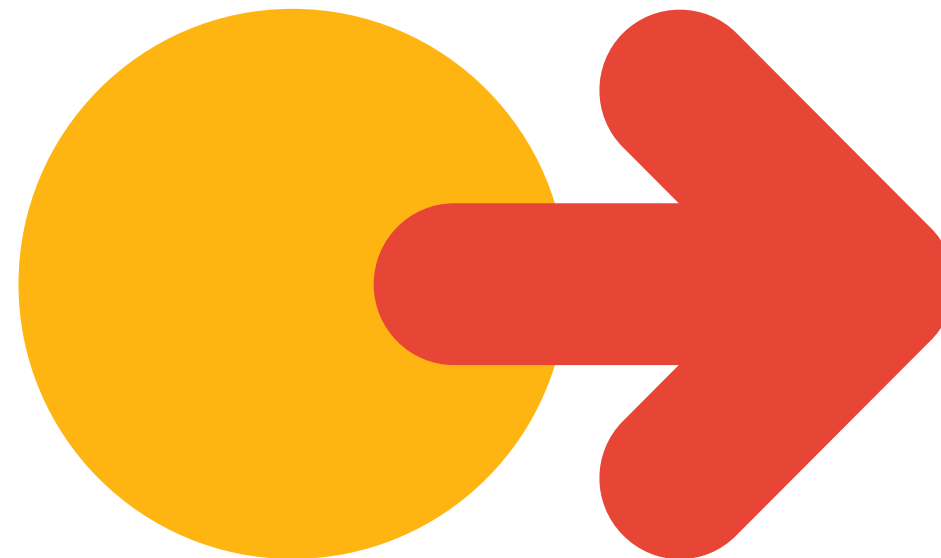
21%

of the millennials leave if they have a poor relationship with their direct manager.

boomers (55-64)

34%

of the boomers are leaving their employers if they have insufficient challenges in their job. Millennials and gen x do not find this as important.

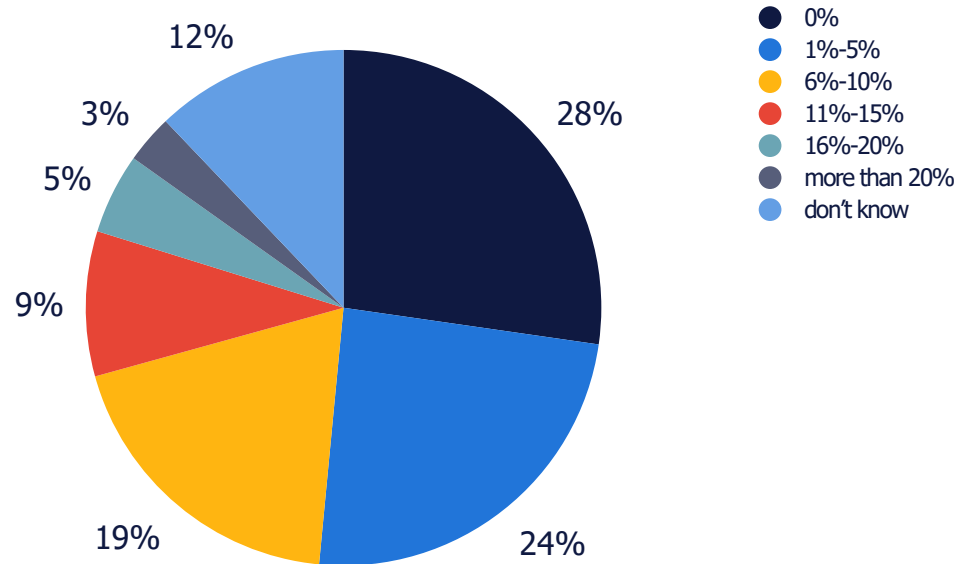


[click here](#) for a breakdown of all results.



willingness to forfeit salary for more work security.

