

Automotive sector report 2014



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This global sector report contains the main results of the Randstad Award 2014 research for the Automotive sector across all surveyed countries. For the full report, please visit www.randstad.com/award.



1 background and survey design

A company's success hinges on the quality of its employees, and in today's highly competitive job market, employer branding is a crucial tool for attracting and retaining the right kind of talent. A strong employer brand image raises your visibility in the job market and makes you stand out from the competition, helping you to recruit highly skilled and promising new employees. It also encourages existing employees to identify with your company, enhancing their motivation, engagement – and productivity. In order to strengthen your employer brand, however, you need to have insight into how your organization and your sector are perceived by potential employees and the public at large. In addition, you need to understand the general preferences and priorities of jobseekers in your sector and country.

the Randstad Award

The Randstad Award was created to provide employers with precisely these kinds of insights. Started in Belgium in 2000, the Randstad Award has grown into the world's largest survey into employer branding, capturing the views of some 200,000

people. In each of the 23 participating countries across Europe, Asia/Pacific and the Americas, a representative sample of employees and job seekers between the ages of 18 and 65 are asked (online) about their perceptions of their country's largest companies.¹

Randstad Award – key facts



Australia China Hungary Luxembourg Russia Switzerland
Argentina France India Netherlands Singapore UK
Belgium Germany Italy New Zealand Spain USA
Canada Hong Kong Japan Poland Sweden

note: Luxembourg is not included in global data; local reports are available

- 23 countries participating in 2014, covering 75% of the global economy
- representative sample aged 18 to 65 based on region, age and sex – slightly biased towards respondents aged under 40, potential workers being the target audience of the survey
- sample comprised of students, employed and unemployed workforce
- interviews conducted online between September 6 and December 30, 2013

¹ Participating countries: Argentina, Australia, Belgium, Canada, China, France, Germany, Hong Kong, Hungary, India, Italy, Japan, Luxembourg, the Netherlands, New Zealand, Poland, Russia, Singapore, Spain, Sweden, Switzerland, the UK and the USA.

definitions

In this study, a number of terms are used that may require some explanation.

name awareness

The respondents are asked to identify the companies they recognize, that is, those they know enough about to have an opinion about them. The result is a measure of what we call 'name awareness'.

attractiveness

Respondents are then asked whether or not they would like to work for those companies that they know. They then evaluate the relative attractiveness of each of the selected companies and sectors based on 10 key factors, including financial health, long-term job security, good work/life balance, and interesting job content. Unlike similar surveys, HR officers, staff members or experts are not invited to take part, which guarantees maximum independence and objectivity.

The survey makes a clear distinction between 'absolute attractiveness' and 'relative attractiveness'. A smaller, lesser-known company may actually be a more appealing potential employer than a larger, well-known company – but based on absolute attractiveness, the high-profile organization would rank better in the ratings due to greater public awareness. To make sure that a small company's ranking is not impacted adversely by its brand awareness, the Randstad Award distinguishes between absolute attractiveness (among all respondents) and relative attractiveness (among respondents who know the company). By applying this methodology uniformly across all countries, we are able to draw useful comparisons between companies, sectors and countries.

types of respondents

Participants in the survey are divided into 'global respondents', 'sector employees' and 'sector advocates', based on the intimacy of their relationship with the sector under analysis. Global respondents are people who are employed in any sector (they are sometimes referred to as 'all respondents'. Most of them will be working in a sector other than the one being assessed. As a group they therefore have a relatively objective view of the sector. Sector employees, as the name

suggests, are, however, themselves employed in the sector. They know its good points – and its bad points. Sector advocates, finally, are people who are not employed in the sector but would like to work for one or more companies in the sector. Their responses are often more 'extreme' or lack the nuance that sector employees demonstrate.

Automotive sector (global)

This global sector report contains the main results for the Automotive sector across all surveyed countries. The main results across all sectors per country, including the Randstad Award winner for each country, can be found in the publicly available general report. Company reports, which detail the strengths and weaknesses of individual companies and provide an excellent industry benchmark, are available to the companies being surveyed. Together, these reports convey vital information on employer branding and job seeker preferences that can help employers worldwide to strengthen their employer brand image and attract and retain the people they want.

the sample

The total sample used in evaluating the Automotive sector consisted of almost 200,000 people (global respondents), approximately half of whom were men and half women. In terms of age, the sample contained a majority of people in the 25-44 year age range (56%). This reflects the preponderance in the intermediate group of people in work. Indeed, the proportions of the other two groups (18-24 years: 14%; and 45-65 years: 30%) may be said to reflect the proportions in the working population in many countries.

description of online respondents

	global all respondents	Automotive employees ⁽¹⁾	Automotive advocates ⁽²⁾
overall	195,018	2,846	73,812
gender			
men	90,771 47%	2,028 71%	39,305 53%
women	104,247 53%	818 29%	34,507 47%
age			
18-24 years	26,457 14%	306 11%	9,240 13%
25-44 years	109,413 56%	1,844 65%	42,890 58%
45-65 years	59,148 30%	696 24%	21,682 29%
education			
primary/secondary education	70,747 36%	1,231 43%	23,044 31%
further education (bachelor)	59,178 30%	758 27%	21,980 30%
university (master) and higher	63,516 33%	832 29%	27,971 38%

⁽¹⁾ respondents currently working in the Automotive sector

⁽²⁾ respondents who would like to work in one or more companies in the Automotive sector

2 overall results

employees in all sectors

Employees from all sectors were asked what the most important criterion when choosing an employer was, for them. They were asked to choose from a list of functional attributes, including tangible factors, such as salary & benefits, long-term job security, good training and career opportunities, as well as more abstract criteria, such as a pleasant working atmosphere, strong image/strong values, and good work/life balance. Practical factors, such as convenient location, flexible working and diversity management, were also included in the list.

