

Global Talent Barometer

2025 June Report and Key Findings



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Bridging the Divide: From Talent Management to Human Potential

The advance of AI means every company is transforming to survive and thrive. Yet - perhaps contrary to popular belief - **digital transformation is less about technology and more about people.** The ability to adapt to an even more digital future depends on developing the next generation of skills, closing the gap between talent supply and demand, and future-proofing your own and others' potential.

Understanding what people want from work and helping them to develop their skills throughout long working lives has never been more critical. That's why I am so pleased to share our latest Global Talent Barometer, offering workers the opportunity to share how they are feeling about the

world of work today and tomorrow. It also gives employers much-needed insight to understand employee needs and identify best practices that stand out in this competitive global talent market.

Our data continues to confirm that people expect work to offer them more. More balance. More flexibility. More humanity. And importantly – more development.

Yet one in three workers say they don't have enough opportunities to achieve their career goals at their current employer. Regular skill-building opportunities don't just create capability – they signal organizational commitment to people's futures.

As talent shortages continue to grow and technology accelerates, the ability to unleash potential and build talent mobility is key to business growth. **The Global Talent Barometer shows that leading organizations are designing workflows that build resilience rather than deplete it and involving employees as partners rather than shielding them from business realities.** It is now up to us to listen, to partner, and to act, and this data helps us do just that.

Thank you for joining us as we shape the future of work by putting people at the center of everything we do.

Global Talent Barometer Methodology

The ManpowerGroup Global Talent Barometer measures worker well-being, job satisfaction, and confidence around the world. This comprehensive tool leverages independent survey best-practices and statistically significant samples to create a powerful tool to better understand what workers want globally. The research aims to improve the future of work through deeper understanding of the key drivers of workforce sentiment today.



Fieldwork Conducted:

March 14 – April 11, 2025

19 Countries Surveyed:

Australia, Canada, France, Germany, India, Israel, Italy, Japan, Malaysia, Mexico, The Netherlands, Norway, Poland, Singapore, Spain, Sweden, Switzerland, United Kingdom (U.K.), and the United States (U.S.).

Survey Methodology:

Survey responses were collected from 13,771 workers. All the data is weighted to match the worker population in each country by gender, age and region, and all countries are weighted to be equal.

Modified Question Wording:

Edits have been made to question text throughout this report to ensure readability. Complete versions of any shortened statements can be found in the '[About the Survey](#)' section at the end of the report.



Key Findings



Key Findings

Now in its second installment, the **Global Talent Barometer – reflecting worker sentiments across three indices comprised of twelve distinct benchmarks – stands at 68%**. Despite a decline in job satisfaction, the data reveals a notable rise in workers' confidence and overall well-being.

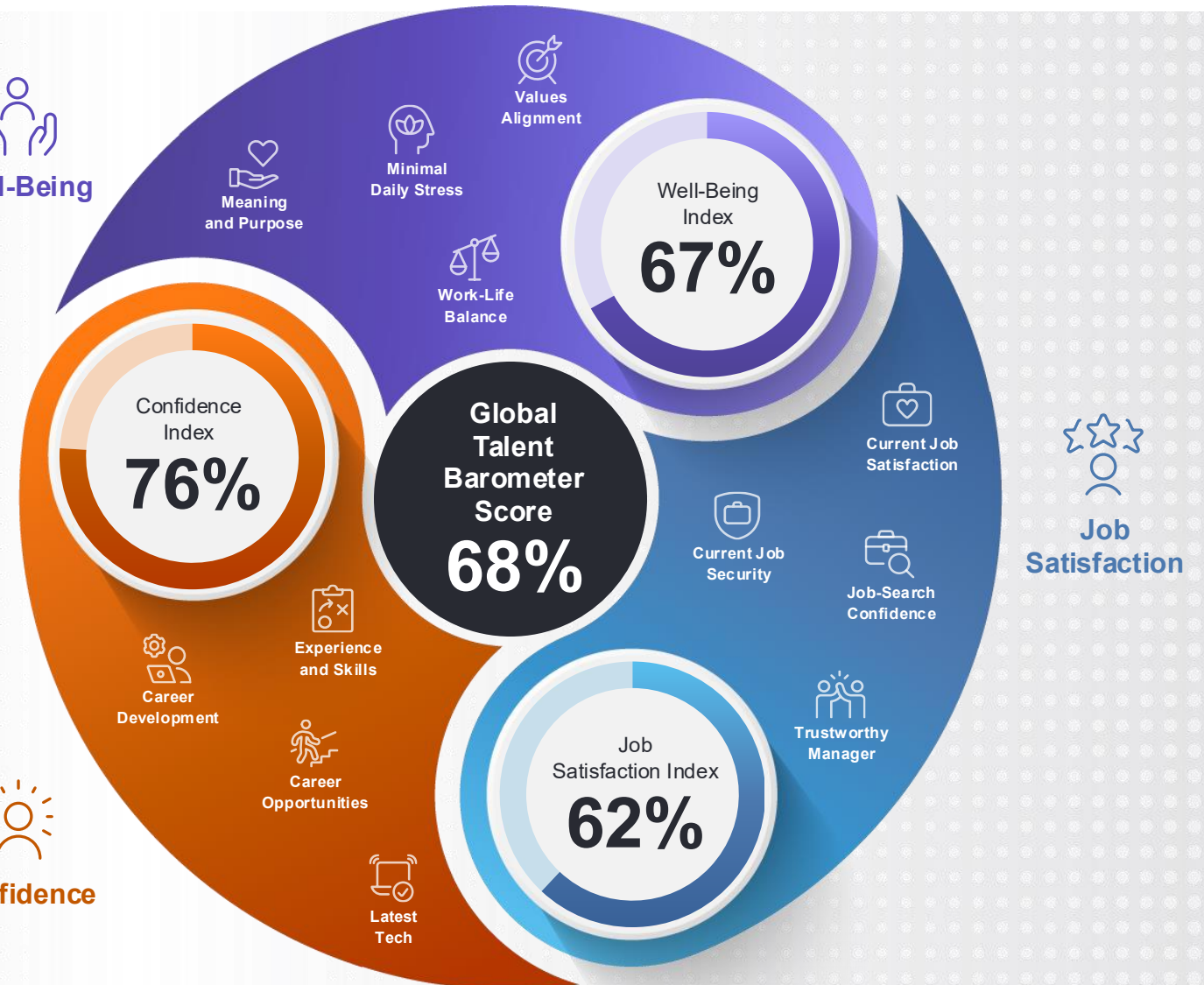
The research reveals what employees need and value most, helping employers understand and act on key drivers to attract and retain top talent in a changing world of work.



