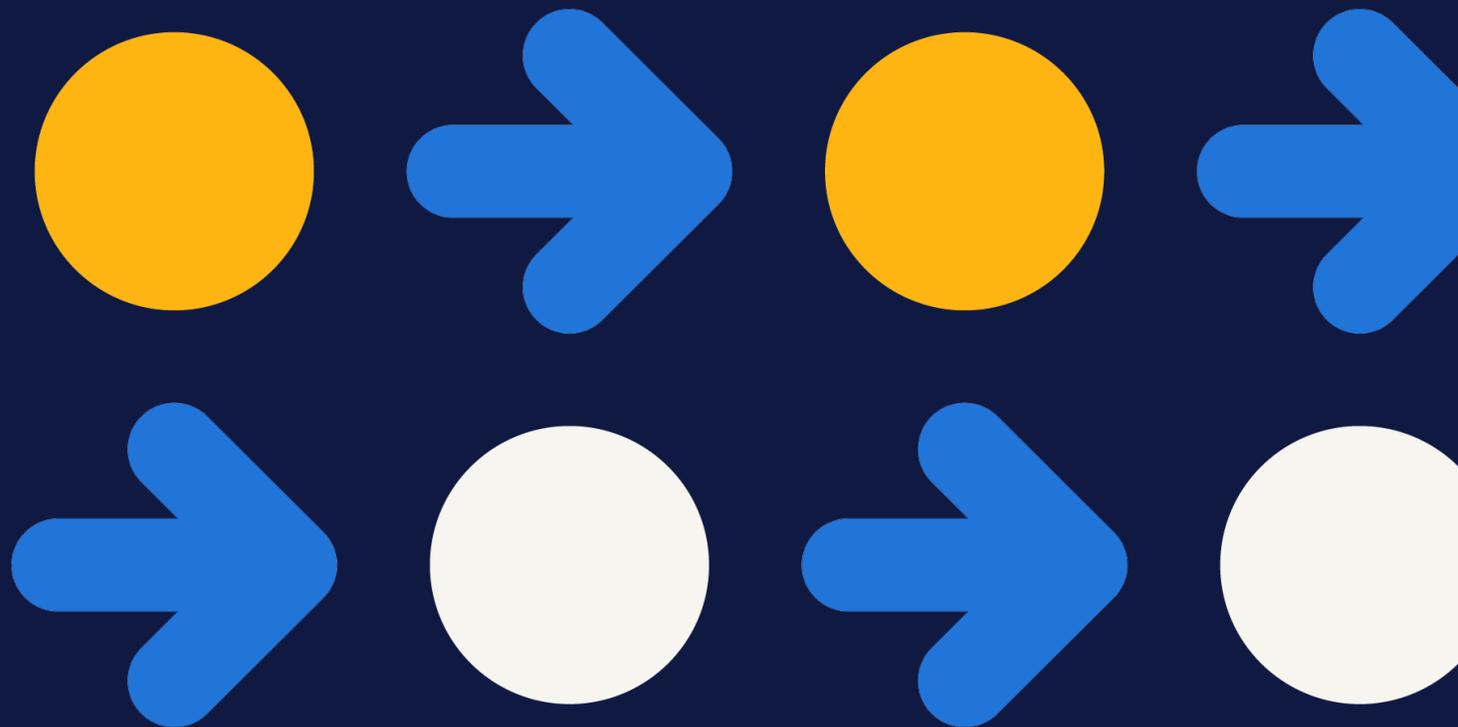


employer
brand research
2021



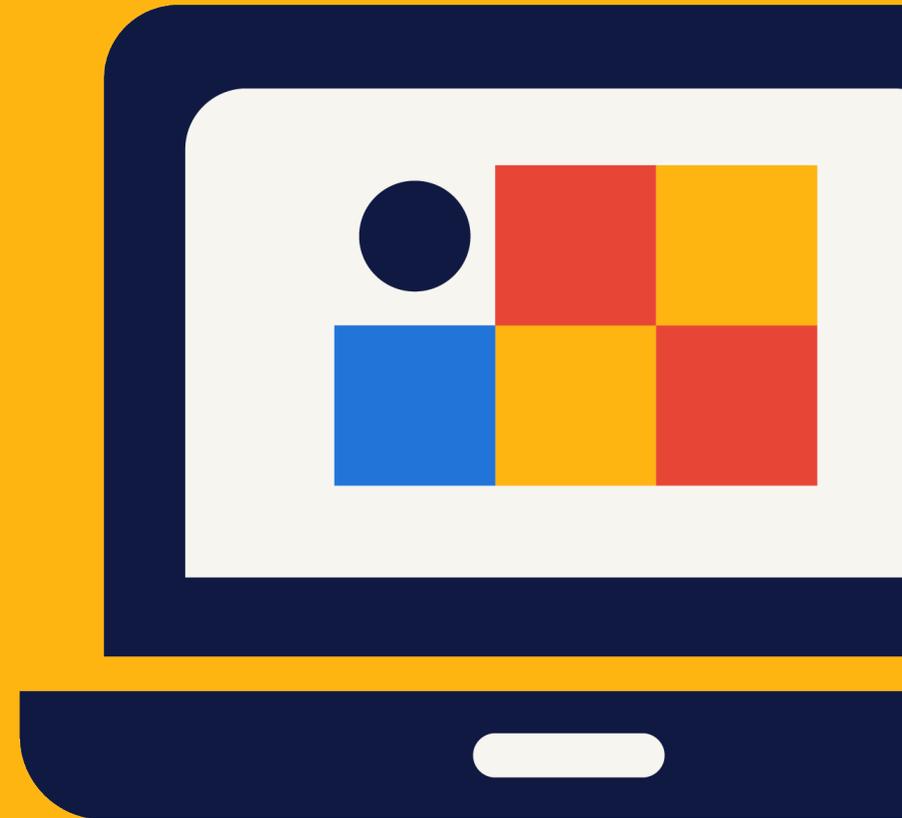
greece.

 randstad

human forward.

content.

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



what is the randstad employer brand research?

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



the employer brand roadmap.



why employer branding matters.



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

50%

of candidates say they wouldn't work for a company with a bad reputation - even with a pay increase.²

96%

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

80%

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

why employer branding matters.

19%

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

1-2x

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

#1

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

76%

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

52%

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



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

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



● markets surveyed

[click here](#) for detailed research methodology

worldwide

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

sample

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

country

- 3,600 respondents

fieldwork

- online interviews
- january 2021

length of interview

- 16 minutes



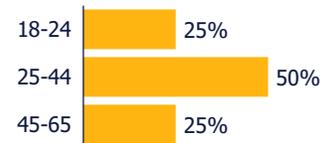
sample composition in greece

socio-demographics, employment status, region.

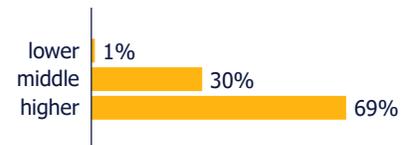
gender



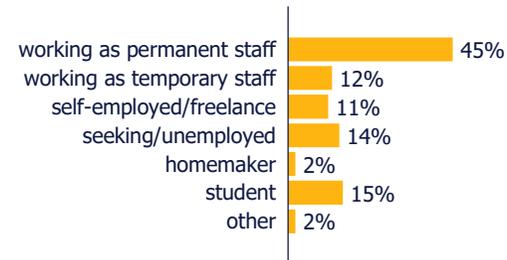
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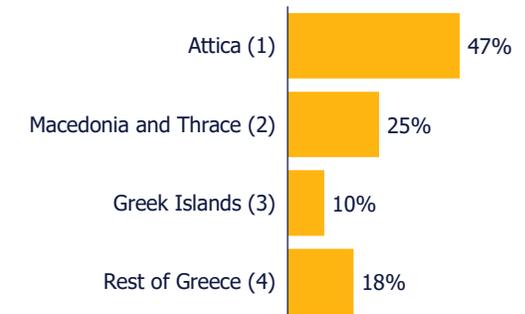
education



employment status



region



1. Attica
2. Central Greece, Epirus, Peloponnese, Thessaly, West Greece
3. Central Macedonia, East Macedonia and Thrace, West Macedonia
4. Crete, Ionian Islands, North Aegean, South Aegean

