global healthcare professions report.

employer brand
research 2021

randstad

human forward.

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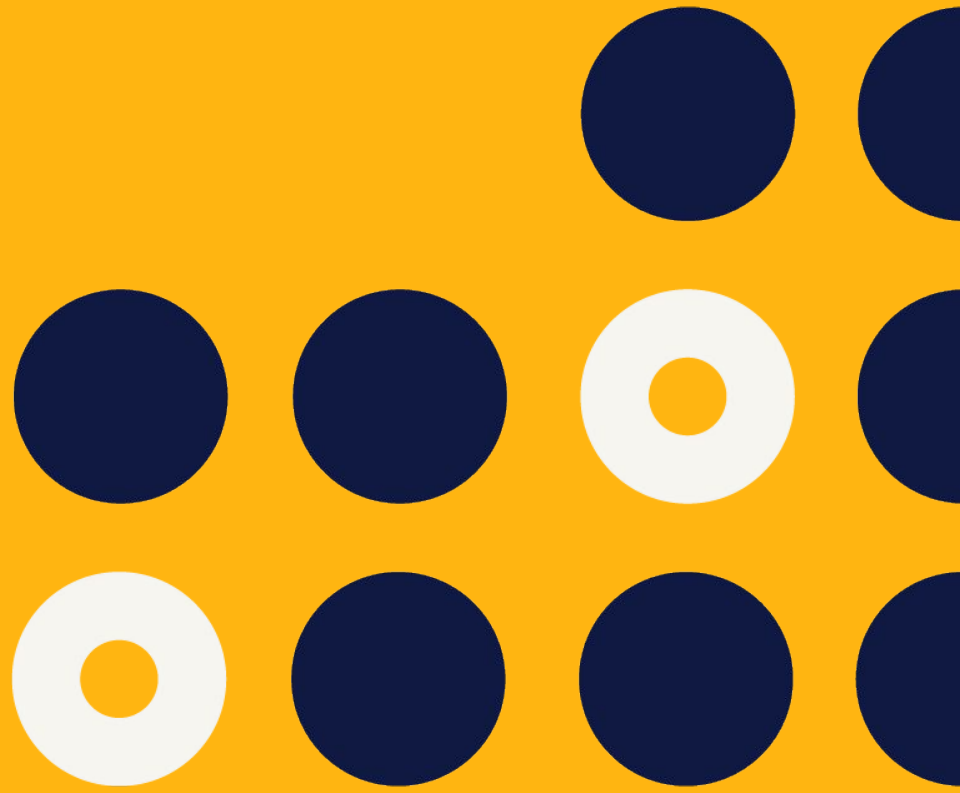


executive summary.

executive summary.

Even though the world of work has dramatically transformed in just over a year, some things have remained the same. The findings from our employer brand study show that healthcare professionals continued to work as normal (61%), more so than working-age adults around the world (50%). However, 1 in 3 healthcare professionals worked longer hours or reduced hours/reduced salary in 2020 due to COVID-19. Compared to professionals globally, only 3% of those in healthcare became unemployed as a result of the pandemic (vs. 9% globally).

Healthcare professionals have a slightly higher sense of job security when compared to the global workforce: 20% of healthcare professionals fear job loss in 2021, compared to 26% among the global workforce. Those who are afraid to lose their jobs are three times more likely than those who do not fear job loss to look for another employer (30% vs. 11%).

Healthcare professionals' loyalty mirrors that of the global workforce, as 67% said they were more loyal to their employer, while only 8% said they were less loyal.

executive summary.

The factor most appealing to the healthcare workforce* is its salary and benefits offering (cited by 60%), followed by a good work-life balance (57%) and pleasant work atmosphere (56%). However, when diving deeper into specific healthcare groups, we see that health associate professionals rate pleasant work atmosphere, a good work-life balance, and attractive salary and benefits as the foremost important drivers (50%, respectively). Moreover, personal care workers deem a pleasant work atmosphere more important than an attractive salary and benefits (60% vs. 58%) and especially so when compared to health professionals (66% who said attractive salary & benefits was important to them). Financial health and strong management are more important to personal care workers (54% and 53%, respectively) compared to health professionals (49% and 43%, respectively) or to associate professionals (43% and 39%, respectively).

Life sciences (consisting of pharma, hospitals, health research, medical device developers & manufacturers) is the most attractive sector for the healthcare workforce and the sector that healthcare professionals feel their skills are most suited for. Agriculture follows as the next most attractive sector and hospitality and FMCG are the next two industries for which the surveyed healthcare respondents feel they could work in.

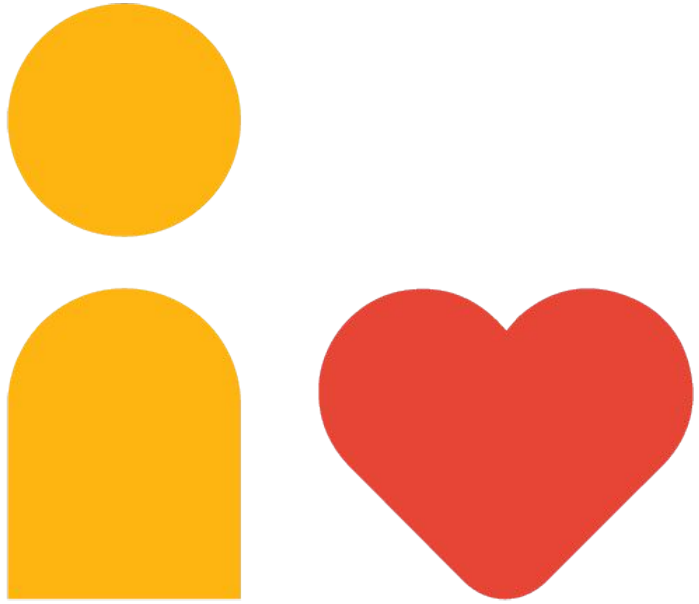
*definition & sample composition of the healthcare professions can be found on slide 46

executive summary.

About 1 in 6 global healthcare professionals changed their employer in the second half of 2020 (16%) and/or planned to do so in the first half of 2021 (15%). This is more often the case among those aged 18 to 24 (26% and 23%, respectively), and it is slightly different from the global workforce who was less likely to have changed their employer (12%) but more likely to plan to do so (20%). Healthcare professionals changed jobs most often in North America; those in Latin America are more likely than those in other regions to plan to change employer in the first half of 2021.

Healthcare professionals are most likely to find their next employer on job portals (30%) followed by recruiters (26%). Women in healthcare and those aged 18 to 24 more often make use of job portals (38% and 66%, respectively) while men and the higher-educated use recruiters most (35%, respectively).