amount of salary employees are willing to forfeit



italy

17%

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

europe

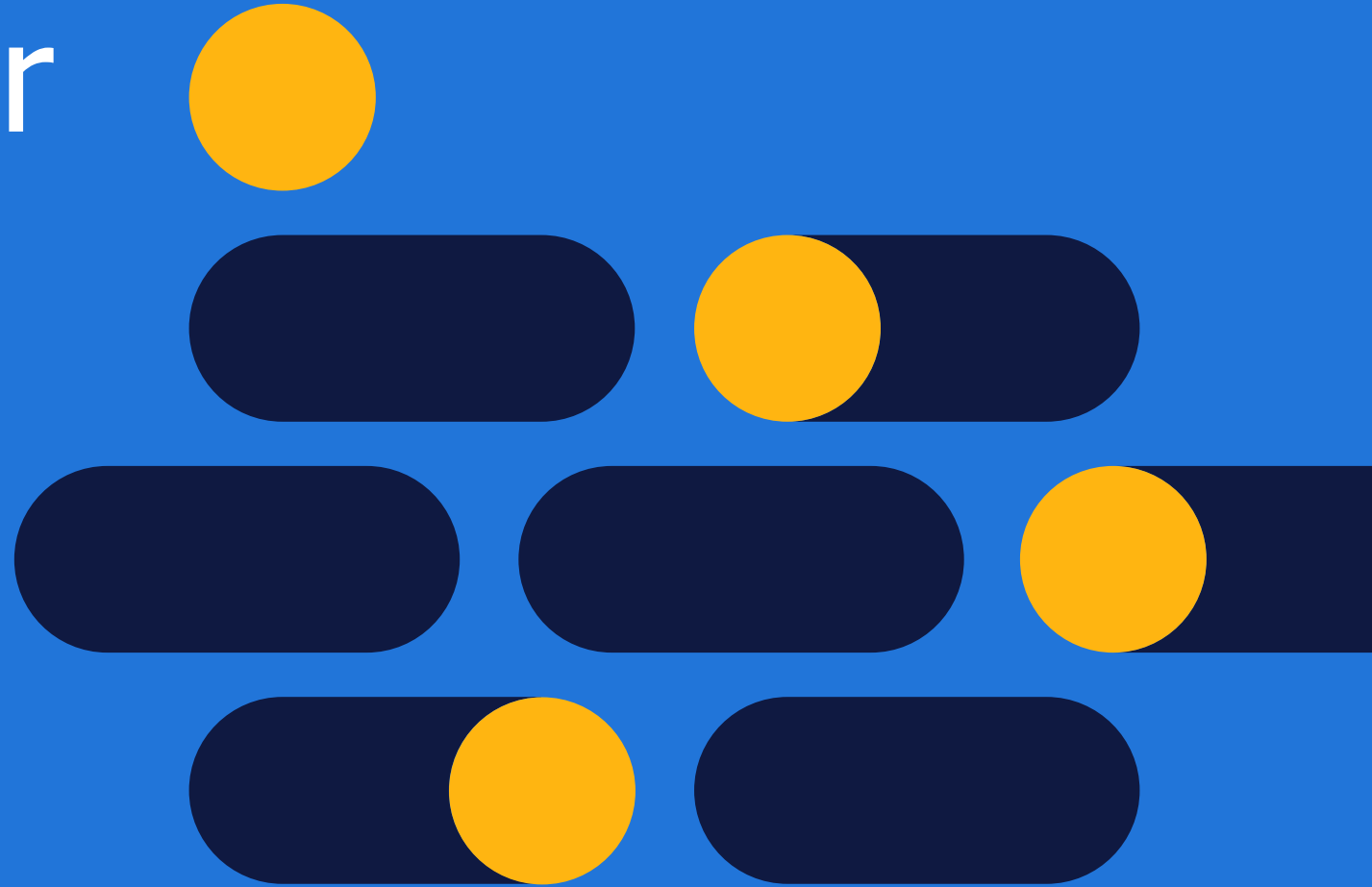
16%

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



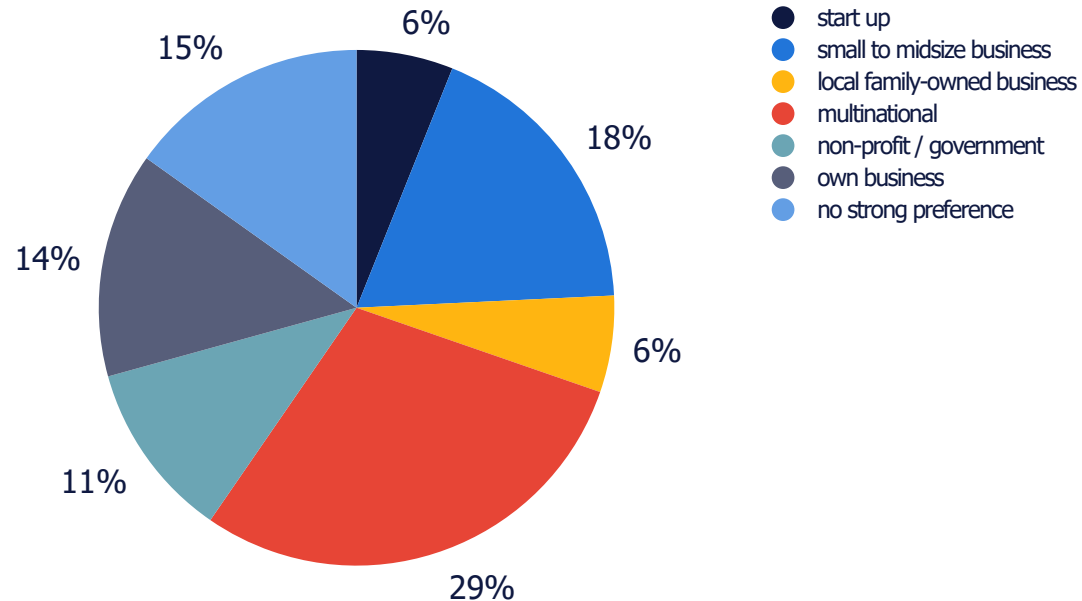
ideal employer

in focus.



29% of the italians prefer to work for a large (multinational) corporation.

preferred company type



gen z (18-24)

10%

would prefer to work for a start-up

gen x (35-54)

19%

would prefer to work for a small to midsize business

millennials (25-34)

32%

would prefer to work for a large (multinational) corporation

boomers (55-64)

19%

have no strong preference

company type preference

reasons why.

multinational (29%)

financial health

career progression

job security

small to midsize business (18%)

pleasant work atmosphere

work-life balance

flexible arrangements

own business (14%)

work-life balance

pleasant work atmosphere

flexible arrangements

non-profit / government (11%)

job security

work-life balance

financial health

start-up (6%)

interesting job content

pleasant work atmosphere

career progression

local family-owned (6%)

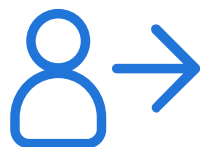
pleasant work atmosphere

work-life balance

flexible arrangements



company type preference switchers vs stayers.



25%

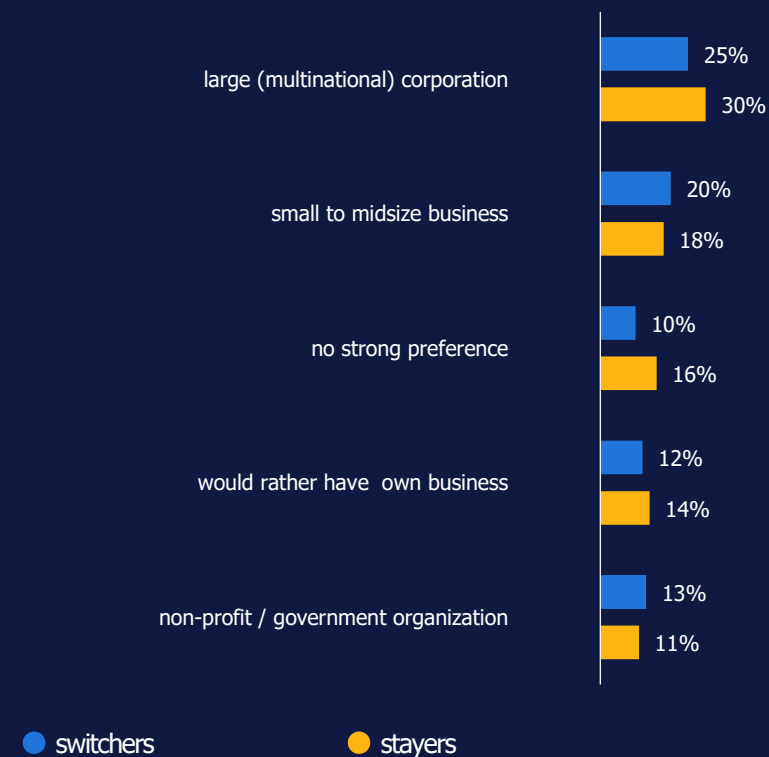
of the switchers prefer
to work for a large
(multinational)
corporation.



