

# Global Talent Barometer

2025 June —

APME Report and Key Findings



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*Becky Frankiewicz***Becky Frankiewicz**President & Chief Strategy Officer,  
ManpowerGroup

# 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.



**François Lançon**

Regional President, APME  
ManpowerGroup

## A Message from Our Regional President, APME

Across APME, the pace of transformation is accelerating—driven by AI, automation, and evolving expectations around work. Industries are being reshaped, and organizations are navigating new realities. Amidst the excitement around AI and emerging tech, it's important to remember that **digital transformation is not just about technology, it's about people.**

The true differentiator in this new era will be how well we invest in people—how we develop critical skills, unlock potential, and create meaningful career pathways that are inclusive, future-focused, and sustainable.

Our latest Global Talent Barometer offers a timely look at how workers across the region are feeling. While confidence in the

future remains strong, job satisfaction is not keeping pace. Notably, almost a third of workers say they lack opportunities for advancement within their current organizations. This is sending a clear signal: **people are looking for more than just a paycheck. They want flexibility, balance, growth, and a sense of purpose.** They want to feel supported and empowered to shape their own futures.

When development is prioritized, people tend to feel more engaged, more resilient, and more committed. And when organizations actively support career progression and well-being, they don't just retain talent; they unlock performance, innovation, and long-term value.

In a region as diverse, dynamic, and fast-moving as APME, the connection between individual growth and organizational success is both a challenge and an opportunity. **The Global Talent Barometer shows that organizations that will lead are those that treat talent as a strategic advantage**—designing work that builds capability, fosters adaptability, and puts people at the center of transformation.

These insights call us to listen more closely, act more decisively, and lead more humanely. Because the future of work in APME will be shaped not just by the technologies we embrace, but by the people we choose to empower.

# APME 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, including 3,536 in Asia Pacific and Middle East (APME). 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.





