employer brand research 2020

romania.

content.

introduction.

why employer branding matters.

50% of candidates say they wouldn't work for a company with a bad reputation – even with a pay increase.[2]

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

80% of workforce leaders agree that a strong employer brand has a significant impact on their ability to hire great workforce.[4] As people work for cultures, not companies, their perception of you as an employer is of paramount importance. Both recruiters and candidates cite company culture as one of the most important determinants in employer choice. Also, if your culture is transparent: candidates actively research the culture of companies to understand if they'll fit. If candidates see positive employee and candidate experiences on review sites, they feel more confident submitting their resume and making a career move.

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

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

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

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

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

76% Employees who experience a strong alignment between what their employer says about itself and their experience working there are more likely to recommend their employer as a place to work.[9]

the employer brand roadmap.

audit current employer brand
• employer brand story
• external perception

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

assess competitors
for workforce

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

launch employer
brand internally
• gain employee
  and leadership
  feedback

develop the employer brand
strategy and creative assets

create the brand pillars and
employee value proposition

activate employer
brand externally

measure, assess
and refine

what is the randstad employer brand research?

- **a representative employer brand research** based on perceptions of the general audience. Optimizing over 20 years of successful employer branding insights.

- **an independent survey** with nearly 185,000 respondents in 33 markets worldwide.

- **a reflection of employer attractiveness** for the market's 75 largest employers known by at least 10% of the population.

- **provides valuable insights** to help employers shape their employer brand.

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

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

● markets surveyed

worldwide
• nearly 185,000 respondents
• 6,136 companies surveyed

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

country
• 4,564 respondents

fieldwork
• online interviews
• between 30 december 2019 and
  8 january 2020

length of interview
• 16 minutes

employer brand research set up.

30 companies per respondent

'do you know this company?':
determines awareness.

for each company known

'would you like to work for this company?':
determines attractiveness.

each company known

rating on a set of drivers:
determines reason for attractiveness.

smart sampling

Each respondent is shown 30 companies. Each company is evaluated only by respondents who are aware of that particular brand.

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

This method ensures that the lesser known companies are shown to more respondents in order to realize a sufficient robust sample. That way the Randstad Employer Brand Research assures dependable insights for both well known and lesser known employer brands.

drivers

each company is evaluated on:

01 financially healthy

02 uses latest technology

03 very good reputation

04 job security

05 career progression

06 gives back to society

07 interesting job content

08 pleasant work atmosphere

09 work-life balance

10 attractive salary & benefits

KANTAR
For this research, Randstad partners with Kantar, one of the world's largest insight, information and consultancy networks.
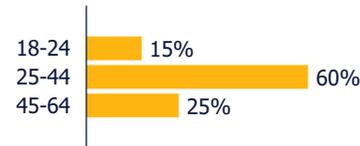
sample composition in romania
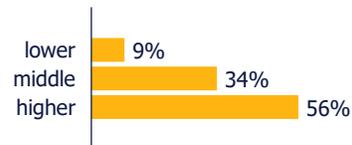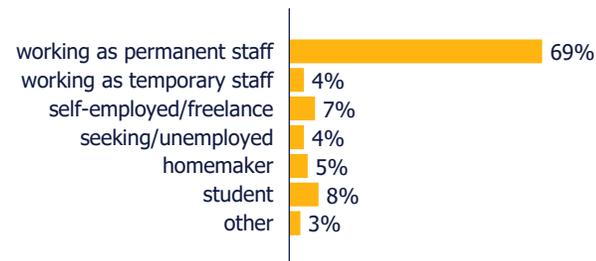## socio-demographics, employment status, region.

gender

female	50%
male	50%

age
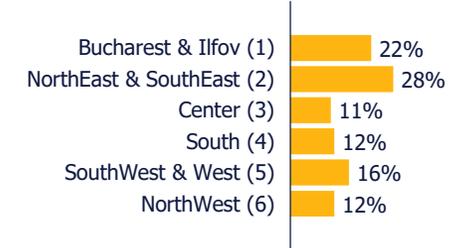
18-24	15%
25-44	60%
45-64	25%

education

lower	9%
middle	34%
higher	56%

employment status

working as permanent staff	69%
working as temporary staff	4%
self-employed/freelance	7%
seeking/unemployed	4%
homemaker	5%
student	8%
other	3%

generation

gen z (18-24)	15%
millennials (25-34)	34%
gen x (35-54)	45%
boomers (55-64)	6%

region

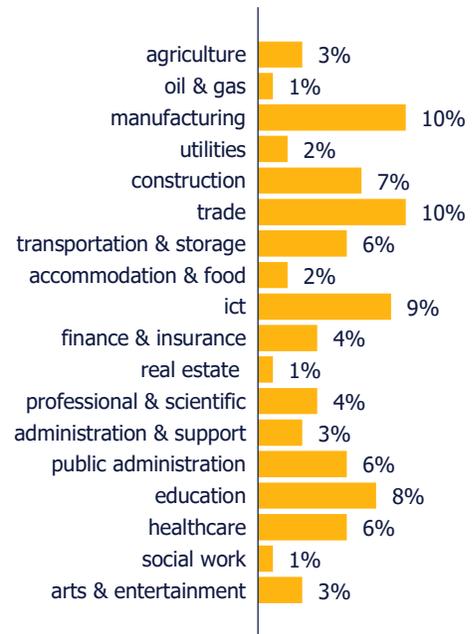|	
Bucharest & Ilfov (1)	22%
NorthEast & SouthEast (2)	28%
Center (3)	11%
South (4)	12%
SouthWest & West (5)	16%
NorthWest (6)	12%
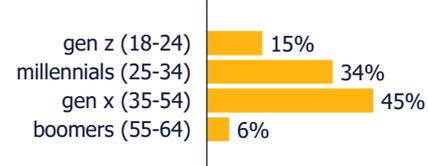
(1) București, Ilfov

(2) Bacău, Botoșani, Brăila, Buzău, Constanța, Galați, Iași, Neamț, Suceava, Tulcea, Vaslui, Vrancea

(3) Alba, Brașov, Covasna, Harghita, Mureș, Sibiu

(4) Argeș ,Călărași, Dâmbovița, Giurgiu, Ialomița, Prahova, Teleorman

(5) Arad, Caraș-Severin, Dolj, Gorj, Hunedoara, Mehedinți, Olt, Timiș, Vâlcea

(6) Bihor, Bistrița-Năsăud, Cluj, Maramureș, Sălaj, Satu Mare

total sample: 4,564
fieldwork: between 30 december 2019 and 8 january 2020

sample composition
in romania.

sector

agriculture	3%
oil & gas	1%
manufacturing	10%
utilities	2%
construction	7%
trade	10%
transportation & storage	6%
accommodation & food	2%
ict	9%
finance & insurance	4%
real estate	1%
professional & scientific	4%
administration & support	3%
public administration	6%
education	8%
healthcare	6%
social work	1%
arts & entertainment	3%

function

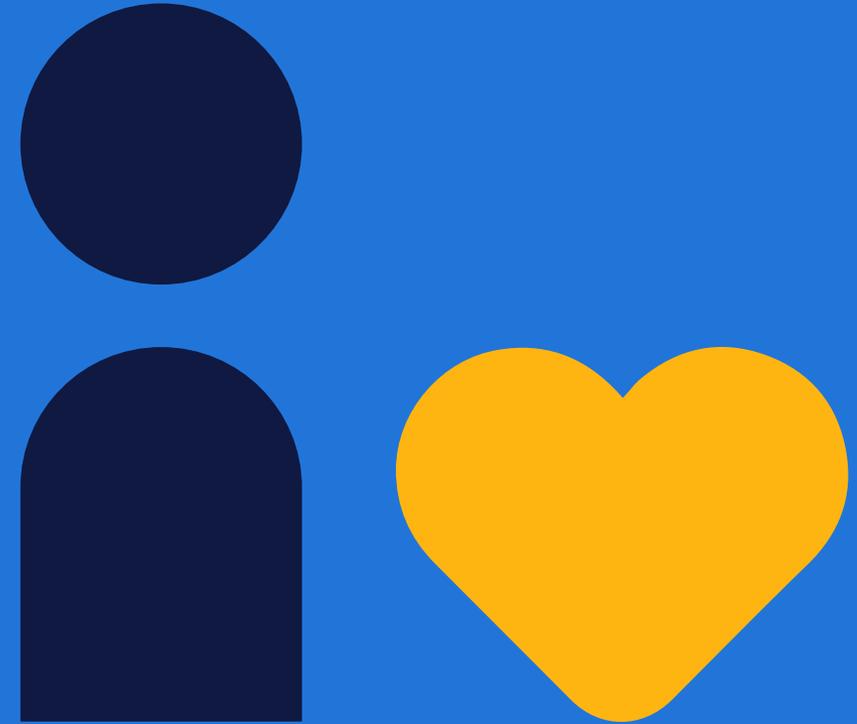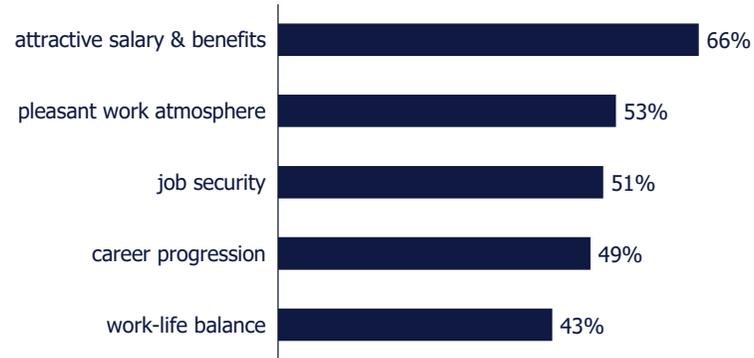|	
managers	15%
professionals	28%
technicians	10%
clerks	19%
service / sales	14%
skilled agricultural	1%
craft / trade	2%
machine operators	4%
elementary occupations	3%
armed forces occupations	3%

base: currently employed (n=3,642)

romania

EVP drivers.

what potential employees want
when choosing an employer.
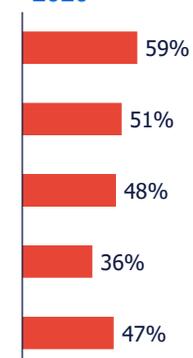
most important criteria
romania 2020
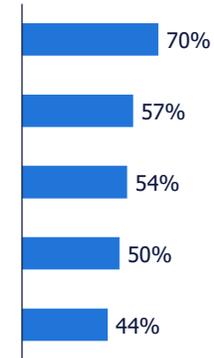
criteria	romania 2020
attractive salary & benefits	66%
pleasant work atmosphere	53%
job security	51%
career progression	49%
work-life balance	43%

romania 2019	europe 2020
70%	59%
57%	51%
54%	48%
50%	36%
44%	47%

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

perception of employer offer in romania.

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

evaluation of current employer.

1 job security

2 very good reputation

3 financially healthy

4 pleasant work atmosphere

5 interesting job content

6 work-life balance

7 career progression

8 attractive salary & benefits

9 uses latest technologies

10 gives back to society

general perception of employers in romania.