16%

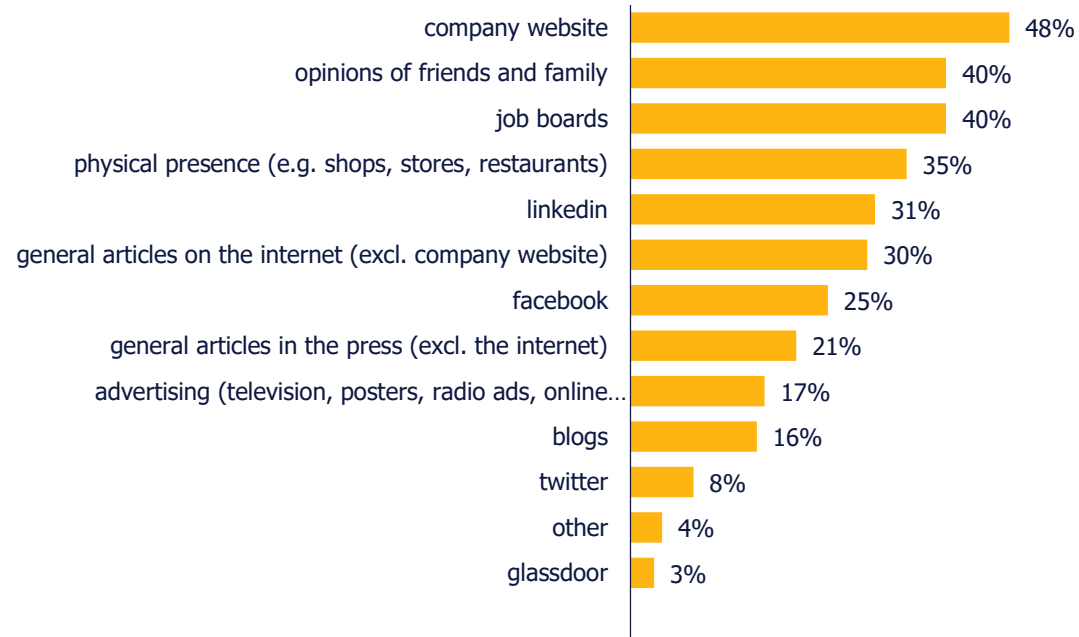
of the stayers have no
strong preference.

company type preference



88% of the italians check potential employer's reputation.

channels for reputation check



most often used

gen z (18-24)

29%

advertising

gen x (35-54)

39%

opinions of friends and family

millennials (25-34)

39%

linkedin

boomers (55-64)