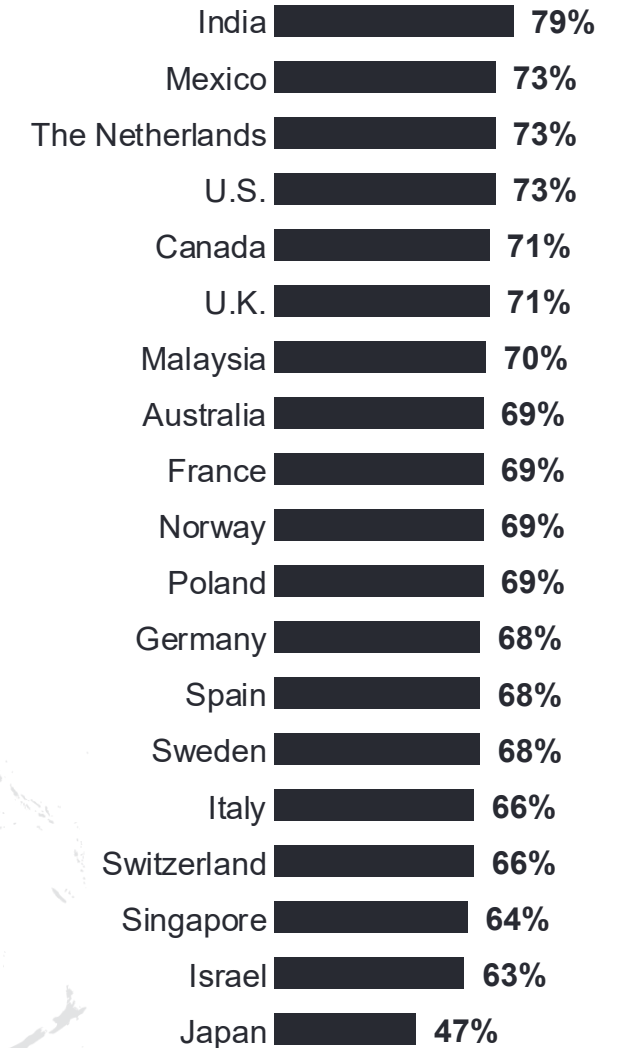
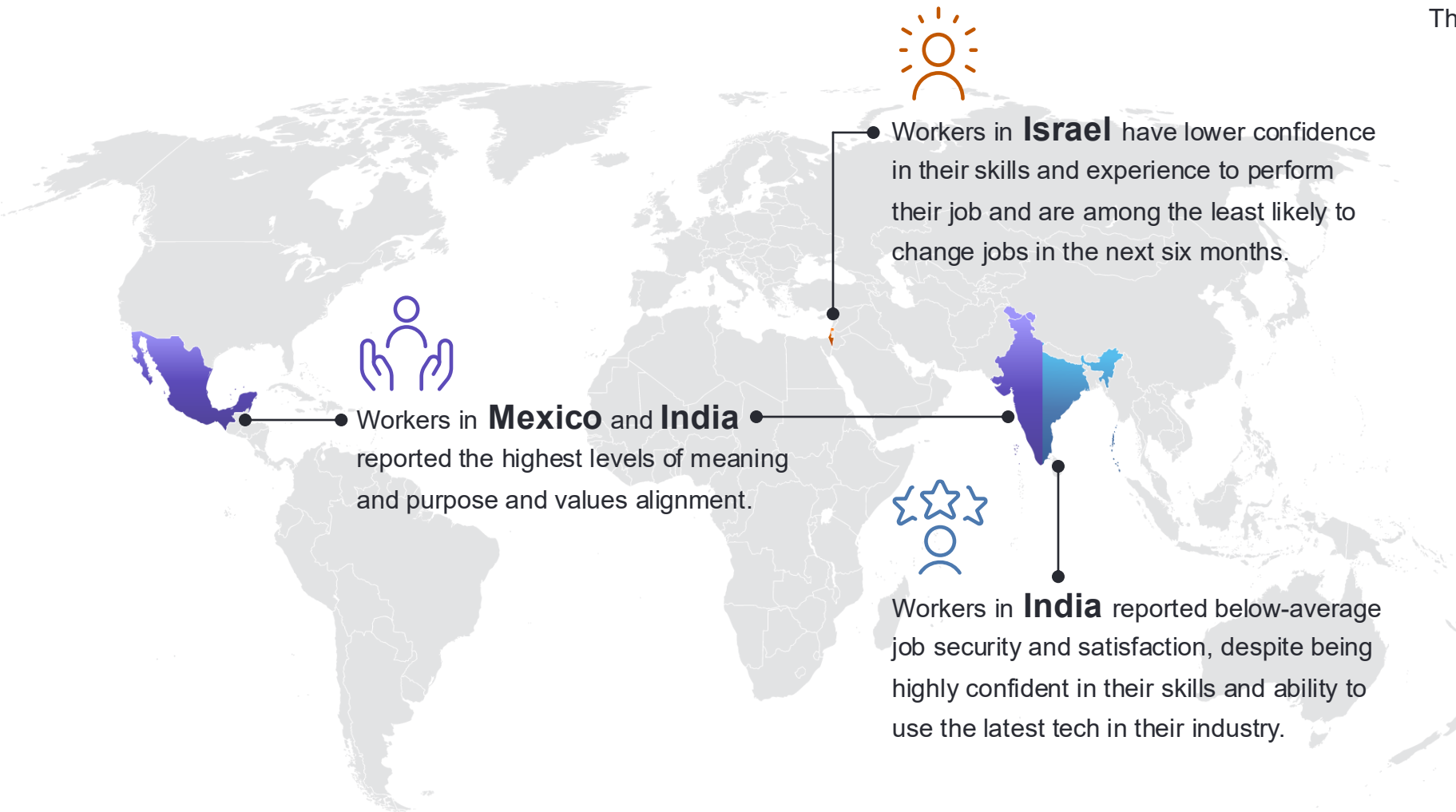
Well-Being



Confidence



Worker Sentiment Around the World



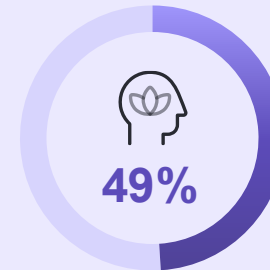
The Stress-Retention Connection

Workplace stress remains high worldwide.

Stress levels are similar between all roles, but **middle managers reported the most stress.**



Despite **more workers finding their work meaningful and purposeful**, nearly half of the workforce continue to experience moderate to high daily stress.



Nearly half (**46%**) are concerned about their workload impacting work-life balance.

Stress is exacerbated among **Gen Z: They continue to experience the highest daily stress levels**, despite feeling increased support.



Gaps in values alignment between essential workers and executive and senior-level management **are considerable.**

Essential Workers

65%

Executive and Senior-Level Management

89%

Stuck in the Middle

Job Satisfaction Decreases for Middle Managers and Women

Millennial job satisfaction has dropped 6% since 2024 - the sharpest drop of any generation.

Millennial Women

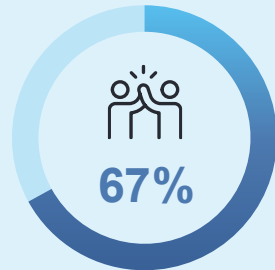
Rank lowest on the Job Satisfaction Index



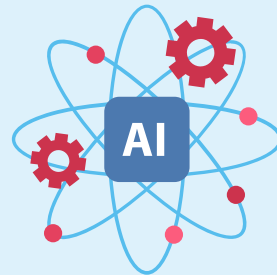
34% of managers are bracing for **possible job loss** in the coming **6 months**.



Even under pressure and uncertainty, **managers continued to build trust**. More workers now **believe their managers have their backs** (+4pp) since 2024.



Most managers (77%) **feel their careers are at risk**, primarily due to economic instability, restructuring, and AI.



Location signals job uncertainty as workers who are onsite without choice feel they are 2x less likely to be forced to leave in six months compared to their fully or mostly remote counterparts.



Onsite Without Choice

22%

Fully or Mostly Remote

44%

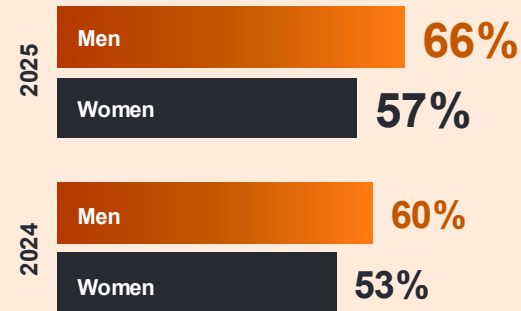
Development as Trust Currency

Employers benefit from **improved career pathing and development**.

Hybrid workers lead in career confidence, topping all four benchmarks.



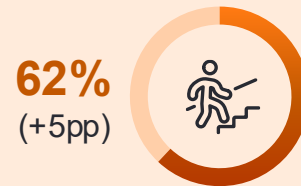
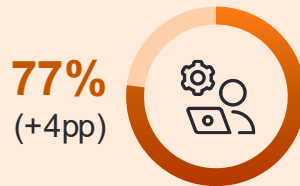
Gender inequality persists in 2025, with **women reporting fewer career moves and promotions**.



Workers in **IT** reported the **strongest career growth and skills confidence**.



Worker confidence rose +2pp since 2024, driven by reported increased **career development** and **career opportunities**.



Backed by **career support** and **undeterred by tech advancements**, workers are feeling sharper as **skills confidence grows (+2pp)**.



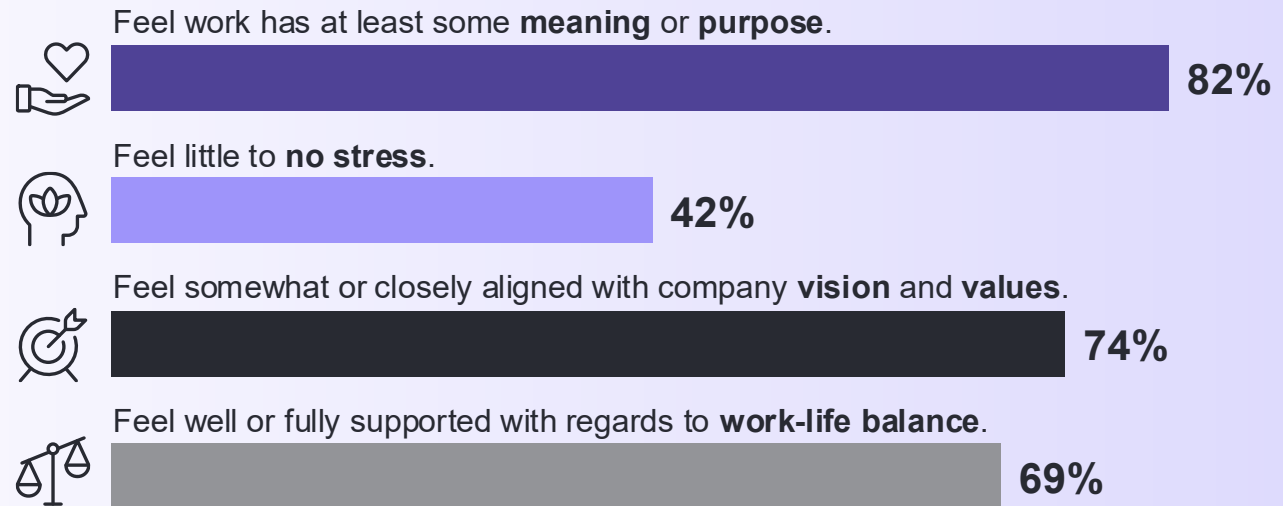
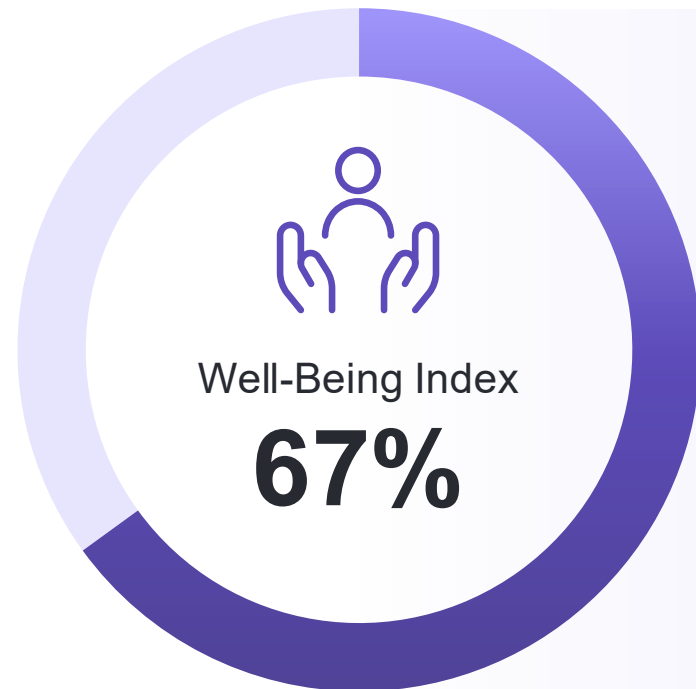


