

2025 NATIONAL HEALTHCARE WORKFORCE SURVEY

Hope, Mission and Turning the Tide

Healthcare workers are confident in their ability to drive positive change. They should be given the opportunity to do so.

Overview

Is the tide turning?

Over the past three years, we've surveyed nurses and physicians on job satisfaction, trust in leaders, elements of their day-to-day work, professional development and internal engagement/communications.

Today, those issues – which are generally internal to each clinician's organization – are being drowned out by news and activity around healthcare policy.

The question is, how has this added layer of complexity affected the views of the healthcare workforce? With the sweeping budget bill now signed into law, the possibility of massive change has turned into the reality of it, and healthcare organizations must navigate both internal and external expectations, questions and needs.

As public views change and concerning policies and funding cuts are implemented, are healthcare workers rallying around their organizations and gaining confidence in their leaders? Or do they remain skeptical and frustrated by ongoing internal issues?

The answer to that broad question mattered in May when we fielded this survey and the shape of change was still vague. Now, with far more clarity, the answer matters even more as provider organizations take steps to respond and position themselves for the future.

We asked doctors, nurses and other clinical staff about:

- » Job satisfaction and healthcare's biggest challenges
- » The state of U.S. healthcare, including equity
- » Individuals' self-perceived ability to affect change...and whether they feel they are empowered to do so
- » Views on current healthcare policy
- » Trust in their healthcare leaders to guide their organization through change and challenge
- » The quality of internal communications and engagement
- » How the public obtains and uses health information, and whether this affects the delivery of care

Key Findings

1

Despite systemic challenges to healthcare, those that affect clinicians' day-to-day are viewed as most significant

2

Healthcare workers are confident they can help drive change...but say provider organizations aren't letting them

3

Longer-tenured clinicians and those dissatisfied with their work tend to be more skeptical in general

4

The "why" still wins:
A deep sense of mission and joy for caring for patients are primary motivators for healthcare workers



Job Satisfaction & the State of Healthcare

Job satisfaction is generally holding steady

As a practicing healthcare worker, how satisfied are you with your job?

OVERALL

32% Very satisfied

40% Somewhat satisfied

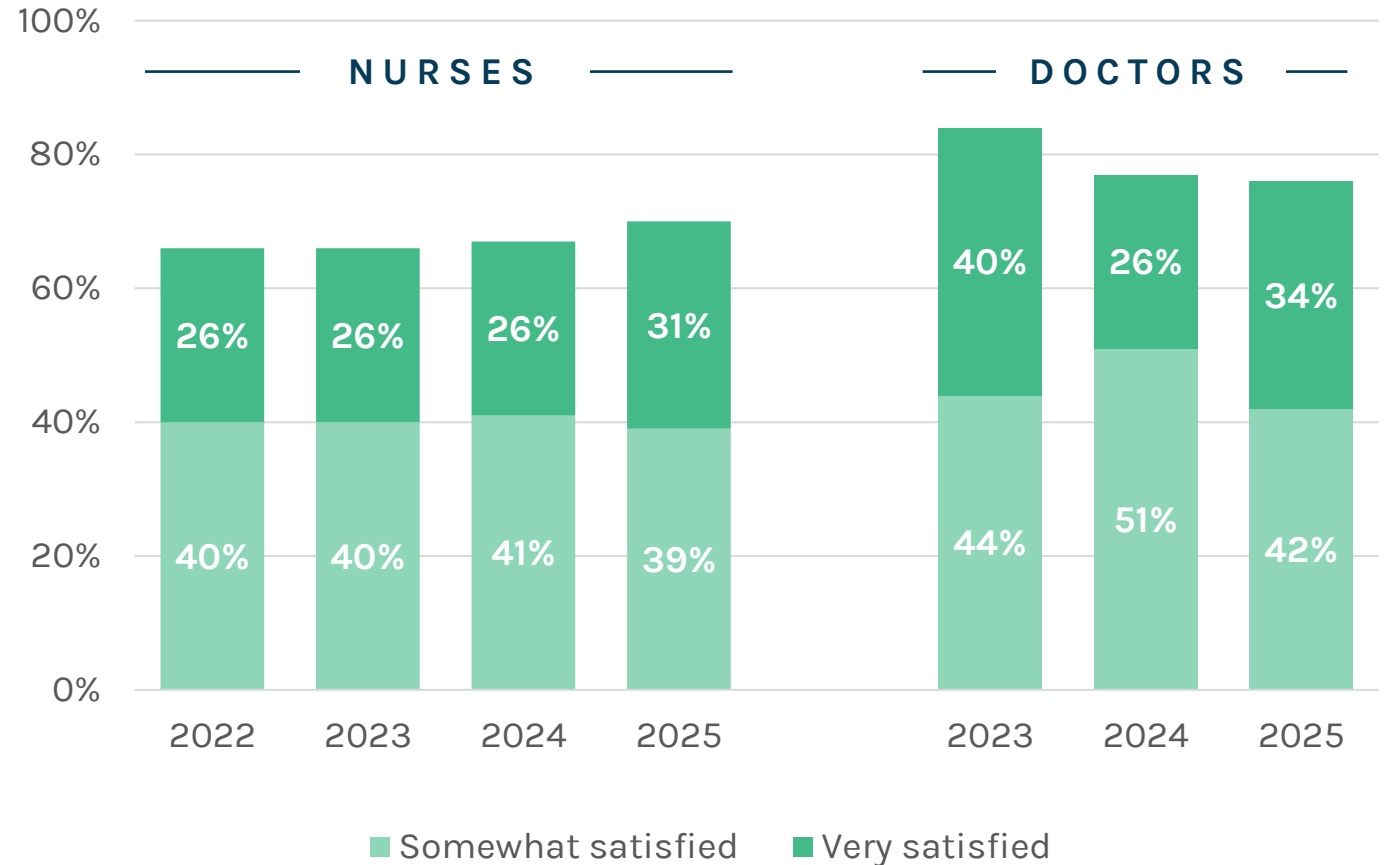
14% Neutral

10% Somewhat dissatisfied

4% Very dissatisfied

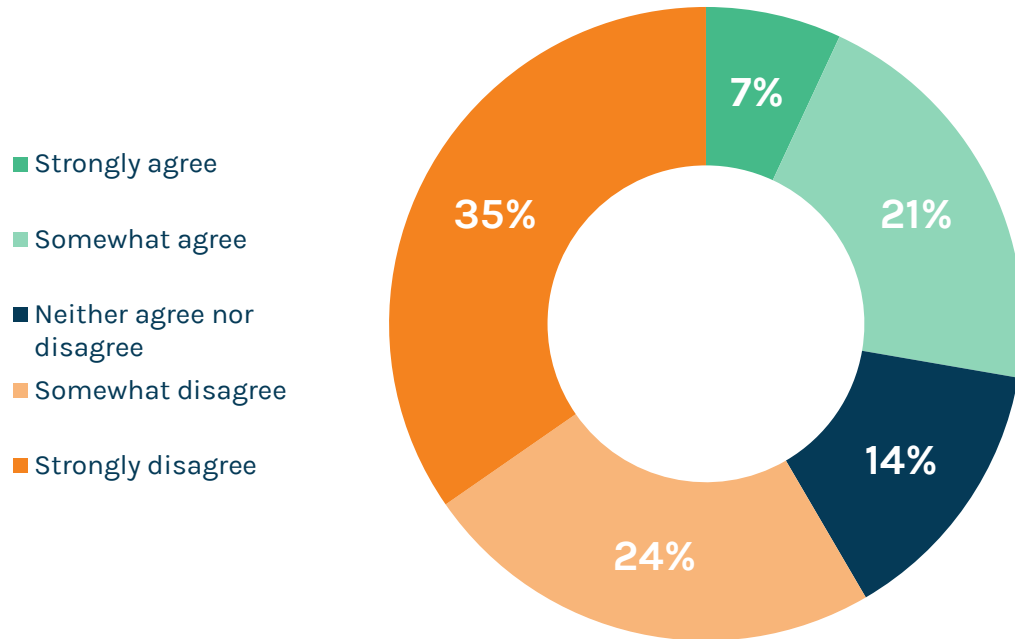
Though there is little difference in job satisfaction between demographics, older clinicians and men express slightly higher levels of satisfaction.

Other clinical roles express similar levels of job satisfaction: **32%** / **37%** / **13%** / **11%** / **7%**



While six in 10 say U.S. healthcare is not equitable...

Please indicate whether you agree or disagree with the following statement: *“The U.S. healthcare system is fair, and everyone can get the medical care they need.”*

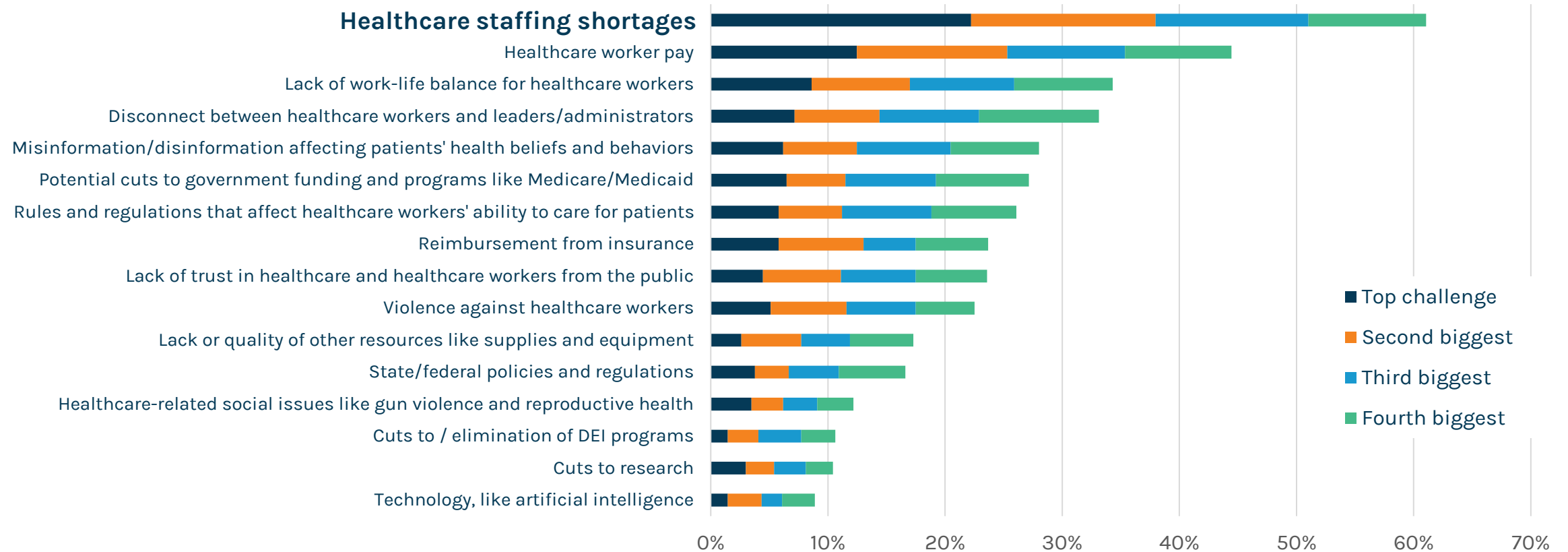


	NURSES (566)	PHYSICIANS (364)	OTHER CLINICAL (108)
Strongly agree	6%	8%	9%
Somewhat agree	19%	22%	17%
Total agree	25%	30%	26%
Neither agree nor disagree	14%	17%	14%
Total disagree	61%	53%	60%
Somewhat disagree	23%	25%	23%
Strongly disagree	38%	28%	37%