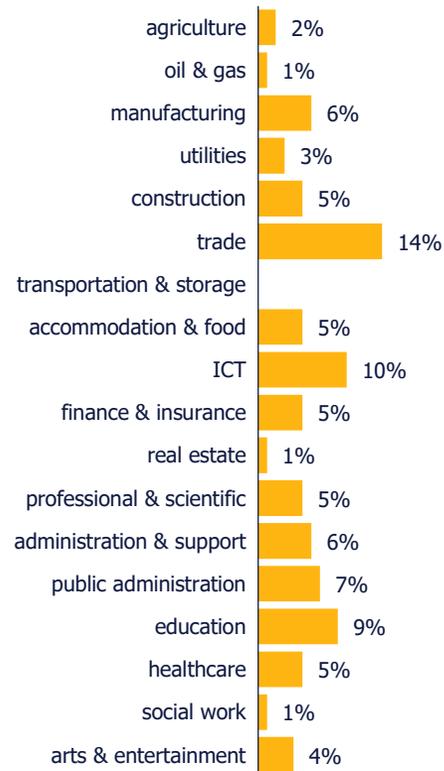
total sample: 3,600
fieldwork: january 2021



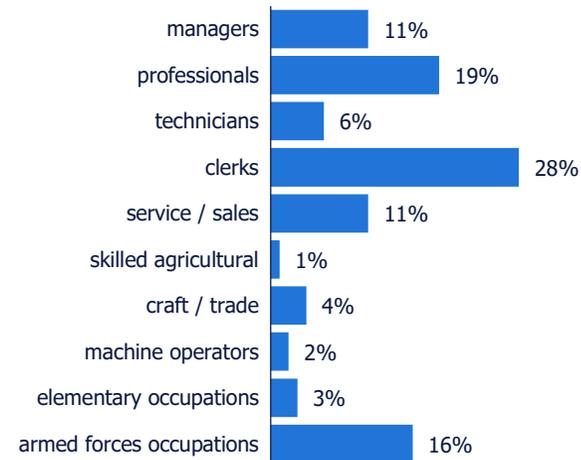
sample composition in greece

sector, function.

sector



function



base: currently employed (n=2,431)



greece

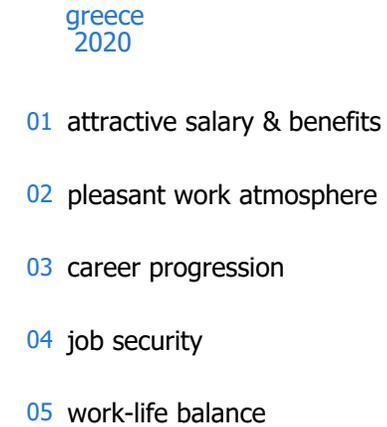
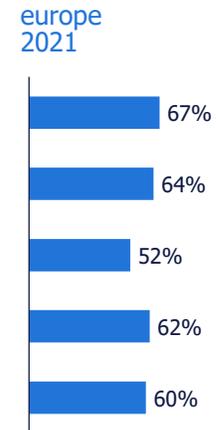
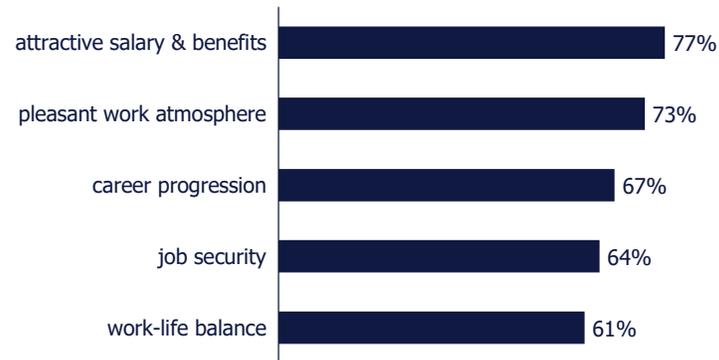
employer
attractiveness.



what potential employees want

the 5 most important drivers when choosing an employer.

top 5 most important drivers



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

what potential employees want when choosing an employer.

most important driver

salary & benefits

Salary & benefits are the most important driver among employees in Greece and scores the highest among women, those aged 35 and older, and higher- educated employees. Overall women are more demanding and consider most of the drivers more important than men do, except for financially healthy and the use of the latest technology. Although the possibility to work remotely is rated low among employees, women and the higher-educated do feel more strongly about this offering.

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

employers' proposition

COVID-19 safe and very good reputation

Greek employees rate their own employers highest on having a COVID-safe work environment and for having a very good reputation. This is followed by being a financially healthy business. Men rate their employer higher on most drivers than what women do. Attributes that men rate higher than women are on salary & benefits, job security, and career progression. The lowest ratings given by employees are for the possibility to work remotely and career progression.

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

recommended employer focus

career progression and salary & benefits

Career progression is an important driver among employees this year and is especially true for women. The average Greek employer receives a low rating on this driver by its employees. It is therefore recommended that the average employer in Greece pay more attention to employee career progression. Furthermore, employees rate their salary & benefits as one of the lowest drivers offered by their employer, despite this being an important driver for all employees. As this is a consistent driver coming up among the Greek workforce, it may be worthwhile keeping this element in mind when focusing on employees' needs.



what do potential employees want job collars in focus.

white-collar

65%

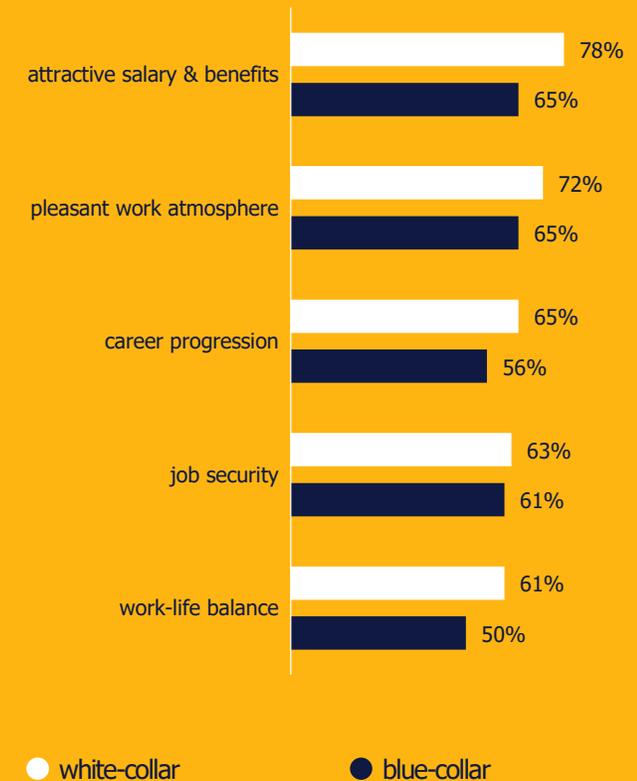
of white-collar employees consider career progression as one of the most important drivers, which is higher than among blue-collar workers. Overall, this group is in line with what the average Greek employee is looking for.

blue-collar

65%

of blue-collar workers consider salary & benefits and a pleasant work atmosphere as equally important, closely followed by job security.

most important attributes



job-switching behavior



in focus.

switching behavior finding another employer.

1 in 11 Greeks changed employer

9% Of Greek employees changed their employer in the last half of 2020, more so among 18-34-year-old employees (average 12%). Furthermore, another 22% of employees intend to switch employers in the first half of 2021 and sees the same age group doing so (18–34-year-olds) as well as women and higher-educated employees. Those who changed their employer attach more value to career progression, gives back to society, job content, diversity, reputation, strong management, and the latest technologies than those who stayed with their employer.

personal connections on top

The most used channels by switchers are by far personal connections (43%). Job portals (29%) follow in second place.



most important attributes switchers vs. stayers.

switchers

2021

9%

changed employer in the
past 6 months.