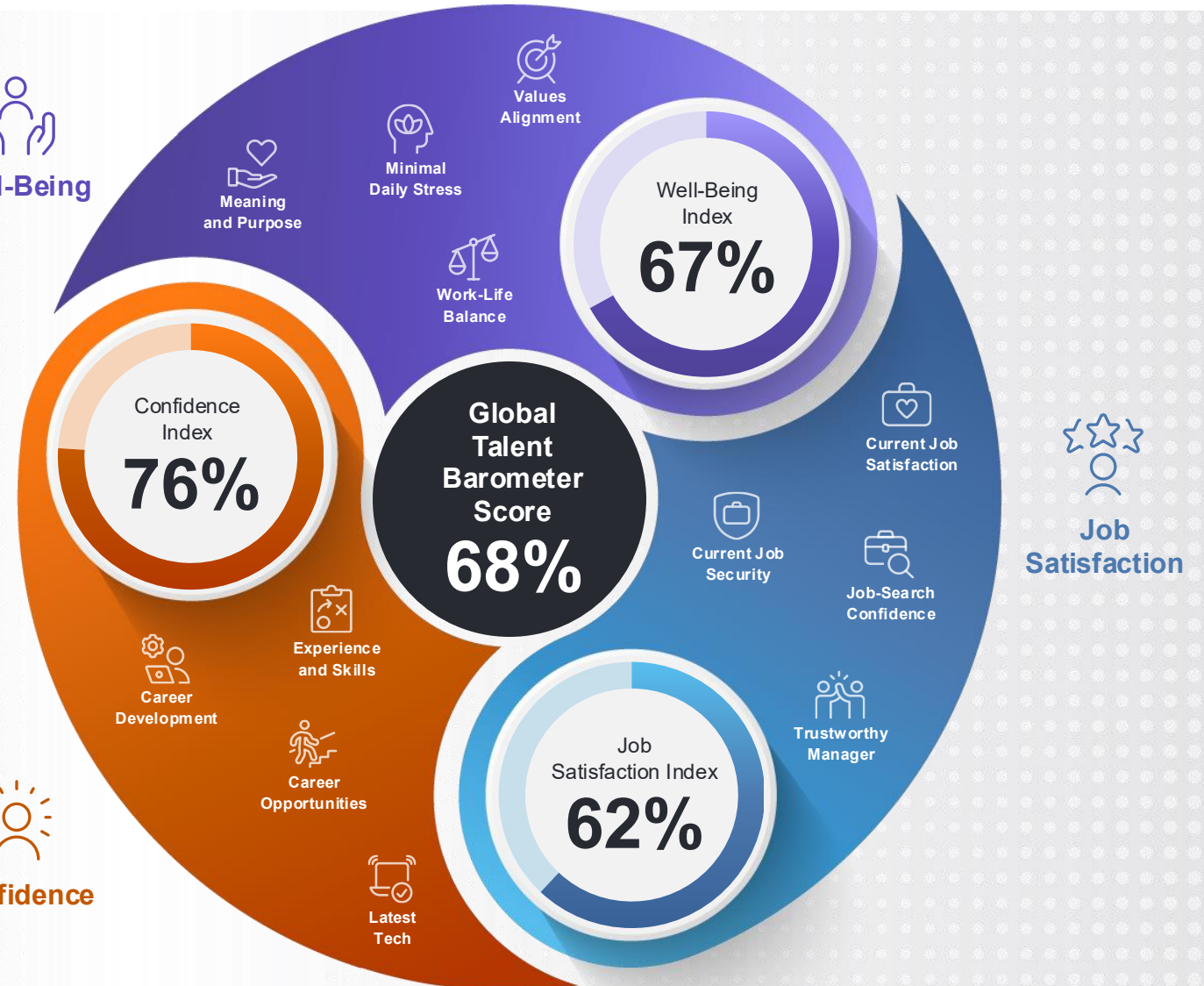
# Key Findings



# Global Key Findings

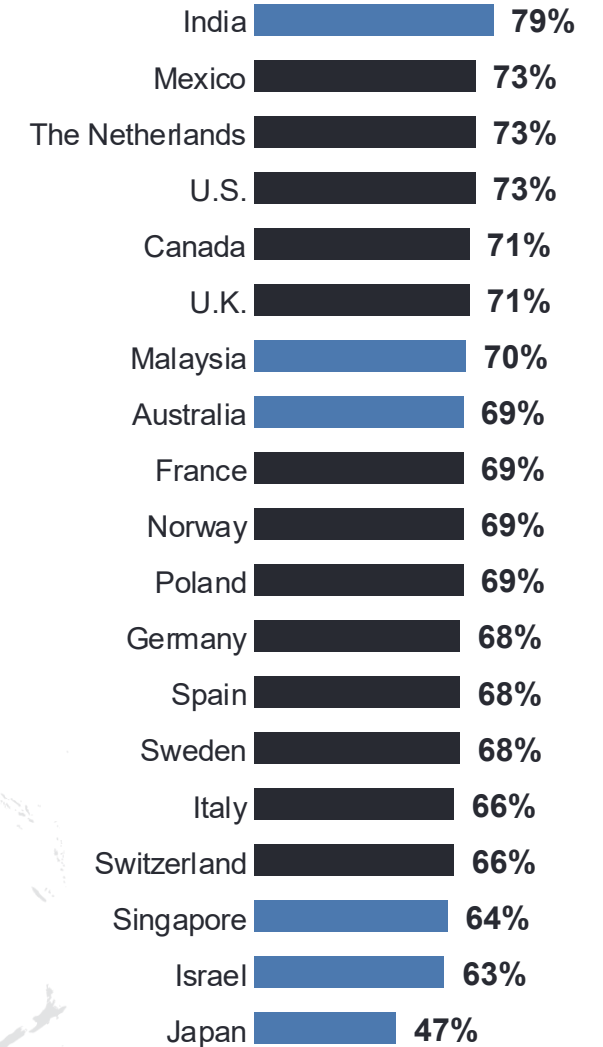
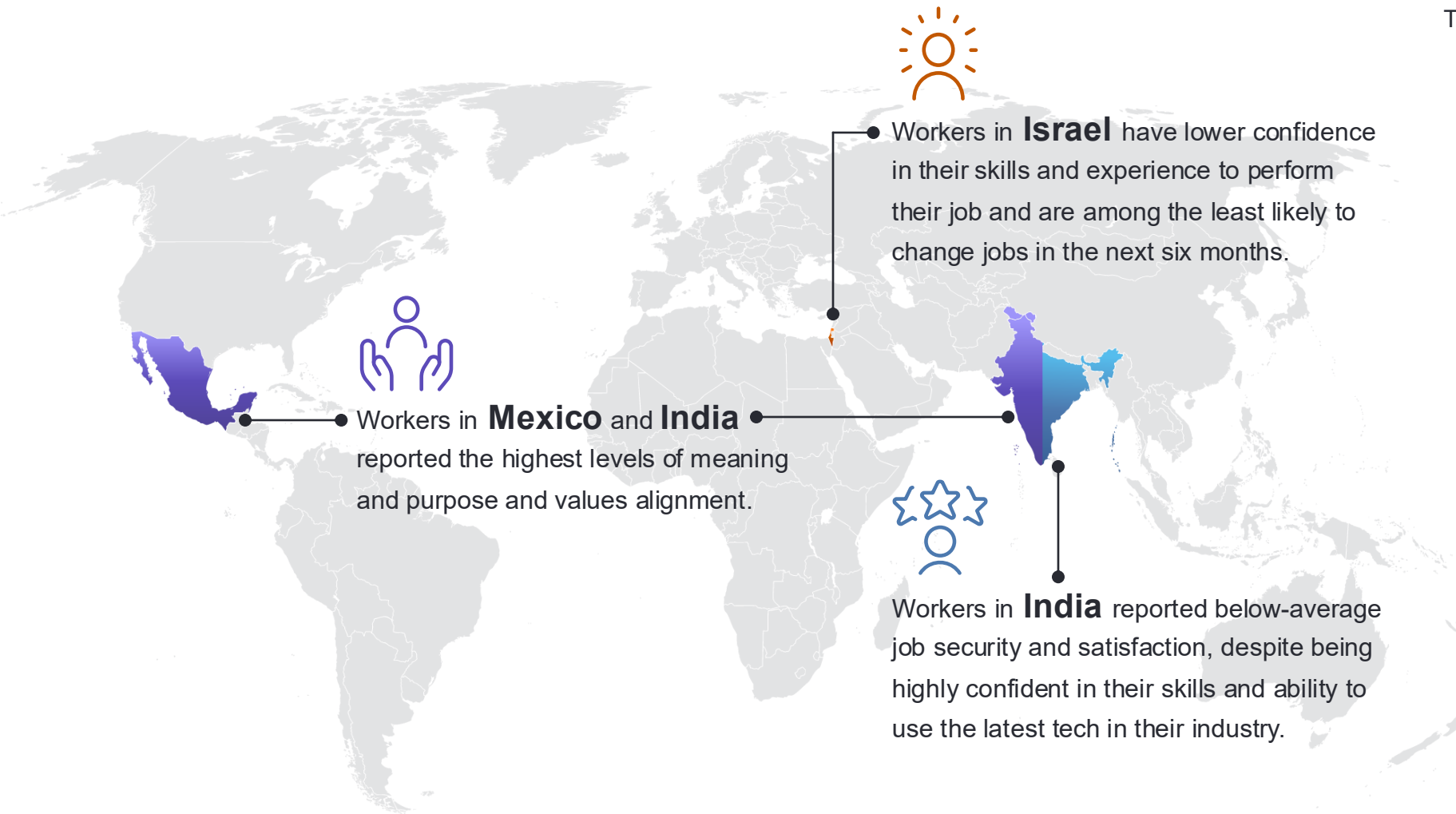
Now in its second installment, the **Global Talent Barometer** – reflecting worker sentiments across three indices comprised of twelve distinct benchmarks – **stands at 68%**. Despite a decline in job satisfaction, the data reveals a notable rise in workers' confidence and overall well-being.