Physicians are more likely than their clinical colleagues to say that healthcare is equitable

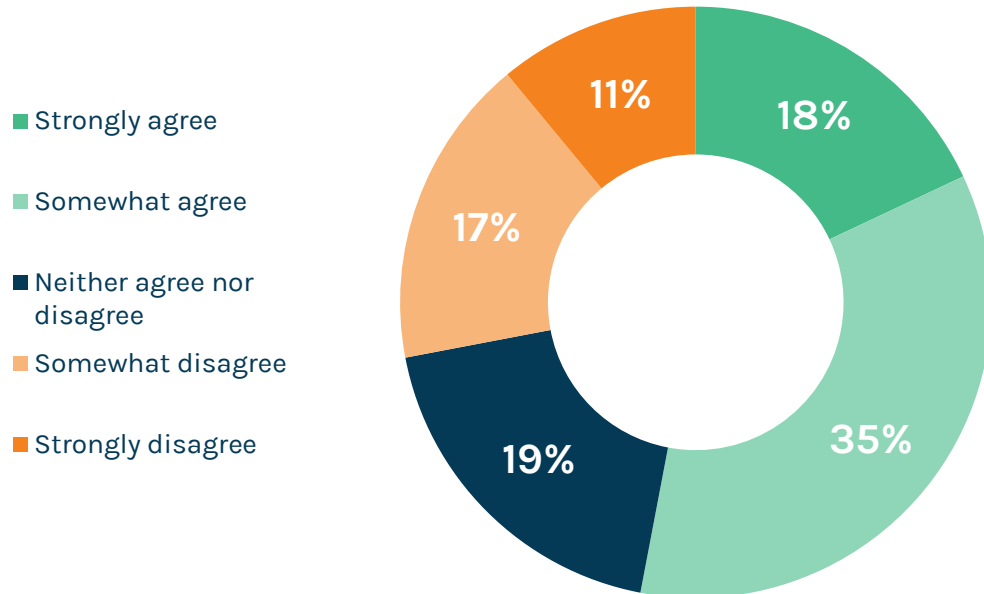
...But staffing and pay are viewed as the most significant challenges – by far

Which of the following are the biggest challenges/problems facing healthcare today?



Just over half agree that their organization gives them a role in solving big challenges

Please indicate whether you agree or disagree with the following statement: *“My organization involves me and my colleagues in finding productive ways to respond to the major challenges facing healthcare?”*



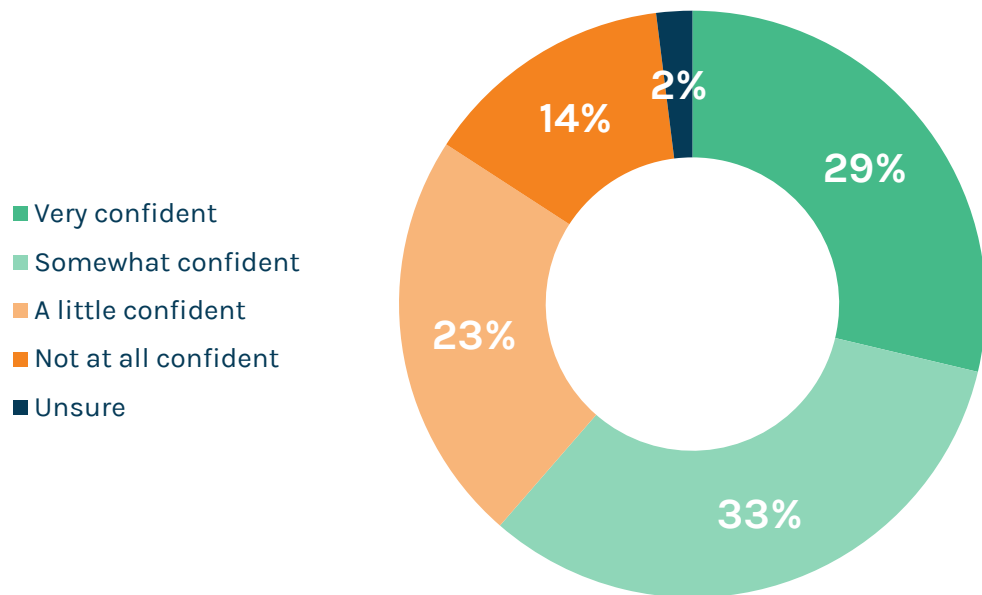
	NURSES (566)	PHYSICIANS (364)	OTHER CLINICAL (108)
Strongly agree	15%	22%	19%
Somewhat agree	33%	41%	30%
Total agree	48%	63%	49%
Neither agree nor disagree	20%	16%	19%
Total disagree	32%	21%	31%
Somewhat disagree	19%	14%	17%
Strongly disagree	13%	7%	16%

Physicians are far more likely to say they’re afforded a role in tackling challenges

Men are slightly more likely to agree that their organization involves them (58% total agree vs 51% of women). And while 64% of those who are satisfied with their job say their organization involves them, only 27% of those who are dissatisfied say the same.

Nearly two-thirds are confident they can personally make a difference

Regardless of whether you think your organization involves you, how much do you think you as an individual can drive positive change related to the major challenges facing healthcare?



Nurses and other clinical staff express slightly more confidence in their personal ability to effect change

	NURSES (566)	PHYSICIANS (364)	OTHER CLINICAL (108)
Very confident	29%	28%	29%
Somewhat confident	34%	30%	35%
Total confident	63%	58%	66%
Total not confident	36%	40%	32%
A little confident	23%	24%	21%
Not at all confident	13%	16%	11%
Unsure	1%	1%	4%

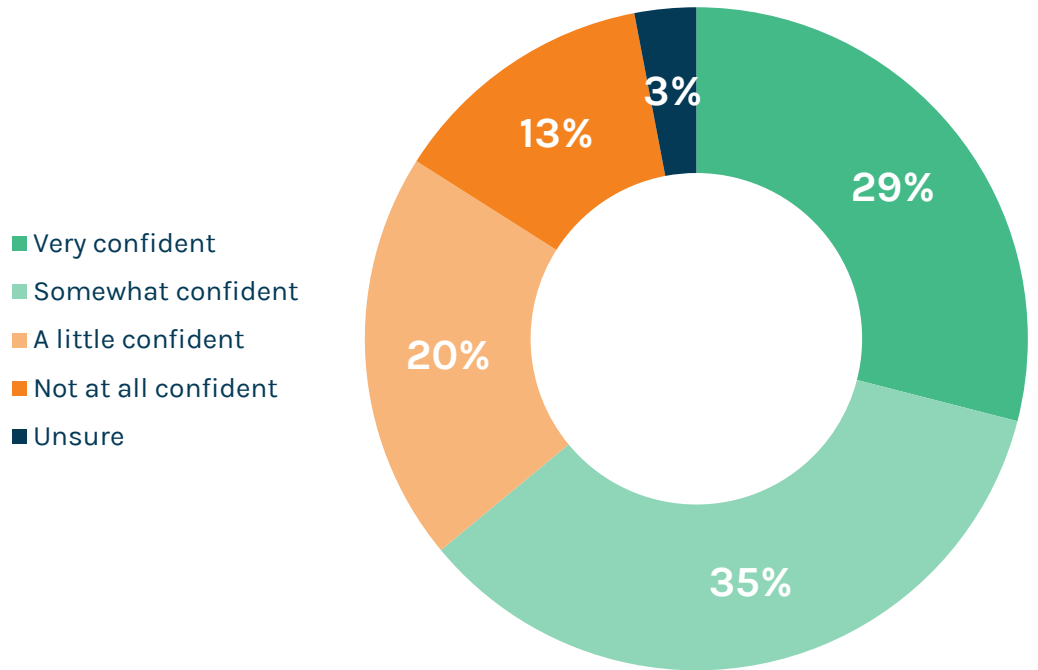
One's confidence in their ability to effect change declines with age. While 64% of those 34 and younger say they are confident, only 58% of those 55-64 and 47% of those 65 and older do.



Trust & Leadership

There is optimism towards leaders' decision-making when it comes to healthcare's macro challenges...

How confident are you that the leaders of your organization will make positive decisions to address the major challenges facing healthcare?