2021

10%

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

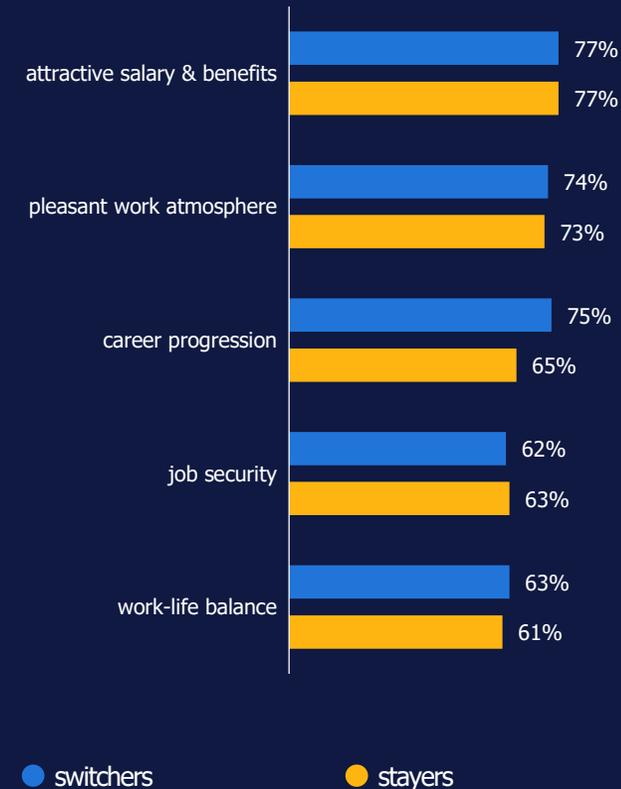
stayers

2021

91%

stayed with their employer
in the past 6 months.

most important attributes



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

switching behavior job collars in focus.

white-collar intenders

20%

of white-collar employees intend to switch to another employer in the first half of 2021. This is not too different from the average Greek employee (22%) who intends to switch employers.

blue-collar switchers

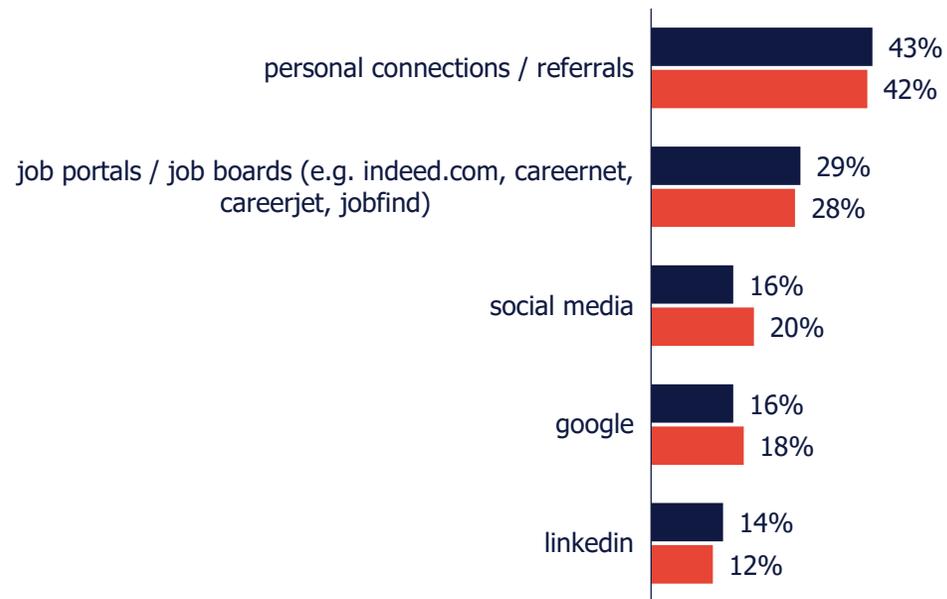
11%

of blue-collar employees switched employers in the last half of 2020. This is slightly higher when compared to the average Greek employee (9%).



how do employees in greece find new job opportunities.

top 5 channels used to find new job opportunities



top 3 job portals

*base is too small for 2021

top 3 social media channels

*base is too small for 2021

● 2021

● 2020



COVID-19

in focus.



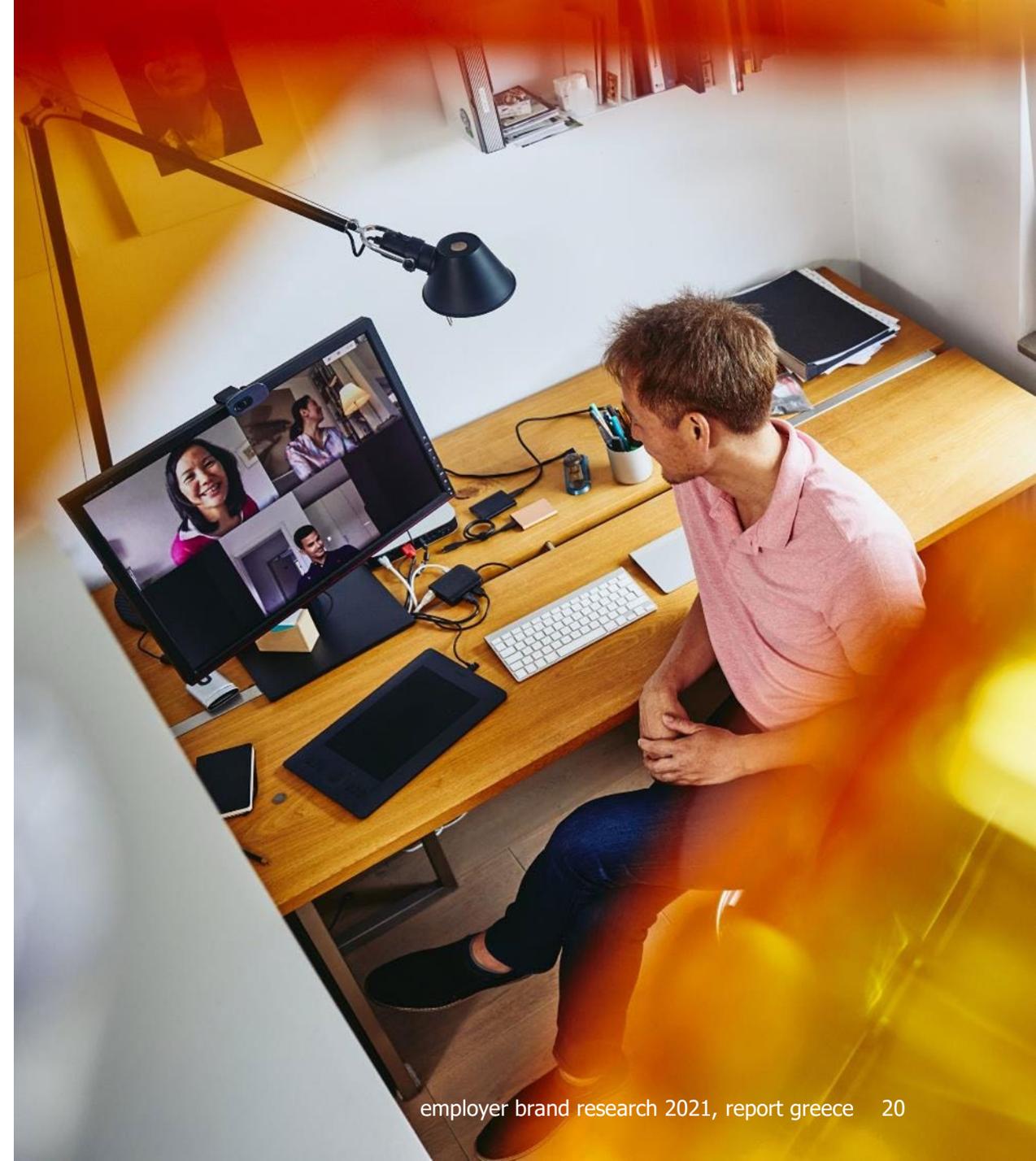
COVID-19 and its impact on the labor market.

possibility of working remotely far from important

38% of Greek employees are attracted by the possibility to work remotely which makes this one of the least important drivers to employees. Women and higher educated employees are more inclined to rank this driver as more important, however, it still trails behind the drivers that are more attractive to them. Both full-time and part-time employees consider working remotely as equally important.