2.1. what are the most important attributes when choosing an employer?

global respondents

Some 23% of global respondents said that salary & employee benefits were the most important factor, and 14% chose long-term job security. These were followed (at 9%) by a pleasant working atmosphere and interesting job content. When people were asked to name their top five criteria when choosing an employer, a more nuanced picture emerges, especially when we compare the findings with those of last year. For example, 'salary & benefits' have become even more important to people than last year (rising from 59% to 67%) – which is hardly surprising, perhaps, given the economic situation of the past few years.

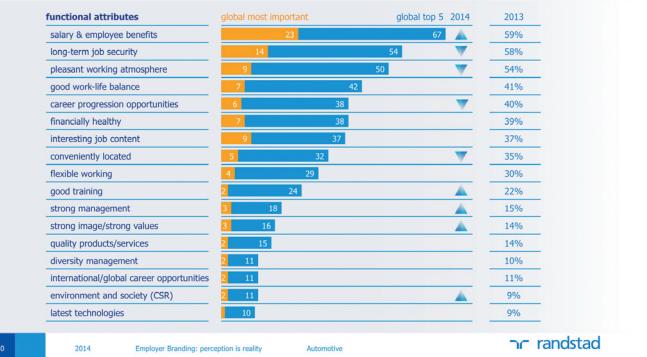
Simultaneously, the importance of long-term job security, though still considerable at 54%, has fallen from 58% last year. The importance of a pleasant working atmosphere, which was valued at 54% in 2013, has fallen to 50%. It would seem as if people are fixing their hope on money, and valuing other factors less highly. On the other hand, interest in good training, strong management and strong image/values has risen slightly since last year, as has attention to the environment and society.

Automotive employees and Automotive advocates

When Automotive employees were asked which functional attribute they look for most in a job, they were like the global respondents in that they particularly valued 'salary & employee benefits'. At 64%, however, this interest in salary and benefits was slightly lower than average. The second most

salary globally viewed as the most important functional attribute and most often selected in respondents' top 5

what is the most important criterion to you when choosing an employer?
what is your top 5 of most important criteria when choosing an employer?



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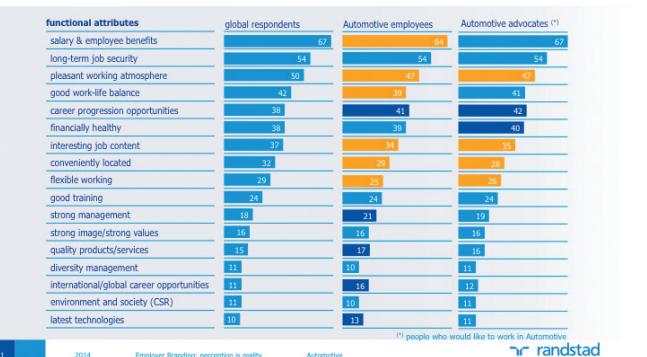
2014 Employer Branding: perception is reality

Automotive

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strong management, quality and latest technologies highly valued by Automotive employees, (international) career prospects by both employees and advocates of the sector

what is your top 5 of most important criteria when choosing an employer?



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2014 Employer Branding: perception is reality

Automotive

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popular attribute among Automotive employees was 'long-term job security' (54%). In that respect, they are precisely in line with general trend towards a greater concern for financial security. As if to counteract this emphasis on salary and security, employees in the Automotive sector, like global respondents, mention, as their third most important attribute in a job, 'a pleasant working atmosphere'. However, at 47%, both Automotive employees and Automotive advocates are less interested in this attribute than global respondents (50%).

career opportunities important

Automotive advocates showed considerably more than average interest in career progression

opportunities (42% vs. average 38%). Interestingly, both Automotive employees and Automotive advocates were not unduly interested in interesting job content, nor were practical matters, such as convenient location or flexible working hours. What Automotive employees, however, do find attractive attributes are strong management, quality products and services, international career opportunities and innovative technologies. Automotive advocates, perhaps, surprisingly, seem to show only an average interest in these attributes.

2.2. what personality traits do potential employees look for in an employer?

This year's survey asked respondents what personality traits would they would like to have in an employer.

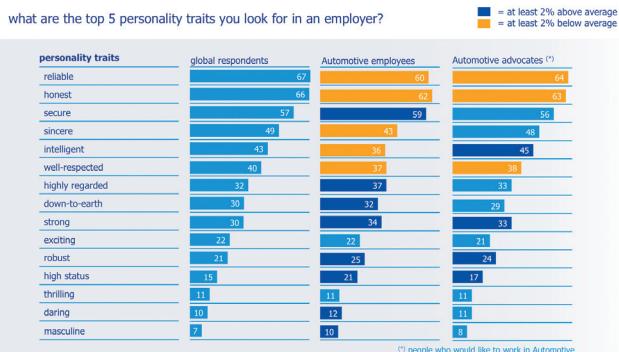


Global respondents said they particularly look for the traits of 'reliable' (67%) and 'honest' (66%) and to a slightly lesser extent for 'secure' (57%), followed by 'sincere' (49%). Although Automotive employees also mention these traits as desirable, they attach considerably less importance to 'reliable' (60%) and 'honest' (62%) than average, but more than average in the case of 'secure' (59%). Automotive advocates' responses are slightly more in line with those of global respondents, but also lag behind on 'reliable' (64%) and 'honest' (63%).

Automotive employees are not particularly attracted by the traits 'sincere', 'intelligent' and 'well-respected'. Automotive advocates, however, clearly hope and expect to find intelligence in their potential automotive employer, with an above-average ranking of 45% (compared to an average of 43%), as opposed to a low 36% ranking by Automotive employees.

