

Global Talent Barometer

2025 June U.S. 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

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 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 globally, including over 2,000 in the U.S. 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.



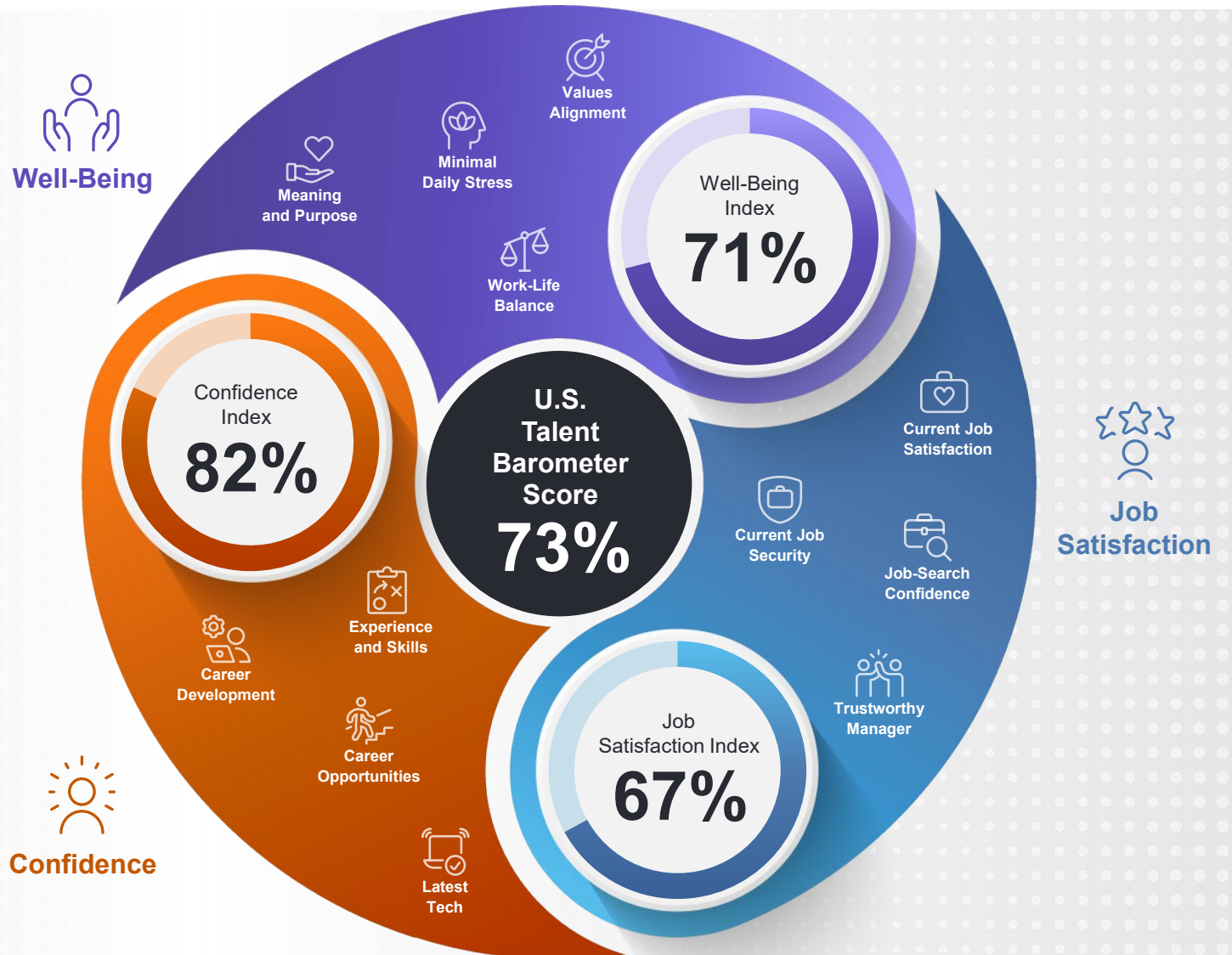
Key Findings



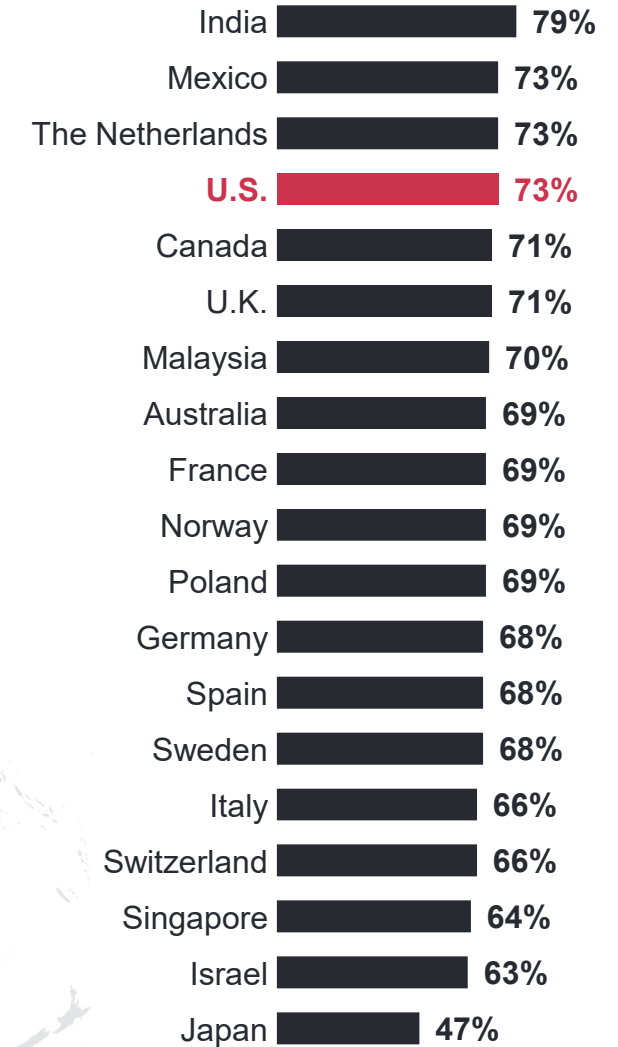
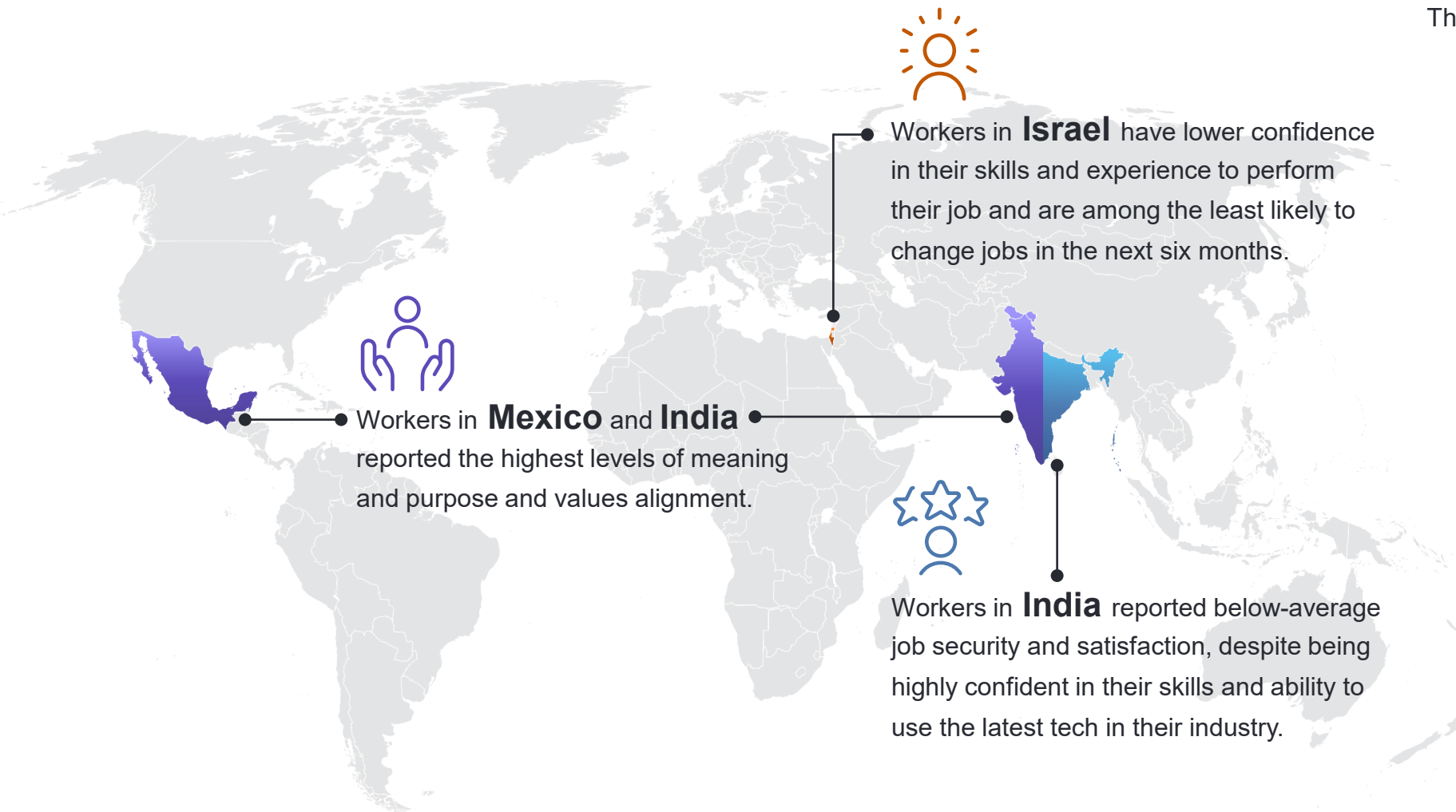
U.S. Key Findings