We hope the data contained in the following pages will help you understand how to better attract healthcare talent in a transformed world of work.



what the

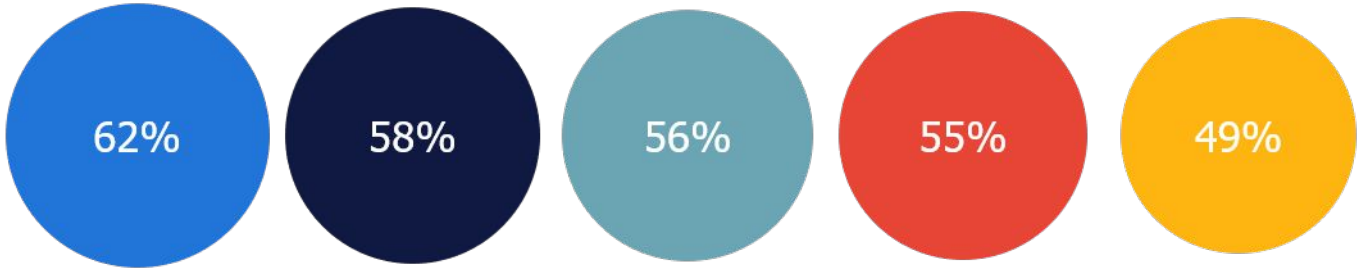
healthcare workforce wants.

the top 5 drivers see slight variations among global healthcare vs. the global workforce.

top 5 reasons to choose an employer

base: health professionals, health associates and care workers in health services

base: all survey respondents



- attractive salary & benefits
- job security
- career progression
- work-life balance
- pleasant work atmosphere
- financially healthy

work-life balance evident in healthcare.

At a total level, the most important driver (salary & benefits) is consistent for both the average global workforce and global healthcare workforce. When taking a closer a look at healthcare groups defined within the healthcare category we begin to see differences between the groups. The healthcare professionals group follow the same pattern as the average workforce; however for healthcare associates and personal care workers a pleasant work atmosphere is considered the most important driver.

Work-life balance can be seen globally as the second most important attribute, especially for women. This is also true for healthcare professionals.

During times of crisis, one is more likely to think about job security. Our research shows that globally, working-age adults rank this as the third-most important driver (56%). When looking at the profession groups within the global healthcare workforce, it is seen that healthcare professionals (59%) find this to be more important than that of their counterparts, health associates (48%) and personal care workers (55%).

Latin America & CIS find more attributes important.

Healthcare survey respondents living in LATAM and the CIS region are more demanding overall as they consider as many as eight attributes for an ideal employer important to them compared to those in Europe, APAC and North America (average 6.8 drivers).

Attractive salary & benefits is the most important driver among the global healthcare workforce (60%) and scores highest among women (64%) and those living in Latin American (74%), Europe (67%) and CIS (80%).

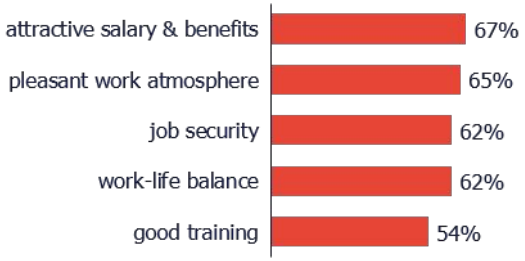
Salary & benefits is also considered most important in 2 of 5 regions (Europe and North America). For Latin America, APAC and CIS, salary and benefits is rated in second place, however. This attribute falls slightly short of being rated as the topmost important driver for all three regions.

For the Latin American healthcare workforce, career progression (77%) is the most important driver, whereas work-life balance (51%) is most important in APAC and financial health (81%) is ranked in first place by healthcare professionals in the CIS region.

what the healthcare workforce want by region.

north america

europe



cis

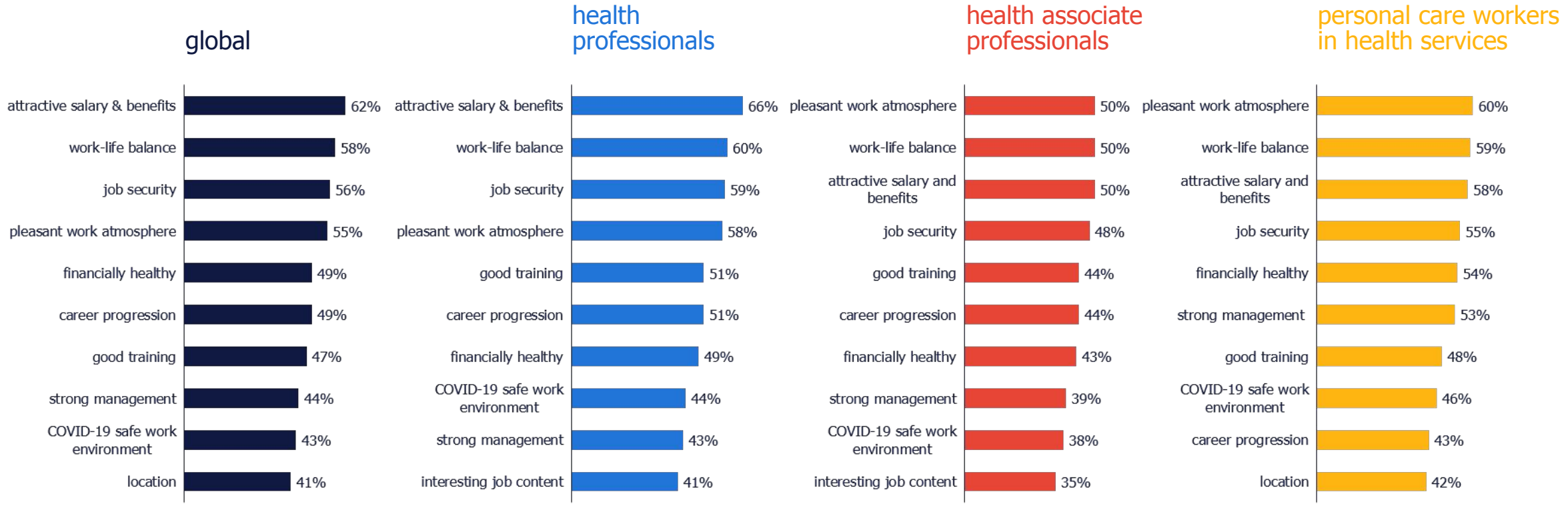
latin america

apac

base: health professionals, health associates and care workers in health services

the most sought-after driver differs
across the healthcare profession groups.

top 10 reasons to choose an employer:
global healthcare workforce vs. all survey respondents



the use of latest technologies not considered important among the healthcare workforce.

6 least important reasons to choose an employer:
global healthcare workforce vs. all survey respondents

remote working less important in healthcare than other professions.

When comparing certain attributes across the four professions (healthcare, ITC, business administration and customer service), the healthcare workforce rate the possibility of working remotely lower than that of the other professions.

Irrespective of those working in healthcare, attractive salary & benefits and work-life balance are the two most important drivers among all four groups of professionals.

Overall, those in healthcare are equally demanding when compared to the other professions in what they want from an ideal employer, with an average of seven drivers important to all four talent groups.

a pleasant work atmosphere is equally important when comparing the healthcare workforce to other professions.

top 5 most important drivers globally compared to
4 job family groups

	attractive salary & benefits	work-life balance	job security	pleasant work atmosphere	career progression
global	63%	58%	56%	55%	49%
healthcare professionals	60%	57%	55%	56%	48%
ITC & engineering	65%	62%	60%	55%	54%
business & administration	63%	59%	57%	54%	49%
customer services & support	63%	59%	57%	57%	48%

healthcare workforce

sector attractiveness.

healthcare workforce sector attractiveness insights.