Well-Being



Better Work-Life Balance Boosts Well-Being

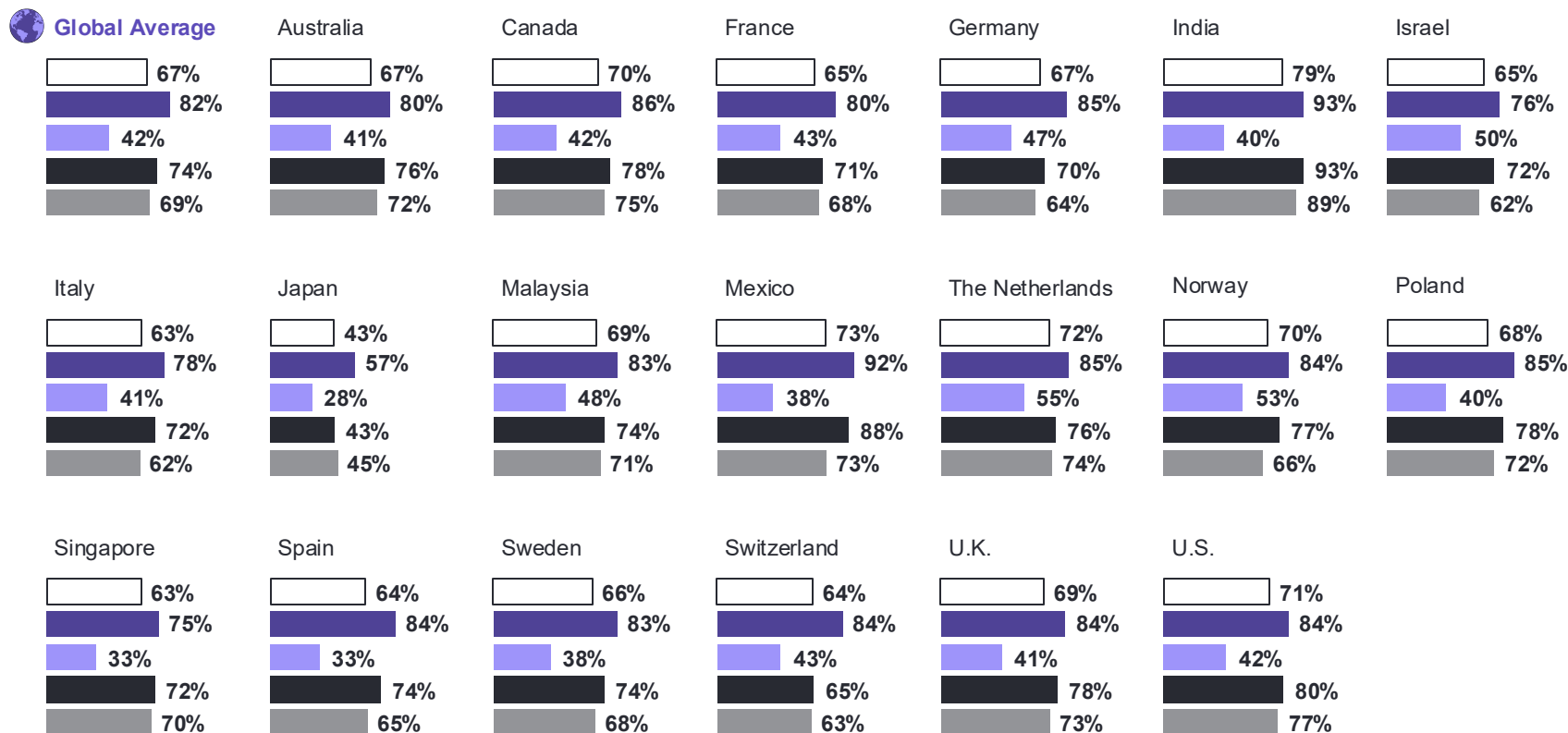
The Well-Being Index is based on four distinct benchmarks: meaning and purpose, minimal daily stress, values alignment, and work-life balance.



The Well-Being Index an average of the above percentages. Learn more about the [Methodology](#).

Country-Level Perspectives

Examine how well-being varies from nation to nation and its driving factors.



Well-Being Index
 Meaning and Purpose
 Minimal Daily Stress
 Values Alignment
 Work-Life Balance



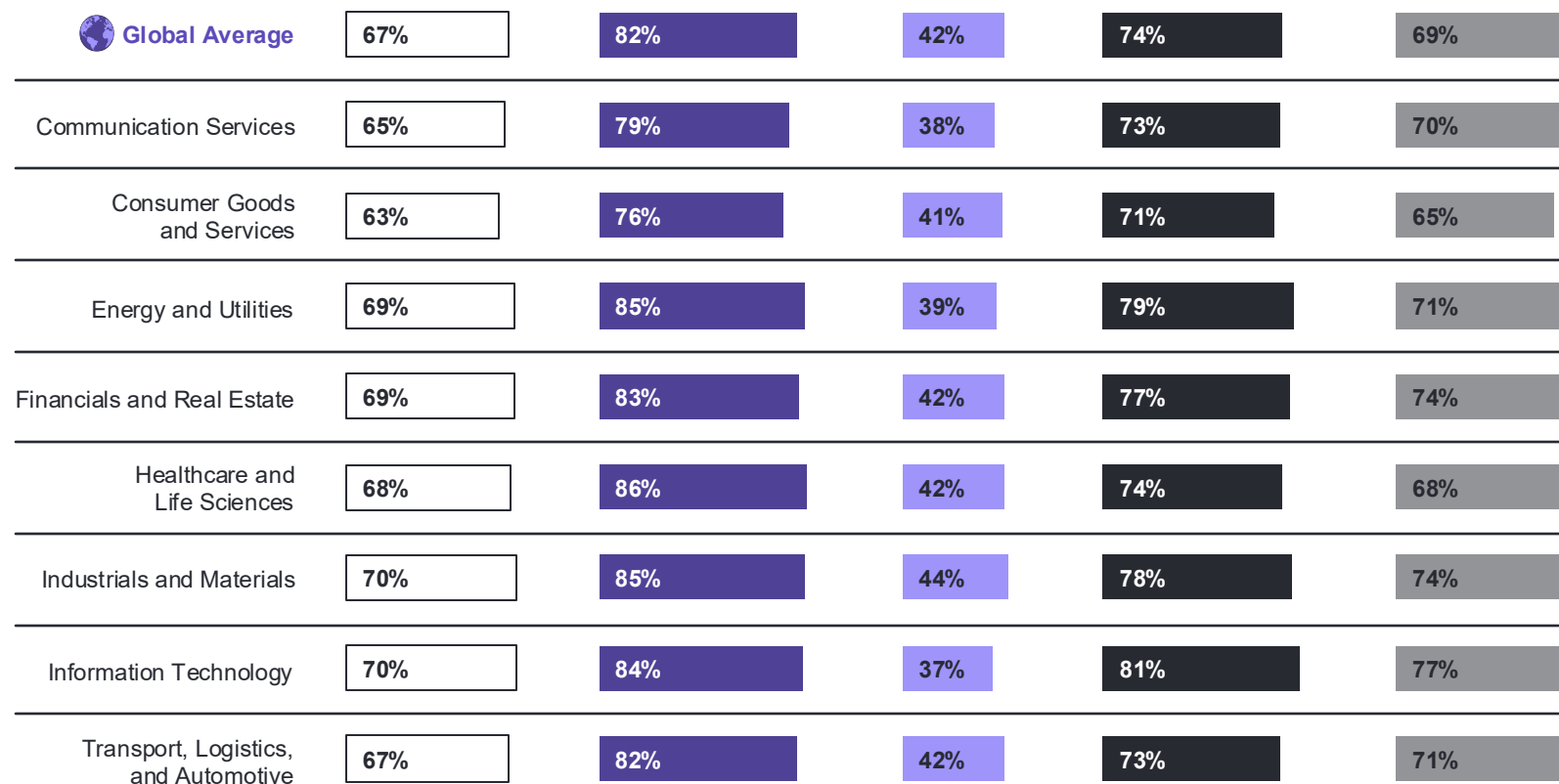
Workers in India reported the highest overall well-being, driven by meaningful work and values alignment.








