

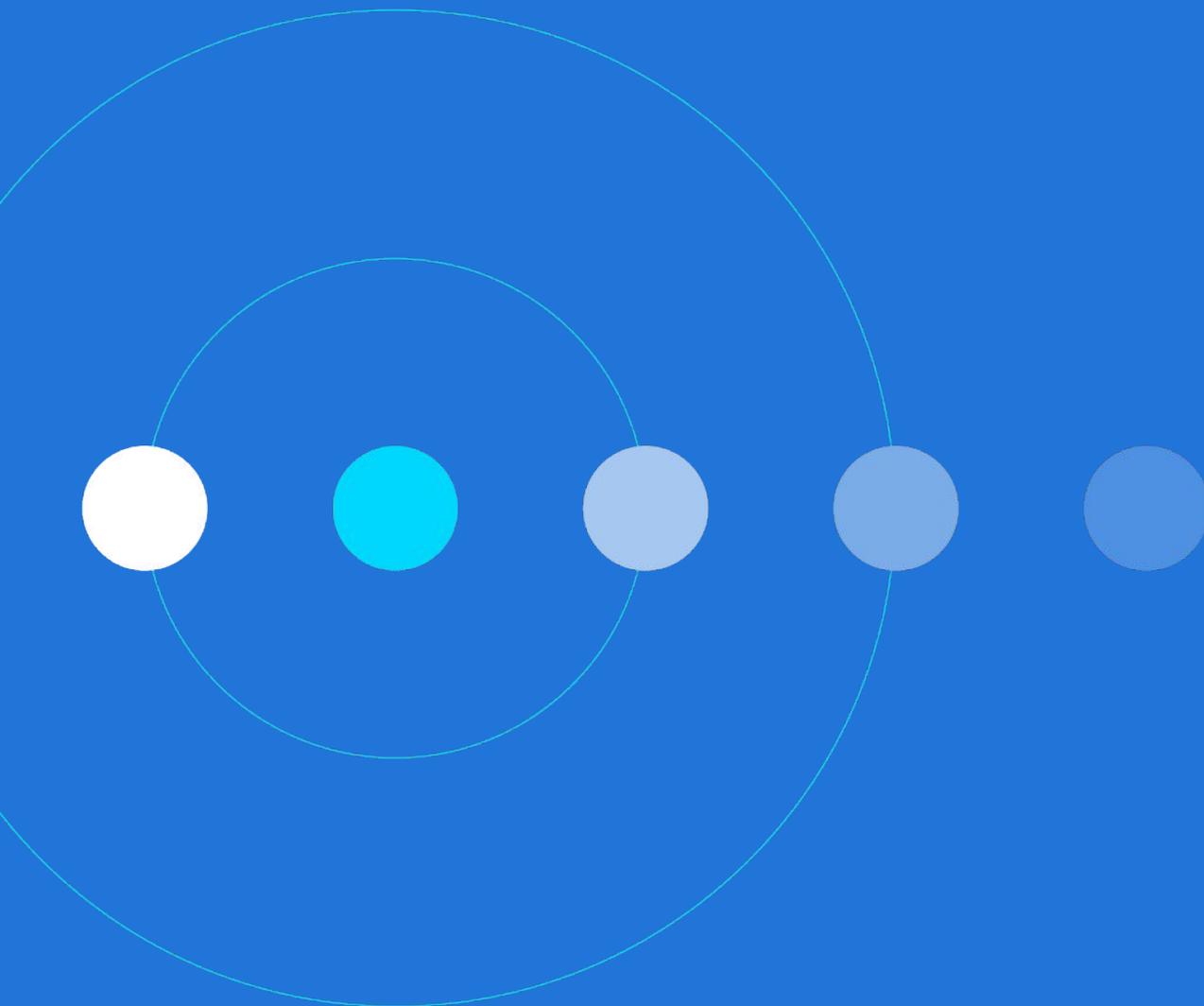
may 2025

randstad employer brand research.

global report 2025

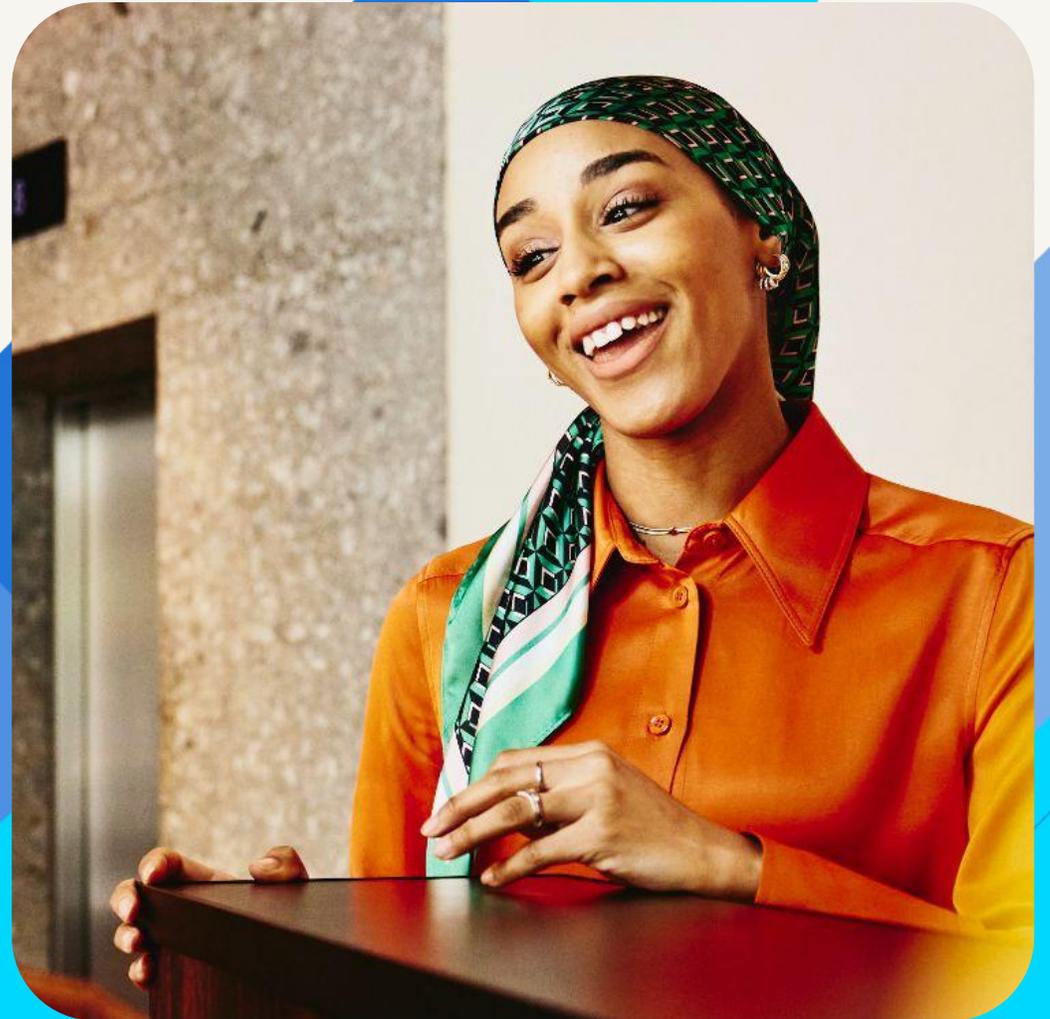


partner for talent.



- 3 introduction
- 7 executive summary
- 13 key drivers
- 17 job-switching behaviour
- 23 equity
- 28 motivation & engagement

introduction.





navigating the future of work.

adapting employer branding in a changing workforce

Global working trends are undergoing significant transformation due to societal changes and a dynamic labor market. The rapid advancement of AI technologies is reshaping how work is structured and approached. Additionally, a new generation of workers is entering the workforce with different priorities and motivations, further influencing the employment landscape.

While global trends provide a broad overview, regional-specific differences continue to emerge, making it crucial for employers to tailor their strategies to local needs. Understanding regional variations in employee preferences is essential for developing offerings that resonate with diverse workforces. Workers across different specializations—whether digital, operational, or professional—hold distinct priorities, highlighting the need for a personalized approach.

In today's competitive labor market, aligning the employee value proposition with the evolving expectations of today's workforce is more important than ever. A deep understanding of employee motivations allows companies to craft targeted policies and practices designed to attract and retain top talent. By focusing on what matters most to employees, employers can strengthen their position as an employer of choice and enhance their long-term competitiveness.

what is the randstad employer brand research?

- a representative employer brand research based on perceptions of the general audience. Optimizing 25 years of successful employer branding insights.
- an independent survey with more than 170,000 respondents and 6,400 companies surveyed worldwide.
- a reflection of employer attractiveness for this market's largest employers known by at least 15% of the population.
- Provides valuable insights to help employers shape their employer brand.

170,000
respondents



34 markets surveyed.

covering more than 75% of the global economy

sample

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

fieldwork

- online interviews
- december 2024 - february 2025

length of interview

- 14 minutes

global sample

- 171.191



argentina
australia
austria
belgium
brazil
canada
denmark

chile
china
czech republic
france
germany
greece
hong kong SAR

hungary
india
italy
japan
luxembourg
malaysia
mexico

the netherlands
new zealand
norway
poland
portugal
romania
singapore

spain
sweden
switzerland
united kingdom
united states
uruguay

executive summary.



worker top priorities remain consistent.

- **top priorities:** Salary and work-life balance remain top global priorities, but expectations are evolving. Gen Z values well-being as much as pay, signaling a shift in what attracts and retains emerging talent.
- **talent priorities differ significantly by generation, region, and job type:** Older workers prioritize stability and environment, while younger and digital employees seek career progression and flexibility. When looking at job types by region, further differences emerge, indicating that both job role and location shape what employees value most in an employer.
- **strength in job security:** This aspect continues to have the highest satisfaction rating globally. Yet, a large expectation gap remains on salary, especially in Europe, highlighting a disconnect between employer offerings and employee priorities.

recommendations:

- **bridge the gap with non-material benefits:** Employers should focus on enhancing work-life balance and improving the work atmosphere. These efforts can significantly boost employee satisfaction and retention in the short term with minimal financial impact.
- **develop tailored retention strategies:** Utilize data-driven insights to create targeted retention plans that address the unique needs and expectations of various demographic groups, taking into account regional and demographic differences in EVP drivers.





actual job turnover globally stabilizes.