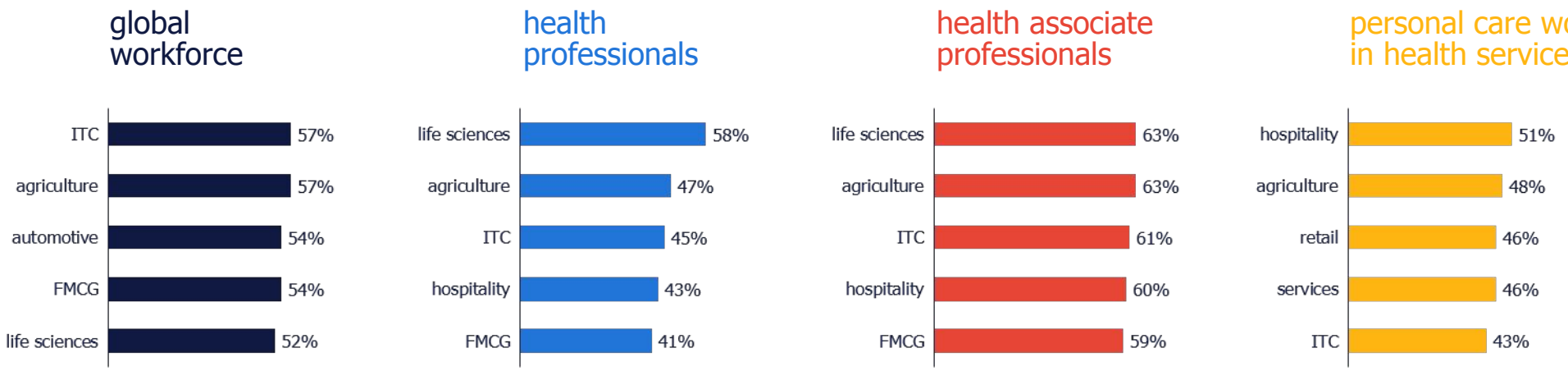
Life sciences (consisting of pharma, hospitals, health research, and medical device developers and manufacturers) is the most attractive sector for the healthcare workforce. The second most attractive sector for this group is agriculture. Aside from the sector in which they work, the majority of surveyed healthcare respondents feel that their skills could also be suited to roles within the hospitality (39%) and FMCG (35%) sectors.

When further examining the three healthcare profession groups, the average healthcare professional believes they possess the highest ability to work in the life sciences sector, followed by the hospitality industry. Notably, healthcare associates feel that they have more qualifications to work in the FMCG sector. Personal care workers feel that they have the most skills to work in the hospitality industry.

In addition to the sectors mentioned above, agriculture and ITC are also seen as attractive sectors among the healthcare workforce. Fewer workers, however, feel that they have the ability to work in these areas when compared to life sciences, FMCG and hospitality. Our survey shows that healthcare associates and personal care workers feel less qualified than do health professionals to work in the life science sector group. Thus, employers may want to research what other skill sets these two groups may require.

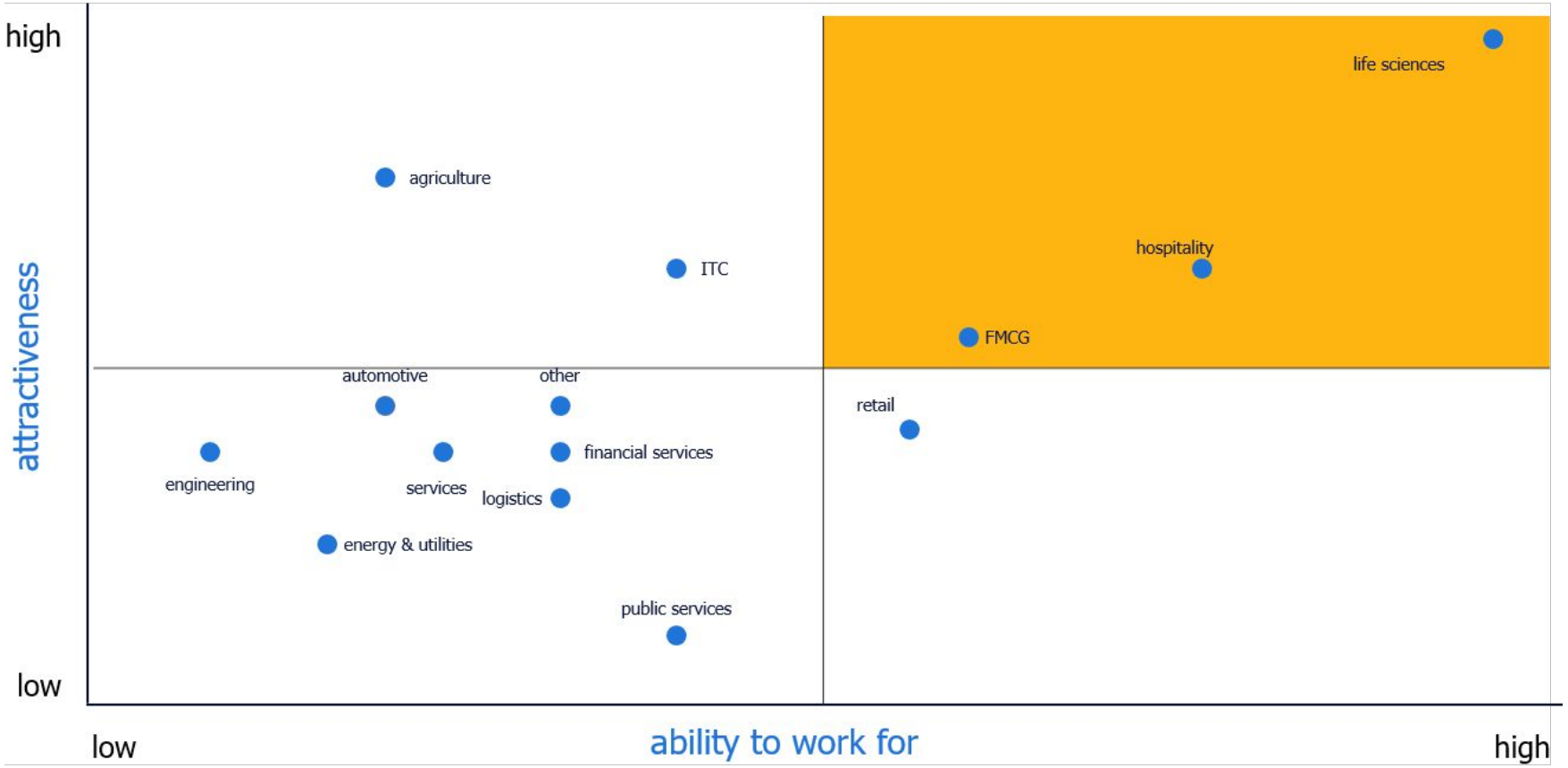
agriculture rates as a very attractive sector among the global healthcare workforce.

sector attractiveness



*the ITC sector relates to companies in IT, technology & Communications

total healthcare workforce attractiveness
vs. ability to work for it.



high ability to work for

sectors with a high score contain more companies whom respondents feel they could work for, based on their skills.

high attractiveness

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

half of personal care workers say that they have the skill set to work in the hospitality industry.

sector ability to work for

*the ITC sector relates to companies in IT, technology & communications

job switching

behavior.