Japanese workers were the most likely to report high daily stress, followed by Singapore and Spain.

Industry Insights

Explore how well-being differs across key industry verticals.



 Well-Being Index  Meaning and Purpose  Minimal Daily Stress  Values Alignment  Work-Life Balance



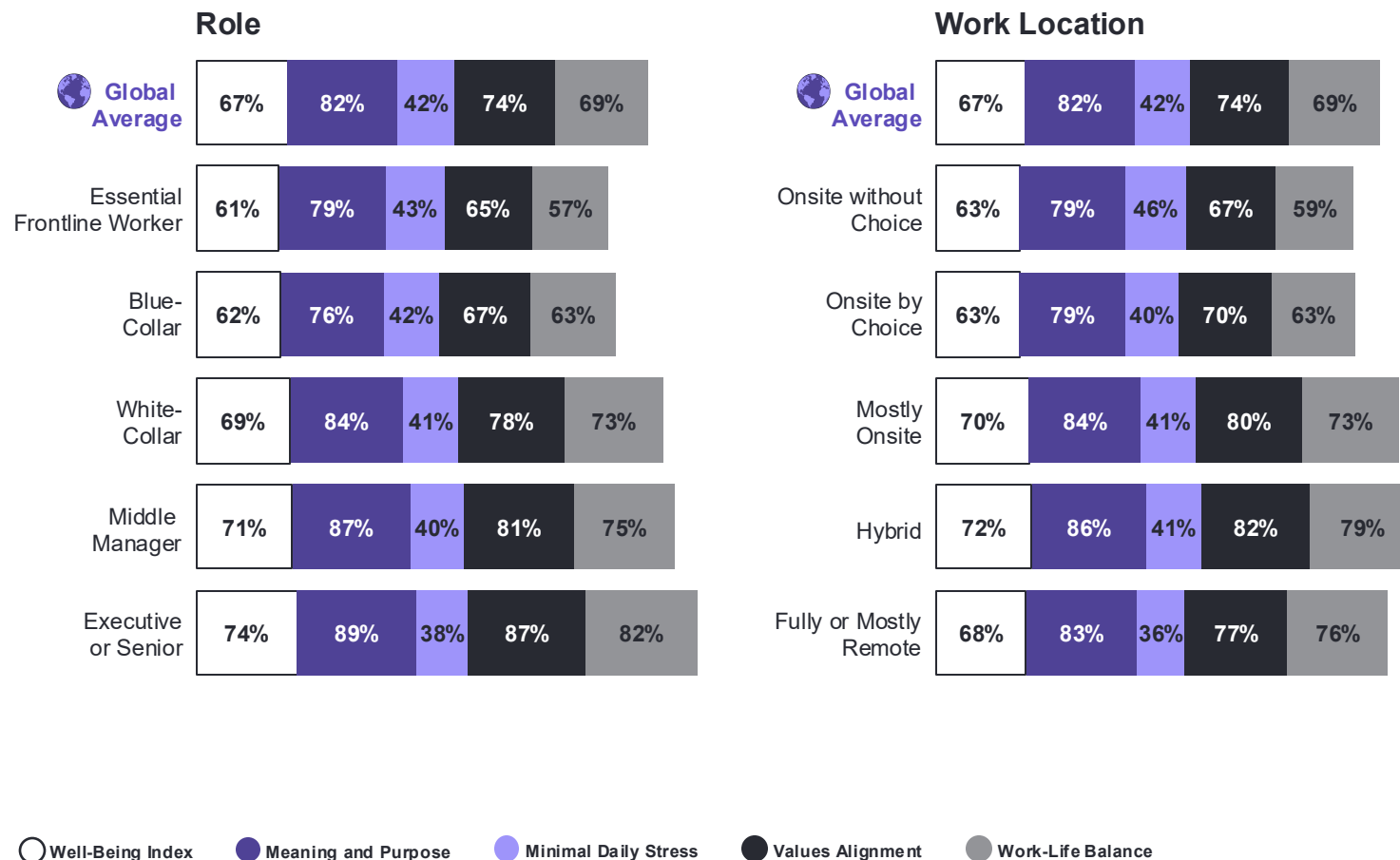
Industrials and Materials and IT workers reported the greatest overall well-being.



IT workers were the most likely to report moderate to high daily levels of workplace stress.

Role and Location Trends

Uncover the connection between job roles, work locations, and overall well-being.



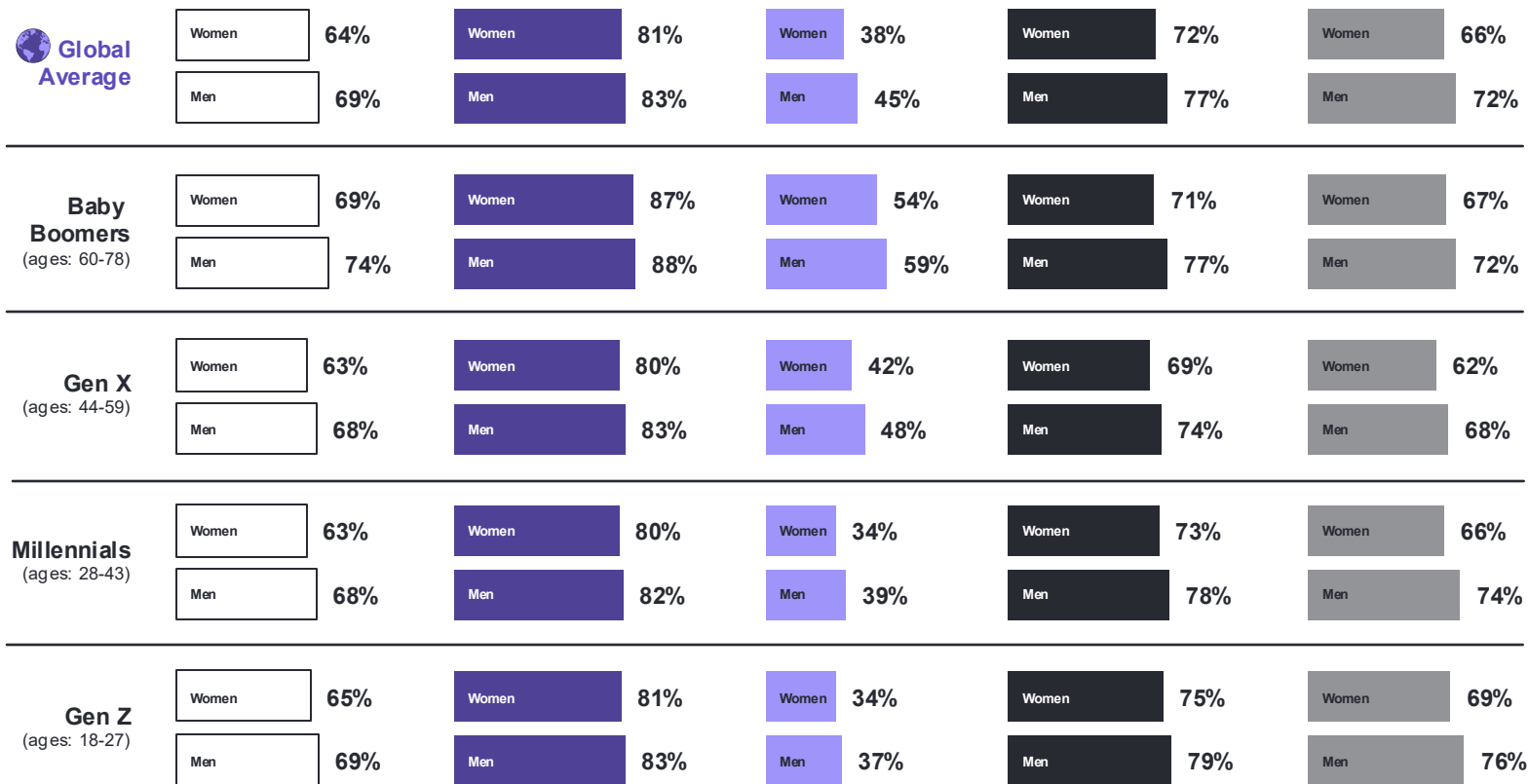
Essential frontline and blue-collar workers reported the lowest overall Well-Being across roles and locations.



The gap in values alignment between essential workers and executive and senior management is considerable.

Age-Gender Dynamics

Examine well-being differences and similarities by age group and gender.



○ Well-Being Index ● Meaning and Purpose ● Minimal Daily Stress ● Values Alignment ● Work-Life Balance



Gen Z succeeds in demanding work-life support, but stress levels remain stubbornly high.



The gender gap in work-life balance is the greatest between millennial men and women.



