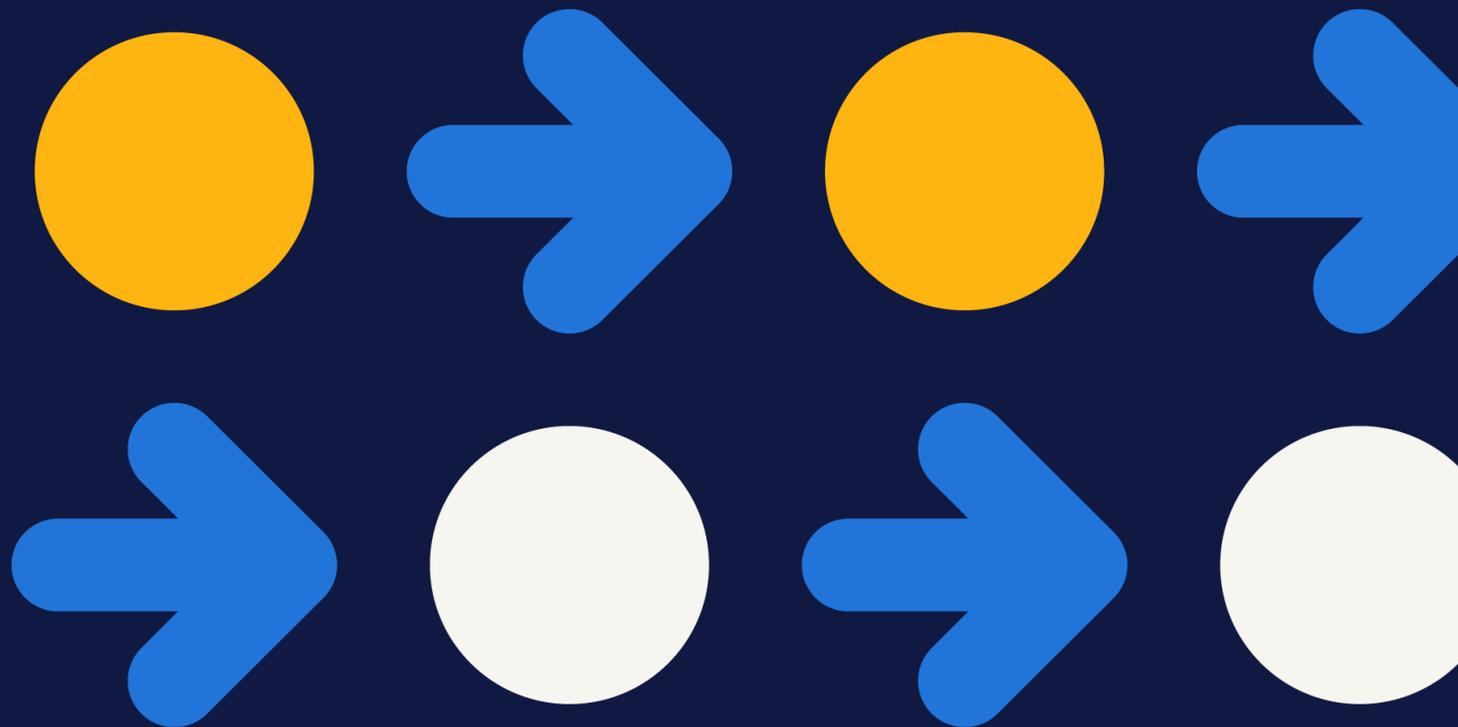


employer
brand research
2021



austria.

 randstad

human forward.

content.

- 1 introduction
- 2 employer attractiveness
- 3 switching behavior
- 4 COVID-19 in focus
- 5 further reading



what is the randstad employer brand research?

- a representative employer brand research based on perceptions of the general audience. Optimizing over 21 years of successful employer branding insights.
- an independent survey with over 190,000 respondents in 34 markets worldwide.
- a reflection of employer attractiveness for the market's 150 largest employers known by at least 10% of the population.
- provides valuable insights to help employers shape their employer brand.



the employer brand roadmap.



why employer branding matters.



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

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.

why employer branding matters.

19%

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

1-2x

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

#1

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

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

52%

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



34 markets surveyed covering more than 80% of the global economy.

argentina
australia
austria
belgium
brazil
canada
china
czech republic
france
germany
greece
hong kong SAR
hungary
india
italy
japan
kazakhstan
luxembourg
malaysia
mexico
new zealand
norway
poland
austria
romania
russia
singapore
spain
sweden
switzerland
the netherlands
uk
ukraine
usa



● markets surveyed

[click here](#) for detailed research methodology

worldwide

- over 190,000 respondents
- 6,493 companies surveyed

sample

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

country

- 3,853 respondents

fieldwork

- online interviews
- january 2021

length of interview

- 16 minutes



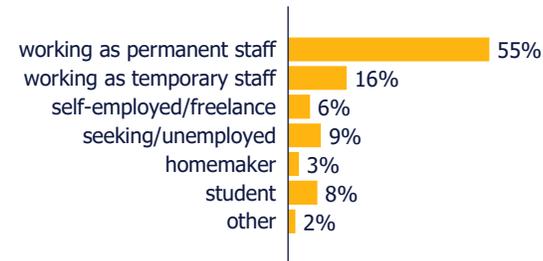
sample composition in austria

socio-demographics, employment status, region.

gender



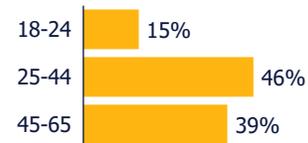
employment status



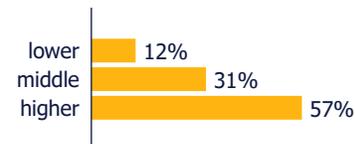
region



age



education



1. Wien, Niederösterreich, Burgenland
2. Steiermark, Kärnten
3. Oberösterreich, Tirol, Kärnten, Salzburg, Vorarlberg

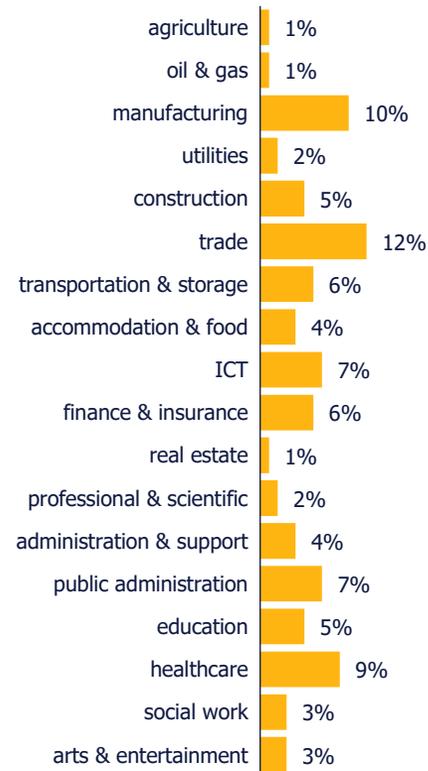
total sample: 3,853
fieldwork: january 2021



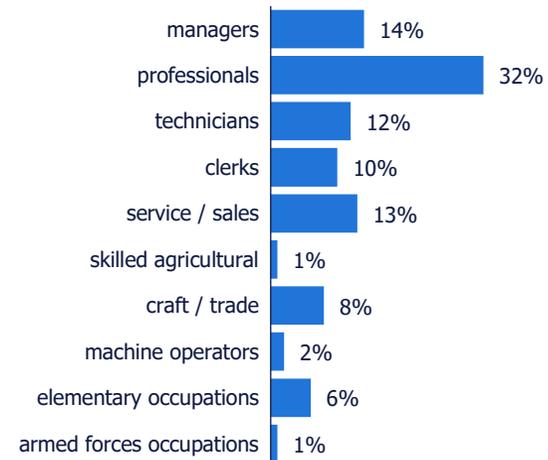
sample composition in austria

sector, function.

