

employer  
brand research  
2019



country report  
the netherlands.

 randstad

human forward.

# contents.

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



# introduction.



# why employer branding matters.



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

50%

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

96%

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

80%

of workforce leaders agree that a strong employer brand has a significant impact on their ability to hire great workforce.<sup>2</sup> As people work for cultures, not companies, their perception of you as an employer is of paramount importance. Both recruiters and candidates cite company culture as one of the most important determinants in employer choice. Also, if your culture is transparent: candidates actively research the culture of companies to understand if they'll fit. If candidates see positive employee and candidate experiences on review sites, they feel more confident submitting their resume and making a career move.

70%

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

62%

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



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

67%

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

76%

Employees who experience a strong alignment between what their employer says about itself and their experience working there are more likely to recommend their employer as a place to work.<sup>7</sup>

# the employer brand roadmap.



# what is the randstad employer brand research?

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



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

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



● countries surveyed

## worldwide

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

## sample

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

## country

- 17,828 respondents

## fieldwork

- online interviews
- between 3 and 16 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.





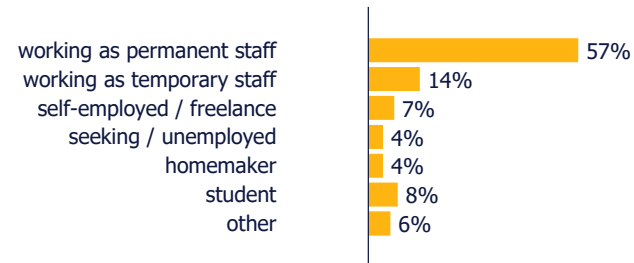
# sample composition in the netherlands

## socio-demographics, employment situation, region.

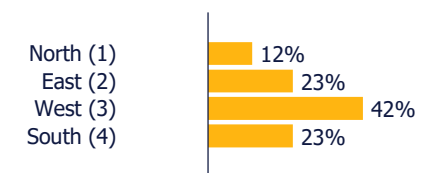
### gender



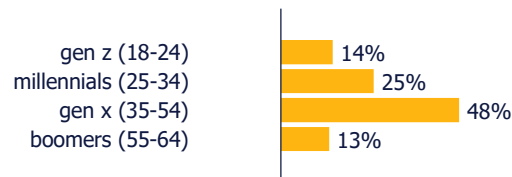
### situation



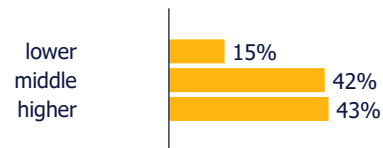
### region



### age



### education



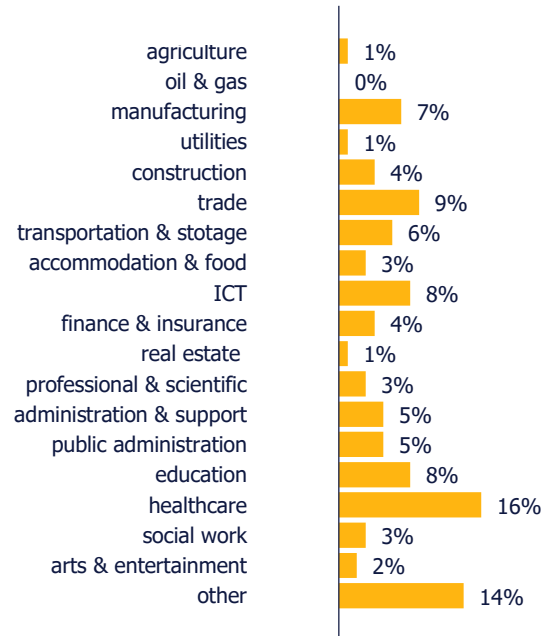
1. Drenthe, Friesland, Groningen
2. Flevoland, Gelderland, Overijssel
3. Noord-Holland, Utrecht, Zuid-Holland
4. Limburg, Noord-Brabant, Zeeland

total sample: 17,828  
fieldwork: between 3 and 16 january 2019

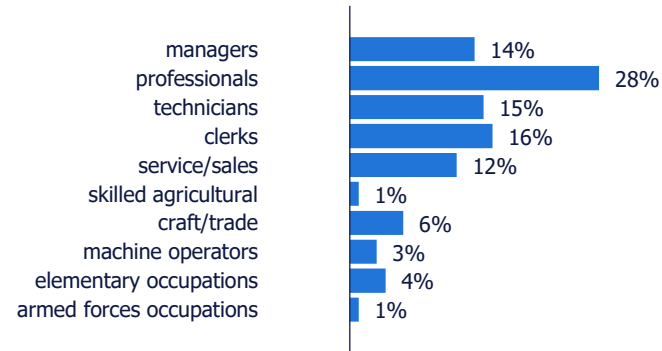


# sample composition in the netherlands

## sector



## function

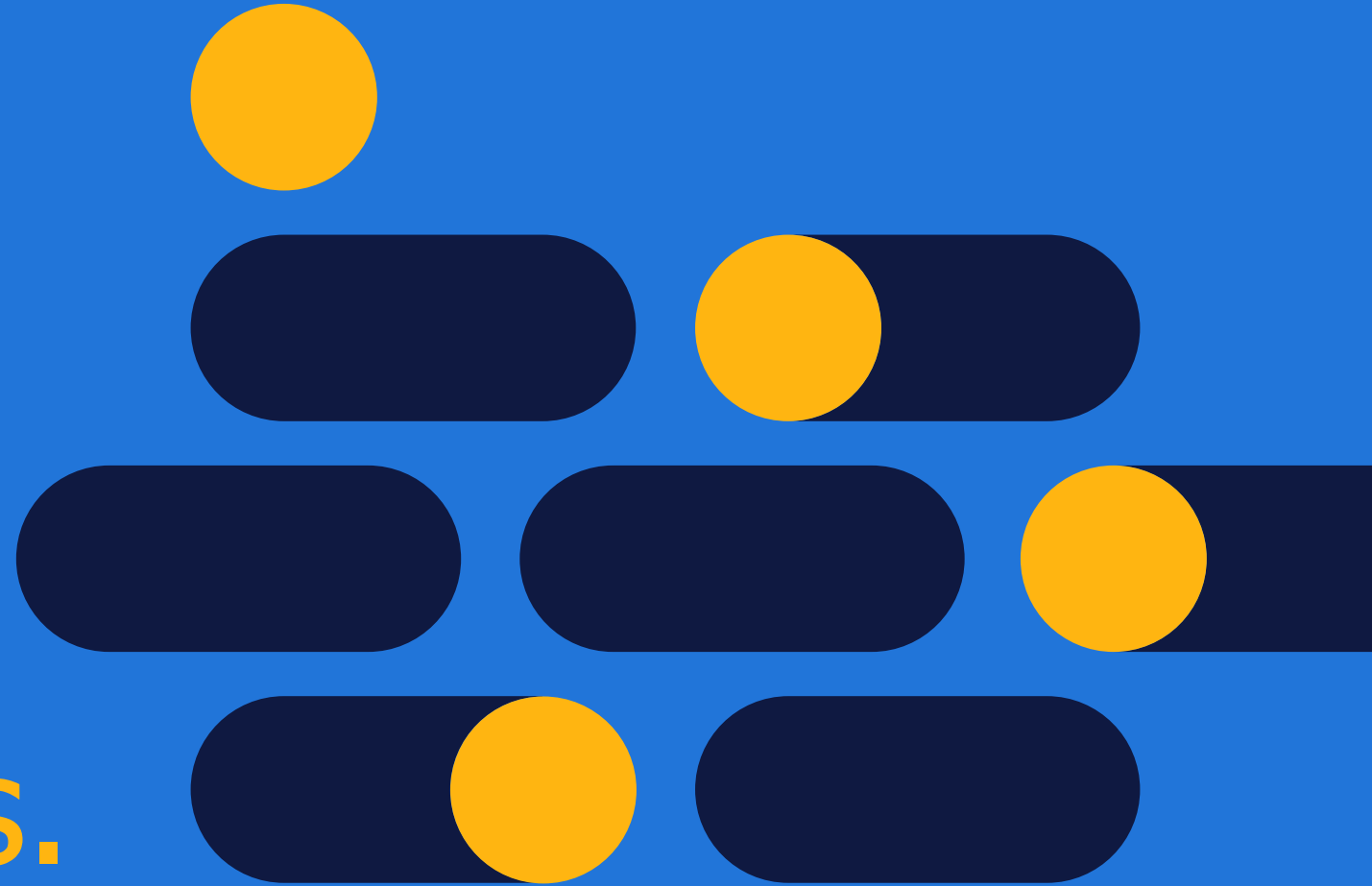


base: currently employed (n=13,960)



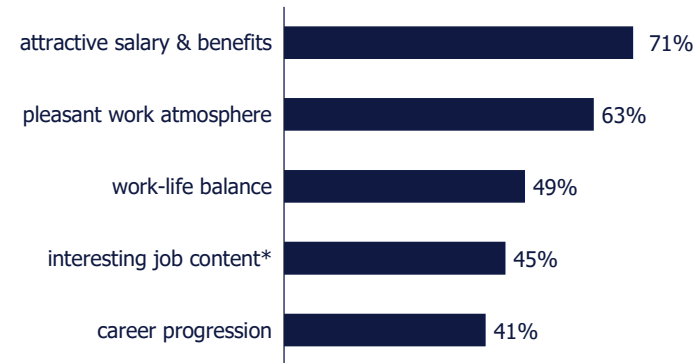
country

EVP drivers.