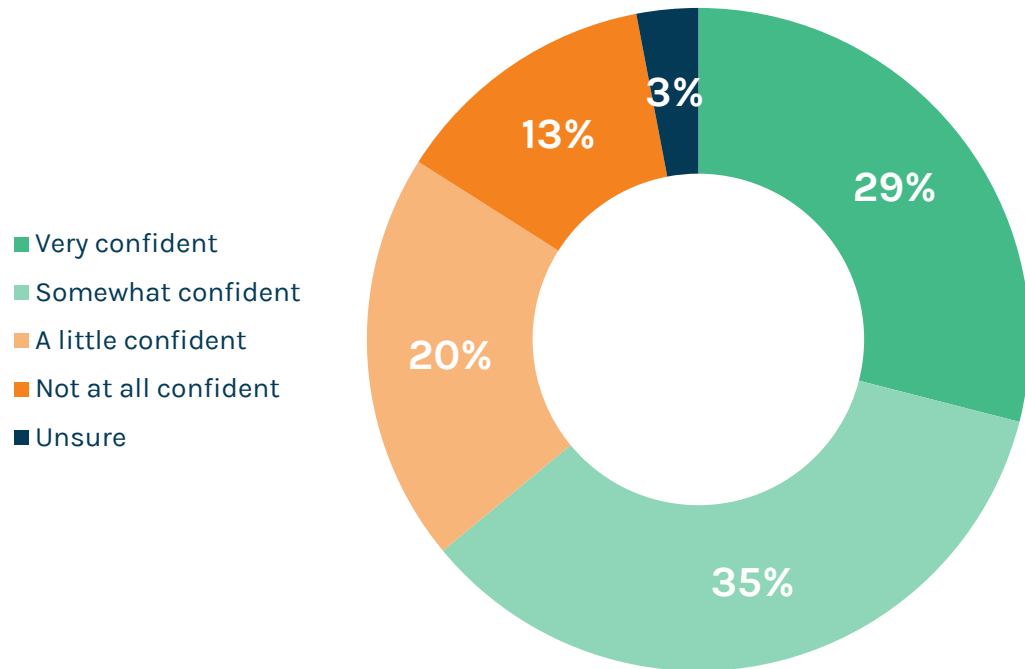


	NURSES (566)	PHYSICIANS (364)	OTHER CLINICAL (108)
Very confident	25%	33%	31%
Somewhat confident	35%	35%	31%
Total confident	60%	68%	62%
Total not confident	36%	28%	33%
A little confident	22%	17%	22%
Not at all confident	14%	11%	11%
Unsure	3%	4%	6%

Confidence declines with tenure and lower job satisfaction. More than two thirds (68%) of those who have been in healthcare for 10 years or less express confidence in their leaders, compared to 60% of those who have worked in the industry longer than 10 years. And while 72% of those who are satisfied in their job express confidence, only 35% of those who are not satisfied do.

Those in primary care and health services express greater confidence than those working in hospitals

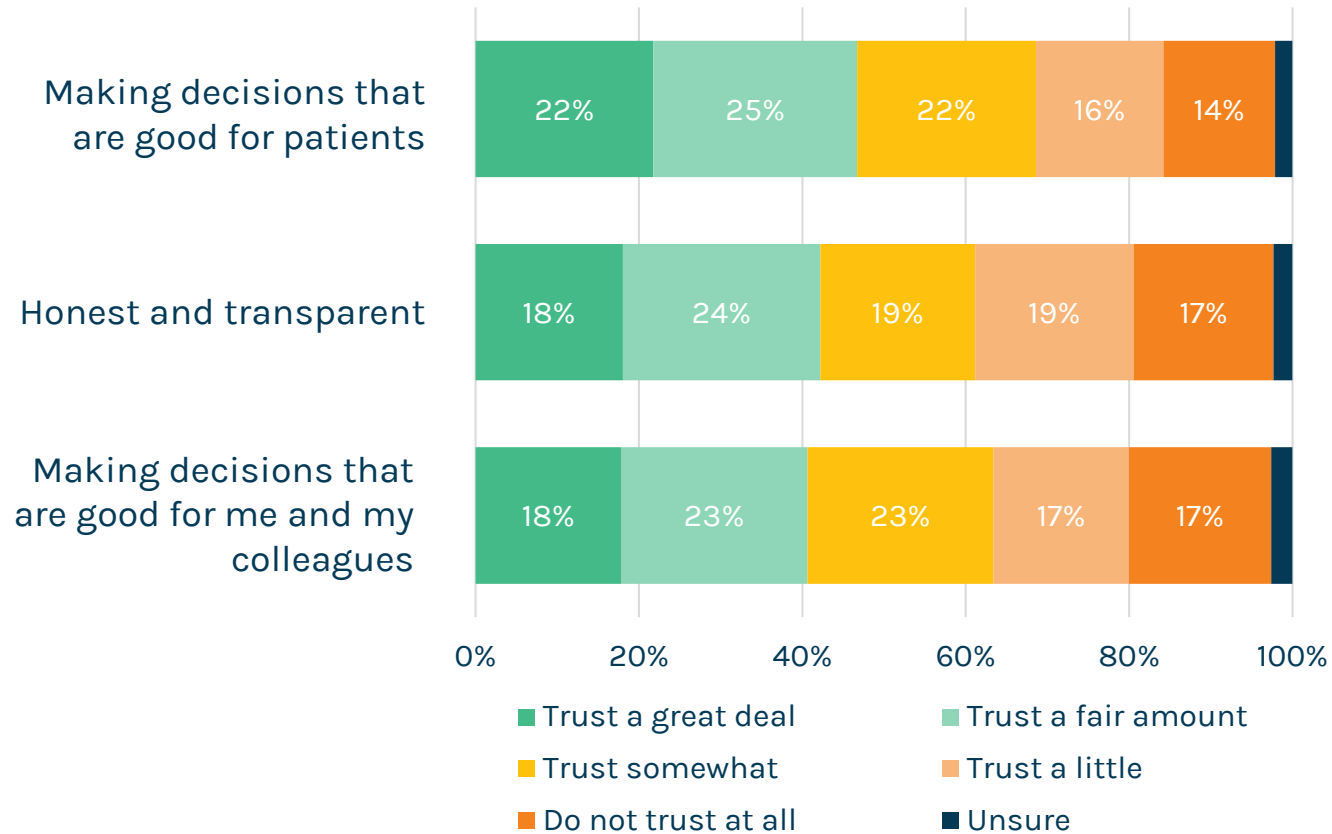
How confident are you that the leaders of your organization will make positive decisions to address the major challenges facing healthcare?



	HOSPITAL (508)	PRIMARY CARE (154)	HEALTH SERVICES (375)
Very confident	21%	44%	32%
Somewhat confident	36%	34%	33%
Total confident	57%	78%	65%
Total not confident	40%	21%	31%
A little confident	25%	13%	18%
Not at all confident	15%	8%	13%
Unsure	4%	1%	4%

...But ongoing skepticism about their internal leadership

Now, how much do you trust that the leaders of your organization are...

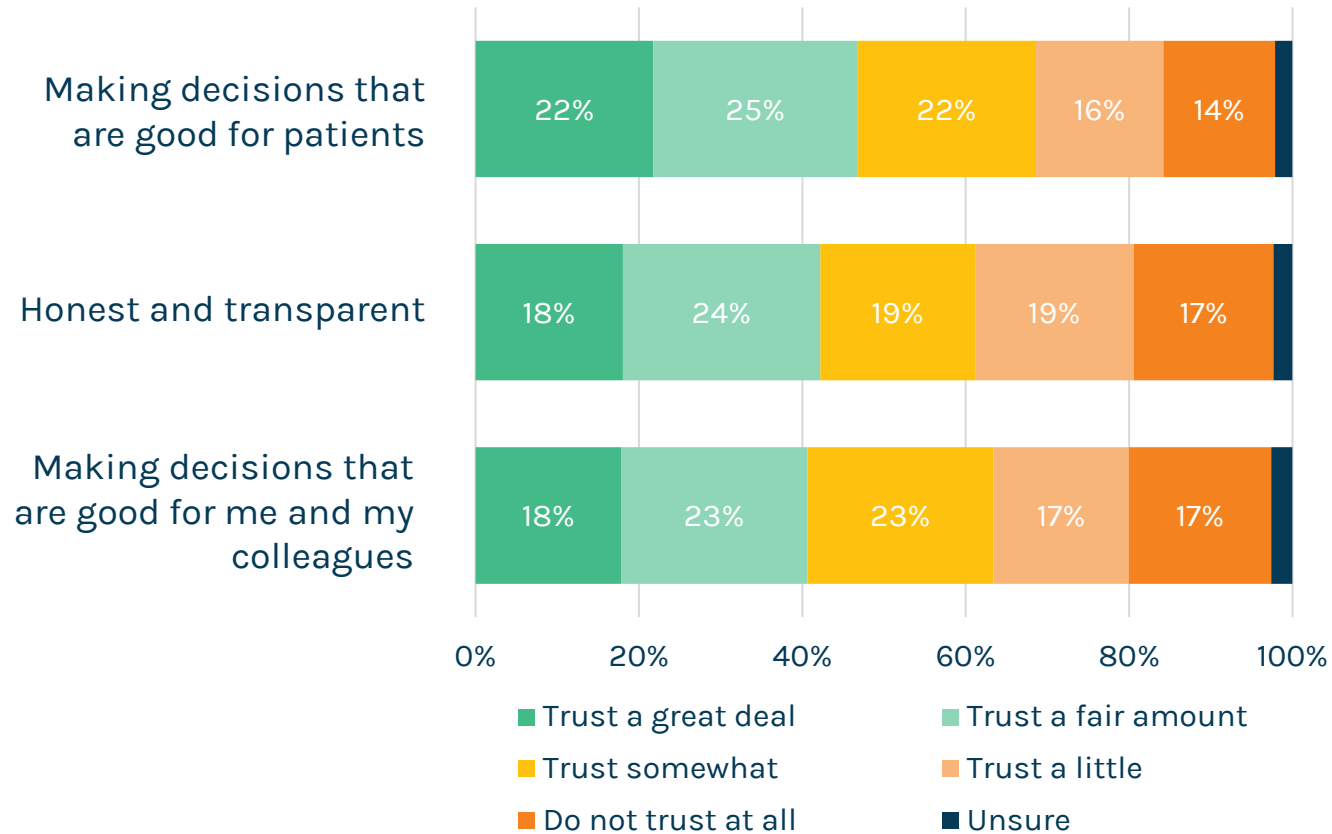


Physicians are far more likely to express trust in leaders than their clinical colleagues

