

# FMCG sector report 2014



randstad award

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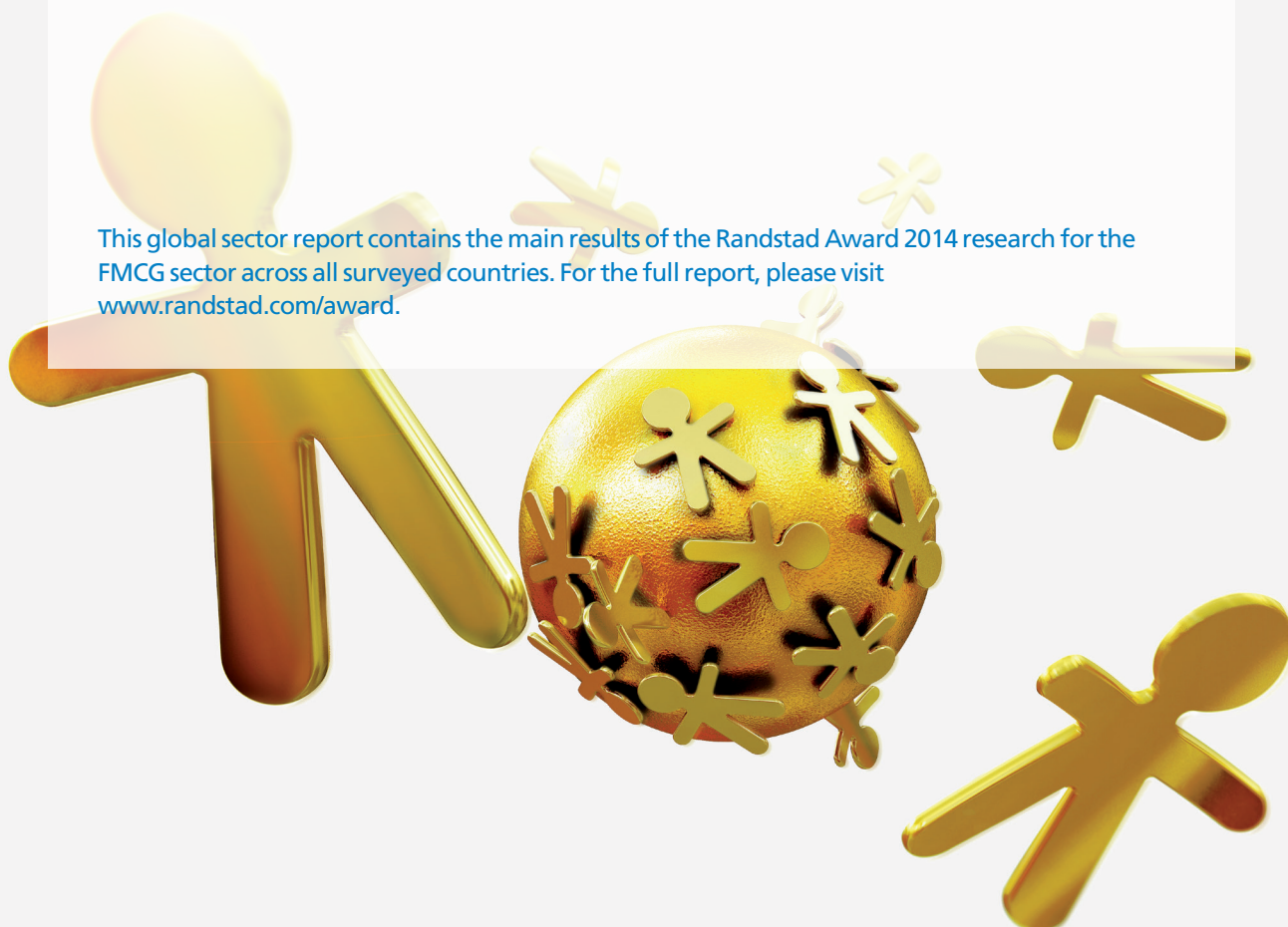




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This global sector report contains the main results of the Randstad Award 2014 research for the FMCG sector across all surveyed countries. For the full report, please visit [www.randstad.com/award](http://www.randstad.com/award).