- **stability in global job switching trends:** Job switching rates in the last six months of 2024 remained consistent with the same period the previous year. There was a marginal decrease in job-switching intent for the first half of 2025, marking the first decline in five years. While the overall trend suggests growing workforce stability, Gen Z and the operational specialization continue to show higher rates of actual job switching, with North America driving the most activity globally.
- **key motivations for job change:** Work-life balance extends its lead over low compensation as the top reason employees consider leaving their jobs. While salary remains the key driver, the widening gap suggests that work-life balance may be more critical to retention than previously thought.
- **reskilling as a strategic priority:** It is especially important among younger workers and those seeking job changes. Gen Z and employees exploring internal mobility place the highest value on reskilling, underlining its critical role in both retention and career development efforts.

recommendations

- **tailor retention strategies by job type and region:** Prioritize work-life balance improvements and flexible working for professionals and digital workers, and focus on competitive compensation for older employees and European talent.
- **strengthen internal mobility programs while strengthening your EVP:** By focusing on improving the top two drivers, competitive salary and work-life balance, and by offering clear growth opportunities within the organization, employers can improve retention and attract top talent.

navigating AI workplace adoption.

artificial intelligence

- **growing adoption:** Over one-third of employees globally are using artificial intelligence (AI) regularly in the workplace, with the Asia-Pacific (APAC) region experiencing a 10% increase compared to the previous year and now leading the way in AI adoption (47%), while Europe lags behind with just 18%.
- **demographic trends and diverse outlooks:** Gen Z and Millennials are more likely to use AI and anticipate its future impact. Over 50% of workers globally view AI's impact on job satisfaction positively, while over one-third remains neutral.
- **enthusiasm gap:** Europeans are the most skeptical about AI, with 15% expressing a negative view—nearly twice the global average. In contrast, LATAM stands out as the most positive region, with 70% holding a favorable opinion.

recommendations

- **educate and engage:** Develop comprehensive AI training programs to engage neutral or hesitant employees, showcasing the benefits and positive experiences of current AI users.
- **regional strategies:** Tailor AI implementation strategies to address regional disparities, focusing on building optimism in Europe, while employers in LATAM should capitalize on the already positive sentiment.





advancing equity in the workplace.

equity

- **emergence of equity as a key driver:** Equity has firmly established itself as a top-five driver of employer attractiveness, with particular resonance among Gen Z. This points to a growing expectation for fairness, inclusivity, and equal opportunity.
- **minority identification:** 32% of respondents self-identify as a minority, with identification higher among Gen Z and employees in North America. This highlights the increasing diversity in the workforce and the need for employers to ensure that their equity efforts are not only visible but also meaningful and inclusive.
- **employer performance:** Globally, employers are performing well when it comes to equity, though Europeans tend to be slightly more critical, while North Americans are the most positive about their current employer's efforts. The most notable improvement is in employees' perception of fairness from senior management, particularly in hiring and career advancement decisions.

recommendations

- **enhance equity initiatives:** Implement and prioritize equity-focused programs to ensure that all employees, regardless of their background and personal preference, receive fair and optimal opportunities for growth and development.

motivation and engagement.

most important differences to take into account

- **current motivation:** 72% of employees feeling engaged in their current roles. More than half report being more motivated than a year ago, with APAC showing the greatest increase—highlighting a positive shift in engagement levels.
- **key drivers of motivation:** Strong work-life balance, one of employees' top priorities, is also a key driver of engagement. In contrast, it plays a smaller role in disengagement, where the desire for a higher salary stands out as the leading factor. Generational differences are minimal, indicating that motivations and reasons for disengagement are broadly consistent across generations worldwide.

recommendations

- **prioritise work-life balance and keep in mind attractive salary and benefits:** To sustain and enhance engagement, employers should prioritize flexible work arrangements, while also ensuring competitive salaries and appealing benefits that meet the expectations of a diverse workforce.
- **monitor engagement shifts over time:** Use engagement trends to stay ahead of potential dips in motivation. Since engagement is often closely tied to retention, focusing on the factors that drive motivation—such as work-life balance, feeling valued, and improving relationships with colleagues and management —can significantly strengthen retention efforts over time.



key drivers.



top five reasons employees choose an employer.



1. salary & benefits

An attractive salary remains the most influential driver of job choice globally, cutting across all demographics. While it holds equal importance for both Gen X and Baby Boomers, the emphasis slightly declines among younger generations.



2. work-life balance

Work-life balance still ranks as the second most important job driver globally. For Gen Z, it holds equal importance to salary, highlighting a shift toward valuing personal well-being alongside financial reward. Professional talent place the greatest emphasis on work-life balance.



3. job security

Job security remains the third most important driver globally. Gen X values it more than any other generation, reflecting a stronger desire for stability. Among specializations, professional and operational talent place similar importance on job security, while digital talent consider it less of a priority.



4. pleasant work atmosphere

Pleasant work atmosphere remains the fourth most important driver overall. It is valued more highly by older generations, with its importance gradually declining among younger workers. For digital talent however, it falls outside the top five drivers — replaced instead by career progression opportunities, which take higher priority in this group.



5. equity

Equity, introduced as a new driver last year, has firmly established itself as a key component of the ideal employer profile. It resonates particularly strongly with Gen Z, who place significantly greater value on it than other generations.

Q. Thinking about your ideal employer, please pick those elements that this organization should most definitely have?

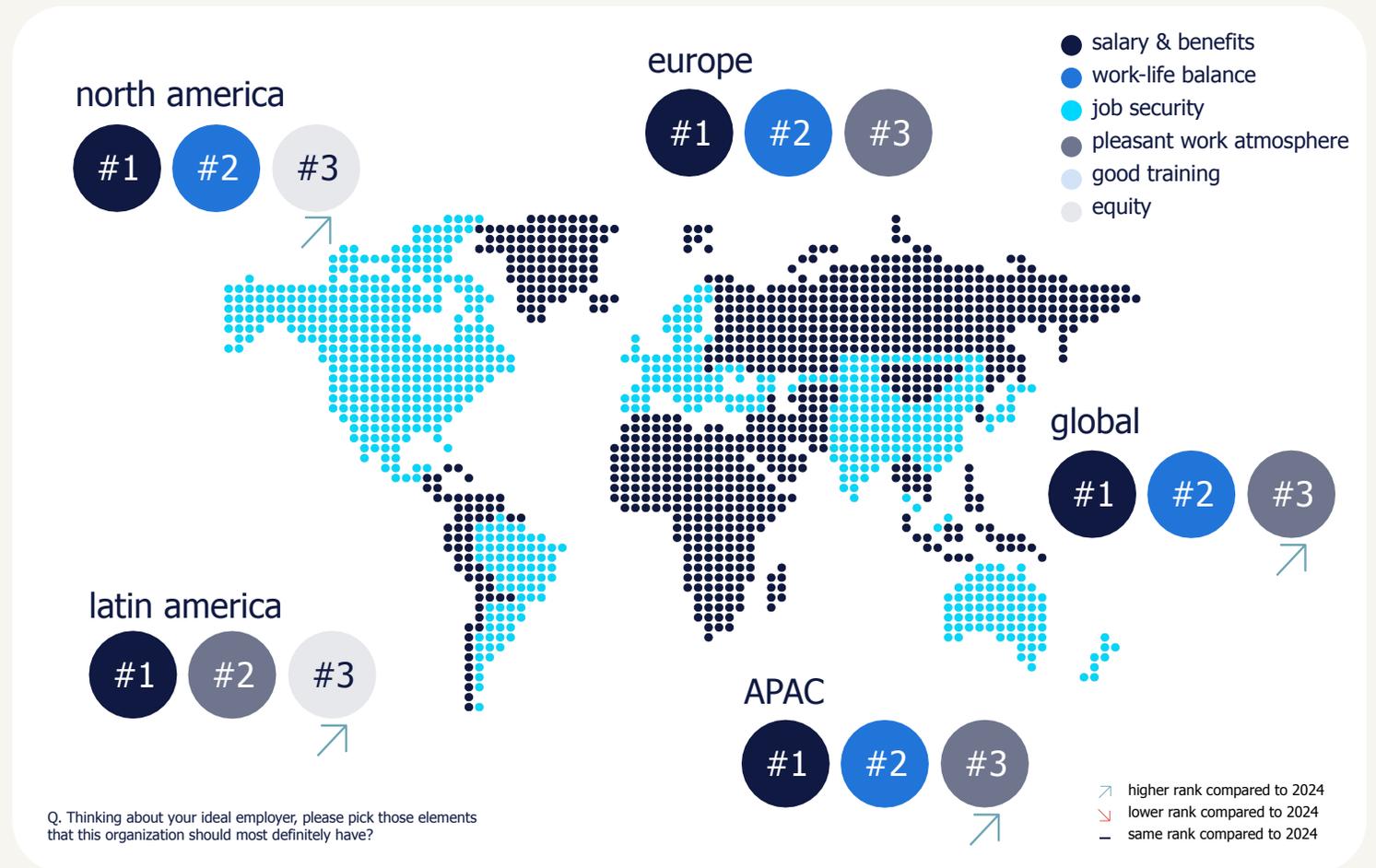


salary is the most important driver across all regions, but other drivers differ.

Work-life balance ranks as the second most important driver across all regions, with the exception of Latin America, where it falls outside the top three priorities.

Europe and APAC share similar top priorities; however, Europeans place significantly greater emphasis on salary compared to other drivers, while in APAC, salary and work-life balance are valued almost equally.