Total Trust	NURSES (566)	PHYSICIANS (364)	OTHER CLINICAL (108)
Decisions good for patients	42%	55%	45%
Honest & transparent	36%	53%	37%
Decisions good for me/colleagues	36%	48%	40%

Hospital-based healthcare workers express markedly lower trust in their leaders

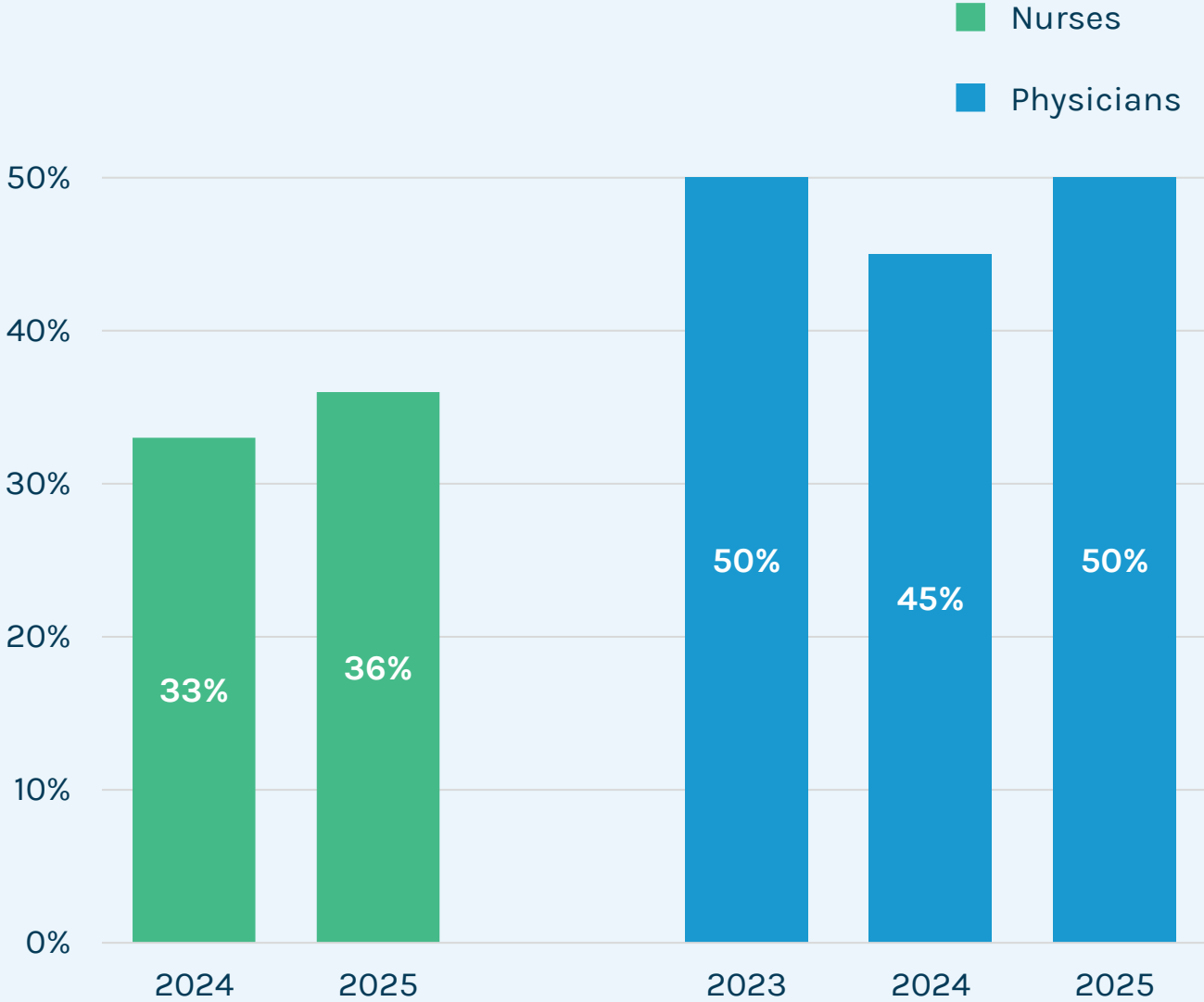
Now, how much do you trust that the leaders of your organization are...



Total Trust	HOSPITAL (508)	PRIMARY CARE (154)	HEALTH SERVICES (375)
Decisions good for patients	41%	59%	50%
Honest & transparent	37%	59%	44%
Decisions good for me/colleagues	34%	52%	43%

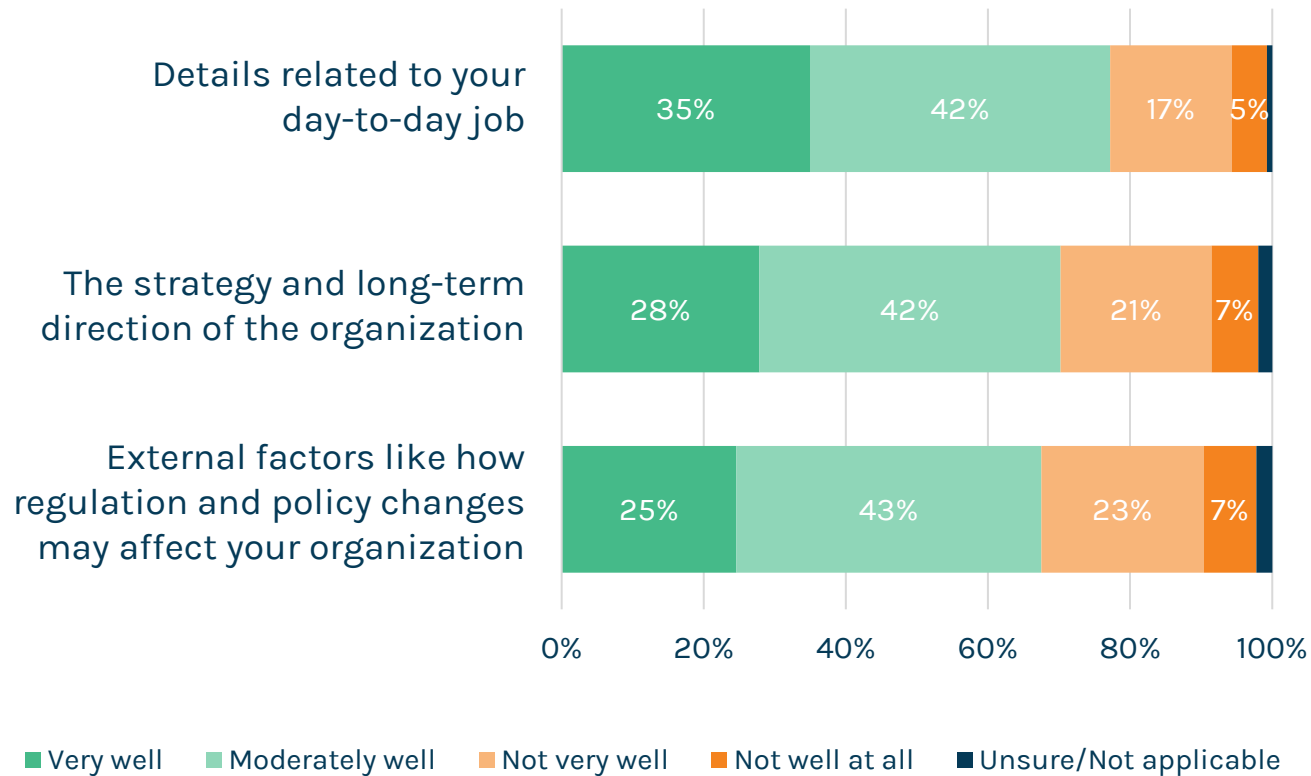
Trust has remained relatively stable over the past few years

*Now, how much do you trust that the leaders of your organization are **honest and transparent**?*



Internal communication is a bright spot and a strength to be leveraged to build trust

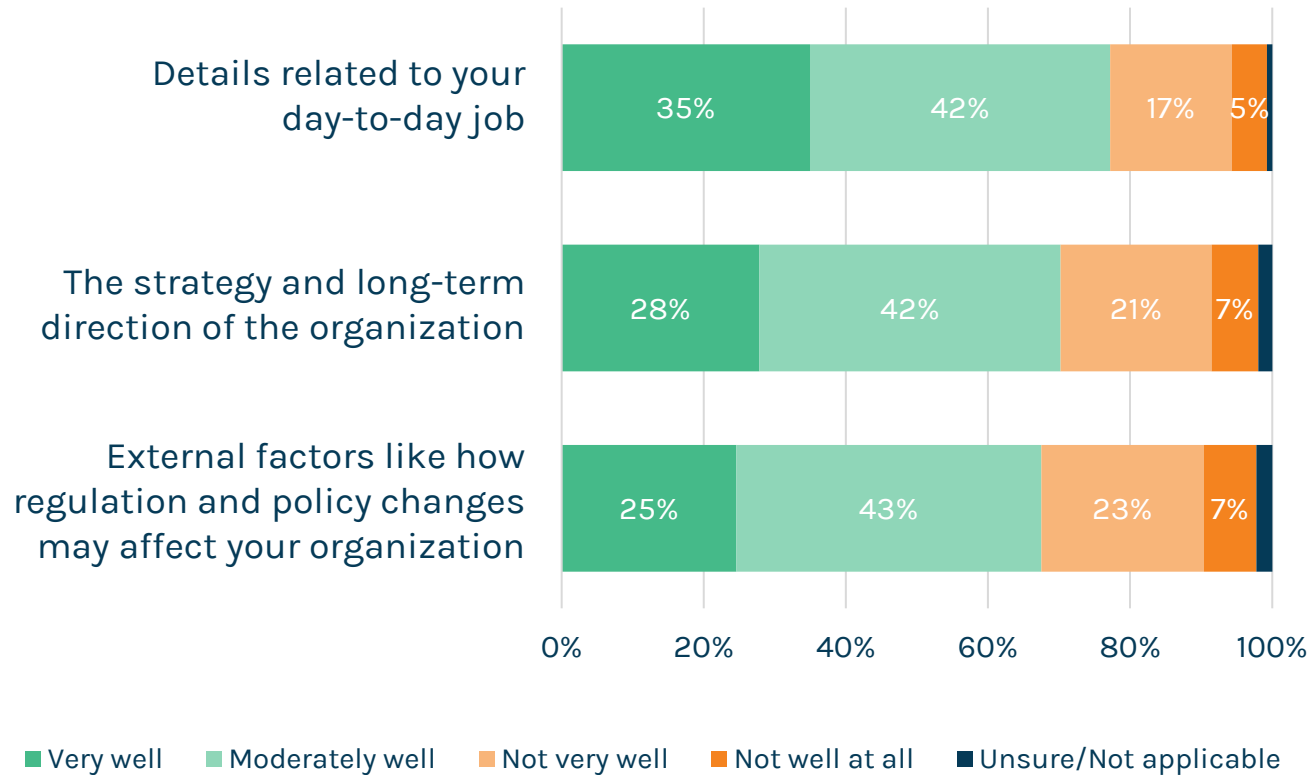
How well does the leadership of your organization communicate about...