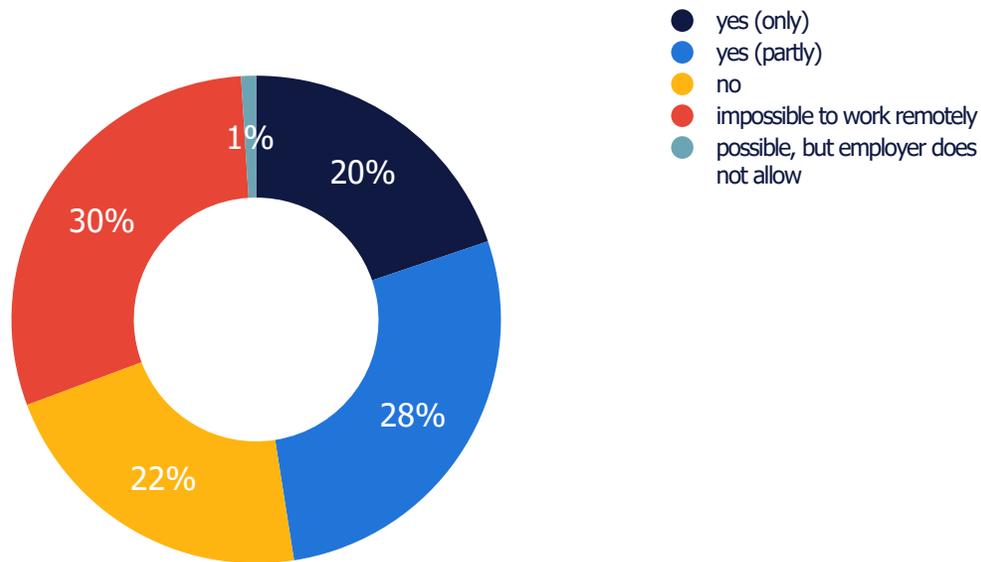
half of the employees started to work (more) remotely during COVID-19 pandemic

Out of the 48% employees who started working more remotely, 52% were involved in the decision to work remotely, whereas 48% of employees working remotely had no choice in the decision to do so. 50% of men and 45% of higher-educated employees continued to work as normal as opposed to just 31% of women and 29% of middle-educated employees.



remote working due to COVID-19.

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



greece

16%

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

Having an influence or not on the decision to work more remotely is higher among the youngest age group (28%). Furthermore, it is primarily higher-educated employees that started working more remotely.

Only 1% of employees who can work from home are not allowed to do so by their employer. Next to that 22% of employees' jobs are bound to the premises which makes working from home or elsewhere impossible.

europe

23%

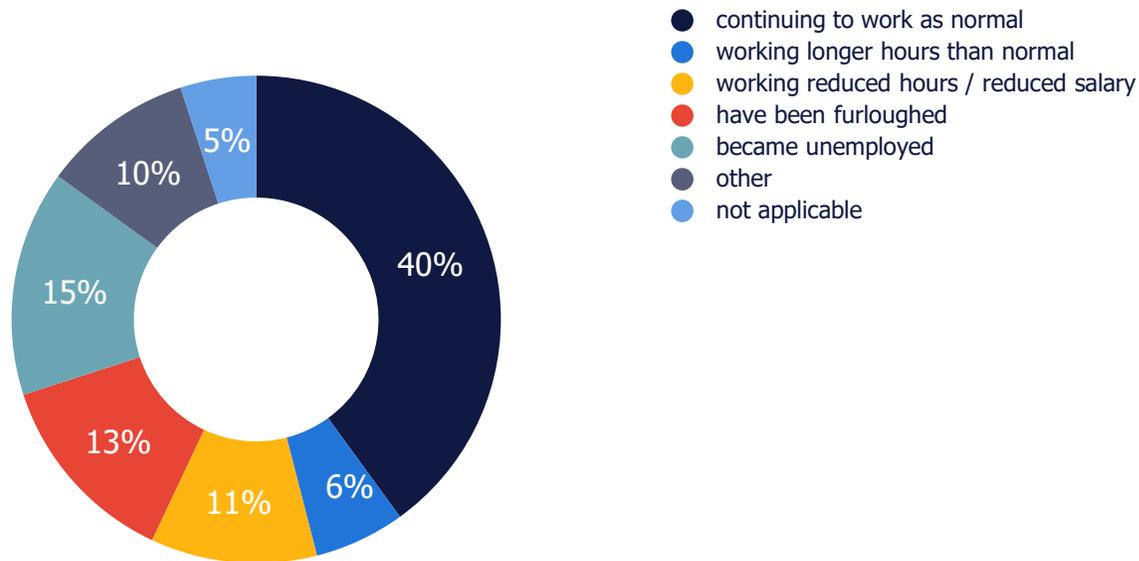
of the employees who said they worked remotely, do so out of their own decision.

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

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

employment situation changes due to COVID-19.

how COVID-19 changed one's employment situation



more than half of employees saw their employment situation change

55% of employees were either furloughed, became unemployed, worked different hours than usual or for other reasons saw their employment situation change due to COVID-19.

A higher proportion of those who became unemployed were among women (18%) and 18–24-year-olds (20%).

Half of the workforce, however, continued to work as normal. This is especially true for men (50%), those who are aged between 35–54 (50%) and higher-educated employees (45%).

europa

39%

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

job loss fear in 2021 intention to switch.

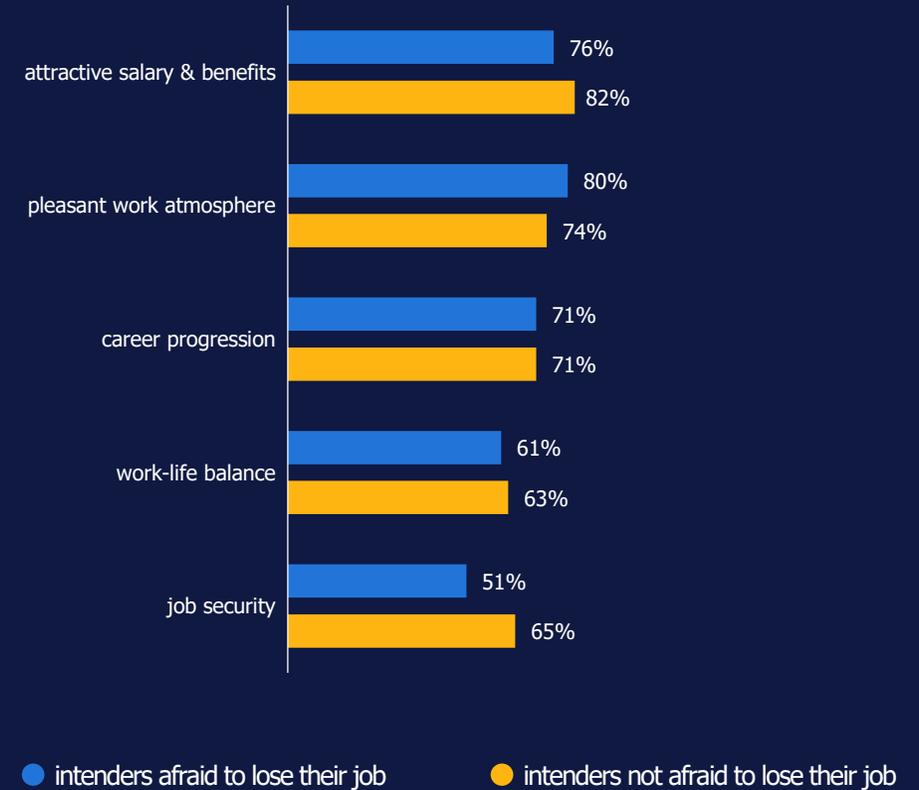
29%

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

10%

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

most important attributes



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

intention to switch amongst those affected by COVID-19.

intenders

2021

22%

plan to change employer in the next 6 months.

intenders

2021

31%

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

If one's employment situation has changed due to COVID-19, the intention to change to a new employer is considerably higher (31%) than those who just intend to change employers (22%).

The way Greek employers have supported and handled the pandemic in the workforce has had a positive impact on loyalty among employees. Overall, 53% of employees feel more loyal to their employer as opposed to 11% who feel less loyal to their employer. Furthermore, employees aged between 18-24 (19%) feel less loyal to their employer.