sector



function



base: currently employed (n=2,995)



austria

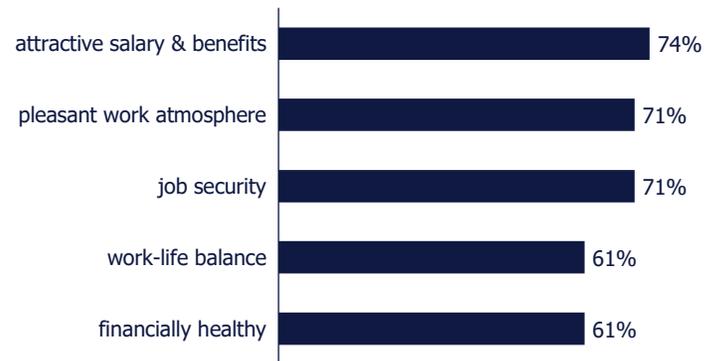
employer attractiveness.



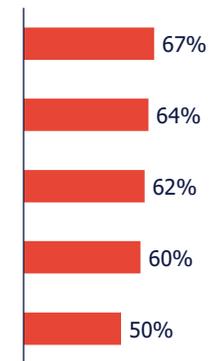
what potential employees want

the 5 most important drivers when choosing an employer.

top 5 most important drivers



europa 2021



austria top 5 drivers 2020

- 01 attractive salary & benefits
- 02 job security
- 03 pleasant work atmosphere
- 04 flexible arrangements
- 05 work-life balance

austria top 5 drivers 2019

- 01 work-life balance
- 02 attractive salary & benefits
- 03 job security
- 04 pleasant work atmosphere
- 05 flexible arrangements



*when comparing 2021 with previous years, please note that this question has been altered in that respondents are now free to choose as many drivers as they considered important from a list of 16 drivers whilst in previous years they were forced to pick exactly 5 out of these 16.

what potential employees want when choosing an employer.

most important driver

salary & benefits

Salary & benefits are as always, the most important driver overall and scores higher among women and the middle- and higher-educated. The second most important drivers are job security (more important to those older than 24 and middle-educated employees) and a pleasant work atmosphere (more important for women compared to other socio-demographics). Financial health and work-life balance together constitute the third most important driver. A COVID-19 safe work environment is one of the least important drivers for employees.

[click here](#) for a breakdown of the EVP importance results by socio-demographic profile.

employers' proposition

financial health and job security

Austrian employees rate their own employers highest on financial health and job security. Lower ratings are given by employees for: possibility to work remotely, career progression and salary & benefits (especially rated lower by women and higher-educated employees). Compared to other generations, those younger than 24 rate their own employer higher on career progression opportunities. When looking at regional differences, it is clear that employees living in Ostösterreich are the least satisfied with their salary & benefits and the financial health of their employer.

[click here](#) for a deep dive into the most attractive sectors and employers in 2021.

recommended employer focus

work-life balance

Work-life balance is the third most important driver for Austrians, yet it is rated relatively low when it comes to the offerings of one's own employer. It is, therefore, recommended that the average employer in Austria pays more attention to the work-life balance of their employees.

Employees also rate their employer rather low on salary & benefits, despite this being the most important to them.



what do potential employees want job collars in focus.

white-collar

63%

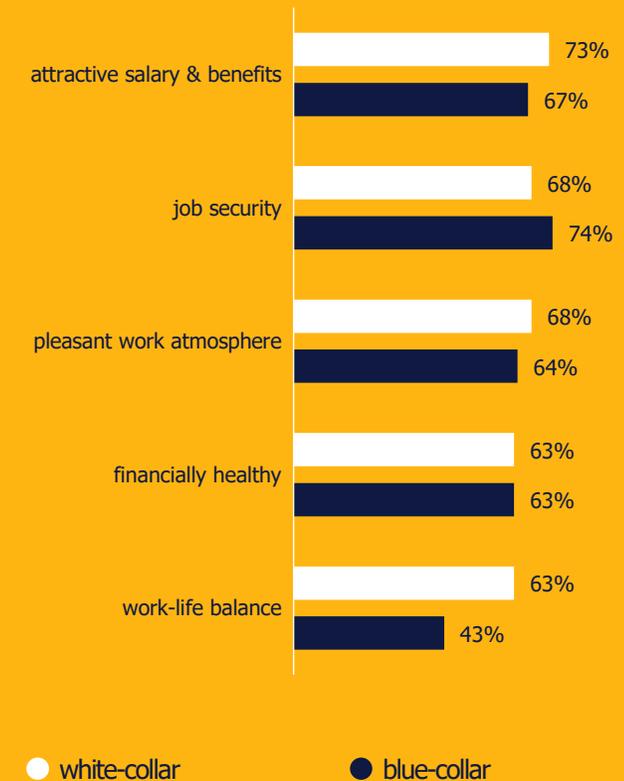
of white-collar employees consider work-life balance important in an ideal employer. Also, white-collar professionals find the possibility to work remotely considerably more important than blue-collar workers (54% vs. 29%).

blue-collar

74%

of blue-collar workers consider job security more important than white-collar employees do (68%). Blue-collar workers are somewhat less demanding as they consider only 7 drivers essential (vs. 8 among white-collar workers).

most important attributes



job-switching behavior



in focus.

switching behavior finding another employer.

1 in 11 Austrians changed employer

9% Of Austrian employees changed their employer in the last 6 months of 2020, with the 18-to-24-year-olds more likely than those over 35 years old to do so. Furthermore, 17% intend to switch employers in the first 6 months of 2021 and this includes relatively more younger people and high-educated employees. In line with the recommended focus on work-life balance, we see that for those who changed their employer in the last 6 months of 2020, work-life balance is more important (70%) compared to those who stayed by their employer (59%) and comes together with pleasant work atmosphere in the second place.

job portals and personal connections – top channels to find jobs

Job portals (30%) and personal connections (27%) are the most used channels by switchers. Karriere.at is the leading portal in this regard. The socio-demographics do not have an influence on the choice of channels, but men tend to make use of staffing agencies more often than women do.



most important attributes switchers vs. stayers.

switchers

2021

9%

changed employer in the
past 6 months.

2021

11%

of those affected by
COVID changed employer
in the past 6 months.

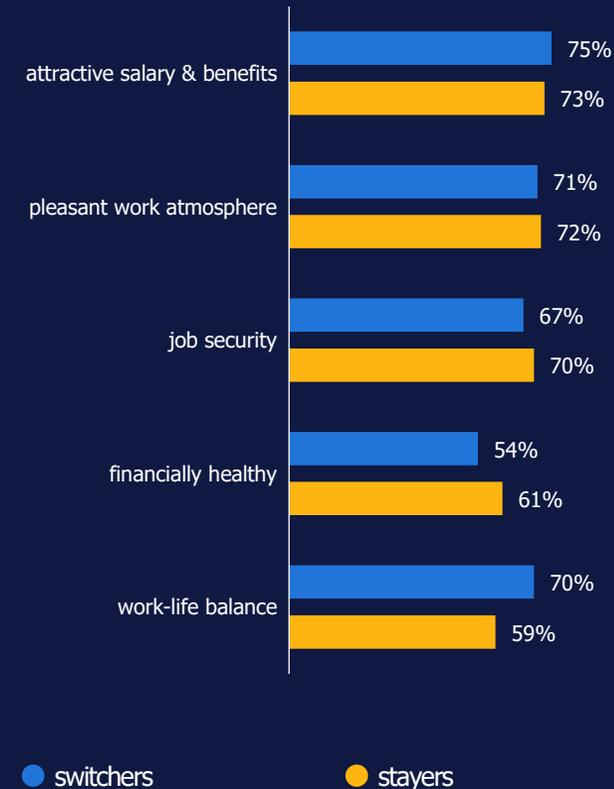
stayers

2021

91%

stayed with their employer
in the past 6 months.