1 in 6 plan to change employers.

15% of the global healthcare workforce changed their employer in the last half of 2020, more so among the 18–24-year-olds (26%). Overall, 16% intend to switch employers in the first half of 2021, which sees the same age group (23%) intending to do so more than others.

North America sees the highest number of workers switching jobs in the last half of 2020 (22%), followed by CIS and Europe (14% and 13%, respectively). Compared with other regions, working-age adults in Latin America are most likely to consider changing their employer in the first half of 2021 (24%).

Those who did not change their employer were more inclined to consider a pleasant work atmosphere and attractive salary & benefits more important than those who changed jobs in the last half of 2020.

job switching among the healthcare workforce is highest in north america while intension is highest in latin america.

global switchers in healthcare

15%

changed employer in the past 6 months.

global intenders in healthcare

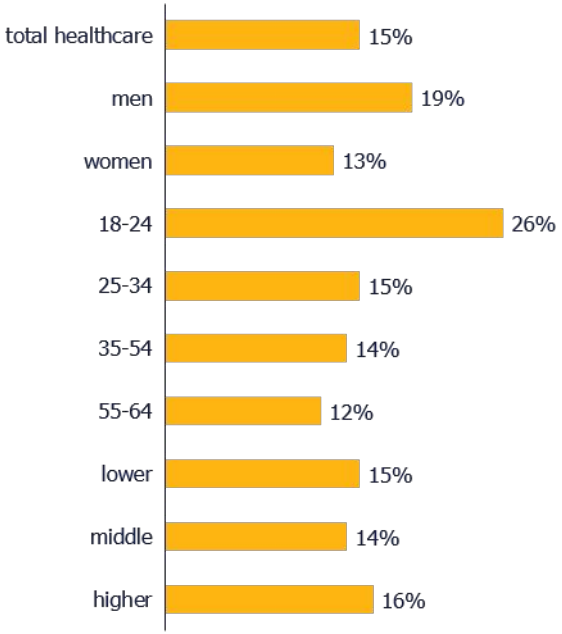
16%

plan to change employer within the next 6 months.

switching behavior among the healthcare workforce by socio-demographics.

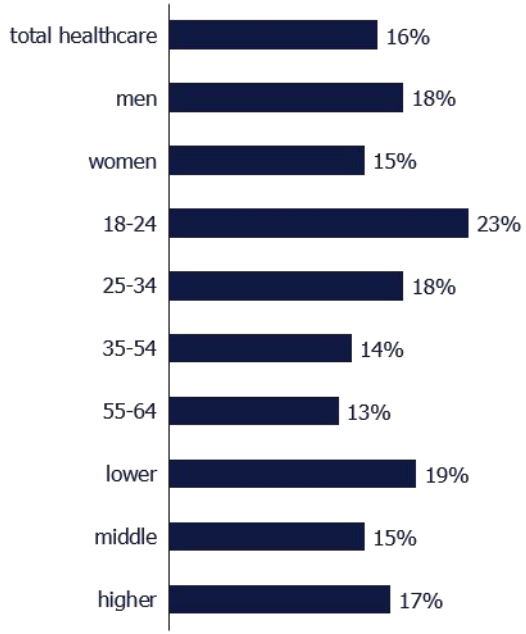
switchers

base: health professionals, health associates and care workers in health services



intenders

base: health professionals, health associates and care workers in health services



Deep dive into switching behavior by health professionals, health associates and care workers can be found in the appendix.

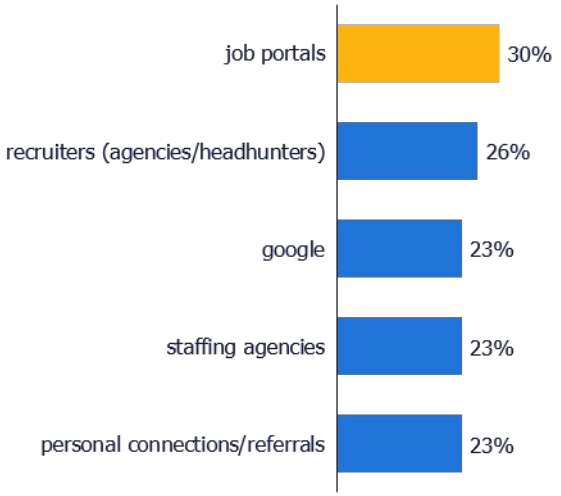
job portals remain critical to talent seeking opportunities.

The search channel most often used by global healthcare job seekers is job portals (30%). This is especially true for women (38%) and for younger candidates (66% of 18–24-year-olds). Furthermore, Indeed.com is far more popular among women (84%) than for men (44%).

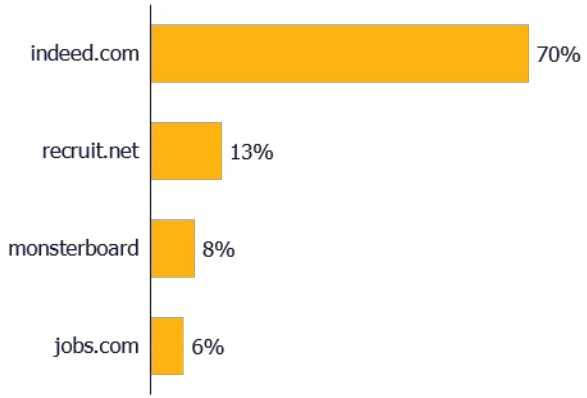
When looking at men in healthcare, recruiters (35%) and staffing agencies (34%) are far more popular for them when compared to their female colleagues (17% vs. 14%). Higher-educated professionals (35%) use recruiters the most when looking for a new job, whereas the middle-educated (41%) use job portals and the lower-educated (32%) tend to use staffing agencies more frequently.

healthcare professionals' preferences
when searching for new job opportunities.

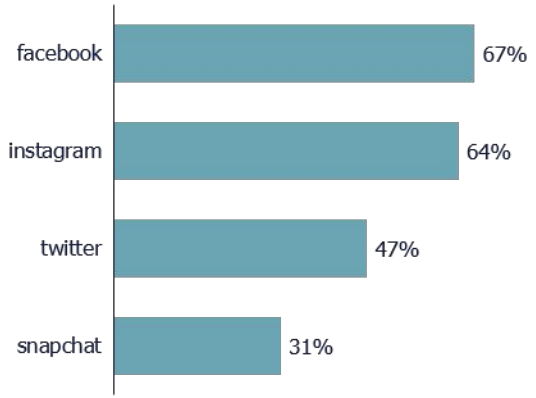
top 5 channels used to find a job



top 4 job portals



most searched social media channels



COVID-19

in focus.

COVID-19 has caused disruption among the global healthcare workforce ...

Despite the disruption caused by the pandemic, our survey found that 6 in 10 healthcare workers globally continued to work as usual. Furthermore (and not surprisingly), healthcare workers found themselves working longer hours than usual (14%), which is higher than the global average (8%). This was especially true for those living in Europe (20%) and CIS (21%), who worked longer hours than normal when compared to the rest of the regions.