33%

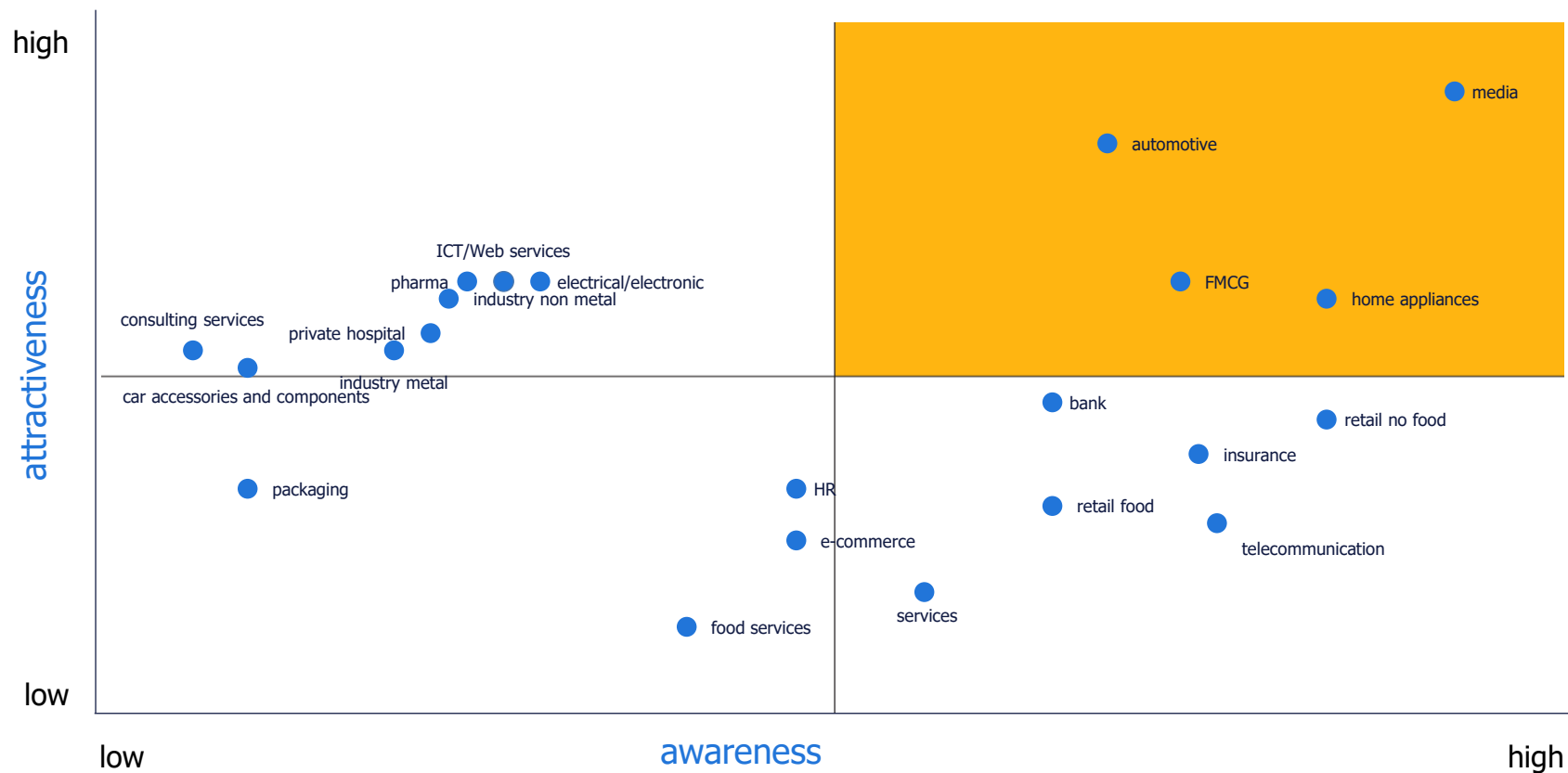
physical presence

sector



insights.

top performing sectors in italy 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.

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

1/3

		top 3 EVP drivers		
Sector		1	2	3
01	media	financially healthy	very good reputation	interesting job content
02	automotive	financially healthy	uses latest technologies	very good reputation
03	FMCG	financially healthy	very good reputation	job security
04	pharma	financially healthy	uses latest technologies	very good reputation
05	electrical/electronic	uses latest technologies	financially healthy	very good reputation
06	ICT/Web services	uses latest technologies	financially healthy	very good reputation
07	home appliances	financially healthy	uses latest technologies	very good reputation
08	industry non metal	financially healthy	very good reputation	uses latest technologies
09	private hospital	very good reputation	uses latest technologies	financially healthy
10	industry metal	uses latest technologies	financially healthy	very good reputation

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

2/3

		top 3 EVP drivers		
Sector		1	2	3
11	consulting services	financially healthy	uses latest technologies	career progression
12	car accessories and components	financially healthy	uses latest technologies	very good reputation
13	bank	financially healthy	career progression	job security
14	retail no food	financially healthy	very good reputation	uses latest technologies
15	insurance	financially healthy	very good reputation	career progression
16	packaging	very good reputation	financially healthy	uses latest technologies
17	HR	financially healthy	very good reputation	uses latest technologies
18	retail food	financially healthy	very good reputation	job security
19	telecommunication	financially healthy	uses latest technologies	very good reputation
20	e-commerce	financially healthy	uses latest technologies	very good reputation



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

3/3

		top 3 EVP drivers		
Sector		1	2	3
21	services	financially healthy	uses latest technologies	very good reputation
22	food services	financially healthy	very good reputation	job security

top



employers.

top employers in italy.

top 10 employers 2019

- 01 Ferrero
 - 02 BMW
 - 03 Lamborghini
 - 04 Thales Alenia Space Italia
 - 05 Feltrinelli
 - 06 Maserati
 - 07 Mondadori
 - 08 Rai
 - 09 Avio Aero (GE Aviation business)
 - 10 Coca Cola
-

top 10 employers 2018

- 01 Maserati
 - 02 Lamborghini
 - 03 Freni Brembo
 - 04 Feltrinelli
 - 05 Philips
 - 06 Mondadori
 - 07 BMW
 - 08 Mediaset
 - 09 Thales Alenia Space Italia
 - 10 Ducati
-

italy's top companies

top 3 EVP drivers of the top 5 companies.

	top 3 EVP drivers		
top 5 companies	1	2	3
1 Ferrero	financially healthy	very good reputation	job security
2 BMW	financially healthy	uses latest technologies	very good reputation
3 Lamborghini	financially healthy	uses latest technologies	very good reputation
4 Thales Alenia Space Italia	uses latest technologies	financially healthy	very good reputation
5 Feltrinelli	very good reputation	financially healthy	interesting job content

top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	Lamborghini	Maserati	BMW
career progression	PriceWaterhouseCoopers	Reconta Ernst & Young	Thales Alenia Space Italia
financially healthy	Coca Cola	Ferrero	Lamborghini
gives back to society	Ferrero	Tetra Pak	IKEA
interesting job content	Thales Alenia Space Italia	Lamborghini	Maserati
job security	Ferrero	BMW	Coca Cola
pleasant work atmosphere	Ferrero	Lamborghini	Maserati
uses latest technologies	Lamborghini	Maserati	STMicroelectronics
very good reputation	Ferrero	Lamborghini	Maserati
work-life balance	Ferrero	Thales Alenia Space Italia	Lamborghini

deep dive

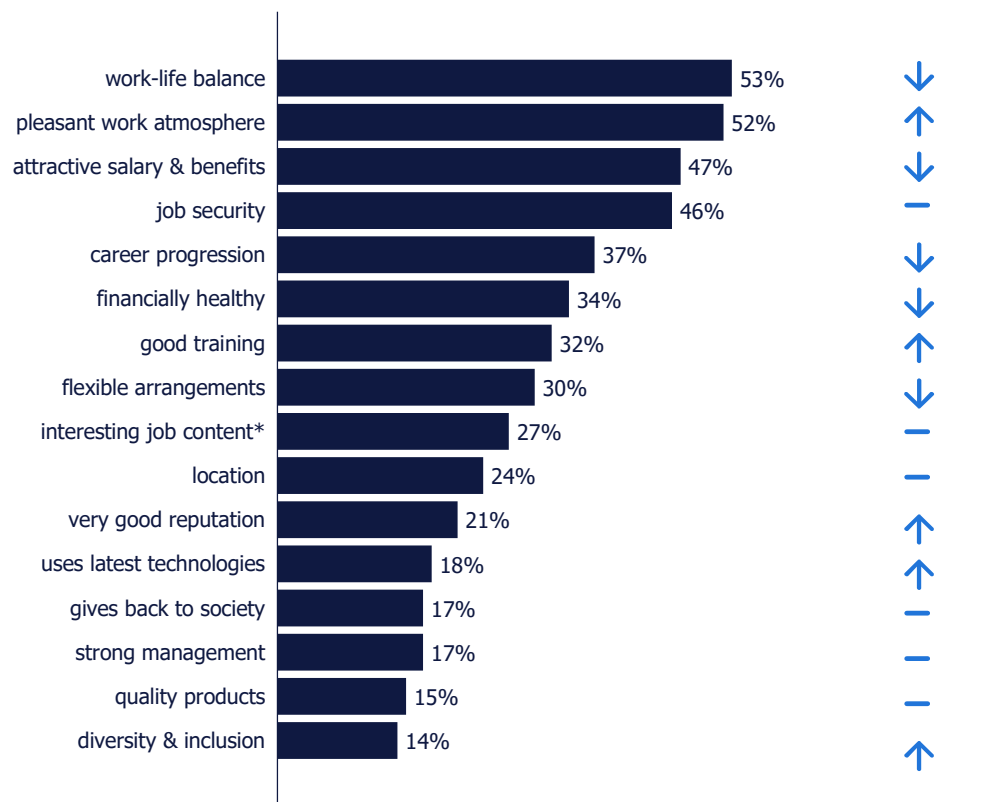
appendix 1.