Other traits that particularly appeal to Automotive employees and, to a lesser extent, advocates can perhaps be summed as, to a greater or lesser degree, 'macho'. These are 'strong', 'robust', 'down to earth', 'daring' and 'masculine' and 'highly regarded' (i.e., high status).

strength and high status highly valued by Automotive employees and advocates; the latter more often seek intelligence in an employer



3 automotive sector results

sector attractiveness

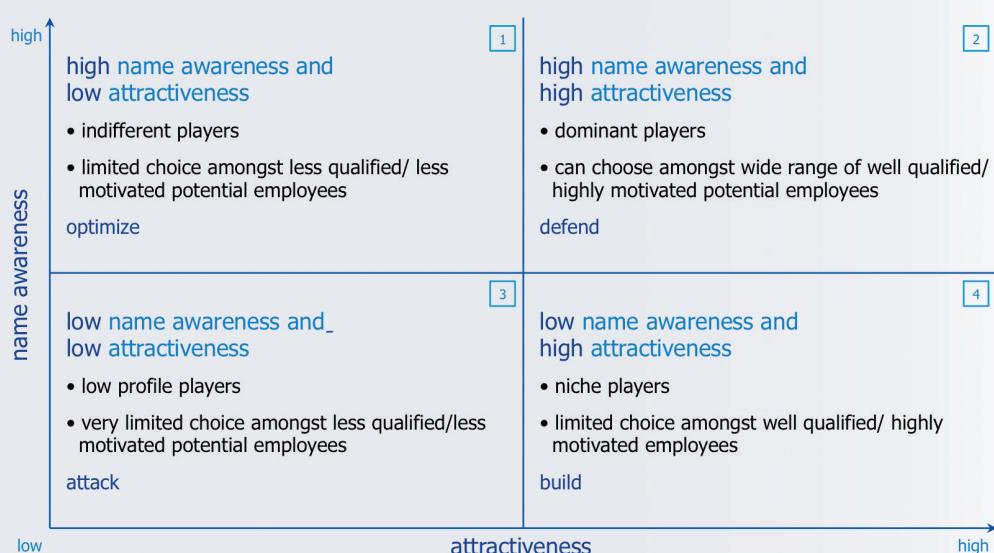
When assessing the attractiveness of a sector, it is important to factor in that a sector that contains companies with a lower public profile could be at a disadvantage compared to sectors that feature large companies with higher name recognition. So, to create a level playing field, the Randstad Award collects information on both the absolute attractiveness of a sector (the number of total respondents who indicate they would like to work for the organizations within that sector), and overall brand awareness (the number of people who know the company well enough to have an opinion about it).

Putting these two types of information together gives the key metric of the Randstad Awards, 'relative attractiveness' – that is, the proportion of people who know a company and who would actually like to work for it. This metric eliminates the advantage well-known organizations could have over lesser-known ones.

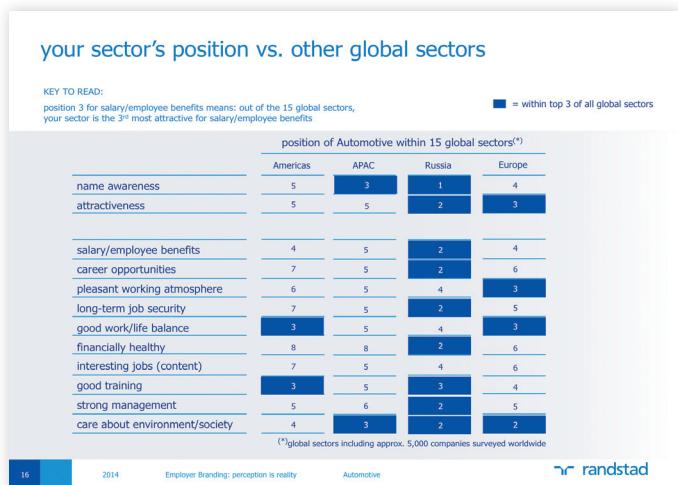
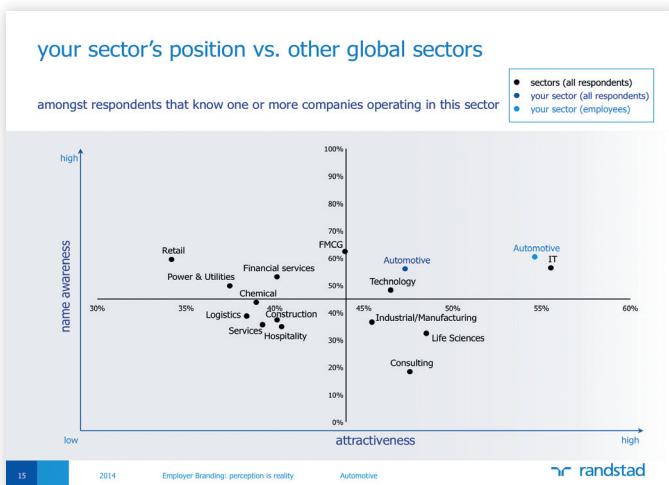
This section compares the name awareness, relative attractiveness and overall attractiveness of sectors in various countries based on the following grid:

Randstad Award attractiveness grid

attractiveness by name awareness



The best employer/sector position is Quartile 2, which combines high name awareness with high relative attractiveness. Quartile 4 also indicates high relative attractiveness, but lower name awareness (and thus access to the best of a more limited pool of employees). Quartile 1 represents well-known but not particularly desirable companies/sectors, while Quartile 3 is the most disadvantaged: both little known and little desired by those that do know them.



3.1 how attractive is the Automotive sector compared to other sectors?

Automotive employees said they found their sector very attractive to work in. Global respondents, though less enthusiastic, still rank it high in attractiveness, after IT and Life Sciences, and on a par with Consulting. In terms of name awareness, however, Automotive is below FMCG and Retail and on a par with IT. Nonetheless, Automotive is still located safely within Quartile 2, the best quartile (top right).

Global respondents rank Automotive well behind IT, but just ahead of Technology. However, other sectors that potentially compete with Automotive for talent (such as Industrial/Manufacturing, Life Sciences and Consultancy), all suffer from poor name awareness. Automotive, in attractiveness, is certainly far ahead of many other sectors (such as Retail, Power & Utilities, Financial Services and Hospitality).

how does Automotive compare with other sectors?