# what potential employees want when choosing an employer.

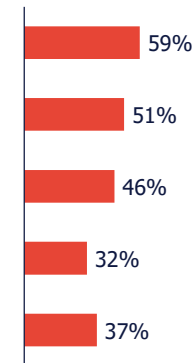
## most important criteria



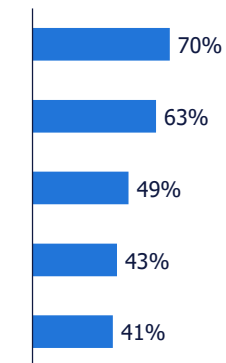
versus 2018



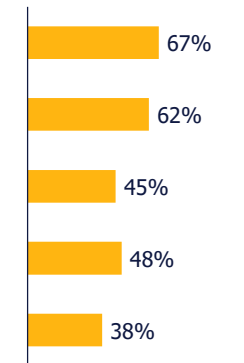
europa



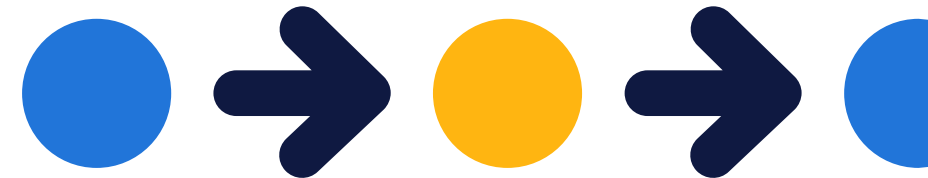
2018



2017

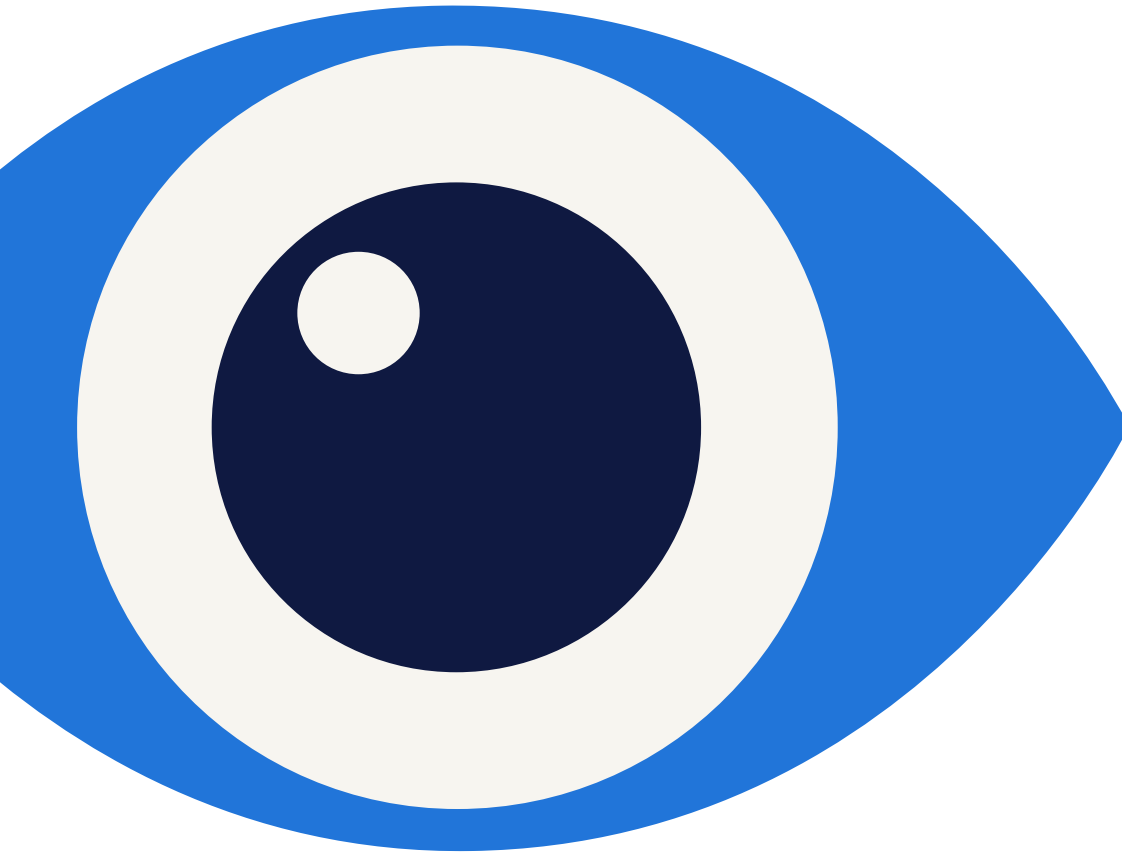


[click here](#) for a breakdown of all results by socio-demographic profile and trends for the last 5 years.



\* in 2017, this aspect was asked differently: "work that is stimulating and challenging"

# perception of employer offer in the netherlands and the region.



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

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## employers in the netherlands are perceived to offer

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

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 pleasant work atmosphere
  - 3 work-life balance
- 



# what do potential employees want by generational profile.

gen z (18-24)

56%

of the gen z's are looking for career progression in their employer. This is higher when compared to older workforce.

gen x (35-54)

54%

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

millennials (25-34)

64%

of the millennials seek a pleasant work atmosphere. Gen x is less interested in this offering from their employer.

boomers (55-64)

44%

of the boomers find convenient location as a very important attribute in their ideal employer. This is less so among the other cohorts.



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



# important attributes by type of contract.

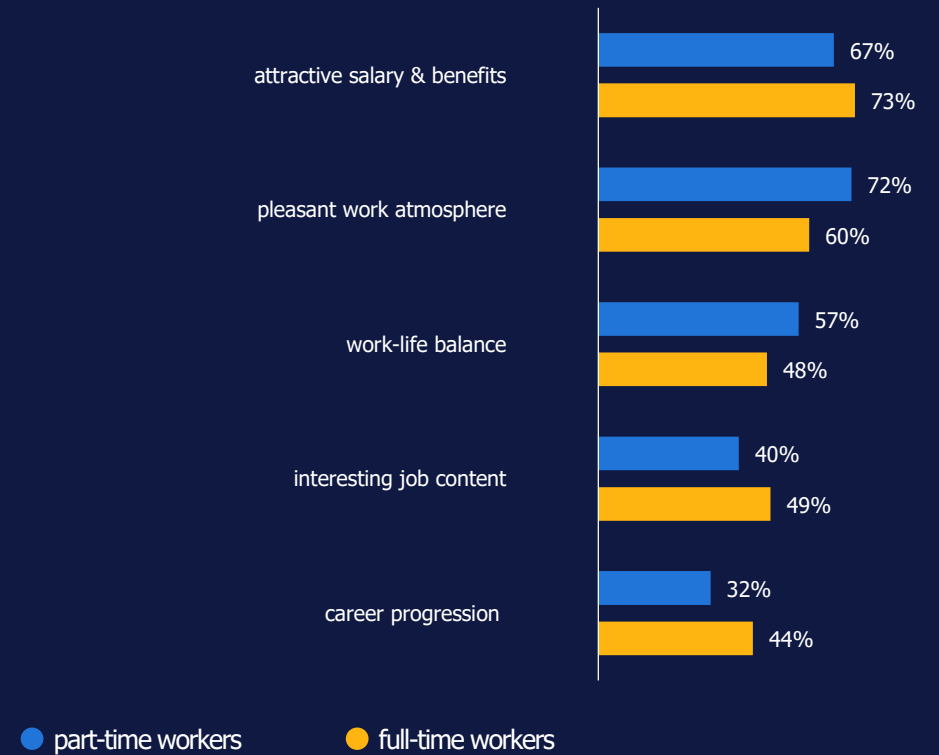


27%

of today's workforce  
works part-time.



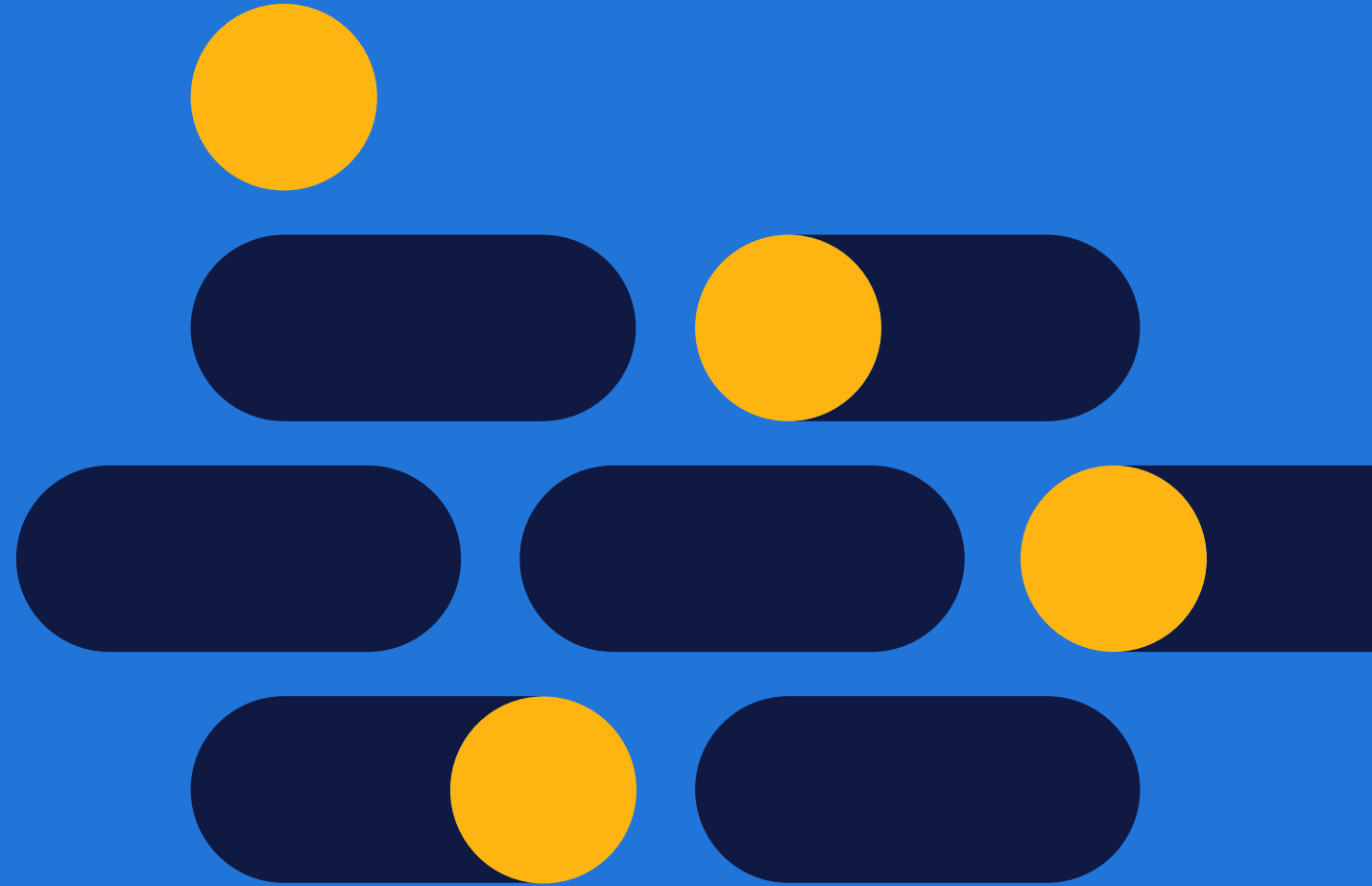
## most important attributes





# switchers and stayers

in focus.