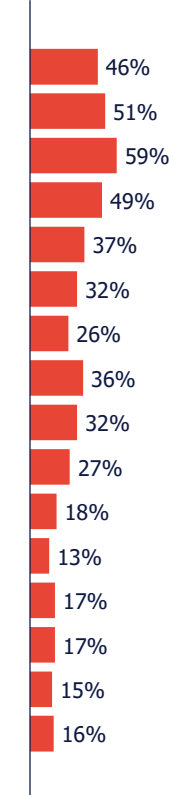
what potential employees want

the most important criteria when choosing an employer.

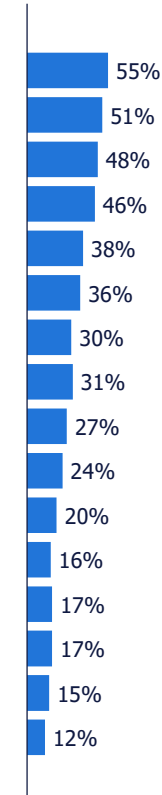
important criteria



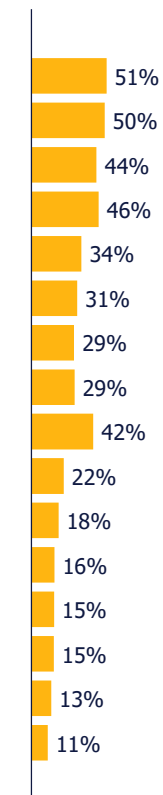
europe



2018



2017

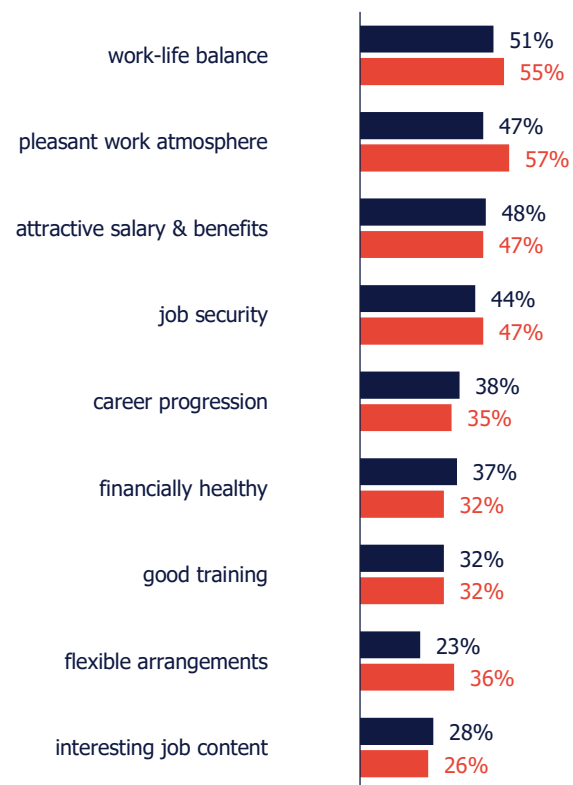


Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.