The survey also shows how Automotive compares to other global sectors (15 global sectors, including approx. 5,000 companies surveyed worldwide). These sectors are examined in the context of a given region: the Americas, Asia-Pacific (APAC), Russia and Europe. The survey then determines, first, how Automotive ranks for name awareness and attractiveness, and second, how it compares with other sectors regarding functional attributes (e.g., salary & benefits, good training, and so on).

name awareness and attractiveness

For name awareness, Automotive ranks best in Russia, taking the #1 position. Surprisingly, perhaps, the sector does not do well in either the Americas or Europe, which come no further than the #5 and #4 positions respectively. APAC (#3) occupies a position well behind Russia, but ahead of Europe and the Americas. In terms of attractiveness, Automotive also does well in Russia (#2); while in Europe it is slightly less attractive (#3), and again lagging in Americas and in APAC, where it is the fifth most attractive sector. Summing up, this would suggest that Automotive is most highly regarded in Russia, while there is clearly a need for the sector in the Americas to increase its name awareness and its appeal to a broad audience if it is to attract superior talent in the global talent market.

functional attributes

The survey also explores how the Automotive sector compares with other global sectors in the various regions with regard to the various functional attributes reviewed in this survey (i.e., salary & employee benefits, career opportunities, pleasant working atmosphere, long-term job security, good work/life balance, financially healthy, interesting job content, good training, strong management and care about the environment and society).

the Americas and Europe

With respect to these functional attributes, Automotive enjoys a modest reputation in the Americas and Europe. The sector is ranked as fifth most attractive sector overall. Scores on individual attributes vary. The sector is seen in the Americas as offering a good work/life balance and good training. It is rated especially low on its financial health and, to a lesser degree, lack of long-term job security, career prospects and interesting job content. In Europe, the sector is slightly better-positioned, scoring well on pleasant working atmosphere, good work/life balance and – especially – care for the environment and society.



APAC

In APAC, the Automotive sector is seen as lacking financial health, and otherwise scores relatively low (#5) across the board (within 15 global sectors). However, it is considered to be slightly better in caring for the environment.

Russia

In Russia, Automotive is thought to provide good salary/employee benefits, career opportunities, long-term job security, financial health, and care for the environment and society (on all of which the sector ranks #2). If the sector could create a more pleasant working atmosphere and a good work/life balance or interesting job content (where it scores position #3 or – in most cases – #4), it could boost its already good image still further.

how does the Automotive sector appeal to various subgroups?

We now turn to examine how the Automotive sector appeals to various subgroups: men and women, age groups, educational levels, and regions. Appeal or attractiveness was determined from respondents' answer to the question, 'Would you like to work for this Automotive company?' compared to the average rating of 47%.

gender

With regard to gender, the Automotive sector is much more attractive to men than to women (51% men versus 44% women).

age

Automotive is equally attractive as a sector to work in for 18-to-24-year-olds and for 25-to-44-year-olds (both 2% above average). It is least attractive to 45-to-65-year-olds (3% below average).

educational level

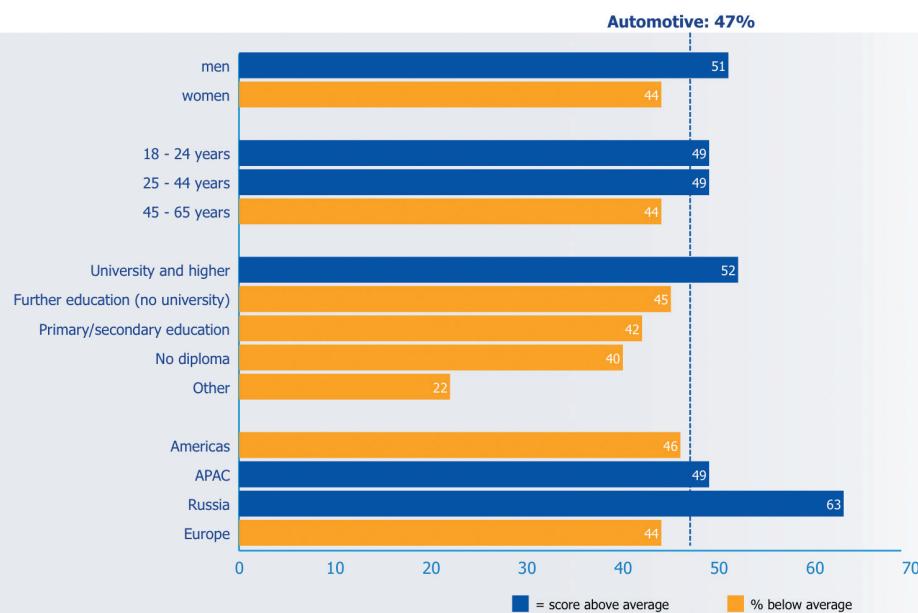
As a sector, the Automotive sector is most attractive to those with a postgraduate university degree or other form of higher education (5% above average). All other educational levels tend to be less interested in working in the sector.

location

People in Russia find the idea of working in the Automotive sector very attractive (15% above average). Those in APAC say they would also like to work in the Automotive sector (5% above average), though less so than people in Russia. In the Americas, a job in Automotive is slightly less attractive (1% below average), while Europeans, as a whole, do not particularly yearn for a job in the sector (3% below average).

your sector's attractiveness amongst subgroups

would you like to work for this company (in sector Automotive)?



3.2 how attractive is the Automotive sector in the various countries?

We now review what the survey tells us about how popular the Automotive sector is in various countries around the world.

Argentina

Respondents who know one or more companies operating in the Automotive sector in Argentina say that Automotive is one of the most attractive sectors in this country, but place it behind Technology and IT, and on a par with Life Sciences. Its name awareness, however, is high – more or less equal to Financial Services, Retail and FMCG. This gives Automotive a head start over IT and more especially Life Sciences, whose profile in Argentina is apparently low. Automotive employees rank their own sector as more attractive than do people from other sectors. They also somewhat overestimate its name awareness among the general public. The sector is well placed in Quartile 2.