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.





# Worker Sentiment Around the World

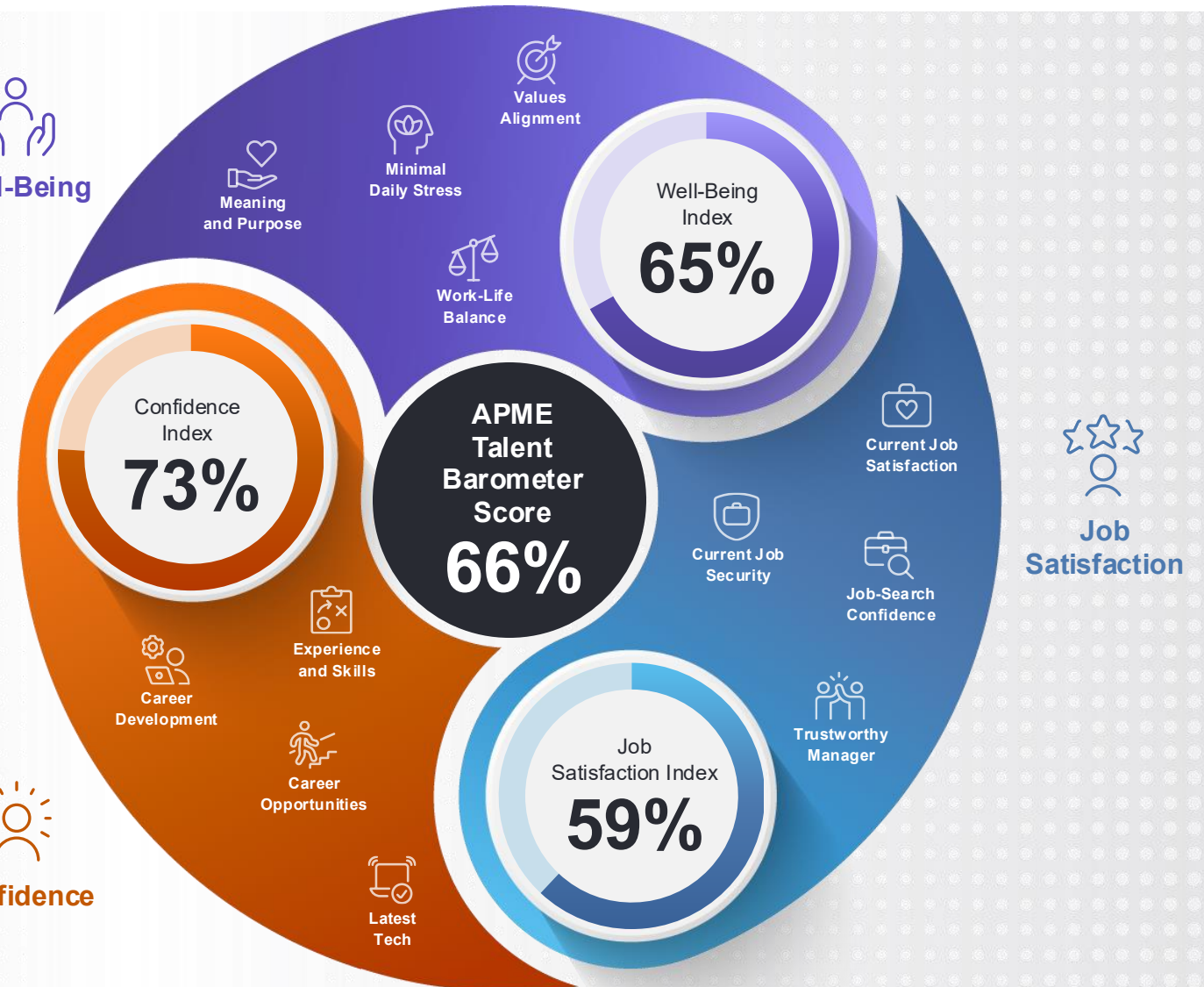




# APME Key Findings

Now in its second installment, the **Global Talent Barometer** score in APME – reflecting worker sentiments across three indices comprised of twelve distinct benchmarks – stands at **66%**.

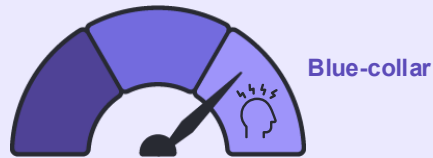
The research reveals what employees need and value most, helping employers understand and act on key drivers to attract and retain top talent in a changing world of work.



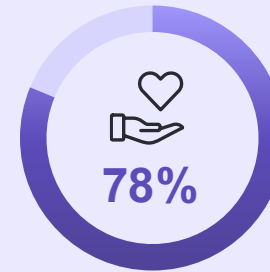
# The Stress-Retention Connection

Workplace stress remains high in APME.

Stress levels are similar between all roles, but **blue-collar workers reported the most stress.**



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



More than half (**55%**) are **concerned** about their **workload impacting work-life balance.**

Stress is exacerbated among **Gen Z** in APME: They **experience the highest daily stress levels**, despite feeling \supported.



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

Essential Workers

58%

Executive and Senior-Level Management

85%

# Stuck in the Middle

Younger workers report **lower job satisfaction** in APME.

**Gen Z** workers in APME reported **the lowest job satisfaction (37%)** compared to other generations.

## Gen Z Women

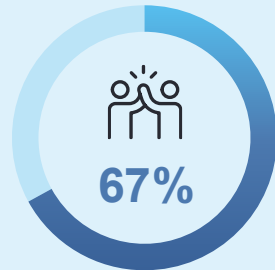
Rank lowest on the Job Satisfaction Index



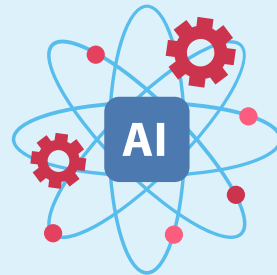
37% of managers are bracing for **possible job loss** in the coming **6 months**.



Even under pressure and uncertainty, **managers continue to build trust**. Nearly 7 of 10 workers now **believe their managers have their backs**.



Most managers (82%) feel their careers are at risk, primarily due to **economic instability, restructuring, and AI**.



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



Onsite Without Choice

63%

Fully or Mostly Remote

37%



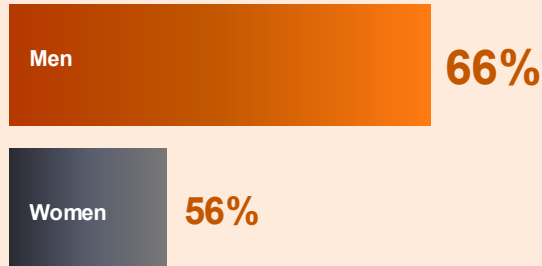
# Development as Trust Currency

Employees in APME benefit from **improved career pathing and development.**

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



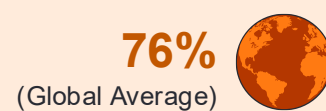
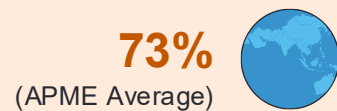
Gender inequality persists in 2025, with **women reporting fewer career moves and promotions.**



APME Workers in **Financials and Real Estate** report the **highest career growth and opportunities.**



Worker confidence in **India** is **strongest** across all four benchmark, **regionally and globally (93%).**



**Executive and senior managers** have been the **most active** in skills training or pursuing further education over the past 6 months.



