EMEA-LATAM Economic Insights

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SUMMARY

Hiring across EMEA and LATAM continued to decline year-over-year (down -15.3% YoY on average; -13.2% YoY in Europe), but the pace of decline eased from July (-20.2%) and hiring rose +4.6% MoM on average. Entry-level hiring across markets broadly tracked overall hiring, down -17.3% YoY on average (-14.7% YoY in Europe). Employers and candidates remain cautious, as both postings per applicant (-14.6% YoY on average) and applications per applicant (-16.1%) declined further in August. At the industry level, Government Administration (+5.6% YoY) and Hospitals & Health Care (+1.5%) were among few sectors with rising job postings per applicant, while consumer-facing sectors like Accommodation & Food Services (-21.9%) and Real Estate (-19.0%) saw the steepest declines; on the seeker side, applications per applicant fell most in Professional Services (-18.7%) and Administrative & Support Services (-17.2%).

HIRING IN EMEA AND LATAM IN AUGUST CONTINUED TO FALL YEAR-OVER-YEAR (-15.3% ON AVERAGE), BUT MOST MARKETS RECORDED MONTH-OVER-MONTH GAINS.

- Year-over-year hiring across EMEA-LATAM fell by -15.3% on average in August, a smaller drop than in July (-20.2%), but continued well below pre-pandemic levels (-27.2% Yo7Y on average compared with August 2019).
- Ireland (-9.7% YoY) had the smallest decline, followed by Spain (-11.9%), Germany (-12.2%), and the UK (-12.5%). The largest declines were in the UAE (-23.2%), Mexico (-22.3%), and Brazil (-17.6%). The UAE remains the only market above pre-pandemic levels (+3.7% Yo7Y compared with August 2019).
- Hiring rose month-over-month in 10 of 12 markets (+4.6% MoM on average), hinting at some stabilisation. The strongest gains were in Spain (+16.6% MoM), Italy (+9.1%), and Brazil (+8.6%).
- Industry declines remain widespread but less severe than in July. Construction (-6.8% YoY on average) and Technology, Information and Media (-10.0%) held up best, while Utilities (-18.3%) and Entertainment Providers (-16.6%) saw the steepest declines. Pockets of growth emerged in Construction in Ireland (+7.6% YoY), Mexico (+7.5%), and Germany (+0.4%).
- Entry-level hiring contracted marginally more than overall hiring in August across EMEA and LATAM; Ireland was the lone exception (entry -9.5% YoY vs. overall -9.7% YoY). The gap was widest in Mexico (entry -26.5% vs. overall -22.3%) and the UAE (entry -27.3% vs. overall -23.2%).

BOTH EMPLOYERS AND JOB SEEKERS REMAIN CAUTIOUS, AS POSTINGS AND APPLICATIONS PER APPLICANT CONTINUE TO DECLINE ACROSS COUNTRIES AND MOST INDUSTRIES.

- Job postings per applicant fell in every country analysed, down -14.6% YoY on average. The steepest decline was in the UAE (-27.4%), followed by Germany (-19.8%) and France (-19.3%); Italy was the most resilient (-7.4%).
- Applications per applicant fell further, down -16.1% YoY on average, pointing to cooling job search intensity across the region. The UAE again saw the largest drop (-24.8%), followed by Brazil (-19.2%) and Germany (-18.5%).
- Two sectors bucked the regional decline in job postings per applicant: Government Administration (+5.6% YoY) and Hospitals & Health Care (+1.5%). In contrast, consumer-facing and cyclical sectors were hit hardest: Accommodation & Food Services (-21.9%) and Real Estate & Equipment Rental (-19.0%) posted the steepest drops, followed by Retail (-10.8%) and Financial Services (-10.2%).

- On the job-seeker side, Professional Services (-18.7% YoY), Administrative & Support Services (-17.2%), and Financial Services (-11.9%) saw the largest declines in applications per applicant, signalling cooling search intensity even in traditionally competitive white-collar fields.

HYBRID POSTINGS CONTINUED TO DECLINE ACROSS EMEA, WHILE REMOTE POSTINGS GREW.