Australia

By employees in the Automotive sector in Australia, the sector is seen as highly attractive. But people working in other sectors rank it as much less attractive – putting it after Technology, IT, Consulting, Life Sciences and FMCG, certainly in terms of attractiveness. In terms of name awareness, however, Automotive is ranked highly, along with Financial Services and Retail. The sector is well placed in Quartile 2.

Belgium

Automotive employees in Belgium rank their sector very highly in terms of attractiveness – far ahead of its closest rivals, IT and Life Sciences. They also assign it a high level of name awareness, on a par with Hospitality, Retail and Financial Services. This would place the sector well within Quartile 2, the best quartile. However, employees in other sectors take a different view. They place it in Quartile 1, close to Quartile 3, the worst sector. They rank both its name awareness and its attractiveness relatively low.

Canada

Automotive employees in Canada rank Automotive as the most attractive sector by far, with a name awareness score that is better than all sectors other than FMCG. However, this exceptional rating is not shared by workers in other sectors. They place it fourth in attractiveness: after IT, Life Sciences and Technology, but ahead of Consulting and FMCG. In terms of name awareness, they rank it after FMCG,



but more or less on a level with IT, Technology and Power & Utilities and well above Life Sciences and Consulting. Unusually, Automotive in Canada is ranked well above the Retail sector. All in all, this rating is enough to keep the sector in Quartile 2, the best quartile.

China

In China, employees working in Automotive have a realistic picture of their sector, corresponding closely to the view of workers in other sectors, both in terms of attractiveness and name awareness. The sector is on a par with Construction as far as attractiveness is concerned, and lagging behind Consulting, Financial Services, Life Sciences, Power & Utilities and Technology. However, with the exception of FMCG, IT and Financial Services, the Automotive sector generally enjoys better name awareness than its nearest rivals, and much better than Consulting.

France

In France, Automotive employees have a grossly inflated view of their sector's attractiveness and name awareness. They position it safely within Quartile 2, the best cell in the grid. However, more objectively, employees in other sectors place it in Quartile 1. They position Automotive closest to Power & Utilities, slightly lower in attractiveness but at the same level of name awareness. While many other sectors – such as Technology, Services, Chemical, Consulting, IT, FMCG and Life Sciences – are seen as being more attractive than Automotive, they are, with the exception of Power & Utilities, Financial Services and Retail, also seen as having lower name awareness.

Germany

Automotive employees in Germany are pleased with the position of their sector, ranking it the most attractive of any sector by far, and enjoying good name awareness (though less than IT, FMCG and

Retail). Respondents in other sectors, however, are less enthusiastic about Automotive. They position Automotive close to Technology and rank IT higher in terms of both attractiveness and name awareness. They also see Automotive as less attractive than Consulting, but the latter has such low name awareness that it is perhaps unlikely to form a serious competitor.

Hong Kong

Automotive employees in Hong Kong believe the sector is attractive, but has only modest name awareness. However, those working in other sectors see Automotive, in terms of attractiveness, as trailing a long way behind IT (the best-positioned sector in Hong Kong) and, to a lesser extent, also behind Life Sciences and Technology. Automotive and IT are the only two sectors positioned clearly within Quartile 2 in Hong Kong.

Hungary

Automotive sector employees in Hungary are content with their sector's position, giving it the highest ranking in terms of attractiveness and putting its name awareness on a par with Chemical and (more or less) FMCG. But people working in other sectors rate the Automotive sector in Hungary slightly less highly on both counts. However, they still see it as an attractive sector, ranking just behind IT and slightly ahead of Technology. The name awareness of these three is more or less comparable, with Automotive a fraction better. They form a trio that is well out in front. Those with the next best attractiveness ranking are Life Sciences and Consulting, but both have very poor name awareness.

India

Those who work in the Automotive sector in India are very pleased with their sector, rating it as the most attractive sector and the one with the best name awareness. People working in other sectors consider it to be relatively well known – on a par with IT and Financial Services. But they do not consider it to be the most attractive sector, placing it after Technology, Consulting and IT, which, as often, takes the lead. The Automotive sector is well placed in Quartile 2.

Italy

The Automotive sector in Italy is well thought of by employees in the sector and it is also well positioned by those working in other sectors. IT and Technology would seem to be Automotive's closest rivals in the hunt for talent, but the fact that

Technology is perceived to be considerably less attractive than IT and has considerably lower name awareness means that it is at a disadvantage. The Automotive sector is well placed in Quartile 2 in Italy.

Japan

People working in Automotive in Japan rate the sector highly, with good name awareness and attractiveness. But a threat to Automotive talent recruiters is posed by both IT and FMCG. They are seen as the best two sectors to work in. What is more, IT, FMCG and Retail enjoy the same level of name awareness, slightly better than that of Automotive. With respect to other potential competitors to Automotive talent (namely, Life Sciences, Consulting and Technology), although they are all considered to be more attractive than Automotive, they suffer from relatively poor name awareness. The Automotive sector in Japan is still placed in Quartile 2.

The Netherlands

Those working in the Automotive sector in the Netherlands rank the sector very highly indeed – perhaps unrealistically so. Those working in other sectors also rate Automotive highly in name awareness – above FMCG, only slightly below Retail and on a par with Financial Services. However, Automotive is ranked lower in attractiveness, behind leaders IT and Technology and (only slightly behind) FMCG. However, other potential rival sectors for talent (e.g., Life Sciences and Chemical) are generally felt to be less attractive (even if only slightly) than Automotive, which is also burdened with lower name awareness. Consulting, which is positioned in Quartile 1, is not a serious competitor for talent, on account of its relatively low attractiveness and poor name awareness compared to Automotive. The Automotive sector is well placed in Quartile 2.

New Zealand

Automotive employees in New Zealand position their own sector very highly (again, perhaps, unrealistically), particularly in terms of attractiveness. Workers in other sectors agree that the Automotive sector enjoys excellent name awareness (higher, even, than Retail), but tend to find Technology more attractive to work in, or otherwise IT, which they place more or less on a par with the Automotive sector. Automotive is positioned safely within Quartile 2, the best sector. Other sectors that approach Automotive in terms of attractiveness are FMCG, Consulting and Life Sciences, though all three suffer from lower name awareness. The Automotive sector is well placed in Quartile 2 in New Zealand.



