

PwC Employee Preference Survey 2019

Results and main messages



Purpose of our Research

1 We continued our analysis to have an enhanced comprehension of what the workforce of the future desire from their employers

2 The results of the survey provide a full scope preference list to the firms and guides them to shape and deploy the best Employer Value Proposition strategy



37,000+
respondents in 2019

Primarily the opinions of
people aged
16 to 28
overall

56,000+
preference profiles



51%

in higher education*
*may also be working while studying



18%

in high-school
education



27%

employed

West-Transdanubia

1669
participants

Central-Transdanubia

1884
participants

Central Hungary

17934
participants

North Hungary

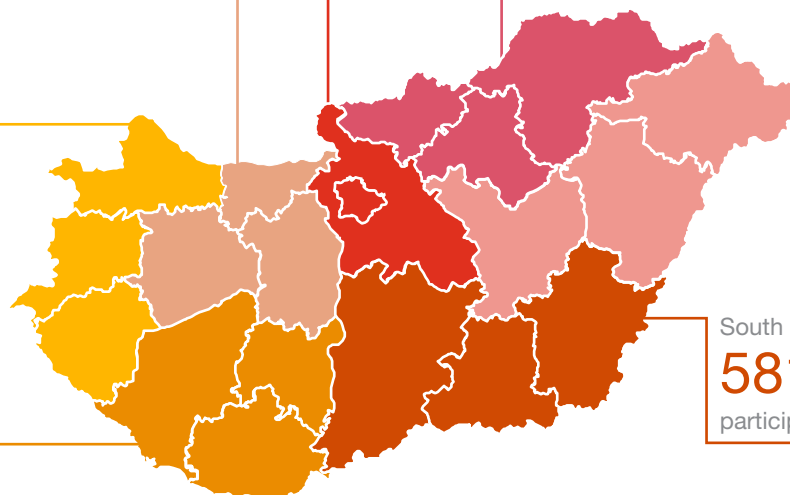
1633
participants

North Great Plain

4743
participants

South-Transdanubia

1571
participants



South Great Plain

5813
participants













Focus Areas of the Survey and Filtering options of the database



10 Focus Areas








We established and extended the range of focus areas for a more in-depth research.

-  Company reputation and culture
-  Career
-  Nature of work
-  Work and life balance
-  Compensation
-  Work environment
-  Other non cash benefits
-  Transparent business operation*
-  Personal development*
-  Internationality*

* Additional focus areas (compared to our 2018 survey)

Filtering options

The continuously improving filtering options of our database provide the opportunity for a thorough research of the preference profiles of specific target groups.

-  Spoken languages
-  Industry interests
-  Company type interest
-  Location interest
-  Residence
-  Field of study
-  Age group



Highlights of the 2019 Survey – Relative Preferences

- | | | |
|-----|---------------------------------------|--|
| #1 | Flexible work schedule and work time | ... |
| #2 | Stability and predictability | |
| #3 | Base pay | ... |
| #5 | Leadership style of direct supervisor | #44 Tools, systems |
| #8 | In house professional trainings | #46 Performance based payment |
| #10 | Teamwork and cooperation | #48 Concierge and amenity services on site |



- ↗ **Stability and predictability** comes in 2nd place, passing Base pay
- ↘ **Cafeteria** falls out of TOP 10 (from the 4th place)
- ↗ **Fix base pay** is strongly preferred to variable pay methods and bonuses
- ↗ **In house professional trainings** moved up to the 8th place (from the 10th)
- Bo The message is clear: generation Y and Z wants **flexibility, interesting and challenging work** while **receiving support from leaders!**



Local Features

– Slight differences in terms of different counties in Hungary (examples)

#1 Flexible work schedule and work time
#2 Stability and predictability
#3 Base pay
Identical in most regions

Leadership style
#4 in Győr-Moson-Sopron county
#5 in Budapest
#6 in Hajdú-Bihar county

In house professional trainings
#5 in Hajdú-Bihar county
#7 in Győr-Moson-Sopron county
#10 in Budapest

Teamwork and cooperation
#8 in Győr-Moson-Sopron county
#11 in Hajdú-Bihar county and Budapest

National mobility

Budapest

70%

would be willing to move Budapest

32%

would move out of the city to smaller towns in Pest county

Csongrád

78%

of participants from Csongrád county would stay

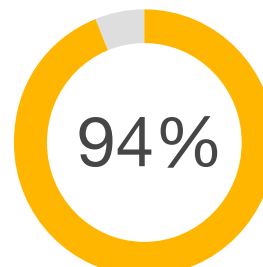
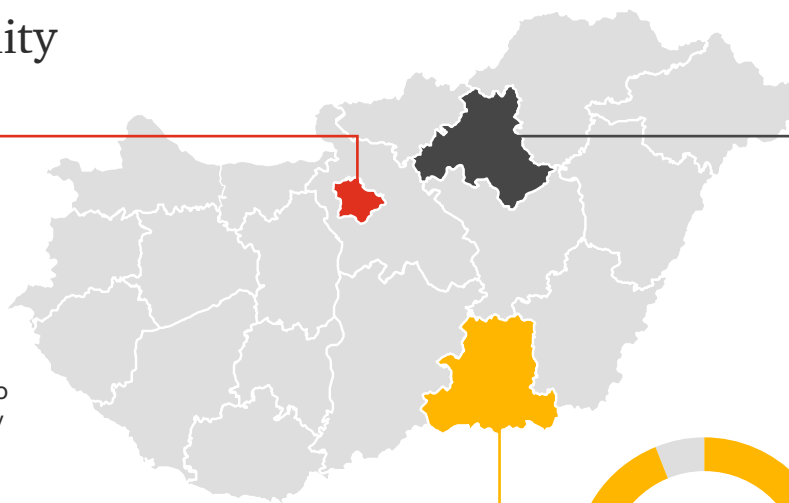
54%

are ready to move to Budapest

Heves

54%

in Heves county can imagine moving to Győr as well



of participants under the age of 25 would consider relocating within Hungary



Industry and Company Type Interest Features TOP priorities (examples)



Automotive industry

- #4 In house professional trainings
- #7 Performance based promotion



SSC

- #4 In house professional trainings
- #7 Performance based promotion





Finance

- #3 Stability and predictability
- #9 Performance based promotion

96% 
of participants research companies before applying

63% 
are interested in working at a Multinational company

28% 
can imagine working at a Startup

21% 
are opened to opportunities in the Public sector



Pharmaceutical industry

- #4 Work that is interesting and challenging
- #9 Colleagues



IT

- #2 Base pay
- #5 Home office
- #8 Leadership style of direct supervisor



Manufacturers

- #6 Performance based promotion
- #8 Teamwork

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