# changing employer the netherlands vs europe.

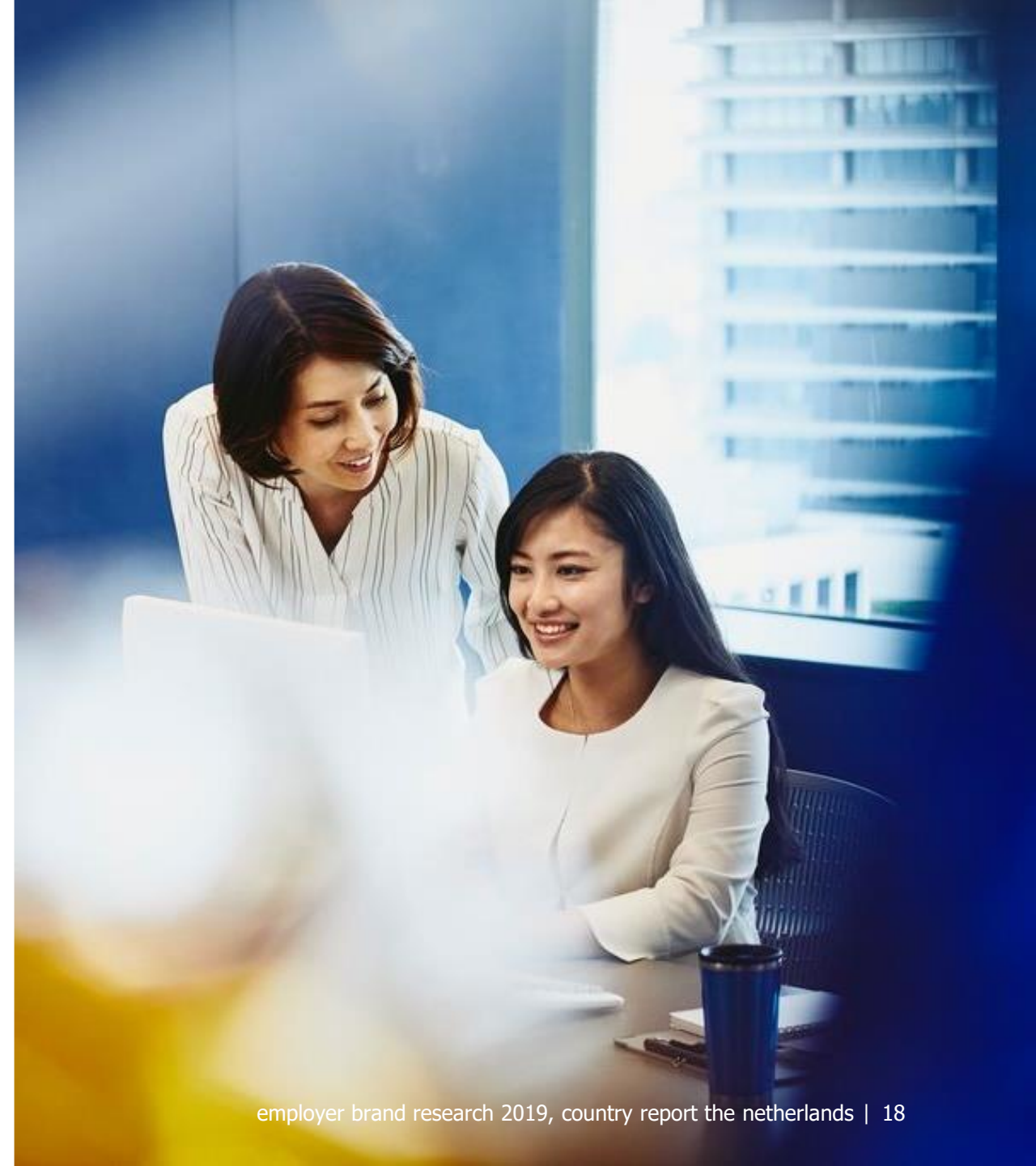
**switchers:** changed employer in the past year.



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

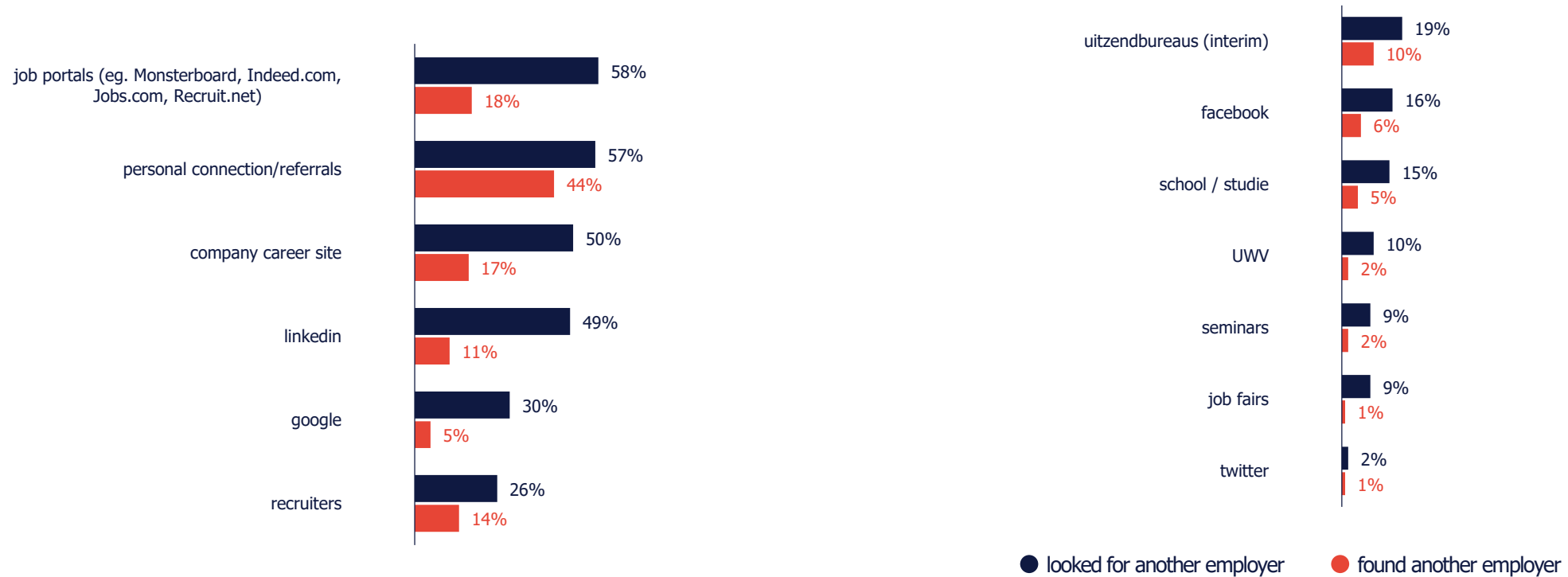


**intenders:** plan to change employer within the next year.



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

## channels used to look for and find employers



# most important attributes switchers vs stayers.



**15%** (13%)\*

switchers: changed employer in the past year.



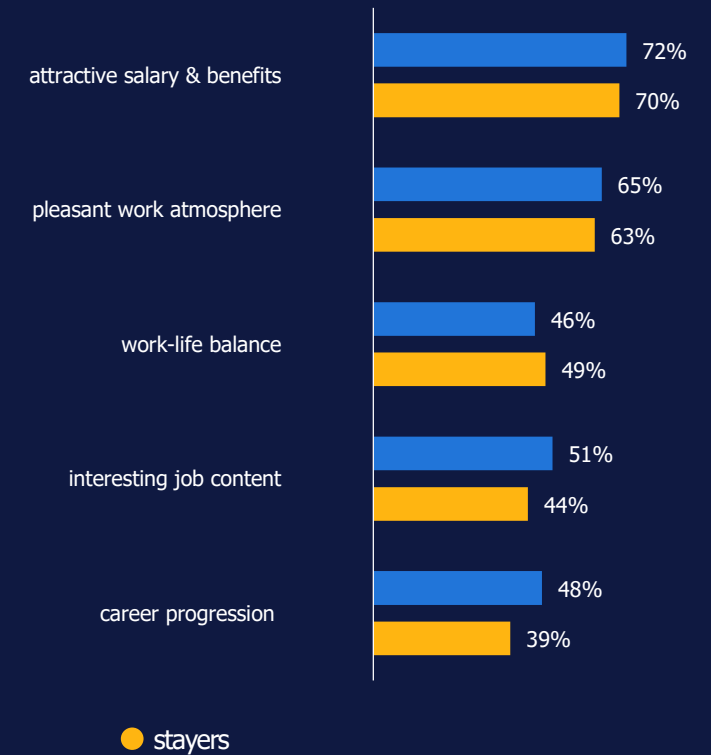
**85%** (87%)\*

stayers: stayed with their employer in the past year.