1 financially healthy

2 uses latest technologies

3 very good reputation

4 job security

5 career progression

6 attractive salary & benefits

7 pleasant work atmosphere

8 interesting job content

9 work-life balance

10 gives back to society

profile of ideal employer.

1 attractive salary & benefits

2 pleasant work atmosphere

3 job security

4 career progression

5 work-life balance

6 financially healthy

7 very good reputation

8 uses latest technologies

9 interesting job content

10 gives back to society

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

Employers in a market may not always be perceived to be offering what (potential) employees are looking for. Below you see the 3 main attributes employees look for but which they believe employers do not sufficiently offer.

gap top 3

attractive salary & benefits

pleasant work atmosphere

job security

what do potential employees want
by generational profile.

gen z (18-24)

41%

of the gen z's are looking for flexible arrangements in their employer. This is higher when compared to millennials (35%), gen x (33%) and boomers (28%).

gen x (35-54)

69%

of the gen x's find attractive salary & benefits a very important pull factor towards an employer. Among gen z, this factor is deemed less important (52%).

millennials (25-34)

53%

of the millennials seek career opportunities. Other generations are less interested in this offering from their employer (gen z – 46%, gen x – 47% and boomers – 38%).
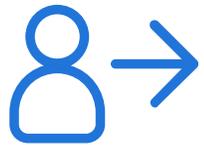
boomers (55-64)

36%

of the boomers are attracted to financially healthy companies and deem this aspect as a very important attribute. This is less so among gen z (22%) and millennials (25%).

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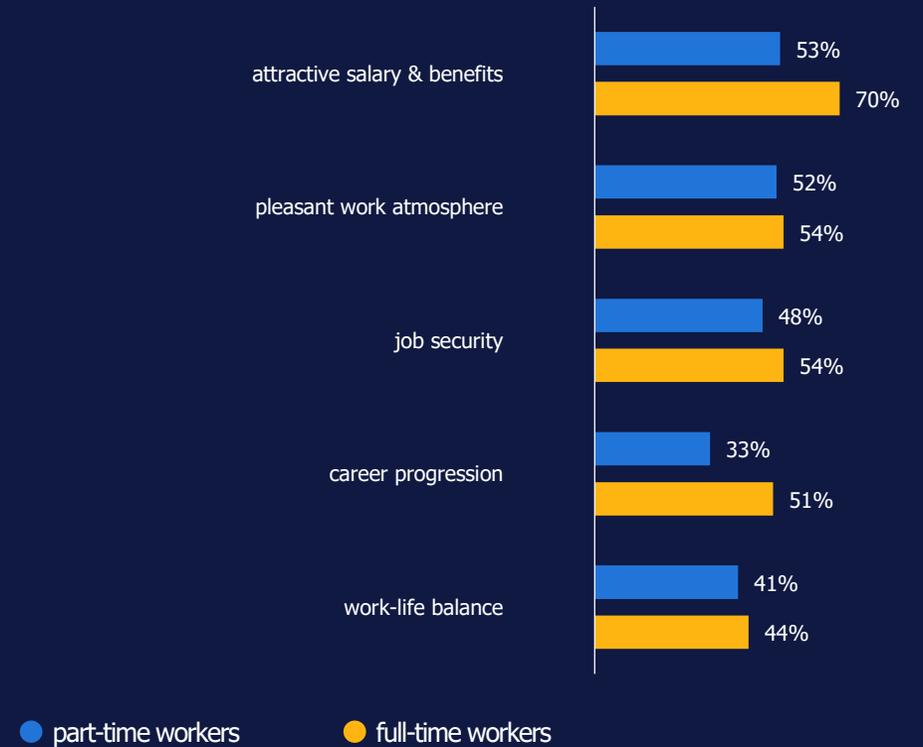
important attributes
by type of contract.

5%

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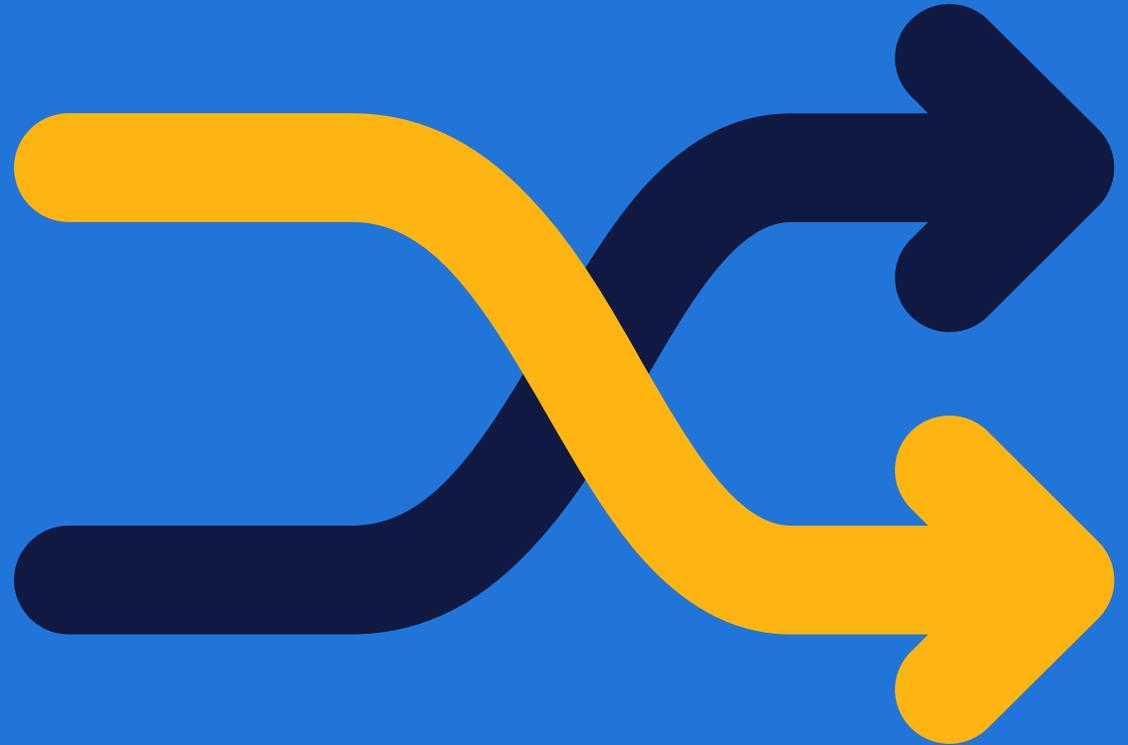works part-time.
(less than 30 hours per week)

most important attributes

attractive salary & benefits — 53% (part-time), 70% (full-time)

pleasant work atmosphere — 52% (part-time), 54% (full-time)

job security — 48% (part-time), 54% (full-time)

career progression — 33% (part-time), 51% (full-time)

work-life balance — 41% (part-time), 44% (full-time)

● part-time workers   ● full-time workers

switchers and stayers

in focus.

changing employer
romania vs europe.

switchers: changed employer in the past year.

romania	18%
europe	17%

stayers: stayed with their employer in the past year.

romania	82%
europe	83%

intenders: plan to change employer within the next year.

romania	31%
europe	25%
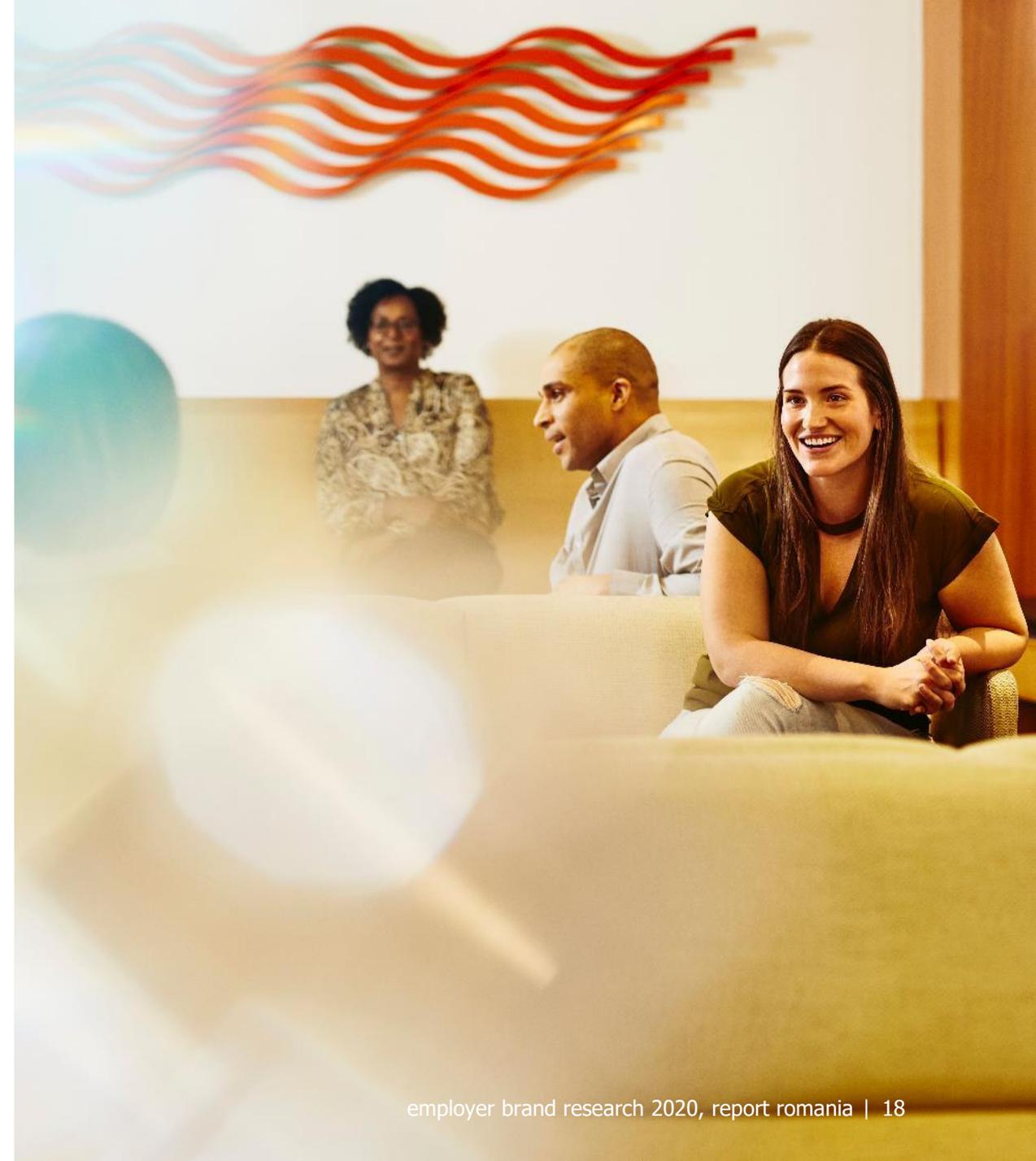
most important attributes
switchers vs stayers.