# 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.<sup>1</sup>

## 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

<sup>1</sup> 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.

### FMCG sector (global)

This global sector report contains the main results for the FMCG 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 FMCG 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		FMCG employees <sup>(1)</sup>		FMCG advocates <sup>(2)</sup>	
overall	195,018		2,338		71,524	
gender						
men	90,771	47%	1,213	52%	32,253	45%
women	104,247	53%	1,125	48%	39,271	55%
age						
18-24 years	26,457	14%	319	14%	9,236	13%
25-44 years	109,413	56%	1,505	64%	41,935	59%
45-65 years	59,148	30%	514	22%	20,353	28%
education						
primary/secondary education	70,747	36%	903	39%	23,226	32%
further education (bachelor)	59,178	30%	648	28%	22,132	31%
university (master) and higher	63,516	33%	761	33%	25,402	36%

<sup>(1)</sup> respondents currently working in the FMCG sector

<sup>(2)</sup> respondents who would like to work in one or more companies in the FMCG sector

# 2 overall results

## employees in all sectors

Employees from all sectors were asked what they considered to be the most important criterion when choosing an employer. 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

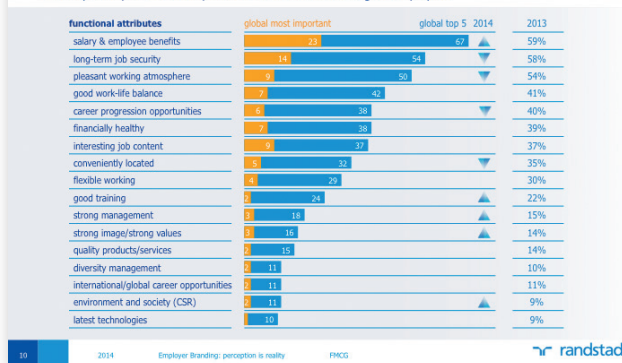
Some 23% of global respondents said that, when choosing an employer, salary & employee benefits were the most important factor, while 14% chose long-term job security. These were followed (at 9%) by a pleasant working atmosphere and interesting job content. When people were asked to name their top five 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.

#### FMCG employees and FMCG advocates

When FMCG 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

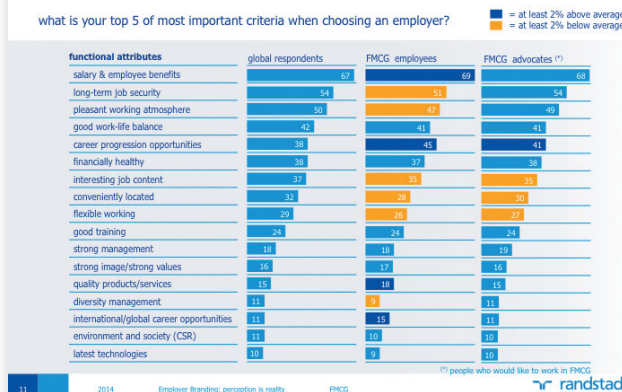
#### salary globally viewed as the most important functional attribute and most often selected in respondents' top 5

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?



#### salary, career and quality highly valued by FMCG employees, both employees and advocates less concerned with flexibility

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



69%, however, this interest in salary and benefits was higher than the global average (67%). The second most popular attribute among FMCG employees was 'long-term job security' (51%). In that respect, they are in line with the general trend towards a greater concern for financial security, though lag somewhat behind the average. As if to counteract this emphasis on salary and security, employees in the FMCG sector, like global respondents, mention 'a pleasant working atmosphere' as their third most important attribute in a job. However, at 47%, both FMCG employees (and to a lesser extent FMCG advocates) are less interested in this attribute than global respondents (50%).