Equity appears in the top three for North America, but it stands out most strongly in Latin America, where it receives the highest emphasis among all regions.



both job role and location influence what defines an ideal employer.

as highlighted by differences in drivers across specializations and regions

north america	latin america	europa	APAC
<ul style="list-style-type: none"> 1. work-life balance 2. salary and benefits 3. long-term job security 	<ul style="list-style-type: none"> 1. salary and benefits 2. career progression 3. pleasant work atmosphere 	<ul style="list-style-type: none"> 1. salary and benefits 2. job security 3. pleasant work atmosphere 	<ul style="list-style-type: none"> 1. salary and benefits 2. job security 3. work-life balance
<ul style="list-style-type: none"> 1. good reputation 2. work-life balance 3. salary and benefits 	<ul style="list-style-type: none"> 1. salary and benefits 2. pleasant work atmosphere 3. job security 	<ul style="list-style-type: none"> 1. salary and benefits 2. work-life balance 3. work remotely/from home 	<ul style="list-style-type: none"> 1. salary and benefits 2. career progression 3. strong leadership
<ul style="list-style-type: none"> 1. salary and benefits 2. good training 3. work-life balance 	<ul style="list-style-type: none"> 1. salary and benefits 2. career progression 3. pleasant work atmosphere 	<ul style="list-style-type: none"> 1. salary and benefits 2. work-life balance 3. pleasant work atmosphere 	<ul style="list-style-type: none"> 1. salary and benefits 2. work-life balance 3. job security

Q. Thinking about your ideal employer, please pick those elements that this organization should most definitely have?

● operational ● digital ● professional



how employees rate their current employer.

three-quarters of employees view their employer's job security offerings positively.

It is the highest-rated driver globally in employer evaluations. Younger generations are generally more positive about this aspect, although they place less emphasis on it compared to older generations when defining their ideal employer — highlighting a generational difference between perception and priority. In fact, younger workers are generally more positive across most drivers — suggesting a more optimistic outlook on what their employers offer.

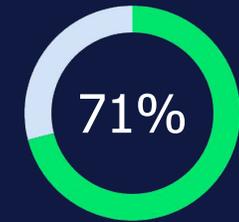
Digital talent are more positive about their employer's financial health over job security. Though, similar to younger employees, they consistently rate their employers more favorably than operational or professional talent, highlighting a notable gap in perception between specializations.

the largest expectation gap continues to be around attractive salary.

Despite being a top priority for workers, salary ranks only 8th in employer evaluations. This disconnect is especially pronounced in Europe, where employees place high importance on salary but are more critical of how well their employers deliver on it.

In contrast, employees in APAC report significantly higher satisfaction with salary and benefits. This may indicate that employers in the region are offering more competitive compensation packages—or that employee expectations around pay are different, even though salary remains a top global priority.

Q. How would you rate your own employer on each of the attributes below, on a scale from 1 (not at all true) to 5 (completely true)?



operational



professional



digital

rate their employer positively on financial health.

job-switching behaviour in focus.



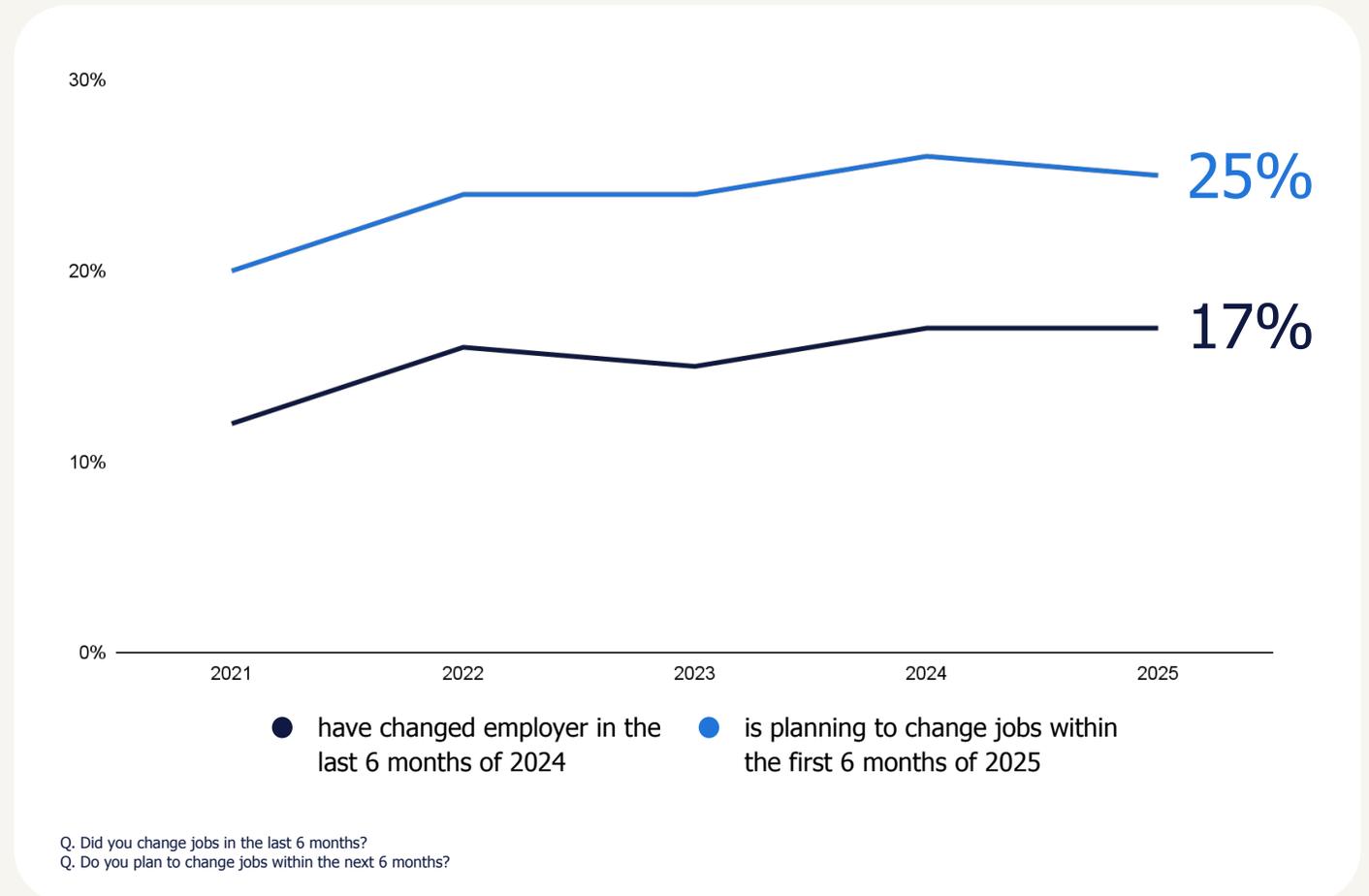
actual job switching remains stable compared to previous year.

while intention to switch jobs in the first half of 2025 has decreased by 1%

This a marginal drop, but marks the first decline in job-switching intention in the past five years.

Operational talent globally have significantly higher actual job -switching rates (19%) compared to professional (17%) and digital employees (8%). Interestingly, intent to switch is similar between operational (26%) and professional (25%) talent, suggesting that professionals may be feeling more cautious or restrained despite similar restlessness.

Generationally, Gen Z shows the strongest intention to switch, though even here intent has dipped from 35% last year to 30% this year — pointing to growing contentment or stability. Gen Z also leads in actual switching, overtaking Millennials, whose switching rate has fallen to match the global average of 17% (down 5% from last year).