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switchers

2019

21%

→

2020

18%

changed employer in the past year.

---

stayers

2019

79%

→

2020

83%

stayed with their employer in the past year.

---

most important attributes

attribute	switchers	stayers
attractive salary & benefits	64%	66%
pleasant work atmosphere	51%	54%
job security	49%	52%
career progression	49%	49%
work-life balance	41%	43%
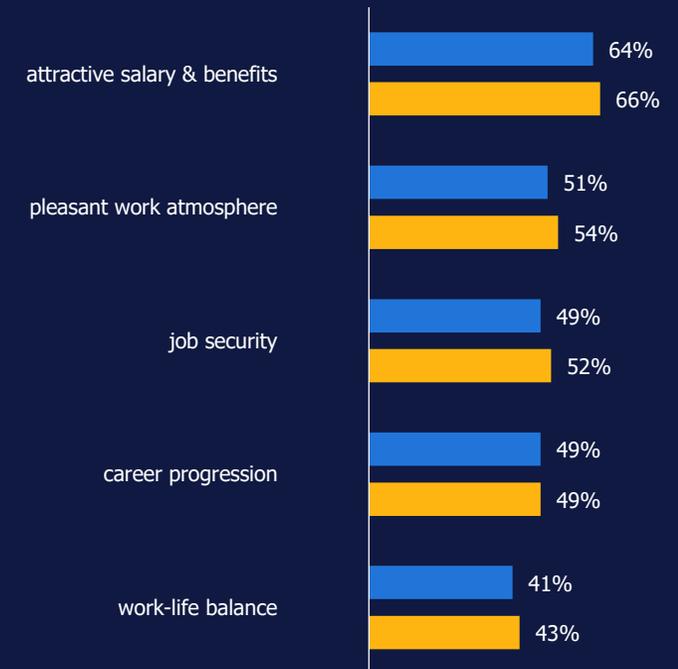
● switchers   ● stayers

most important attributes
intenders.

intenders

2019
36%

→

2020
31%
plan to change employer within the next year.

most important attributes among intenders

attractive salary & benefits — 70% (2020), 70% (2019)

pleasant work atmosphere — 55% (2020), 57% (2019)

job security — 49% (2020), 50% (2019)

career progression — 49% (2020), 53% (2019)

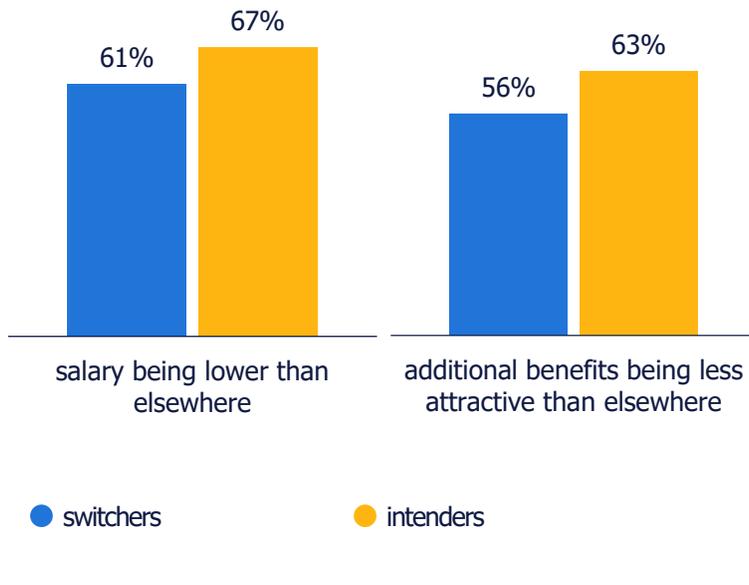work-life balance — 44% (2020), 43% (2019)
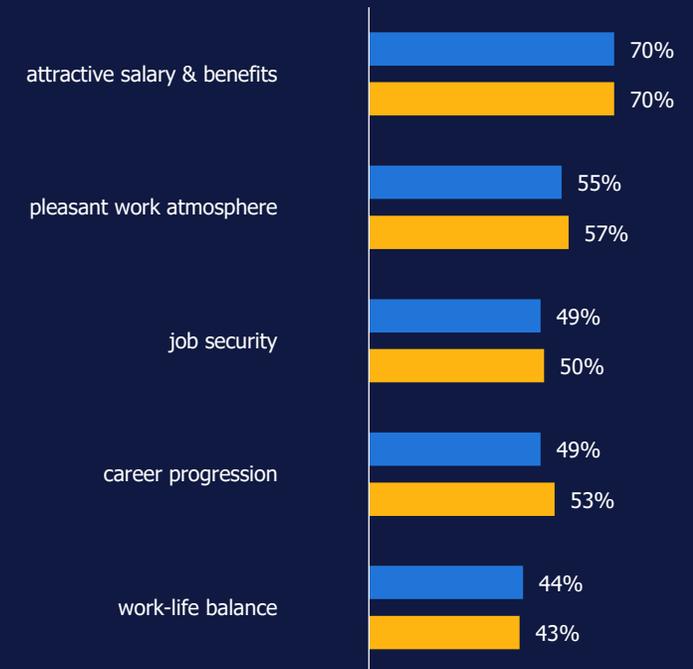
● 2020   ● 2019

switchers vs intenders
financial reasons.

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

switchers ● | **intenders** ●

salary being lower than elsewhere — switchers 61%, intenders 67%

additional benefits being less attractive than elsewhere — switchers 56%, intenders 63%

romania

65%

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

60%

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

europe

52%

is leaving or planning to do so because of a lower salary compared to elsewhere.
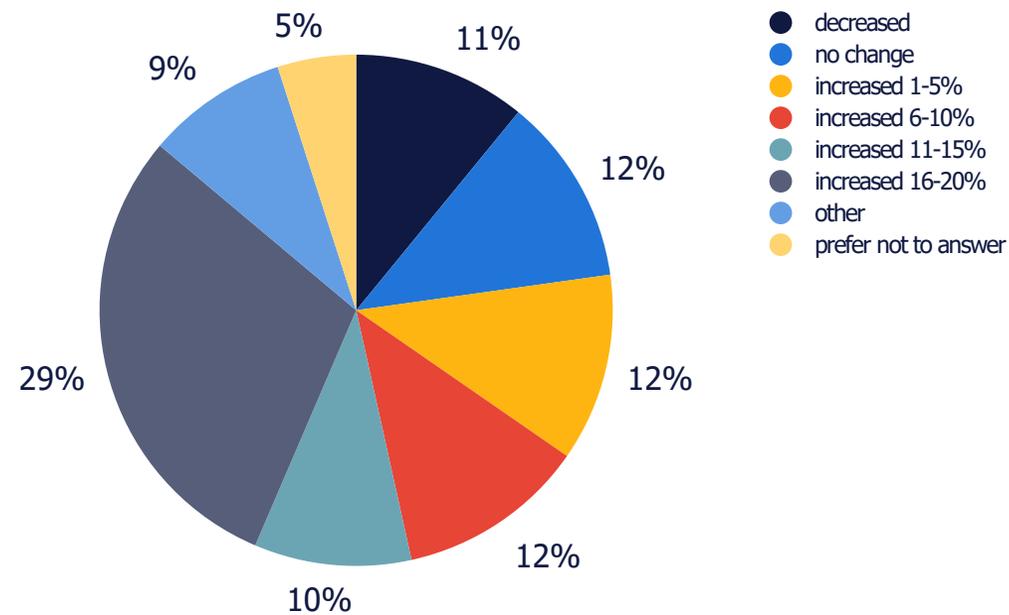
45%

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

switching for higher salary
nearly 1 in 4 switchers gets a 1 to 10% pay increase.

salary change after switch

- decreased
- no change
- increased 1-5%
- increased 6-10%
- increased 11-15%
- increased 16-20%
- other
- prefer not to answer

11%
12%
12%
12%
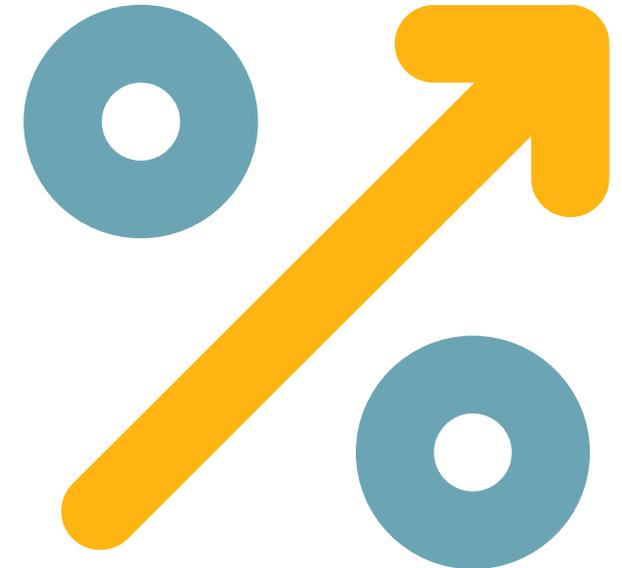10%
29%
9%
5%

romania

24%

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

europe

39%

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

switchers vs intenders
emotional reasons.

romania

75%

find non-monetary benefits important.

europe

62%

find non-monetary benefits important.

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

	poor relationship with manager / colleagues	mismatch between personal and organizational values	lack of sense of purpose
switchers	42%	48%	39%
intenders	40%	48%	43%

● switchers   ● intenders
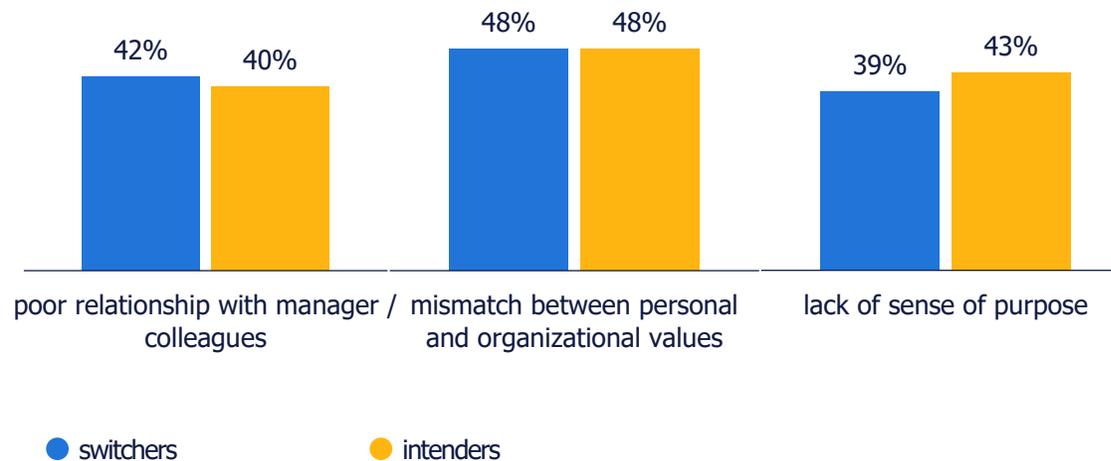
reasons to leave
by profile.