\*in 2018



## most important attributes



# most important attributes intenders.



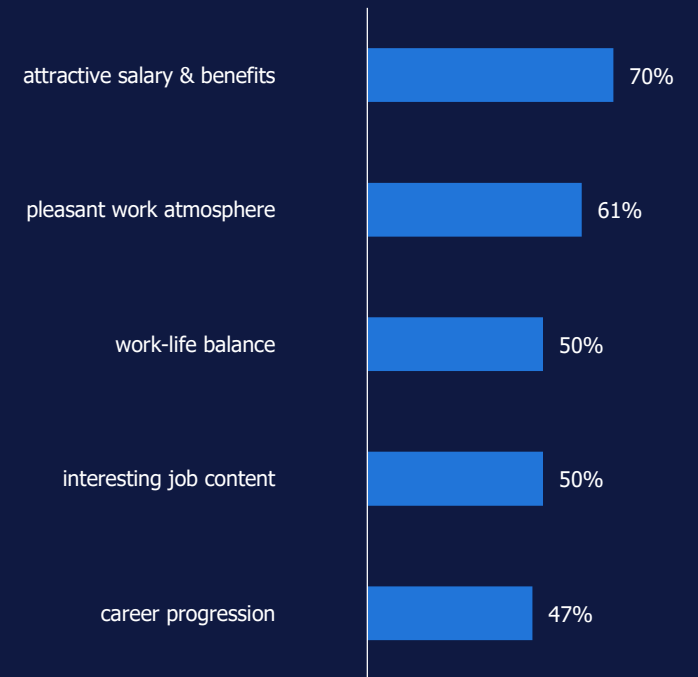
18% (17%)\*

intenders: plan to  
change employer  
within the next year.

\*in 2018

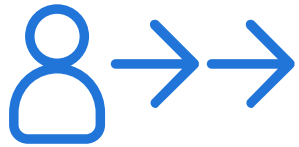


## most important attributes



● intenders

# channels to look for employers intenders.



**31%** (30%)\*

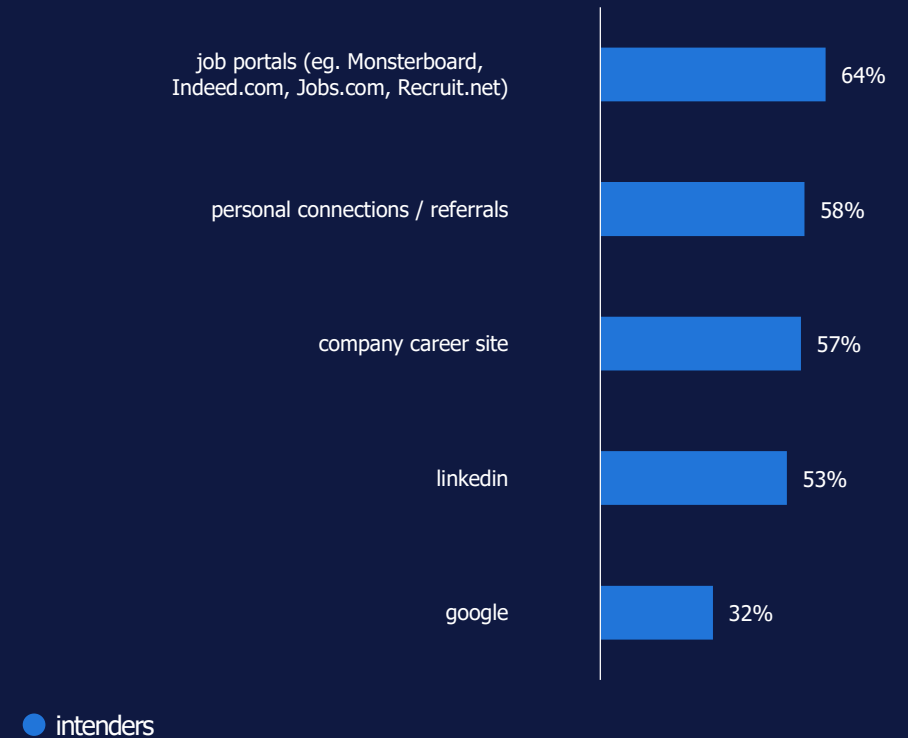
of last year's switchers\*\*  
intend to switch again  
next year.

\*\*n=2.659 switched last year

\*in 2018



## channels to look for employers

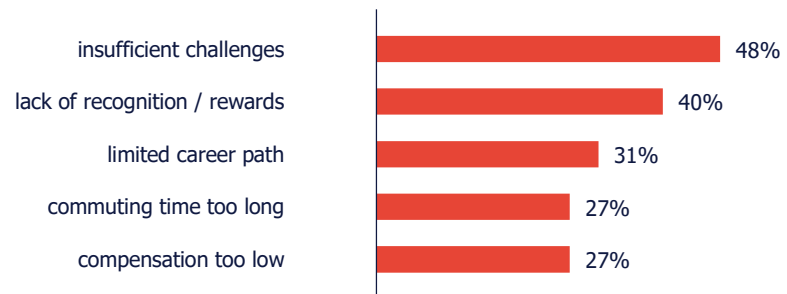


# why do the dutch stay or leave.

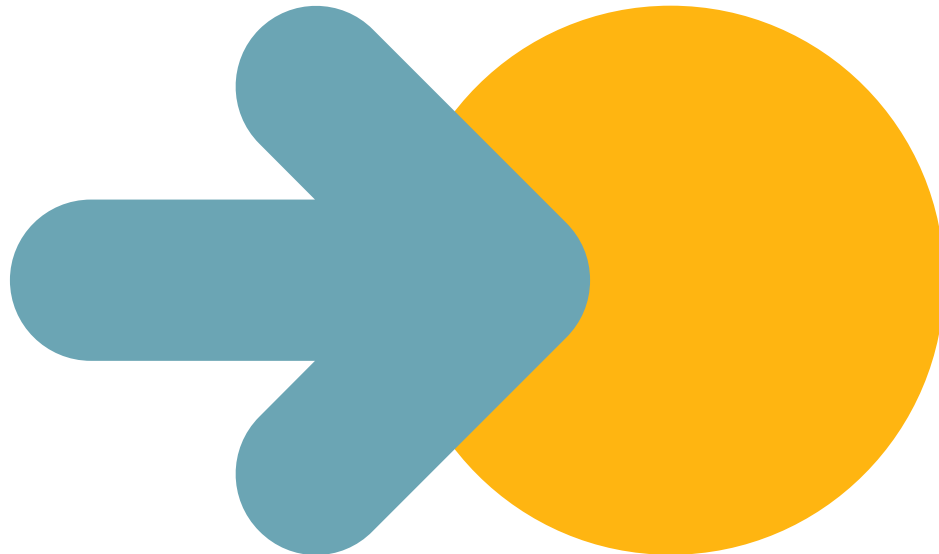
## main reasons to stay



## main reasons to leave



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



---

gen z (18-24)

62%

of the gen z's are staying with their employer for an attractive salary & benefits. This is higher when compared to older workforce.

---

gen x (35-54)

48%

of the gen x's stay with their employer for a good work-life balance. Among other generations, this factor is deemed less important.

---

millennials (25-34)

44%

of the millennials stay if they have career opportunities. Older generations are less interested in this offering from their employer.

---

boomers (55-64)

48%

of the boomers are more likely to stay with an employer that is conveniently located. This is less so among the other cohorts.

---

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



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

gen z (18-24)

56%

of the gen z's are leaving their employer if they don't get sufficient challenges at work. This is higher when compared to older workforce.

gen x (35-54)

27%

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

millennials (25-34)

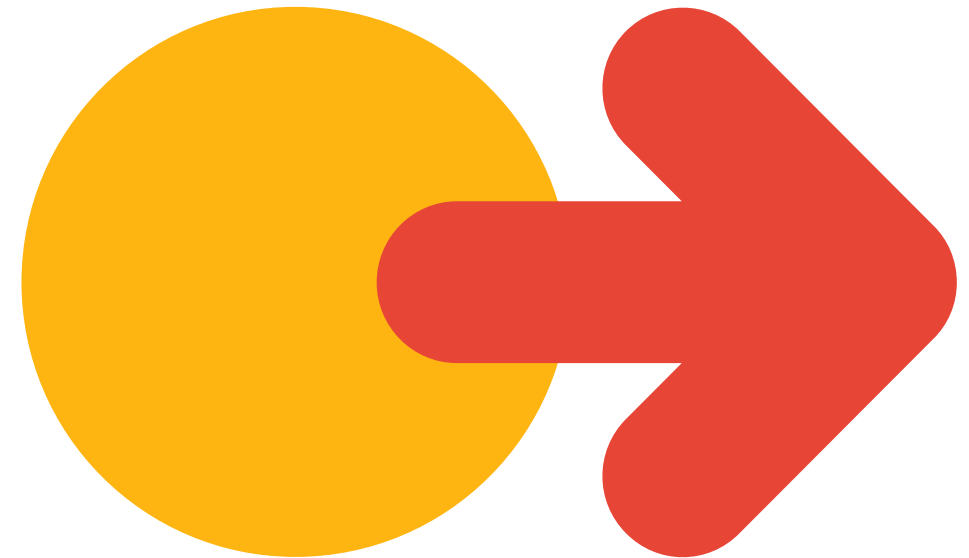
39%

of the millennials leave if they lack career growth opportunities. Older generations are less interested in this offering from their employer.

boomers (55-64)

34%

of the boomers are more likely to leave their employer if their commuting time is too long. This is less so among the other cohorts.

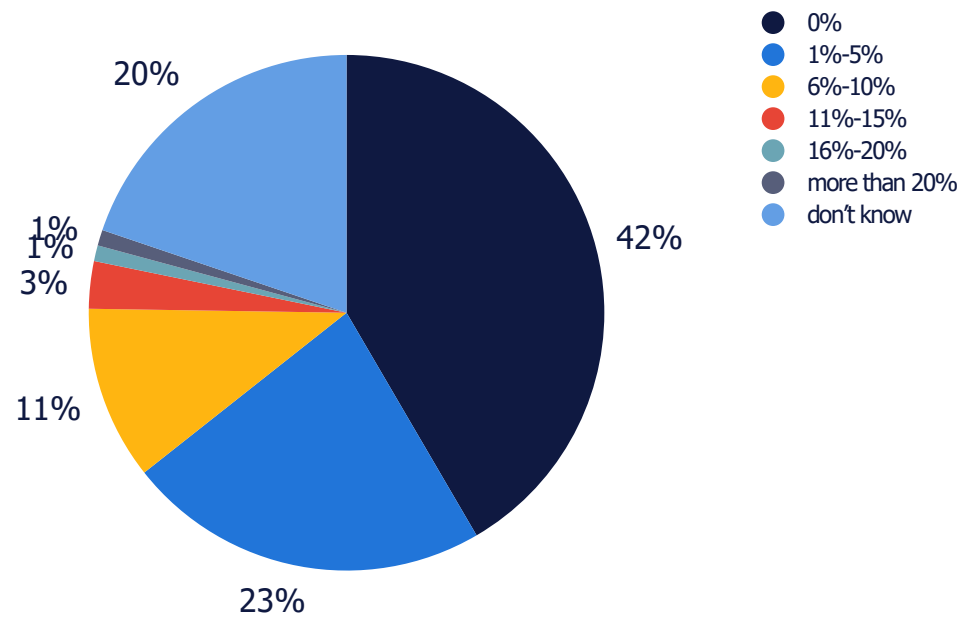


[click here](#) for a breakdown of all results.