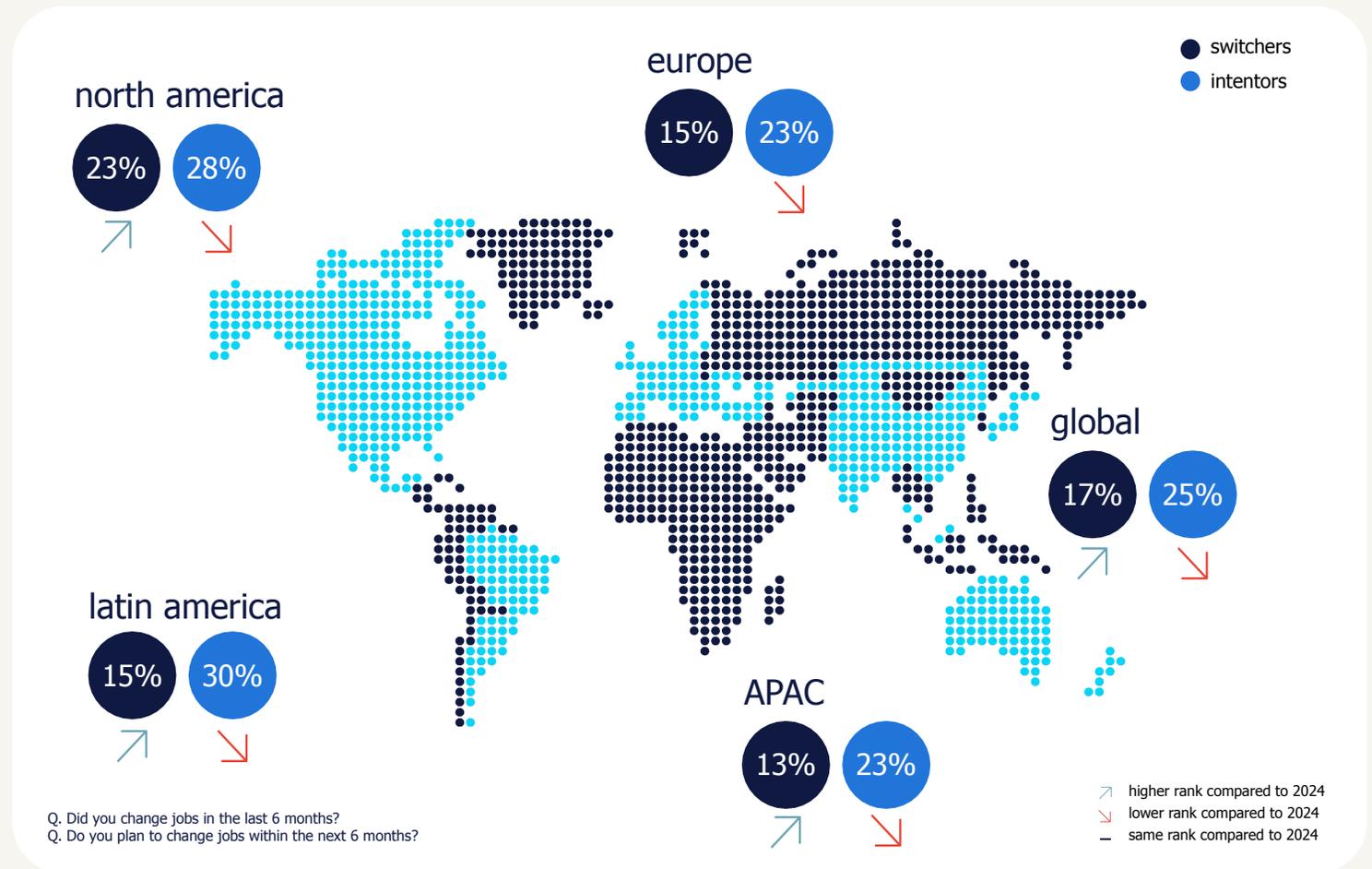


north america is driving global job switching.

with actual switching rates increasing slightly (+1%) compared to last year

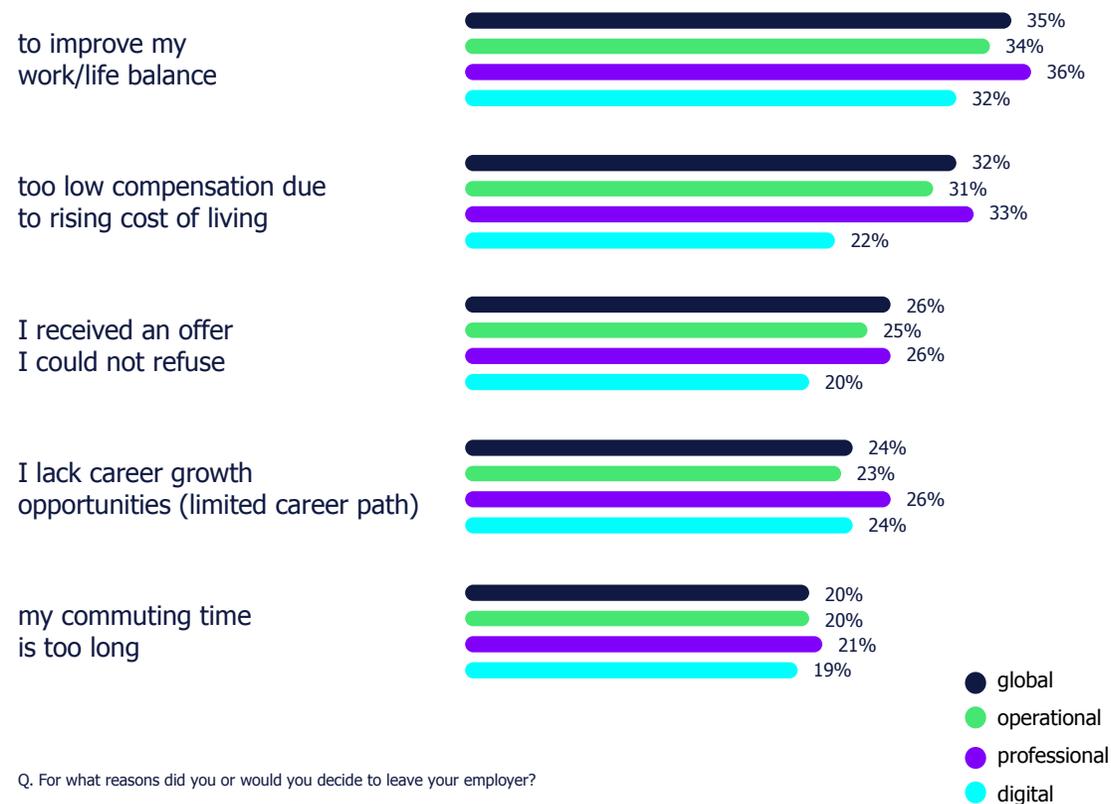
This signals a particularly active talent market in the region. In contrast, APAC shows the lowest external job-switching rates, yet interestingly leads with the highest rate of internal switching suggesting that while employees in APAC may be less inclined to leave their companies, they are actively seeking new opportunities and growth within their organizations.

Meanwhile, Latin America stands out with the highest job-switching intent globally, creating the largest gap between intention and actual switching. This points to either unmet expectations, barriers to mobility, or possible retention strategies that are keeping employees in place despite their desire to move.



improving work-life balance remains the top reason employees would consider leaving their current employer.

reasons for leaving



This driver widens its lead over low compensation, which dropped 3% from last year. This priority is strongest among professional talent but remains the top motivator across all specializations. For digital talent, while fewer cite it, the gap between this and the next reason is especially wide, making it their standout driver.

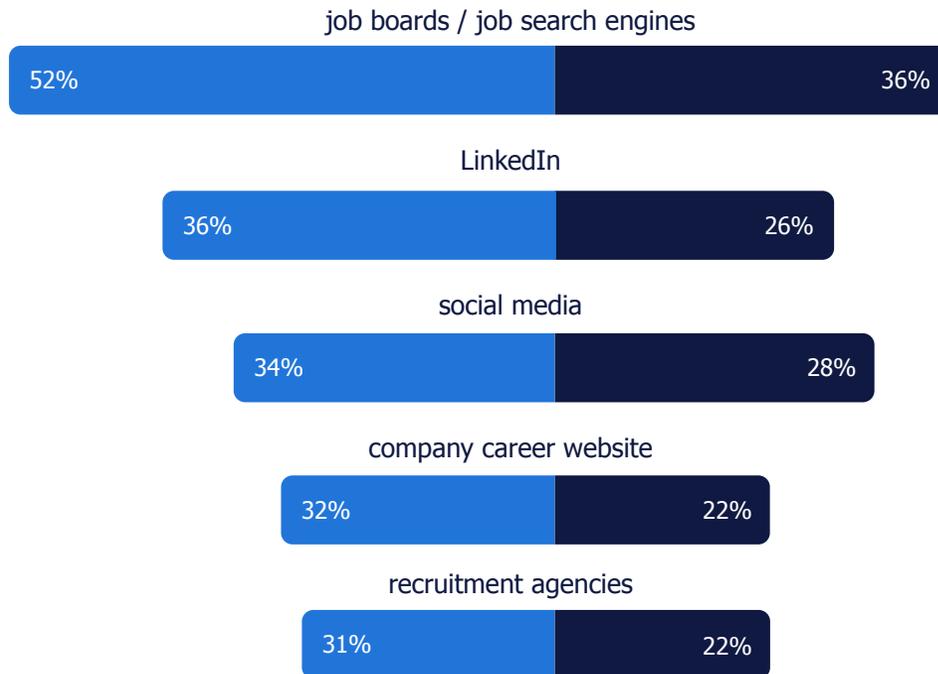
Low compensation becomes a stronger motivator with age, ranking highest for Gen X and Baby Boomers, while younger generations place less emphasis on it.

Regionally, low compensation is the top reason to leave in Europe, while work-life balance leads in other regions. In fact in North America, receiving an irresistible offer is a stronger motivator than too low compensation.

job boards have the highest reach among job seekers.

sources for job opportunities

- planning to change
- changed employer



Q. Through which of the following job search channels have you used to look for a job?
Q. Through which of the following job search channels did you find a job?

Although job boards / job search engines are popular among all job seekers, the usage of these platforms decreases with age. They continue to be used more widely in APAC (60%), while a notably lower proportion of workers in Europe utilizes them (46%). Among those who switched jobs in the last six months of 2024, Millennials and workers in APAC were the most likely to have found success through job boards.

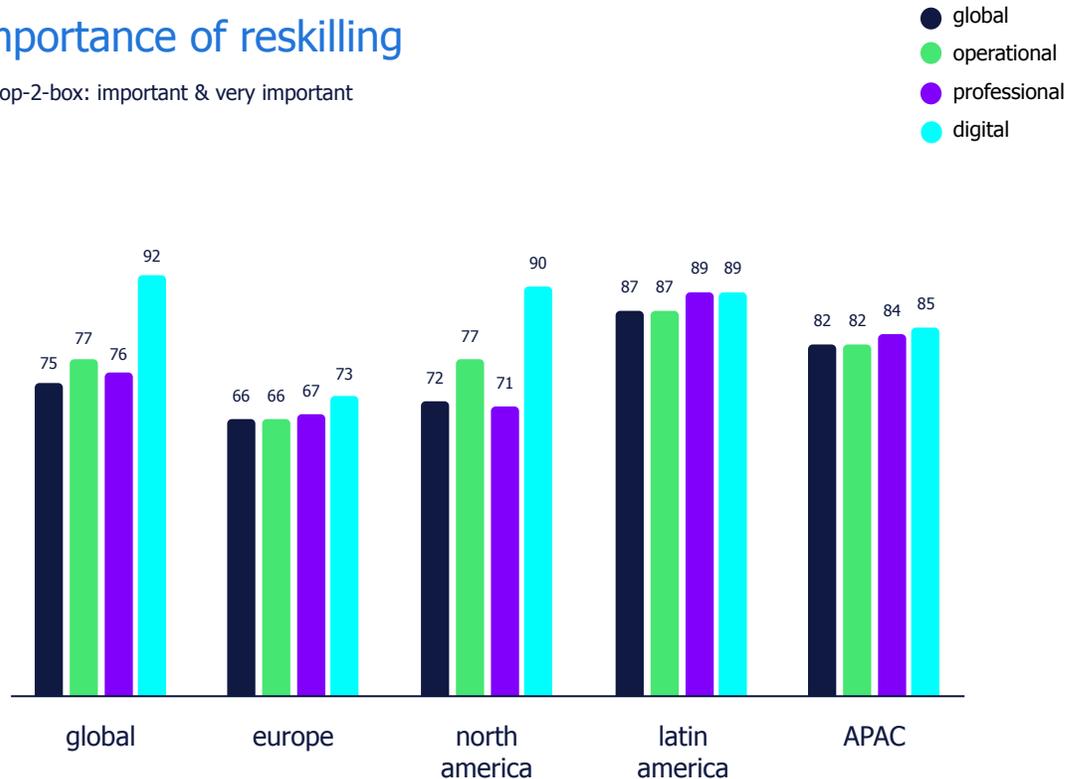
Social media, on the other hand, is increasingly popular among Gen Z in their job searches, with usage tapering off as workers age. It is also particularly popular in Latin America, where social media is a more common tool for job seekers compared to other regions.

globally, reskilling is important to 75% of workers.

with the highest importance seen in latin america and the lowest in europe

importance of reskilling

% top-2-box: important & very important



Q. How important is it for you that your employer offers you to reskill yourself (learning skills of a different job) to further your career progression?