salary being lower than elsewhere

68%

of the **gen x** are likely to leave an employer if they receive a higher salary elsewhere. This is higher when compared to gen z (59%) and millennials (63%).

additional benefits being less attractive

64%

of the **gen x** are likely to leave their employer if additional benefits offered by other employers are more attractive. This is higher when compared to gen z (51%).

poor relationship with manager

41%

of the **gen x** agree that a poor relationship with their manger is a serious reason to consider working elsewhere.
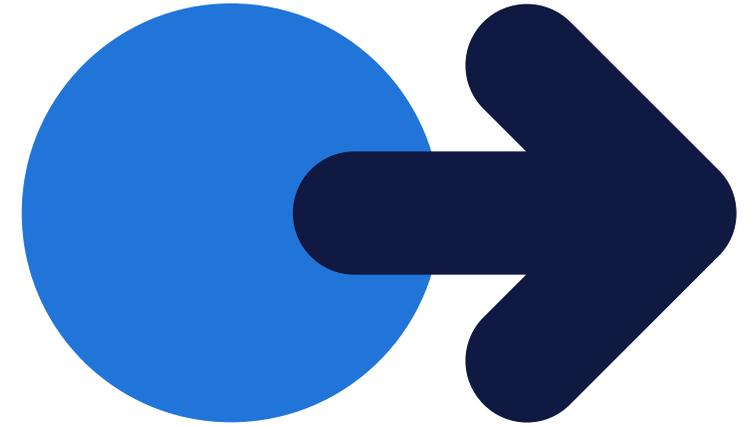
mismatch between personal and organizational values

49%

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

lack of sense of purpose

44%

of the **gen x** may leave or have left their employer if they lack a sense of purpose in their job. This is higher when compared to gen z (36%).
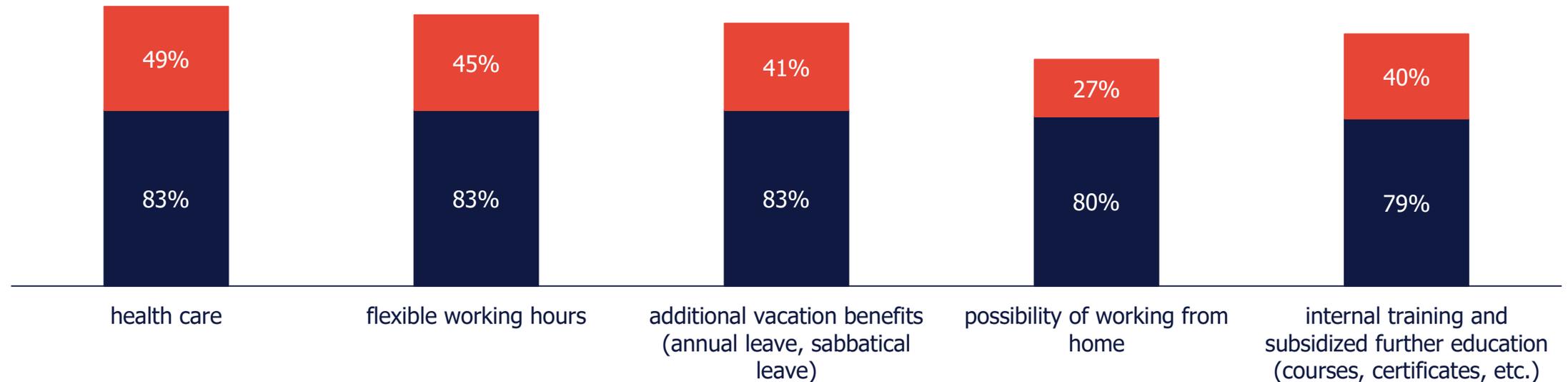
additional benefits

in focus.

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

top 5 most attractive benefits & received

49%	45%	41%	27%	40%
83%	83%	83%	80%	79%
health care	flexible working hours	additional vacation benefits (annual leave, sabbatical leave)	possibility of working from home	internal training and subsidized further education (courses, certificates, etc.)

● attractive ● attractive & received

click here for full results.

most attractive benefits
by profile.

gen z (18-24)

81%

of the gen z's find flexible working hours and additional vacation benefits attractive as employment benefits.

gen x (35-54)

70%

of the gen x's find childcare services and support attractive as an employment benefit. This is higher when compared to gen z (57%) and boomers (56%).
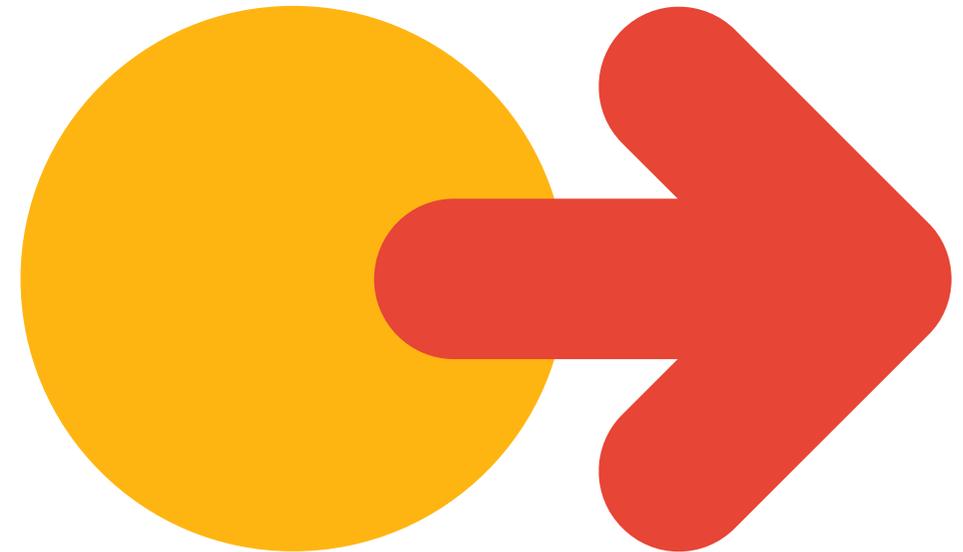
millennials (25-34)

81%

of the millennials find the possibility of working from home attractive as an employment benefit. This is higher when compared to gen z (73%).

boomers (55-64)

91%

of the boomers find health care attractive as an employment benefit. This is higher when compared to gen x and millennials (80%, respectively).
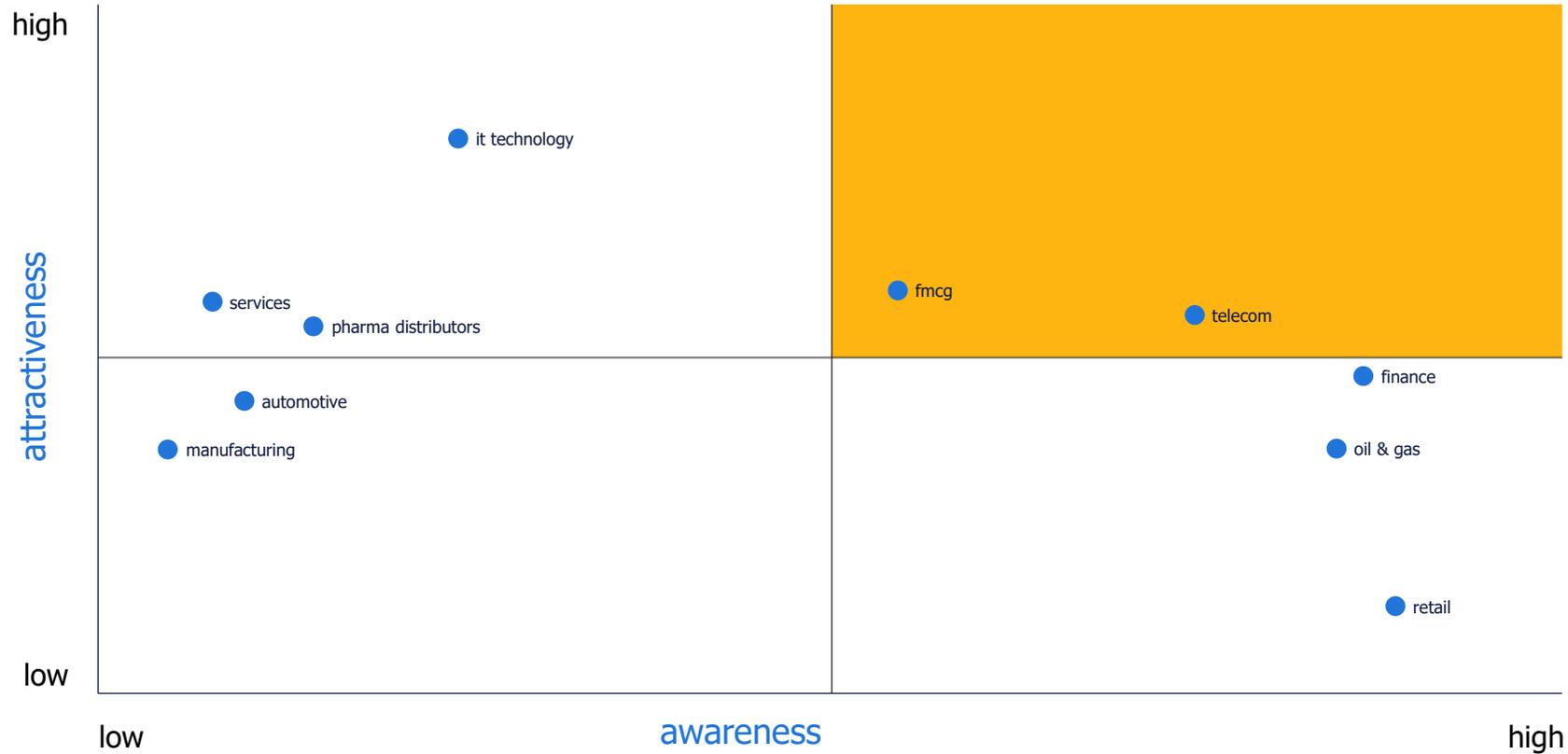
sector

insights.

top performing sectors in romania
by awareness and attractiveness.

high

attractiveness

- it technology
- services
- pharma distributors
- fmcg
- telecom
- finance
- automotive
- oil & gas
- manufacturing
- retail

low

low   awareness   high

high awareness
Having a high awareness means that employers in the sector are widely known.

high attractiveness
A sector with high attractiveness contains more highly attractive companies than other sectors.

romania's best performing companies by sector.