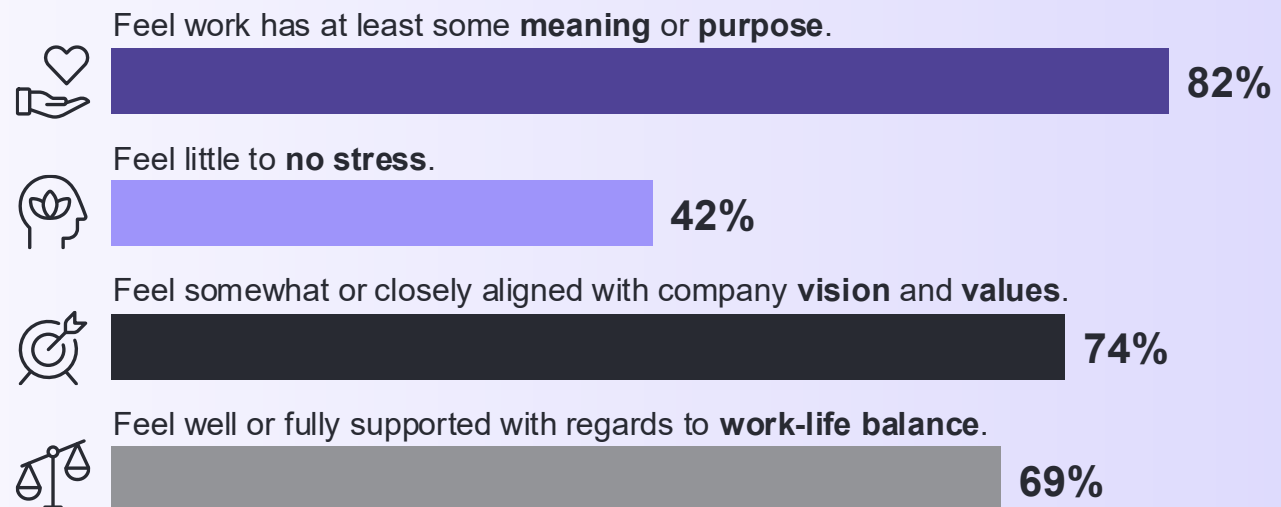
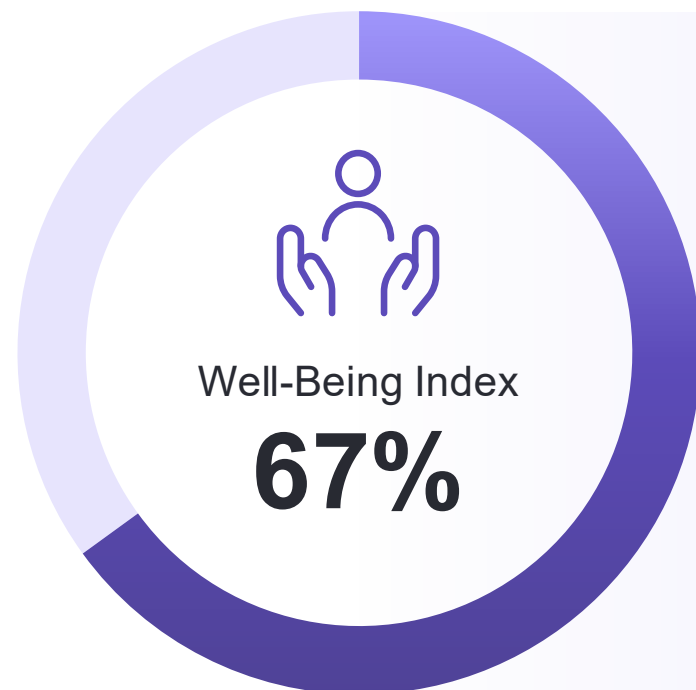


# Well-Being



# 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.

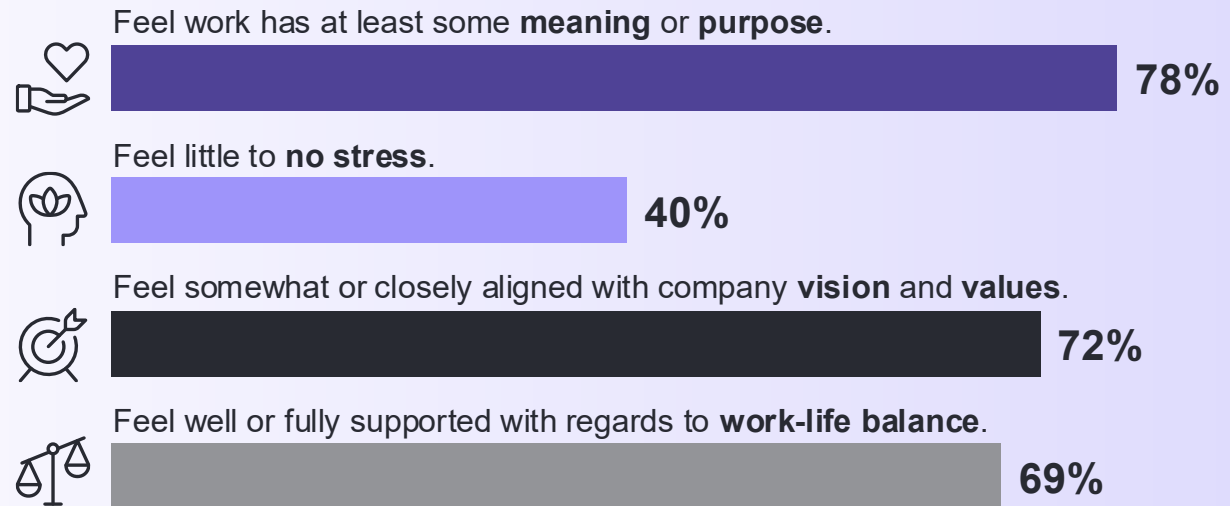


The Well-Being Index an average of the above percentages. Learn more about the [Methodology](#).