Now in its second installment, **the Global Talent Barometer – reflecting worker sentiments across three indices comprised of twelve distinct benchmarks – score in the U.S. stands at 73%**. Despite a decline in job satisfaction, the data reveals a 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.



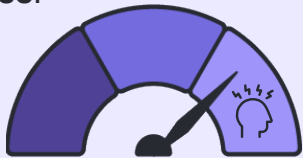
Worker Sentiment Around the World



The Stress-Retention Connection

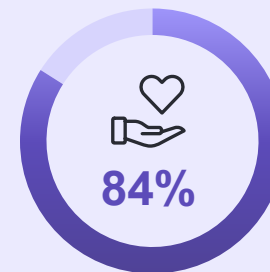
Workplace stress remains high worldwide.

Stress levels are similar between all roles, but **executive and senior-level management reported the most stress.**



Executive and Senior-Level Management

Despite nearly half of the workforce experiencing moderate to high daily stress, **most workers find their work meaningful and purposeful,**



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

Stress is exacerbated among **Gen Z: They report experiencing the highest daily stress levels.**



56%
Experience High Stress

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

Blue Collar Workers

70%

Executive and Senior-Level Management

91%

Stuck in the Middle

Job Satisfaction Decreases for Middle Managers and Women.

Millennial job satisfaction drops 10% since 2024 - the sharpest drop of any generation.

Gen Z Men

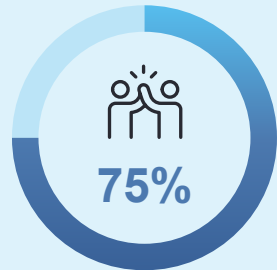
Rank lowest on the Job Satisfaction Index



33% of managers are bracing for **possible job loss** in the coming **6 months**.



Even under pressure and uncertainty, **managers continue to build trust**. More workers now **believe their managers have their backs** (+5pp) since 2024.



Most managers (60%) see **instability in the economy or company restructuring** as their **greatest career threats**.



Location signals job satisfaction as workers who are onsite without choice are less likely to leave in six months compared to their mostly onsite counterparts.



Onsite Without Choice

64%

Mostly Onsite

48%

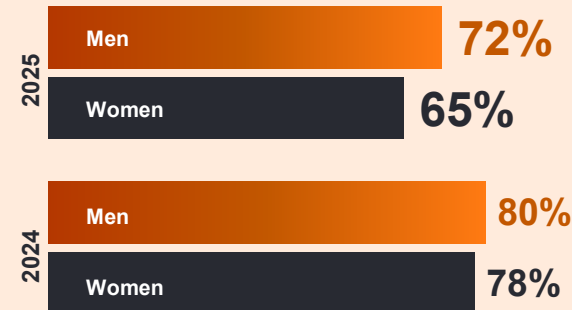
Development as Trust Currency

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

Hybrid workers and **mostly on-site workers** lead in **career confidence**.



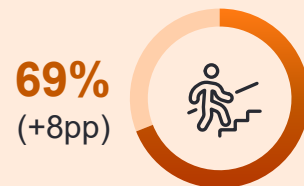
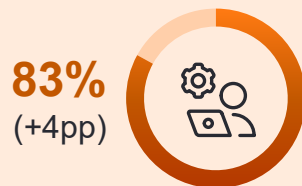
Gender inequality persists in 2025, with **women reporting fewer career moves and promotions**.



Workers in **IT** report the **strongest career growth** while **Transport, Logistics** and **Automotive** workers have the highest **skills confidence**.



Worker confidence rose +3pp 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 (+1pp).