Surprisingly, one can see a higher level of loyalty among employees who were obliged to work from home (57%) compared to those where the decision could be made by themselves (36%).



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

job loss fear in 2021 due to COVID-19.

considerable fear of losing job

The COVID-19 pandemic has caused varied concerns among employees over the security of their jobs. Employees were asked about how worried they are about losing their job in 2021 due to COVID-19.

In Greece, 35% of employees indicated that they are afraid of losing their job. A greater number can be seen among women (40%) and 18–34-year-olds (average 40%).

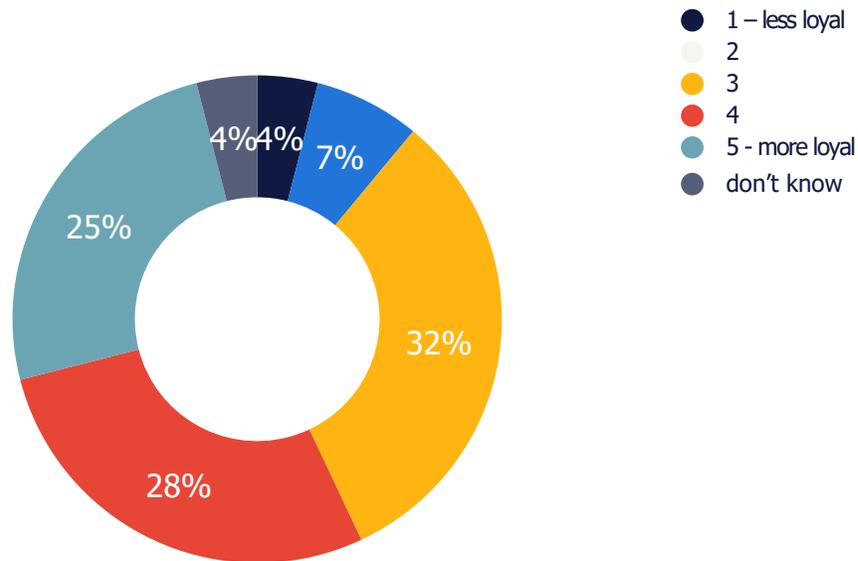
29% of employees who are afraid of losing their job plan to change their employer in the first half of 2021, whereas only 10% of employees who are not worried about becoming unemployed intend to switch jobs.

On the other hand, 41% of employees in Greece are not at all afraid of losing their job this year.



loyalty towards employers during the pandemic.

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



works only remotely

55% of the employees who only work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

works partly remotely

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

obliged to work remotely

57% of the employees who were obliged by their employer / authorities to work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

own decision to work remotely

36% of the employees who decided on their own to work from home feel more loyal towards their employer because of how the employer managed the COVID-19 situation.

let's talk.

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

Randstad Hellas

Ioanna Kounoupi

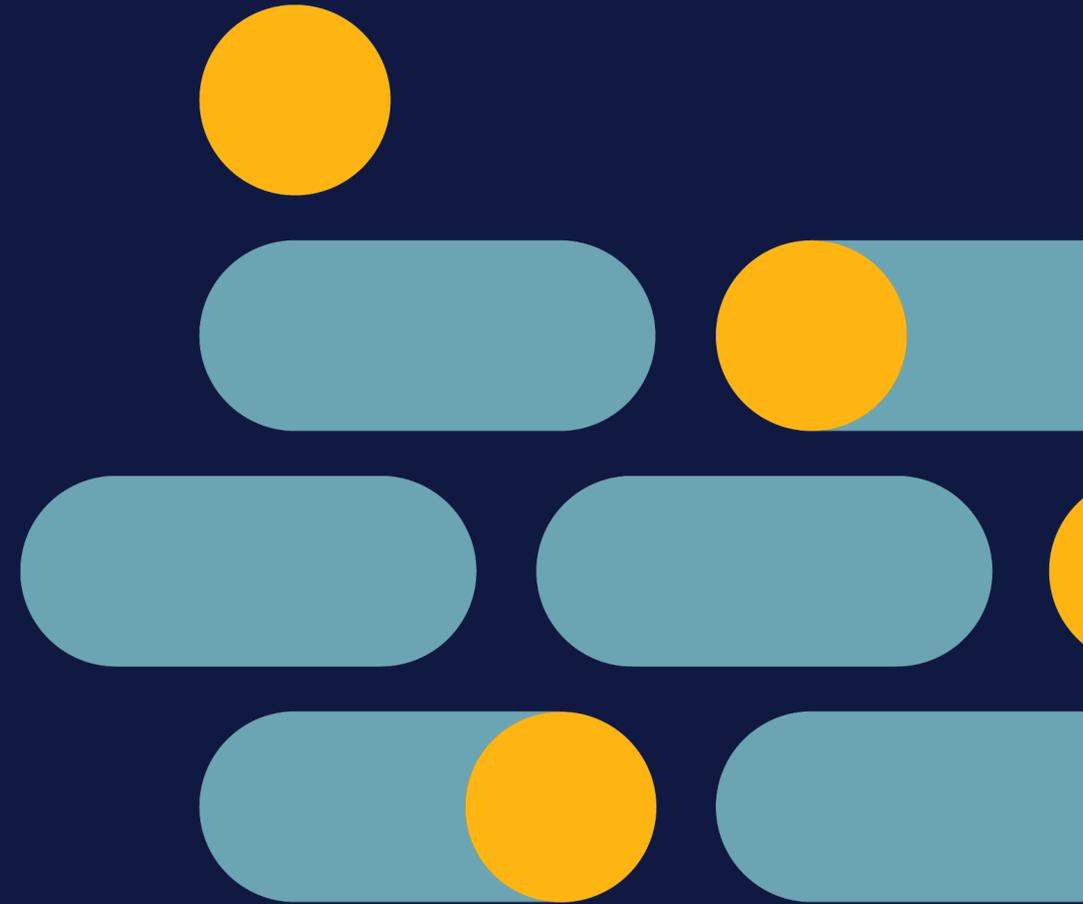
Commercial Manager

ikounoupi@randstad.gr



appendix 1

deep dive
EVP drivers.

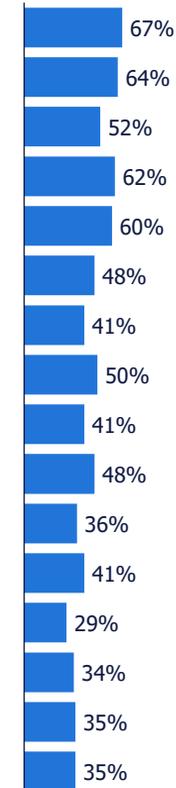


what potential employees want the most important criteria when choosing an employer.