top 3 companies

sector	1	2	3
01 it technology	Ibm Romania Srl	Ubisoft Srl	Oracle Romania Srl
02 fmcg	Coca Cola Romania Srl	Heineken Romania Sa	Ursus Breweries Sa
03 services	HP	Amazon Development Center (Romania) S.R.L	Accenture
04 telecom	Orange Romania Sa	Vodafone Romania Sa	Rcs & Rds SA
05 finance	Ing Bank N.V., Amsterdam	Banca Transilvania	Raiffeisen Bank
06 automotive	Ford Romania Sa	Robert Bosch Srl	Michelin Romania Sa
07 oil & gas	Omv Petrom SA	Rompetrol Rafinare Sa	Lukoil Romania Srl
08 manufacturing	Eaton Electro Productie Srl	Delonghi Romania	Valeo Lightining Injection
09 retail	Kaufland Romania	Carrefour Romania SA	Mega Image srl

top
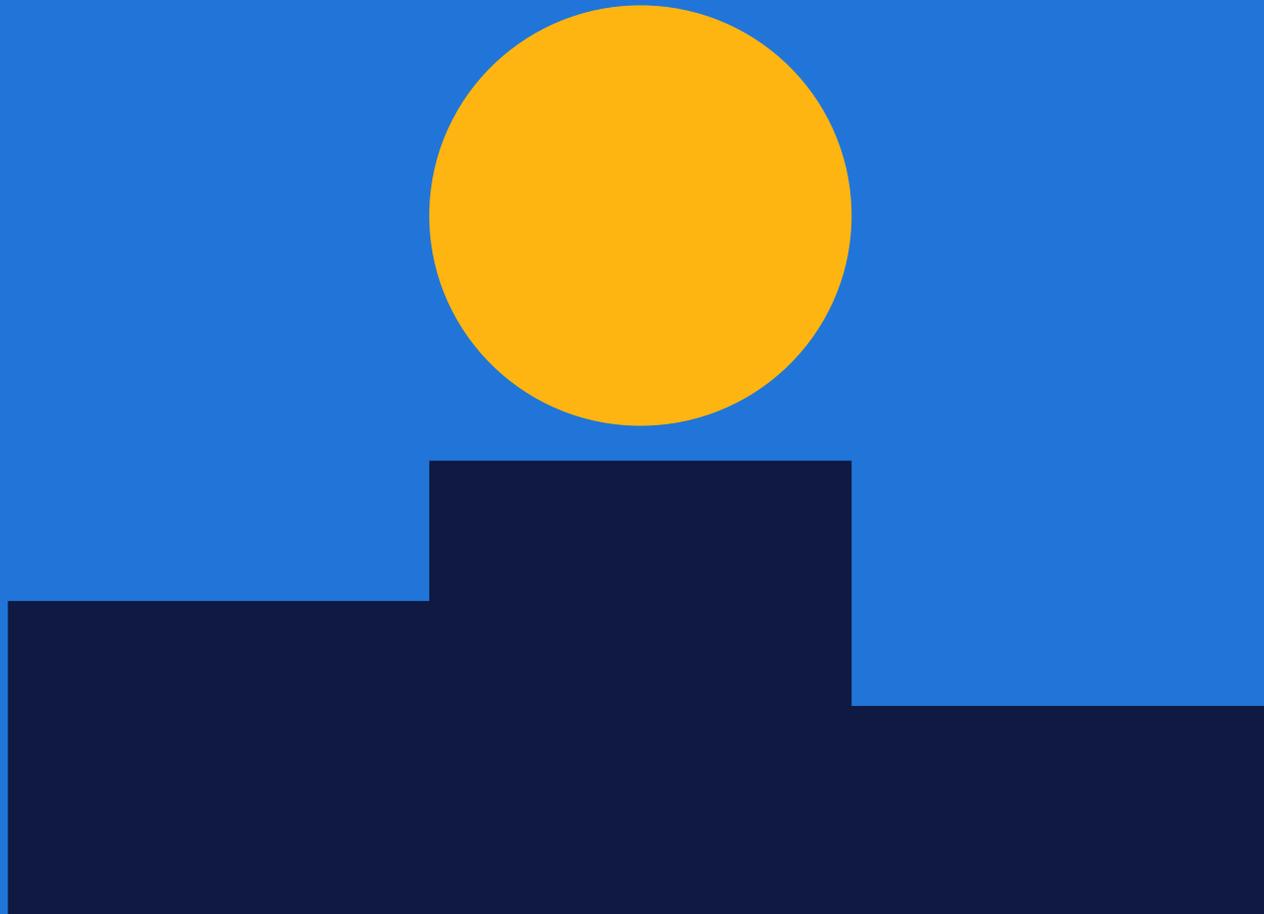
employers.

top employers to work for in romania.

top 10 employers 2020

01	Ibm Romania Srl
02	HP
03	Ubisoft Srl
04	Oracle Romania Srl
05	Amazon Development Center (Romania) S.R.L
06	Huawei Technologies Srl
07	Ford Romania Sa
08	Softvision Srl
09	Robert Bosch Srl
10	Renault Technologie

top 10 employers 2019

01	Huawei
02	IBM
03	Ford
04	Ubisoft Srl
05	Oracle
06	Atos IT
07	Gameloft
08	Continental
09	CGS
10	Bosch

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

top 5 companies	1	2	3
1 Ibm Romania Srl	uses latest technologies	financially healthy	very good reputation
2 HP	uses latest technologies	financially healthy	very good reputation
3 Ubisoft Srl	uses latest technologies	very good reputation	financially healthy
4 Oracle Romania Srl	uses latest technologies	financially healthy	very good reputation
5 Amazon Development Center (Romania) S.R.L	financially healthy	uses latest technologies	attractive salary & benefits

romania's top employers
by EVP driver.

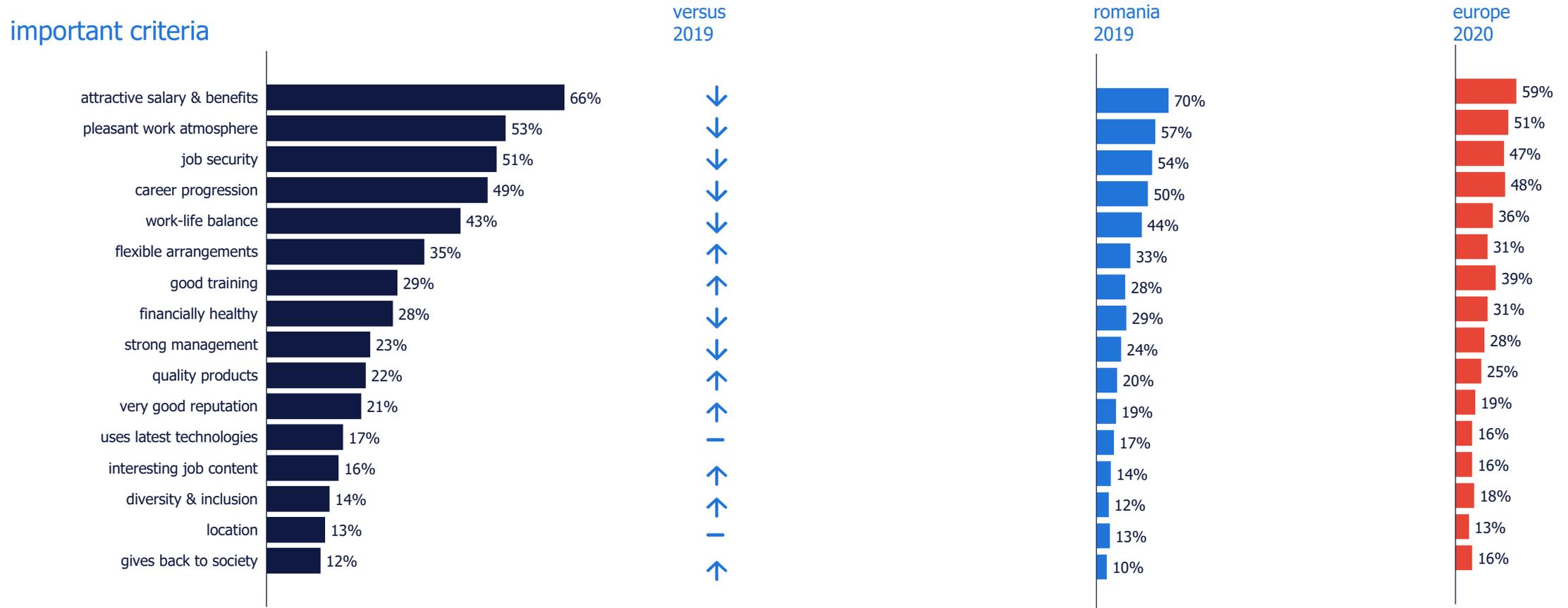| EVP driver	1	2	3
attractive salary & benefits	Ibm Romania Srl	Ubisoft Srl	Amazon Development Center (Romania) S.R.L
career progression	HP	Ibm Romania Srl	Huawei Technologies Srl
financially healthy	Amazon Development Center (Romania) S.R.L	Huawei Technologies Srl	HP
gives back to society	Oracle Romania Srl	Ibm Romania Srl	Robert Bosch Srl
interesting job content	Ibm Romania Srl	Ubisoft Srl	Oracle Romania Srl
job security	Oracle Romania Srl	Ibm Romania Srl	Huawei Technologies Srl
pleasant work atmosphere	Ubisoft Srl	Ibm Romania Srl	Amazon Development Center (Romania) S.R.L
uses latest technologies	Huawei Technologies Srl	Ibm Romania Srl	HP
very good reputation	Ibm Romania Srl	Michelin Romania Sa	Ubisoft Srl
work-life balance	Softvision Srl	Ibm Romania Srl	Luxoft Professional Romania Srl