### career opportunities important

FMCG employees (and to a lesser extent FMCG advocates) showed considerably more than average interest in career progression opportunities (45% for FMCG employees vs. average 38%). FMCG employees also particularly value quality products and services and international/global career opportunities. On the other hand, with 2% below average, they do not particularly seem to value good diversity management. Interestingly, both FMCG employees and FMCG advocates were not unduly concerned about having interesting job content, nor were practical matters, such as convenient location or flexible working hours.

### 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.

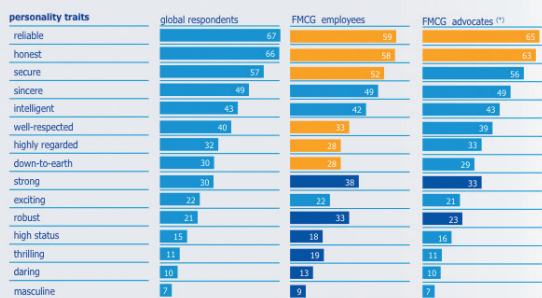


Global respondents said they particularly look for the traits of 'reliable' (67%) and 'honest' (66%) and to a slightly lesser extent for 'secure' (57%), followed by 'sincere' (49%). Although FMCG employees also mention these traits as the most desirable (and in the same order of importance), they are in general less interested in any of them, lagging considerably behind by at least five percentage points. FMCG advocates' responses are more in line with those of global respondents, but also lag behind on 'reliable' (65%) and 'honest' (63%).

### strong & robust more valued in an employer by both FMCG employees and advocates; thrill & status more valued by employees

what are the top 5 personality traits you look for in an employer?

■ = at least 2% above average  
■ = at least 2% below average



(\*) people who would like to work in FMCG

FMCG employees are not particularly attracted by the traits 'well-respected', 'highly regarded' and 'down to earth', which are rated lower than average. Both FMCG employees and advocates, however, attach great importance to strength and robustness in an employer, with employees leading the way. They rate 33% on 'robust' (compared to the global average of 21%) and 38% on 'strong' (average: 30%).

Besides 'strong' and 'robust', FMCG employees are particularly attracted by what can perhaps be summed up as, to a greater or lesser degree, 'macho'. These are 'thrilling', 'daring', 'masculine' and 'high status', to which FMCG employees give an above-average collective ranking.



# 3 FMCG 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 FMCG sector compared to other sectors?

FMCG employees said they found their sector attractive to work in, putting it in #2 position after IT. Global respondents are less enthusiastic, however, ranking it #7 in attractiveness, after IT, Life Sciences, Consulting, Automotive, Technology and Industrial/Manufacturing. This ranking puts FMCG near the borderline between Quartile 1 and Quartile 2, the best quartile (top right). This suggests that steps need to be taken to improve the sector's attractiveness. In terms of name awareness, however, FMCG is placed first, just above Retail.

### your sector's position vs. other global sectors

KEY TO READ:  
position 3 for salary/employee benefits means: out of the 15 global sectors, your sector is the 3<sup>rd</sup> most attractive for salary/employee benefits

■ = within top 3 of all global sectors

	position of FMCG within 15 global sectors <sup>(*)</sup>			
	Americas	APAC	Russia	Europe
name awareness	1	1	6	5
attractiveness	8	7	11	7
salary/employee benefits	11	8	11	9
career opportunities	10	8	9	7
pleasant working atmosphere	9	4	9	5
long-term job security	4	6	10	4
good work/life balance	6	6	10	5
financially healthy	3	7	5	2
interesting jobs (content)	12	7	12	9
good training	11	8	11	9
strong management	7	8	7	3
care about environment/society	7	6	9	5

(\*) global sectors including approx. 5,000 companies surveyed worldwide

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2014

Employer Branding: perception is reality

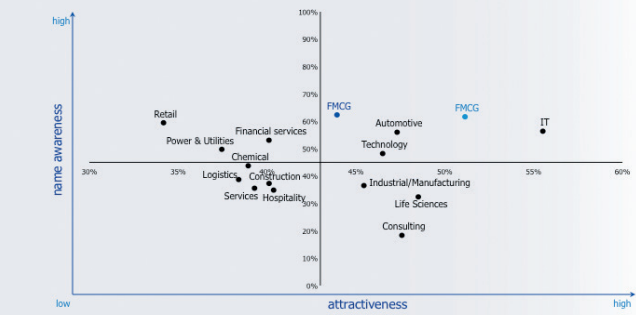
FMCG

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### your sector's position vs. other global sectors

amongst respondents that know one or more companies operating in this sector

- sectors (all respondents)
- your sector (all respondents)
- your sector (employees)



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Employer Branding: perception is reality

FMCG

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### how does FMCG compare with other global sectors?

