

AI IMAGE

employer brand research 2026

# healthcare sector report.



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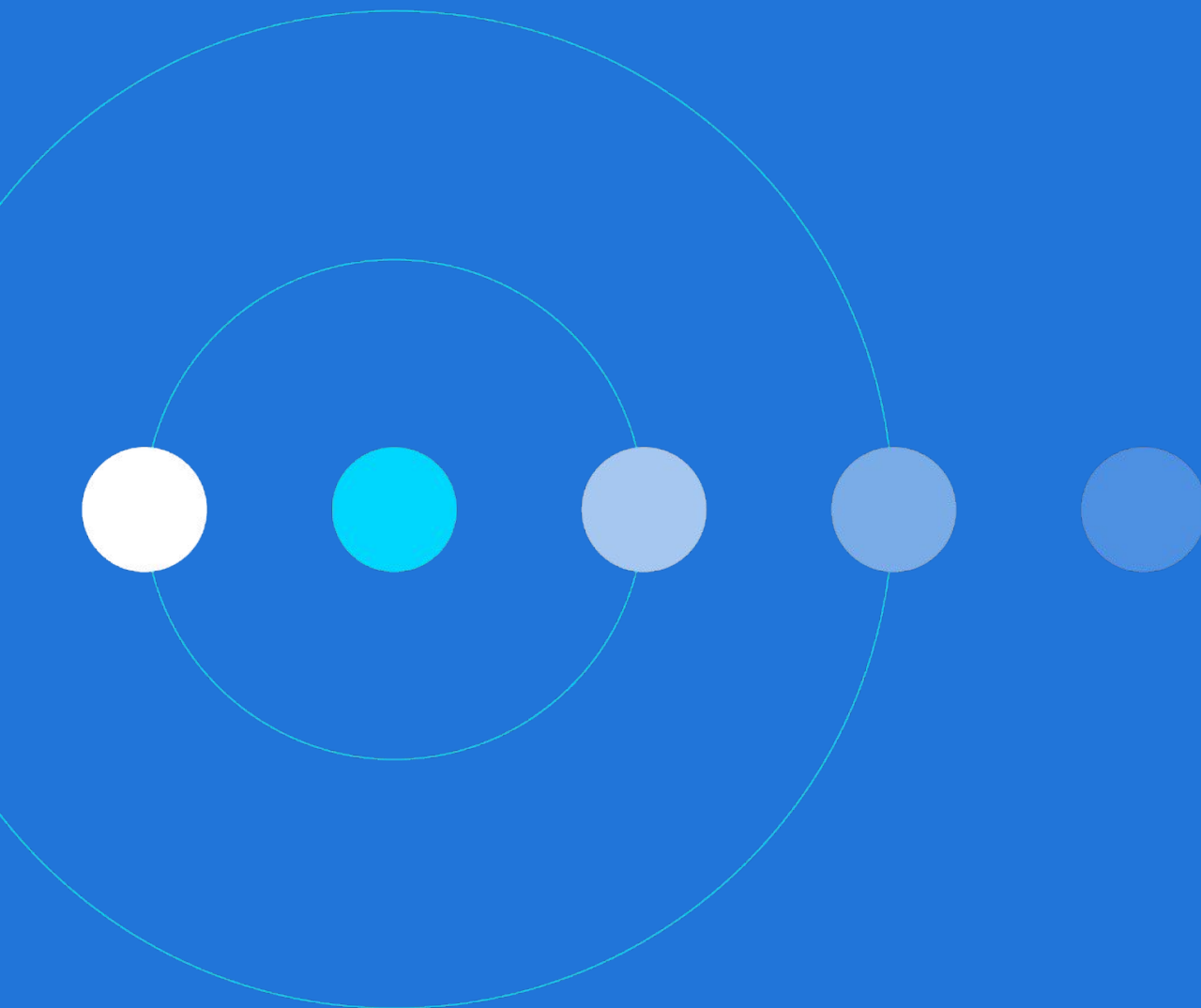
partner for talent.

# shaping the future workforce in the healthcare sector.

As global workforce dynamics continue to shift, talent in the healthcare sector is adapting to new realities. From the growing integration of AI and automation - reshaping daily work and perceptions of job security - to rising living costs driven by geopolitical tensions, professionals are navigating an increasingly complex world of work. At the same time, the entry of new generations is reshaping expectations around flexibility, purpose, and work-life balance.

In this evolving context, the healthcare sector faces a distinct set of challenges and opportunities. Regional differences shape what workers value most, while generational and role-based perspectives reveal diverging expectations around compensation, work-life balance, job security, and career growth.

This report highlights the key trends influencing talent attraction and retention in the healthcare sector and offers actionable insights to help organisations refine their employer brand and strengthen their employee value proposition (EVP). By aligning more closely with the evolving priorities of today's workforce, employers can position themselves as employers of choice in an increasingly competitive, skills-driven labour market.



04 executive summary

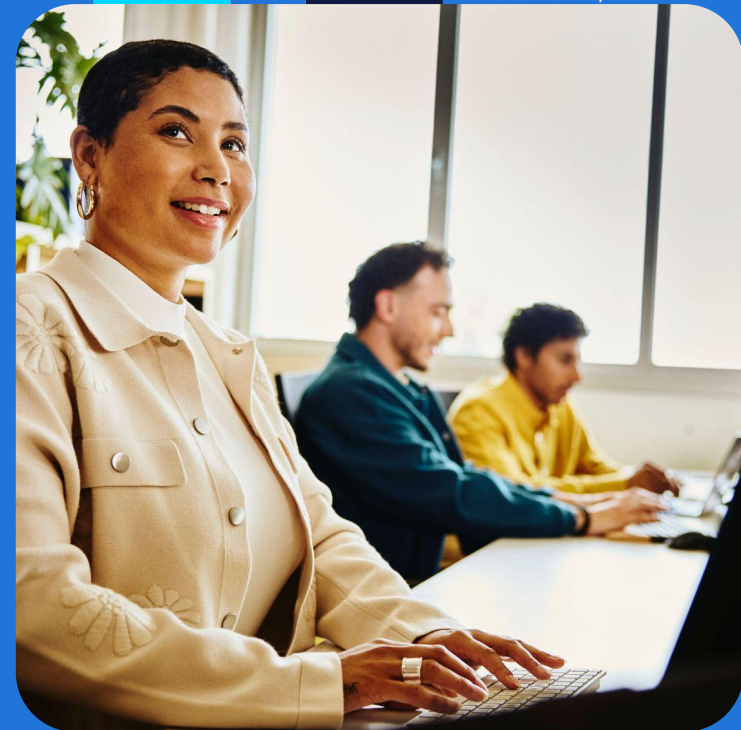
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# executive summary.