most important attributes



* past 6 months = last half of 2020. REBR2021 covers a period of 6 months (as opposed to 12 months in the past) in order to better capture the impact of COVID-19.

switching behavior job collars in focus.

white-collar switchers

10%

of white-collar employees changed their employer in the last half of 2020. This is not too different from the average Austrian employee who changed employers.

blue-collar intenders

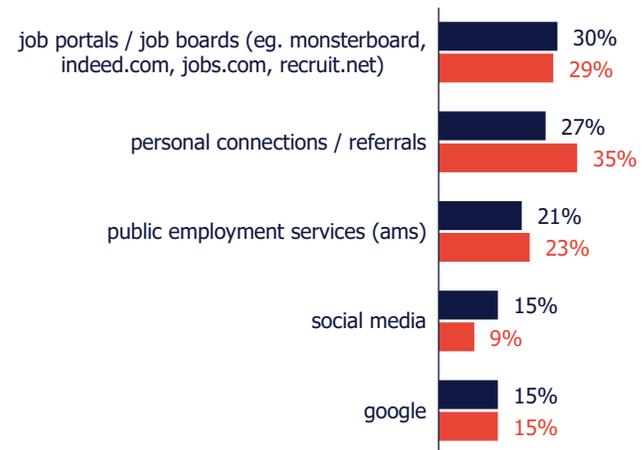
17%

of blue-collar workers intend to switch to another employer in the first half of 2021, and this is slightly higher when compared to white-collar professionals.

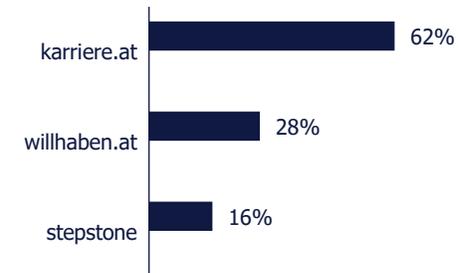


how do employees in austria find new job opportunities.

top 5 channels used to find new job opportunities



top 3 job portals



top 3 social media channels

*base is too small for 2021

● 2021 ● 2020



COVID-19

in focus.



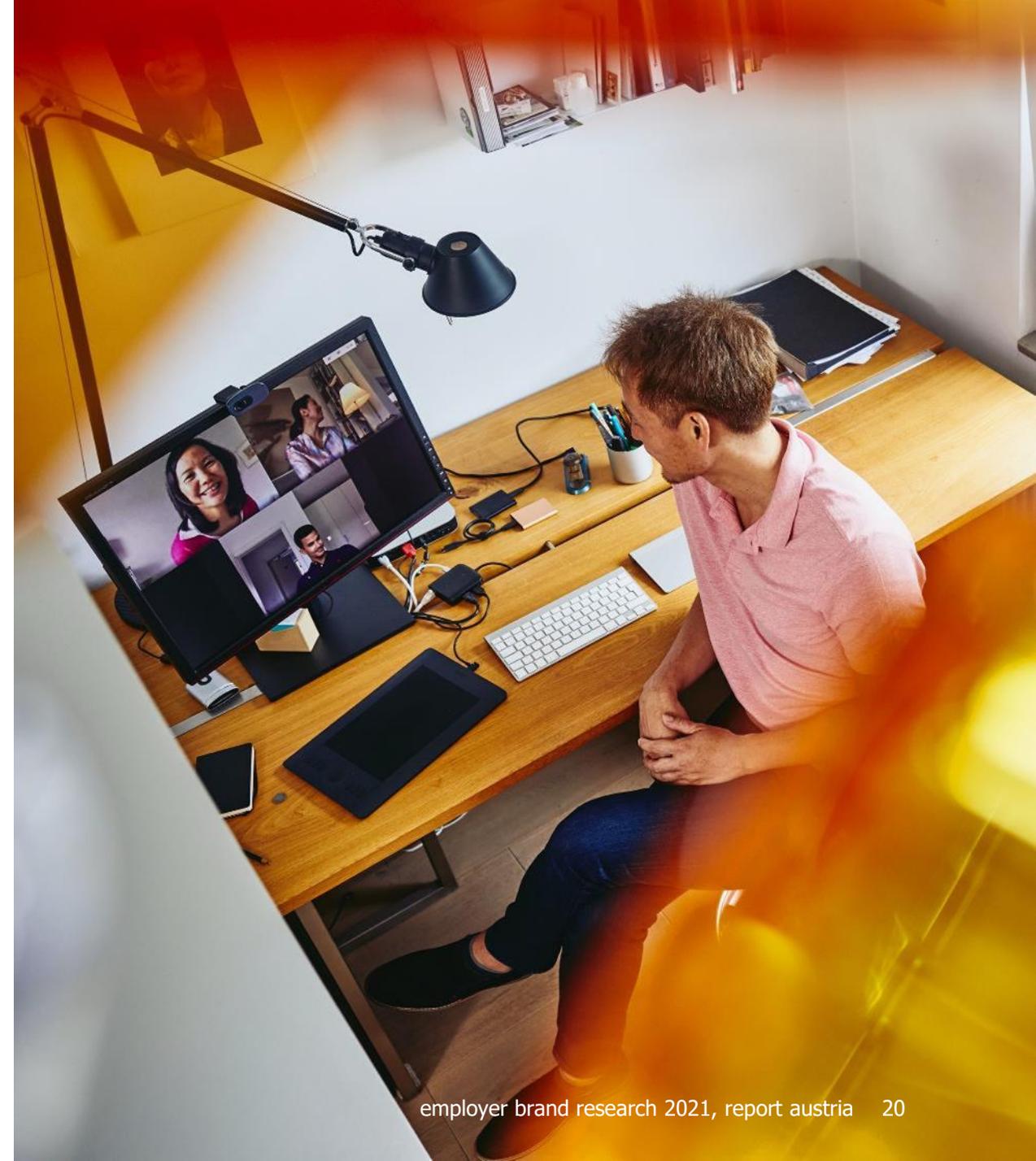
COVID-19 and its impact on the labor market.

possibility of working remotely rather important

Even though the possibility to work remotely is not ranked as one of the most important drivers for Austrian (potential) employees, 45% of Austrian workforce is attracted by the possibility to work remotely. Women and the higher-educated are more inclined to rank this driver as important. Those working full-time (76%) rate the possibility to work remotely slightly more important than those who work part-time (71%) .