Very + Moderately Well	NURSES (566)	PHYSICIANS (364)	OTHER CLINICAL (108)
Day-to-day details	76%	77%	80%
Strategy & direction	68%	74%	71%
External factors	66%	71%	70%

Those in primary care and health services give their leaders better marks on communications

How well does the leadership of your organization communicate about...



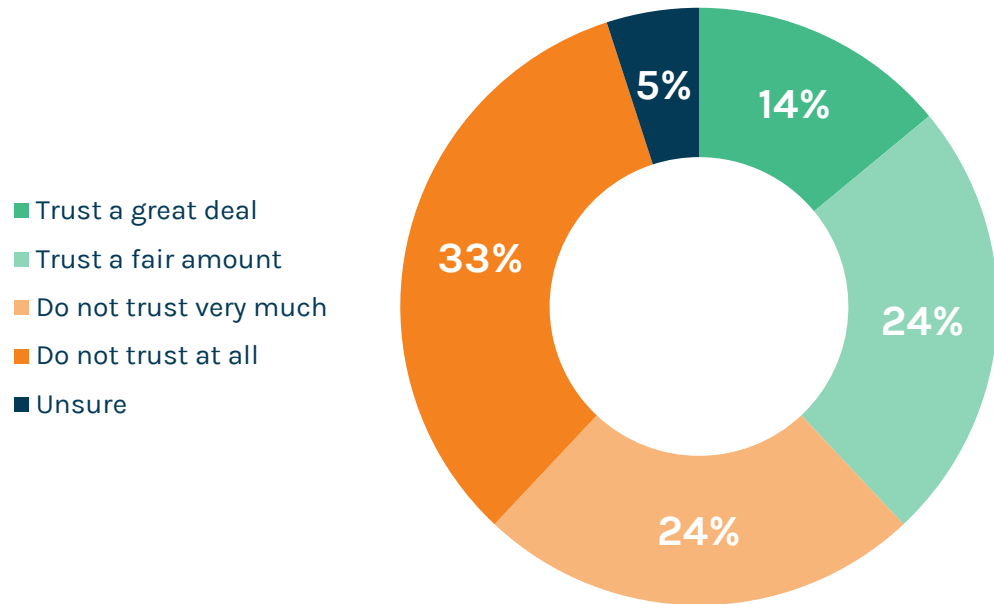
Very + Moderately Well	HOSPITAL (508)	PRIMARY CARE (154)	HEALTH SERVICES (375)
Day-to-day details	73%	85%	79%
Strategy & direction	67%	77%	73%
External factors	63%	77%	72%



Trust & Policy

Over half express little to no trust in the current administration on healthcare issues

Thinking about the Trump administration, including Robert F. Kennedy Jr. and Dr. Mehmet Oz, how much do you trust that the new administration will make positive changes for the U.S. healthcare system and prioritize issues that will improve the health and wellbeing of Americans?

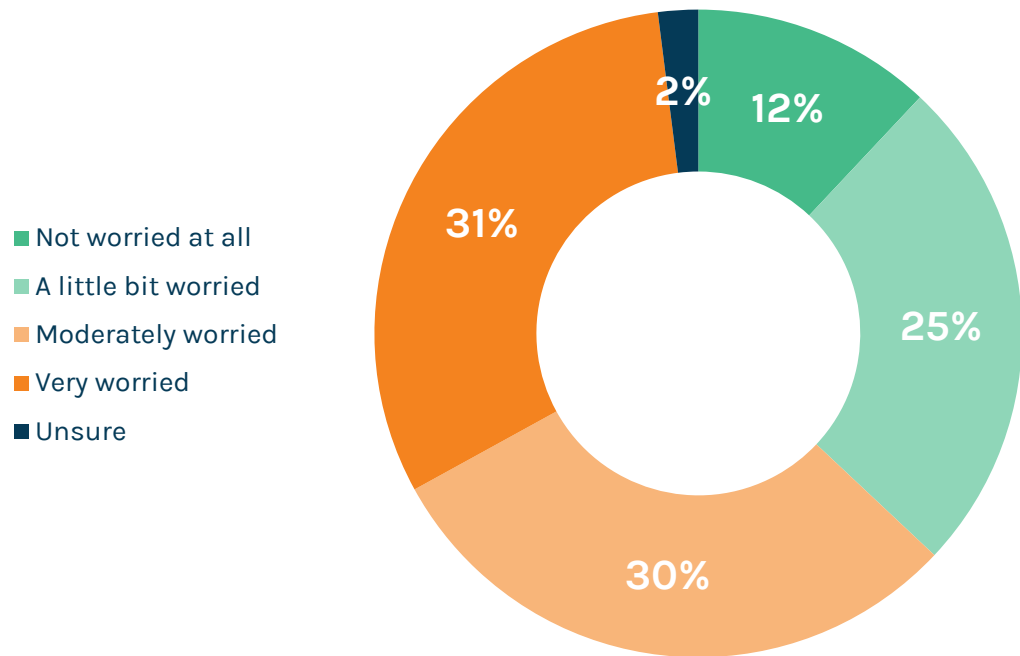


	NURSES (566)	PHYSICIANS (364)	OTHER CLINICAL (108)
Trust a great deal	12%	17%	15%
Trust a fair amount	25%	24%	19%
Total trust	37%	41%	34%
Total do not trust	57%	55%	59%
Do not trust very much	23%	23%	31%
Do not trust at all	34%	32%	28%
Unsure	6%	3%	7%

These numbers mirror the general public. In April 2025, 54% of adults expressed little to no trust in the administration when it comes to healthcare issues.

Six in 10 are worried about federal funding cuts, with physicians slightly more concerned than others

As you may know, the federal government has frozen funding to some higher education and healthcare organizations. How worried are you that these federal decisions will have a negative effect on your organization?

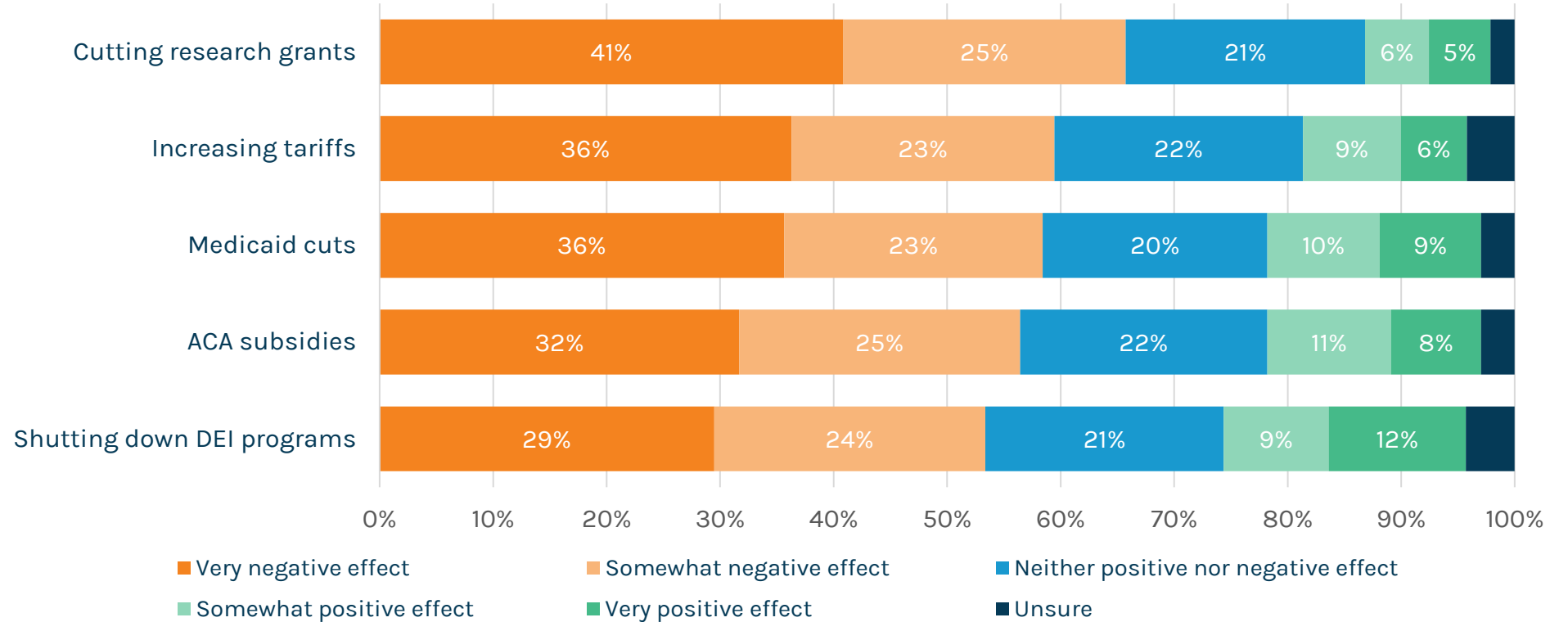


	NURSES (566)	PHYSICIANS (364)	OTHER CLINICAL (108)
Not worried at all	12%	14%	9%
A little bit worried	26%	20%	31%
Total not worried	38%	34%	40%
Total worried	60%	65%	58%
Moderately worried	29%	33%	31%
Very worried	31%	32%	27%
Unsure	2%	1%	2%

A majority expect negative outcomes from other policy changes, with cuts to research of highest concern

*Do you think the following government actions will have a positive effect, negative effect or no effect on your organization's ability to care for patients?**

Physicians are slightly less concerned about Medicaid cuts, with 54% saying they will have a negative effect, compared to 63% of nurses and 59% of other clinical roles.