In regions where reskilling is highly valued, such as Latin America, the importance remains relatively consistent across operational, professional, and digital specializations. However, in regions where reskilling is less emphasized — like North America — notable differences emerge across roles, with digital talent placing the most importance on reskilling, followed by operational and then professional talent.

Generationally, Gen Z places the highest importance on reskilling (79%), with the perceived importance decreasing steadily with age. Furthermore, talent looking to switch jobs internally value reskilling the most (82%), followed by those planning external moves (80%), while those not looking to make a switch rate it significantly lower (71%). This highlights that reskilling is closely tied to workers' ambitions for change and advancement, whether within or outside their current organization, underlining its strategic importance for both retention and talent development.

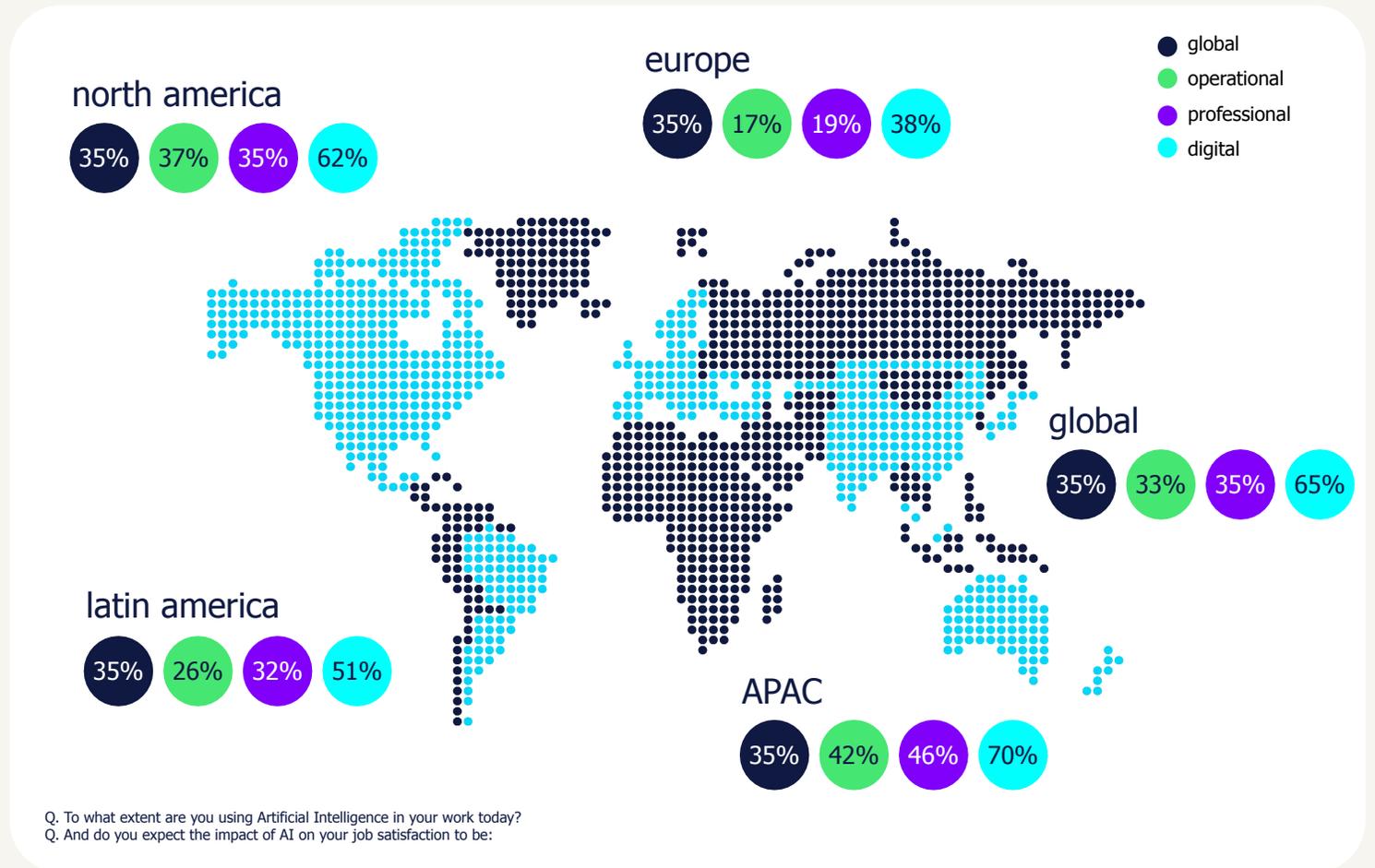


regular usage of AI has increased globally.

with digital workers being at the forefront of AI integration

65% of digital workers are using AI regularly — nearly double the 34% average for operational and professional roles. Regular usage is rising across all regions, with the most significant growth in APAC compared to last year (+10%), and it remains the highest regular usage globally. In contrast, Europe lags behind, with just 18% using AI regularly and over just over half have never used AI in the workplace.

Gen Z are also leading global trends in AI adoption, with 43% using AI regularly in their work, with usage declining with age. In fact, only 20% of Gen Z workers globally have never used AI at work, compared to 60% of Baby Boomers. Gen Z has also seen the sharpest rise in regular usage compared to other generations. Last year, both Gen Z and Millennials reported 34% regular usage. Since then, Gen Z's usage has jumped by 10%, while Millennials have seen a smaller increase of just 4%.



overall sentiment toward AI continues to improve.

with positive views having risen slightly to 53% (+2%)

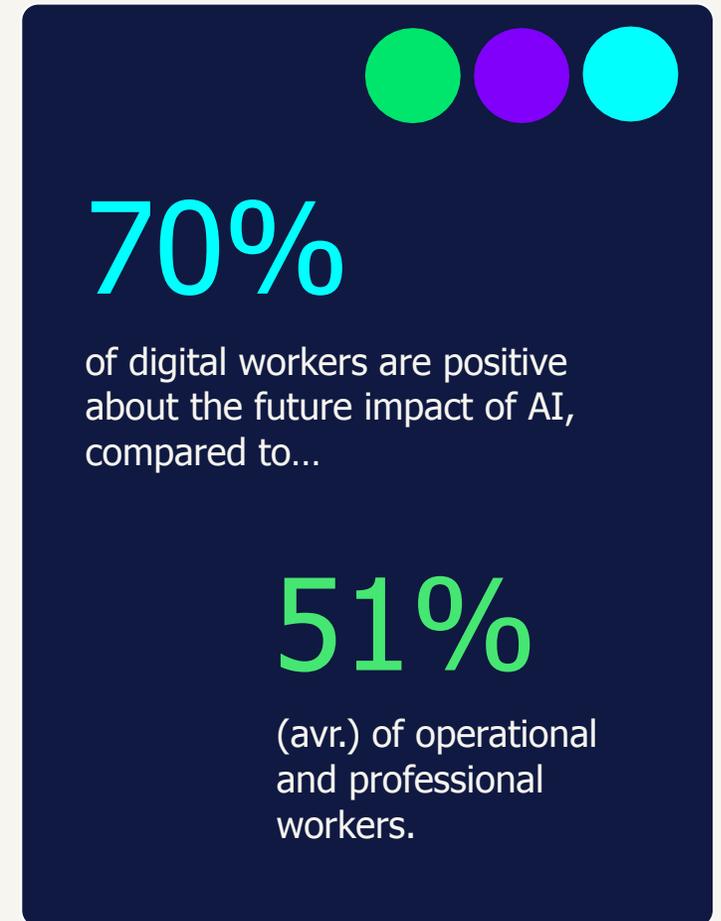
While digital workers have the highest rates of AI usage, attitudes toward AI's future impact remain relatively consistent across job types.

The one notable difference is among operational staff, where 7% believe they are at risk of losing their jobs to AI—higher than both digital (4%) and professional workers (5%). This indicates a greater sense of uncertainty or anxiety about AI among operational roles.

Generational perceptions of AI's current impact reflect existing usage patterns. Gen Z leads again, with 11% already seeing AI make a difference in their roles, and this perception declines with age. In contrast, Baby Boomers are the most likely to say AI will have no impact on their work. This may reflect both the nature of their roles but also their lower engagement with AI tools, which could limit their awareness of its potential.

with this positive shift in sentiment toward AI, there is a clear opportunity for employers to reinforce this growing optimism.

Interestingly, this shift appears to come from those previously neutral, as the share of negative responses has remained steady—suggesting a growing optimism among previously undecided workers. Latin America remains the most enthusiastic about AI's future impact, with 70% expressing a positive view. However, the largest year-over-year increase in positivity was seen in APAC (+3%). Digital workers are also the most optimistic group, matching Latin America's 70% positivity rate.