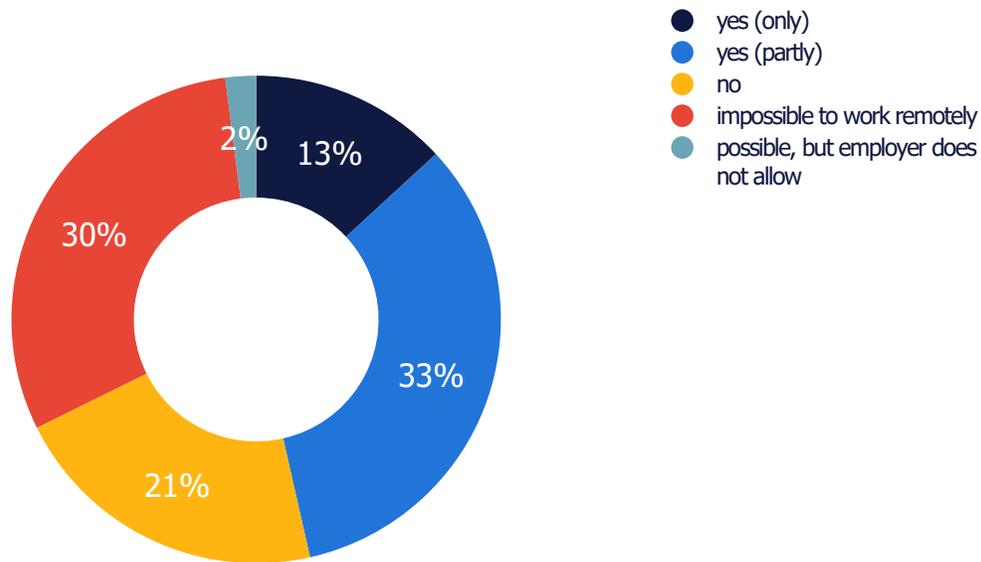
half of the employees started to work (more) remotely during COVID-19 pandemic

Of the 46% employees who said they started working more remotely, around 60% were involved in the decision to work remotely, whereas for the rest of employees working remotely was decided for them by their employer and/or authorities.



remote working due to COVID-19.

did you start working (more) remotely/ from home due to the COVID-19 crisis?



austria

20%

of the employees who said they worked remotely, do so out of their own decision.

Having an influence or not on the decision to work more remotely is a universal matter as it is not related to age or gender. However, it can be seen that it is primarily the higher-educated employees that started working more remotely.

Only 2% of employees who can work from home are not allowed to do so by their employer. Next to that, for 30% of employees, jobs are bound to the premises which makes working from home or elsewhere impossible. This is especially true for 48% of the lower-educated employees.

europa

23%

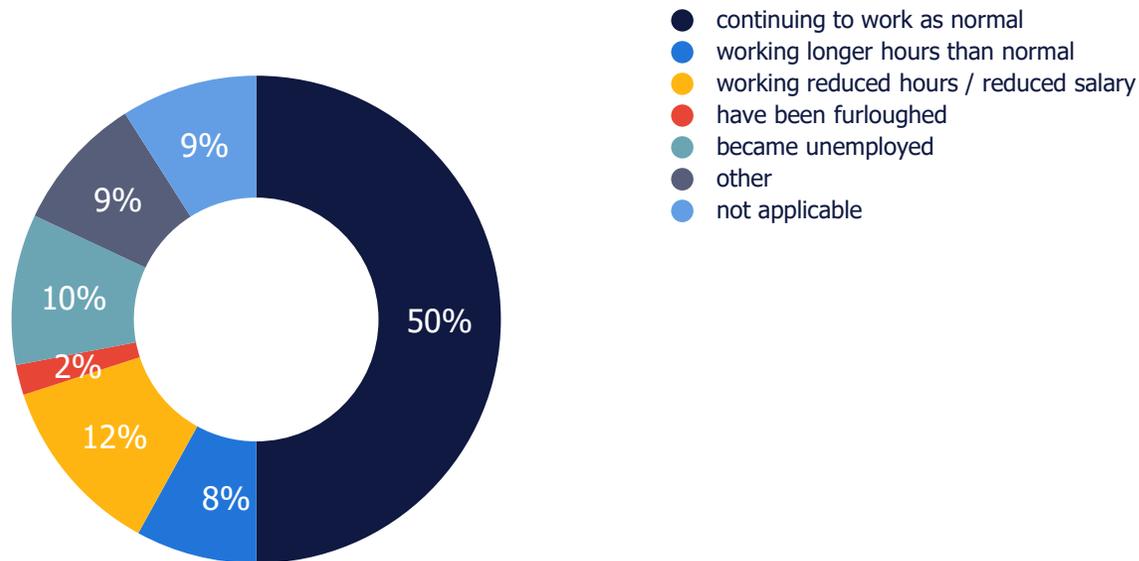
of the employees who said they worked remotely, do so out of their own decision.

When looking across Europe, we do not see major differences among the socio-demographics as far as the decision to work remotely is concerned. Most European employees (40%) were obliged to work more remotely by their employer and / or the authorities.

A very small proportion of Europeans who could work from home were not allowed to do so by their employer (2%). For 28% of Europeans, working from home is impossible as their jobs are bound to the premises with this being most often the case for the lower-educated (40%).

employment situation changes due to COVID-19.

how COVID-19 changed one's employment situation



two in five employees saw their employment situation change

41% of employees were either furloughed, became unemployed, or worked more or fewer hours than usual or for other reasons saw their employment situation change due to COVID-19.

One's socio-demographics background (gender, age, education level) plays no major role into the likelihood to have seen one's employment situation change due to COVID-19.

However, those aged 25 to 34 were more likely to work more hours (11%).

Most Austrians continued to work as normal with men (55%) more likely to do so than women (46%).

europa

39%

have seen their employment situation change due to COVID-19.

job loss fear in 2021 intention to switch.

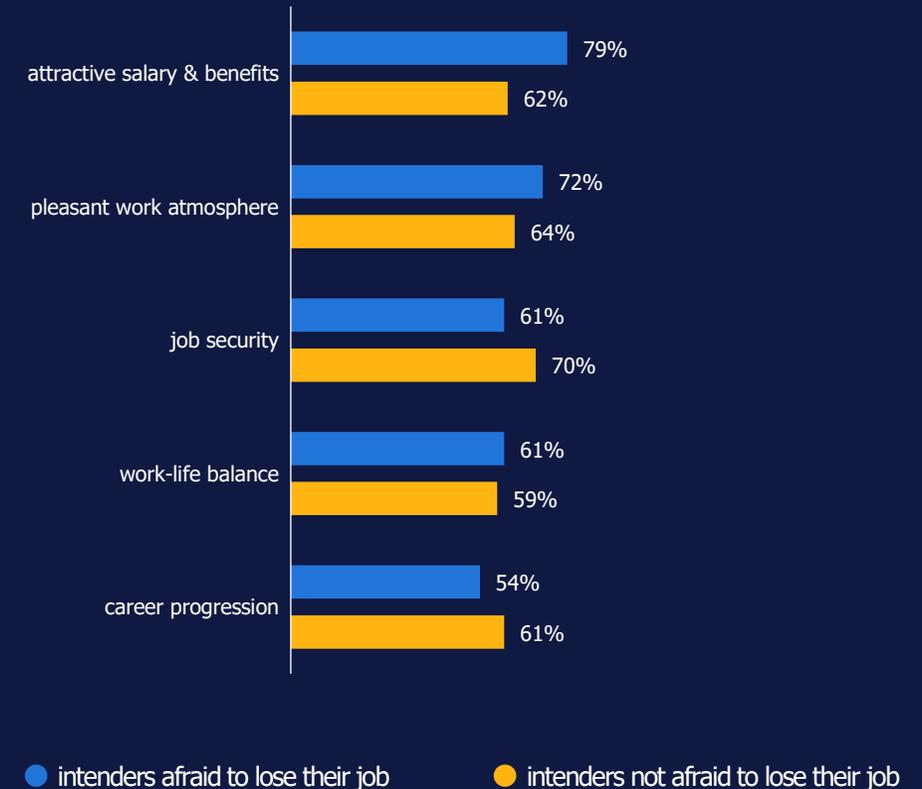
22%

of the employees who are afraid of losing their job, plan to change their job in the next 6 months.

8%

of the employees who are not afraid of losing their job, plan to change their job in the next 6 months.

most important attributes



* next 6 months = first half of 2021. REBR2021 covers a period of 6 months (as opposed to 12 months in the past) in order to better capture the impact of COVID-19.

intention to switch amongst those affected by COVID-19.

intenders

2021

17%

plan to change employer in the next 6 months.

intenders

2021

27%

of those affected by COVID-19 plan to change their employer in the next 6 months.