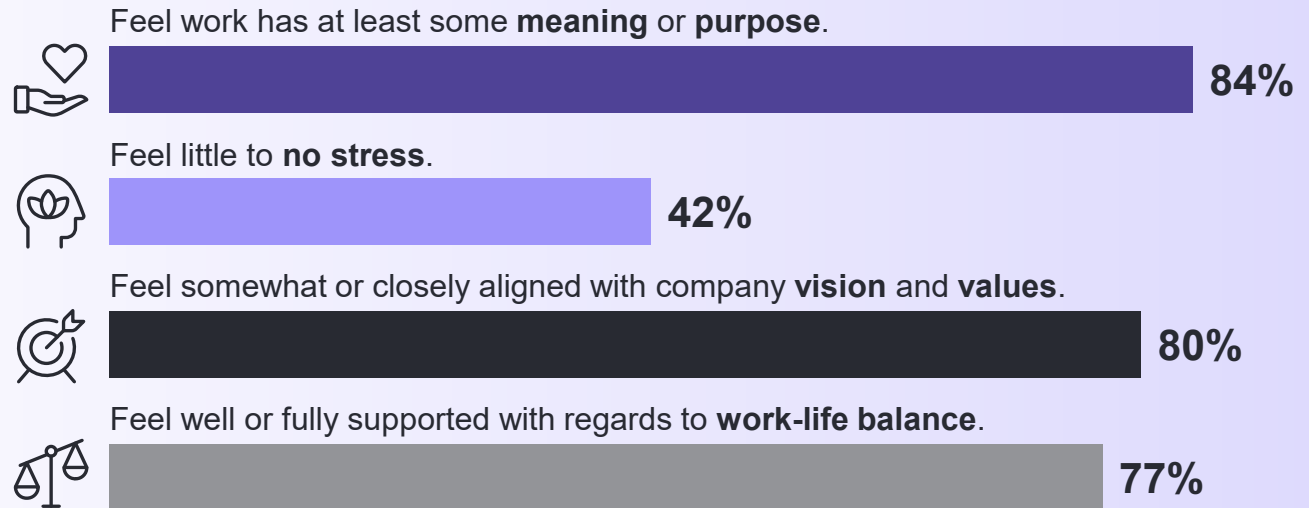


Well-Being



Better Work-Life Balance Boosts Well-Being

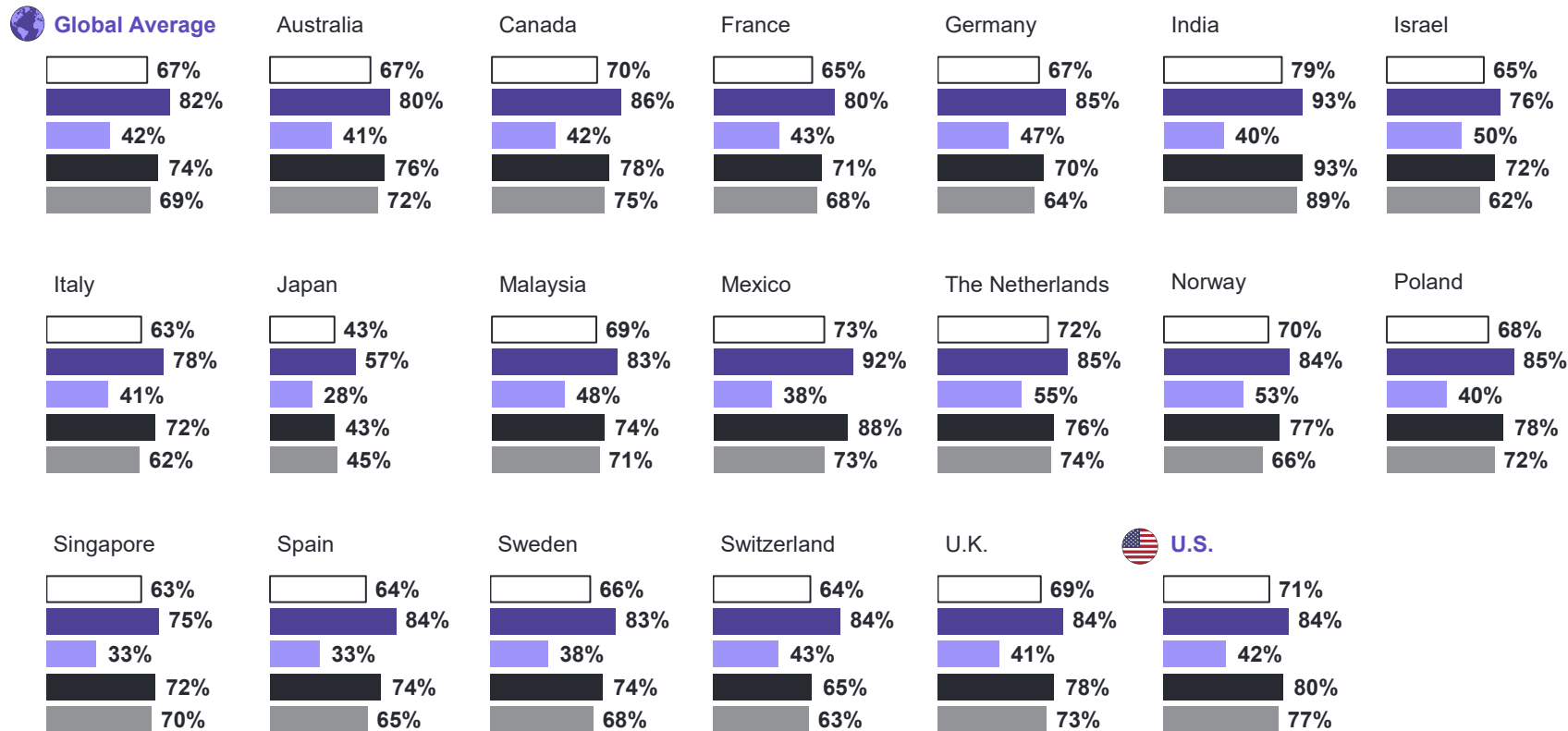
The Well-Being Index is based on four distinct benchmarks: meaning and purpose, minimal daily stress, values alignment, and work-life balance.



The Well-Being Index is 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



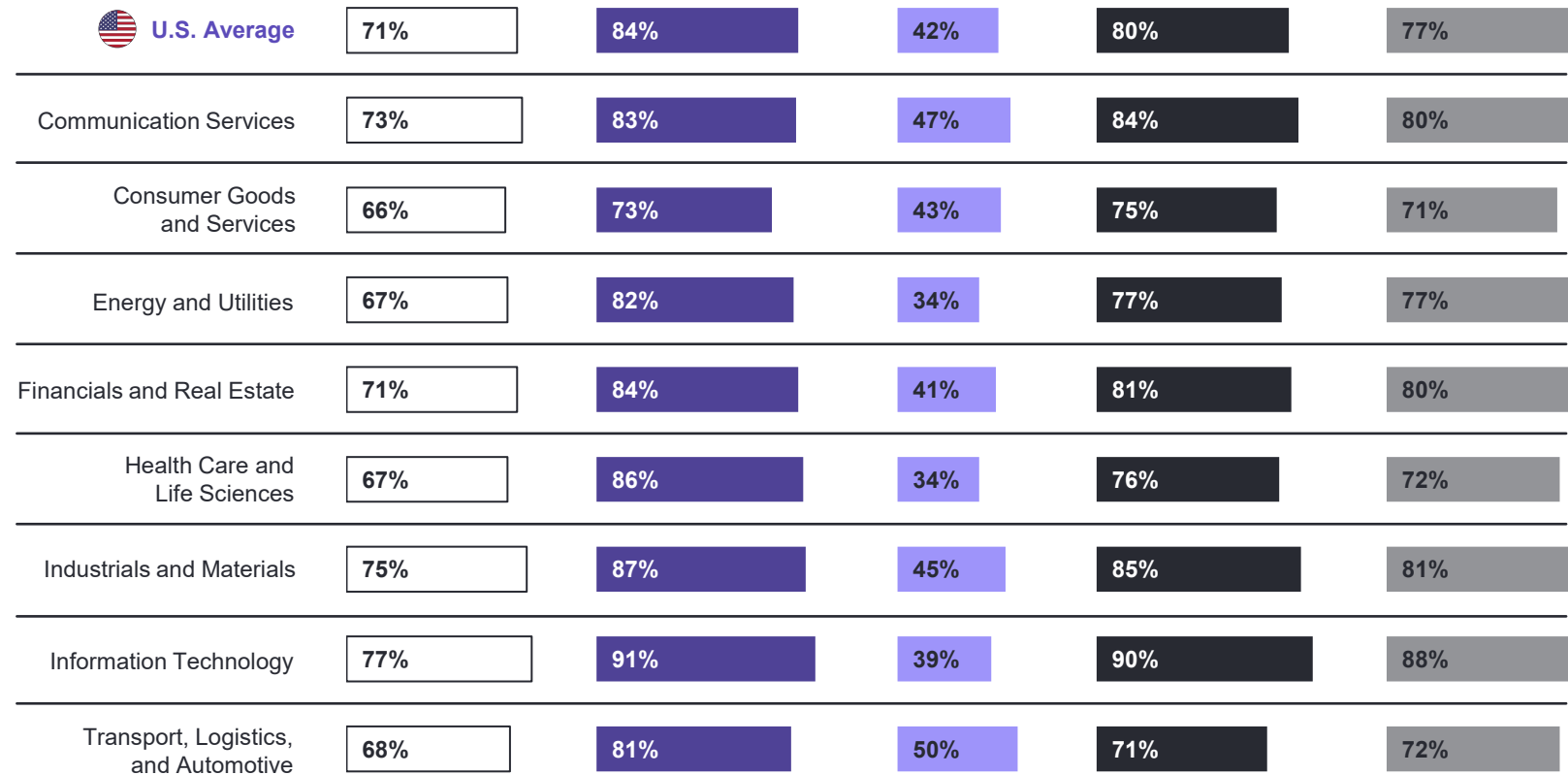
Workers in India reported the highest overall well-being, driven by meaningful work and values alignment.