# willingness to forfeit salary for more work security.

amount of salary employees are willing to forfeit



the netherlands

5%

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



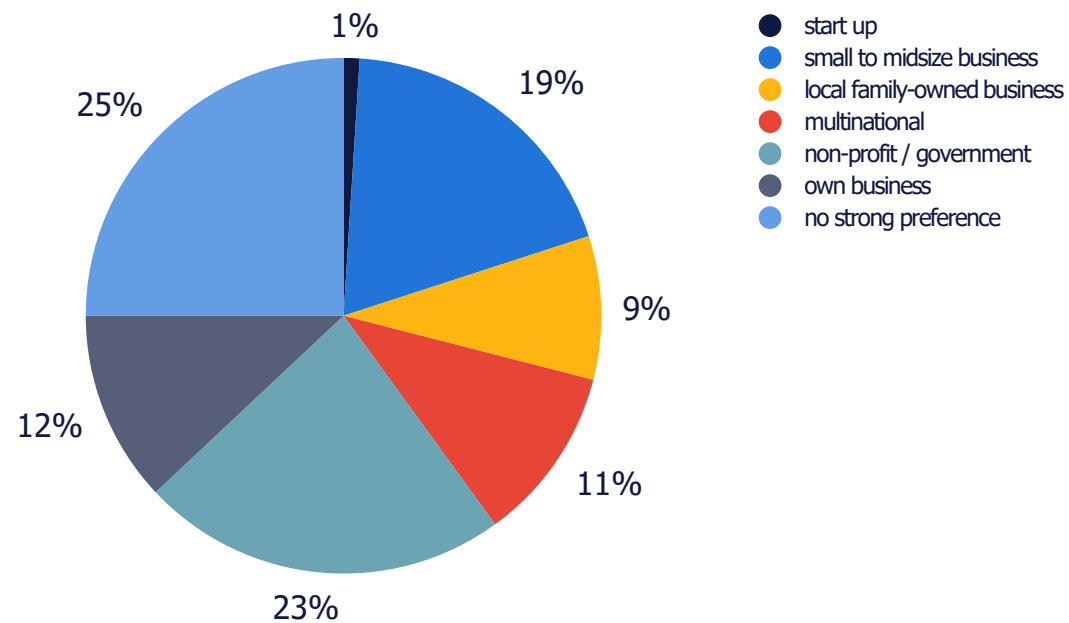
# ideal employer



## in focus.

# 23% of the dutch prefer to work for non-profit / government.

preferred company type



gen z (18-24)

30%

have no strong preference

gen x (35-54)

25%

would prefer to work for non-profit / government

millennials (25-34)

24%

would prefer to work for a small to mid-size business

boomers (55-64)

31%

have no strong preference

# company type preference reasons why.

---

start up (1%)

interesting job content

career progression

pleasant work atmosphere

---

multinational (11%)

career progression

financial health

attractive salary & benefits

---

---

small to midsize (19%)

pleasant work atmosphere

work-life balance

interesting job content

---

non-profit / government (23%)

interesting job content

work-life balance

job security

---

---

local family-owned (9%)

pleasant work atmosphere

work-life balance

interesting job content

---

own business (12%)

interesting job content

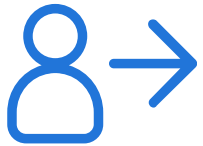
work-life balance

flexible arrangements

---



# company type preference switchers vs stayers.



23%

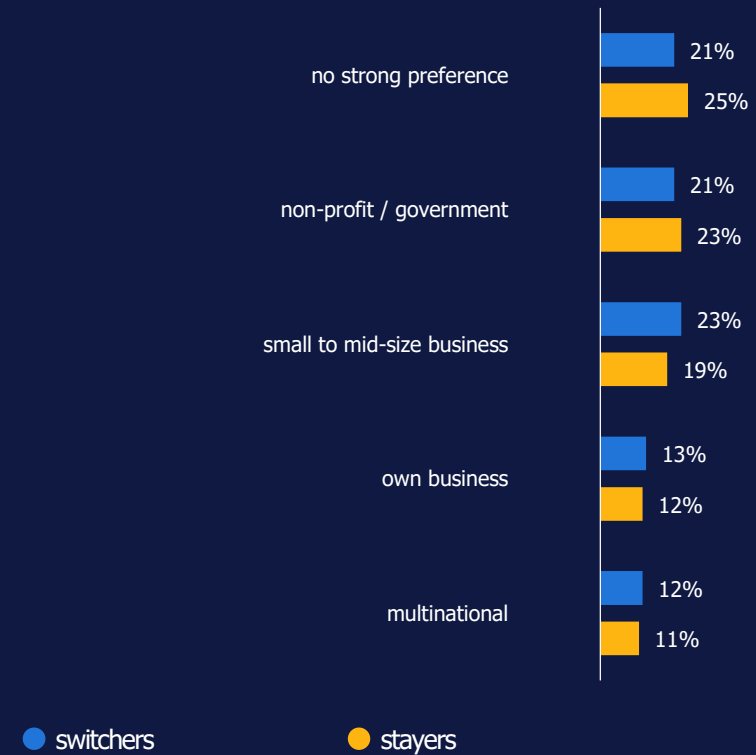
of the switchers prefer to work for a small to mid-size business.



25%

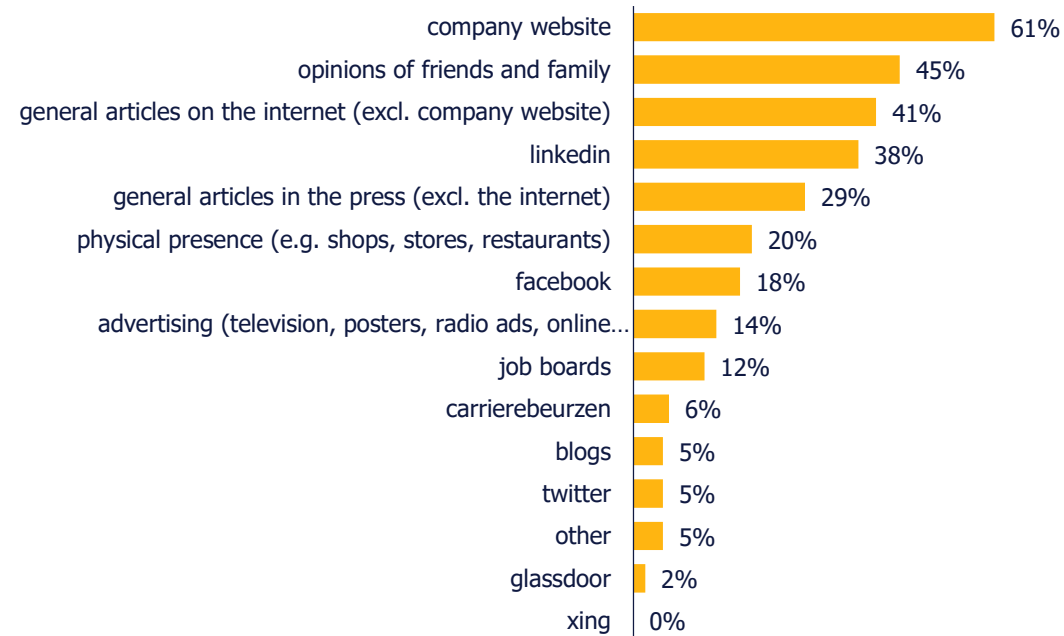
of the stayers have no strong preference.

## company type preference



# 80% of the dutch check potential employer's reputation.

## channels for reputation check



## most often used

gen z (18-24)

25%

physical presence

gen x (35-54)

62%

company website

millennials (25-34)

65%

company website

boomers (55-64)