# Better Work-Life Balance Boosts Well-Being (APME)

The Well-Being Index is based on four distinct benchmarks:  
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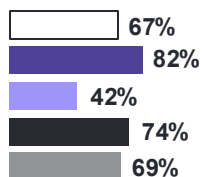


The Well-Being Index an average of the above percentages. Learn more about the [Methodology](#).

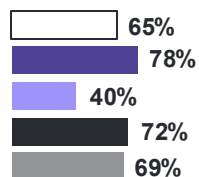
# Country-Level Perspectives in APME

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

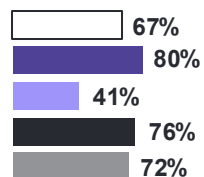
Global Average



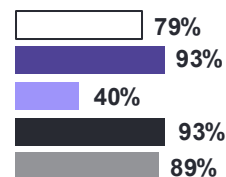
APME Average



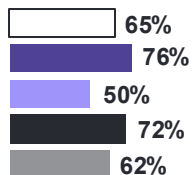
Australia



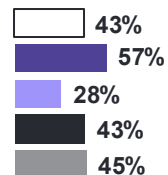
India



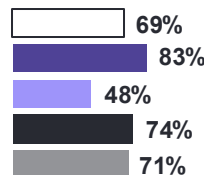
Israel



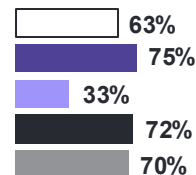
Japan



Malaysia



Singapore



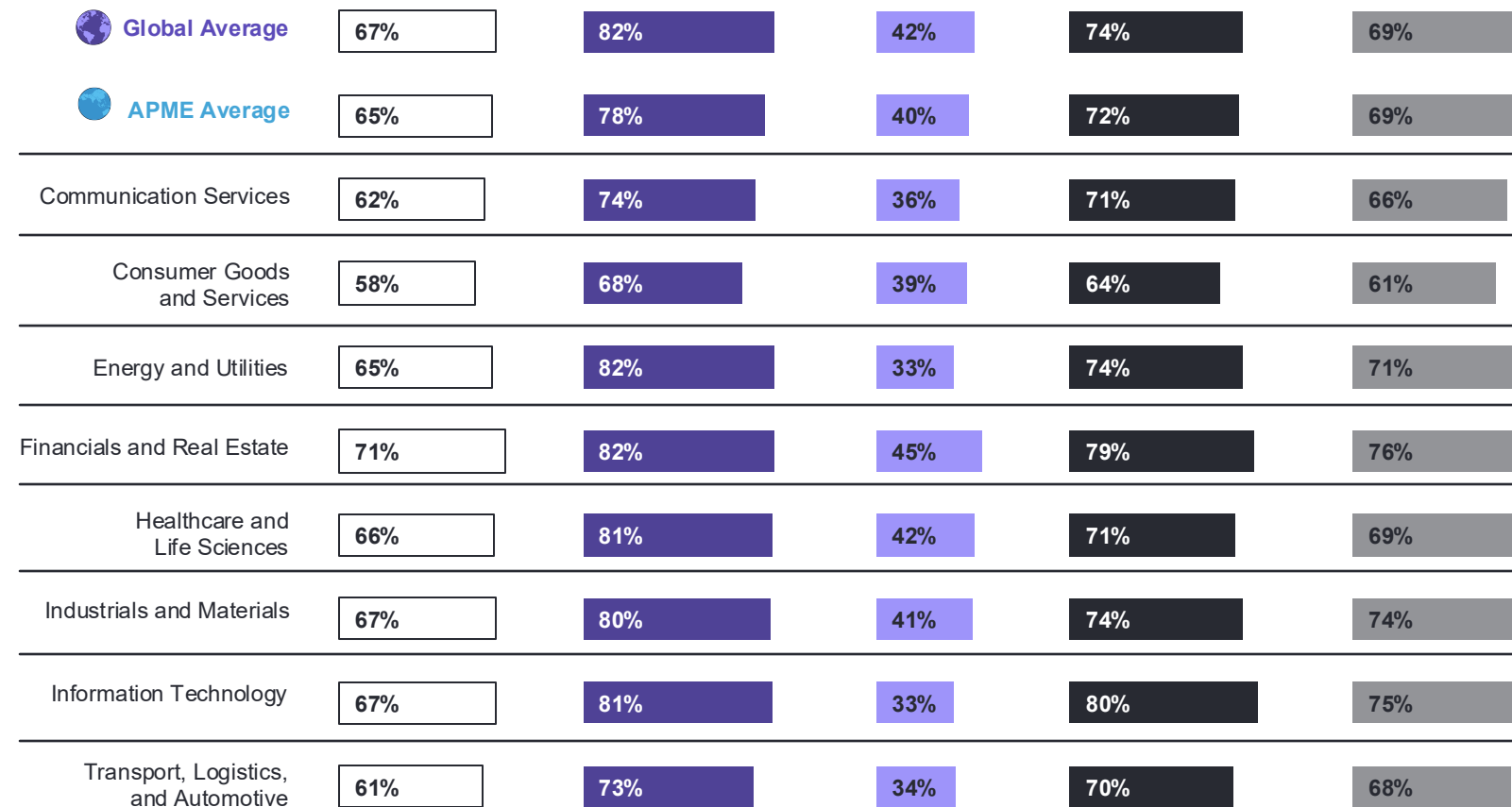
**Workers in India reported the highest overall well-being, driven by meaningful work and values alignment.**



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

# Industry Insights in APME

Explore how well-being differs across key industry verticals.