important criteria



europa 2021



greece 2020

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

greece 2019

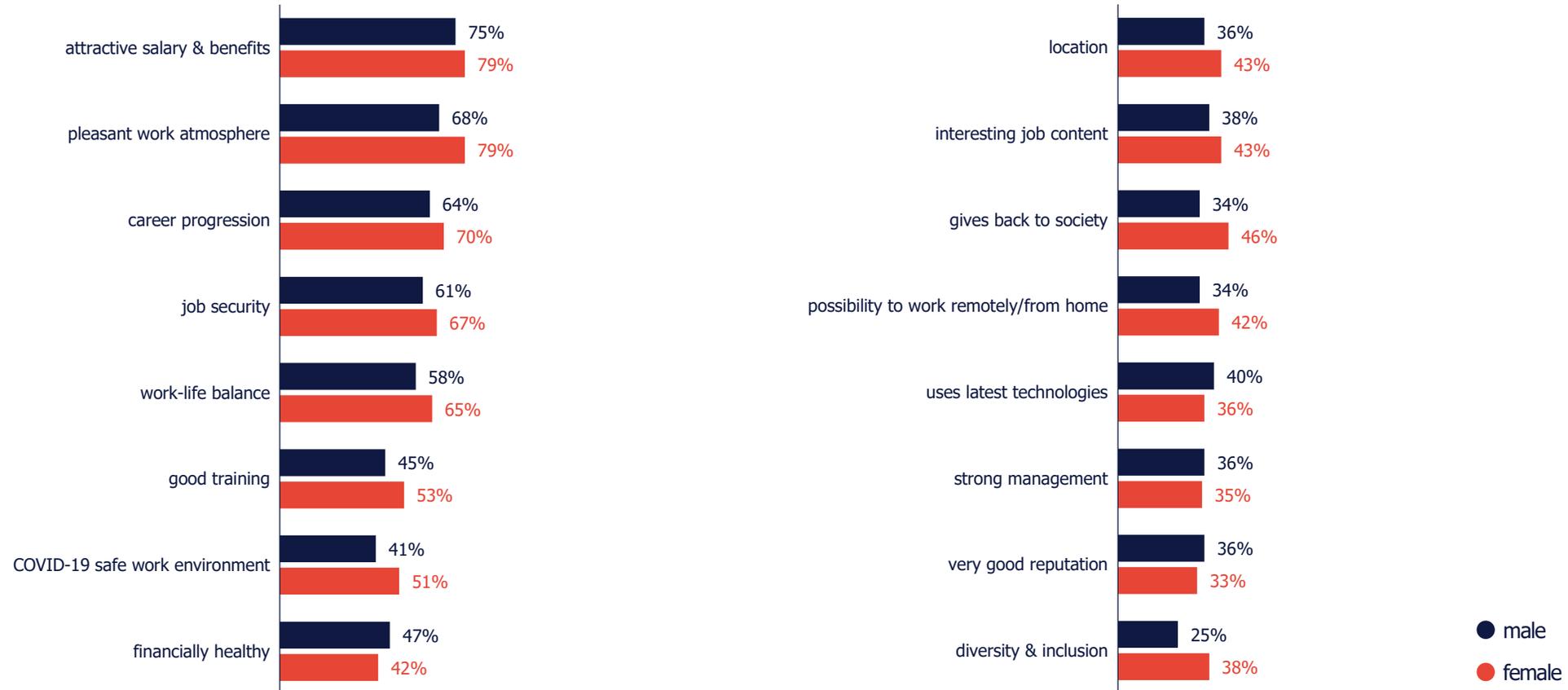
- 01 attractive salary & benefits
- 02 pleasant work atmosphere
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- 04 job security
- 05 work-life balance
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- 07 good training
- 08 location
- 09 financially healthy
- 10 interesting job content
- 11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

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

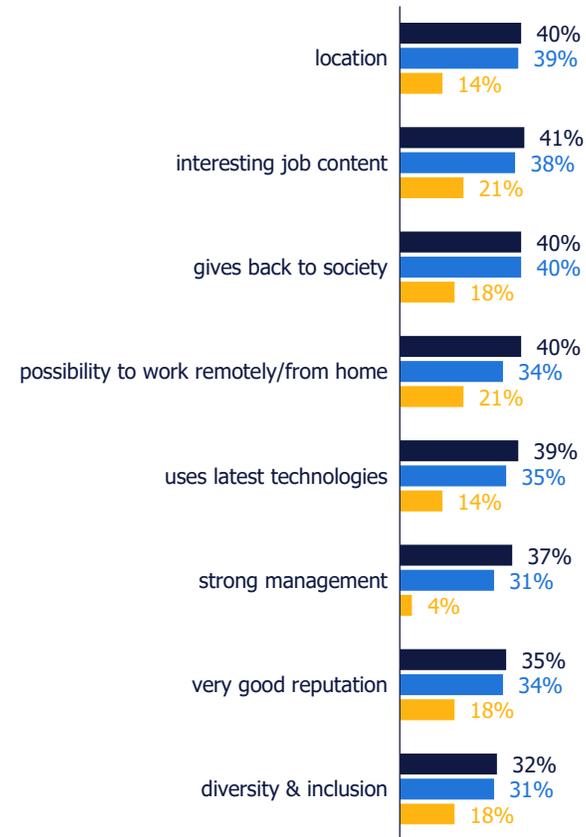
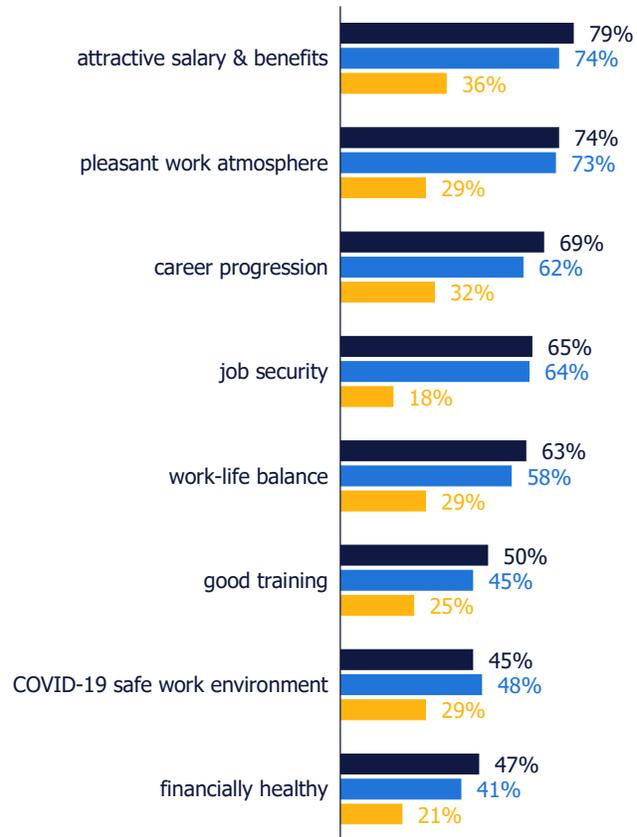
***only researched in 2021 **not researched in 2021



EVP driver importance by gender.



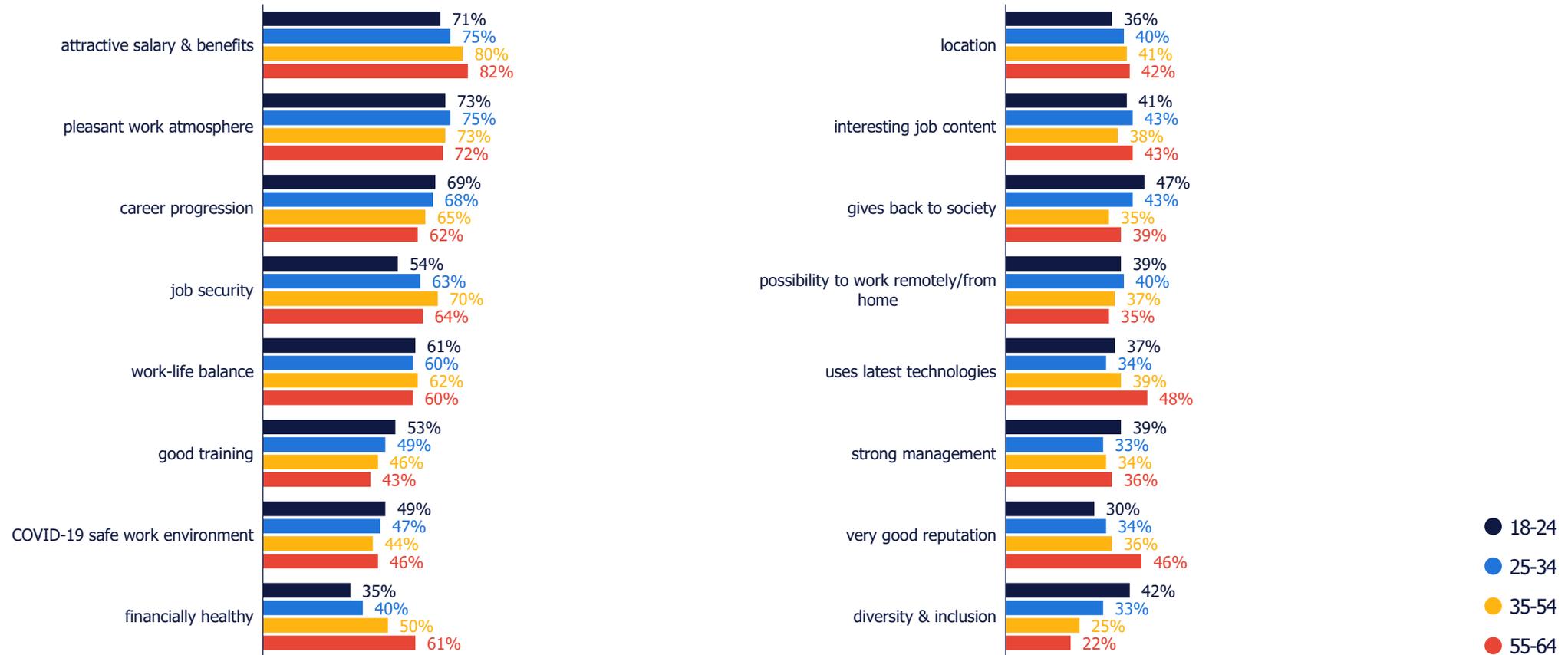
EVP driver importance by education.