The survey also shows how FMCG 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 FMCG 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, FMCG ranks best in the Americas and APAC, which share the #1 position. Europe comes no further than the #5 position, just ahead of Russia (#6). In terms of attractiveness, FMCG does less well, scoring particularly low in Russia (#11). Summing up, this would suggest that there is clearly a need for the sector to increase its attractiveness if it is to attract superior talent in the global talent market.

### **functional attributes**

The survey also explores how the FMCG 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**

In the Americas, the sector is seen as being financially healthy and, to a degree, providing long-term job security, but not a sector that offers good salary and benefits, interesting job content, good career opportunities or training. In Europe, as in the Americas, the sector is perceived as offering good financial stability. It is also valued for its strong management and, up to a point, its long-term job security.

### **APAC**

In APAC, the FMCG sector, though enjoying excellent name awareness, is only moderately rated for specific attributes across the board (within 15 global sectors). However, it is considered to provide a pleasant working atmosphere and, to a lesser extent, to provide job security, good work/life balance, and care for the environment.

### **Russia**

In Russia, FMCG is seen as being relatively financially healthy (#5), but otherwise it seems that the sector is not seen as very attractive, scoring particularly low on salary, training, working atmosphere, work/life balance and job content (around the #10 mark).





### how does the FMCG sector appeal to various subgroups?

We now turn to examine how the FMCG 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 FMCG company?' compared to the average rating of 44%.

#### gender

With regard to gender, the FMCG sector is slightly more attractive to women than to men (45% women versus 43% men).

#### age

The FMCG sector 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 considerably less attractive to 45-to-65-year-olds (4% below average).

#### educational level

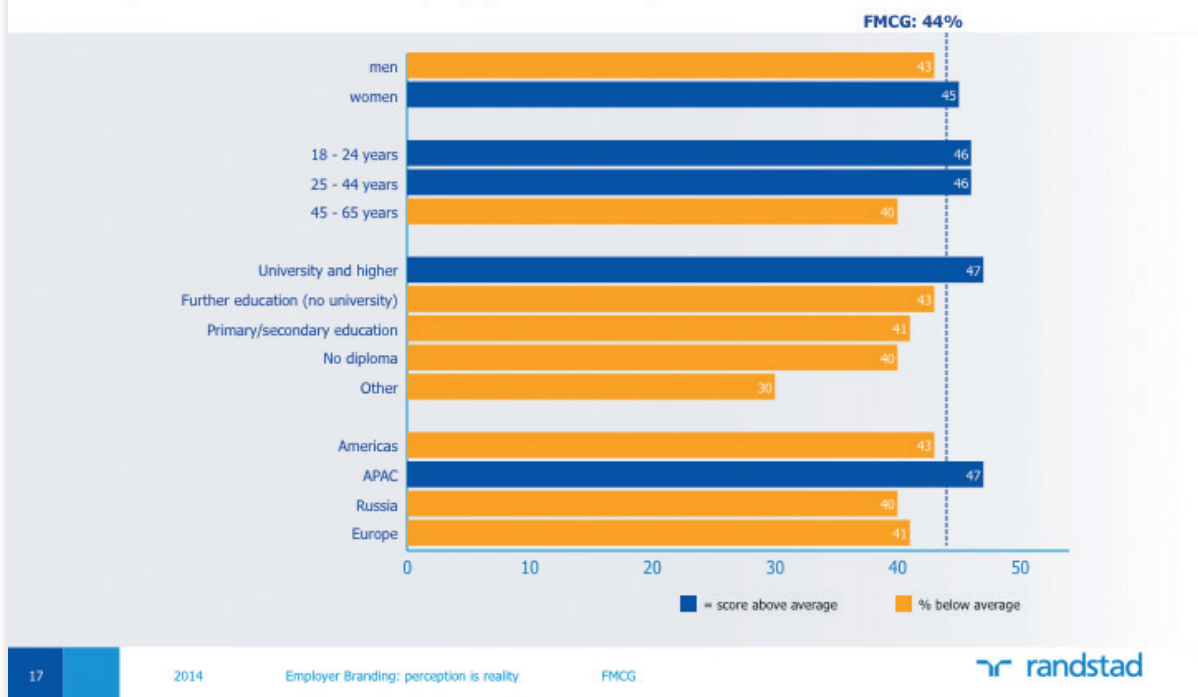
As a sector, the FMCG sector is clearly most attractive to those with a postgraduate university degree or other form of higher education (3% above average). All other educational levels tend to be less interested in working in the sector.