Job Satisfaction



Less Job Satisfaction and Security, More Trust in Managers

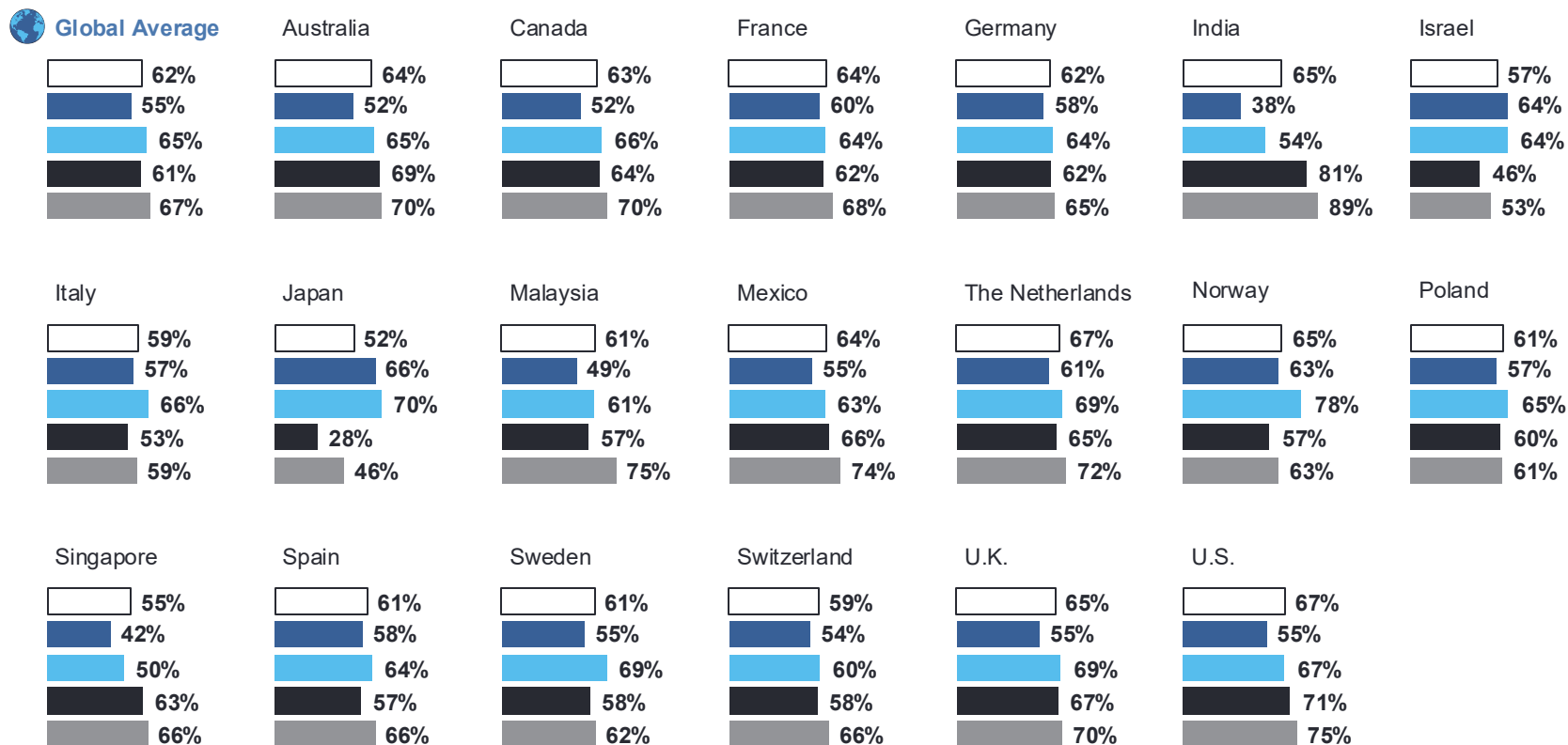
The **Job Satisfaction Index** is based on four distinct benchmarks:
current job satisfaction, job security, job-search confidence, and manager trust.



The Job Satisfaction Index an average of the above percentages. Learn more about the [Methodology](#).

Country-Level Perspectives

Explore how job satisfaction differs across countries.



 Job Satisfaction Index  Current Job Satisfaction  Current Job Security  Job-Search Confidence  Trustworthy Manager



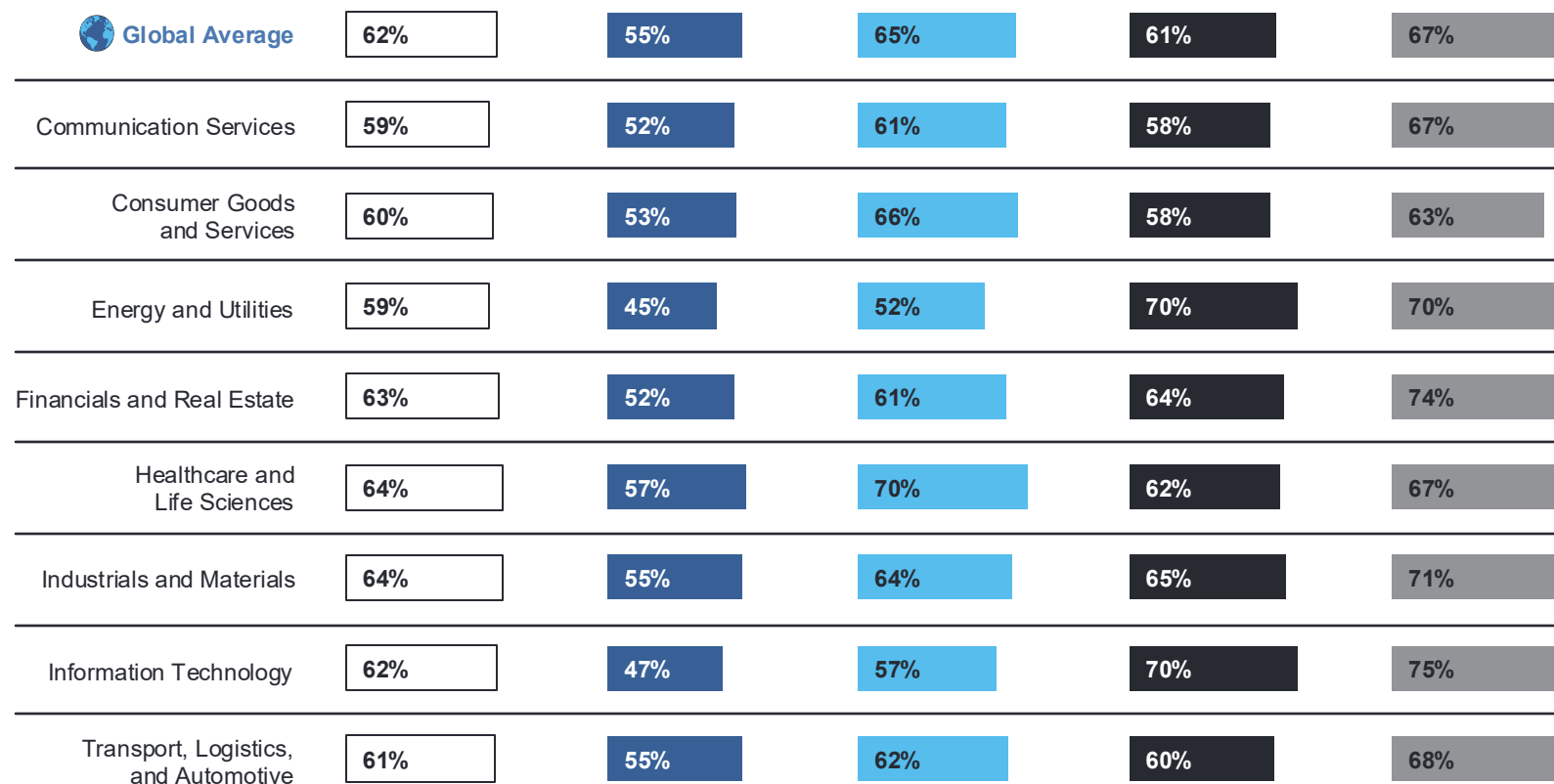
While India topped the charts for most aspects of work, it ranked the lowest for job security and satisfaction, along with Singapore.



Japanese workers thought they were unlikely to be forced out of their job in the next six months, while ranking below average on all other factors.

Industry Insights

Examine sector-specific trends in worker job satisfaction.



○ Job Satisfaction Index ● Current Job Satisfaction ● Current Job Security ● Job-Search Confidence ● Trustworthy Manager