* next 6 months = first half of 2021. REBR2021 covers a period of 6 months (as opposed to 12 months in the past) in order to better capture the impact of COVID-19.

If one's employment situation has changed due to COVID-19, the intention to change to a new employer is considerably higher (27%) than those who just intend to change employers (17%).

The way Austrian employers have supported their workforce and handled the pandemic has had a very positive impact on loyalty among employees. No less than 51% of employees now feel that they are more loyal to their employer as opposed to a mere 9% who feel less loyal to their employer. The impact on loyalty is regardless of gender, age or region. Nor does it make any difference if one is obliged to work from home or if that is a decision one could make for themselves.

job loss fear in 2021 due to COVID-19.

one in five employees fear losing their job

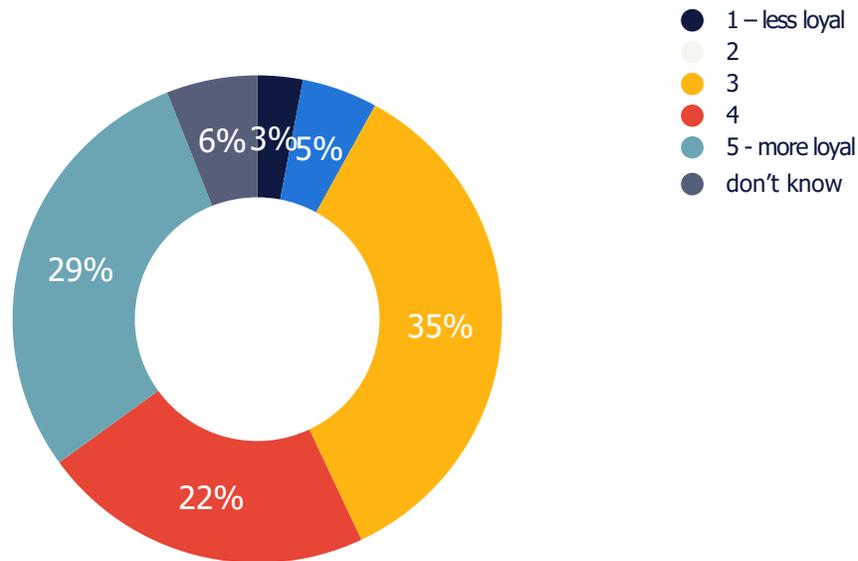
Most Austrians (62%) have a feeling of job security despite the COVID-19 situation, but a substantial part of the population does fear job loss in 2021 (18%). Men (41%) are less likely than women (49%) to feel very concerned about losing their job in 2021.

Fear of job loss in Austria is not correlated with either age, education level or region.



loyalty towards employers during the pandemic.

loyalty to one's employer based on how well supported employees felt during the COVID-19 pandemic



works only remotely

57% of the employees who only work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

works partly remotely

48% of the employees who work partly from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

obliged to work remotely

46% of the employees who were obliged by their employer / authorities to work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

own decision to work remotely

52% of the employees who decided on their own to work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

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.

randstad austria

Alexander Becker

alexander.becker@randstad.at



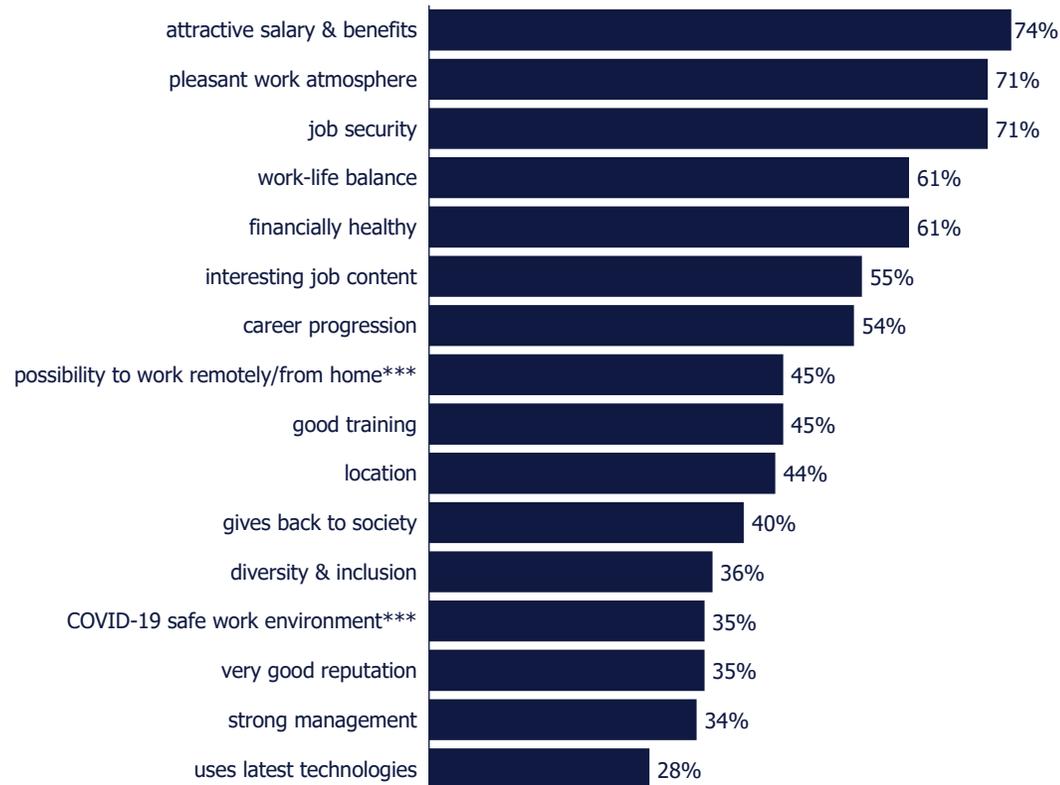
appendix 1

deep dive
EVP drivers.

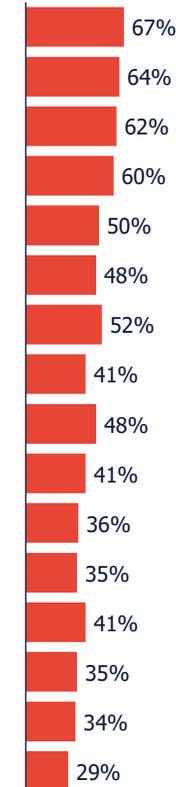


what potential employees want the most important criteria when choosing an employer.