- Hybrid work remained the dominant flexible work offered, accounting for 24.9% of job postings on average across EMEA, but fell by -12.1% YoY, led by declines in Sweden (-24.4% YoY), Israel (-16.4%), and Italy (-15.4%).
- Interest in hybrid work eased more modestly, with hybrid application shares down -6.0% YoY on average, and rising slightly in Ireland (+1.7%) and Italy (+0.2%). Hybrid roles continued to attract a larger share of applications (30.2% on average across EMEA) than postings (24.9%).
- Remote postings increased by +27.0% YoY on average. The UAE leads, where the remote share more than doubled (+106.8% YoY) to 9.9% of postings, followed by Israel (+48.5%) and Italy (+23.5%). Remote jobs still represent a small fraction of available roles, just 6.8% of all postings across EMEA.
- Candidate interest in remote work softened further, with the share of applications to remote roles down -28.5% YoY on average. Even so, remote roles continued to attract a disproportionate share of applications (10.0% of applications vs. 6.8% of postings), although this gap has narrowed.

AN INSIDE CONNECTION RAISES THE ODDS OF BEING HIRED BY 4-7X ACROSS EMEA-LATAM, BUT THE CANDIDATES WHO WOULD GAIN MOST FROM ONE ARE LEAST LIKELY TO HAVE IT, NEW RESEARCH SHOWS.

- Networks are diverging across EMEA and LATAM. Germany's network formation rate (NFR) sat 28% above its Q1 2020 baseline in Q2 2026 and the UK 3% above, while Brazil (-19%), Italy (-11%) and Sweden (-5%) fell below. India led globally (+99%); the US was 3% below.
- Connected applications convert far better, with wide market variation in EMEA and LATAM. 14-21% of applications carried an inside connection, converting to hires at 7.2x the unconnected rate in Brazil, 5.0x in the UK, 4.8x in Spain, 4.4x in Sweden, 4.3x in Italy, 4.1x in Germany, 3.9x in the Netherlands and 3.8x in France.
- The lift is largest where access is smallest. Applicants in the smallest network quartile saw lifts of 11.8x in Brazil, 10.8x in the UK and 9.5x in Germany and Italy, versus 4-7x for the largest quartile. The access gap is widest in Brazil (+30.7pp), narrowest in Germany (+17.9pp).
- Early career members network more but apply with fewer connections. Gen Z's NFR rose 24% since Q1 2020 as Boomers' fell 43%. Entry-level applicants had a connection on 15.2% of applications vs 22.8% for managers, yet a higher lift (5.5x vs 4.6x); Gen Z's 5.7x was the highest of any generation.
- The gender gap is about access, not value. Men formed 38% more connections per month than women in Q2 2026 (up from 30% in Q1 2020) and led on connected-application share in every market, widest in Italy (+3.8pp) and the Netherlands (+3.7pp), narrowest in Sweden (+1.3pp). Once a connection exists, the lift is near-identical (5.1x vs 5.0x).
- Read more in our research notes on Professional Network Growth and Demographics and The Network Advantage.

METHODOLOGY

- The LinkedIn Hiring Rate (LHR) is a measure of hires divided by LinkedIn membership in the country. This is based on members' profile updates using the start date of a new job. The hiring rate has been seasonally adjusted, as detailed in the LinkedIn Hiring Rate methodology. This number is indexed to the average month in 2016; for example, an index of 1.05 indicates a hiring rate that is 5% higher than the average month in 2016.
- Labour market tightness is calculated from the ratio of active job listings (open listings) that attract applicants (has at least one application) to the number of job seekers who applied to such listings.

- Job search intensity is the average number of job applications per applicant, measuring the intensity of each applicant's job search where job applicants and job postings share the same country. The higher the number, the more intense the job seeking behaviour of the applicant.
- A "remote job" refers to jobs that can be done completely out of the office and is defined as either the job poster explicitly labelled it as "remote" or if the job contained keywords like "work from home" in the listing. A "hybrid job" refers to jobs that are done both in the office and out of the office and is defined as being explicitly labelled as "hybrid" by job poster. The share of hybrid and remote jobs is calculated in proportion to all paid job postings.

APPENDIX

Table 1. % change in hiring

August 2026 (seasonally adjusted)

	Aug 2026	YoY % change
Ireland	0.82	-9.7
Spain	0.85	-11.9
Germany	0.91	-12.2
United Kingdom	0.80	-12.5
Netherlands	0.64	-12.6
Italy	0.79	-14.3
Israel	1.02	-15.2
France	0.80	-15.2
Sweden	0.64	-16.9
Brazil	1.44	-17.6
Mexico	0.76	-22.3
United Arab Emirates	1.07	-23.2

Table 2. % change in hiring by seniority

August 2026 (seasonally adjusted)

	Entry YoY % change	Overall YoY % change
Ireland	-9.5	-9.7
Spain	-12.7	-11.9
United Kingdom	-14	-12.5
Germany	-14.4	-12.2
Italy	-15.1	-14.3
Netherlands	-15.3	-12.6
France	-17.3	-15.2
Israel	-17.3	-15.2
Brazil	-19.2	-17.6
Sweden	-19.4	-16.9
Mexico	-26.5	-22.3
United Arab Emirates	-27.3	-23.2