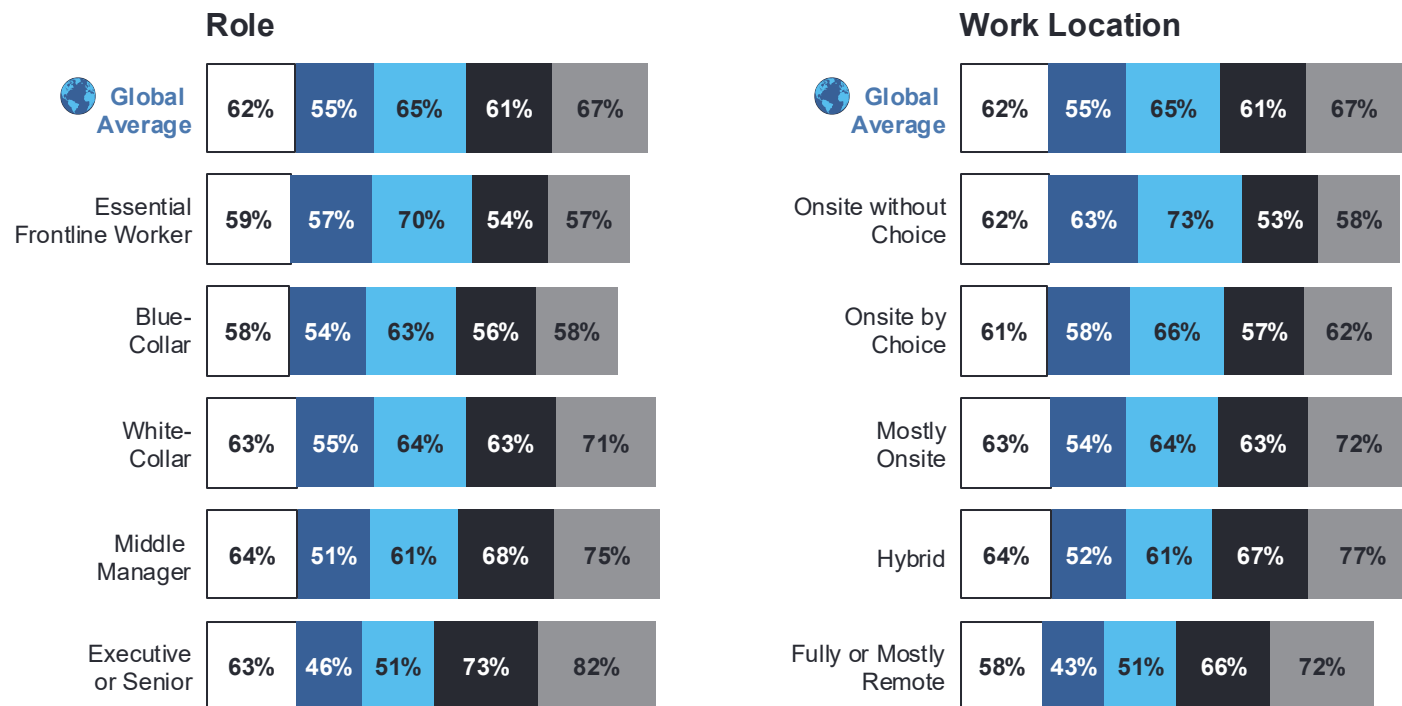
IT and Energy and Utilities workers felt the least secure in their jobs, while reporting the highest job-search confidence.



Managers were reportedly the least trustworthy in Consumer Goods and Services.

Role and Location Trends

Examine how job roles and working locations shape employee satisfaction.



○ Job Satisfaction Index ● Current Job Satisfaction ● Current Job Security ● Job-Search Confidence ● Trustworthy Manager



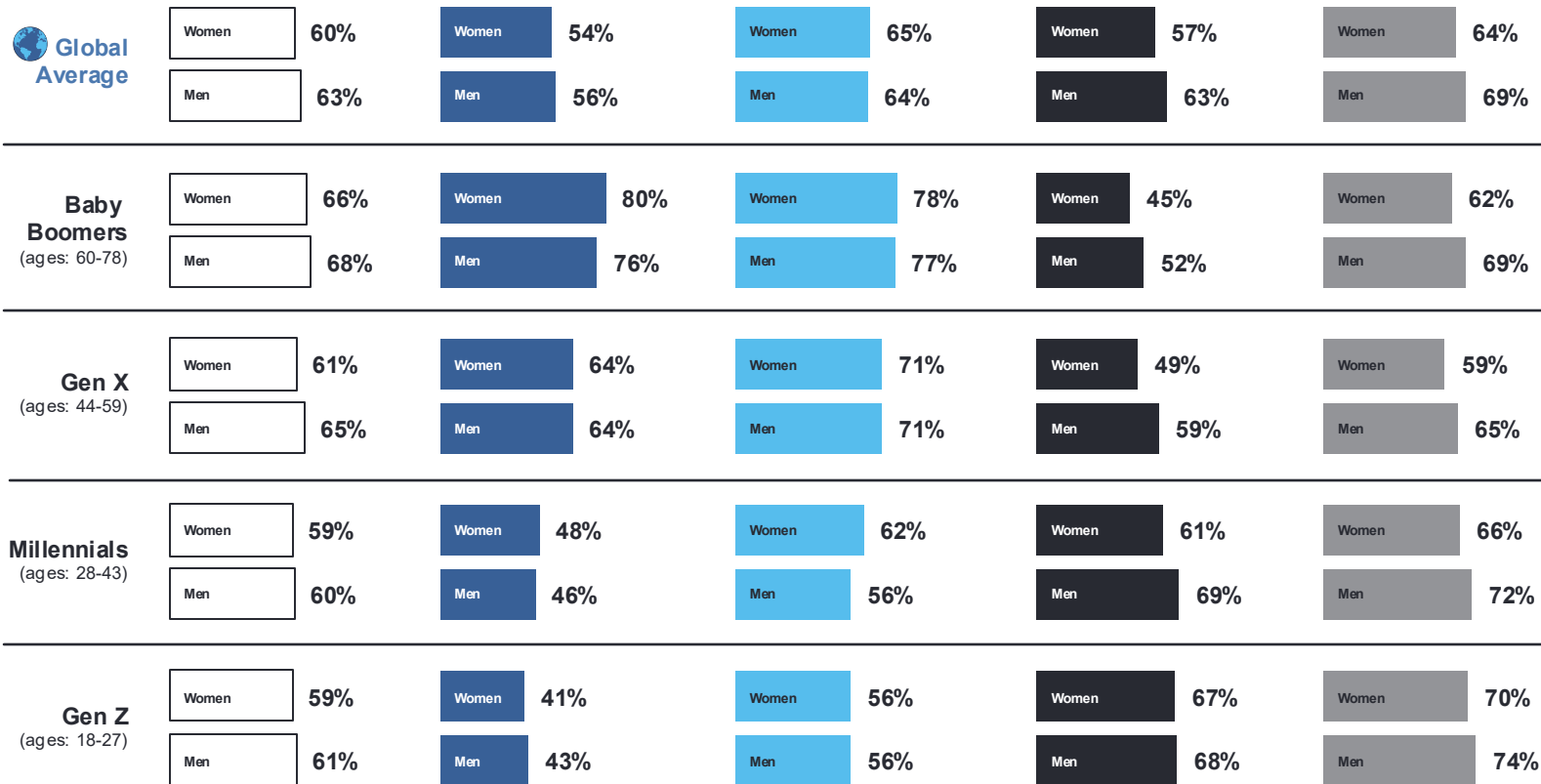
Essential frontline workers felt the most secure in their jobs, while executive or senior-level roles were the least secure.



White-collar workers were most likely to be satisfied with their jobs.

Age-Gender Dynamics

Explore how different age groups and genders experience job satisfaction.



○ Job Satisfaction Index ● Current Job Satisfaction ● Current Job Security ● Job-Search Confidence ● Trustworthy Manager



Gen Z workers were the most likely to say they want to voluntarily leave their current employer, while also feeling the least secure in their jobs.



Millennials reported the steepest drop in job satisfaction, decreasing six percentage points since 2024.



Confidence



Rising Confidence and Career Growth

The Confidence Index is based on four distinct benchmarks:

career development, career opportunities, experience and skills, and tech and tools.



Have opportunities to gain skills and experiences to **achieve their career goals** at the organization.

77%



Have opportunities for **promotion** or **movement** within the organization.

62%



Have moderate to high confidence in their **skills** and **experience** to perform their job.

89%



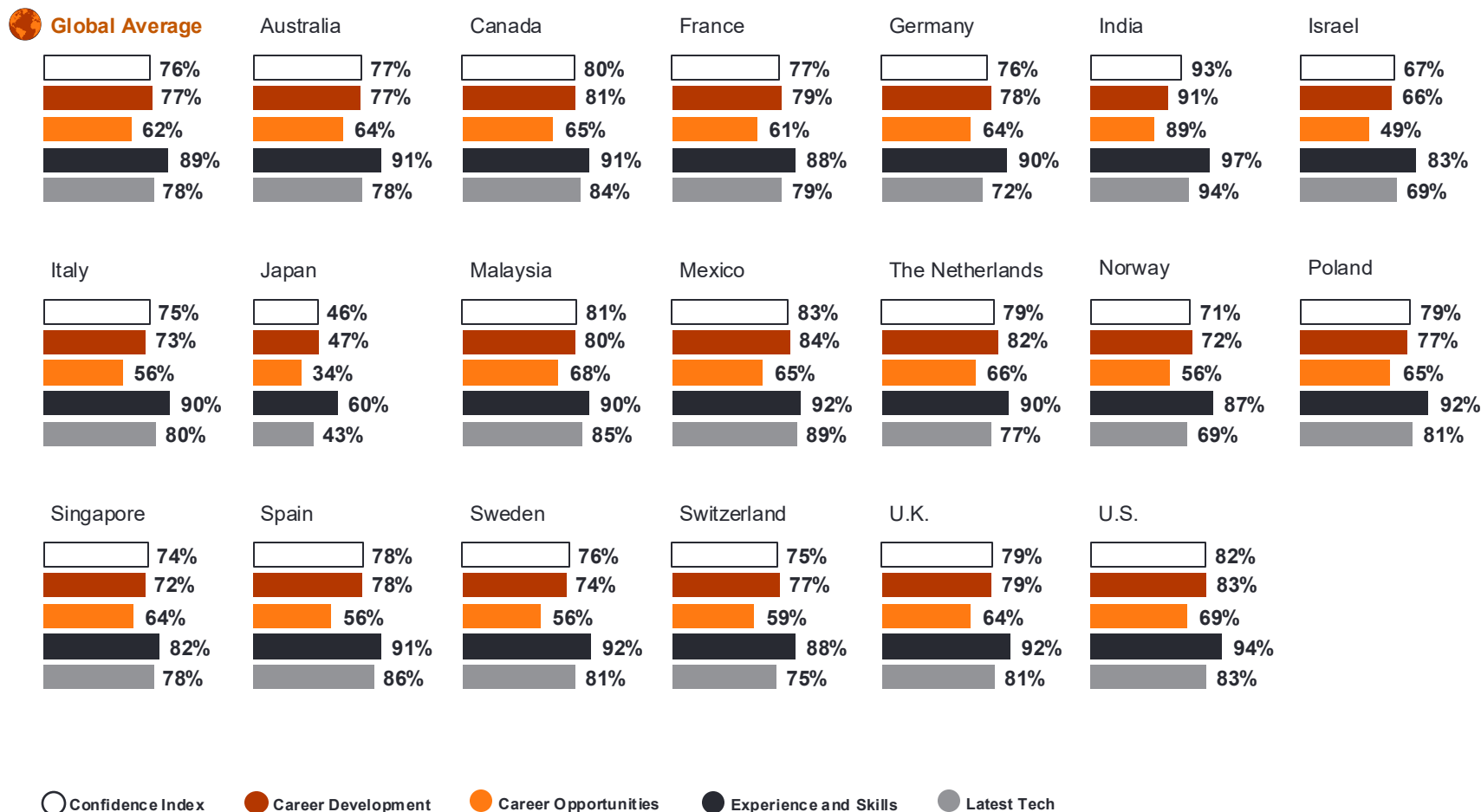
Have confidence in their ability to use the **latest tech** available to their industry.