Q. And do you expect the impact of AI on your job satisfaction to be:

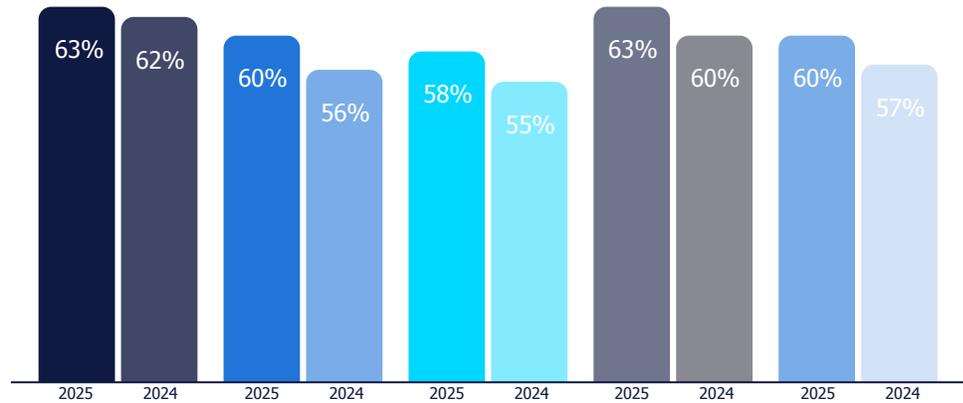


annual topics: equity.



employers have improved across all equity-related statements, building on an already strong performance in this area.

which of the following statements do you consider to be true for your current employer?



- my unique attributes, characteristics, skills, experience and background are valued in my organisation
- senior managers are fair when it comes to hiring or career advancements of those that report into them
- at my organisation, the best opportunities go to the most deserving employees
- my organisation provides equal pay for equal work
- senior managers are fair when it comes to reskilling and upskilling opportunities of those that report into them

Q. How would you rate your own employer on each of the attributes below, on a scale from 1 (not at all true) to 5 (completely true)?

When assessing their current employer on equity, three in five employees give a positive rating—an encouraging result supported by consistently strong scores across specific equity measures.

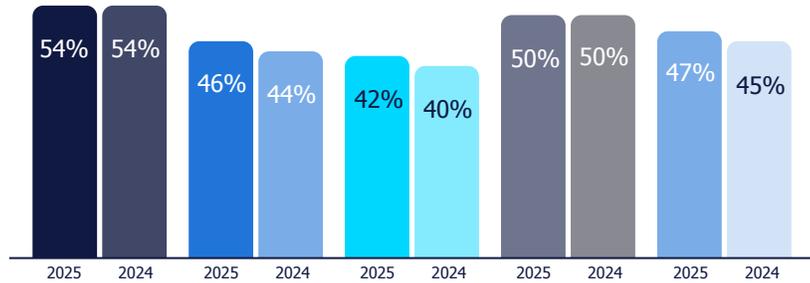
Employers receive their highest scores in areas such as equal pay for equal work and the recognition of unique individual attributes within the organization.

The most significant improvement compared to the previous year is in employees' perceptions of fairness by senior managers in hiring and career advancement decisions.

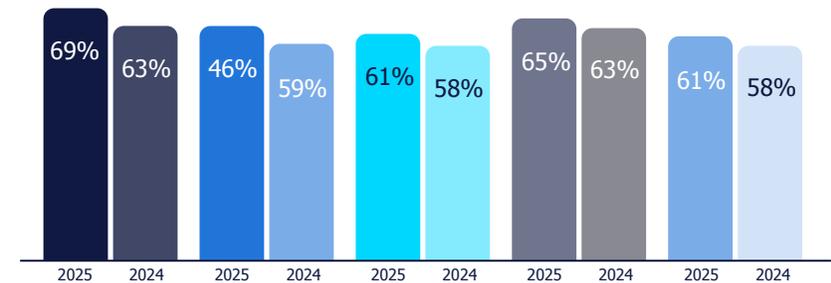
equity per region.

Europeans generally express the least satisfaction with equity in their current workplace, while North Americans tend to be more positive. Across the globe, the lowest-scoring item is the belief that the best opportunities go to the most deserving employees, while the highest-rated aspect is the recognition and value placed on unique attributes within the company.

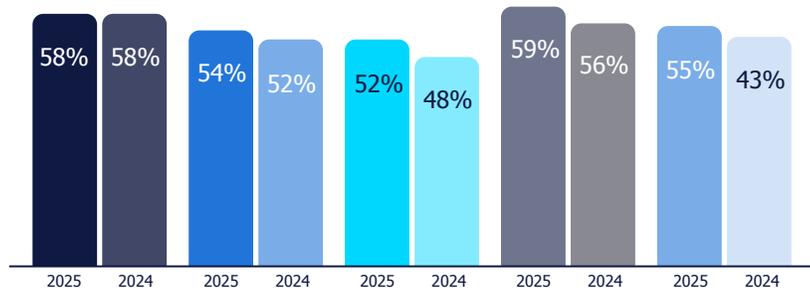
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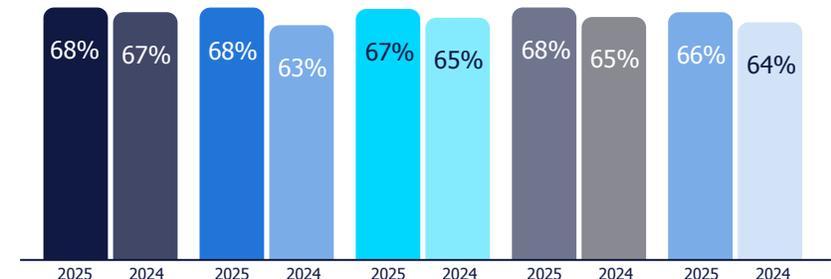
north america



latin america



APAC



- my unique attributes, characteristics, skills, experience and background are valued in my organisation
- senior managers are fair when it comes to hiring or career advancements of those that report into them
- at my organisation, the best opportunities go to the most deserving employees

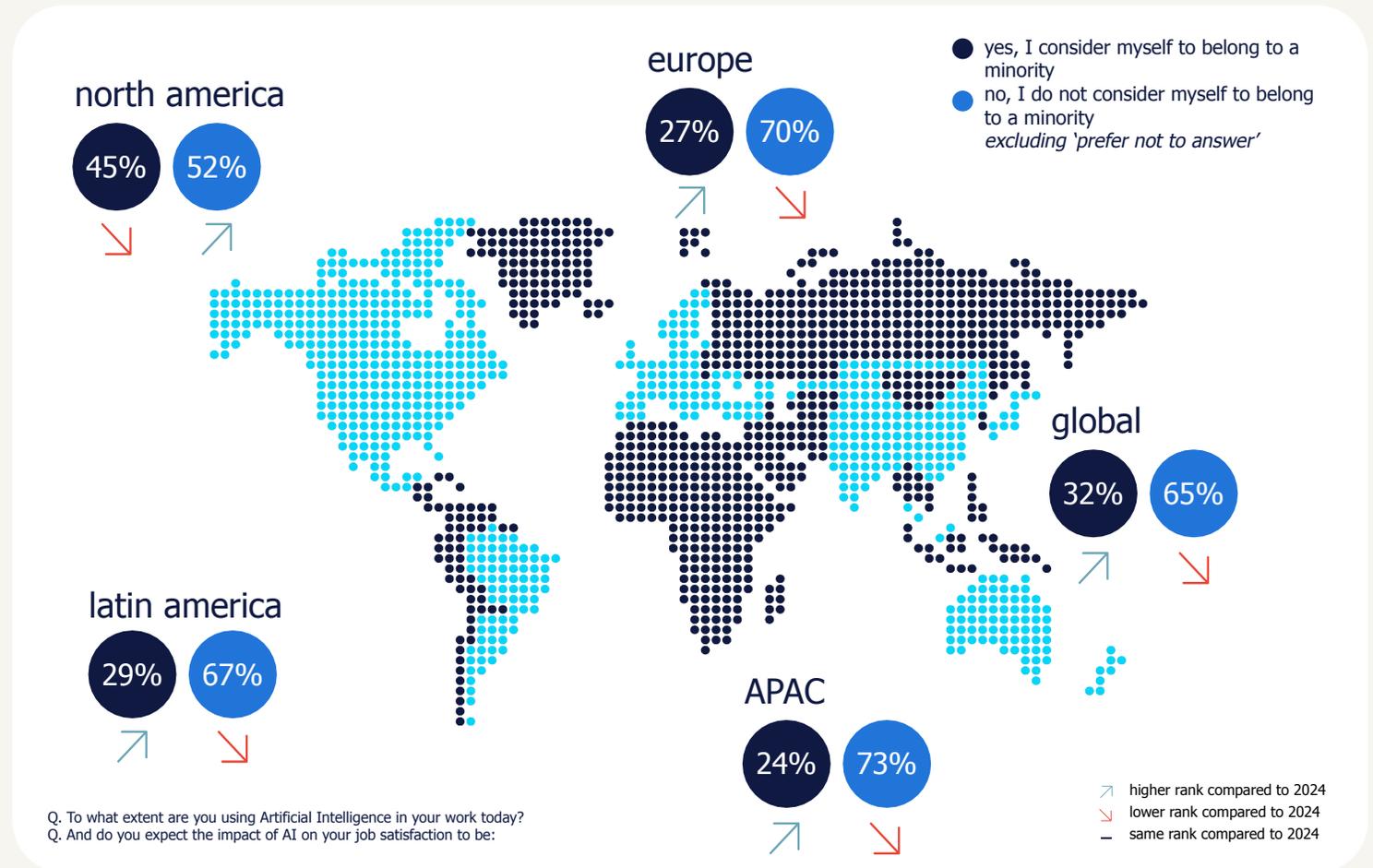
- my organisation provides equal pay for equal work
- senior managers are fair when it comes to reskilling and upskilling opportunities of those that report into them



nearly one in three people in the global workforce identify as a minority.