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



**Financials & Real Estate**  
workers reported the  
greatest overall well-  
being.

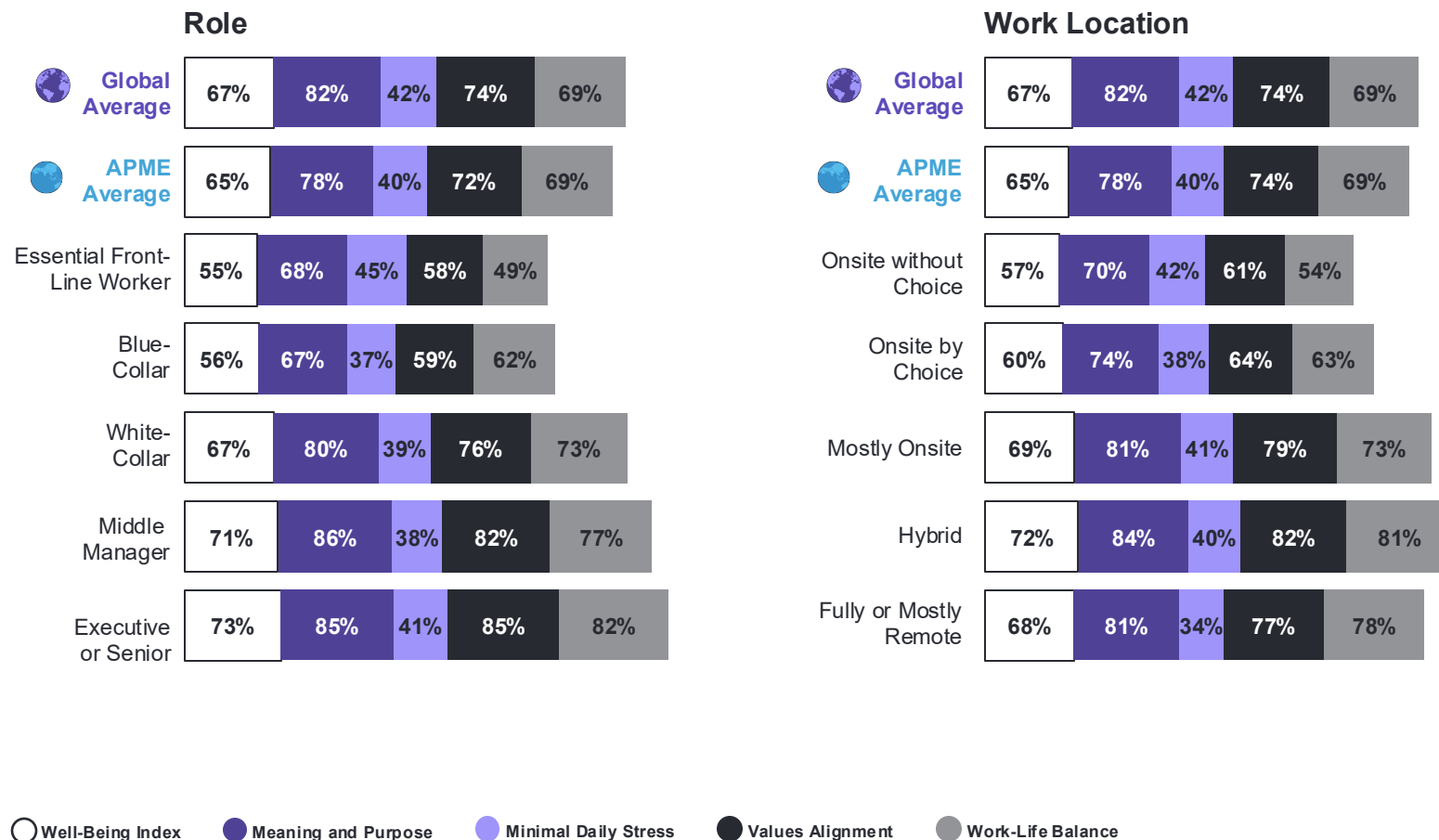


**Energy & Utilities and IT**  
workers were the most  
likely to report moderate  
to high daily levels of  
workplace stress.