important criteria



europa 2021



austria 2020

- 01 work-life balance
- 02 attractive salary & benefits
- 03 job security
- 04 pleasant work atmosphere
- 05 flexible arrangements***
- 06 good training
- 07 interesting job content
- 08 location
- 09 strong management
- 10 career progression
- 11 financially healthy
- 12 very good reputation
- 13 diversity & inclusion
- 14 gives back to society
- 15 quality products***
- 16 uses latest technologies

austria 2019

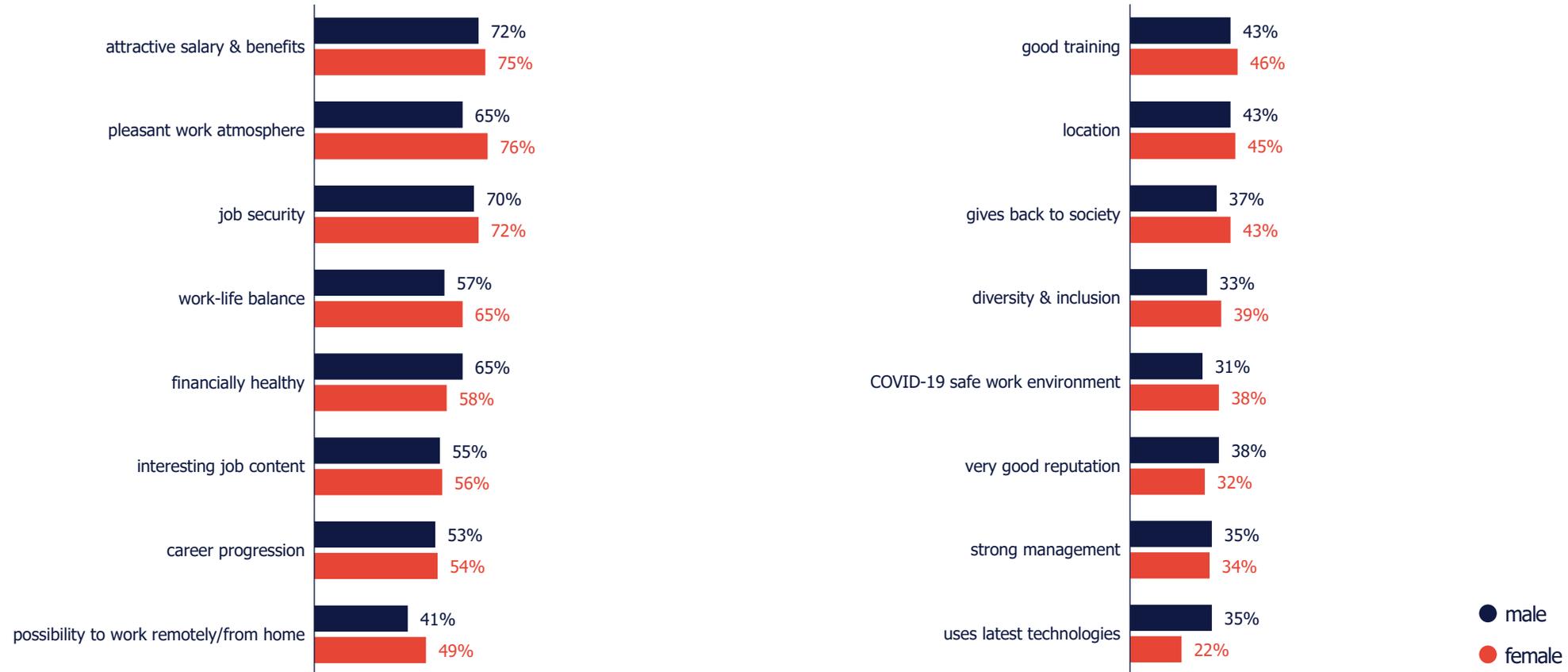
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- 16 uses latest technologies

* when comparing 2021 with previous years, please note that this question has been altered in that respondents are now free to choose as many drivers as they considered important from a list of 16 drivers whilst in previous years they were forced to pick exactly 5 out of these 16.

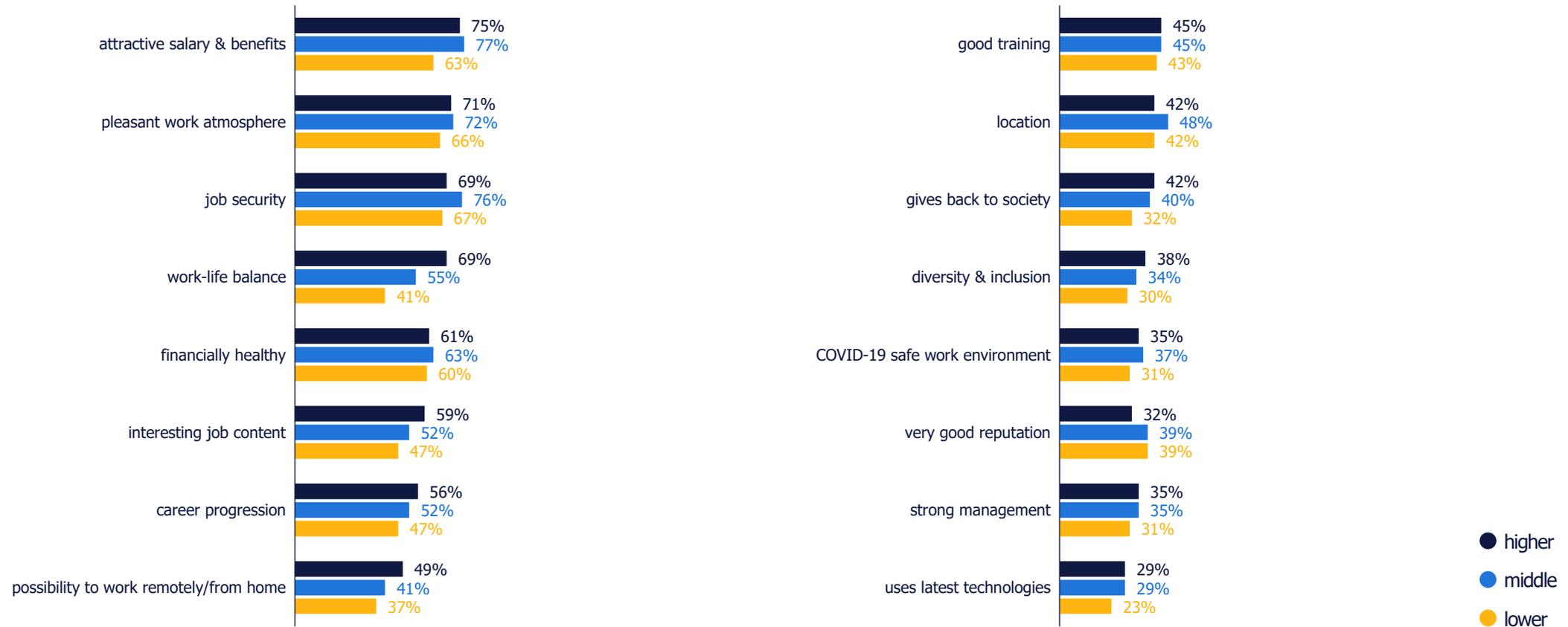
***only researched in 2021 / interrupted in 2021