Poland

Automotive employees in Poland are content with their sector, ranking it highest in terms of attractiveness and one of the highest in name awareness (behind Services and on the same level as Financial Services). The judgment of employees working in other sectors is slightly muted, but essentially the same. The sector is ranked after IT and Technology in attractiveness, but is better than both in terms of name awareness. Life Sciences and Consulting are only slightly less popular, but suffer from poorer name awareness. With respect to attractiveness, these sectors leave the rest trailing a considerable distance behind them. The Automotive sector is well placed in Quartile 2 in Poland.

Russia

Automotive sector employees in Russia rank their own sector relatively highly, in terms of both attractiveness and name awareness. Although this view is not entirely shared by workers in other sectors, who believe Technology is slightly more attractive than Automotive, they do acknowledge the sector's top position in terms of name awareness: its closest rivals in this respect are Financial Services, Retail, Technology and Power & Utilities. Close in terms of attractiveness is Power & Utilities and – although it suffers from poor name awareness – Consulting. IT follows at a considerable distance. The Automotive sector is well placed in Quartile 2 in Russia.

Singapore

Those working in the Automotive sector in Singapore experience their sector as highly attractive (more so than all others), but see it as having only medium name awareness – much lower than IT, and also below or on a par with Power & Utilities, FMCG, and Financial Services. Employees in other sectors, however, rank Automotive's name awareness more optimistically. In terms of attractiveness, they place the sector after IT and Life Sciences: of these two, Life Sciences clearly suffers from poor name awareness. Automotive is also placed just after Hospitality in terms of attractiveness, but benefits from much higher name awareness. These results are sufficient to place the Automotive sector in Quartile 2 in Singapore.

Spain

Automotive employees in Spain rate their sector highly, but relatively realistically, especially as far as

name awareness is concerned. Workers in other sectors put Automotive far behind the IT sector in terms of attractiveness, but slightly ahead of it in terms of name awareness. The other sector that could be said to compete with Automotive is Technology. Its name awareness is not high, but its ranking on both axes is sufficient to locate it safely in the best quartile, Quartile 2. Life Sciences is, in principle, perceived as an attractive sector in Spain (slightly more attractive than Technology), but its name awareness is poor. The Automotive sector is well placed in Quartile 2 in Spain.

Sweden

Those working in the Automotive sector in Sweden rank it as the most attractive sector, and give it a name awareness that is even higher than that of Retail. This optimistic view is not fully shared by workers in other sectors. They certainly acknowledge that Automotive is an attractive sector, but rank it behind Technology, and just ahead of Consulting and Life Sciences, both of which, however, have much lower name awareness. Employees in other sectors rank Automotive on a par with Retail as far as name awareness is concerned. These ratings mean that Automotive is located well within the best quartile, Quartile 2.

Switzerland

Automotive employees in Switzerland are content, positioning their sector as the most attractive, and as having reasonable name awareness. However, global respondents take a more nuanced view of the sector. They see Automotive as a lot less attractive than IT (which is essentially the all-round



best sector in Switzerland), and somewhat less than Technology, Life Sciences, Industrial/Manufacturing and Hospitality (in ascending order of attractiveness). However, the last three sectors are perceived as suffering from poor name awareness. FMCG is seen as slightly less attractive and with poorer name awareness than Automotive. The Automotive sector is well placed in Quartile 2 in Switzerland.

UK

Automotive employees in the UK paint a realistic picture of the sector's name awareness, but have an inflated vision of its attractiveness. Others place it well behind IT in terms of attractiveness, and on a par with Technology, which, however, has lower name awareness. Industrial/Manufacturing, Life Sciences and, to a lesser extent, Consulting, are all slightly less attractive than Automotive, and have much lower name awareness. Automotive is located well within Quartile 2.

USA

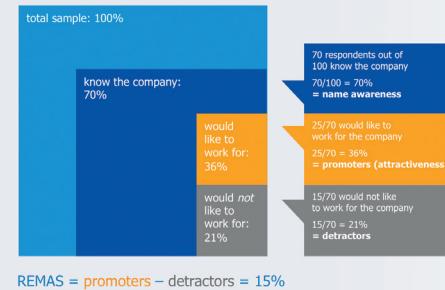
Automotive employees in the USA have a high opinion of their sector in terms of attractiveness, and a realistic perception of its name awareness. Employees in other sectors, however, see a less rosy picture. They rank many sectors as being more attractive than Automotive. IT is the most attractive sector by far, followed, at a distance, by Construction, Life Sciences, Industrial/Manufacturing, Technology and Consulting. Still, all of these (with the exception of Technology) have low to very low name awareness. The Automotive sector is still well placed in Quartile 2 in the USA.

3.3 REMAS, an alternative parameter for measuring company attractiveness

This year, Randstad is introducing a new way of measuring and comparing an employer's attractiveness score: the Randstad Employer Attractiveness Score (REMAS, for short). This metric makes it easy to benchmark the performance of different employers or sectors.

Randstad Award - concept

Randstad Employer Attractiveness Score (REMAS)



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2014

Employer Branding: perception is reality

Automotive

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how does the REMAS work?

The REMAS is an adaptation of the concept of Reichfield's Net Promoter Score specifically to the needs of employer branding. People who know a sector or company are asked whether or not they would like to work for that company or sector. The REMAS is calculated by taking the percentage of those that would like to work in the given sector or company (the 'promoters') and then subtracting the percentage that would not like to do so (the 'detractors').

your sector's REMAS vs. other global sectors

amongst respondents who know one or more companies within the sector; the percentage that would like to work for the company minus the percentage that would not

	promoters	detractors	REMAS
1. IT	56%	17%	39%
2. Life Sciences	49%	18%	30%
3. Automotive	47%	20%	27%
4. Technology	47%	20%	27%
5. Consulting	48%	22%	26%
6. Industrial/Manufacturing	45%	21%	25%
7. FMCG	44%	24%	20%
8. Construction	40%	24%	16%
9. Services	39%	28%	12%
10. Hospitality	40%	29%	12%
11. Financial services	40%	29%	11%
12. Chemical	39%	28%	11%
13. Logistics	38%	28%	11%
14. Power & Utilities	37%	30%	7%
15. Retail	34%	32%	2%

(* based on company attractiveness)

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The table shows how, by using the REMAS, one can quickly see how the Automotive sector (for instance) measures up against other sectors in terms of employer attractiveness. With a score of 27%, Automotive is ranked #3.