Japanese workers are 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



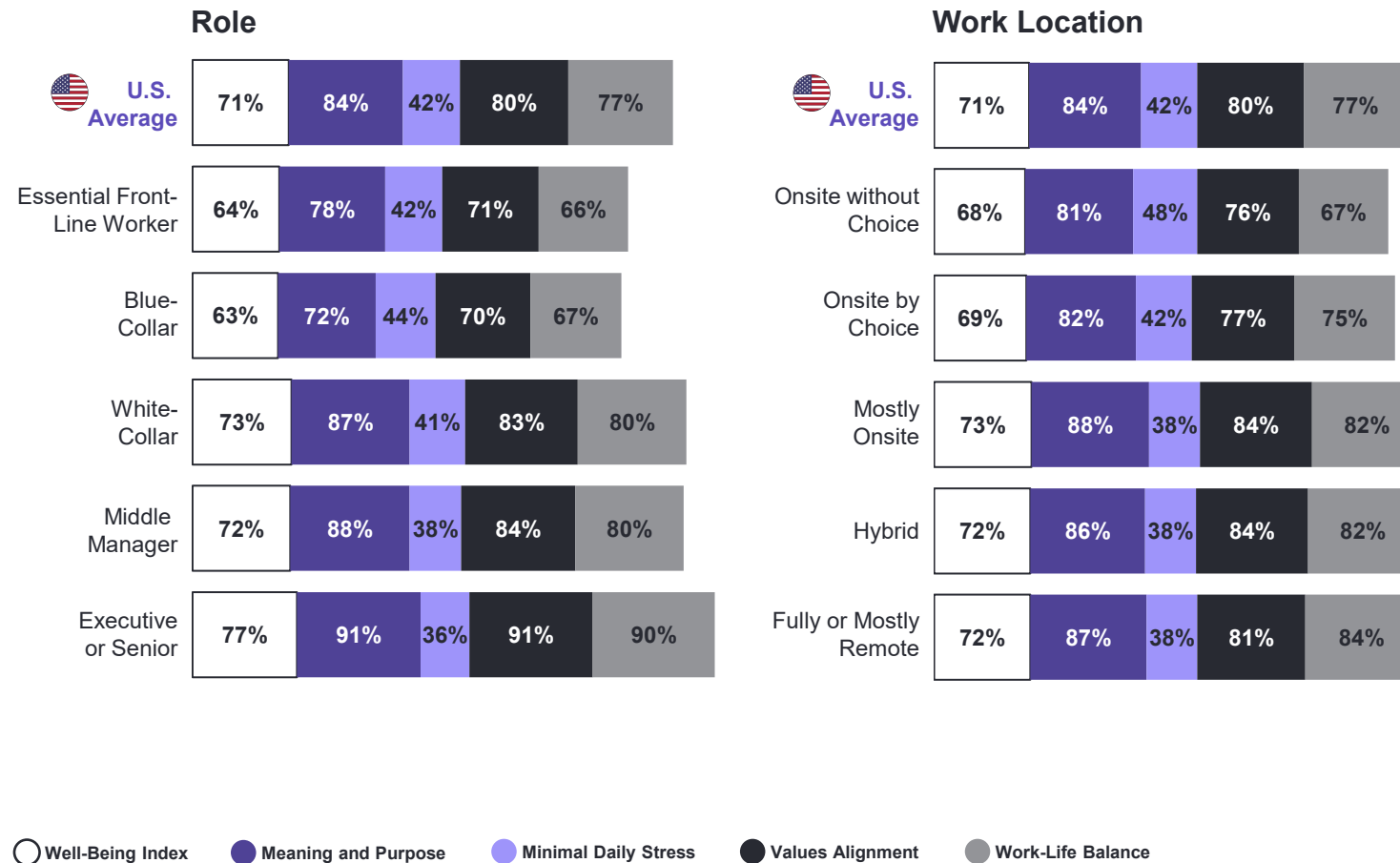
IT workers reported the greatest overall well-being.



Health Care & Life Science workers and Energy & Utilities 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.



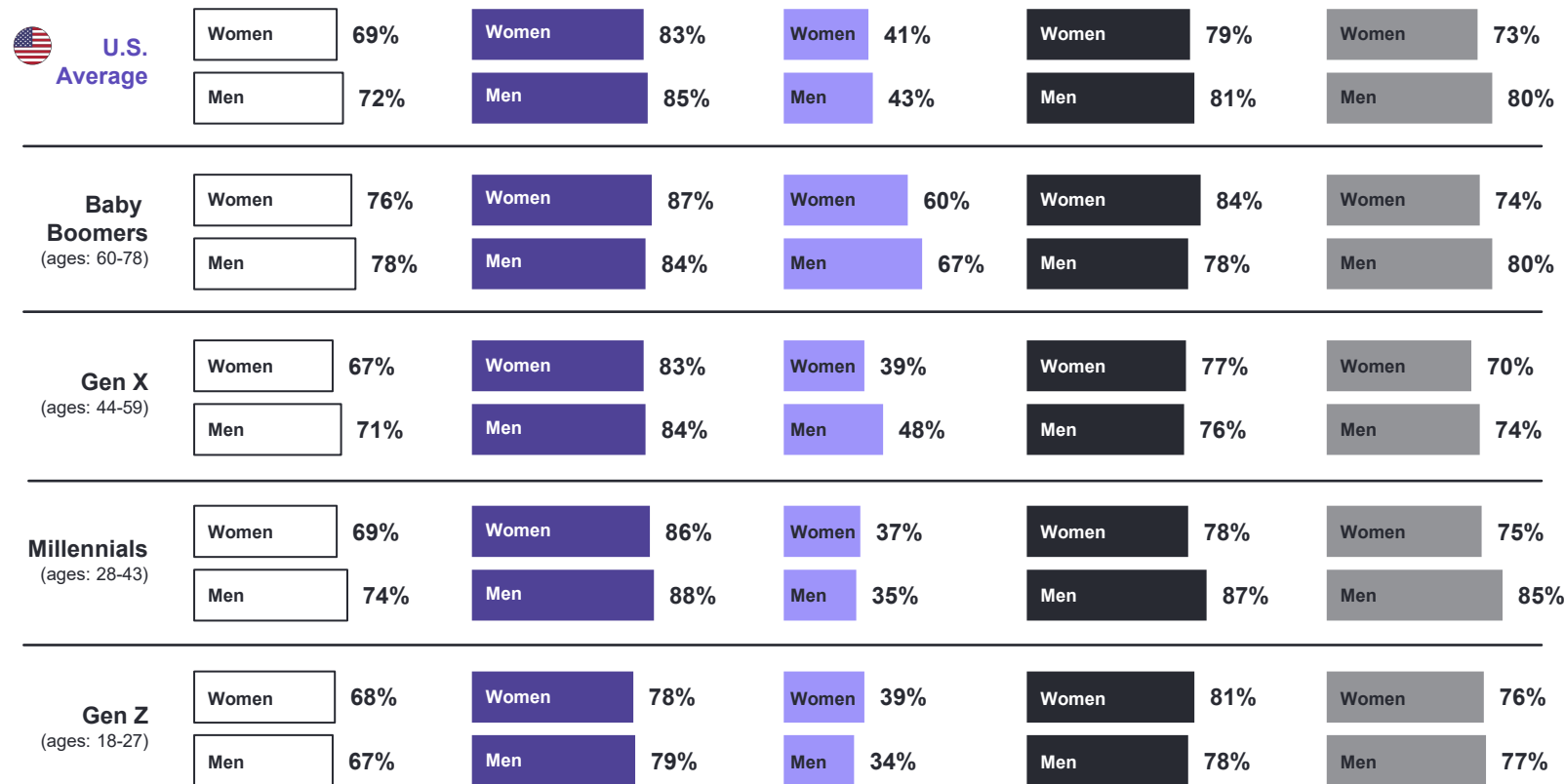
Essential front-line and blue-collar workers reported the lowest overall Well-Being across roles and work locations.