## current employer satisfaction is moderate in the healthcare sector.

In the healthcare sector, work–life balance leads the ideal employer profile as the most important driver. It is followed by attractive salary and benefits, job security, and a pleasant work atmosphere, with equal opportunities and career progression jointly completing the top five. The prominence of work–life balance likely reflects the demanding nature of the sector, characterised by high workloads, constant pressure, and often a 24/7 operating environment, which increases the need for recovery and balance. While work–life balance represents the strongest underlying need, salary and benefits play a more decisive role when trade-offs are required, indicating that pay acts as a key trigger rather than a baseline expectation.

North America and APAC largely follow the global pattern, with work–life balance, pay and job security forming the core of employer attractiveness. Europe differentiates itself through a stronger emphasis on pleasant work atmosphere, which emerges as its leading driver. In contrast, LATAM stands apart with a more career oriented profile: career progression features among the top three drivers, while work–life balance does not appear among the top priorities, indicating a stronger focus on advancement over balance.

Satisfaction with current employers in the healthcare sector is moderate, with around three in five talent expressing positive views. Delivery is strongest on core fundamentals such as job security, work atmosphere and equal opportunities, where current employers meet or even exceed expectations. In contrast, the largest gaps emerge around compensation and work–life balance: while both are central to employer attractiveness, current delivery falls short of what healthcare talent expects.

# 65%

of European talent consider a pleasant work atmosphere an important part of their ideal employer.

# 55%

of talent in Europe and APAC report being satisfied with their current employer, compared to 65% in LATAM and North America.

## in healthcare, reliable pay is the foundation of job security, while good work environment conditions shape work-life balance.

Job security is driven primarily by reliable pay, outweighing all other factors across regions and generations. Gen Z links security more closely to learning and future employability, while Baby Boomers rely more on stability. Regionally, Europe and APAC broadly follow the global pattern, North America places greater emphasis on fair employment practices, and LATAM stands out with a focus on recognition, long-term stability and learning development rather than transparent communication.

Work-life balance is shaped first and foremost by a positive work environment and sufficient time off, followed by flexibility and workload management. Expectations are broadly aligned across generations, though priorities shift by life stage: older talent focuses more on sustainable workloads, while Gen Z places greater emphasis on wellbeing support. Regionally, Europe and APAC mirror the global pattern, North America relies more on flexible work arrangements, and LATAM defines balance more through fulfilment, growth and wellbeing, highlighting again a closer link to career progression.

Secondary benefits are led by leave and time off, followed closely by flexibility, wellbeing support and retirement benefits, all contributing at a similar level. Generational differences emerge, with younger talent placing greater emphasis on wellbeing benefits, while older talent prioritizes recovery time and financial security. Regionally, clear differences are also evident: LATAM shows the strongest overall emphasis on secondary benefits, particularly financial protection; in contrast, North America places more weight on flexibility and wellbeing support. APAC, meanwhile, leans towards practical workplace support, whereas Europe prioritizes leave and recovery.



# 40%

of Gen Z link learning, development and employability to Job security, compared to 12% of Boomers.

# 92%

of talent in LATAM cite retirement and financial security as important secondary benefits.

## switching intentions outpace actual movement, pointing to underlying dissatisfaction that does not fully translate into action.

4/10

of APAC talent cite improving work-life balance as the main trigger for switching employers.

37%

of talent in LATAM find a job through recruiters, compared with just 12% in Europe.

In healthcare, job-switching intent exceeds actual mobility, indicating that dissatisfaction exists but is constrained by market or personal barriers. North America and APAC broadly mirror global switching levels, with intentions translating more readily into action, pointing to a more fluid labour market. Europe shows lower intentions and movement overall, while LATAM stands out with the widest gap between intent and action, suggesting high dissatisfaction that is not matched by available opportunities.

Across regions and generations, low compensation is the dominant reason for leaving and also the area where current employers fall short of expectations, making pay the primary retention pressure point. Work-life balance follows as the second key trigger and similarly shows weak delivery relative to its importance, reinforcing the critical role of sustainable day-to-day working conditions. While switching drivers are broadly consistent, regional nuances emerge: work-life balance overtakes pay as the main trigger in APAC, career growth plays a stronger role in LATAM, and leadership quality and work environment drive exits more strongly in North America, areas where current employer performance also lags. Younger talent is particularly sensitive to gaps in technology, innovation and development, while disengagement driven by lack of interest is most pronounced among older workers.

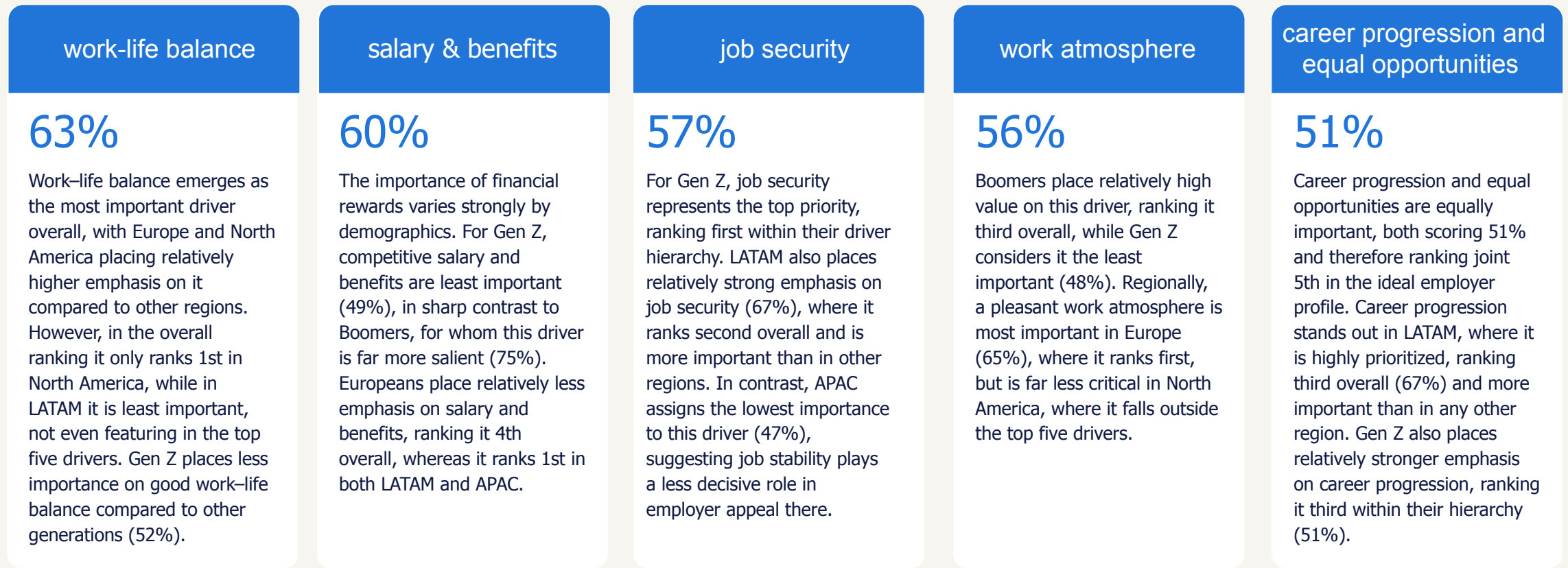
Job search in healthcare is led by job boards, which dominate in both reach and conversion. Personal connections, however, stand out for their strong ability to turn intent into actual hires, especially in LATAM and APAC. Recruiters also play a key role in securing jobs rather than in the initial search phase, although this is less evident in Europe. Meanwhile, social media and public employment services are becoming increasingly important parts of the job search journey.