78%

The Confidence Index is the an average of the above percentages. Learn more about the [Methodology](#).

Country-Level Perspectives

Examine how worker confidence is experienced around the globe.



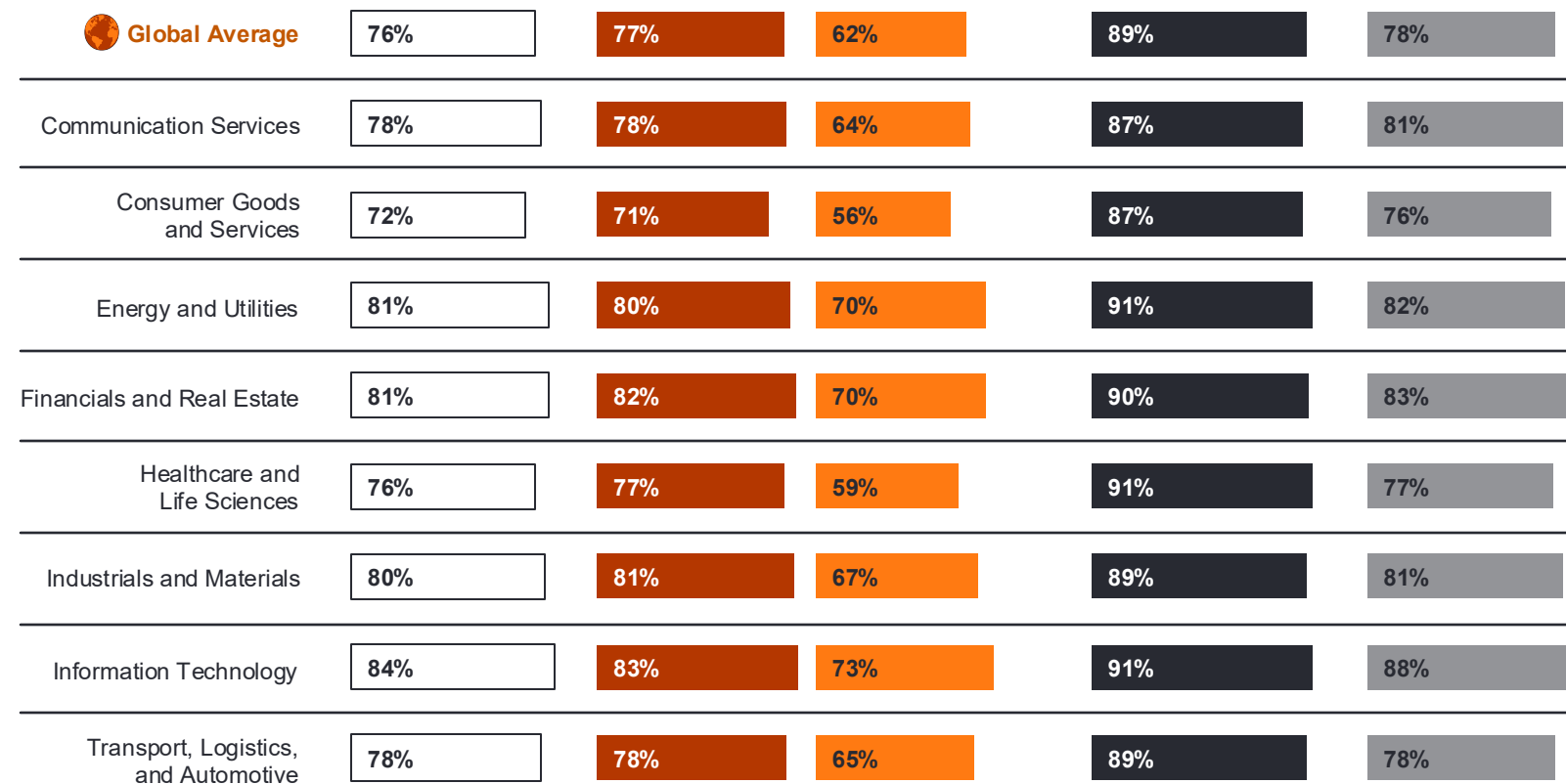
India reported the best overall workforce confidence, with strong worker sentiment the strongest across all four benchmarks.



Germany and Norway reported below-average confidence in using their industry's latest tech and tools.

Industry Insights

Understand how sector-specific factors influence worker confidence.



Confidence Index Career Development Career Opportunities Experience and Skills Latest Tech



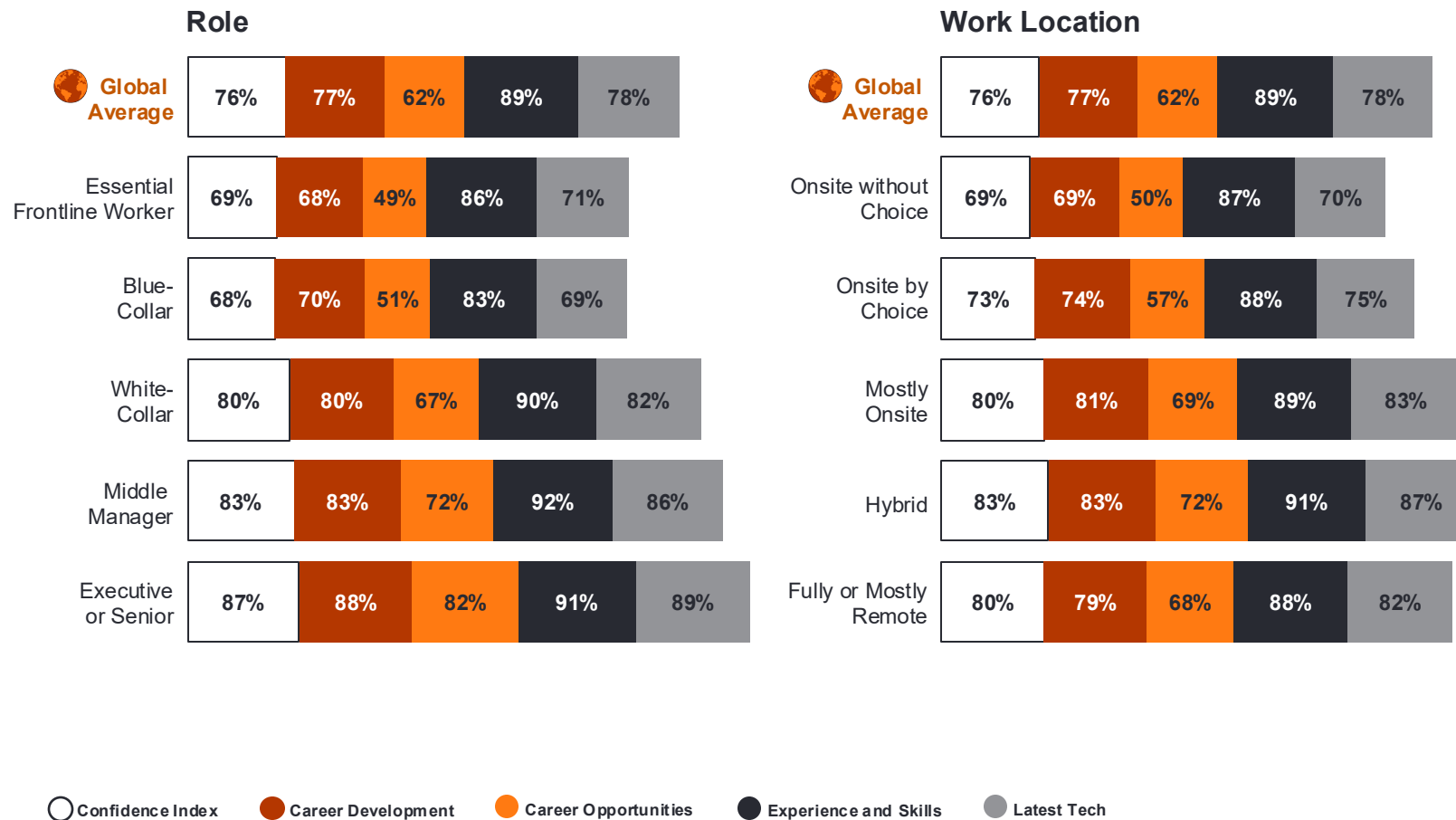
Consumer Goods and Services reported the lowest confidence, especially when it comes to career development and opportunities.