Gap in values alignment between blue collar 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 and Millennials succeed 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

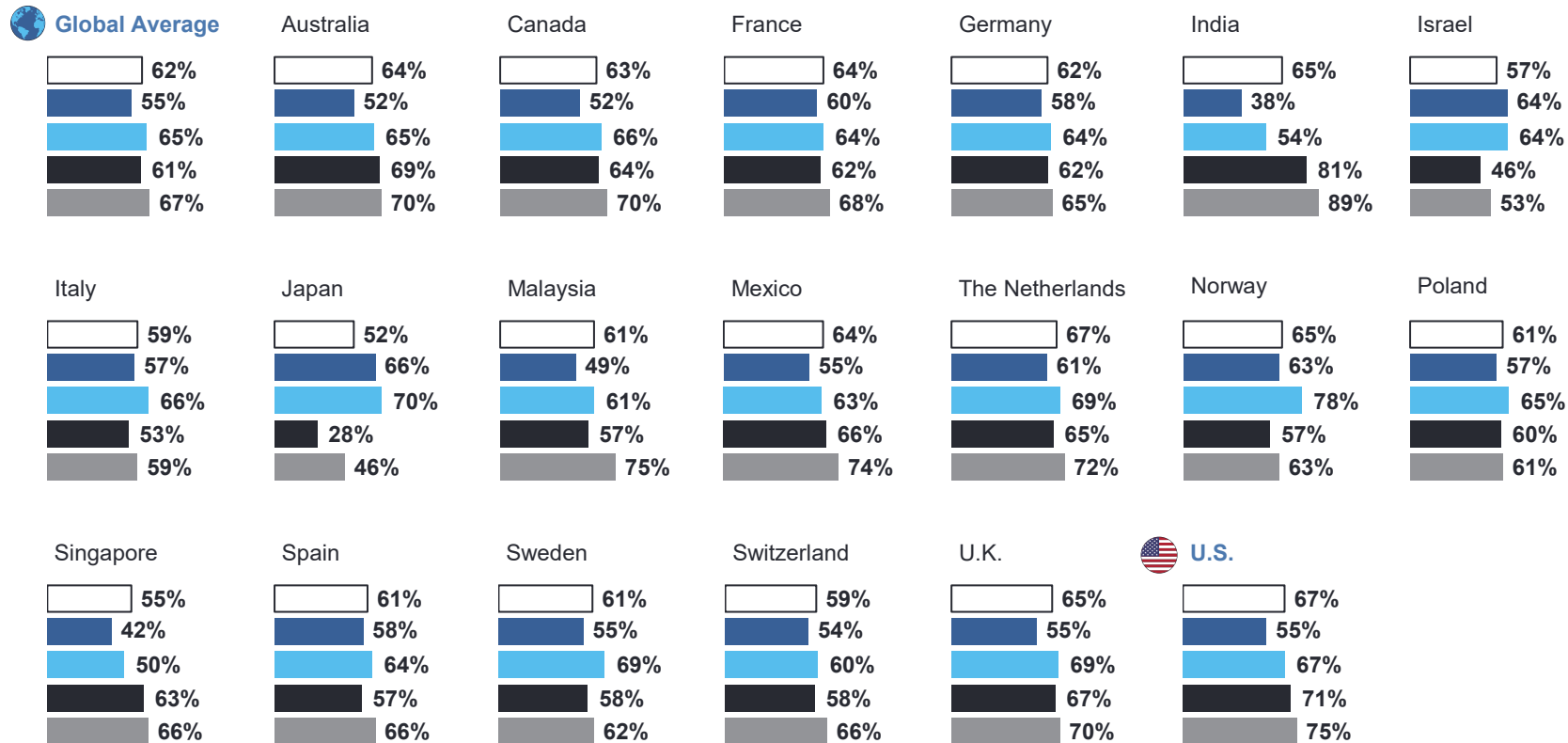
The Job Satisfaction Index is based on four distinct benchmarks: current job satisfaction, job security, job-search confidence, and manager trust.



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

Country-Level Perspectives

Explore how job satisfaction differs across countries.



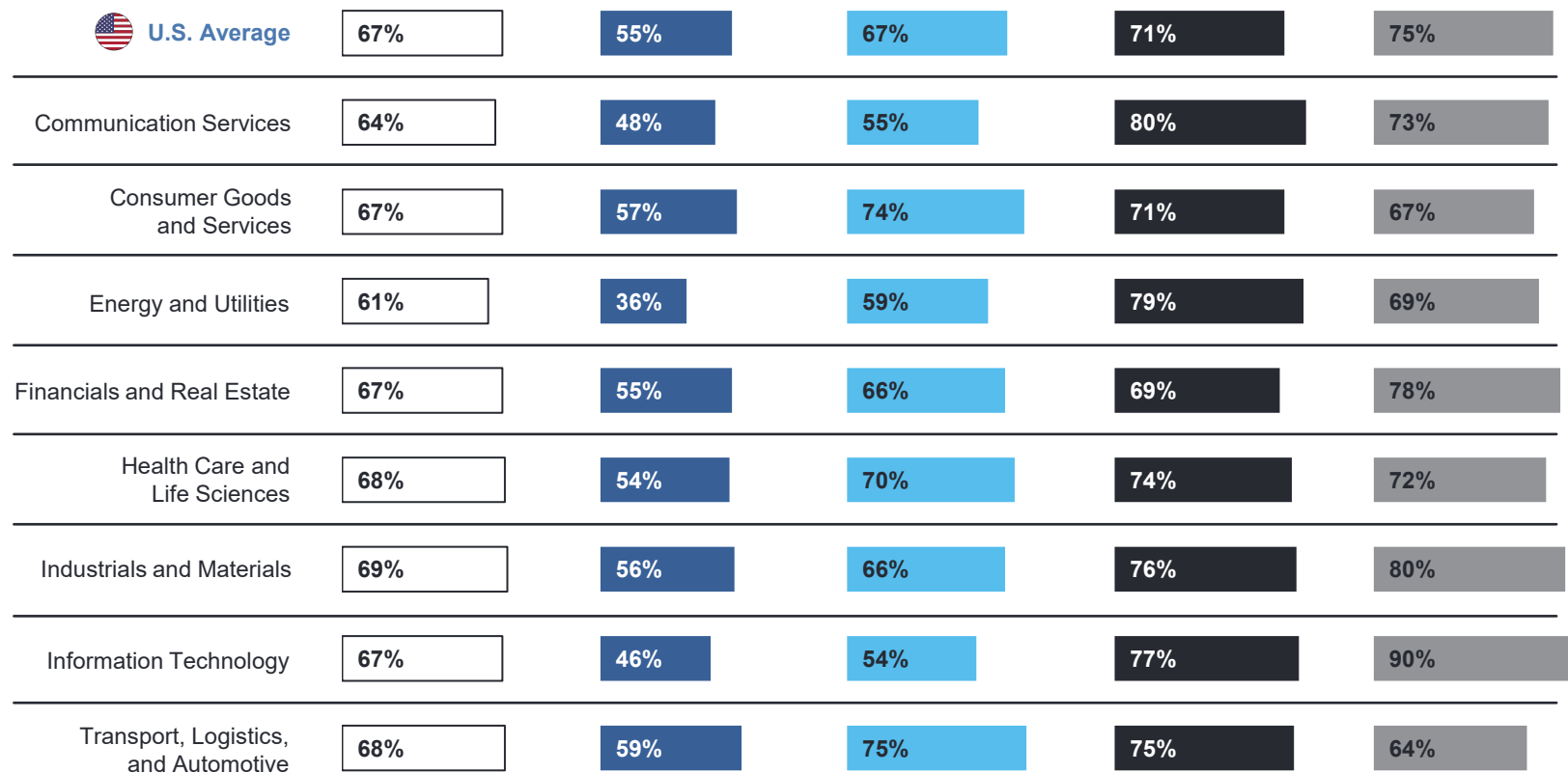
While India tops the charts for most aspects of work, they rank the lowest for job security and satisfaction, along with Singapore.



Japanese workers have the highest rate of satisfaction with their job as well as the lowest rate of job search confidence.

Industry Insights

Examine sector-specific trends in worker job satisfaction.