● higher
● middle
● lower

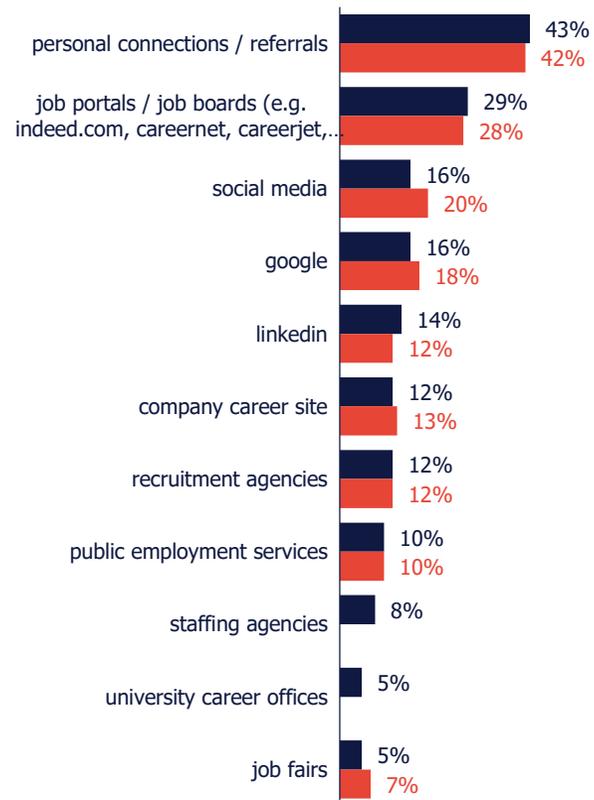


EVP driver importance by age.



how do employees in greece find new job opportunities.

channels used to find new job opportunities



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

*base is too small for 2021

● 2021

● 2020



appendix 2



deep dive
employers.

perception of employer offer in greece.

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

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



perception of employer offer in greece and the region.

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



employers in greece are perceived to offer

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

employers in europe are perceived to offer

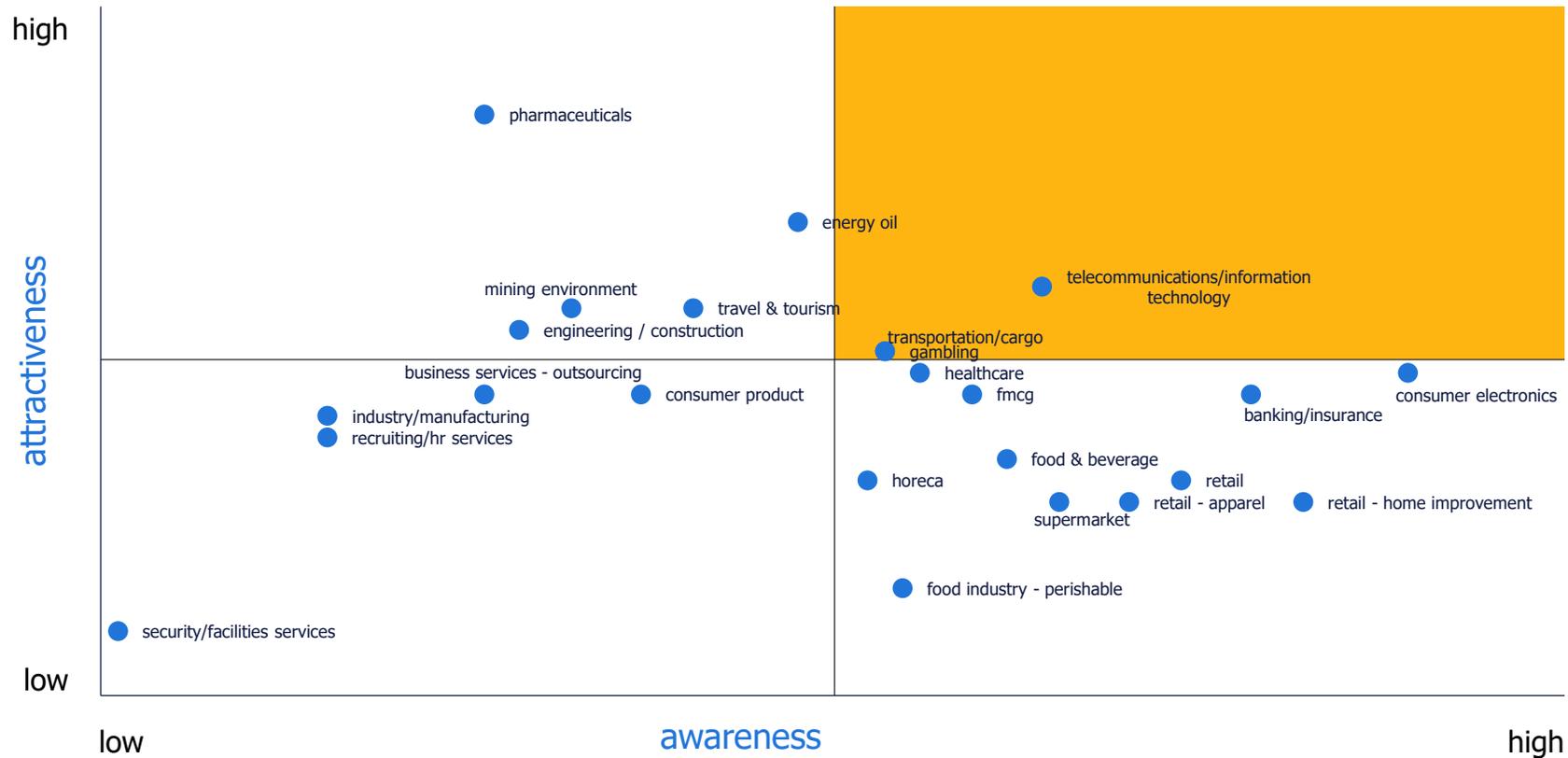
- 01 financially healthy
- 02 job security
- 03 very good reputation
- 04 COVID-19 safe work environment
- 05 career progression
- 06 pleasant work atmosphere
- 07 attractive salary & benefits
- 08 work-life balance
- 09 gives back to society
- 10 possibility to work remotely/from home

sector

insights.



top performing sectors in greece by awareness and attractiveness.



high awareness

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

high attractiveness

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



greece's best performing companies by sector.

1/3

top 3 companies

sector	1	2	3
01 pharmaceuticals	ELPEN PHARMACEUTICAL	DEMO Pharmaceuticals	Vianex
02 energy oil	HELLENIC PETROLEUM	DEI	DEDDIE
03 telecommunications/information technology	Hellenic Telecommunications Organisation SA (OTE)	Intrasoft International SA	INTRACOM HOLDINGS
04 travel & tourism	Aegean Airlines	Atlantica Hotel Management	LAMPSA Hotels (Grand Bretagne, King George, Sheraton Rhodes)
05 mining environment	EYDAP	Helector	SUNLIGHT SYSTEMS
06 engineering / construction	ELLAKTOR S.A.	GEK Terna Holding Real Estate Construction	Ellinika Kalodia
07 gambling	OPAP	INTRALOT S.A.	Regency Casino
08 transportation/cargo	Aegean Airlines	Hellenic Post (ELTA)	Hellenic Railways Organisation SA (OSE)
09 consumer electronics	Public	Plaisio Computers	KOTSOVOLOS DIXON
10 healthcare	IATRIKO KENTRO	HYGEIA HOSPITAL	Mitera Hospital



greece's best performing companies by sector.