28%

do not check potential employer's reputation

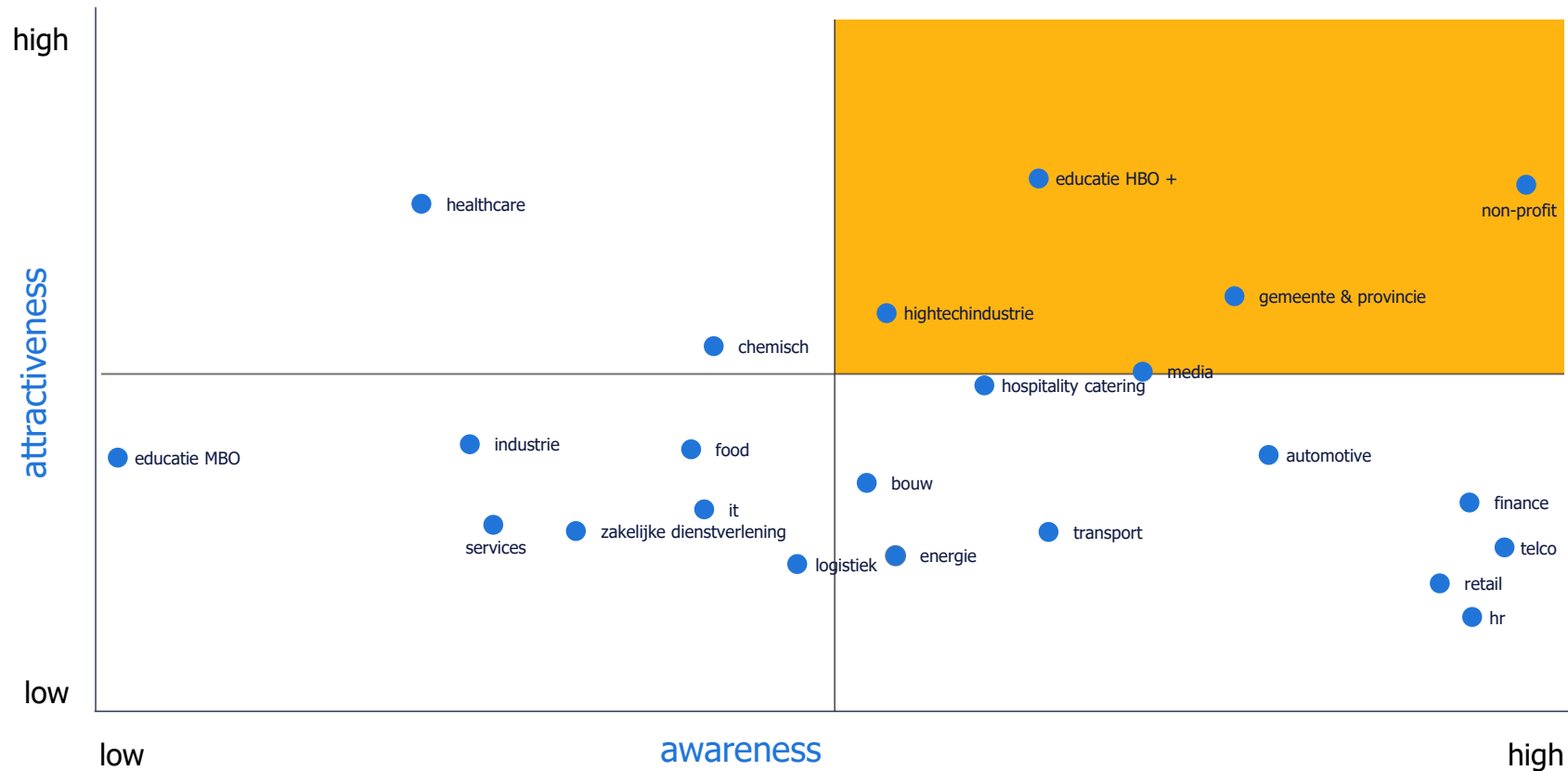
sector



insights.



# top performing sectors in the netherlands 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.



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

1/3

top 3 EVP drivers

sector	1	2	3
01 educatie HBO +	financially healthy	job security	very good reputation
02 non-profit	financially healthy	job security	career progression
03 healthcare	uses latest technologies	very good reputation	financially healthy
04 gemeente & provincie	job security	financially healthy	work-life balance
05 hightechindustrie	uses latest technologies	financially healthy	career progression
06 chemisch	financially healthy	uses latest technologies	career progression
07 media	financially healthy	uses latest technologies	very good reputation
08 hospitality catering	financially healthy	very good reputation	uses latest technologies
09 industrie	financially healthy	uses latest technologies	very good reputation



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

2/3

## top 3 EVP drivers

sector	1	2	3
10 food	financially healthy	very good reputation	uses latest technologies
11 automotive	uses latest technologies	financially healthy	very good reputation
12 educatie MBO	job security	financially healthy	work-life balance
13 bouw	financially healthy	uses latest technologies	career progression
14 finance	financially healthy	career progression	attractive salary & benefits
15 it	uses latest technologies	financially healthy	career progression
16 services	financially healthy	uses latest technologies	very good reputation
17 zakelijke dienstverlening	financially healthy	uses latest technologies	career progression
18 transport	financially healthy	uses latest technologies	job security



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

3/3

	top 3 EVP drivers		
sector	1	2	3
19 telco	financially healthy	uses latest technologies	career progression
20 energie	financially healthy	uses latest technologies	job security
21 logistiek	financially healthy	uses latest technologies	very good reputation
22 retail	financially healthy	very good reputation	uses latest technologies
23 hr	financially healthy	very good reputation	career progression



top



employers.

# top employers in the netherlands.

## top 10 employers 2019

---

- 01 KLM
- 02 NXP
- 03 Luchthaven Schiphol
- 04 MSD
- 05 Efteling
- 06 ASML
- 07 Shell
- 08 Cool Blue
- 09 Unilever
- 10 Sabic

## top 10 employers 2018

---

- 01 Luchthaven Schiphol
- 02 KLM
- 03 ANWB
- 04 Royal Haskoning DHV
- 05 ASML
- 06 NXP
- 07 Sanquin
- 08 Heineken
- 09 Sabic
- 10 APG Algemene Pensioen Groep

# the netherlands' top companies

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

top 5 companies	top 3 EVP drivers		
	1	2	3
1 KLM	uses latest technologies	very good reputation	financially healthy
2 NXP	uses latest technologies	financially healthy	very good reputation
3 Luchthaven Schiphol	uses latest technologies	financially healthy	career progression
4 MSD	financially healthy	uses latest technologies	career progression
5 Efteling	financially healthy	very good reputation	pleasant work atmosphere

# top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	ASML	PriceWaterhouseCoopers	KPMG
career progression	ASML	Shell	Sabiq
financially healthy	Heineken	Shell	ASML
gives back to society	RENEWI	Vitens	ANWB
interesting job content	ASML	MSD	GE
job security	ASML	Shell	Unilever
pleasant work atmosphere	Efteling	Cool Blue	ANWB
uses latest technologies	ASML	NXP	IBM
very good reputation	ASML	ANWB	Efteling
work-life balance	APG Algemene Pensioen Groep	ANWB	Vitens



deep dive

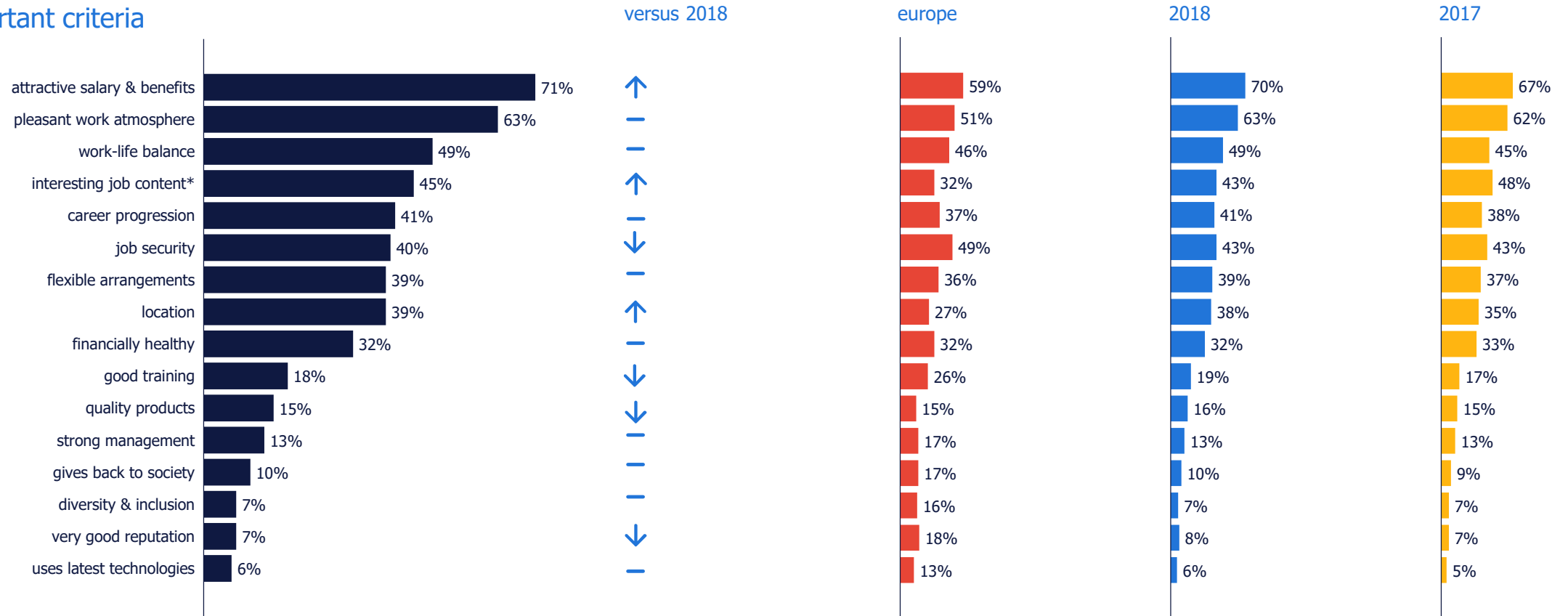
appendix 1.