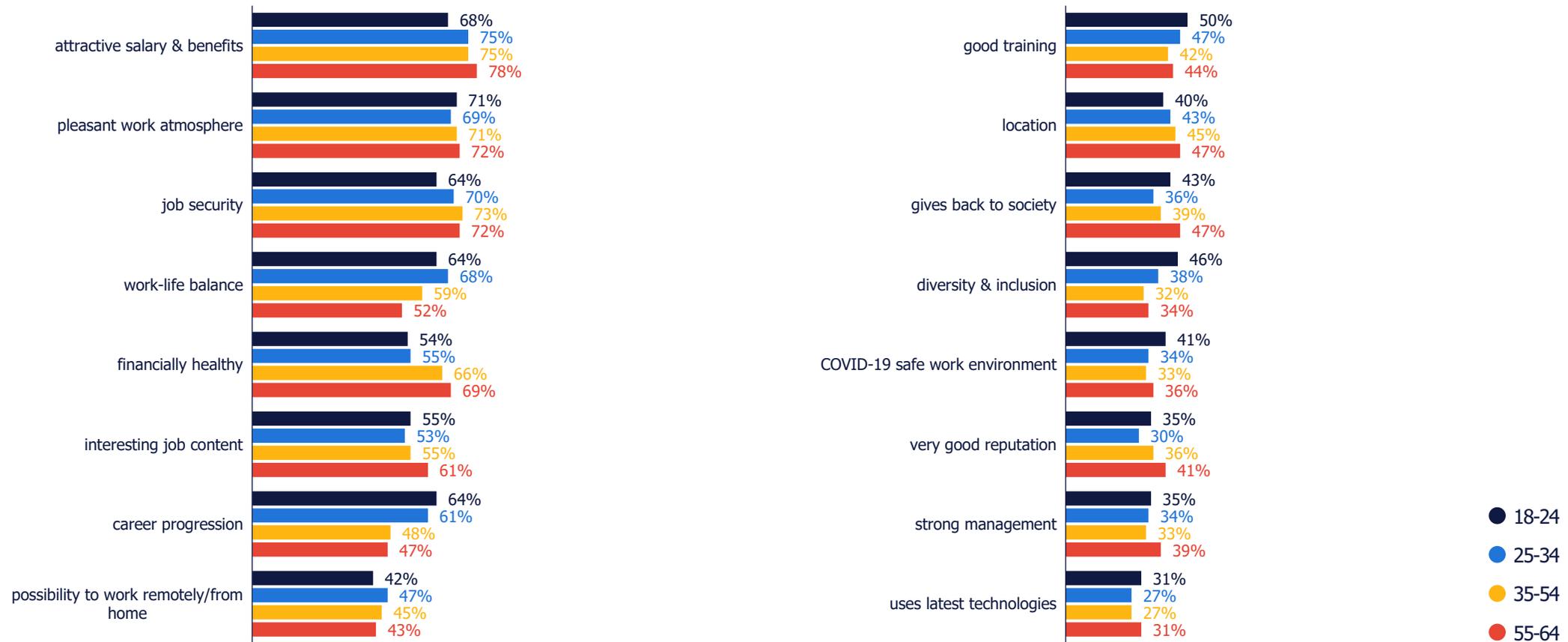
EVP driver importance by gender.



EVP driver importance by education.

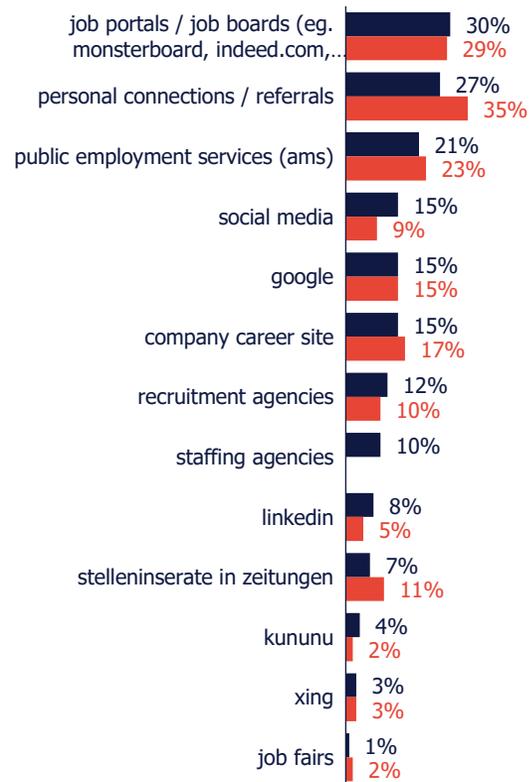


EVP driver importance by age.

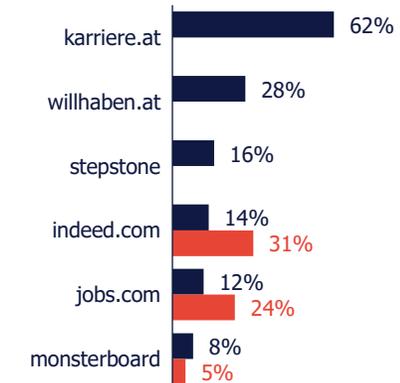


how do employees in austria find new job opportunities.

channels used to find new job opportunities



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



*base is too small for 2021

● 2021

● 2020



appendix 2



deep dive
employers.

perception of employer offer in austria.

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	general perception of employers in austria	profile of ideal employer
01 job security	01 financially healthy	01 attractive salary & benefits
02 financially healthy	02 very good reputation	02 pleasant work atmosphere
03 very good reputation	03 job security	03 job security
04 COVID-19 safe work environment	04 COVID-19 safe work environment	04 work-life balance
05 pleasant work atmosphere	05 career progression	05 financially healthy
06 gives back to society	06 attractive salary & benefits	06 career progression
07 work-life balance	07 pleasant work atmosphere	07 possibility to work remotely/from home
08 attractive salary & benefits	08 work-life balance	08 gives back to society
09 career progression	09 gives back to society	09 COVID-19 safe work environment
10 possibility to work remotely/from home	10 possibility to work remotely/from home	10 very good reputation



perception of employer offer in austria and the region.

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



employers in austria are perceived to offer

- 01 financially healthy
- 02 very good reputation
- 03 job security
- 04 COVID-19 safe work environment
- 05 career progression
- 06 attractive salary & benefits
- 07 pleasant work atmosphere
- 08 work-life balance
- 09 gives back to society
- 10 possibility to work remotely/from home

employers in europe are perceived to offer

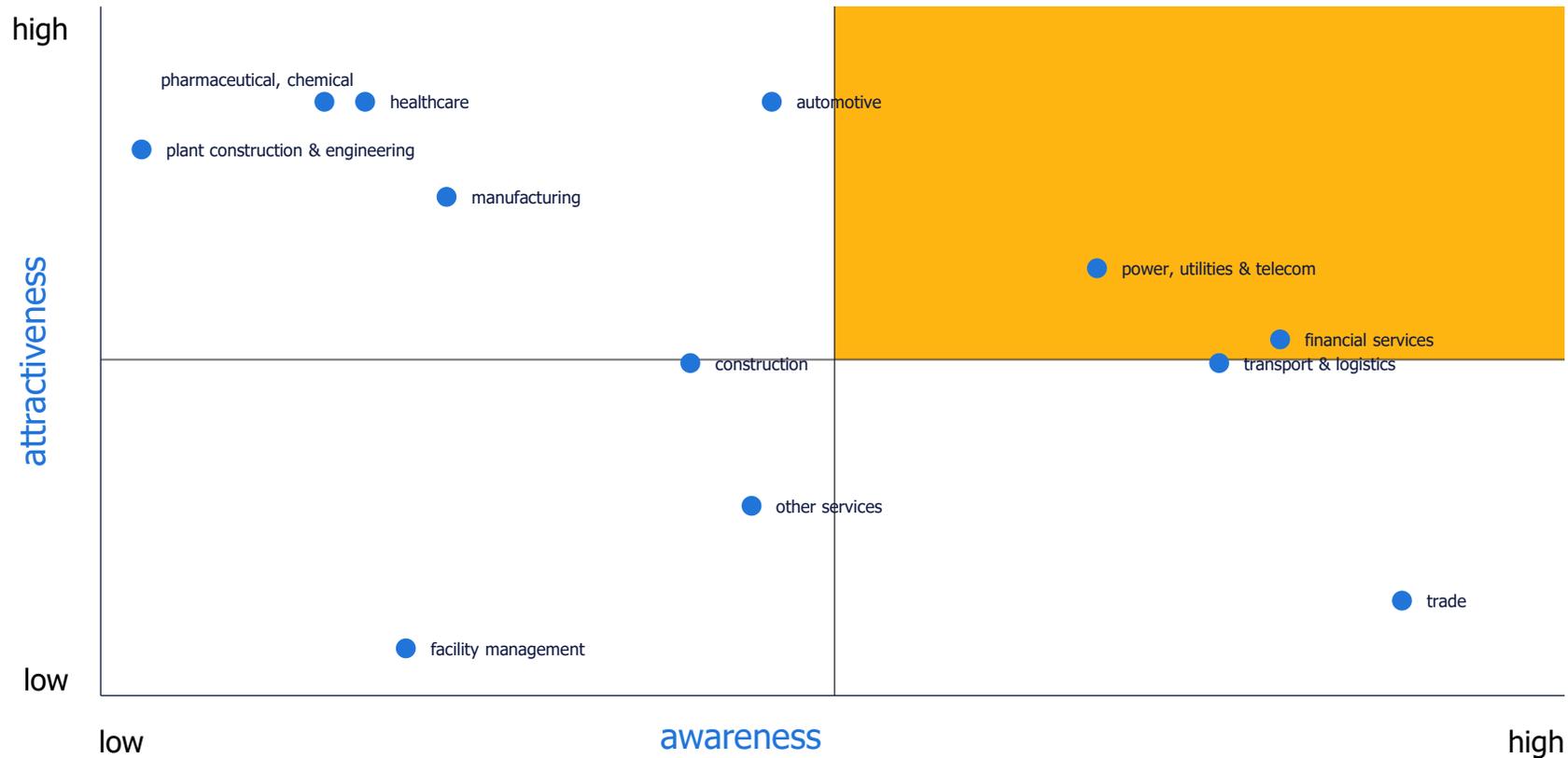
- 01 financially healthy
- 02 very good reputation
- 03 job security
- 04 COVID-19 safe work environment
- 05 career progression
- 06 attractive salary & benefits
- 07 pleasant work atmosphere
- 08 work-life balance
- 09 gives back to society
- 10 possibility to work remotely/from home