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



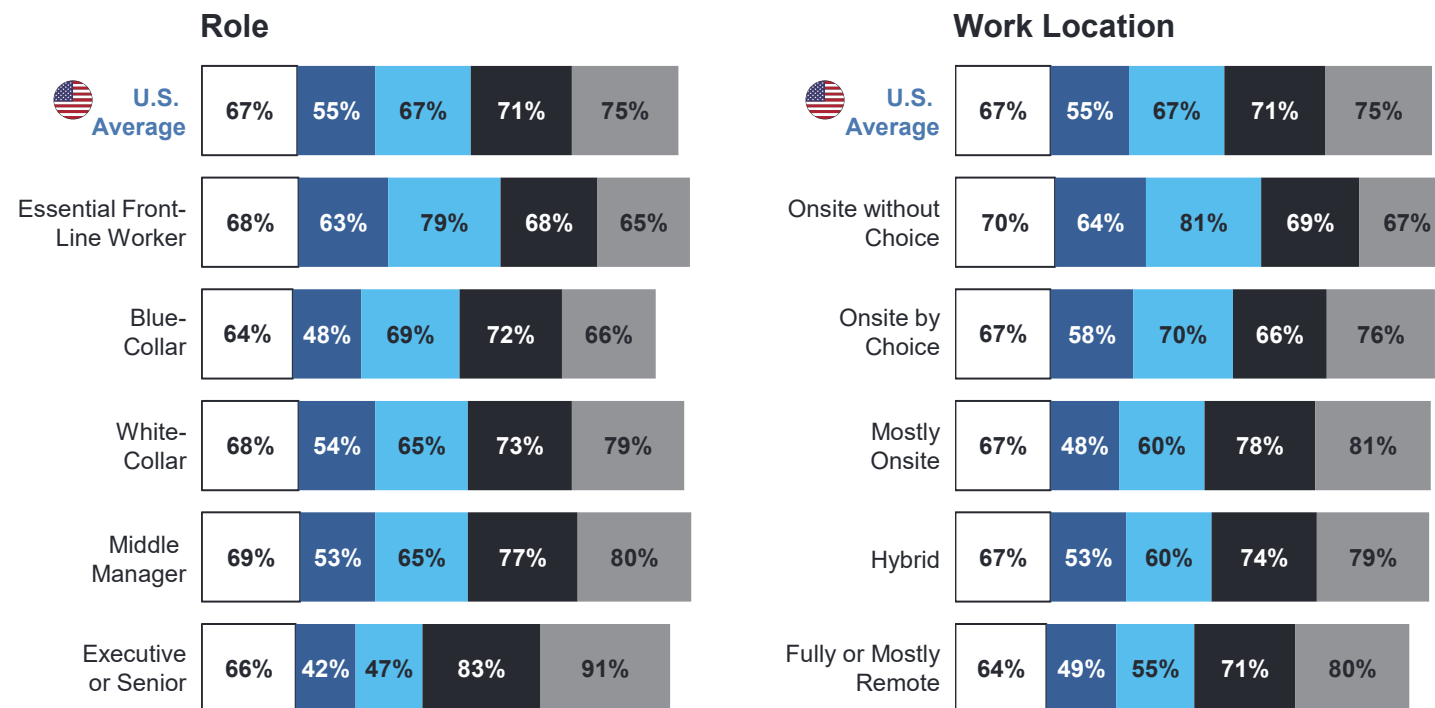
IT workers feel the least secure in their jobs while reporting the second highest job-search confidence.



Managers are reportedly the least trustworthy in the Transport, Logistics and Automotive industry.

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



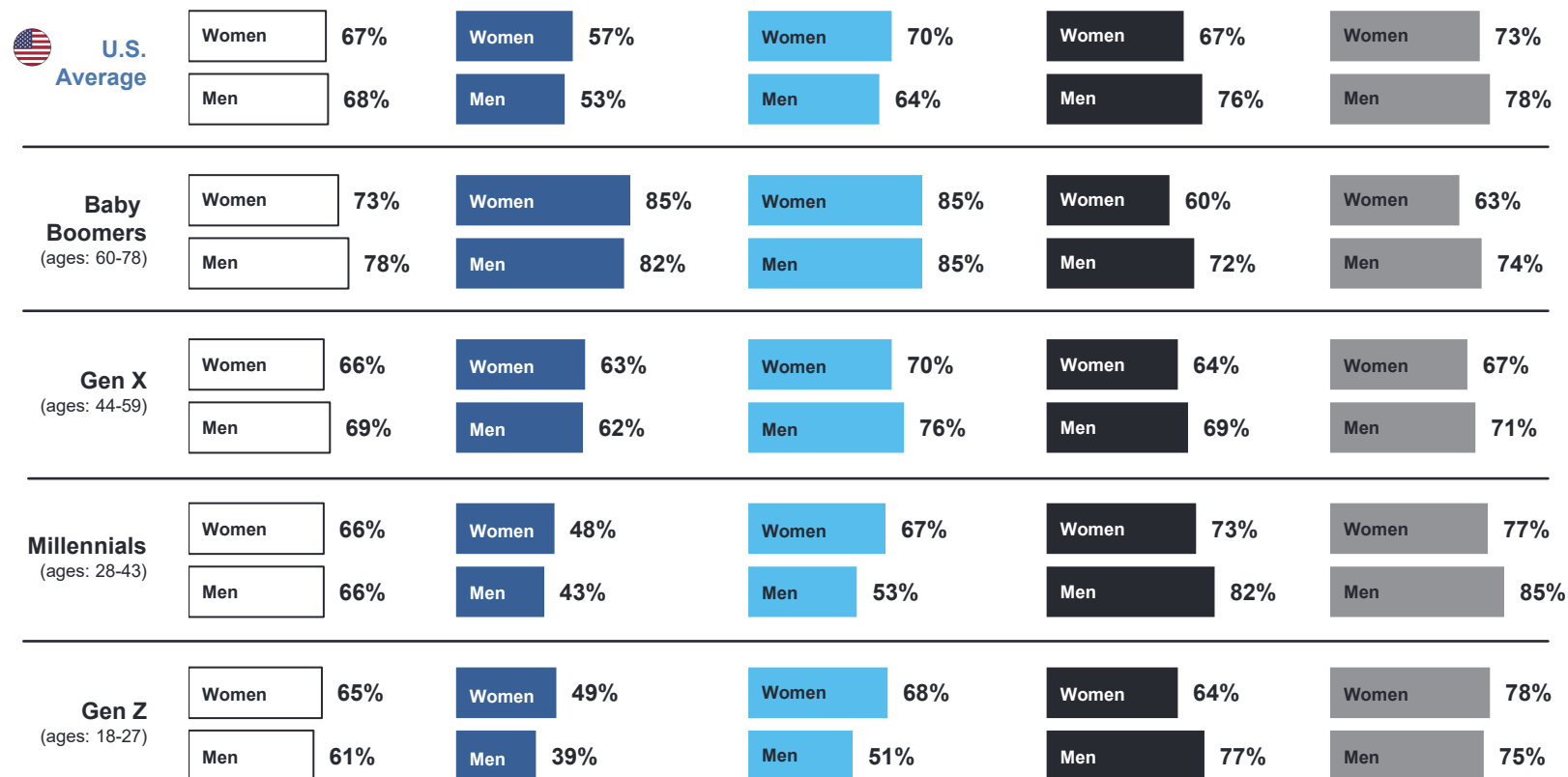
Essential frontline workers feel the most secure in their jobs, while executive or senior-level roles are the least secure.



Workers onsite without a choice are 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 men are the most likely to say they want to voluntarily leave their current employer, while also feeling the least secure in their jobs.



Millennials report the steepest drop in current job satisfaction, decreasing ten percentage points since 2024.