#### location

People in APAC find the idea of working in the FMCG sector quite attractive (3% above average). Those in the Americas are less interested (1% below average), though more than people in Europe (3% below average). The Russians show least interest in working in the FMCG sector (4% below average).

## your sector's attractiveness amongst subgroups

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



### 3.2 how attractive is the FMCG sector in the various countries?

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

#### Argentina

Respondents who know one or more companies operating in the FMCG sector in Argentina say that FMCG is a moderately attractive sector in which to work in this country, but place it behind IT, Technology, Automotive, Life Sciences, Chemical and Financial Services. However, its name awareness is good: more or less on a par with Retail, Financial Services and Automotive. FMCG employees rank their sector as more attractive than do people from other sectors. They also slightly overestimate its name awareness among the general public. FMCG falls just within Quartile 2, the best sector.

#### Australia

By employees in the FMCG 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 and Life Sciences, and on a par with Automotive, certainly in terms of attractiveness. In terms of name awareness, however, FMCG is ranked relatively highly, but well behind Automotive, Financial Services and Retail. However, the sector is still located just within Quartile 2 in Australia.

#### Belgium

FMCG employees in Belgium rank their sector highly in terms of attractiveness, but below Life Sciences and IT. They also assign it a high level of name awareness, only below Retail, Hospitality and Financial Services. Employees in other sectors rank FMCG behind Life Sciences, IT, Technology and Consulting in terms of attractiveness. In terms of name awareness, they rank it on a par with Financial Services and Automotive, and just above IT and Technology. This places the sector well within Quartile 2, the best quartile.

#### Canada

FMCG employees in Canada rank their sector as the most attractive sector by far, with a name awareness score that is also better than all other sectors. This exceptional rating is not shared in all respects by workers in other sectors. They agree that FMCG enjoys excellent name awareness



(indeed, better than all others), but they do not endorse its supposed high level of attractiveness. Rather, they place it after IT (the leader), Life Sciences, Technology, Automotive and Consulting. This puts FMCG in danger of being pushed out of Quartile 2 into Quartile 1.

#### China

In China, employees working in FMCG 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. As far as attractiveness is concerned, the sector is ranked relatively low, lagging behind Consulting, Financial Services, Life Sciences, Power & Utilities, Technology and IT. However, FMCG generally enjoys a name awareness that is equal to or better than its nearest rivals, such as IT, Financial Services, Automotive and Retail. This places FMCG in Quartile 1 in China.

#### France

In France, FMCG employees have a relatively realistic, though inevitably over-stated view of their sector's attractiveness and name awareness. Workers in other sectors position FMCG on a level of attractiveness equivalent to that of IT and Life Sciences, behind Chemical, Services and the leader, Technology. In terms of name awareness, FMCG is ahead of Services and Technology (and many others), but behind Power & Utilities, Automotive, Financial Services, Hospitality and, of course, Retail. This places FMCG in Quartile 2.