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4.1. most attractive sectors

This section analyses which sectors are considered most attractive:

- by respondent group
- within subgroups
- by attribute

top 10 most attractive sectors by respondent group

We now turn to consider how the sectors compare in attractiveness, as determined by their REMAS, per respondent group (global respondents, Automotive employees and Automotive advocates).

Attractiveness in this context is defined as the percentage of people who know one or more companies operating in a given sector and would like to work for a company in that sector.

top 10 most attractive sectors by respondent group

attractiveness: amongst respondents who know one or more companies operating in a particular sector; percentage who would like to work for the companies within the sectors

global respondents		AUTOMOTIVE employees		AUTOMOTIVE advocates	
1.	IT	56%	1.	Automotive	55%
2.	Life Sciences	49%	2.	IT	52%
3.	Consulting	48%	3.	Technology	47%
4.	Automotive	47%	4.	Industrial-Manufacturing	46%
5.	Technology	47%	5.	Life Sciences	45%
6.	Industrial-Manufacturing	45%	6.	Consulting	43%
7.	FMCG	44%	7.	FMCG	40%
8.	Hospitality	40%	8.	Construction	40%
9.	Construction	40%	9.	Power & Utilities	39%
10.	Financial services	40%	10.	Financial services	39%

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how people in other sectors see Automotive

Global respondents (those who do not work in the Automotive sector but who know one or more companies operating in it) give the Automotive sector a REMAS of 47%, placing it in #4 position, after the #1, IT (56%), followed by Life Sciences (49%) and Consulting (48%) respectively.

how those currently working in Automotive see their sector

Automotive employees, as expected, place Automotive at the top (with a REMAS of 55%).

They place IT and Technology as #2 (52%) and #3 (47%) respectively.

how those wanting to work in Automotive see the sector

Automotive advocates, again not surprisingly, also give Automotive the highest score (75%), with again IT and Technology coming in at #2 (69%) and #3 (64%) respectively.

how subgroups rank sectors as most attractive

Given that all respondents ranked IT as most attractive, it is interesting to see what we can learn from which sectors the various subgroups rank as second and third.

most attractive sector within subgroups viewed by all respondents

	1 st position	2 nd position	3 rd position
overall	IT	Life sciences	Consulting
men	IT	Automotive	Technology
women	IT	Life sciences	Consulting
18-24 years	IT	Consulting	Technology
25-44 years	IT	Life Sciences	Consulting
45-65 years	IT	Life Sciences	Automotive
primary/secondary education	IT	Technology	Automotive
further education (bachelor)	IT	Life Sciences	Technology
university (master) and higher	IT	Consulting	Life Sciences

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overall

Workers in all sectors place Life Sciences and Consulting as #2 and #3 respectively.

gender

Men gave second and third places to Automotive and Technology, while women went for Life Sciences and Consulting.

age

The younger age group (18-24) assigns Consulting and Technology second and third place, while the older age group (45-65) gave second place to Life Sciences followed by Automotive. The intermediate age group (25-44) gave Life Sciences second place, and Consulting third place.

educational level

Respondents with the highest educational levels (postgraduate: Master's or Ph.D.) also give Consulting and Life Sciences second and third place. The intermediate educational group ranked Life Sciences and Technology #2 and #3 respectively.

affinities

These preferences and assessments across the various subgroups not only indicate respondents' perceptions of the degree to which they like working (or would like to work) in a given sector, but also give an indication of affinities. For example, the results suggest that the Automotive sector may appeal more strongly to older men and lower educational levels; that Technology appeals to younger men, with an intermediate level of education; that Consulting appeals mainly to women and young-to-intermediate age groups; and that Life Sciences appeals to those of an intermediate age group with a medium-to-high level of education. Though such interpretations are only ever likely to be indicative, they may be useful in directing recruitment efforts towards people who have an affinity, natural or acquired, with a particular sector.

Automotive employees and Automotive advocates

Automotive employees in general see their own sector as the most attractive sector. This view is shared unanimously by the Automotive advocates. However, there are one or two deviations from this pattern among employees. Women working in the

most attractive sector within subgroups viewed by Automotive advocates

	1 st position	2 nd position	3 rd position
overall	Automotive	IT	Technology
men	Automotive	IT	Technology
women	Automotive	IT	Life Sciences
18-24 years	Automotive	IT	Technology
25-44 years	Automotive	IT	Technology
45-65 years	Automotive	IT	Technology
primary/secondary education	Automotive	IT	Technology
further education (bachelor)	Automotive	IT	Technology
university (master) and higher	Automotive	IT	Technology

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Automotive sector, for instance, place Construction in first place, followed by IT and Industrial/Manufacturing. This may suggest a lack of commitment and engagement in the Automotive sector on the part of female employees.

Interestingly, the younger age group gave preference to IT over Automotive, suggesting that they may shift to IT should an opportunity occur. The 45-65 age group interestingly sees Logistics (or Hospitality) as an alternative should they need to leave the Automotive sector. Those with a higher level of education give preference to Consulting, again indicating the possibility of a move. Women employed in Automotive are prepared to venture into Life Sciences or Industrial/Manufacturing, while employees in the younger group are not averse to looking at Construction.