Table 3. % change in hiring by industry

August 2026 (seasonally adjusted), EMEA-LATAM Average

	YoY % change
Oil, Gas, and Mining	-3.1
Construction	-6.8
Technology, Information and Media	-10.0
Administrative and Support Services	-11.2
Consumer Services	-11.3
Education	-13.1
Accommodation and Food Services	-13.2
Manufacturing	-13.4
Transportation, Logistics, Supply Chain and Storage	-14.6
Retail	-14.7
Professional Services	-14.7
Hospitals and Health Care	-15.1
Government Administration	-15.2
Real Estate and Equipment Rental Services	-15.7
Wholesale	-16.1
Financial Services	-16.4
Entertainment Providers	-16.6
Utilities	-18.3

Table 4. Labour market tightness and job search intensity by industry

August 2026, EMEA-LATAM Average

	Job Postings per Applicant YoY % change	Applications per Applicant YoY % change
Government Administration	+5.6	-0.5
Hospitals and Health Care	+1.5	+0.4
Entertainment Providers	-2.4	-7.9
Construction	-3.0	-9.6
Technology, Information and Media	-4.0	-9.2
Oil, Gas, and Mining	-4.2	-3.5
Administrative and Support Services	-5.7	-17.2
Education	-6.0	-6.9
Utilities	-6.2	-1.4
Manufacturing	-6.6	-7.9
Professional Services	-7.0	-18.7
Wholesale	-7.7	-3.0
Consumer Services	-8.4	-4.0
Transportation, Logistics, Supply Chain and Storage	-9.1	-1.3
Financial Services	-10.2	-11.9
Retail	-10.8	-9.2
Real Estate and Equipment Rental Services	-19.0	-6.3
Accommodation and Food Services	-21.9	-5.2

Table 5. Labour market tightness and job search intensity

August 2026

	Job Postings per Applicant YoY % change	Applications per Applicant YoY % change
Italy	-7.4	-7.2
United Kingdom	-8.2	-16.3
Brazil	-8.6	-19.2
Mexico	-11.4	-11.1
Ireland	-12.4	-14.5
Netherlands	-17.0	-15.6
France	-19.3	-17.6
Germany	-19.8	-18.5
United Arab Emirates	-27.4	-24.8

Table 6. Share (%) of hybrid job postings

August 2026

	Aug 2026	YoY % change	MoM % change
Israel	32.4	-16.4	-5.5
United Kingdom	32.0	-9.4	-0.5
Ireland	30.9	-11.7	-2.1
Netherlands	26.9	-2.8	+0.3
Germany	24.6	-11.9	+4.7
Sweden	24.3	-24.4	+0.9
France	23.8	-2.3	-1.7
Italy	23.0	-15.4	+1.7
United Arab Emirates	6.6	-15.0	-0.8

Table 7. Share (%) of hybrid job applications

August 2026

	Aug 2026	YoY % change	MoM % change
United Kingdom	39.2	-6.6	+1.3
Israel	38.5	-8.1	-4.5
Ireland	36.9	+1.7	+1.5
Netherlands	35.4	-4.6	+0.3
Germany	30.7	-8.3	+1.1
Italy	28.7	+0.2	+2.6
Sweden	27.9	-11.5	+4.3
France	27.2	-4.1	+0.5
United Arab Emirates	7.2	-12.9	+4.9

Table 8. Share (%) of remote job postings

August 2026

	Aug 2026	YoY % change	MoM % change
Ireland	10.3	+5.0	+12.6
United Arab Emirates	9.9	+106.8	+66.0
United Kingdom	9.9	+15.1	+2.9
Germany	7.4	+14.8	+2.0
Italy	7.0	+23.5	+9.0
Israel	4.7	+48.5	+22.8
Sweden	4.7	+16.8	-6.9
France	3.8	-3.1	+7.7
Netherlands	3.5	+15.7	+8.9

Table 9. Share (%) of remote job applications

August 2026

	Aug 2026	YoY % change	MoM % change
United Kingdom	15.1	-11.3	-6.8
Germany	14.8	-32.3	-11.0
Ireland	13.8	-31.1	-8.9
Italy	10.6	-34.2	-9.6
Netherlands	9.1	-37.0	-10.5
Sweden	7.9	-41.8	-20.5
Israel	6.9	-24.1	-5.1
France	6.5	-29.8	-2.6
United Arab Emirates	5.2	-14.6	-15.0