#### Germany

FMCG employees in Germany take a very pessimistic view of their sector in terms of attractiveness, though estimating its name awareness quite accurately (Quartile 1). Respondents in other sectors, however, are more optimistic about FMCG and place it in Quartile 2. They position FMCG relatively close to Technology and Automotive. But they rank IT as better positioned than both, in terms

of both attractiveness and name awareness. They also see FMCG as less attractive than Consulting (which is seen as the most attractive sector in Germany), but since the latter has such low name awareness, it is unlikely perhaps to form a serious competitor.

#### **Hong Kong**

FMCG employees in Hong Kong believe the sector is attractive, but has only modest name awareness (borderline Quartiles 2 and 4). However, those working in other sectors see FMCG, in terms of attractiveness, as being a long way behind IT (the best-positioned sector in Hong Kong) and also behind many other sectors, including Life Sciences, Technology and Automotive. Automotive and IT are the only two sectors positioned clearly within Quartile 2 in Hong Kong. The sector closest to FMCG in Hong Kong is Financial Services, both being in Quartile 1.

#### **Hungary**

FMCG sector employees in Hungary have an unrealistic view of their sector's position, giving it the highest ranking in terms of attractiveness and name awareness. But people working in other sectors rate the FMCG sector in Hungary less highly on both counts. They still see it as a relatively attractive sector, ranking it behind IT, Automotive, Technology and Life Sciences. The name awareness of FMCG is relatively good, being just less than that of Financial Services and Retail. Those with a similar attractiveness ranking are Life Sciences and Consulting, but both have very poor name awareness. The sector closest to FMCG overall is Chemical. FMCG is on the borderline of Quartiles 1 and 2 in Hungary.

#### **India**

Those who work in the FMCG sector in India have a rather pessimistic view of their sector, slightly underestimating its attractiveness compared to global respondents and placing it in Quartile 1. People working in other sectors consider FMCG to be relatively well known – almost on a par with IT and Financial Services. But in terms of attractiveness, they place it after Hospitality, Automotive, Technology, Consulting and IT, which takes the lead in India. All in all, this rating is enough to keep FMCG in Quartile 2 in India.

#### **Italy**

The FMCG sector in Italy is well thought of by employees in the sector but it is not so well positioned by those working in other sectors. In

terms of attractiveness, FMCG takes a 'mid-field' position, on the border between Quartile 1 and Quartile 2. It follows IT, Technology, Industrial/ Manufacturing, Automotive, Life Sciences and Chemical. In terms of name awareness, FMCG is on a par with Retail, Automotive and IT.

#### **Japan**

People working in FMCG in Japan rate the sector highly, with good name awareness and attractiveness. Although the degree of attractiveness is somewhat 'over the top' when confronted with the more objective view of people in other sectors, it is certainly true that FMCG is the most attractive sector in Japan, ahead of IT, Life Sciences and Consulting. In terms of name awareness, the sector is well up with the leaders: Retail, IT, Automotive and Chemical. They all enjoy the same level of name awareness. FMCG is well placed within Quartile 2 in Japan.

#### **The Netherlands**

Those working in the FMCG sector in the Netherlands rank the sector very highly indeed – perhaps unrealistically so. Those working in other sectors also rate FMCG highly in name awareness, placing it above most sectors (though not Retail, Automotive and Financial Services). In attractiveness, FMCG ranks only after IT and Technology, placing it well within Quartile 2.

#### **New Zealand**

FMCG employees in New Zealand position their own sector close to Automotive, which is one of the most popular sectors in New Zealand. Workers in other sectors believe that FMCG is less favorably placed both in terms of name awareness and attractiveness. They position the sector as less attractive than Technology, Automotive, IT and Consulting. As far as name awareness is concerned, FMCG is placed as slightly better than IT, though not as good as Automotive, Retail and Financial Services. All in all, FMCG is well placed within Quartile 2 in New Zealand.

#### **Poland**

FMCG employees in Poland have a relatively realistic picture of their sector, inflating only slightly its ranking in attractiveness and name awareness. Employees working in other sectors rank the sector closest to Power & Utilities, which is, however, slightly more attractive. FMCG is less well-known than Services, but on a par with Automotive. FMCG is located in Quartile 1 in Poland, ranking #9 in terms of attractiveness.