It seems that, on average, Automotive employees and advocates see a natural link with IT when looking for an alternative to Automotive, with Technology as a third choice.

how people rank sector attractiveness on the basis of functional attributes

Earlier in this report, we analyzed the value that global respondents, Automotive employees and Automotive advocates attach to certain functional attributes, such as salary & benefits, career opportunities, and so on. We now analyze how these ten functional attributes contribute individually to a sector's attractiveness – in the eyes of global respondents, Automotive employees and Automotive advocates.

most attractive sector within subgroups viewed by Automotive employees

	1 st position	2 nd position	3 rd position
overall	Automotive	IT	Technology
men	Automotive	IT	Technology
women	Construction	IT	Industrial-Manufacturing
18-24 years	IT	Automotive	Construction
25-44 years	Automotive	IT	Technology
45-65 years	Automotive	Logistics	Hospitality
primary/secondary education	Automotive	IT	Technology
further education (bachelor)	Automotive	Technology	IT
university (master) and higher	Consulting	Automotive	IT

Automotive

The Automotive sector often ranks as third most attractive sector. It is seen by global respondents as offering long-term job security, a good work/life balance and care for the environment and society, while Automotive employees and Automotive advocates also believe the sector offers a pleasant working atmosphere, interesting job content, strong management and good training.

IT

On the basis of all attributes, all respondents rank the IT sector first, with one notable exception: the attribute 'financially healthy', for which Life Sciences is apparently seen as providing greater security and given first ranking, with IT having to be satisfied with second position.

Consulting

Consulting is seen by all respondents, Automotive employees and Automotive advocates as providing a good salary and benefits, good training and career opportunities, strong management and interesting job content. Some see it as being financially healthy and as offering a pleasant working atmosphere.

Life Sciences

The Life Sciences sector is seen by global respondents, Automotive employees and Automotive advocates as providing a pleasant working atmosphere, long-term job security, good work/life balance, plus interesting job content and good training. The sector is also perceived as caring about the environment and society. At a secondary level, the sector is thought to offer good salary and career opportunities and strong management.

Hospitality

Interestingly, the Hospitality sector is mentioned a few times as an option, particularly as providing a pleasant working environment and financial stability.

most attractive sector by attribute viewed by all respondents

	1 st position	2 nd position	3 rd position
salary/employee benefits	IT	Consulting	Life Sciences
career opportunities	IT	Consulting	Life Sciences
pleasant working atmosphere	IT	Life Sciences	Hospitality
long-term job security	IT	Life Sciences	Automotive
good work/life balance	IT	Life Sciences	Automotive
financially healthy	Life Sciences	IT	Consulting
interesting jobs (content)	IT	Life Sciences	Consulting
good training	IT	Consulting	Life Sciences
strong management	IT	Consulting	Life Sciences
care about environment/society	IT	Life Sciences	Automotive

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most attractive sector by attribute viewed by Automotive employees

	1 st position	2 nd position	3 rd position
salary/employee benefits	IT	Life Sciences	Consulting
career opportunities	IT	Consulting	Life Sciences
pleasant working atmosphere	IT	Hospitality	Automotive
long-term job security	Automotive	IT	Life Sciences
good work/life balance	IT	Life Sciences	Automotive
financially healthy	Life Sciences	Hospitality	FMCG
interesting jobs (content)	IT	Automotive	Life Sciences
good training	IT	Life Sciences	Automotive
strong management	IT	Life Sciences	Automotive
care about environment/society	IT	Automotive	FMCG

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most attractive sector by attribute viewed by Automotive advocates

	1 st position	2 nd position	3 rd position
salary/employee benefits	IT	Consulting	Life Sciences
career opportunities	IT	Consulting	Life Sciences
pleasant working atmosphere	IT	Automotive	Life Sciences
long-term job security	Life Sciences	IT	Automotive
good work/life balance	IT	Automotive	Life Sciences
financially healthy	Life Sciences	Consulting	IT
interesting jobs (content)	IT	Automotive	Life Sciences
good training	IT	Automotive	Consulting
strong management	IT	Automotive	Life Sciences
care about environment/society	IT	Automotive	Life Sciences

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4.2. most attractive companies

This Randstad Global Automotive Report concludes with the top three most attractive companies by country. The ranking is determined on the basis of the percentage of respondents who say they would like to work for the company in question. All countries included in this ranking have a minimum of 10% name awareness. The results are as follows:

top 3 most attractive companies by country			
attractiveness: amongst respondents who know the company (minimum 10% name awareness); % that would like to work for the company			
Americas	Award winner	1st runner up	2nd runner up
Argentina	Mercedes Benz	Ford	Toyota
Canada	WestJet Airlines	Bombardier	IBM Canada
USA	Google	Amazon.com	Microsoft Corporation
APAC			
Australia	ABC	Virgin Australia	Department of Immigration & Border Protection
China	IBM	Intel	Apple
Hong Kong	Cathay Pacific	MTR	Hong Kong Dragon Airlines
India	Microsoft	Google India	Sony
Japan	Meiji Holdings	Suntory Holdings	Sony
New Zealand	TVNZ	Coca-Cola Amatil	Department of Conservation
Singapore	Singapore Airlines	Shell	Changi Airport Group
Russia	Gazprom	BMW	Rosneft

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top 3 most attractive companies by country (continued)			
attractiveness: amongst respondents who know the company (minimum 10% name awareness); % that would like to work for the company			
Europe	Award winner	1st runner up	2nd runner up
Belgium	GSK	Pfizer	Jan De Nul
France	Airbus	Dassault Aviation	Eurocopter
Germany	BMW	Daimler	Audi
Hungary	Audi	Mercedes-Benz	IBM
Italy	Thales Alenia Space	Ferrero	Feletinelli
Luxembourg	RTL Group	Groupe Enovos	Banque de Luxembourg
Netherlands	Philips	Luchthaven Schiphol	KLM
Poland	Mercedes-Benz	Toyota Motor	Samsung Electronics
Sweden	IKEA	Sveriges Television	Sveriges Radio
Switzerland	Patek Philippe	Swatch	Rolex
Spain	IBM	Nestlé	Bayer
UK	BMW	Rolls-Royce Group	John Lewis

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