# key drivers.

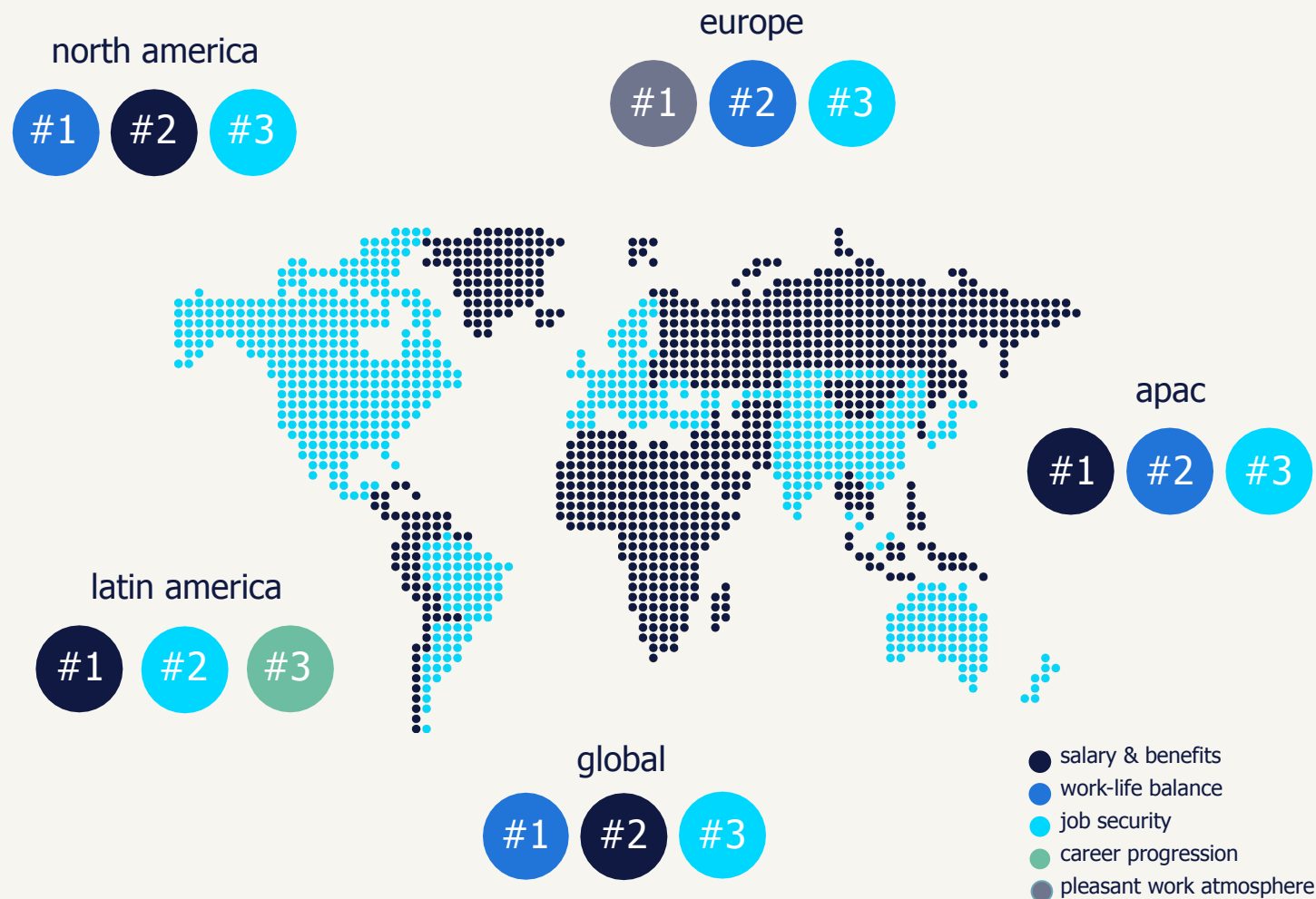


# top five reasons healthcare talent choose an employer.

Work-life balance emerges as the most important driver overall, followed by competitive salary and benefits, job security, and a pleasant work atmosphere. Career progression and equal opportunities rank joint 5th, reflecting identical importance levels.



# the ideal employer profile differs across regions



In the healthcare sector, work-life balance emerges as the most important driver overall, though its relevance varies by region. It leads in North America, while placing second in Europe and APAC, and does not feature among the top three drivers in LATAM.

North America's overall profile closely mirrors the global picture, with competitive salary and benefits and job security following closely behind work-life balance. Europe and APAC show broadly similar priority patterns, differing mainly in their lead driver: Europe uniquely places strongest emphasis on a pleasant work atmosphere, while APAC prioritizes salary and benefits.

Latin America stands apart with a distinct driver hierarchy, led by salary and benefits and job security, alongside career progression, the only region where this driver features so prominently, highlighting a more growth-oriented employer profile.