### Russia

FMCG employees in Russia have a realistic view of their sector, locating it in Quartile 1, just like employees in other sectors. Clearly, FMCG is seen as one of the least attractive sectors, better only than Life Sciences, Hospitality and Retail. In terms of name awareness, it is well below Automotive, the leader, and slightly above IT. Its closest neighbor is Financial Services.

### Singapore

In Singapore, those working in FMCG experience their sector as highly attractive. Employees in other sectors, however, see FMCG more realistically. In terms of attractiveness, they place the sector after IT, Life Sciences, Hospitality and Automotive, and place it on a par with Power & Utilities. As far as name awareness is concerned, FMCG is placed just after behind Financial Services, Automotive, IT and Retail. FMCG in Singapore is located on the borderline between Quartiles 1 and 2.

### Spain

FMCG employees in Spain overestimate the attractiveness of their sector, but are relatively realistic about its name awareness. In terms of attractiveness, workers in other sectors put FMCG far behind the leader (IT), Life Sciences, Technology and Automotive, but slightly ahead of IT and Technology in terms of name awareness. Its ranking on both axes is sufficient to locate it safely in the best quartile, Quartile 2.

### Sweden

Those working in the FMCG sector in Sweden overrate its attractiveness, but estimate its name awareness about right. In terms of attractiveness, workers in other sectors rank FMCG behind all other sectors except Power & Utilities, Logistics and Hospitality. In terms of name awareness, they rank FMCG on a par with Services and Power & Utilities, but far behind Retail and Automotive. These ratings mean that FMCG in Sweden is located in Quartile 1, along with Power & Utilities, Construction and Retail.

### Switzerland

FMCG employees in Switzerland are content, positioning their sector as the most attractive after IT, and as having reasonable name awareness. However, global respondents take a more nuanced view of the sector. They see FMCG as far 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 its nearest neighbor Automotive. It is still placed in Quartile 2, but close to the border with Quartile 1.

### UK

FMCG employees in the UK grossly overestimate the sector's attractiveness, and to a lesser extent also its name awareness. Those working in other sectors place FMCG in a central location on the grid, in Quartile 1, close to the border with Quartile 2. In attractiveness, they position it after IT (the leader), Automotive and the technology-related sectors (Industrial/Manufacturing, Technology, Life Sciences and Consulting). In terms of name awareness, they rank it above most sectors, but below Retail, Automotive, Power & Utilities and Financial Services.

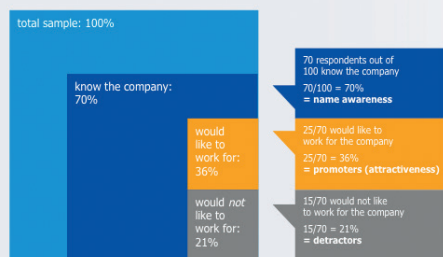
### USA

FMCG employees in the USA have a pessimistic opinion of their sector in terms of attractiveness, placing it among the bottom four sectors. However, they have a realistic perception of the sector's name awareness. Employees in other sectors position FMCG as the sector with the best name awareness, above Retail. In terms of attractiveness, FMCG takes a rather low position (#9), placing it in Quartile 1, along with Retail, Chemical and Financial Services.



## Randstad Award - concept

### Randstad Employer Attractiveness Score (REMAS)



$$\text{REMAS} = \text{promoters} - \text{detractors} = 15\%$$

### 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.

#### 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

The table shows how, by using the REMAS, one can quickly see how the FMCG sector (for instance) measures up against other sectors in terms of employer attractiveness. With a score of 20%, FMCG is ranked #7.