Although North America remains the region with the highest proportion of individuals identifying as minorities (45%), it is the only region where minority self-identification has declined, despite a global increase over the past year.

Globally, the most frequently cited forms of minority identification are related to ethnicity, race, or ancestry (13%), followed by gender identity (10%), underscoring the need for intersectional inclusion efforts, particularly in relation to race and gender. Generational differences persist: Gen Z is more likely to identify as a minority (41%) compared to older generations (avr. 27%).



there are only minimal differences in the perceptions of equity between minority and non-minority workers.

which of the following statements do you consider to be true for your current employer?

● minority
● non-minority

my unique attributes, characteristics, skills, experience and background are valued in my organisation



senior managers are fair when it comes to hiring or career advancements of those that report into them



at my organisation, the best opportunities go to the most deserving employees



my organisation provides equal pay for equal work



senior managers are fair when it comes to reskilling and upskilling opportunities of those that report into them

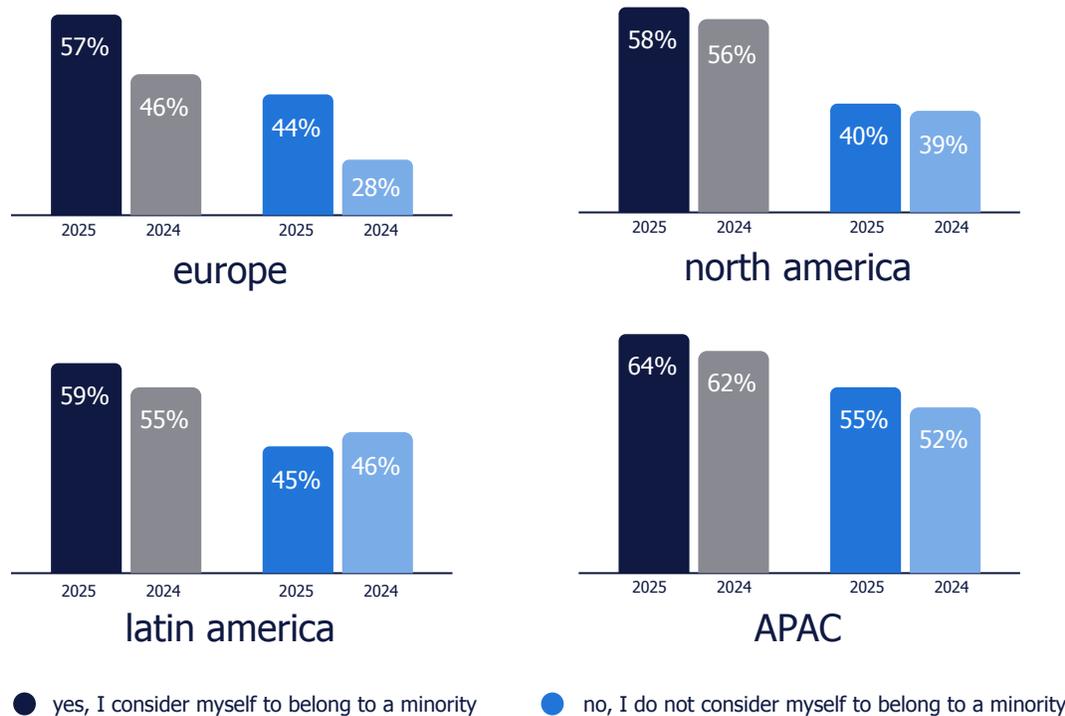


Q. How would you rate your own employer on each of the attributes below, on a scale from 1 (not at all true) to 5 (completely true)?
Q. Do you consider yourself to belong to a minority?

Perceptions of equity show minimal differences between minority and non-minority workers, indicating that both groups share similar views on fairness and inclusivity in the workplace.

minority-identifying workers are more likely to face obstacles tied to their identity compared to non-minority employees.

I have faced obstacles in my career progression in this organisation which I believe are due to who I am



In the APAC region, a higher proportion of minorities indicate they have encountered such obstacles in their career advancement. Europe experienced the largest increase, rising from 46% to 57%, with similar trends observed for non-minorities. It appears Europeans were previously more undecided but are now showing clearer views.

Generational differences remain globally, with younger generations, especially Gen Z (55%), consistently reporting obstacles based on their identities, while older generations, particularly Boomers (28%), report lower instances of such challenges.

annual topics:
motivation and
engagement.

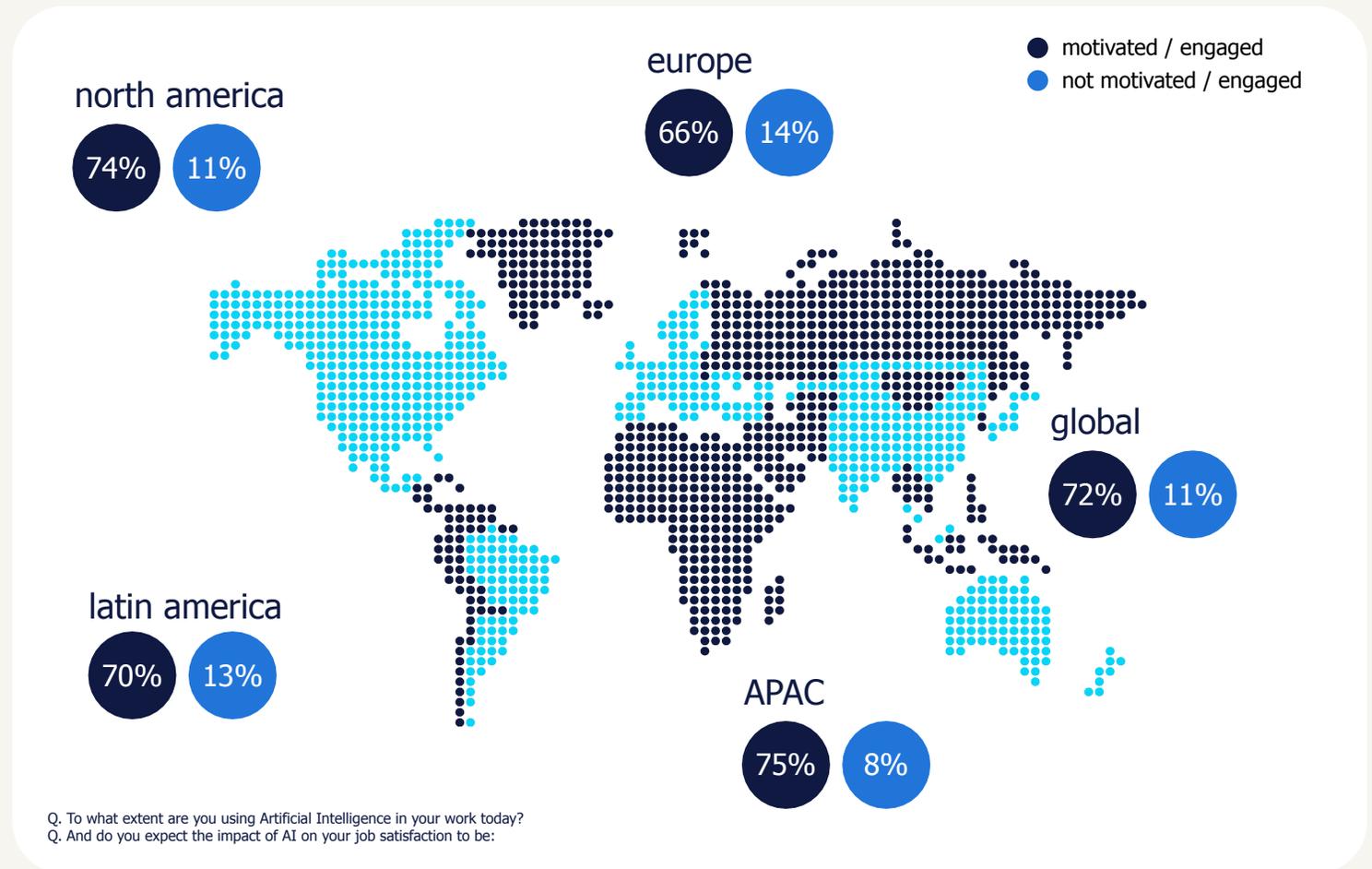


seven in ten workers globally feel engaged and motivated in their current role.

This indicates a generally high level of connection and enthusiasm among workers. Regionally, engagement remains largely consistent, with European employees showing lower motivation scores.

Younger generations report higher motivation (avg. 74%) compared to older generations (avg. 65%), a trend seen globally, except in LATAM, where the reverse is true.