*2017: work that is stimulating and challenging

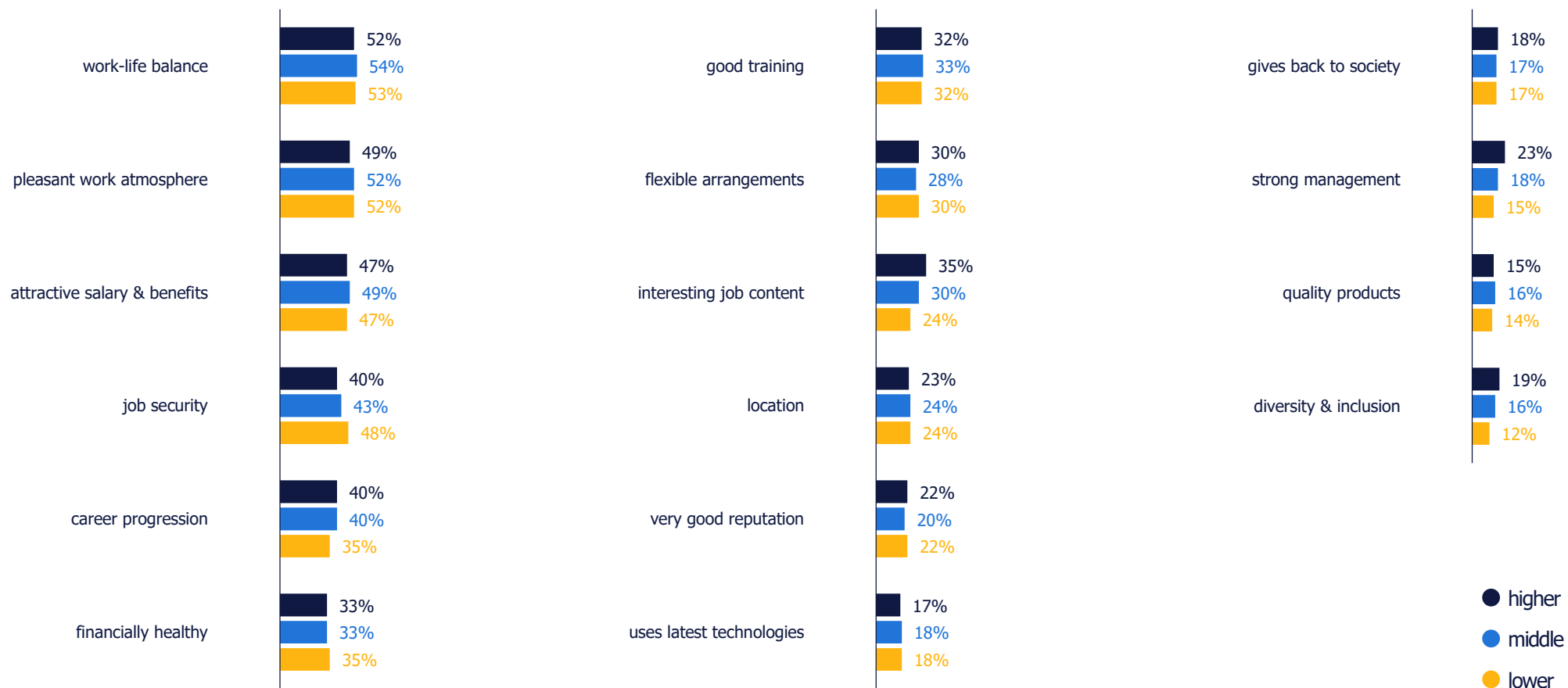


EVP driver importance by gender.

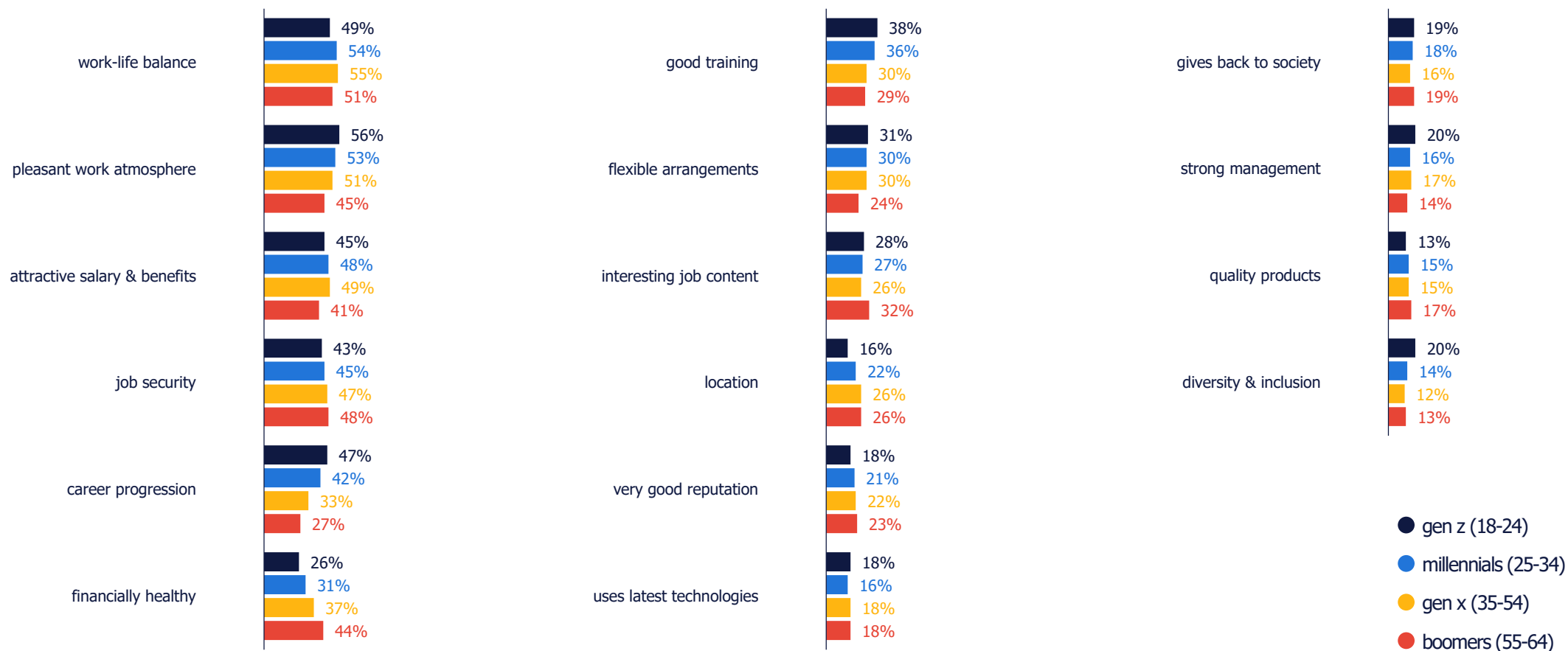


● male
● female

EVP driver importance by education.



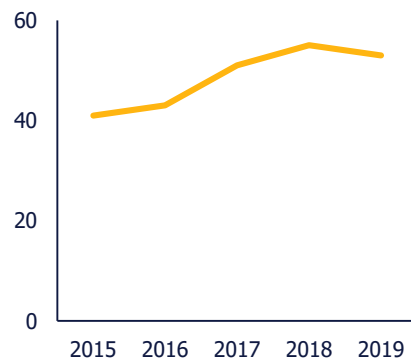
EVP driver importance by age.



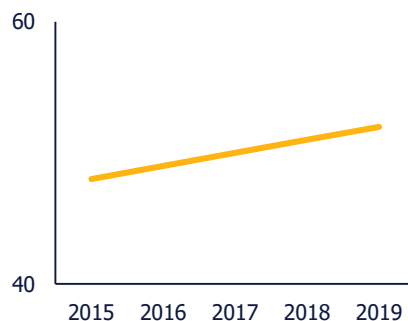
EVP driver importance trends, total.