# explanation key drivers' relative priority.

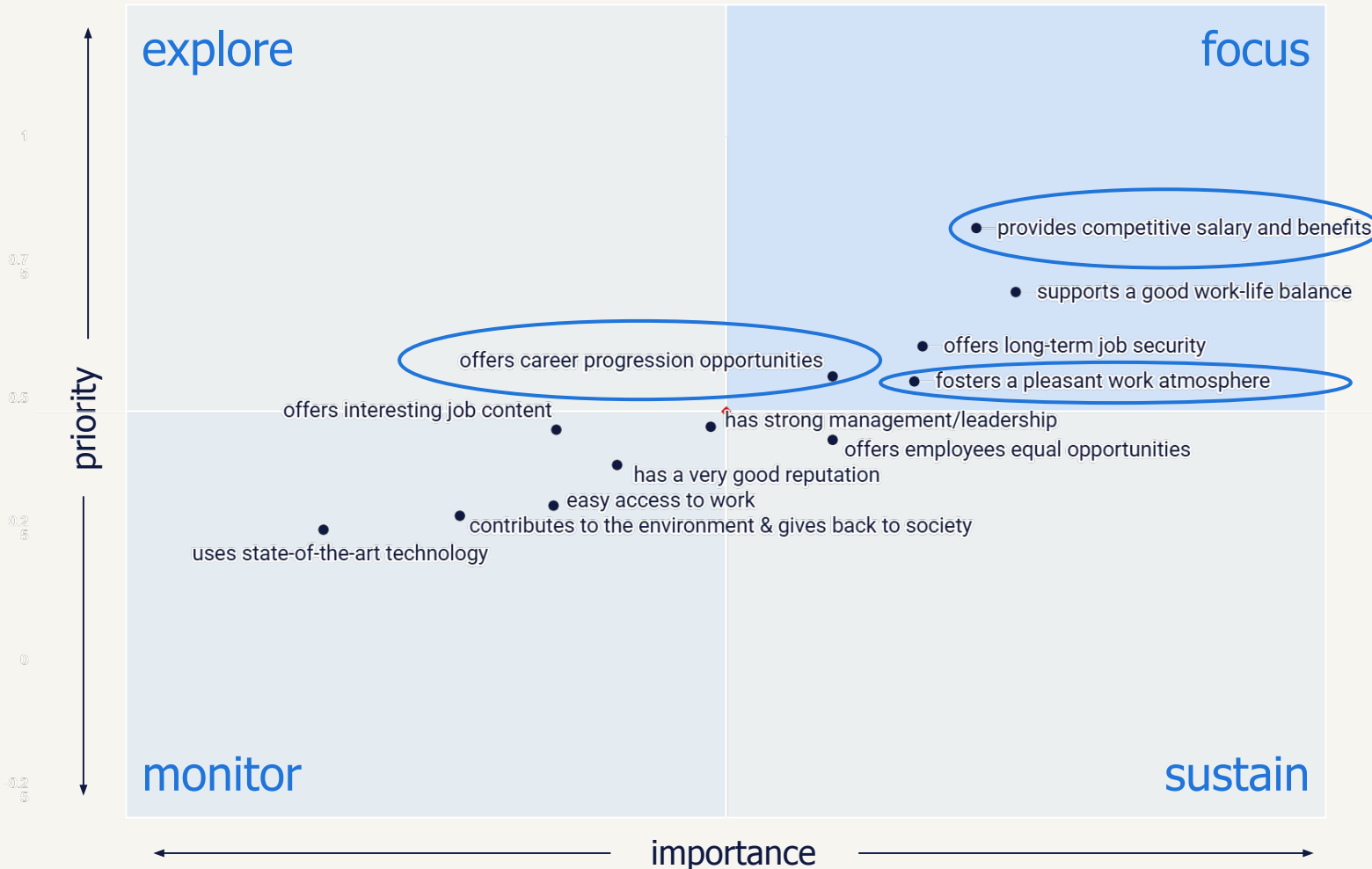


Higher-ranked drivers indicate greater importance or preference compared to those lower down, showing relative priorities.

This table illustrates both the absolute importance and the relative priority of the EVP drivers. Depending on their relationships, each driver falls into a different quadrant, and each quadrant provides distinct actionable insights.

Q. Based on your previous selections, please rank the most important factors that an ideal employer should have, in order of importance.

## key drivers' relative priority.



While work-life balance is the most important driver overall, competitive salary and benefits emerge as the top priority when priorities are made, indicating that pay acts as a key trigger rather than a baseline expectation.

Work-life balance, job security, a pleasant work atmosphere and career progression all sit within the Focus quadrant, highlighting their role as core elements of employer appeal.

In contrast, equal opportunities, despite ranking similarly to career progression in importance, remains in the Sustain quadrant with relatively lower priority. This indicates it is largely taken for granted and only becomes a trigger when expectations are not met.



Q. Based on your previous selections, please rank the most important factors that an ideal employer should have, in order of importance.

# how healthcare talent rate their current employer.

## 7 out of 10 talent rate their current employer high on job security.

Equal opportunities, a strong reputation, ease of access to work, and a pleasant work atmosphere complete the leading set of drivers in the current employer profile within the healthcare sector. Regionally, job security is evaluated most positively in Europe, while it plays a weaker role in APAC. In Latin America, equal opportunities emerge as the top-rated driver, with job security ranking only fourth, a pattern broadly mirrored in North America.

Generationally, job security ranks highest for Gen X and Millennials, while career progression is the leading driver for Gen Z and equal opportunities take priority among Baby Boomers.

Satisfaction levels are moderate, with around 60% expressing positive views of their current employer. Europe and LATAM report similar satisfaction levels (around 55%), whereas APAC and North America show higher satisfaction (around 65%).

## the largest expectation gap sits around salary and benefits.

Alignment between ideal and current employer profiles is strong on several foundational drivers. Job security, pleasant work atmosphere and equal opportunities are well aligned with expectations, with current employers meeting or even exceeding talent priorities in these areas.

In contrast, clear gaps emerge around the most critical drivers. Salary and benefits, which rank second in the ideal employer profile, fall to tenth place in current employer performance, highlighting a significant shortfall between expectations and delivery. A similar misalignment is visible for work-life balance, the most important driver overall, which ranks only seventh in the current employer profile.

These gaps indicate that while core fundamentals are largely in place, underperformance on reward and balance remains a key vulnerability in employer attractiveness.

# 55%

of Gen Z are satisfied with their current employer, where it is only 38% of Boomers.

# 75%

of talent in North America rate their current employer highly on offering equal opportunities.

# key driver deepdive.



## elements that reinforce a strong sense of job security.

in the healthcare sector, job security is primarily shaped by financial certainty, with reliable pay and benefits standing out as the strongest driver.

which elements most significantly contribute to a strong sense of job security?



Transparent and trustworthy communication, performance recognition, fair and consistent employment practices, and organisational and financial stability follow closely, all contributing at a similar level.