sector

insights.



top performing sectors in austria 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.



austria's best performing companies by sector.

1/2

sector	top 3 companies		
	1	2	3
01 healthcare	Kepler Universitätsklinikum	Klinikum Wels-Grieskirchen	Ordensklinikum Linz
02 pharmaceutical, chemical	Boehringer Ingelheim	Borealis	Sandoz
03 automotive	AVL List	BMW Österreich	BRP-Rotax
04 plant construction & engineering	Engel Austria	Andritz	SSI Schäfer
05 manufacturing	Siemens	Infineon	FACC
06 power, utilities & telecom	TIWAG-Tiroler Wasserkraft	VERBUND	Wiener Netze
07 financial services	Oesterreichische Nationalbank	Erste Bank	Raiffeisen Bank
08 construction	VAMED	STRABAG	PORR
09 transport & logistics	ÖBB	Flughafen Wien	Wiener Linien
10 other services	Bundesrechenzentrum	Casinos Austria	Holding Graz



austria's best performing companies by sector.

2/2

top 3 companies

sector

1

2

3

11 trade

Porsche Holding

IKEA

dm drogerie markt

12 facility management

Wiener Wohnen

Dussmann

ISS Facility Services



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

1/2

top 3 EVP drivers

sector	1	2	3
01 healthcare	job security	financially healthy	very good reputation
02 pharmaceutical, chemical	financially healthy	job security	COVID-19 safe work environment
03 automotive	financially healthy	very good reputation	career progression
04 plant construction & engineering	financially healthy	very good reputation	career progression
05 manufacturing	financially healthy	very good reputation	job security
06 power, utilities & telecom	financially healthy	job security	very good reputation
07 financial services	financially healthy	COVID-19 safe work environment	job security
08 construction	financially healthy	very good reputation	job security
09 transport & logistics	financially healthy	job security	very good reputation
10 other services	financially healthy	job security	COVID-19 safe work environment



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

2/2

top 3 EVP drivers

sector	1	2	3
11 trade	financially healthy	very good reputation	job security
12 facility management	financially healthy	job security	COVID-19 safe work environment



top



employers.

top employers to work for in austria.

top 10 employers 2021

- 01 Oesterreichische Nationalbank
- 02 AVL List
- 03 Siemens
- 04 BMW Österreich
- 05 Kepler Universitätsklinikum
- 06 Boehringer Ingelheim
- 07 BRP-Rotax
- 08 Infineon
- 09 ÖBB
- 10 Rosenbauer

top 10 employers 2020

- 01 Oesterreichische Nationalbank
- 02 AVL List
- 03 Fronius
- 04 Siemens
- 05 Steiermärkische Krankenanstaltengesellschaft (KAGes)
- 06 Bundesrechenzentrum
- 07 Flughafen Wien
- 08 ÖBB
- 09 Infineon
- 10 BMW Österreich

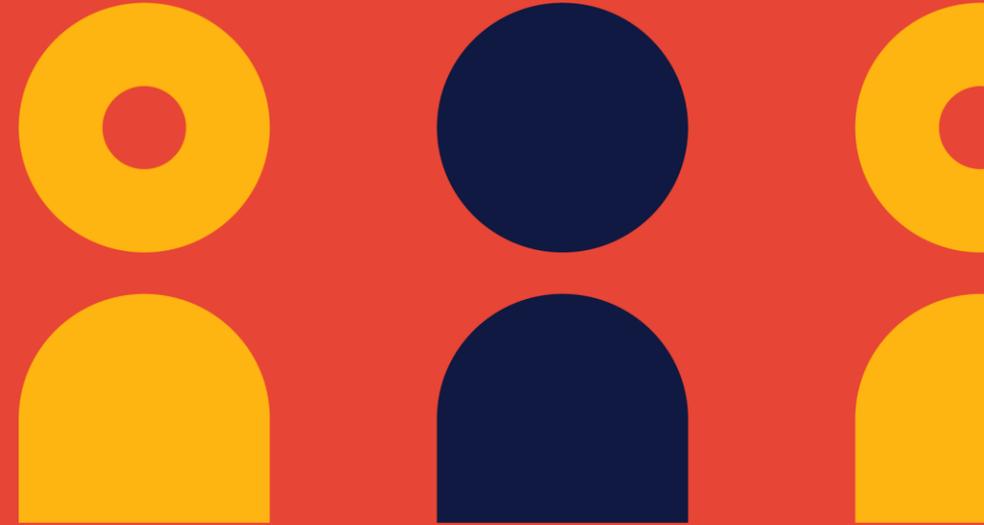
austria's top 3 EVP drivers of the top 5 companies.

top 5 companies	1	2	3
1 Oesterreichische Nationalbank	financially healthy	job security	very good reputation
2 AVL List	very good reputation	financially healthy	career progression
3 Siemens	financially healthy	very good reputation	career progression
4 BMW Österreich	financially healthy	very good reputation	career progression
5 Kepler Universitätsklinikum	job security	career progression	very good reputation

austria's top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	AVL List	Oesterreichische Nationalbank	Siemens
pleasant work atmosphere	AVL List	Infineon	Klinikum Wels-Grieskirchen
job security	Bundesrechenzentrum	Oesterreichische Nationalbank	Klinikum Wels-Grieskirchen
work-life balance	Bundesrechenzentrum	TIWAG-Tiroler Wasserkraft	Oesterreichische Nationalbank
financially healthy	Bundesrechenzentrum	Oesterreichische Nationalbank	Hofer
career progression	Kepler Universitätsklinikum	AVL List	Infineon
possibility to work remotely/from home	Wiener Städtische Versicherung	Generali	UNIQA
gives back to society	TIWAG-Tiroler Wasserkraft	Klinikum Wels-Grieskirchen	Salzburger Landeskliniken (SALK)
COVID-19 safe work environment	Bundesrechenzentrum	TIWAG-Tiroler Wasserkraft	Sandoz
very good reputation	AVL List	Rosenbauer	Siemens

appendix 3



methodology.

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 COVID-19 safe work environment
 - 03 very good reputation
 - 04 job security
 - 05 career progression
 - 06 gives back to society
 - 07 possibility to work remotely/from home
 - 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.



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