# what potential employees want

## the most important criteria when choosing an employer.

### important criteria

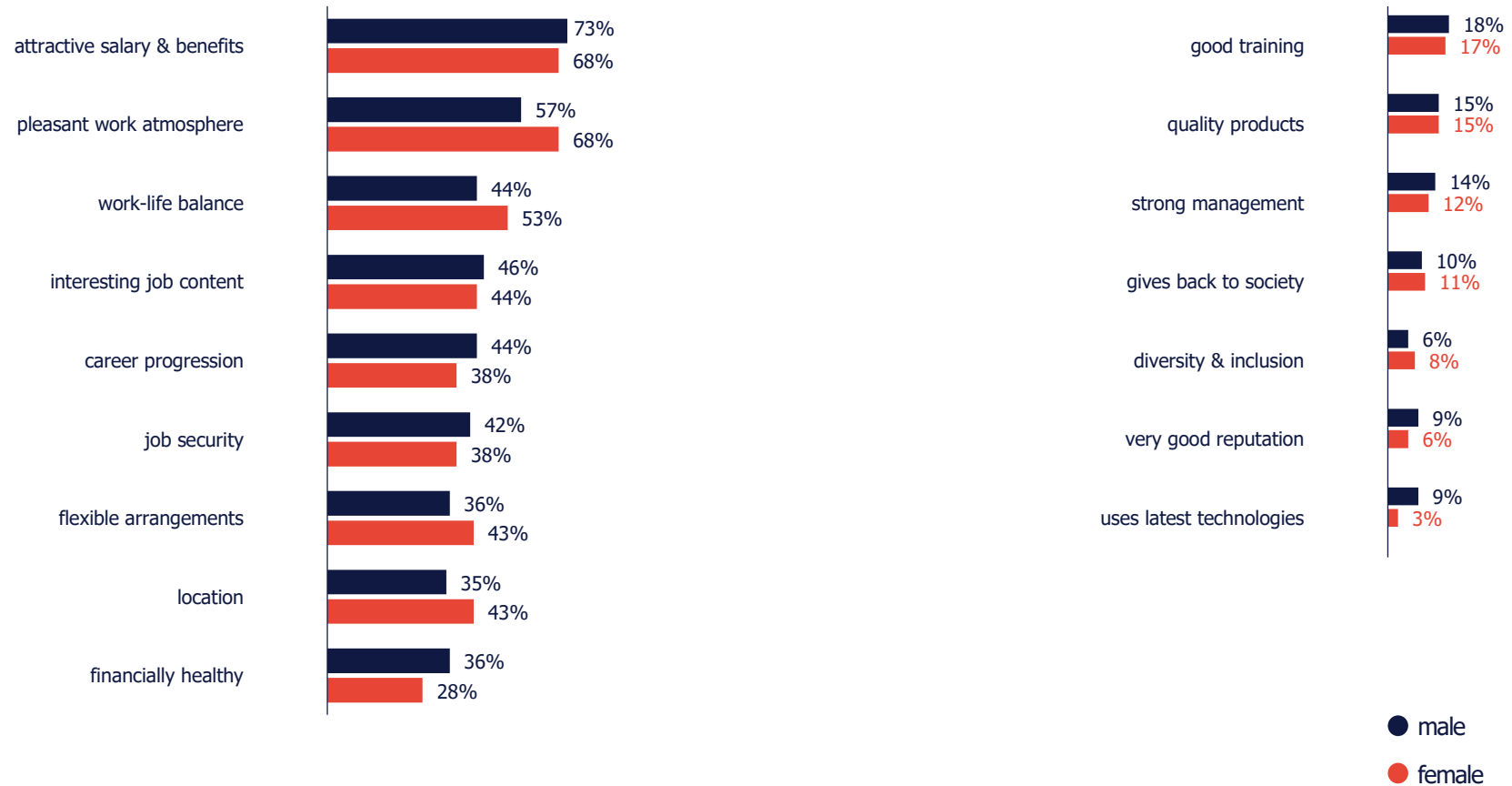


Characteristics highest rated by the labor force. Stressing these elements or improving them is critical for your EVP because they contribute most to the strength of your employer brand.

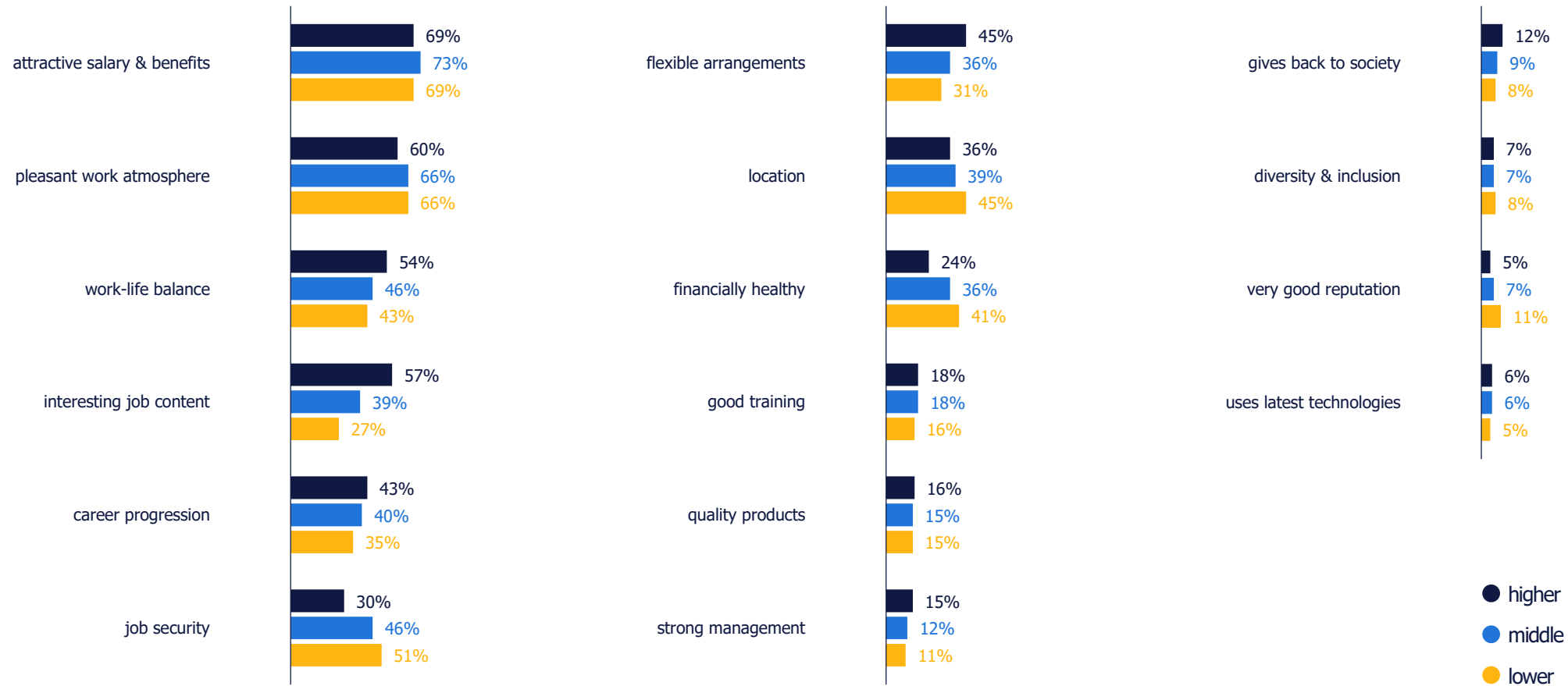
\*2017: work that is stimulating and challenging



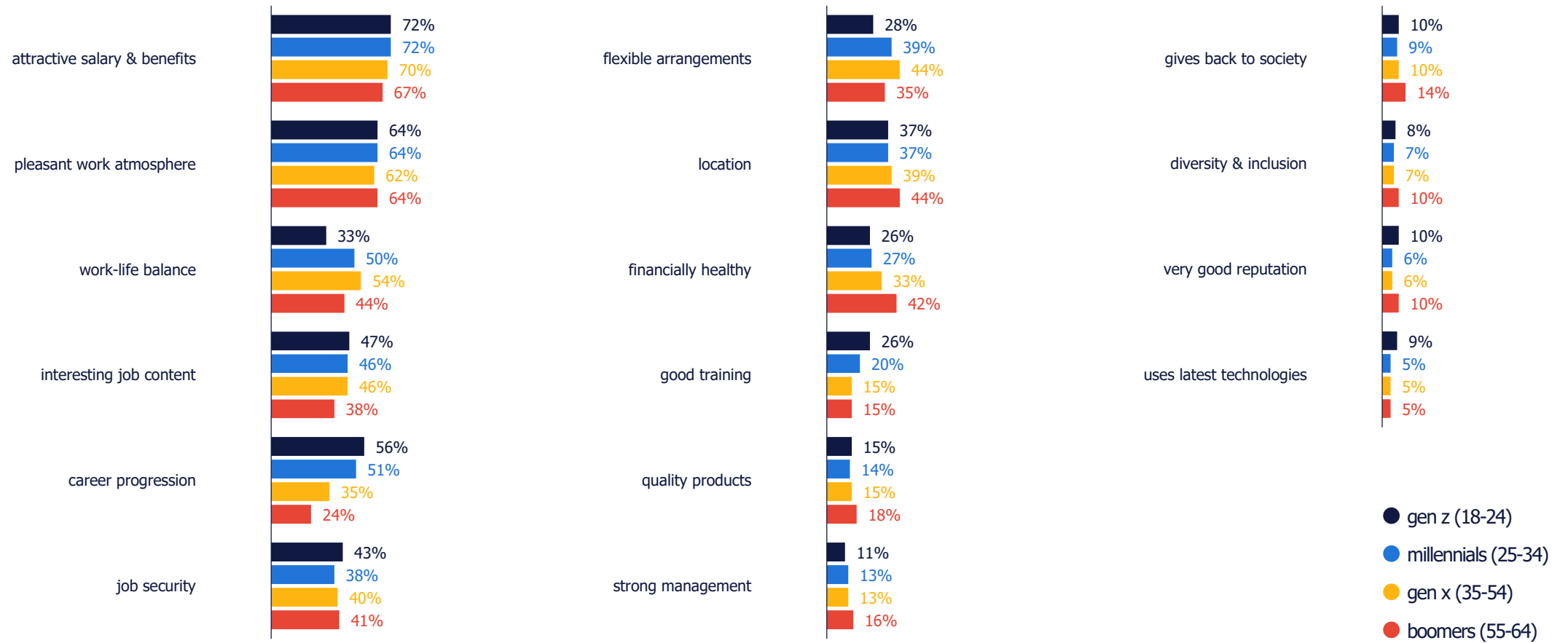
# EVP driver importance by gender.



# EVP driver importance by education.



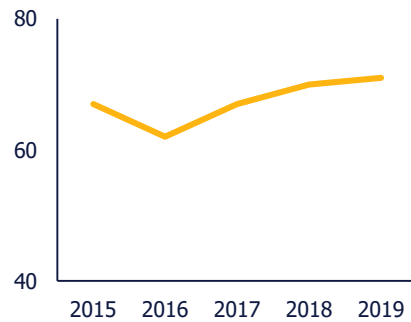
# EVP driver importance by age.



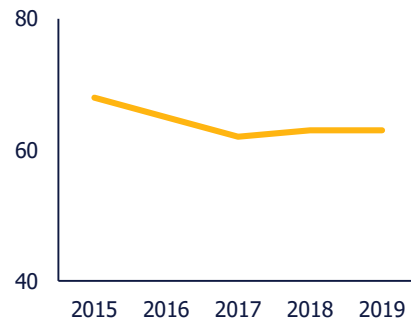
# EVP driver importance trends, total.