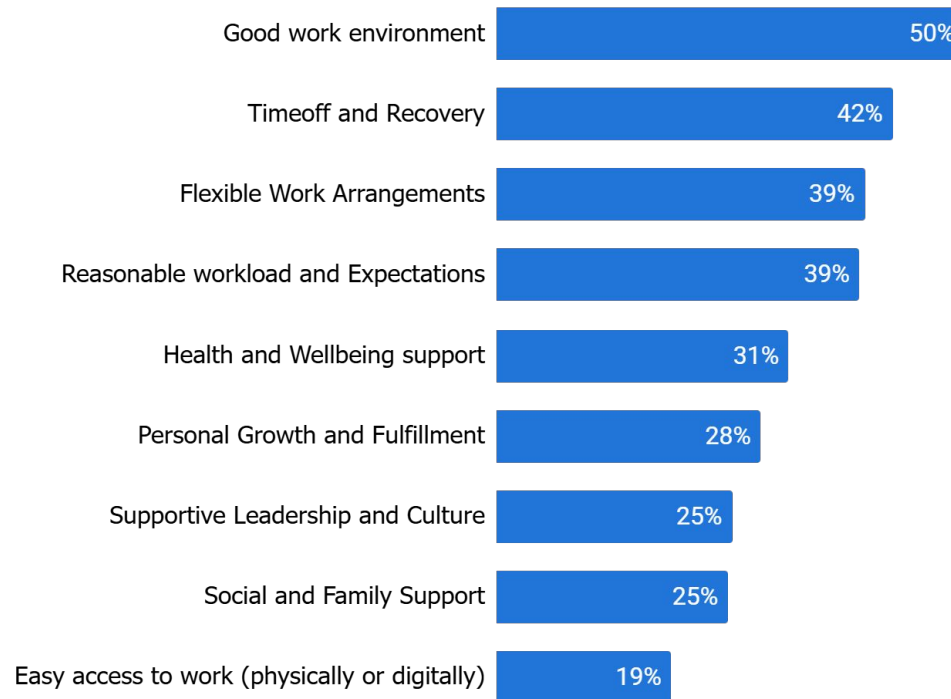
Demographically, pay is the leading driver across all regions, and is particularly critical in LATAM (72%), and among older generations (75% vs. 61%). Learning and development plays a distinctly generational role: it is a key contributor to job security for Gen Z (40%) but declines steadily in importance with age, ranking least among Baby Boomers (12%).

Europe broadly mirrors the global pattern, with a slightly stronger emphasis on organisational and financial stability (46%), ranking third. North America places greater weight on fair and consistent employment practices (47%), ranking second, while APAC closely follows the global average. LATAM displays a more distinct profile, with performance recognition ranking second, followed by stability and learning, development and employability, while transparent communication does not feature among the top priorities.

# elements that strengthen work-life balance.

a healthy work-life balance is mainly achieved by a good work environment and by time off and recovery.

which elements most significantly enhance a healthy work-life balance?



These are followed by flexible work arrangements and a reasonable workload and expectations.

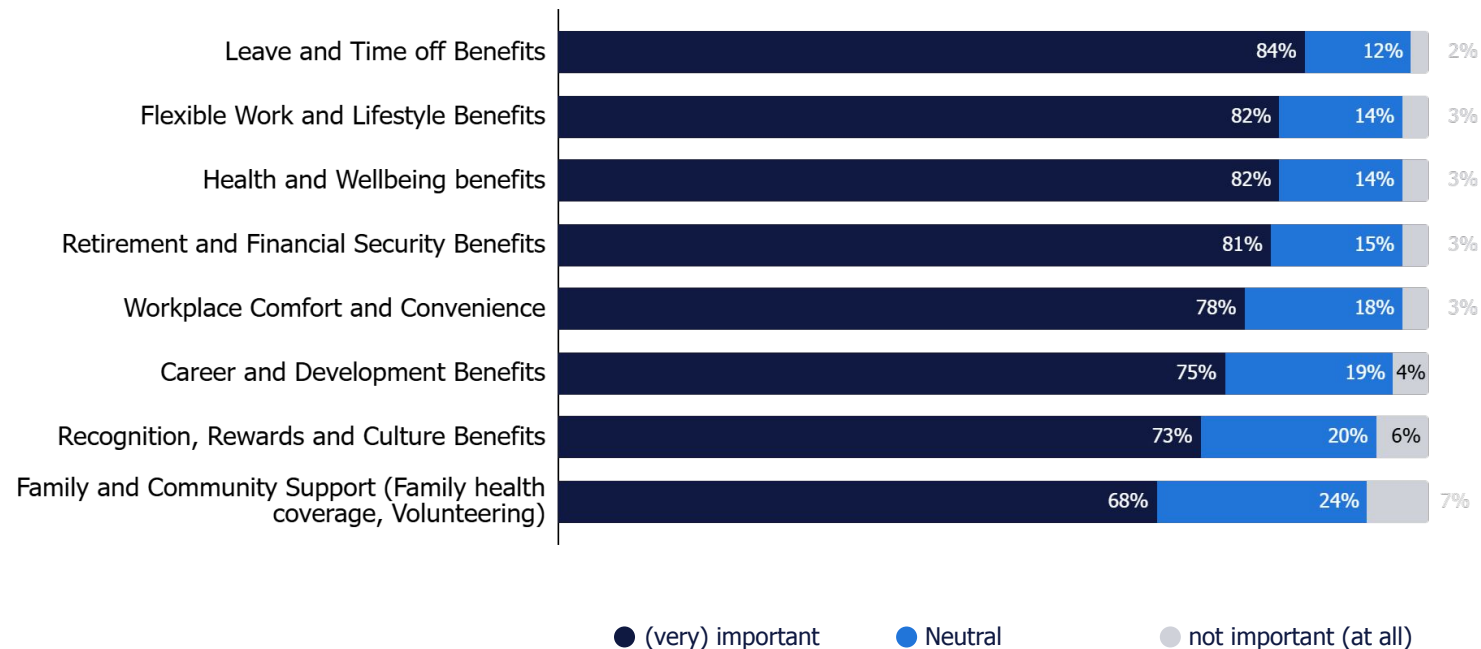
Across regions and generations, a good work environment consistently ranks as the most important driver of work-life balance. While patterns are broadly similar, some nuances emerge: Baby Boomers prioritize a reasonable workload as the second most important driver, whereas Gen Z places greater emphasis on health and wellbeing support, ranking it third overall.

Regionally, Europe and APAC closely mirror the global pattern. In North America, flexible work arrangements (41%) play a more prominent role in the healthcare sector, ranking second overall, while time off and recovery (39%) is less decisive. LATAM stands out, with personal growth and fulfilment (48%) ranking second, followed by health and wellbeing support (41%), indicating that work-life balance expectations extend beyond workload management to longer-term development and fulfilment.