Confidence



Rising Confidence and Career Growth

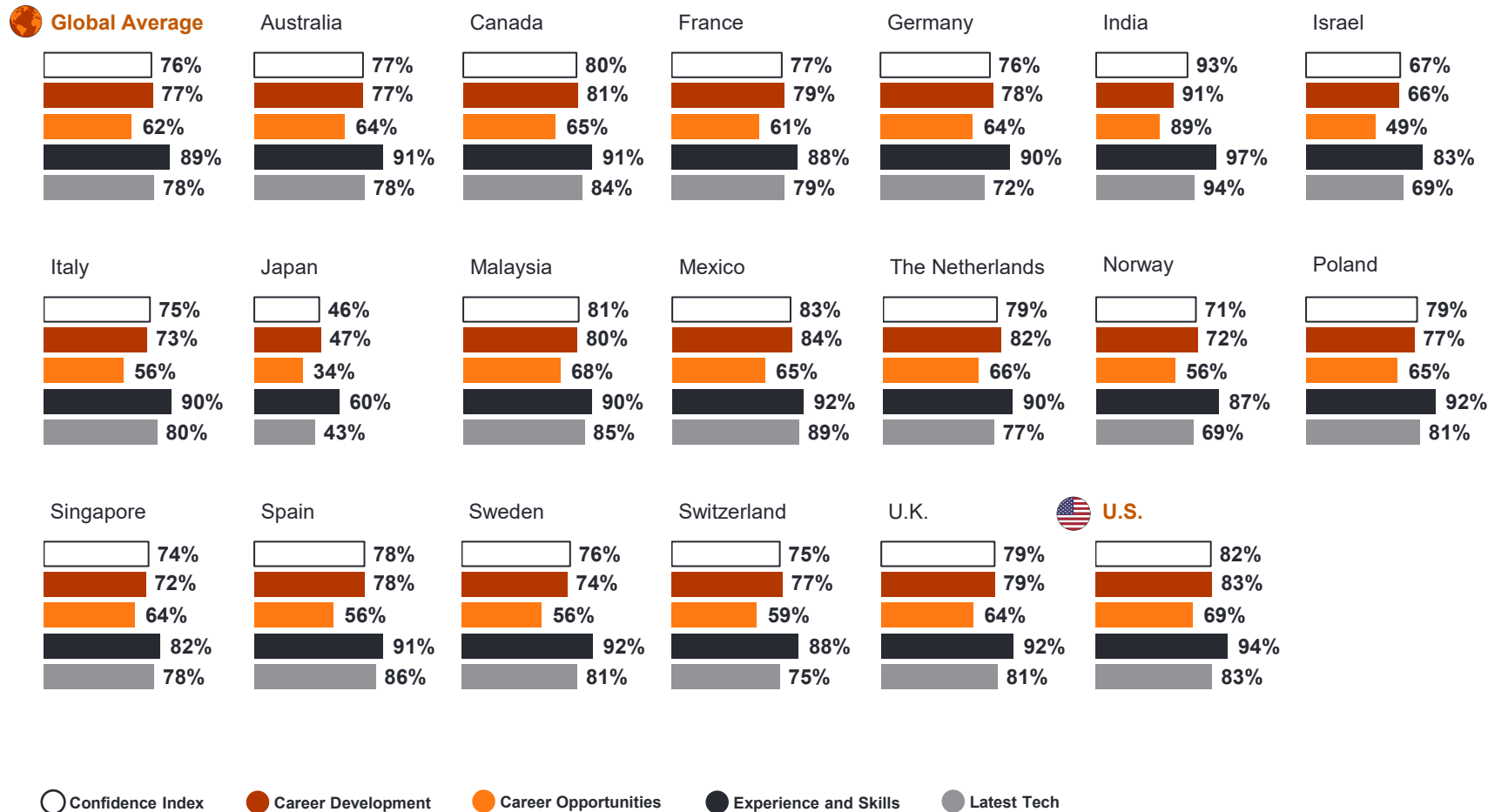
The Confidence Index is based on four distinct benchmarks: career development, career opportunities, experience and skills, and tech and tools.



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

Country-Level Perspectives

Examine how worker confidence is experienced around the globe.



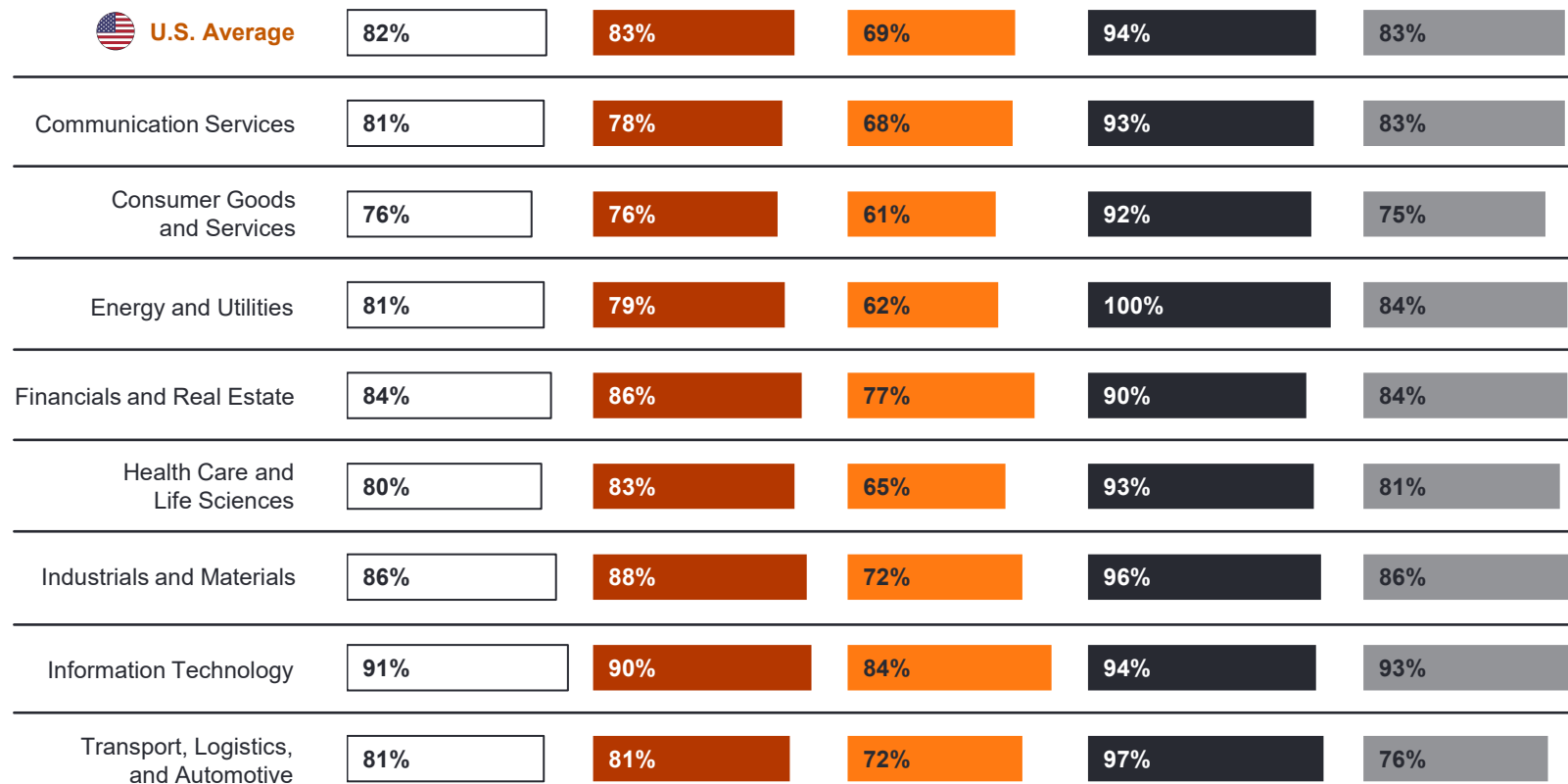
India reported the best overall workforce confidence and the strongest worker sentiment across all four benchmarks.