*Question text has been abbreviated here for clarity. See slide 22 for full text.

Full text questions

*As you may also know, Medicaid provides free or low-cost health insurance for low-income adults as well as children, pregnant women, people with disabilities and others. At the same time, Medicaid has been identified as a potential source of waste and a way to pay for tax cuts, and the U.S. Congress is considering making cuts to the program. Thinking about you and your organization's ability to care for patients, **do you think cuts to Medicaid would have a positive effect, negative effect or no effect on your organization's ability to care for patients?***

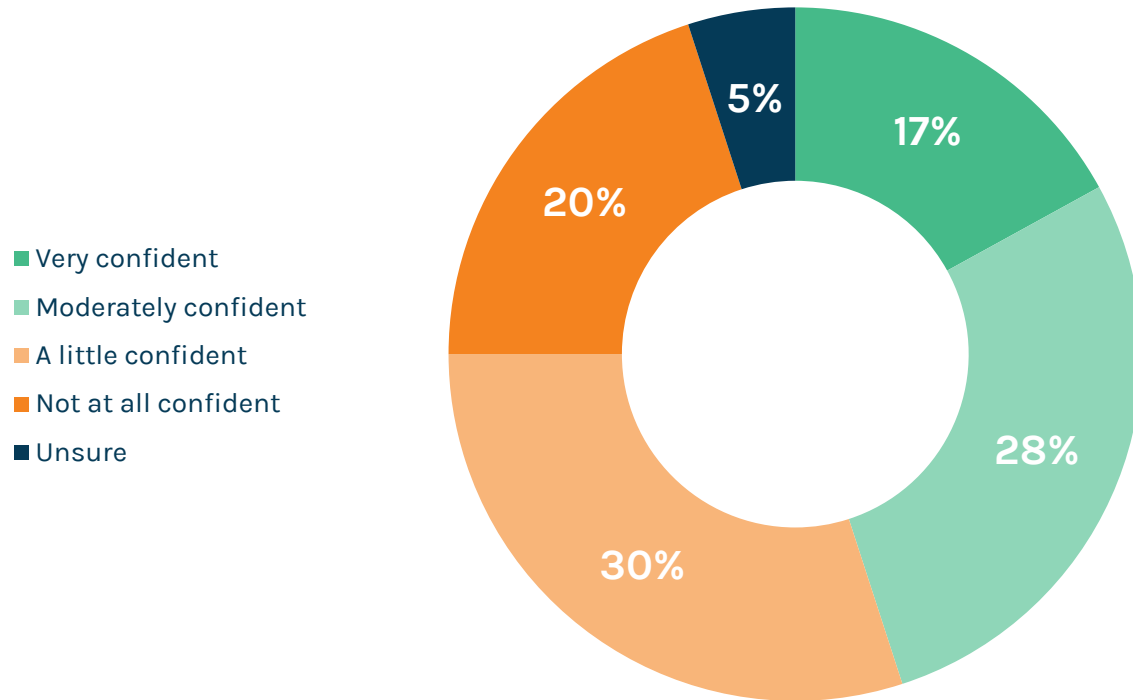
*Similarly, the federal government helps low- and middle-income families pay for private health insurance through the Affordable Care Act, or ACA. Recent reports suggest that Congress may not continue this program. Thinking about you and your organization's ability to care for patients, **do you think ending ACA subsidies would have a positive effect, negative effect or no effect on your organization's ability to care for patients?***

*Now thinking about other areas where the Trump administration and/or U.S. Congress is taking action, **do you think the following government actions will have a positive effect, negative effect or no effect on your organization's ability to care for patients?***

- » *Cutting research grants*
- » *Shutting down DEI programs*
- » *Increasing tariffs*

Barely half of physicians are confident their leaders are equipped to navigate **policy changes**, while only four in 10 nurses are

If funding cuts to programs like Medicaid or research grants do occur, how confident are you that the leaders of your organization are equipped and ready to handle that change?



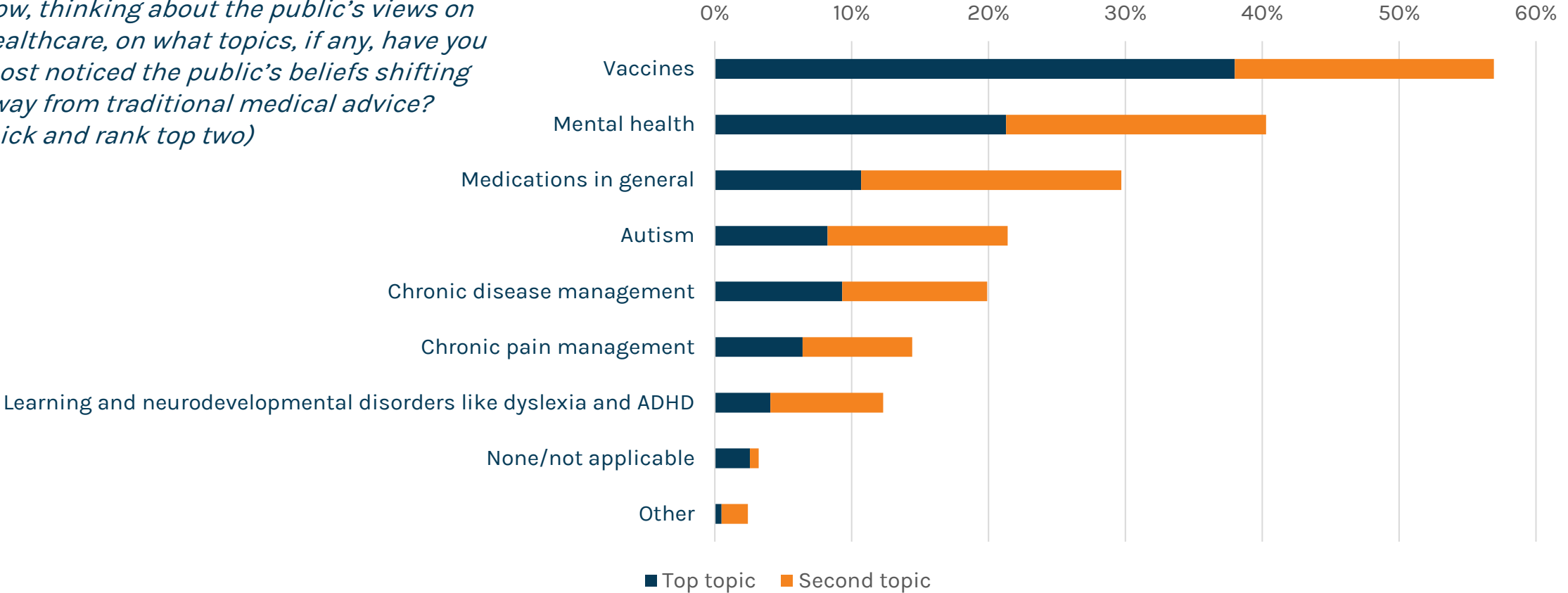
	NURSES (566)	PHYSICIANS (364)	OTHER CLINICAL (108)
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Moderately confident	26%	33%	25%
Total confident	41%	51%	45%
Total not confident	55%	45%	46%
A little confident	32%	28%	27%
Not at all confident	23%	17%	19%
Unsure	5%	4%	9%



Views on the Public & Health Information

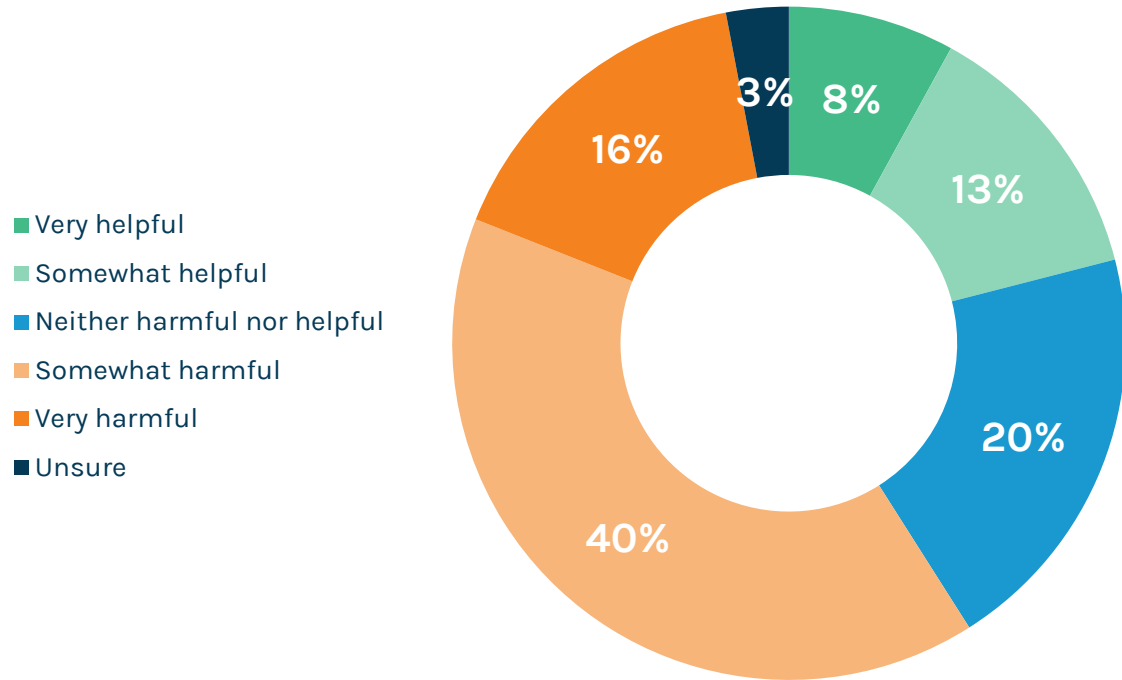
After vaccines, clinicians see public perception changing most on mental health and medications