## most important secondary benefits.

leave and time-off benefits, emerge as the most important secondary benefits in the healthcare sector.

### importance of secondary benefits



Followed by flexible work and lifestyle benefits, health and wellbeing benefits, and retirement and financial security, with only minimal differences in importance between them. Health and wellbeing benefits stand out for Gen Z, ranking as their most important secondary benefit, whereas leave and time off take priority among older generations.

Regionally, LATAM places the strongest emphasis on secondary benefits overall, particularly retirement and financial security, valued by 92% of talent. North America prioritizes flexible work and lifestyle benefits alongside employer-provided health and wellbeing support, while leave and time off are valued at a similar level. In APAC, workplace comfort and convenience stand out, whereas in Europe leave and time off benefits carry greater weight.



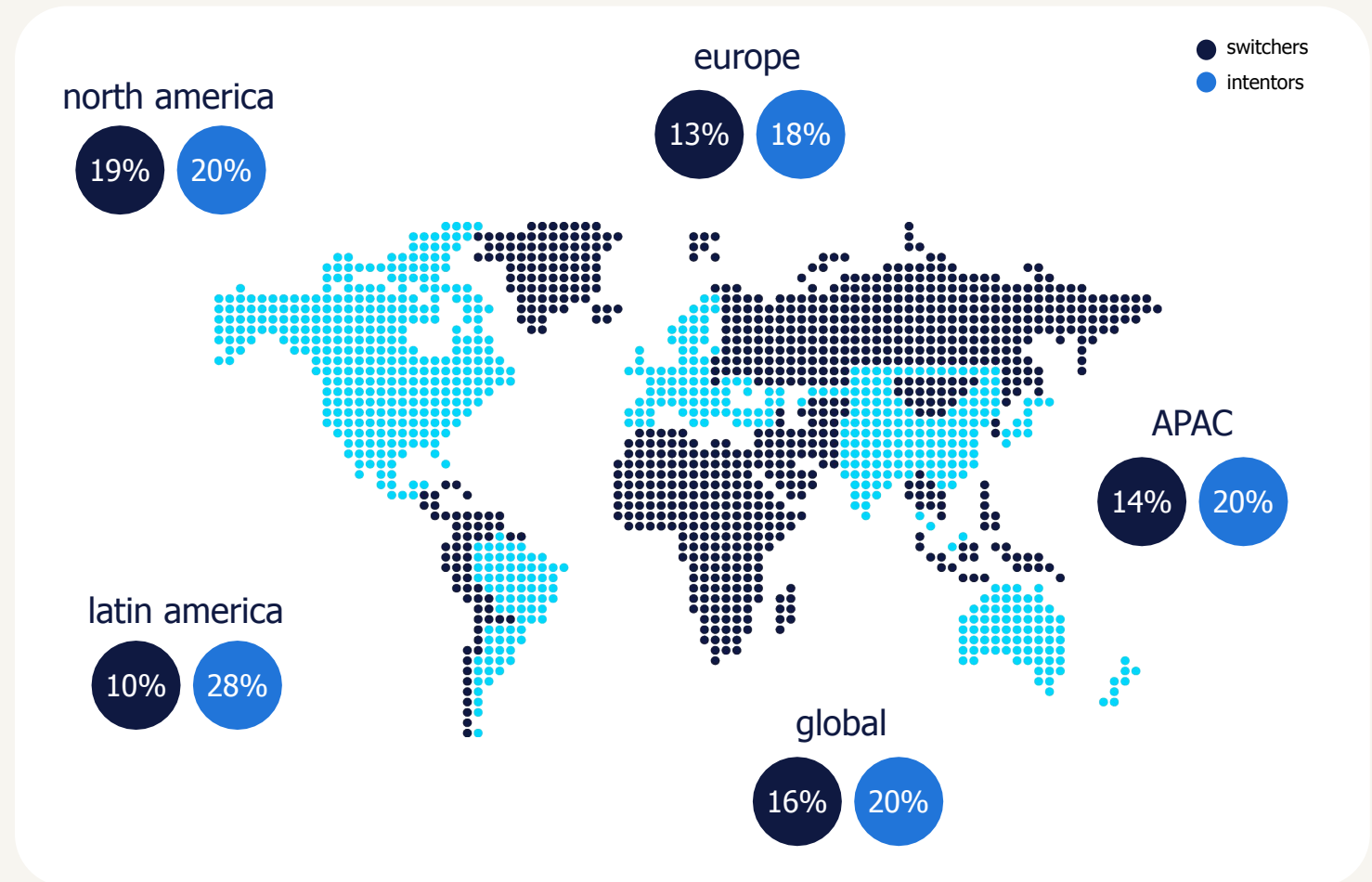
# job-switching behaviour in focus.



# job-switching intent exceeds actual mobility, pointing to limited movement in the healthcare sector.

Overall, job-switching behaviour in North America and APAC closely mirrors global levels. In Europe, both intentions to switch and actual job moves are slightly lower, indicating more restrained mobility. In North America, switching intentions translate more directly into actual job changes, suggesting lower barriers to mobility and a more fluid labour market.

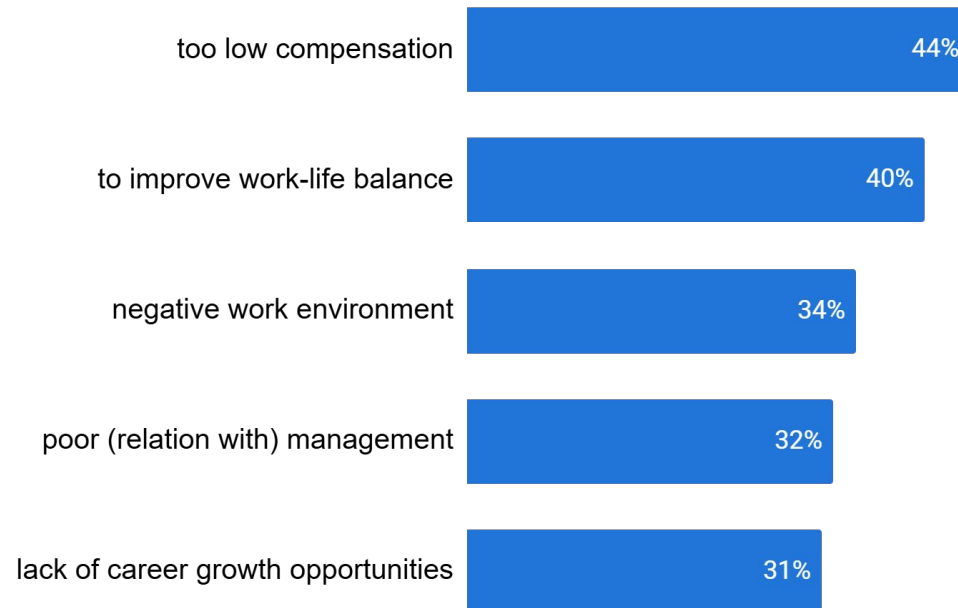
Latin America stands out as an outlier: job-switching intentions are high, with nearly three out of ten talent considering a move, yet actual mobility remains low at around one in ten. This gap points to underlying dissatisfaction that is not matched by market opportunities, limiting talents' ability to act on their intent to change jobs.