deep dive
EVP drivers

2020 employer brand research.
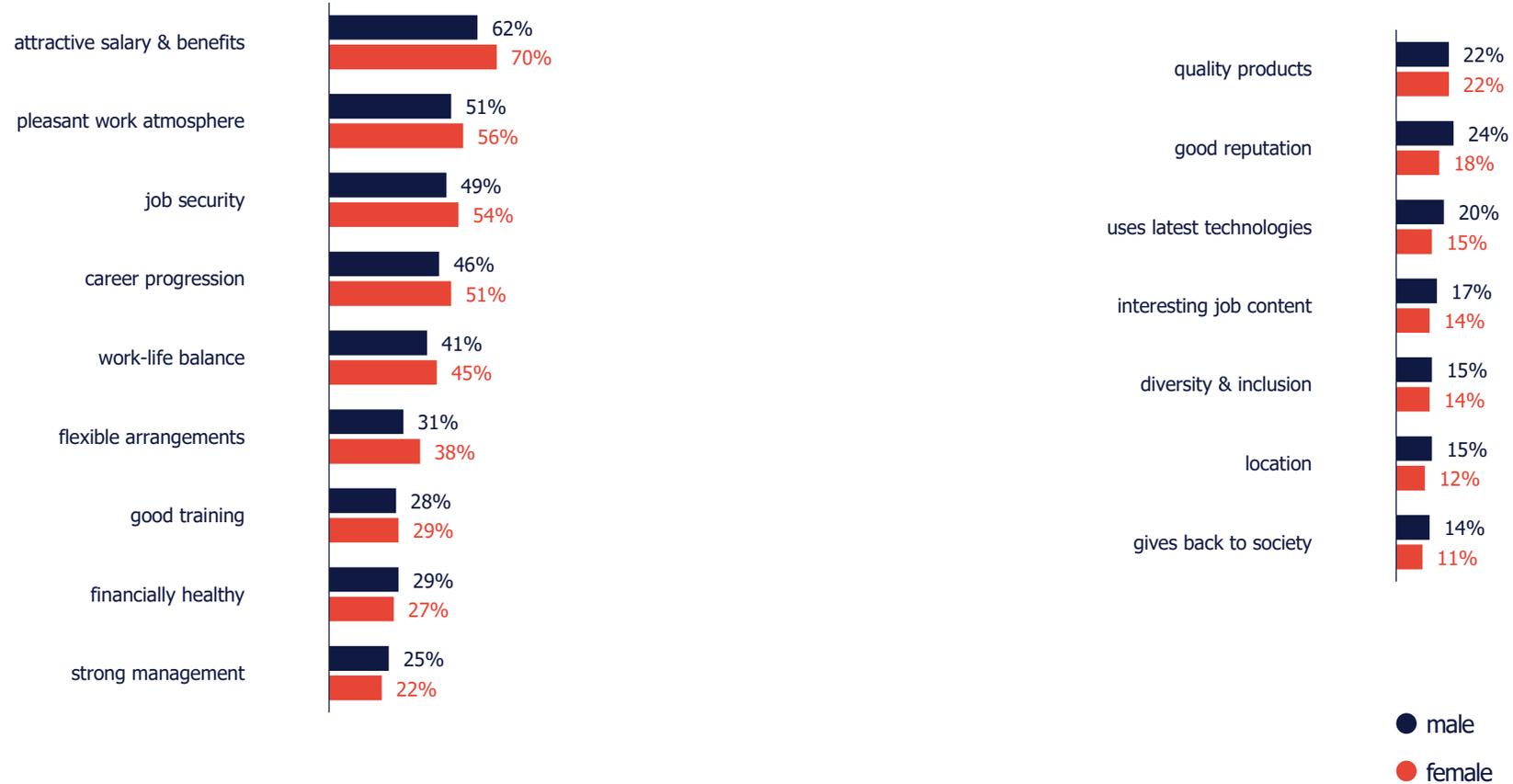
what potential employees want
the most important criteria when choosing an employer.

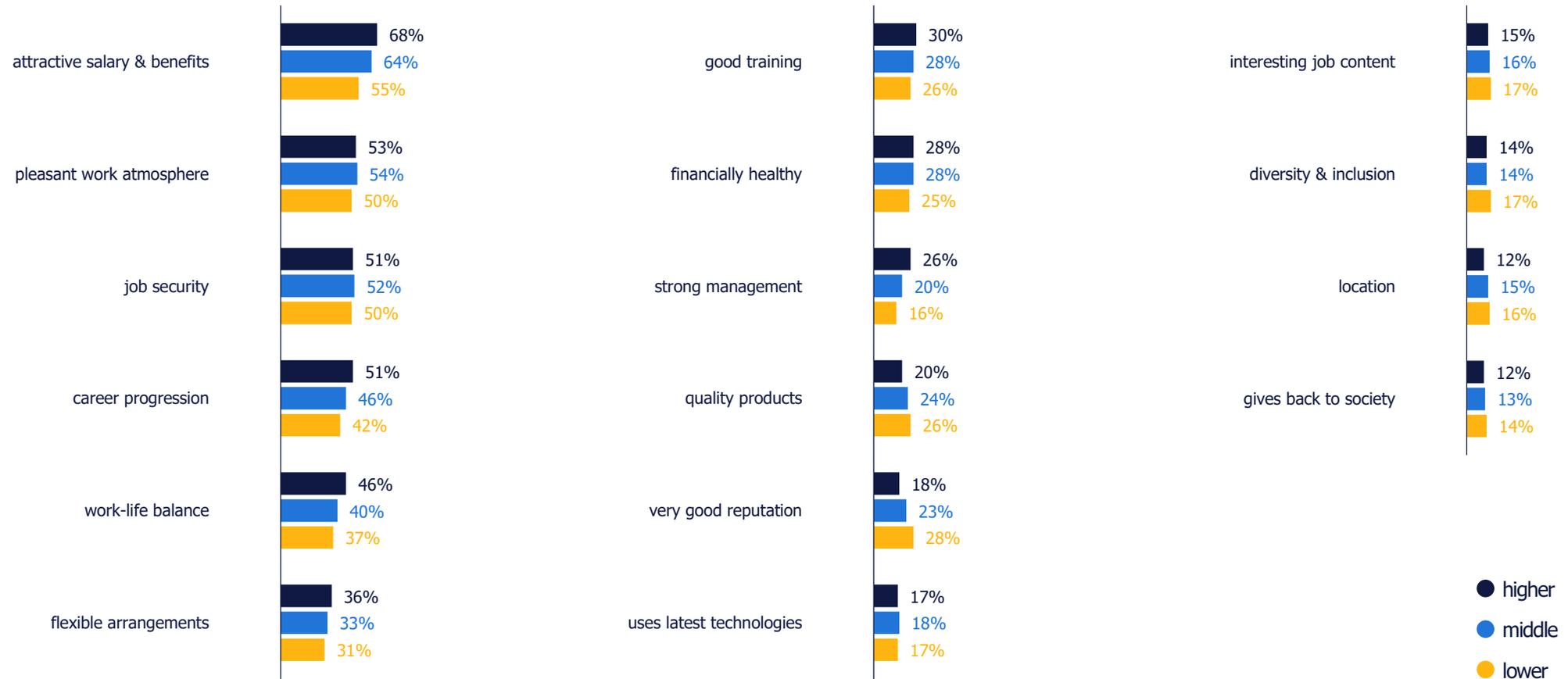| important criteria		versus 2019	romania 2019	europe 2020
attractive salary & benefits	66%	↓	70%	59%
pleasant work atmosphere	53%	↓	57%	51%
job security	51%	↓	54%	47%
career progression	49%	↓	50%	48%
work-life balance	43%	↓	44%	36%
flexible arrangements	35%	↑	33%	31%
good training	29%	↑	28%	39%
financially healthy	28%	↓	29%	31%
strong management	23%	↓	24%	28%
quality products	22%	↑	20%	25%
very good reputation	21%	↑	19%	19%
uses latest technologies	17%	—	17%	16%
interesting job content	16%	↑	14%	16%
diversity & inclusion	14%	↑	12%	18%
location	13%	—	13%	13%
gives back to society	12%	↑	10%	16%

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.
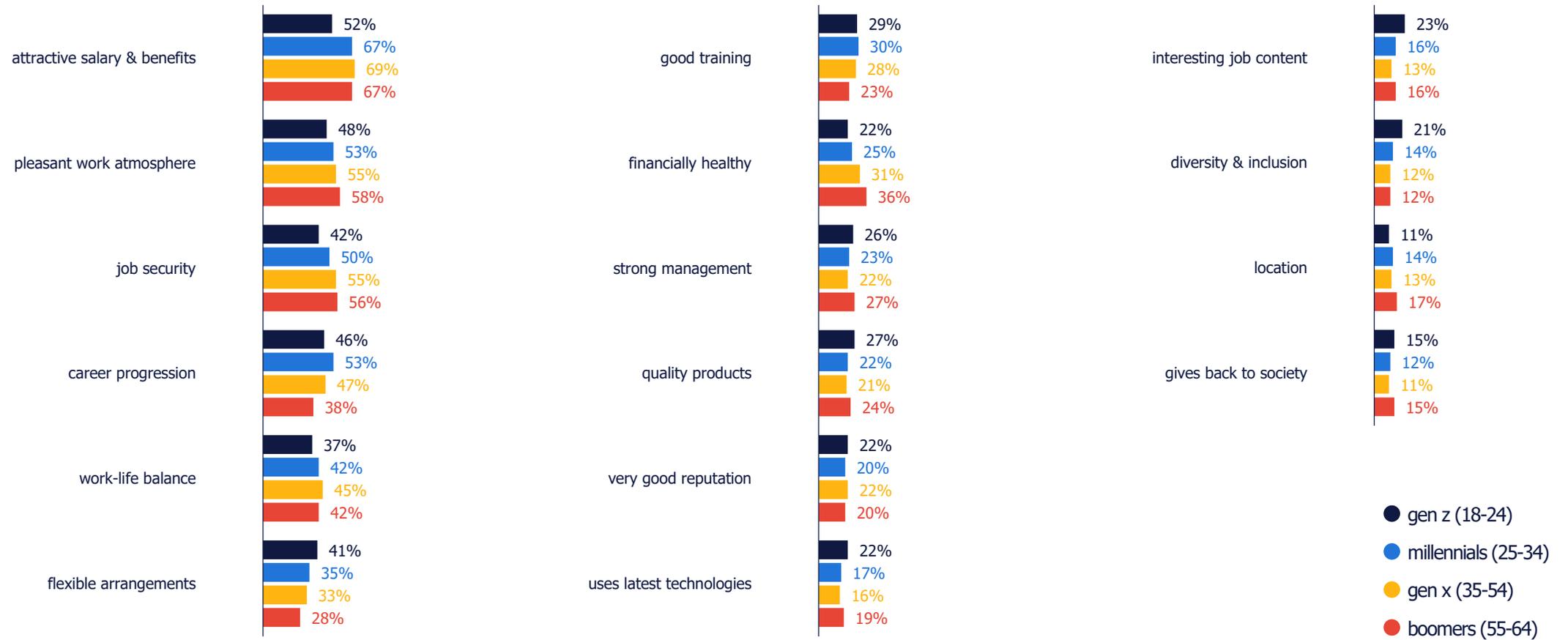
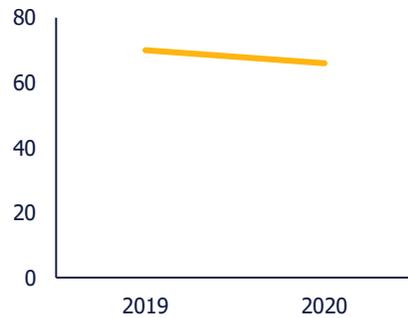# EVP driver importance
by gender.

EVP driver	male	female
attractive salary & benefits	62%	70%
pleasant work atmosphere	51%	56%
job security	49%	54%
career progression	46%	51%
work-life balance	41%	45%
flexible arrangements	31%	38%
good training	28%	29%
financially healthy	29%	27%
strong management	25%	22%
quality products	22%	22%
good reputation	24%	18%
uses latest technologies	20%	15%
interesting job content	17%	14%
diversity & inclusion	15%	14%
location	15%	12%
gives back to society	14%	11%

● male
● female

EVP driver importance
by education.

	higher	middle	lower
attractive salary & benefits	68%	64%	55%
pleasant work atmosphere	53%	54%	50%
job security	51%	52%	50%
career progression	51%	46%	42%
work-life balance	46%	40%	37%
flexible arrangements	36%	33%	31%

	higher	middle	lower
good training	30%	28%	26%
financially healthy	28%	28%	25%
strong management	26%	20%	16%
quality products	20%	24%	26%
very good reputation	18%	23%	28%
uses latest technologies	17%	18%	17%

	higher	middle	lower
interesting job content	15%	16%	17%
diversity & inclusion	14%	14%	17%
location	12%	15%	16%
gives back to society	12%	13%	14%

● higher
● middle
● lower

EVP driver importance by age.

	gen z (18-24)	millennials (25-34)	gen x (35-54)	boomers (55-64)
attractive salary & benefits	52%	67%	69%	67%
pleasant work atmosphere	48%	53%	55%	58%
job security	42%	50%	55%	56%
career progression	46%	53%	47%	38%
work-life balance	37%	42%	45%	42%
flexible arrangements	41%	35%	33%	28%
good training	29%	30%	28%	23%
financially healthy	22%	25%	31%	36%
strong management	26%	23%	22%	27%
quality products	27%	22%	21%	24%
very good reputation	22%	20%	22%	20%
uses latest technologies	22%	17%	16%	19%
interesting job content	23%	16%	13%	16%
diversity & inclusion	21%	14%	12%	12%
location	11%	14%	13%	17%
gives back to society	15%	12%	11%	15%

● gen z (18-24)
● millennials (25-34)
● gen x (35-54)
● boomers (55-64)

EVP driver importance
trends, total.