Now, thinking about the public's views on healthcare, on what topics, if any, have you most noticed the public's beliefs shifting away from traditional medical advice? (pick and rank top two)



Over half say the public's views towards healthcare are problematic

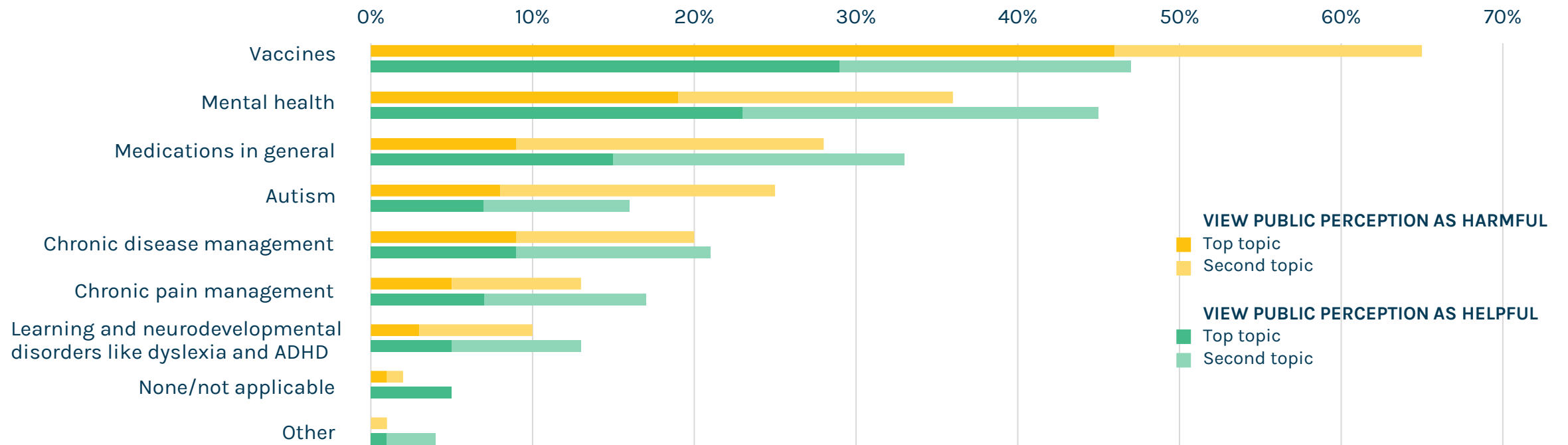
Do you think public attitudes about healthcare today helpful or harmful?



	NURSES (566)	PHYSICIANS (364)	OTHER CLINICAL (108)
Very helpful	8%	9%	6%
Somewhat helpful	12%	15%	11%
Total helpful	20%	24%	17%
Neither helpful nor harmful	20%	18%	28%
Total harmful	57%	54%	52%
Somewhat harmful	41%	39%	36%
Very harmful	16%	15%	16%
Unsure	4%	2%	3%

Clinicians who see shifts in public views on vaccines are more likely to say the public's views on healthcare are harmful

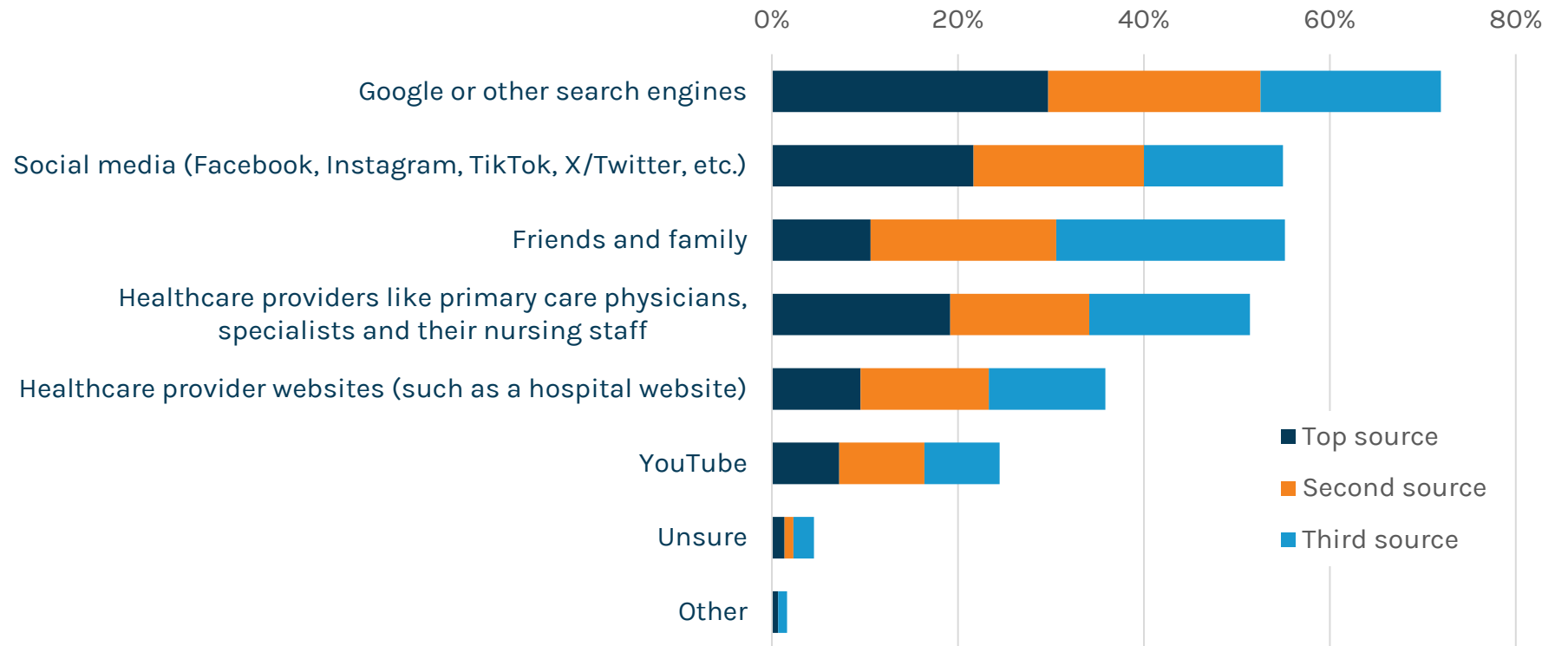
Now, thinking about the public's views on healthcare, on what topics, if any, have you most noticed the public's beliefs shifting away from traditional medical advice?(pick and rank top two)



Clinicians say patients are as or more likely to get information from the web as from medical professionals

Where do patients and the public turn to for healthcare information? (Pick and rank top three)

When asked in January 2025 where they go for healthcare information, 59% said their PCP, 46% said Google/search and 42% said they use provider websites. **Only 30% selected social media.**



Facebook is perceived as the top social media source for healthcare information, though only 12% say they use it

Among the public,

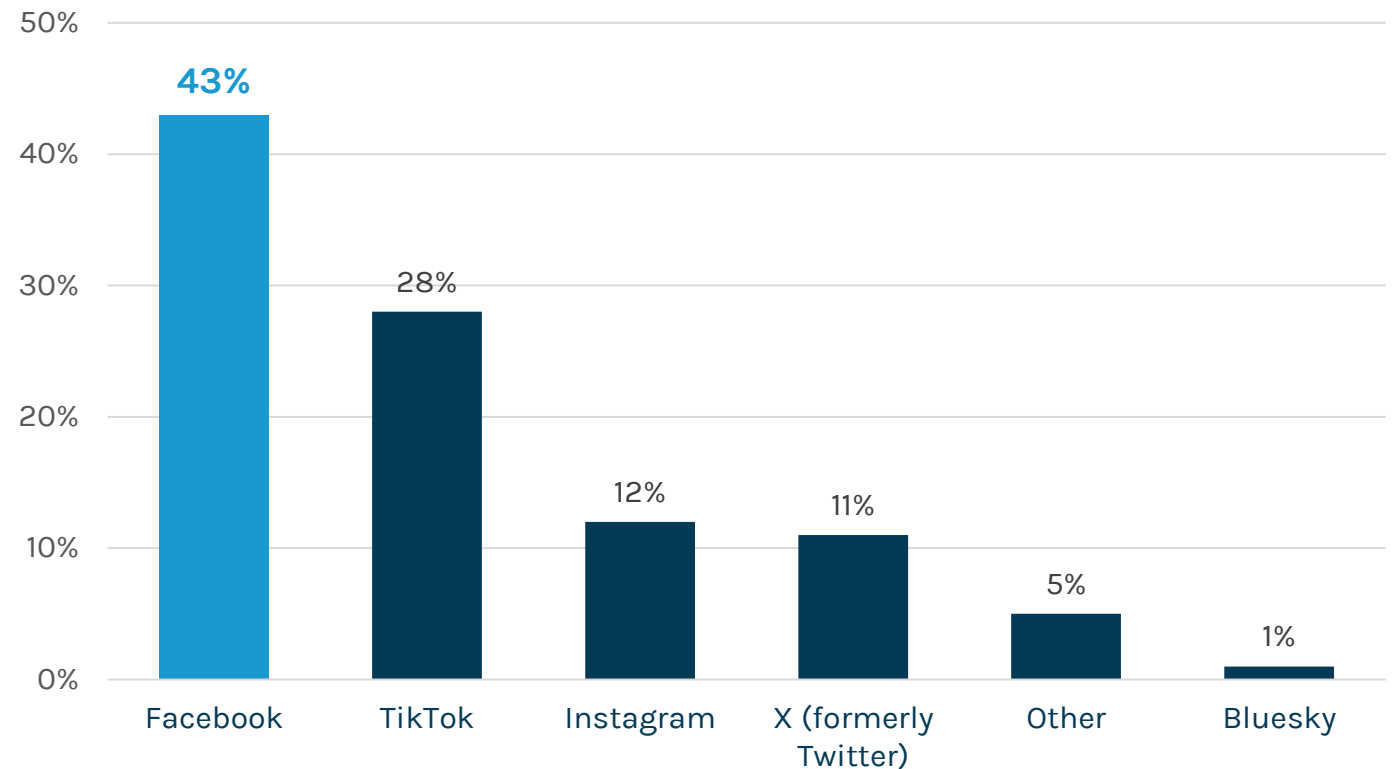
12%

say they **get** health information from Facebook

8% say X and TikTok (each), and 2% say Bluesky. Responses in “Other” included Google, YouTube and WebMD.