1/2

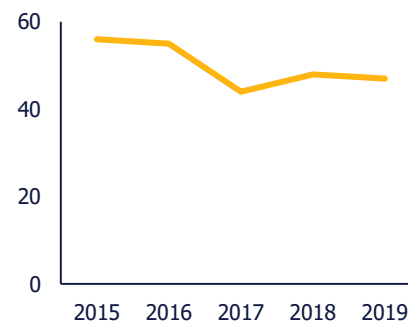
work-life balance



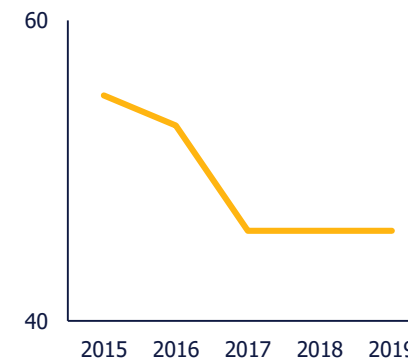
pleasant work atmosphere



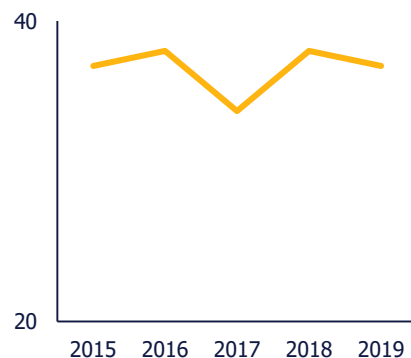
attractive salary & benefits



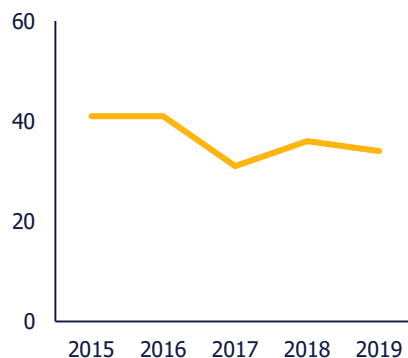
job security



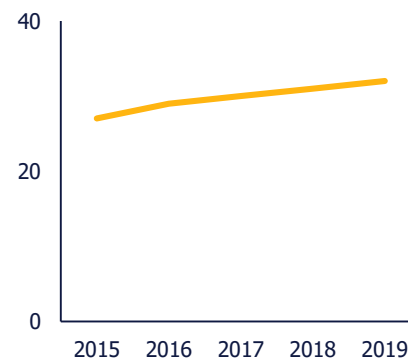
career progression



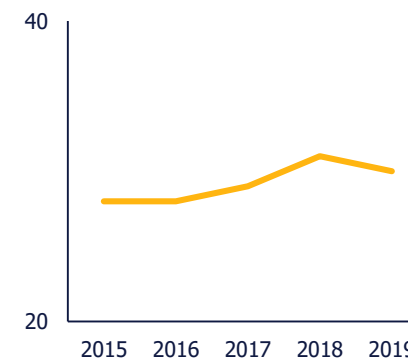
financially healthy



good training



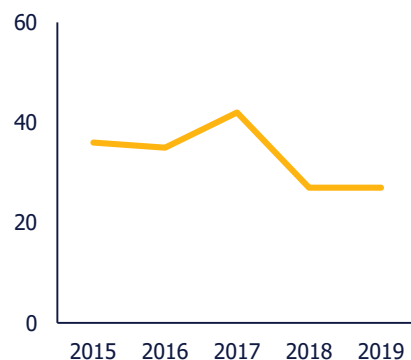
flexible arrangements



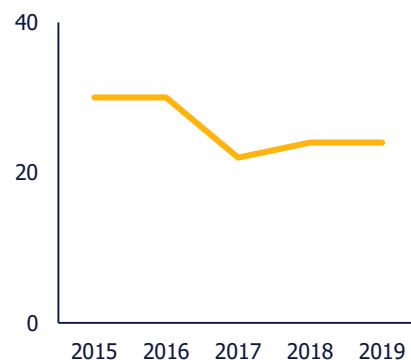
EVP driver importance trends, total.