Overall, 38% of the healthcare workforce were either furloughed, became unemployed, worked different hours than usual or for other reasons saw their employment situation change due to COVID-19.

… and some considerable impact on employment rates.

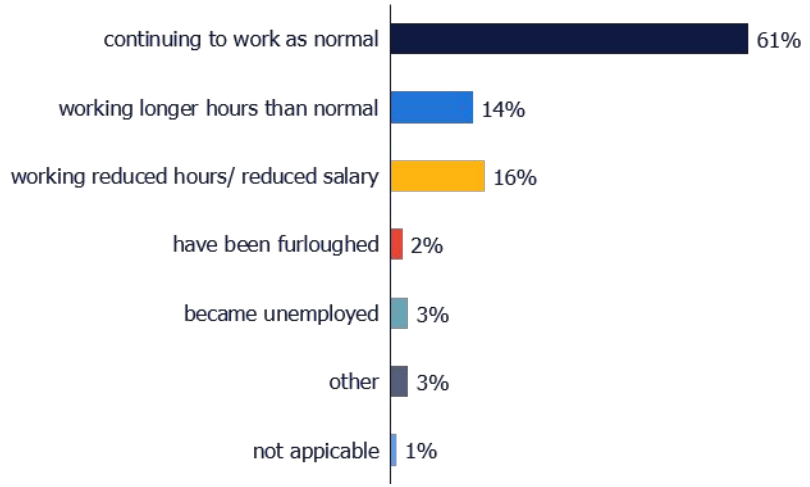
Another finding from the research was that unemployment globally was higher than that of the healthcare workforce overall (9% vs. 3%, respectively). A higher proportion of healthcare workers who were furloughed or became unemployed was among lower-educated workers (11%), and those in Latin America (8%).

A greater number of the healthcare workforce who are afraid of losing their job in 2021 plan to change their job in the first six months of 2021 (30%), whereas for those not afraid of losing their job, only 11% plan to change their job. This is not too different from the global average, where 29% of the workforce afraid of losing their job plan to change and 12% not afraid plan to change their job in the first six months of 2021.

how COVID-19 affected employment.

how COVID-19 changed one's employment situation

base: health professionals, health associates and care workers in health services



fear of job loss

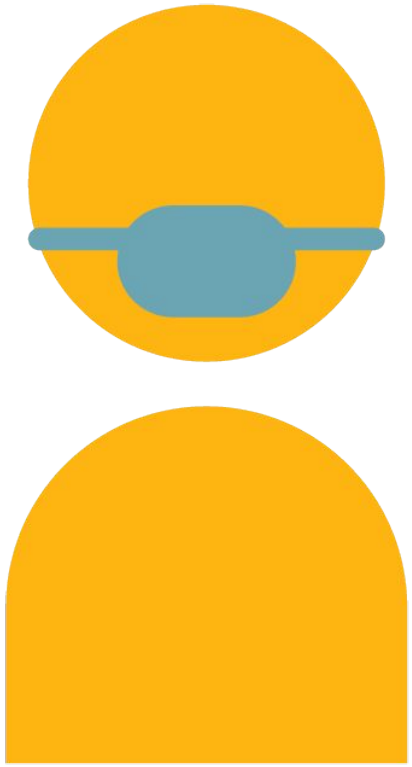
global

20%

Adults who continued to work in 2020 are afraid they will lose their job in 2021 as a result of COVID-19.

region

Workers in Latin America whose jobs were not affected in 2020 by COVID-19 are the most afraid of losing their job in 2021 (37%), whereas those in Europe are least afraid of losing their job in 2021 (17%).



intention to switch jobs among those fearing job loss and those unafraid.

afraid

30%

of those who are afraid of losing their job plan to change their job in the next six months.

not afraid

11%

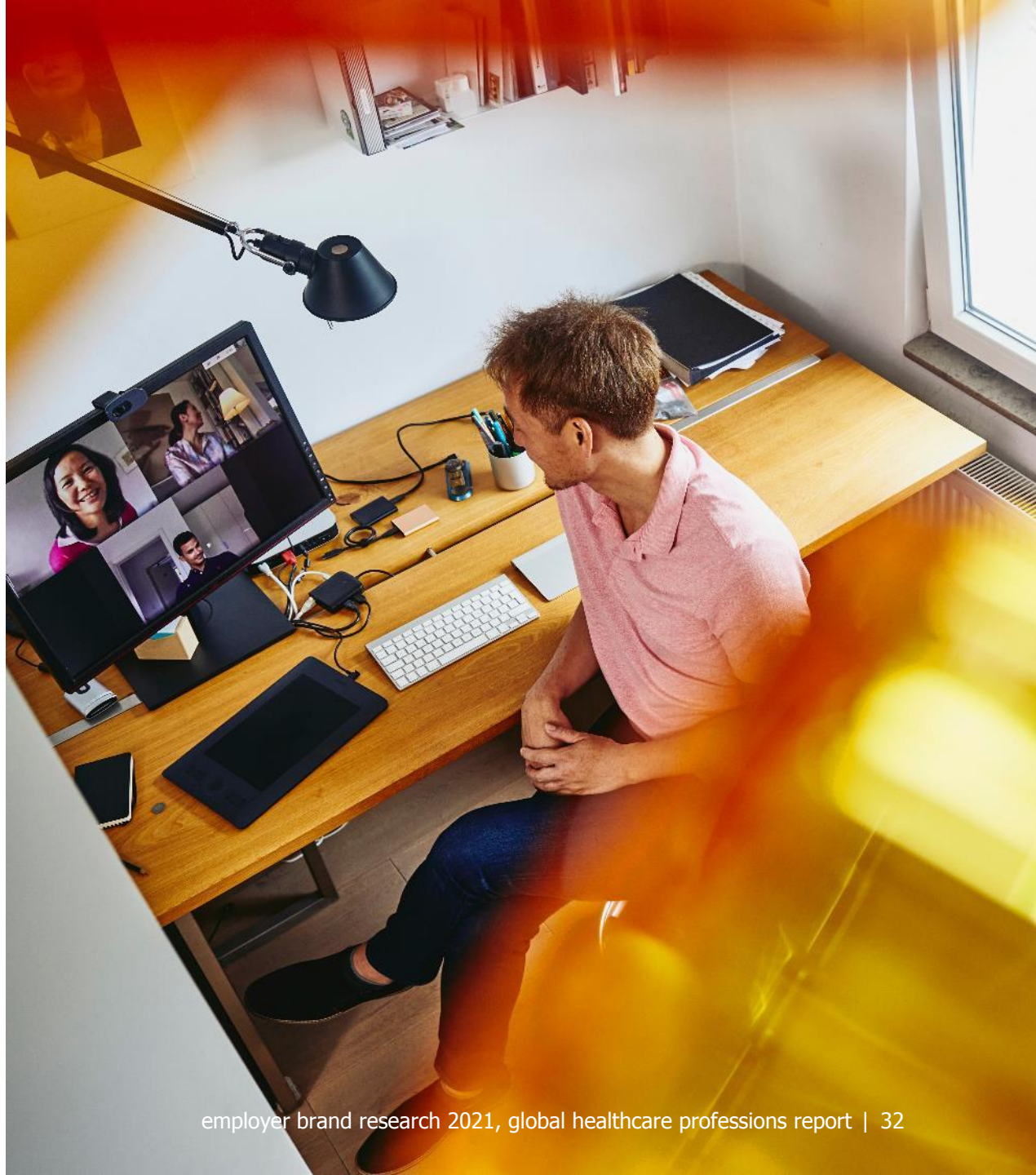
of those who are not afraid of losing their job plan to change their job in the next six months.

close to one-third say remote arrangement is important.