(Note: the question asked of the public was whether they get information from these platforms, not their top social media source.)

*Now thinking only about social media, which platform do you think patients and the public **turn to most** for healthcare information?*



Caring for patients and an underlying sense of mission are the biggest motivators for clinicians

We've asked about many challenging issues facing you and healthcare in general. Now thinking about the positive side of healthcare and your career, what most energizes you as a healthcare worker?

IMPROVING LIVES	IMPROVING HEALTH	THE MISSION OF CARE	THE CHALLENGE
<p>"I love knowing that the work I do makes a real difference in people's lives."</p> <p>"Being part of something that has an impact beyond just a job—it's about changing lives."</p> <p>"It's incredibly rewarding to help someone when they need it most."</p>	<p>"Seeing patients improve and knowing I had a hand in that keeps me going."</p> <p>"When a patient gets better and thanks you, it makes everything worth it."</p> <p>"The positive outcomes we achieve as a team are truly motivating."</p>	<p>I've always wanted to be a nurse—it's my calling."</p> <p>"Caring for others is what I love most about my job."</p> <p>"Being able to provide care to those in need is why I come to work every day."</p>	<p>"Every day brings a new challenge and a chance to improve someone's health."</p> <p>"I'm energized by seeing real progress—both in patients and in our systems."</p> <p>"It's motivating to be part of continuous improvement in healthcare."</p>

The work ahead

Now is not the time to back down on internal engagement.

In the current environment it could be easy to say, “There’s too much noise. We need to put our heads down and do the work, and let our people do the same.”

But that won’t work. The healthcare workforce doesn’t trust its leaders enough for those leaders to hold back. Instead, this is a moment to lean in, listen, learn and leverage what’s working – build on job satisfaction, commitment to mission and internal communications. This is a moment for accelerating internal engagement, proactively working to build and maintain trust. A moment to be clear about how the organization is hearing and acknowledging concerns – from staffing to health misinformation to healthcare policy – and addressing them while protecting the organization.

Doing this should include closing the gap between what individual healthcare workers believe they have to offer towards solving the industry’s biggest challenges and the level at which their organization involves (and trusts) them in doing so. Clinicians and employees are ready-made advocates and activists for the mission of providing care and driving change. Engage them in that work.

Despite the challenges facing the industry today, there is still a deep sense of mission among those providing care. This cannot be used as a way to take advantage of clinicians but instead as the foundation for involving them even more in the work of improving healthcare.

What it means for internal change

You can't do it alone. Successfully managing change requires the expertise, collaboration and buy-in of everyone it will affect. Your people are your not-so-secret superpower...as long as they're given the opportunity. They are your change management intelligence agents. For healthcare leaders looking to drive change – in other words, all leaders – here are a few workforce-centered ways for leaders to make the process more successful:

SEE POLICY AS AN OPERATIONAL ISSUE

At the end of the day, any big picture change has an operational implication. Healthcare workers' trust in leaders is mixed when it comes to addressing big challenges, navigating policy change and making good decisions. Start by clearly laying out the connection between how macro-level dynamics do or could affect the day-to-day performance at a micro level. Making that connection is the first step in making it more manageable for everyone.

USE YOUR PEOPLE

You will inherently have a different view of and perspective on change than your frontline team. But rather than create space between you and them, go to them. Hear what they're thinking. Understand them and then say, "Ok, given that we have this challenge, what do **you** see as next steps? What are we missing, what are we glossing over, what would you do, what would you need?" Your people are the ones best positioned to know how to operationalize change – and they have the confidence to make a difference. Use that well.

RESOURCE EFFECTIVELY

Change management needs resources to support expertise. In the crush of so many priorities today, it's easy to lose sight of that obvious fact. Without dedicated resources, none of those priorities can take root -- resourcing change management is a prerequisite, not an add-on. In addition, it's vital to provide support to those bringing you the ideas. One risk is to hear what people suggest and then say, "That's great, go for it." Instead say, "Your voice is what we need, now let us resource that work – and we'd love your help."

BRING IN EXPERTISE

Too often, change management is often left to administrative departments with limited operational background or authority (MarComm, HR and OD) with the organization using the vital work of **communicating** about change as a proxy for **operational resources**. Instead, each organization should have an interdisciplinary center of excellence positioned to collaboratively manage change, along with training and outside partners to help smooth the way and fill in gaps.

What it means for external brand

A brand grows and thrives when it provides an excellent experience – both for those working as well as for those receiving care. Indeed, brands start internally, and they are built most effectively over time when experience is aligned with strategy. What does this mean for healthcare leaders looking to strengthen their workforce...and their external reputation?

KNOW WHERE YOUR INTERNAL STAKEHOLDERS STAND

The key to trust and reputation lies in the credibility that your caregivers have. And the strength of an organization starts internally. Leaders must first understand the needs of their clinicians and staff – what they're thinking, what they're saying...and what they're not saying.

SHOWCASE THE FULL SCOPE OF YOUR WORK

Too often, employees themselves aren't familiar with everything an organization is doing beyond its four walls. Those community impact programs often go straight back to the mission. But your people can't help spread the word if they don't know. Find out where those gaps are and then undertake internal comms to close them.

REINFORCE YOUR MISSION AND PURPOSE

Don't communicate in terms of financial performance. It's off-putting to staff who want to hear about the impact they have on human lives. Despite all the real financial challenges facing providers today, the messages that will resonate with clinicians and staff (and the public) are around the mission of care and how the organization is meeting needs. Importantly, this is an opportunity to carefully show how administrators care about the mission. Working collaboratively and engaging internal stakeholders leads to better solutions and a more unified public front.

The work ahead: More tactical considerations

RECONNECT WITH THE WHY

Your people have a deep sense of mission. Focus on that and use it to drive unity, especially as differences in opinion and concerns about the big picture are rampant. Encourage – and be a visible part of fighting for patients and each other. Unify your team around a message of hope.

SEPARATE CHAOS AND CONTROL

Talk often and honestly about what the organization – and the people in it – can control. Address the chaos taking place in healthcare nationally and then focus on what can be done today in pursuit of the mission, both individually and collectively as an organization. Give people specifics to think about and act on.

ENCOURAGE IMPACT

The healthcare workforce is ready and able to make a difference. Encourage people to do so. Equip them to speak out about important health issues on social media. Bring them into conversations about what the organization is doing and saying. Give people an opportunity to provide feedback, whether it's on ways to improve infection rates or what's being said in the community about the organization. Then, determine ways to respond.

IDENTIFY WEAK POINTS

Across the board, those who are less satisfied in their job express lower confidence and trust in their leaders. While this group is relatively small – about one in seven – it has the potential to slow any efforts at positive change. Work to find these individuals and open the floor to hear their feedback, using that as a starting point to address concerns and rebuild trust.

ADDRESS COMMODITIZATION

Acknowledge where trends are not heading in the right direction. Perhaps nowhere is this more evident than in the way the public increasingly treats healthcare – and healthcare workers – as a commodity. Don't shy away from this difficult truth, but address it head on. Acknowledge the societal shift of healthcare workers going from heroes to custodians of care. Hold conversations about the moral injury many may be experiencing because of being misbelieved...and mistreated. Again, give them a voice in how to connect with the public and try to restore trust.

Demographics

Organization

Not-for profit hospital/health system	19%
Other Hospital (VA, public/community, etc.)	16%
Primary care practice	15%
Health services company	11%
Nursing home/skilled nursing facility	9%
Other specialty practice (cardiology, oncology, imaging, etc.)	7%
Academic medical center	7%
Investor-owned/for profit hospital/health system	7%
Surgery center	4%
Ambulatory clinic	2%
Travel/Locum tenens company	1%
Other	2%

Time in healthcare

< 2 years	3%
2-5 years	16%
6-10 years	22%
11-15 years	20%
16-20 years	14%
20+ years	24%

Political affiliation

Democrat	39%
Republican	40%
Independent	21%

Gender	Nurses	Physicians	Other clinical
Female	81%	50%	76%
Male	19%	50%	24%

Role

RN	55%
Physician (DO/MD)	35%
Other patient care role (LPN, CNA, respiratory therapist, lab tech, etc.)	7%
APP (NP, PA, CRNA)	3%
Other	1%

Driving Strategy Through Real-World Data Insights

Opportunity and strength comes from knowing how your stakeholders think and feel.

The Jarrard Market Research & Insights (MRI) group specializes in understanding the interplay of stakeholder perceptions, motivations and behaviors – the literal and people politics that permeate healthcare – and the actions and messaging that will drive impact. We explore *the right questions* and develop solutions to deliver critical wins with measurable results. Our tailored strategies enables you to move swiftly with precision, delivering compelling messages through appropriate messengers and building trust.

Interested in learning more?
Get in touch at jarrardinc.com/mri

ABOUT OUR RESEARCH TEAM



Isaac Squyres, Partner

Understanding the power of data to drive the sharpest strategies, Isaac Squyres has incorporated his three decades of strategic communications and public affairs experience to establish Jarrard Market Research & Insights. Squyres brings clients a deep understanding of and skill in navigating the politics of people, elected officials and regulatory matters.



Jed Lam, Senior Vice President

With 25 years of experience, Lam has led global Fortune 100 clients and cross-functional teams in custom primary and secondary research for brand strategy and marketing communication needs.



David Shifrin, PhD, Associate Vice President

With more than 15 years of experience in research, writing and content development, Shifrin manages Jarrard's owned research and coordinates research on behalf of the firm's clients. He is deeply involved in firm thought leadership, tracking issues shaping the industry today.



Natalie Brereton, Senior Managing Advisor

Offering a rich background in public health and data analytics, Brereton brings clients expertise in translating complex research into actionable strategies that shape healthcare decision-making. Among other duties, she helps the team with study design, data analysis and interpretation.