2/2

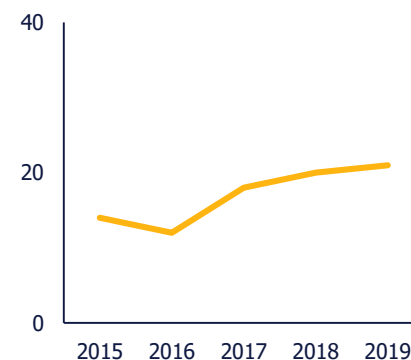
interesting job content*



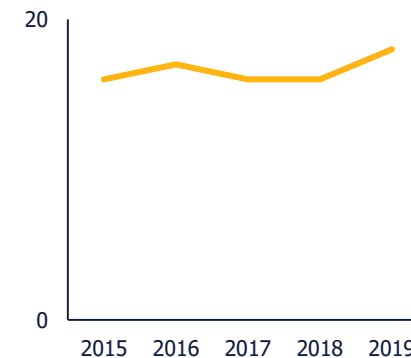
location



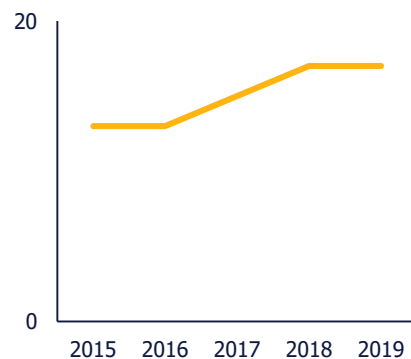
very good reputation**



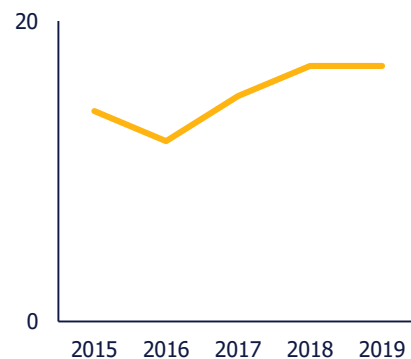
uses latest technologies



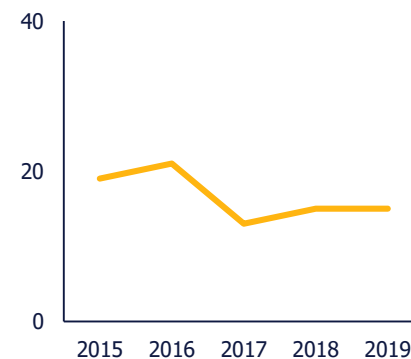
gives back to society



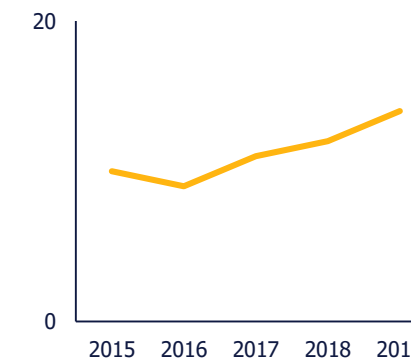
strong management



quality products



diversity & inclusion

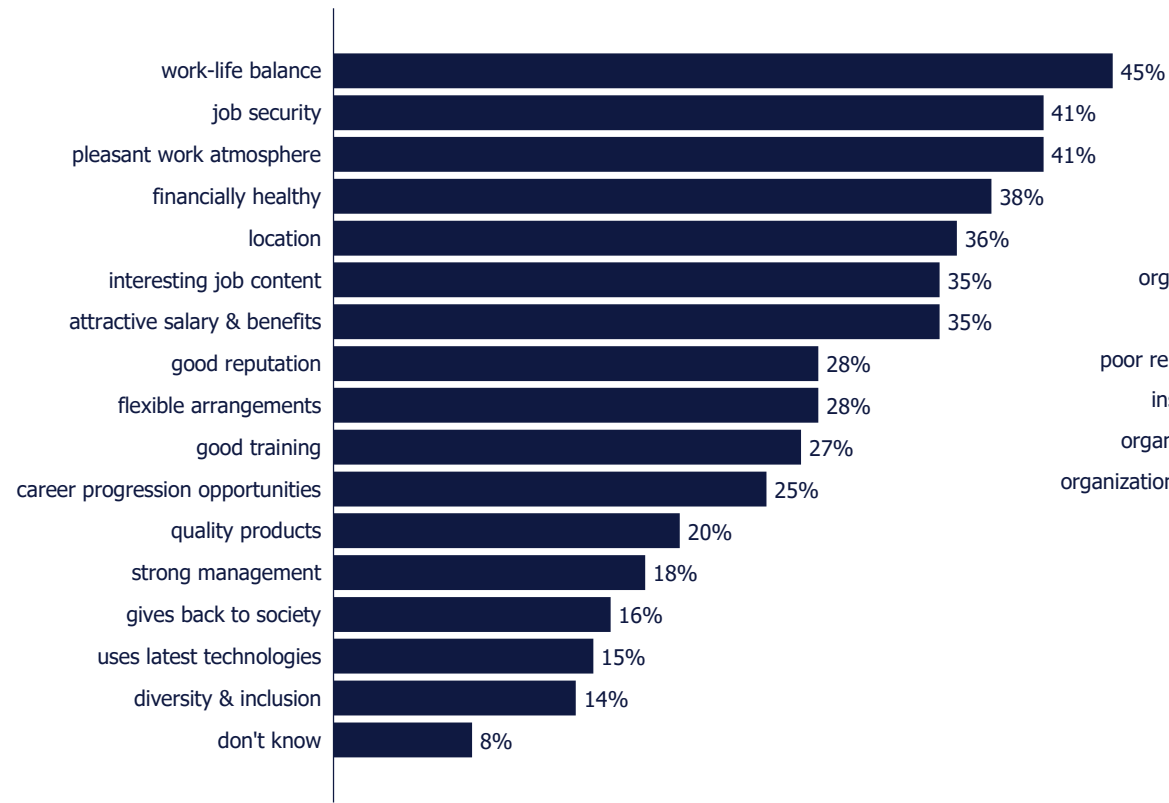


*2017: work that is stimulating and challenging
 **previous to 2017: strong image/strong values

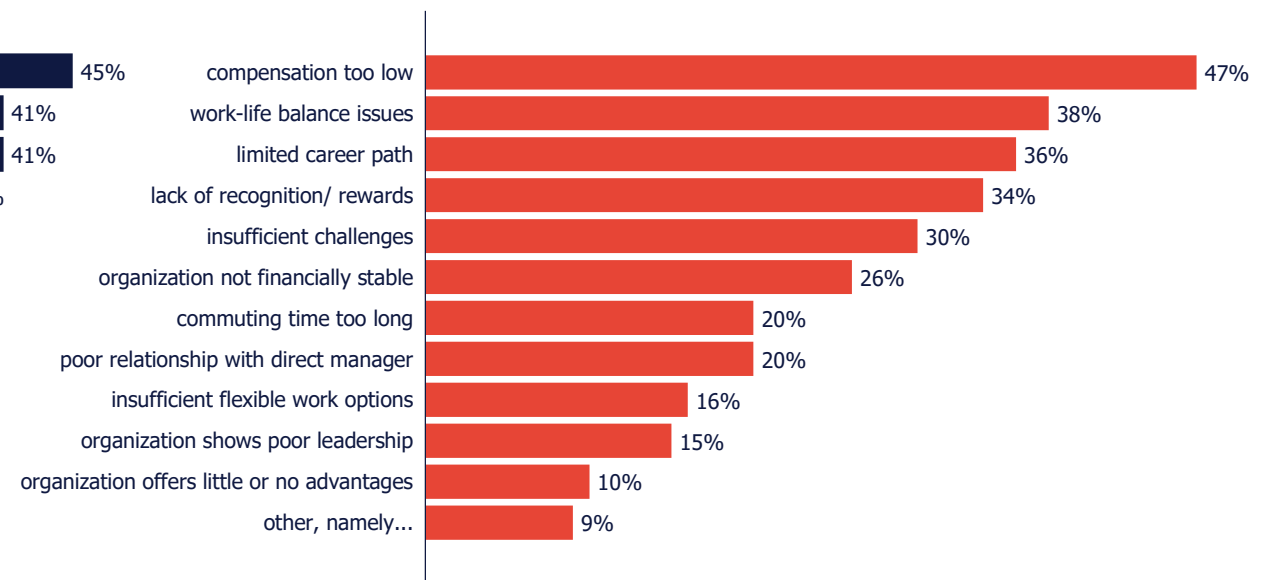


what factors do the italians stay or leave for.

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.