Q. Did you change jobs in the last 6 months?  
Q. Do you plan to change jobs within the next 6 months?

## too low compensation is the main reason to change employers in the healthcare sector, followed by work-life balance.

### reasons for leaving



Overall, the top reasons for leaving are largely consistent across regions, with low compensation emerging as the primary driver in most markets. North America and Europe closely align with the global pattern, while APAC stands out, where improving work-life balance overtakes pay as the most important reason to consider leaving. Notably, fostering a negative work environment does not appear among APAC's top five reasons to leave.

In Latin America, lack of career growth ranks as the second most important trigger (34%), highlighting strong expectations around career progression, which aligns closely with its importance in the ideal employer profile. In contrast, poor leadership and a negative work environment are more prominent drivers in North America (37% and 40%, respectively), indicating higher sensitivity to leadership quality and day-to-day experience.

Across generations, the top five reasons for leaving remain broadly aligned, with only minor shifts in ranking. Younger talent places greater emphasis on a lack of investment in technology and innovation (20%), more than any other generation, while Baby Boomers stand out for citing a lack of interest in their job as a key trigger (42%), showing a particularly strong disengagement effect at later career stages.



# how does it relate to current situation?

the largest gap between expectations and delivery for healthcare talent centre on compensation.

## reasons to leave

|     |                                                 |
|-----|-------------------------------------------------|
| 1.  | too low compensation                            |
| 2.  | to improve work-life balance                    |
| 3.  | negative work environment                       |
| 4.  | poor (relation with) management                 |
| 5.  | lack of career growth opportunities             |
| 6.  | lack of interest in job                         |
| 7.  | not equally rewarded                            |
| 8.  | fear of losing job                              |
| 9.  | work is not easily accessible                   |
| 10. | poor reputation                                 |
| 11. | lack of investment in technology and innovation |
| 12. | no environmental or social contribution         |

## evaluation of current employer

|     |                                      |
|-----|--------------------------------------|
| 1.  | job security                         |
| 2.  | equal opportunities                  |
| 3.  | very good reputation                 |
| 4.  | easy access to work                  |
| 5.  | pleasant work atmosphere             |
| 6.  | interesting job content              |
| 7.  | work-life balance                    |
| 8.  | career progression                   |
| 9.  | strong management/leadership         |
| 10. | salary & benefits                    |
| 11. | benefits the environment and society |
| 12. | state-of-the-art technology          |

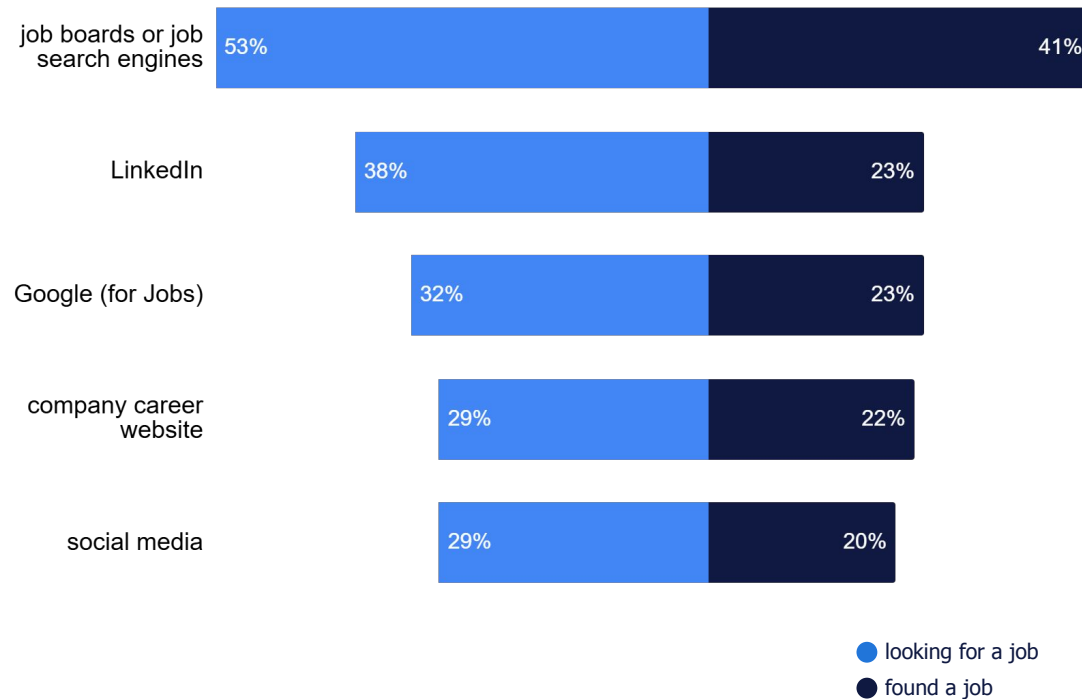
Low pay ranks as the leading reason to leave while placing only tenth in the current employer profile, indicating a substantial shortfall. Work-life balance shows a similar misalignment, ranking second as a reason to leave but only seventh in current employer performance. Poor relationships with managers also emerge as a pressure point, with leadership ranking ninth despite being a key driver of attrition. Career growth displays a smaller, yet still noticeable, gap.

Overall, the top reasons for leaving closely mirror areas of weaker delivery relative to expectations, reinforcing that unmet core needs continue to drive mobility. Pleasant work atmosphere is a notable exception: expectations and experience are more closely aligned, although shortfalls in this area can still prompt talent to consider leaving.



job boards are the most widely used job-search channel and deliver the broadest reach, serving as the main route for both job search and job finding.