1/2

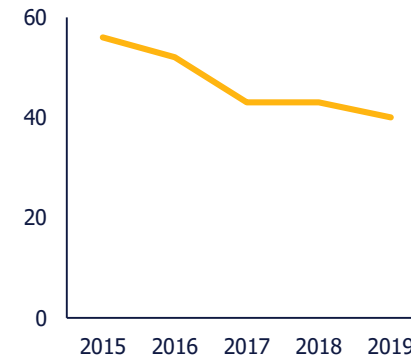
attractive salary & benefits



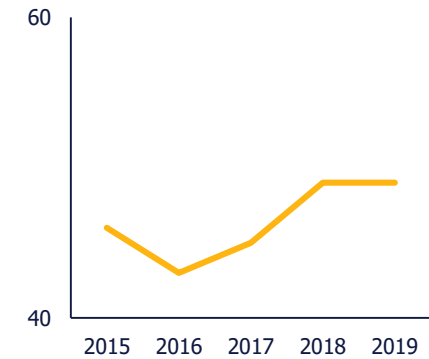
pleasant work atmosphere



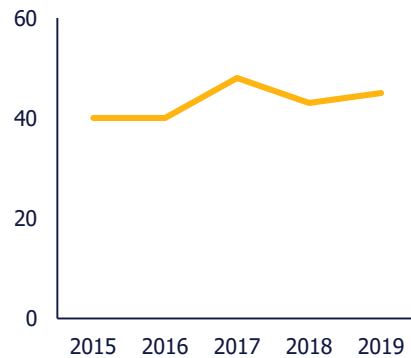
job security



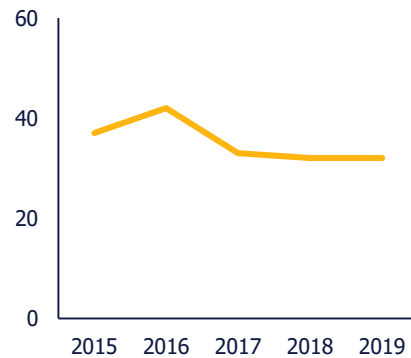
work-life balance



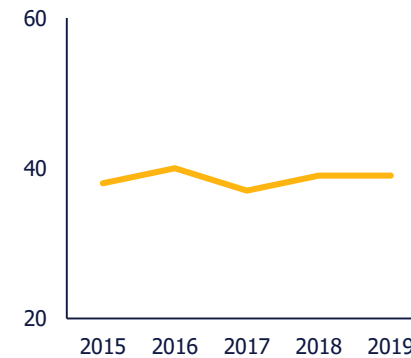
interesting job content\*



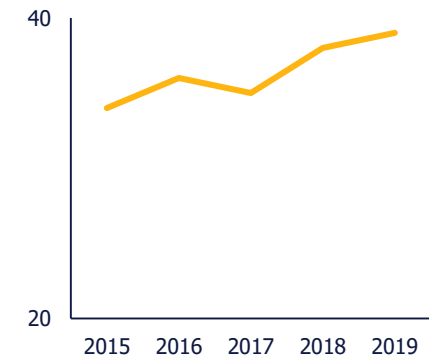
financially healthy



flexible arrangements



location



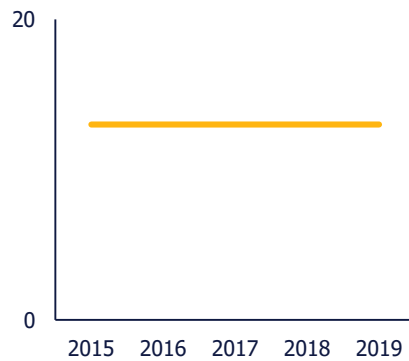
\*2017: work that is stimulating and challenging



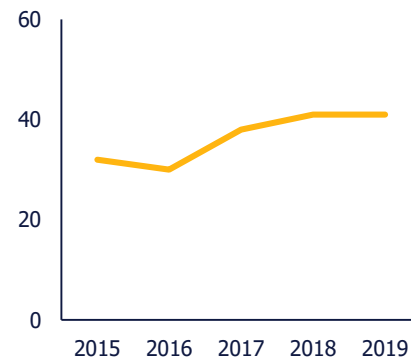
# EVP driver importance trends, total.

2/2

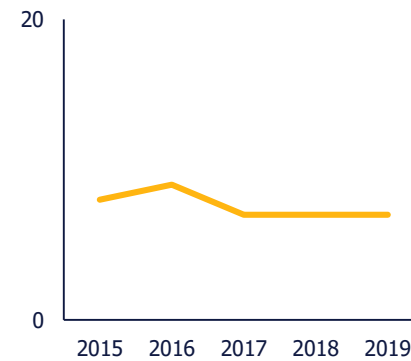
strong management



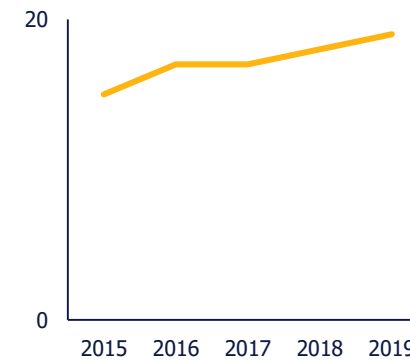
career progression



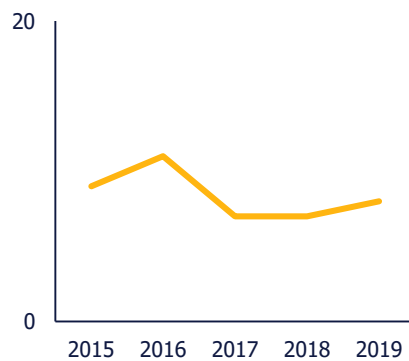
diversity & inclusion



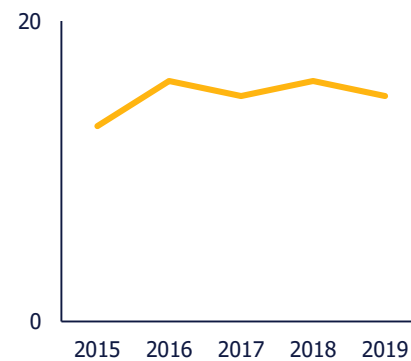
good training



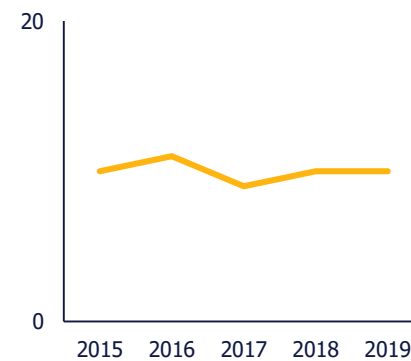
very good reputation\*



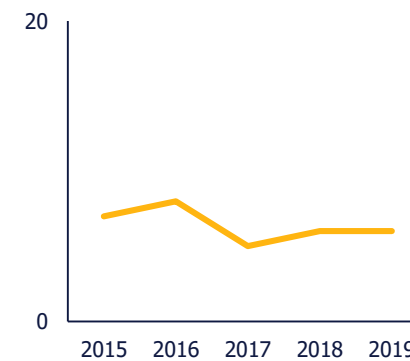
quality products



gives back to society



uses latest technologies

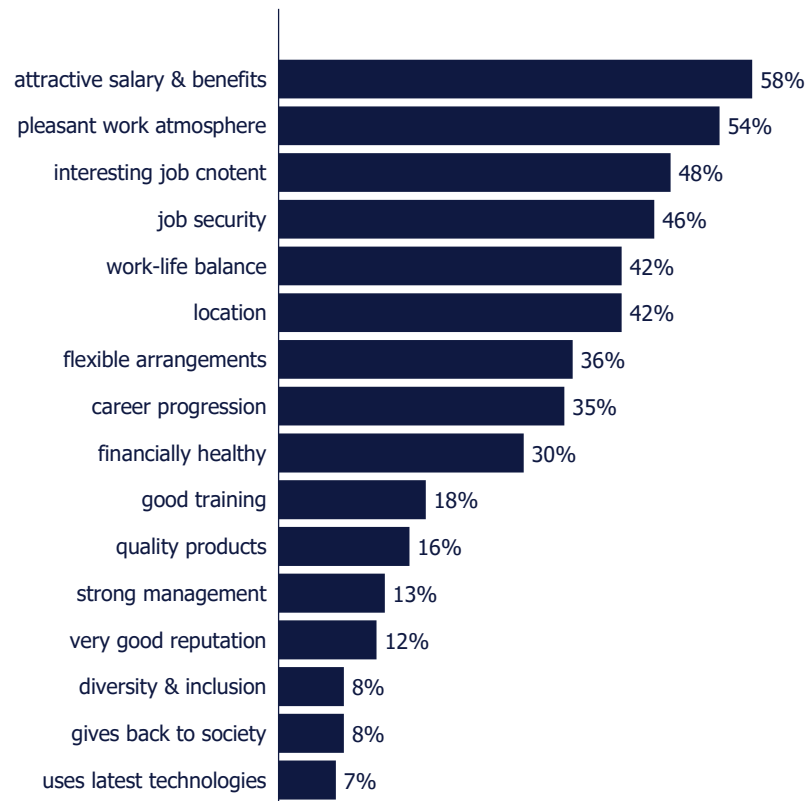


\*previous to 2017: strong image/strong values



# what factors do the dutch stay or leave for.

## reasons to stay



## reasons to leave





# methodology



## appendix 2.

# methodology

## why smart sampling?

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

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

### example

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

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

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

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

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



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# company specific slide.

## your company

- What does it do/ what is it known for
- Active in x countries: name countries

## few facts about their EVP (if any)

- Abc
- Abc

## how can the RS consultant help them

- Ipienit re laceatu riateni temquis coraectem volorro totasi ipsam dis sum quissinvenis enisti ut faccae.
- Obita qui qui as modisque pos est re, officataque dem ut atur sum nis assi nimo vollab ilit ratus, vid ut volo rem la idebis etur ressi deri dolo bearum remporenis.
- Alita ex ellupta tecusam que non repuda nimpe solum am dolecti re il ipsam fugiam volorum quam.



# let's talk.

Our research has many insightful, but complex insights so we'd love the opportunity to walk you through this document, share our thoughts and answer any questions you might have.



name organization  
name contact  
person



name organization  
name contact  
person



name organization  
name contact  
person



name organization  
name contact  
person

randstad

human forward.