2/3

sector	top 3 companies		
	1	2	3
11 consumer product	Sarantis (Carroten, STR8, AVA, Sanitas, Prada, Cartier, Tous, etc)	Estée Lauder	Hellenica Cosmetics SA (Seventeen, Radiant, Lorvenn)
12 banking/insurance	Bank of Greece S.A.	National Bank of Greece	ALPHA BANK
13 fmcg	PAPASTRATOS	ION S.A.	Papadopoulou Biscuits
14 business services - outsourcing	Cosmote E-Value	First Data	TELEPERFORMANCE
15 industry/manufacturing	Mytilineos Holdings SA (Metka, Aluminium of Greece, Proterga)	Ellinika Kalodia	PLASTIKA KRITIS
16 food & beverage	ION S.A.	Papadopoulou Biscuits	Coca Cola
17 retail	Estée Lauder	Public	Diethnis Athlitiki (Admiral, Kappa, Ocean Pacific, Maui & Sons)
18 horeca	LAMPSA Hotels (Grand Bretagne, King George, Sheraton Rhodes)	Regency Casino	Divanis Hotels S.A.
19 supermarket	SKLAVENITIS	AB Vasilopoulos	MASOUTIS
20 retail - apparel	Diethnis Athlitiki (Admiral, Kappa, Ocean Pacific, Maui & Sons)	H & M	Notos Galleries



greece's best performing companies by sector.

3/3

top 3 companies

sector

1

2

3

21 retail - home improvement

IKEA

Praktiker

LEROY MERLIN

22 food industry - perishable

Delta Foods

HELLENIC DAIRIES S.A. (Olympos,
Tyras, Rodopi)

IFANTIS

23 security/facilities services

ESA SECURITY SOLUTIONS S.A.

My Services Security

ICTS Hellas



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

1/3

top 3 EVP drivers

sector	1	2	3
01 pharmaceuticals	financially healthy	COVID-19 safe work environment	very good reputation
02 energy oil	financially healthy	job security	very good reputation
03 telecommunications/information technology	financially healthy	COVID-19 safe work environment	very good reputation
04 travel & tourism	financially healthy	very good reputation	COVID-19 safe work environment
05 mining environment	financially healthy	job security	COVID-19 safe work environment
06 engineering / construction	financially healthy	very good reputation	job security
07 gambling	financially healthy	very good reputation	COVID-19 safe work environment
08 transportation/cargo	financially healthy	job security	very good reputation
09 consumer electronics	financially healthy	COVID-19 safe work environment	very good reputation
10 healthcare	financially healthy	COVID-19 safe work environment	very good reputation



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

2/3

top 3 EVP drivers

sector	1	2	3
11 consumer product	financially healthy	very good reputation	COVID-19 safe work environment
12 banking/insurance	financially healthy	COVID-19 safe work environment	very good reputation
13 fmcg	financially healthy	very good reputation	COVID-19 safe work environment
14 business services - outsourcing	possibility to work remotely/from home	financially healthy	COVID-19 safe work environment
15 industry/manufacturing	financially healthy	very good reputation	job security
16 recruiting/hr services	financially healthy	COVID-19 safe work environment	possibility to work remotely/from home
17 food & beverage	financially healthy	very good reputation	COVID-19 safe work environment
18 retail	financially healthy	COVID-19 safe work environment	very good reputation
19 horeca	financially healthy	very good reputation	COVID-19 safe work environment
20 supermarket	financially healthy	very good reputation	COVID-19 safe work environment



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

3/3

top 3 EVP drivers

sector	1	2	3
21 retail - apparel	financially healthy	COVID-19 safe work environment	very good reputation
22 retail - home improvement	financially healthy	very good reputation	COVID-19 safe work environment
23 food industry - perishable	very good reputation	financially healthy	COVID-19 safe work environment
24 security/facilities services	COVID-19 safe work environment	financially healthy	very good reputation



top



employers.

top employers to work for in greece.

top 10 employers 2021

- 01 PAPASTRATOS
- 02 Aegean Airlines
- 03 ION S.A.
- 04 Bank of Greece S.A.
- 05 Papadopoulou Biscuits
- 06 SKLAVENTITIS
- 07 ELPEN PHARMACEUTICAL
- 08 DEMO Pharmaceuticals
- 09 National Bank of Greece
- 10 Vianex

top 10 employers 2020

- 01 Aegean Airlines
- 02 Hellenic Aerospace Industry
- 03 SKLAVENTITIS
- 04 ION S.A.
- 05 Hellenic Telecommunications Organisation SA (OTE)
- 06 INTRALOT S.A.
- 07 Bank of Greece S.A.
- 08 Pharmathen
- 09 Papadopoulou
- 10 Independent Power Transmission Operator I.P.TO. (ADMIE)

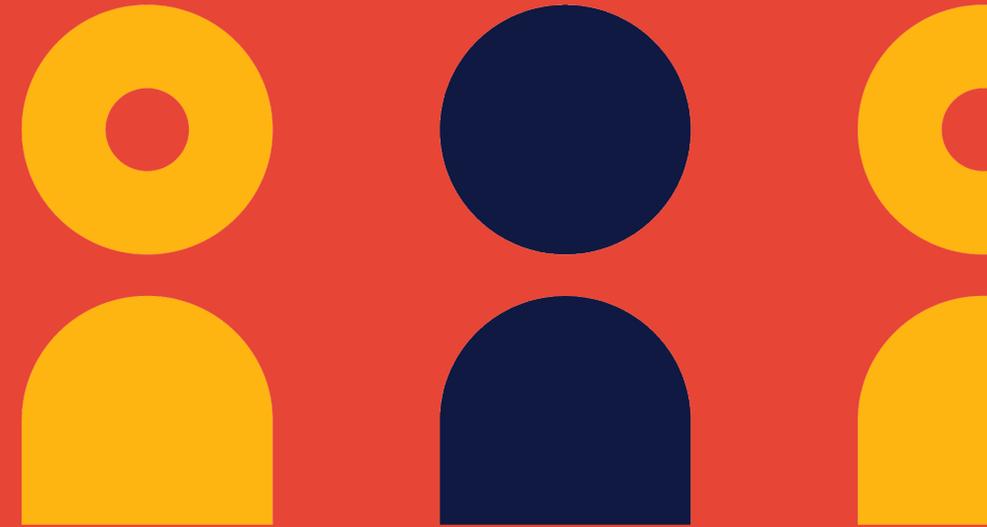
greece's top 3 EVP drivers of the top 5 companies.

top 5 companies	1	2	3
1 PAPASTRATOS	financially healthy	very good reputation	job security
2 Aegean Airlines	very good reputation	financially healthy	pleasant work atmosphere
3 ION S.A.	very good reputation	financially healthy	job security
4 Bank of Greece S.A.	financially healthy	job security	very good reputation
5 Papadopoulou Biscuits	very good reputation	financially healthy	COVID-19 safe work environment

greece's top employers by EVP driver.

EVP driver	1	2	3
attractive salary & benefits	PAPASTRATOS	Bank of Greece S.A.	INTRALOT S.A.
pleasant work atmosphere	PAPASTRATOS	Pharmathen	Aegean Airlines
career progression	PAPASTRATOS	Bank of Greece S.A.	INTRACOM HOLDINGS
job security	Bank of Greece S.A.	PAPASTRATOS	HELLENIC PETROLEUM
work-life balance	PAPASTRATOS	PLASTIKA KRITIS	DEI
COVID-19 safe work environment	ELPEN PHARMACEUTICAL	IATRIKO KENTRO	DEMO Pharmaceuticals
financially healthy	Coca Cola	PAPASTRATOS	Bank of Greece S.A.
gives back to society	SKLAVENITIS	HYGEIA HOSPITAL	IATRIKO KENTRO
possibility to work remotely/from home	TELEPERFORMANCE	Intrasoft International SA	Cosmote E-Value
very good reputation	PAPASTRATOS	SKLAVENITIS	Papadopoulou Biscuits

appendix 3



methodology.

employer brand research set up.

30 companies per respondent

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

for each company known

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

each company known

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

smart sampling

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

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

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

drivers

each company is evaluated on:

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

KANTAR

For this research, Randstad partners with Kantar, one of the world's largest insight, information and consultancy networks.



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