29% of the healthcare workforce are attracted to companies offering the possibility of working remotely. Regionally, working remotely can be seen as more important in Latin America (45%) and CIS (35%).

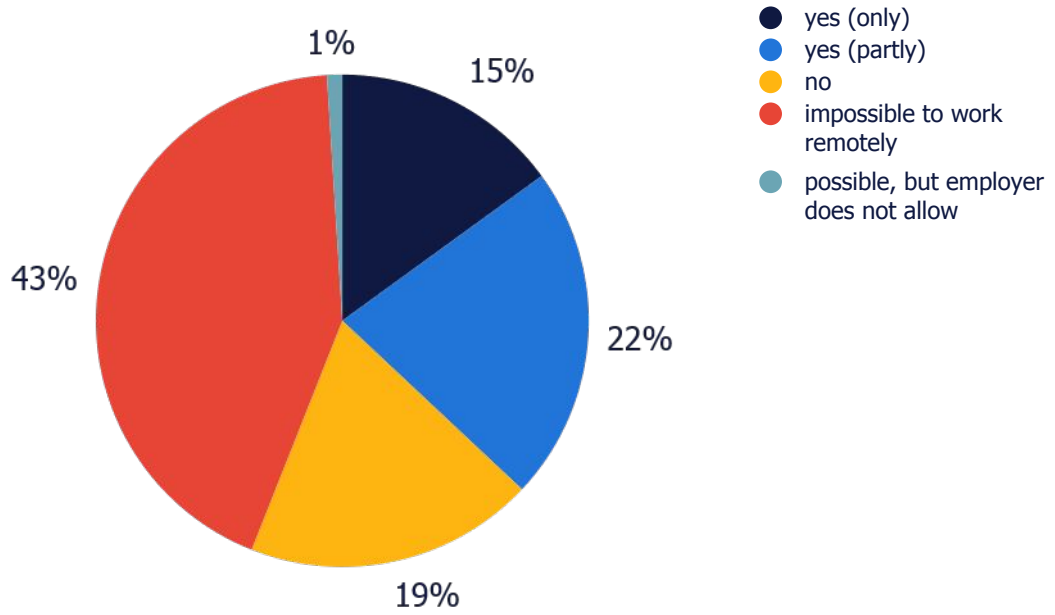
More of those living in Latin America started working partly or fully from home during the COVID-19 crisis (47%). On the other hand, more jobs in Europe were required to be performed on premise than jobs in the other regions (53%).

Out of the three healthcare profession groups, personal care workers found it impossible to work from home due to the nature of their role, with only 17% being able to work partly of fully from home. For healthcare professionals this figure increases quite substantially to 37% and even more so for healthcare associates, with 47% indicating that they could work from home during the pandemic.

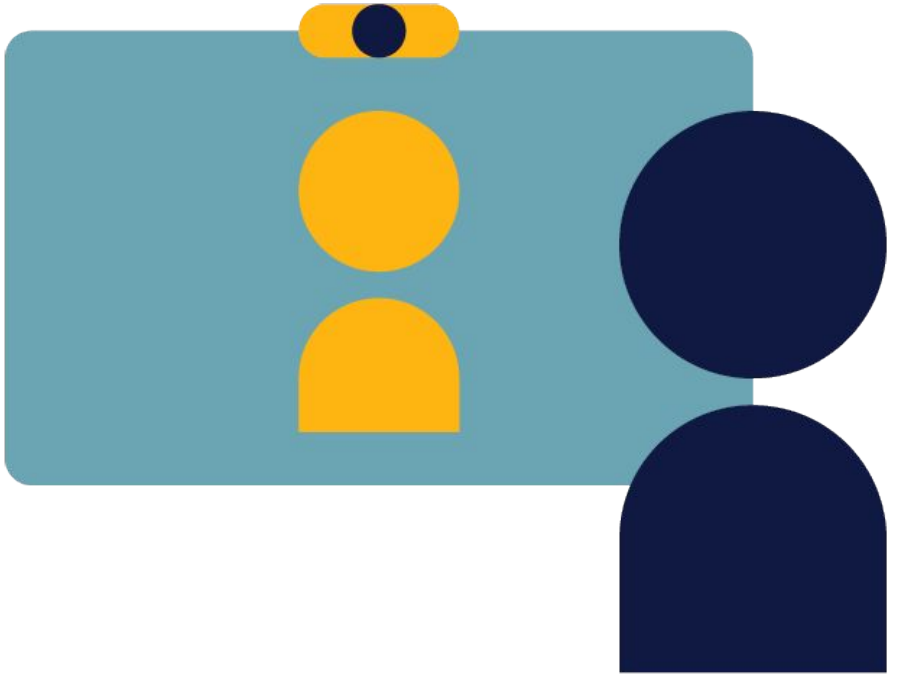


more than one-third of healthcare workers started working remotely during the COVID-19 pandemic.

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



base: health professionals, health associates and care workers in health services



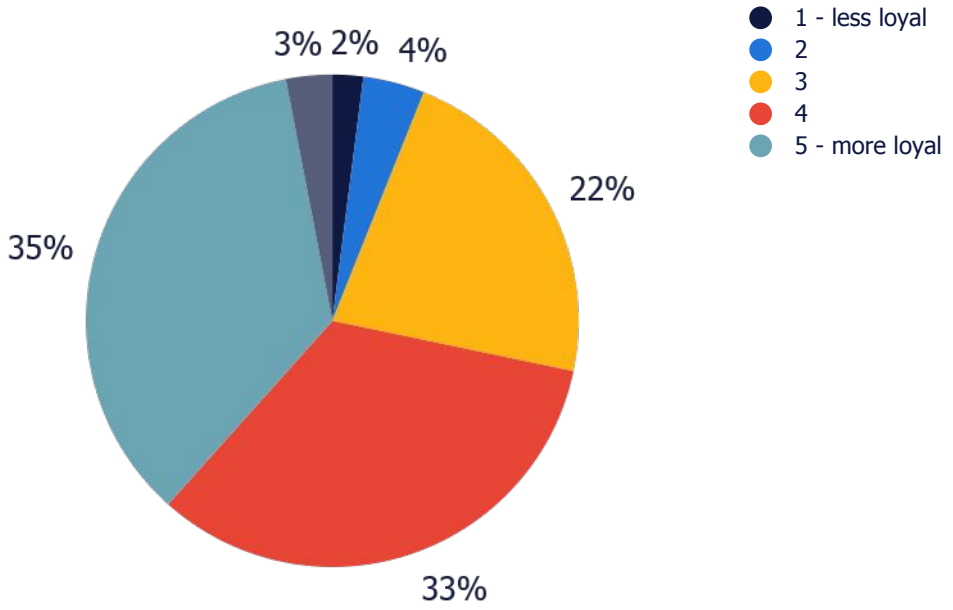
majority of healthcare workers made the decision to work remotely.