1/2

attractive salary & benefits

pleasant work atmosphere
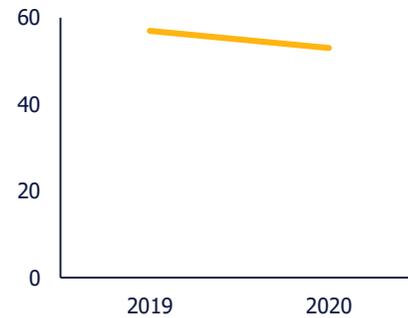
job security
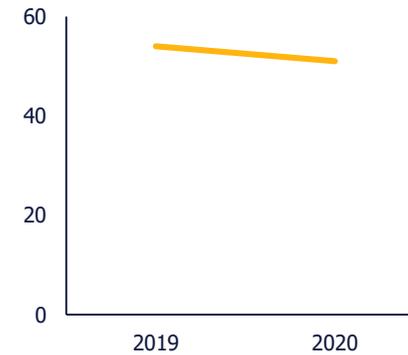
career progression
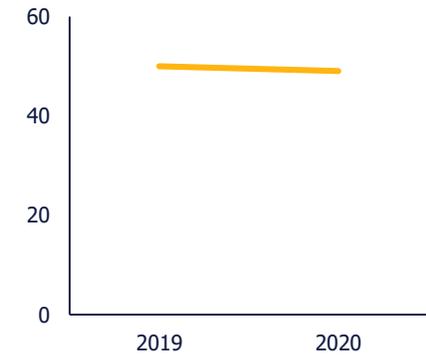
work-life balance
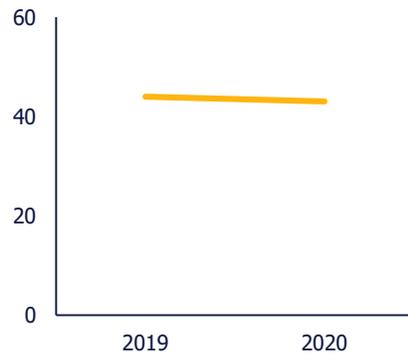
flexible arrangements
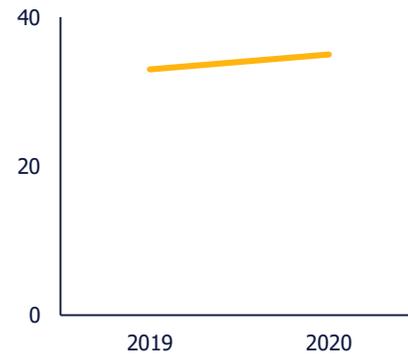
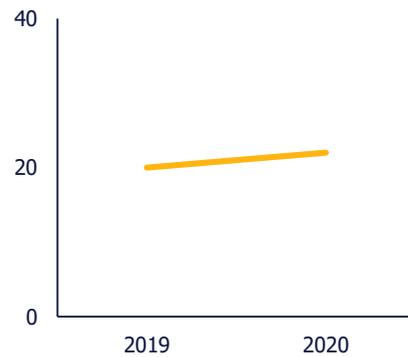### good training
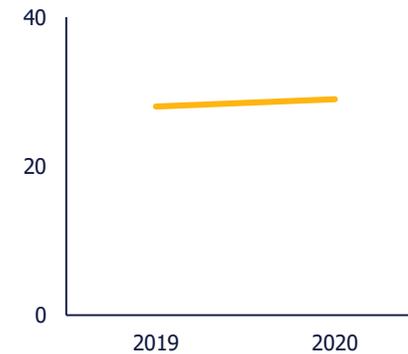
financially healthy
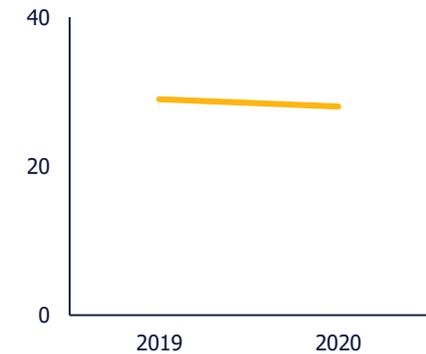
EVP driver importance
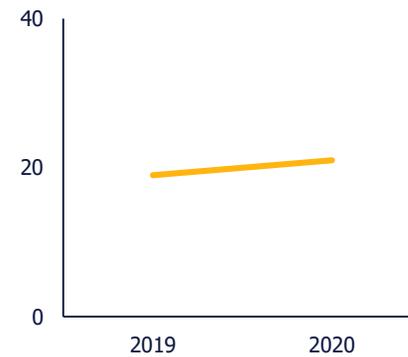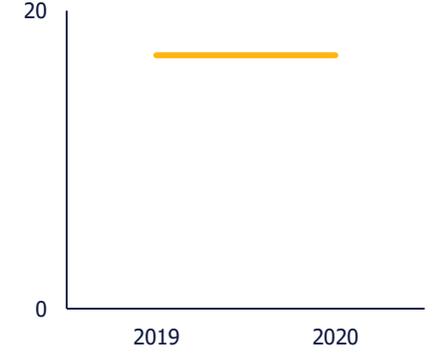## trends, total.

2/2
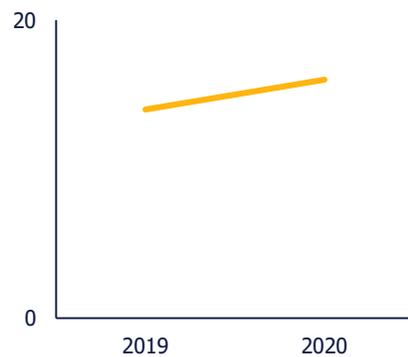
strong management
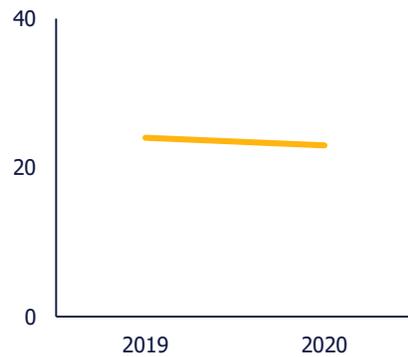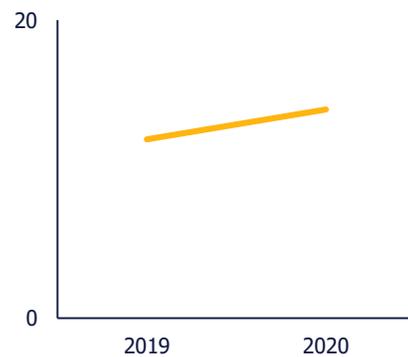

quality products

very good reputation
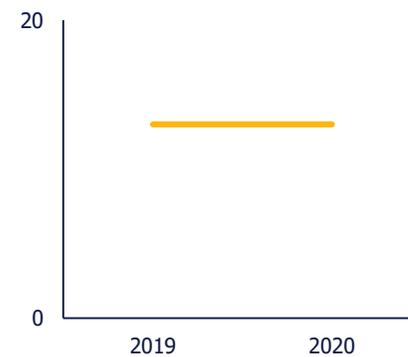

uses latest technologies

interesting job content
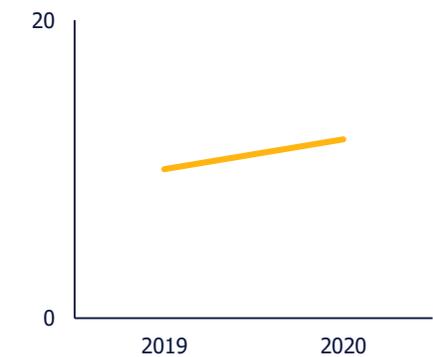

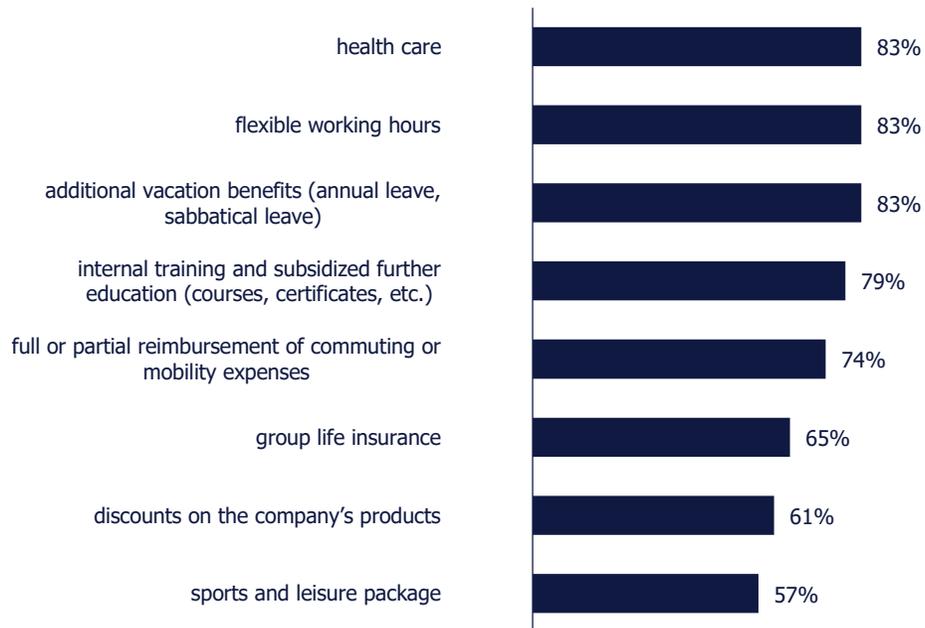### diversity & inclusion

location

gives back to society

deep dive employers

2020 employer brand research.

employee benefits that
romanians find attractive.

attractive benefits

Benefit	
health care	83%
flexible working hours	83%
additional vacation benefits (annual leave, sabbatical leave)	83%
internal training and subsidized further education (courses, certificates, etc.)	79%
full or partial reimbursement of commuting or mobility expenses	74%
group life insurance	65%
discounts on the company's products	61%
sports and leisure package	57%