Financials and Real Estate workers reported the best career development opportunities, along with one of the highest levels of skills confidence.

Role and Location Trends

Analyze how different roles and work settings influence employee confidence.



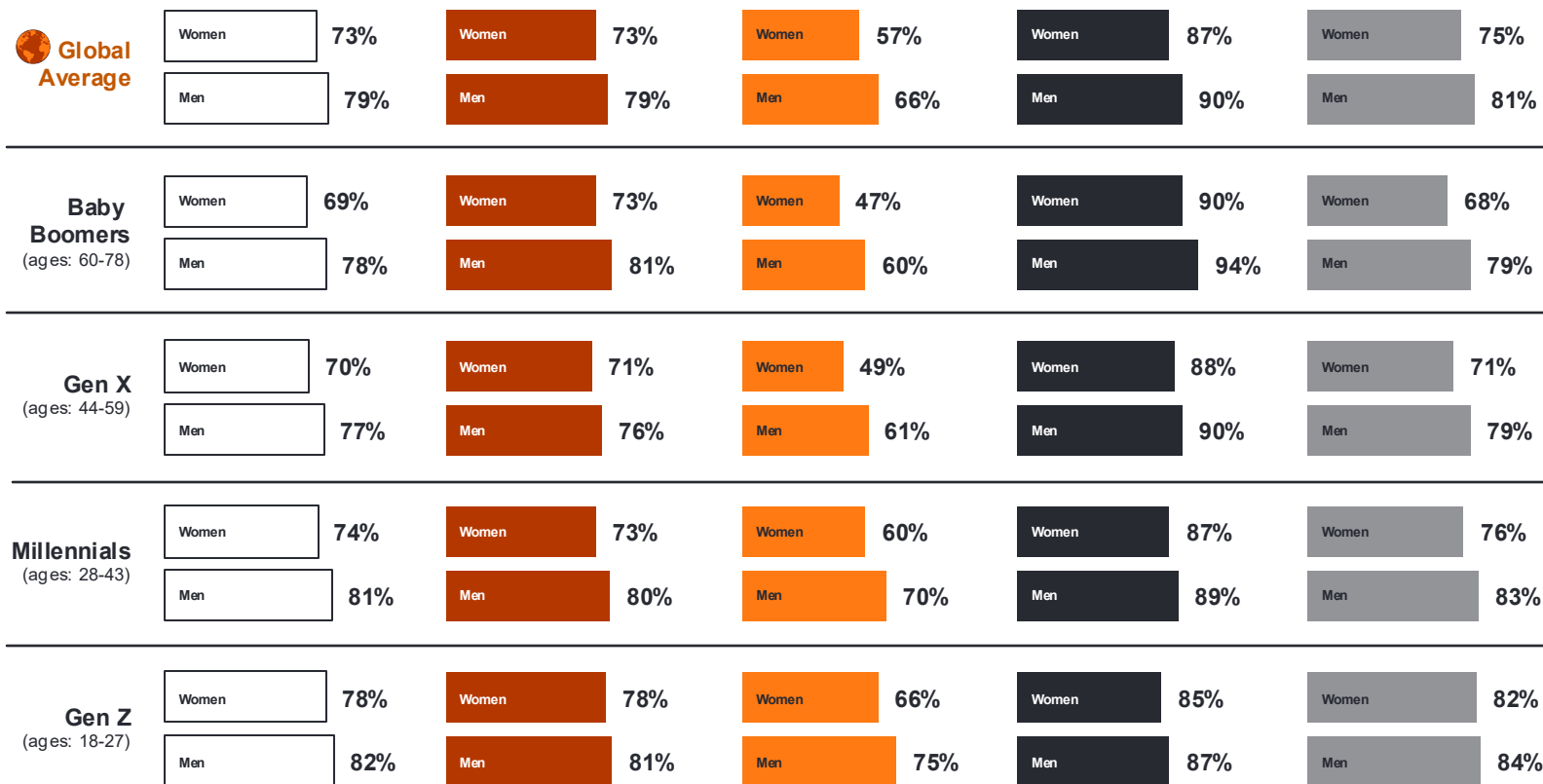
Essential front-line workers and those who are onsite without choice reported the lowest career opportunities.



Hybrid workers expressed the highest confidence in all areas: experience and skills, tech and tools, career development, and opportunities.

Age-Gender Dynamics

Explore how worker confidence varies across different age groups and genders.



Confidence Index Career Development Career Opportunities Experience and Skills Latest Tech



Gender inequalities persist, but Gen Z workers reported the smallest gender differences across all confidence benchmarks.



Gen X and Baby Boomers reported the greatest gender discrepancy in career opportunities.

Conclusion



Opportunities for Employers



Meaningful work can't outrun burnout.



While more workers find purpose in their jobs, persistent daily stress — especially among Gen Z and middle managers — remains high. This will increase costs as it begins to impact productivity and retention.

Conservative global estimates for the cost of poor retention are \$18,591 per employee that leaves the organization. These costs will quickly add up for underperforming organizations as they lose their top performers.

Meeting workers in the middle.



As job security concerns grow and current job satisfaction declines, **mid-career professionals, especially women, represent a critical yet underutilized talent pool**. Employers looking to stabilize their workforce should prioritize this group with clear career paths, recognition, and support.

Recent research estimates organizations that prioritize manager development and engagement are already realizing productivity improvements of up to 28%.

Capitalize on confidence.



Despite growing uncertainty, **workers are now more confident overall compared to 2024**. As organizations look to retain essential talent, it's imperative to focus on key factors within their control that are driving these positive sentiments.

Continue strengthening and fostering trust between managers and employees, promoting work-life balance, and providing transparency regarding opportunities for professional development and advancement within the company.

About the Survey

Forward-Looking Statements:

This report contains forward-looking statements, including statements regarding labor demand in certain regions, countries and industries, economic uncertainty, and the use and impact of AI. Actual events or results may differ materially from those contained in the forward-looking statements, due to risk, uncertainties, and assumptions. These factors include those found in the Company's reports filed with the U.S. Securities and Exchange Commission (SEC), including the information under the heading "Risk Factors" in its Annual Report on Form10-K for the year ended December 31, 2024, whose information is incorporated herein by reference. ManpowerGroup disclaims any obligation to update any forward-looking or other statements in this release, except as required by law.

Survey Methodology:

Survey responses were collected from 13,771 workers across 19 countries from March 14 to April 11, 2025. All the data is weighted to match the worker population in each country by gender, age and region, and all countries are weighted to be equal.



Well-Being

- **Minimal Daily Stress:**
Percentage of workers who rate their stress levels as 'little' to 'no stress' using a 10-point scale.
- **Meaning and Purpose:**
Percentage of workers who rate their work is being either 'somewhat' or 'very meaningful' using a 10-point scale.
- **Values Alignment:**
Percentage of workers who rate their alignment with their employer's values as "somewhat" or "closely aligned" using a 10-point scale.
- **Work-life Balance:**
Percentage of workers who rate their company's support for work-life balance and personal well-being as "well" or "completely supported" using a 10-point scale.
- **Well-Being Index:**
The average of the above percentages.



Job Satisfaction

- **Current Job Satisfaction:**
Percentage of workers who agree they are "very unlikely" or "unlikely" to change jobs on their own initiative, using a 10-point scale.
- **Current Job Security:**
Percentage of workers who agree they are "very unlikely" or "unlikely" to be forced to leave their current job, using a 10-point scale.
- **Job-Search Confidence:**
Percentage of workers who agree they're "very confident" or "confident" they could find another job that meets their needs, using a 10-point scale.
- **Trustworthy Manager:**
Percentage of workers who agree they "trust very much" or "somewhat trust" that their manager has their best interests at heart concerning their career development, based on a 10-point scale.
- **Job Satisfaction Index:**
The average of the above percentages.



Confidence

- **Experience and Skills:**
Percentage of workers who agree they are "very confident" or "confident" they have the skills and experience to perform their current job, using a 10-point scale.
- **Career Development:**
Percentage of workers who agree they "very much so" or "do" have enough opportunities to gain the skills and experience they need to achieve their career goals at their current organization, using a 10-point scale.
- **Career Opportunities:**
Percentage of workers who agree they "very much so" or "do" have enough opportunities for promotion or movement within their organization to achieve their career goals, using a 10-point scale.
- **Latest Tech:**
Percentage of workers who agree they are "very confident" or "confident" in using the latest technology available in their industry, based on a 10-point scale.
- **Confidence Index:**
The average of the above percentages.

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