Out of the 37% of those who started working remotely, 63% were involved in the decision to do so, whereas for 35% the decision was mandated by their employer and/or regulatory authorities. More men (70%) were involved in their decision to work remotely than women (54%). In North America, the highest number (71%) of healthcare workers were involved in the decision to work remotely whereas the highest number where the decision was mandated by the authorities can be seen in the APAC region (44%).

Across the three healthcare profession groups, there was not much difference when it came to the decision to work remotely, with 62% of health professionals, 64% for healthcare associates and 68% for personal care workers doing so.

employer management of COVID-19
results in a high loyalty among healthcare workers.

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



base: health professionals, health associates and care workers in health services

The way healthcare employers worldwide have supported their employees and managed the pandemic has had a positive impact on loyalty. Overall, 67% of talent feel more loyal to their employer as opposed to 8% who feel less loyal.

A high percentage of adults in healthcare who are more educated (73%), and those located in North America (71%), Latin America (66%), and APAC (78%) say they are more loyal to their employer. Less educated workers (57%), and workers in in Europe (47%), and the CIS region (22%) were less loyal.

appendix.

1 what the healthcare workforce want
2 job switching behavior

what the healthcare

workforce want.

what the healthcare workforce want.

1/2

	global	medical doctors	nursing and midwifery	traditional and complementary	paramedics	veterinarians	other health professionals
attractive salary & benefits	62%	65%	65%	53%	68%	82%	68%
work-life balance	58%	54%	59%	61%	60%	68%	62%
job security	56%	55%	60%	52%	58%	77%	60%
pleasant work atmosphere	55%	51%	58%	57%	64%	66%	61%
financially healthy	49%	52%	49%	55%	46%	50%	48%
career progression	49%	45%	50%	46%	51%	69%	54%
good training	47%	45%	52%	54%	42%	60%	54%
strong management	44%	39%	42%	47%	44%	66%	42%
COVID-19 safe work environment	43%	46%	46%	45%	41%	67%	41%
location	41%	35%	40%	34%	48%	48%	44%
interesting job content	40%	42%	39%	44%	44%	44%	42%
very good reputation	39%	39%	36%	43%	33%	43%	36%
possibility to work remotely	38%	26%	28%	37%	27%	20%	29%
diversity & inclusion	37%	32%	36%	44%	34%	49%	38%
gives back to society	35%	35%	39%	44%	25%	39%	31%
uses latest technologies	30%	30%	26%	32%	22%	28%	22%

what the healthcare workforce wants.

2/2

	global	medical and pharmaceutical technicians	nursing and midwifery associates	traditional and complementary medicine associates	veterinary technicians and assistants	other health associate professionals	personal care workers in health services
attractive salary & benefits	62%	53%	42%	32%	43%	66%	58%
work-life balance	58%	52%	38%	30%	38%	73%	59%
job security	56%	53%	33%	39%	56%	65%	55%
pleasant work atmosphere	55%	50%	48%	27%	50%	65%	60%
financially healthy	49%	42%	37%	31%	48%	55%	54%
career progression	49%	43%	39%	31%	17%	59%	43%
good training	47%	45%	38%	25%	39%	61%	48%
strong management	44%	46%	31%	20%	57%	49%	53%
COVID-19 safe work environment	43%	43%	31%	31%	8%	50%	46%
location	41%	45%	23%	27%	27%	43%	42%
interesting job content	40%	30%	40%	21%	62%	40%	37%
very good reputation	39%	35%	33%	20%	32%	39%	32%
possibility to work remotely	38%	35%	29%	17%	10%	41%	27%
diversity & inclusion	37%	43%	17%	23%	13%	53%	42%
gives back to society	35%	33%	24%	31%	11%	42%	38%
uses latest technologies	30%	29%	17%	28%	26%	33%	28%

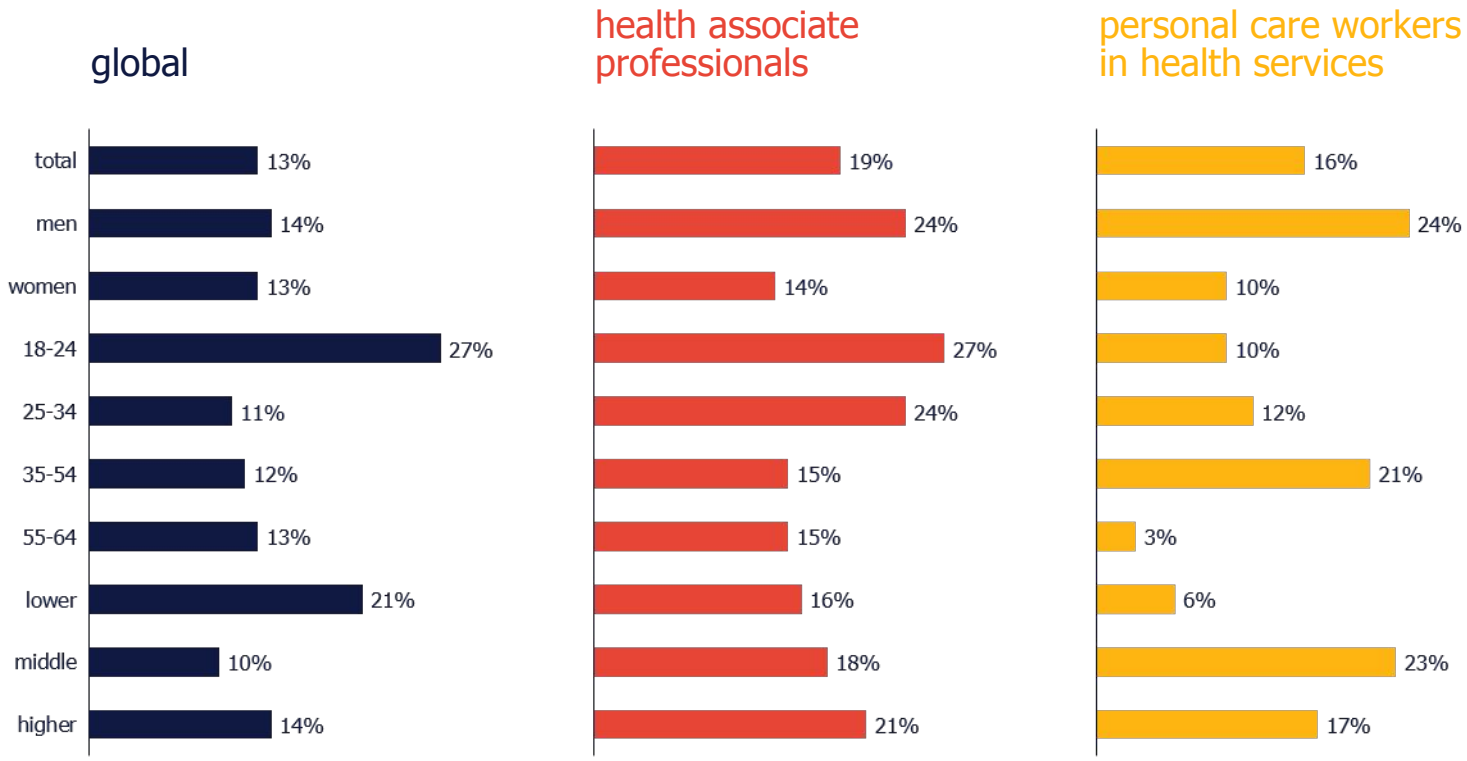
job switching

behavior

switching behavior among the healthcare workforce by socio-demographics.