● attractive (n=1,627)

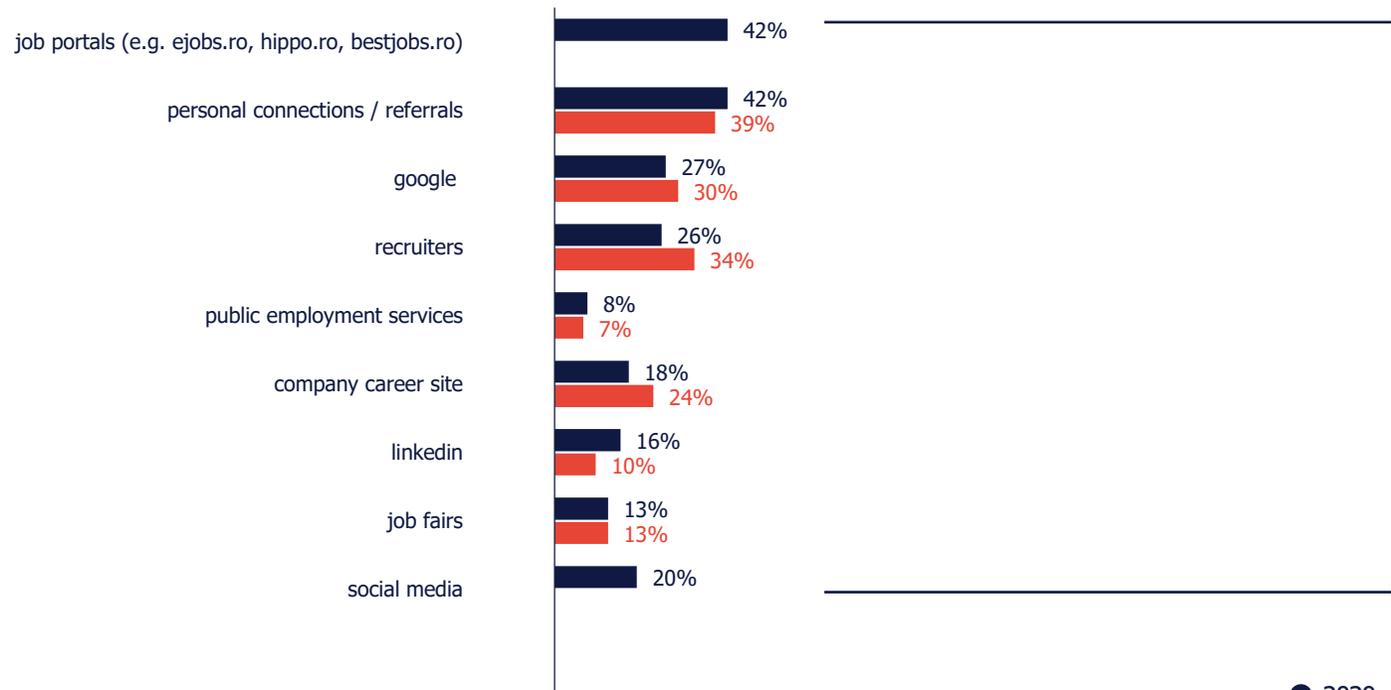| Benefit	
possibility of working from home	80%
subsidized meals / cafeteria plan	74%
childcare services and support	69%
travel insurance	62%
full or partial reimbursement of prescription glasses or contact lenses	58%
opportunity to buy company shares	54%
company phone	51%

● attractive (n=1,676)

*the 15 benefits were shown randomly in two sets of 8 and 7 benefits, respectively, each set shown to 50% of the sample.
For each bar chart, the base is respondents who are employed and received that particular set on the screen.
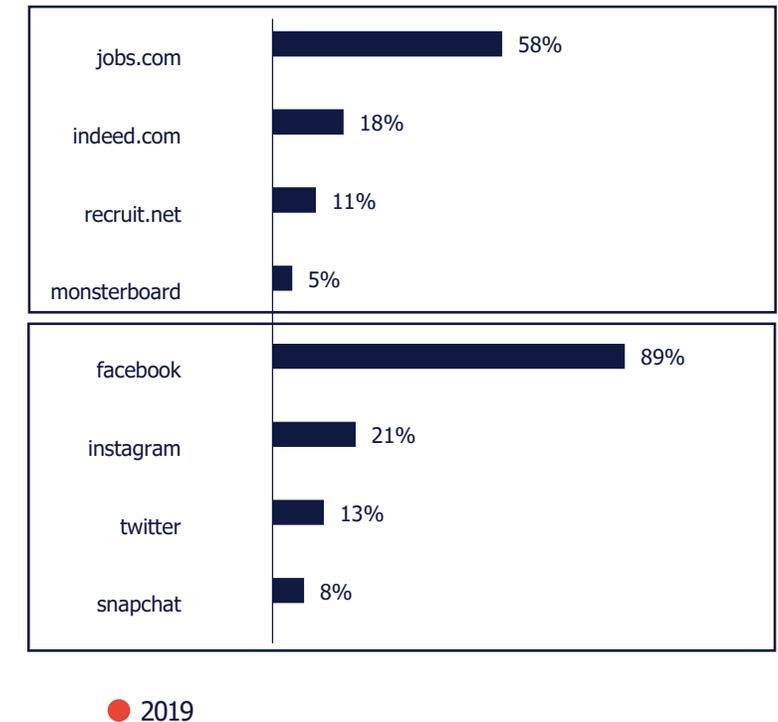
how do workers in romania
find new job opportunities.
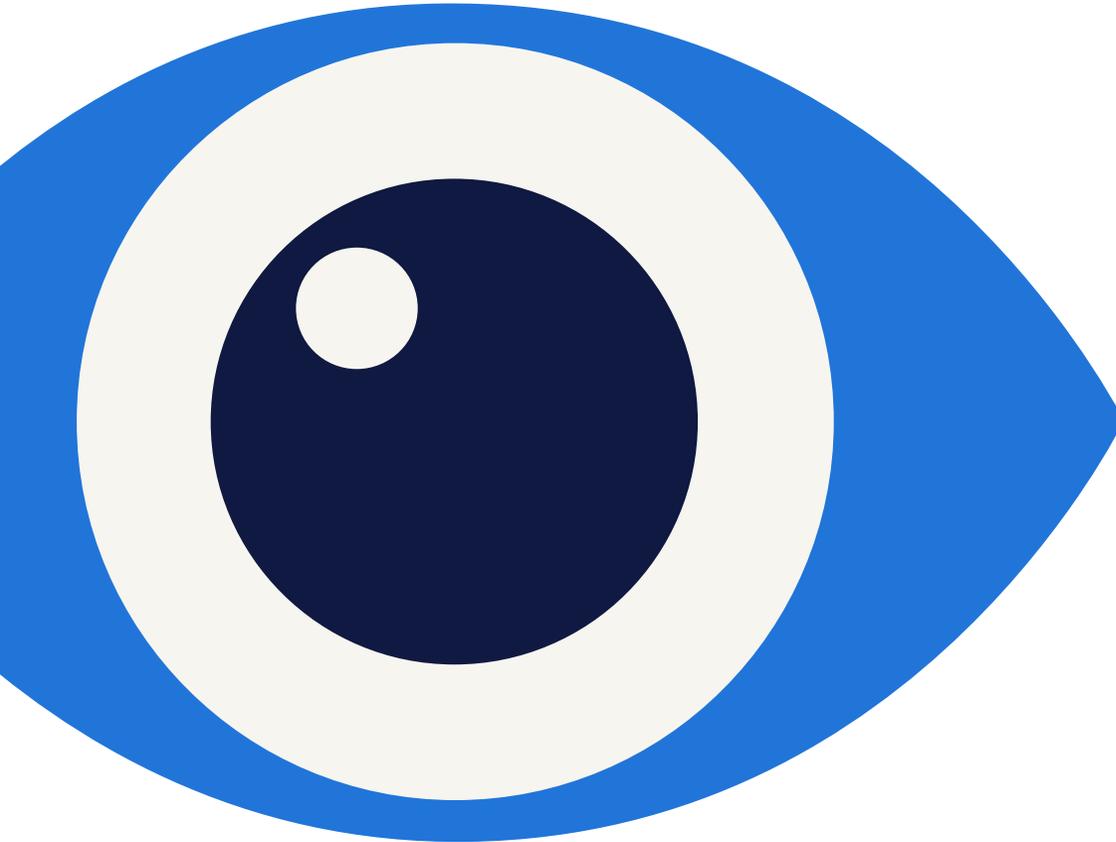
channels used to find new job opportunities

Channel	2020	2019
job portals (e.g. ejobs.ro, hippo.ro, bestjobs.ro)	42%	
personal connections / referrals	42%	39%
google	27%	30%
recruiters	26%	34%
public employment services	8%	7%
company career site	18%	24%
linkedin	16%	10%
job fairs	13%	13%
social media	20%	

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

	2020
jobs.com	58%
indeed.com	18%
recruit.net	11%
monsterboard	5%

	2020
facebook	89%
instagram	21%
twitter	13%
snapchat	8%

● 2020   ● 2019

perception of employer offer in romania and the region.

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

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

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

sector	top 3 EVP drivers		
	1	2	3
01 it technology	uses latest technologies	financially healthy	very good reputation
02 fmcg	financially healthy	very good reputation	uses latest technologies
03 services	financially healthy	uses latest technologies	very good reputation
04 telecom	uses latest technologies	financially healthy	very good reputation
05 pharma distributors	financially healthy	very good reputation	uses latest technologies
06 finance	financially healthy	job security	very good reputation
07 automotive	financially healthy	uses latest technologies	very good reputation
08 oil & gas	financially healthy	very good reputation	job security
09 manufacturing	financially healthy	uses latest technologies	very good reputation
10 retail	financially healthy	very good reputation	job security

methodology

2020 employer brand research.

methodology
why smart sampling?

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

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

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

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

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

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

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

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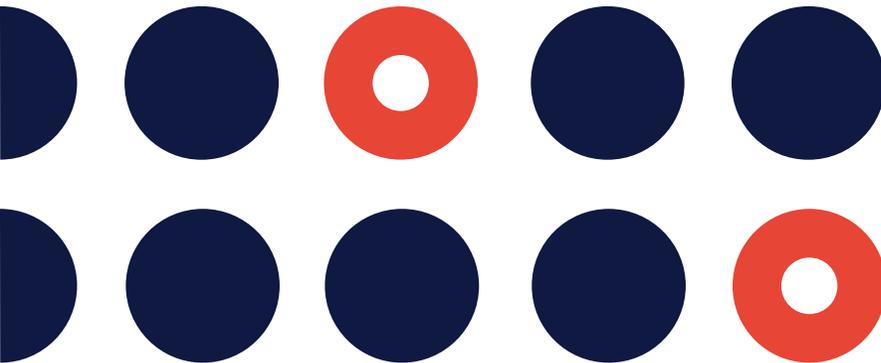
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company
specific slide.

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

let's talk.

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

randstad romania

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randstad

human forward.