# 4 Randstad Award

## 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, FMCG employees and FMCG 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		FMCG employees		FMCG advocates	
1.	IT 56%	1.	IT 59%	1.	FMCG 73%
2.	Life Sciences 49%	2.	Life Sciences 54%	2.	IT 68%
3.	Consulting 48%	3.	Technology 54%	3.	Life Sciences 66%
4.	Automotive 47%	4.	FMCG 51%	4.	Automotive 62%
5.	Technology 47%	5.	Automotive 51%	5.	Technology 62%
6.	Industrial-Manufacturing 45%	6.	Consulting 50%	6.	Industrial-Manufacturing 60%
7.	FMCG 44%	7.	Industrial-Manufacturing 49%	7.	Consulting 60%
8.	Hospitality 40%	8.	Chemical 48%	8.	Construction 55%
9.	Construction 40%	9.	Construction 46%	9.	Chemical 53%
10.	Financial services 40%	10.	Financial services 46%	10.	Hospitality 53%

### how people in other sectors see FMCG

Global respondents (those who do not work in the FMCG sector but who know one or more companies operating in it) give the FMCG sector a REMAS of 44%, placing it in #7 position, after Industrial/ Manufacturing (45%) and ahead of Hospitality (40%).

### how those currently working in FMCG see their sector

FMCG employees put FMCG at #4, with a REMAS of 51%, after Technology and ahead of Automotive.

### how those wanting to work in FMCG see the sector

FMCG advocates, not surprisingly, give FMCG the highest score, 73%, with IT and Life Sciences coming in at #2 (68%) and #3 (66%) respectively.

### how subgroups rank sectors as most attractive

All respondents ranked IT as the most attractive sector. It will therefore be interesting to see what we can learn from which sectors they rank as second and third.

### most attractive sector within subgroups viewed by all respondents

	1 <sup>st</sup> position	2 <sup>nd</sup> position	3 <sup>rd</sup> 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

### 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 gives 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.

### FMCG employees and FMCG advocates

FMCG employees in general see IT as the most attractive sector, while FMCG advocates, without exception, see FMCG as the most attractive sector. Life Sciences and Technology form popular alternative choices among employees, while FMCG advocates are agreed on placing IT in second place, and many choose Life Sciences as third sector of choice. Interestingly, FMCG employees generally do not even mention FMCG in their top 3 of most attractive sectors, with the exception of workers with primary/secondary education, who rank it #2.

#### most attractive sector within subgroups viewed by FMCG employees

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

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#### most attractive sector within subgroups viewed by FMCG advocates

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

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## how people rank sector attractiveness on the basis of functional attributes

Earlier in this report, we analyzed the value that global respondents, FMCG employees and FMCG 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, FMCG employees and FMCG advocates.

### FMCG

The FMCG sector ranks only a few times as third most attractive sector, and occasionally as second – though in both cases only by FMCG employees and advocates, as global respondents do not put FMCG in the top three sectors for any attribute. The sector is seen by FMCG employees and FMCG advocates as offering strong management, a pleasant working atmosphere, financial stability, long-term job security, and a good work/life balance.

### 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 are apparently seen as providing greater security and given first ranking, with IT having to be content with second position. The IT sector is also popular among FMCG employees and advocates.

### Consulting

Consulting is seen by all respondents, FMCG employees and FMCG 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, FMCG employees and FMCG 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.

#### most attractive sector by attribute viewed by all respondents

	1 <sup>st</sup> position	2 <sup>nd</sup> position	3 <sup>rd</sup> 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 FMCG employees

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

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#### most attractive sector by attribute viewed by FMCG advocates

	1 <sup>st</sup> position	2 <sup>nd</sup> position	3 <sup>rd</sup> position
salary/employee benefits	IT	Consulting	Life Sciences
career opportunities	IT	Consulting	Life Sciences
pleasant working atmosphere	IT	Life Sciences	FMCG
long-term job security	Life Sciences	IT	FMCG
good work/life balance	IT	Life Sciences	FMCG
financially healthy	Life Sciences	FMCG	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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## Automotive

The Automotive sector ranks high several times. 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 FMCG employees believe the Automotive sector also offers good training opportunities.

## Hospitality

Interestingly, the Hospitality sector is also mentioned once as an option by all respondents, particularly as providing a pleasant working environment.

### 4.2. most attractive companies

This Randstad Global FMCG 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
<b>APAC</b>			
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	Feltrinelli
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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