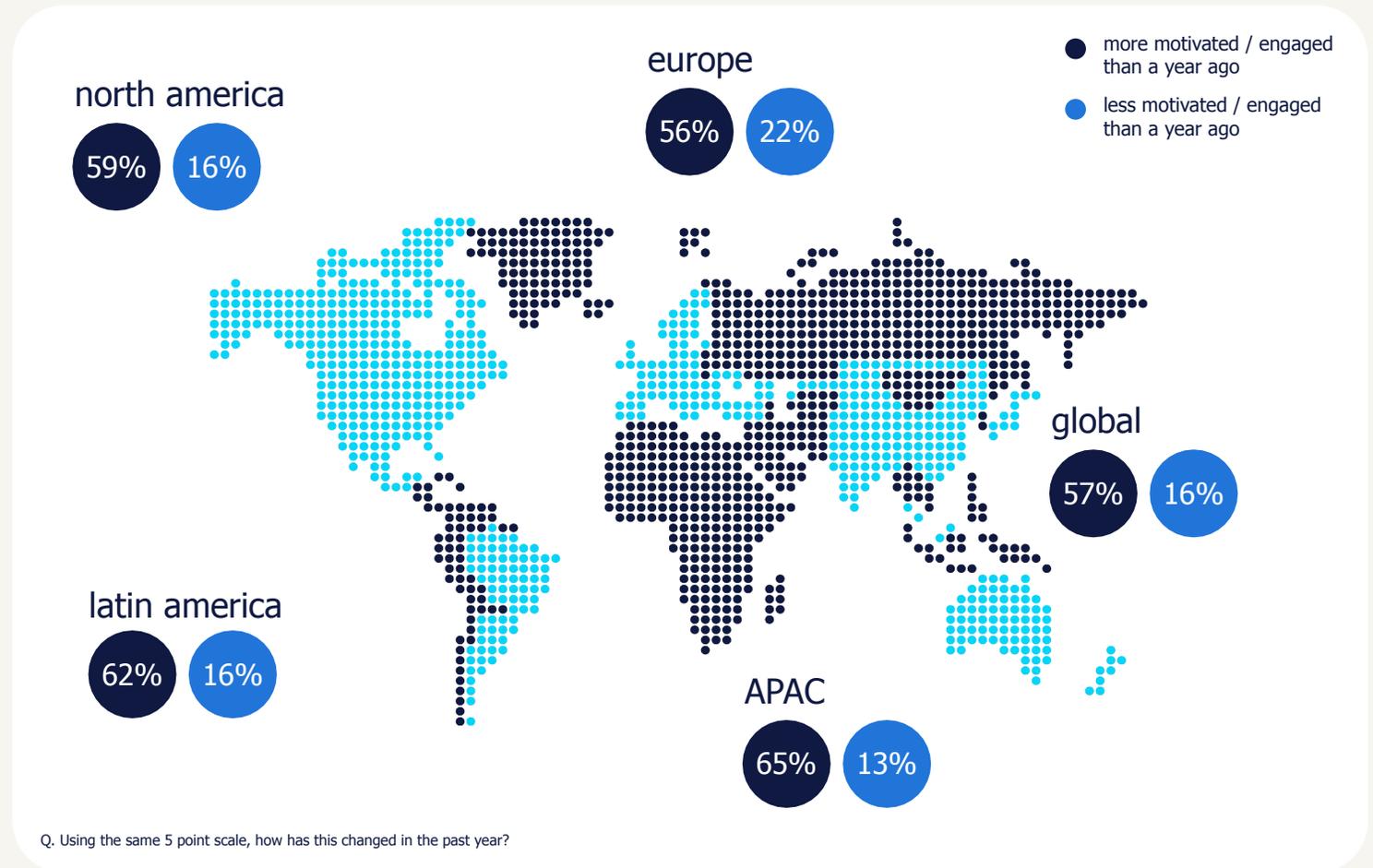
These insights highlight an opportunity for employers to enhance motivation among older generations, further strengthening overall workforce commitment despite solid engagement levels.



over half of the workforce feel more motivated and engaged than a year ago.

APAC has seen the largest boost in employee motivation over the past year, with 65% reporting increased drive, followed closely by Latin America at 62%. As reflected in the current employee engagement data, the European workforce has seen the largest decline compared to a year ago, with engagement now at 56% which could point to emerging challenges or shifts in workplace dynamics in that region.

Baby Boomers consistently report the lowest engagement levels, except in LATAM, where engagement is relatively consistent across generations (avg. 62%).

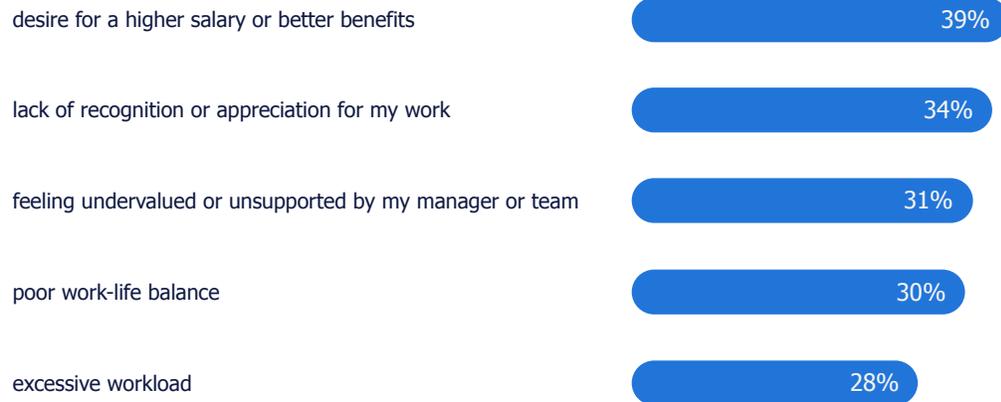


desire for higher salary is the top reason for low engagement.

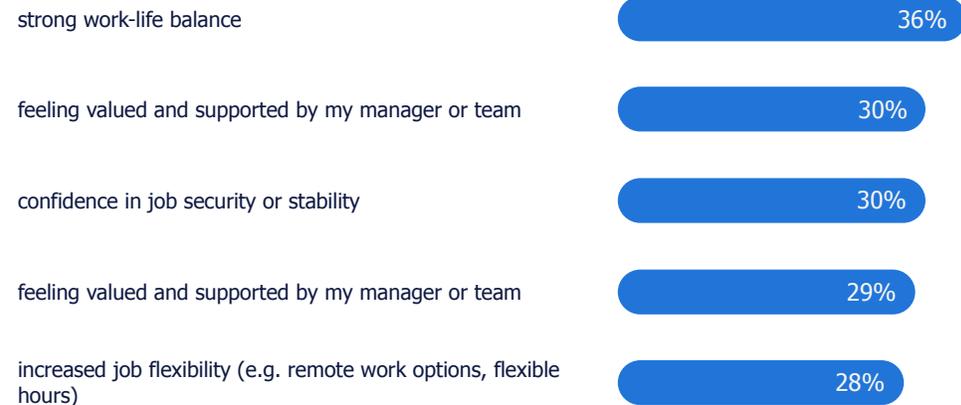
where-as strong work-life balance is crucial for motivation

Promoting a culture of strong work-life balance, along with appreciation and recognition, can significantly boost workplace morale and productivity.

less motivated & engaged



more motivated & engaged



Q. You have stated that you are less motivated / engaged than a year ago. Has this been influenced by any of the following factors?
Q. You have stated that you are more motivated / engaged than you were a year ago. Has this been influenced by any of the following factors?

motivation and engagement vary by role, but drivers of improvement stay aligned.

Across regions and specializations, motivation and engagement levels show distinct patterns. Digital employees stand out with the highest and most improved motivation, while operational and professional employees report similar engagement levels.

Salary remains the leading cause of disengagement across all groups. Secondary factors vary—operational and professional staff cite lack of recognition, whereas digital employees point to workload and limited growth opportunities.

Despite these differences, the drivers of increased engagement remain largely universal and aligned with global trends.



87%

of the digital workers feel motivated and engaged in their current role. With 3 out of every employees in digital roles, they also report the highest increased drive over the past year.

salary and benefits

is the main reason for less engagement and motivation across all job roles. But where professional and operational workers more often struggle with insufficient recognition and the feeling of being undervalued or unsupported, manageable workload is key to keep digital workers motivated.



closing remarks.

The report has shown the ongoing dynamism within the priorities and perspectives of the global workforce, while also pinpointing key areas where employers can enhance their strategies or focus their efforts.

It provides just a glimpse into the wealth of insights available through our Employer Brand Research, both globally and locally, and underscores the enduring importance of cultivating a strong employer brand in today's competitive landscape.

The data and additional insights into the specializations of professional, operational and digital realms delves further into the topics of AI adoption and inflation compensation in the face of rising living costs. These invaluable resources are readily accessible through our local market reports, and they seek to empower organizations to stay informed and stay ahead in an ever-evolving marketplace.



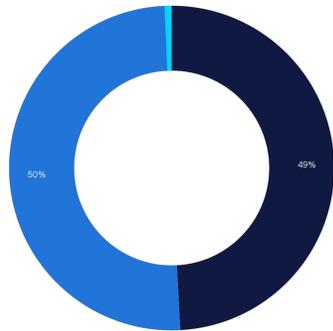
appendix.



sample composition in transport and logistics sector report.

socio-demographics, education, region

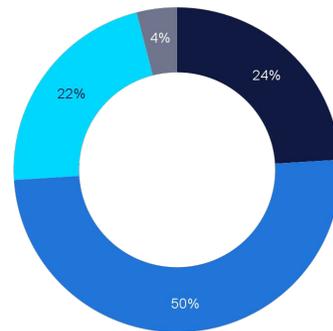
gender



- male
- female
- other*

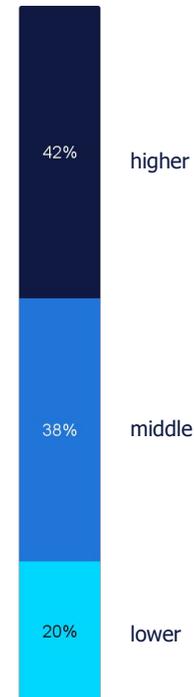
* other is comprised of all other gender identities and people who prefer not to answer the question

age

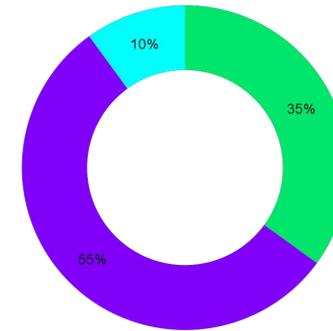


- Gen Z (1997-2012)
- Millennials (1981-1996)
- Gen X (1965-1980)
- Baby boomers (1946-1964)

education

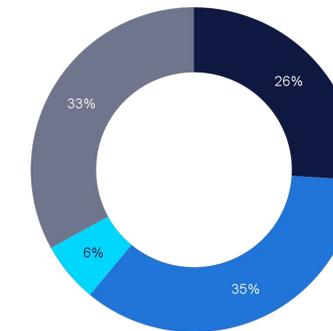


specialisations



- operational
- professional
- digital

region



- Europe
- North America
- Latin America
- APAC

thank
you.



partner for talent.