switchers

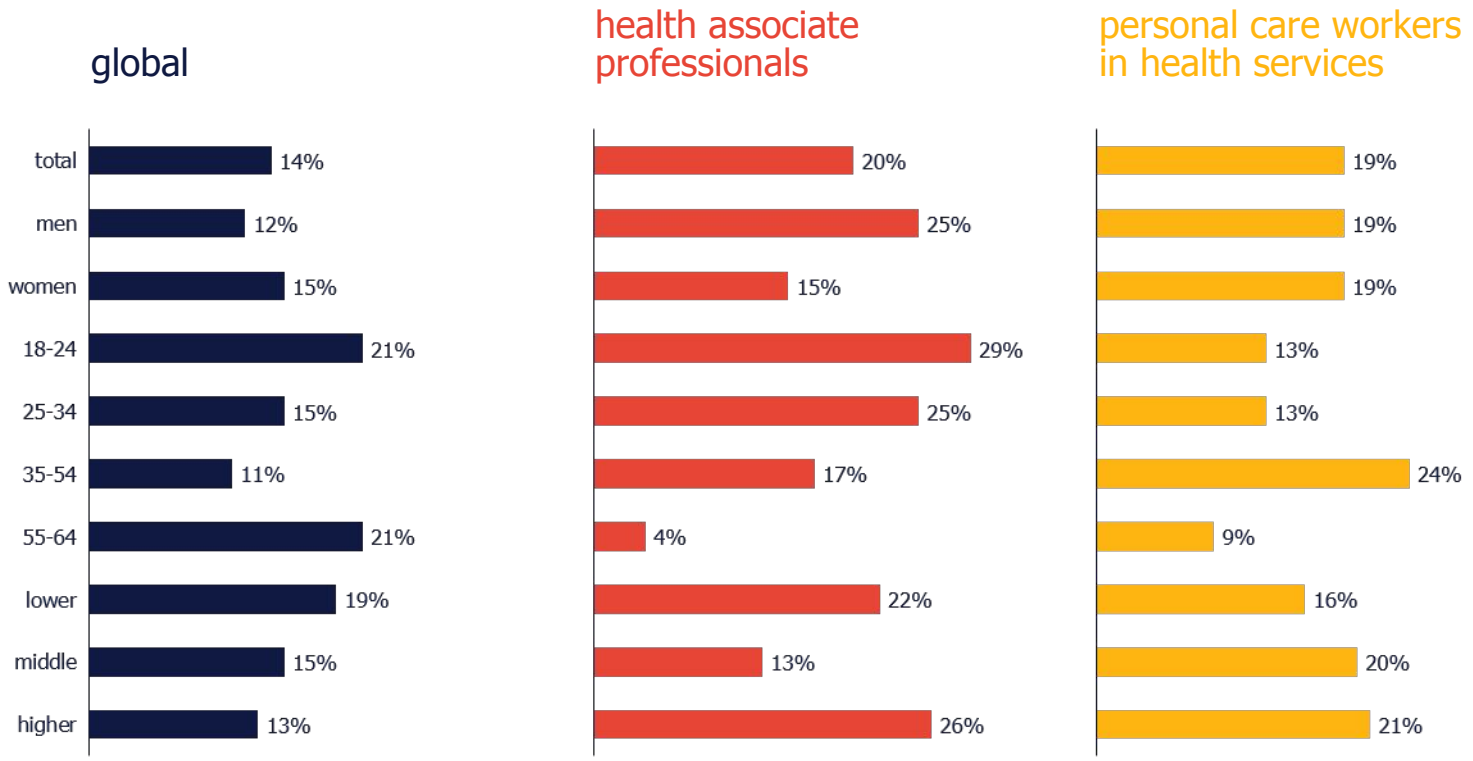
base: health professionals, health associates and personal care workers in health services



switching behavior among the healthcare workforce by socio-demographics.

intenders

base: health professionals, health associates and personal care workers in health services



about the

research.

what is the randstad employer brand research?

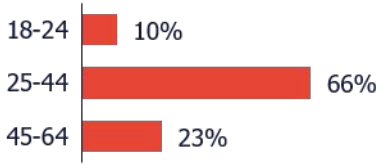
- a representative employer brand research based on perceptions of the general audience. Optimizing 21 years of successful employer branding insights.
- an independent survey with over 190,000 respondents in 34 markets worldwide.
- a reflection of employer attractiveness for each market's largest employers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

definition and sample composition of the healthcare sector.

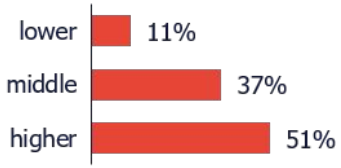
1/2

gender

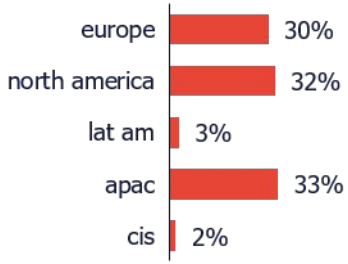
age



education



region



employment situation

total sample of healthcare sector: n= 9,296
fieldwork: between January and February 2021

definition and sample composition of the healthcare professions.

2/2

healthcare profession definitions

health professionals	health associate professionals	personal care workers in health services
medical doctors	medical and pharmaceutical technicians	personal care workers in health services
nursing and midwifery professionals	nursing and midwifery associate professionals	
traditional and complementary medicine professionals	traditional and complementary medicine associate professionals	
paramedical practitioners	veterinary technicians and assistants	
veterinarians	other health associate professionals	
other health professionals		

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

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

markets surveyed

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

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

fieldwork
- online interviews
- between January and February 2021

length of interview
- 16 minutes

breakdown of healthcare sector survey respondents by market.

country*	n=
argentina	4,721
australia	6,850
austria	3,853
belgium	14,100
brazil	3,770
canada	3,590
china	4,360
czech republic	4,750
france	7,906
germany	3,900
greece	3,600
hong kong	2,630
hungary	7,606
india	3,616
italy	6,581
japan	5,695
kazakhstan	3,502

country*	n=
luxembourg	1,503
malaysia	2,523
mexico	7,420
netherlands	13,245
new zealand	4,152
norway	3,871
poland	4,931
portugal	5,126
romania	4,700
russia	13,842
singapore	3,003
spain	9,973
sweden	4,716
switzerland	4,301
ukraine	6,703
UK	9,082
US	3,804

*global data is weighted on GDP

employer brand research setup.

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

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

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human forward.