### sources for job opportunities



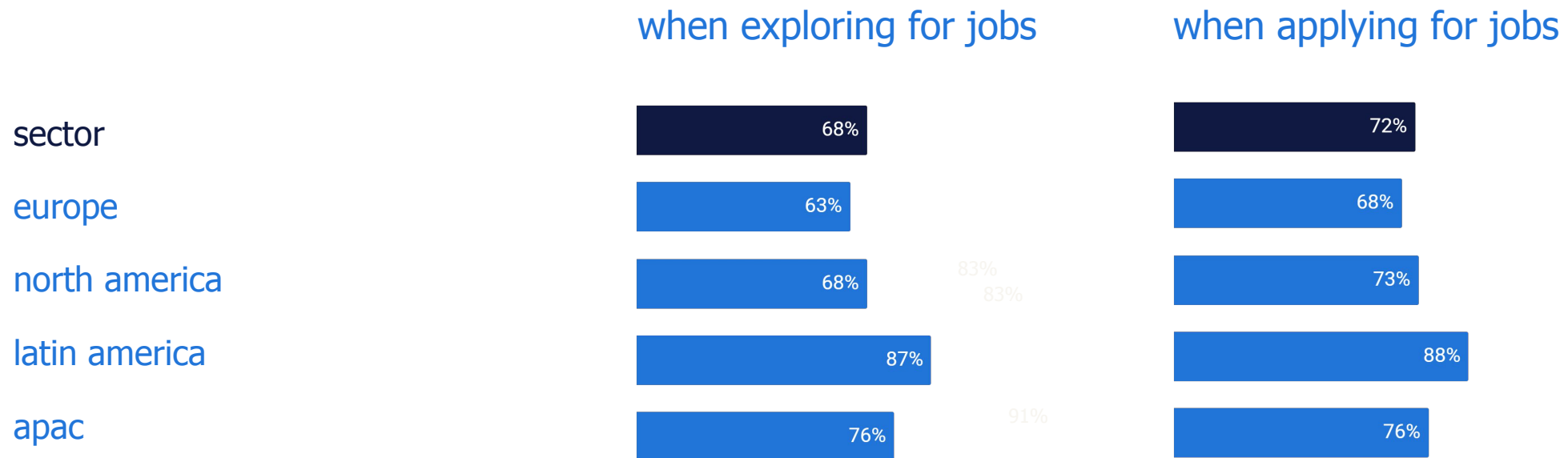
LinkedIn follows as the second most used channel; however, its success in securing a role is comparable to Google for Jobs, company career websites and social media, which show lower search usage but similar job-finding success, indicating relatively higher conversion.

While job portals dominate job search across regions, personal connections deliver disproportionate success in converting intent into employment, particularly in LATAM (31%) and APAC (35%).

In APAC, public employment services also play a significant role in job finding (37%). Europe and North America largely mirror the global pattern, although recruiters act as a key conversion channel in most regions (around 34%), with a more limited role in Europe (12%). In Europe social media (17%) and public employment services (17%) are becoming more relevant for successful job finding in Europe.

## importance of in person contact.

In the healthcare sector, the importance of personal contact during the job search process is high and increases from the exploration phase to the application stage. Europe shows the lowest preference for human interaction, while Latin America stands out with the strongest emphasis with nearly 9 in 10 healthcare talents indicating they value personal contact when exploring job opportunities.





## closing remarks.

The report has shown the ongoing dynamism within the priorities and perspectives of the global workforce in the healthcare sector, 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.

Detailed data and deeper insights into sub-group analysis and the specializations are available in our local market reports, designed to help organizations stay informed and remain ahead in an ever-evolving marketplace.



# appendix.

background  
information.



## 34 markets surveyed.

covering more than 75% of the global economy



|           |                |            |                 |                |
|-----------|----------------|------------|-----------------|----------------|
| argentina | chile          | hungary    | the netherlands | spain          |
| australia | china          | india      | new zealand     | sweden         |
| austria   | czech republic | italy      | norway          | switzerland    |
| belgium   | france         | japan      | poland          | united kingdom |
| brazil    | germany        | luxembourg | portugal        | united states  |
| canada    | greece         | malaysia   | romania         | uruguay        |
| denmark   | hong kong SAR  | mexico     | singapore       |                |

a representative employer brand research based on perceptions of the general audience. Optimizing more than 25 years of successful employer branding insights.

an independent survey with more than 160,000 respondents and 6,400 companies surveyed worldwide.

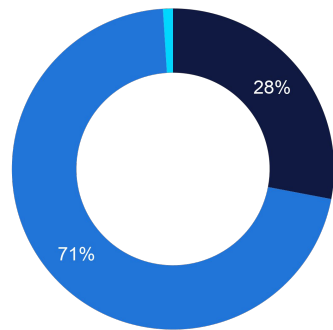
### sample

- a total of 9,463 interviews among healthcare talent worldwide
- aged 18 to retirement age
- representative on gender
- overrepresentation of age 25– 44
- comprised of students, employed and unemployed workforce

# sample composition in healthcare sector report.

socio-demographics, education, region

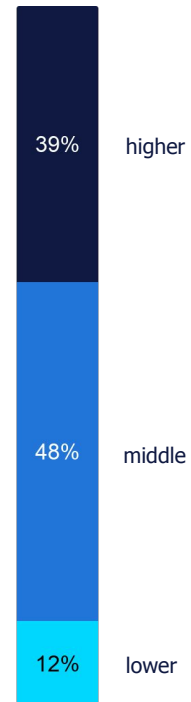
gender



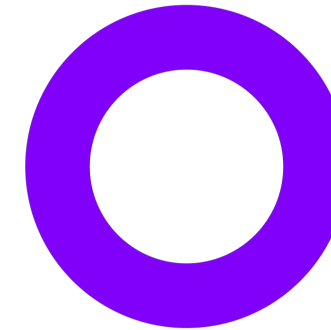
- male
- female
- other\*

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

education

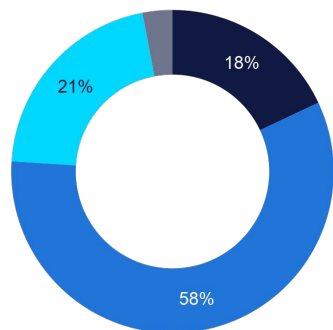


specializations



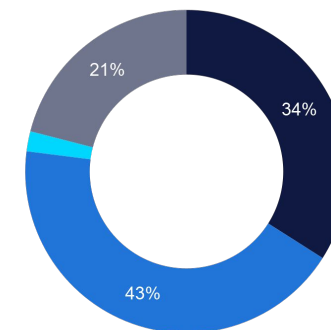
- operational
- professional
- digital

age



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

region



- Europe
- North America
- Latin America
- APAC

thank  
you.



partner for talent.