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



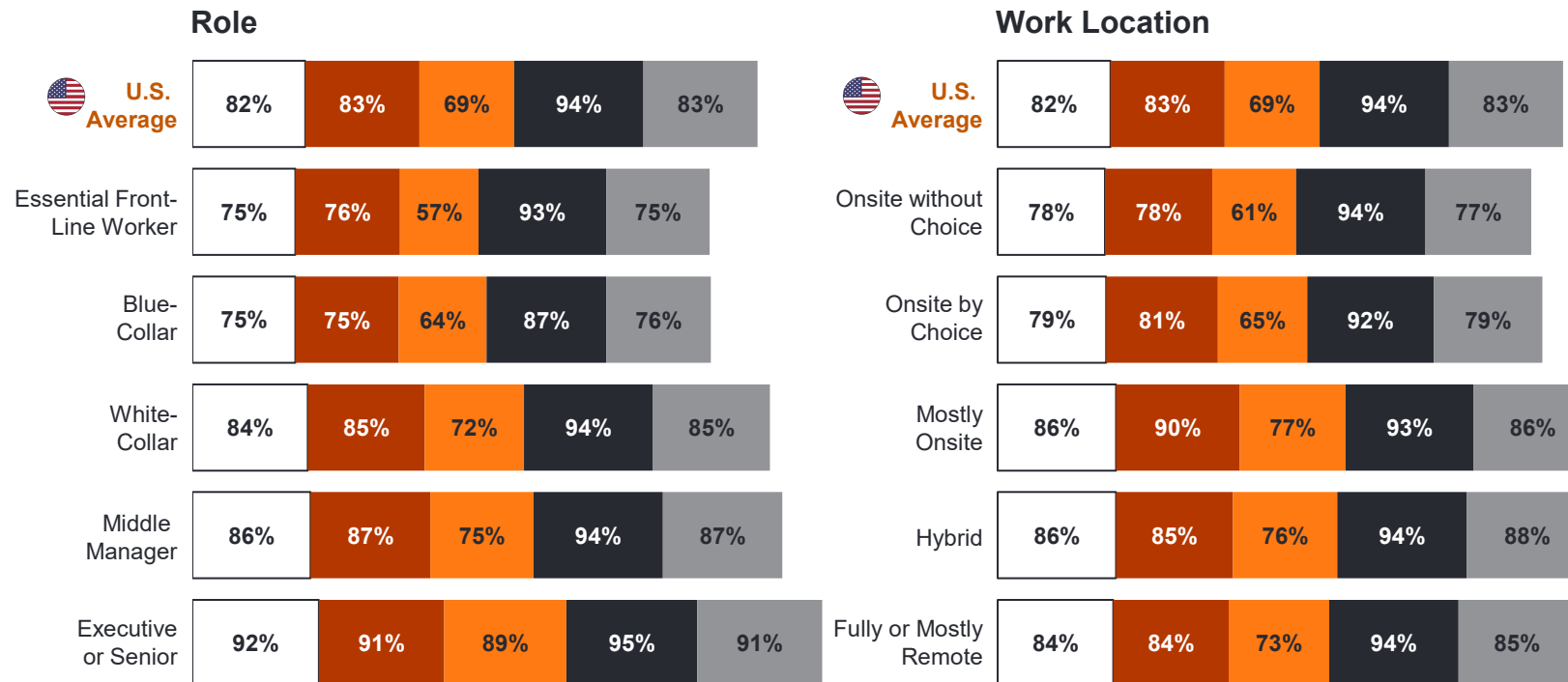
Consumer Goods and Services report the lowest confidence, especially when it comes to career development and opportunities.



IT workers reported the best career development opportunities, along with the highest level of skills confidence.

Role and Location Trends

Analyze how different roles and work settings influence employee confidence.



Confidence Index Career Development Career Opportunities Experience and Skills Latest Tech



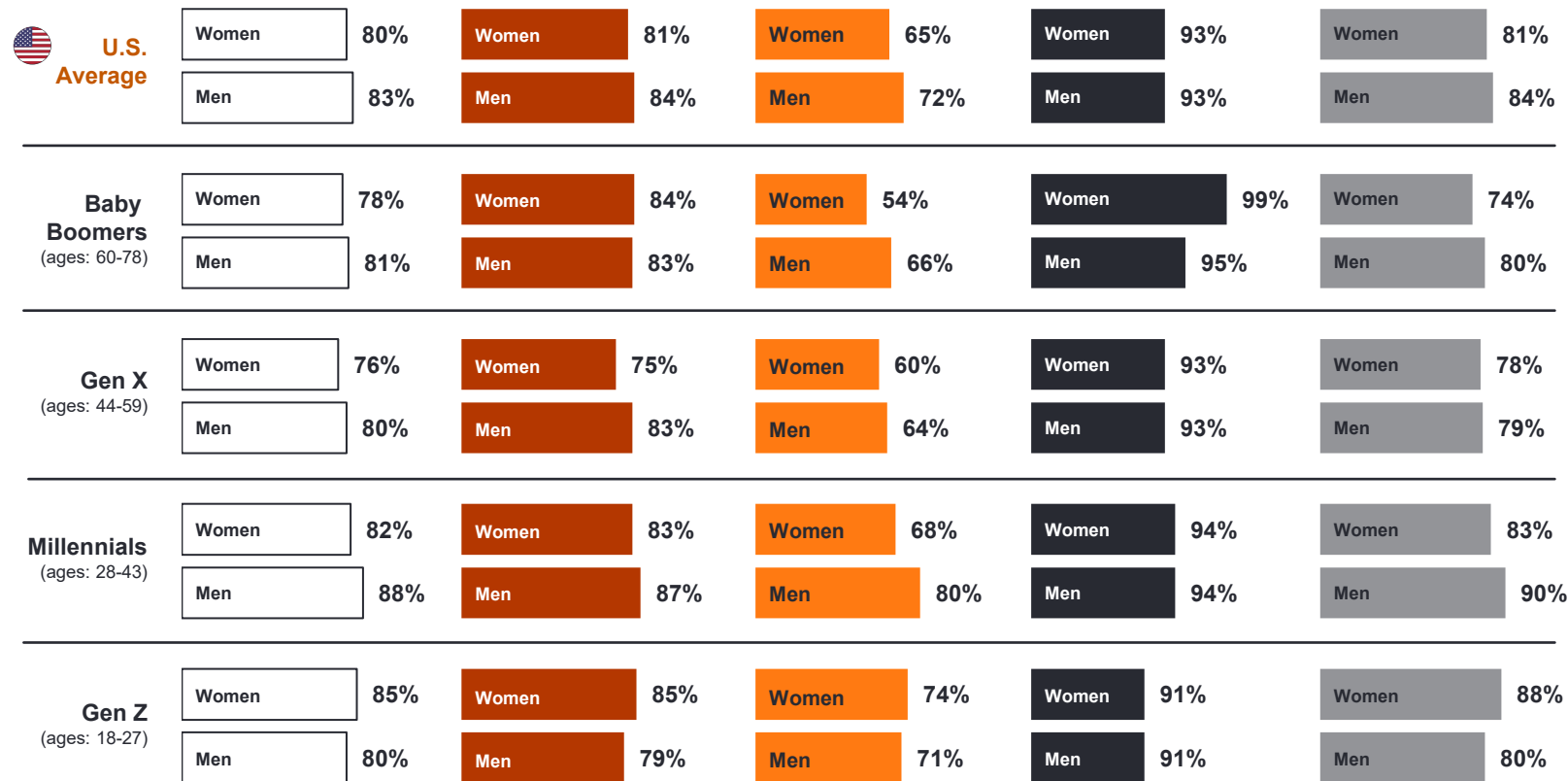
Essential front-line workers and those who are onsite without choice reported the lowest career opportunities.



Mostly onsite workers expressed the highest confidence in 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 Baby Boomers report the smallest gender differences across all confidence benchmarks.



Millennials and Baby Boomers report 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 Form 10-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 Well-Being Index is an 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 Job Satisfaction Index is an 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 "very much so" or "do" feel they have the right technology and tools available to do their job to the best of their ability, based on a 10-point scale.
- **Confidence Index:**
The Confidence Index is an average of the above percentages.

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