# Role and Location Trends in APME

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



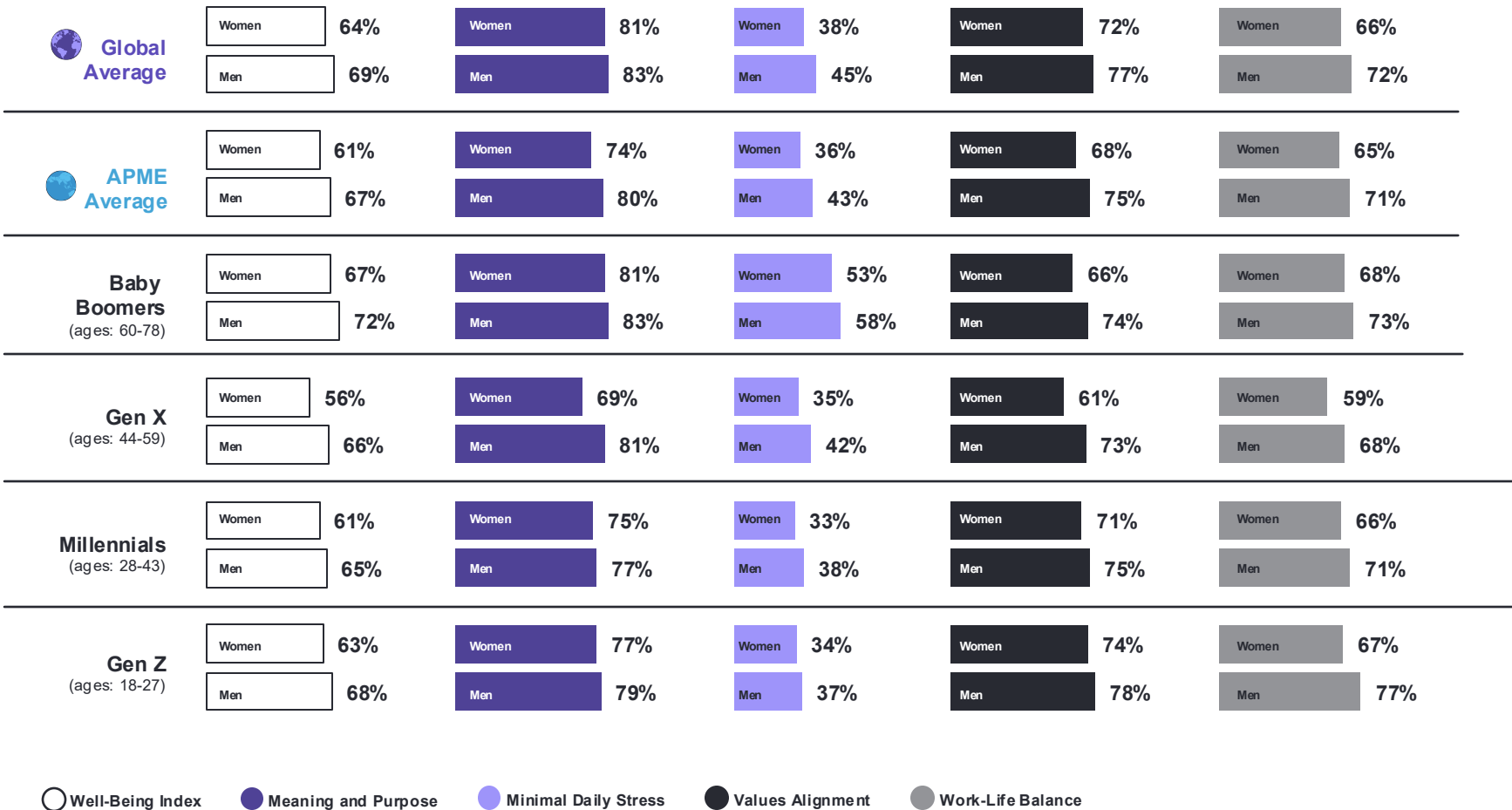
Essential front-line and blue-collar workers reported the lowest overall Well-Being across roles and locations.



Gap in values alignment between essential workers and executive and senior management was considerable.

# Age-Gender Dynamics in APME

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



Gen Z succeeded in demanding work-life support, but stress levels were stubbornly high.



The gender gap in work-life balance was the greatest between Gen Z 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](#).

# Less Job Satisfaction and Security, More Trust in Managers (APME)

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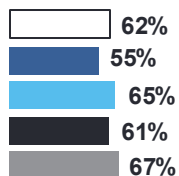


The Job Satisfaction Index an average of the above percentages. . . [Learn more about the Methodology.](#)

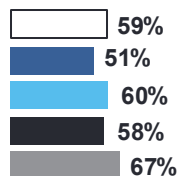
# Country-Level Perspectives in APME

Explore how job satisfaction differs across countries.

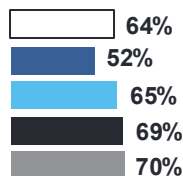
Global Average



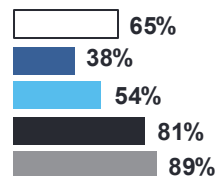
APME Average



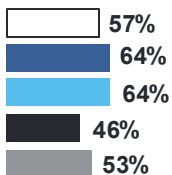
Australia



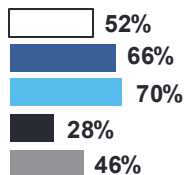
India



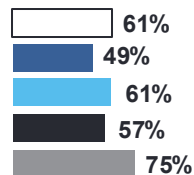
Israel



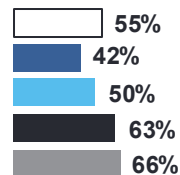
Japan



Malaysia



Singapore



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



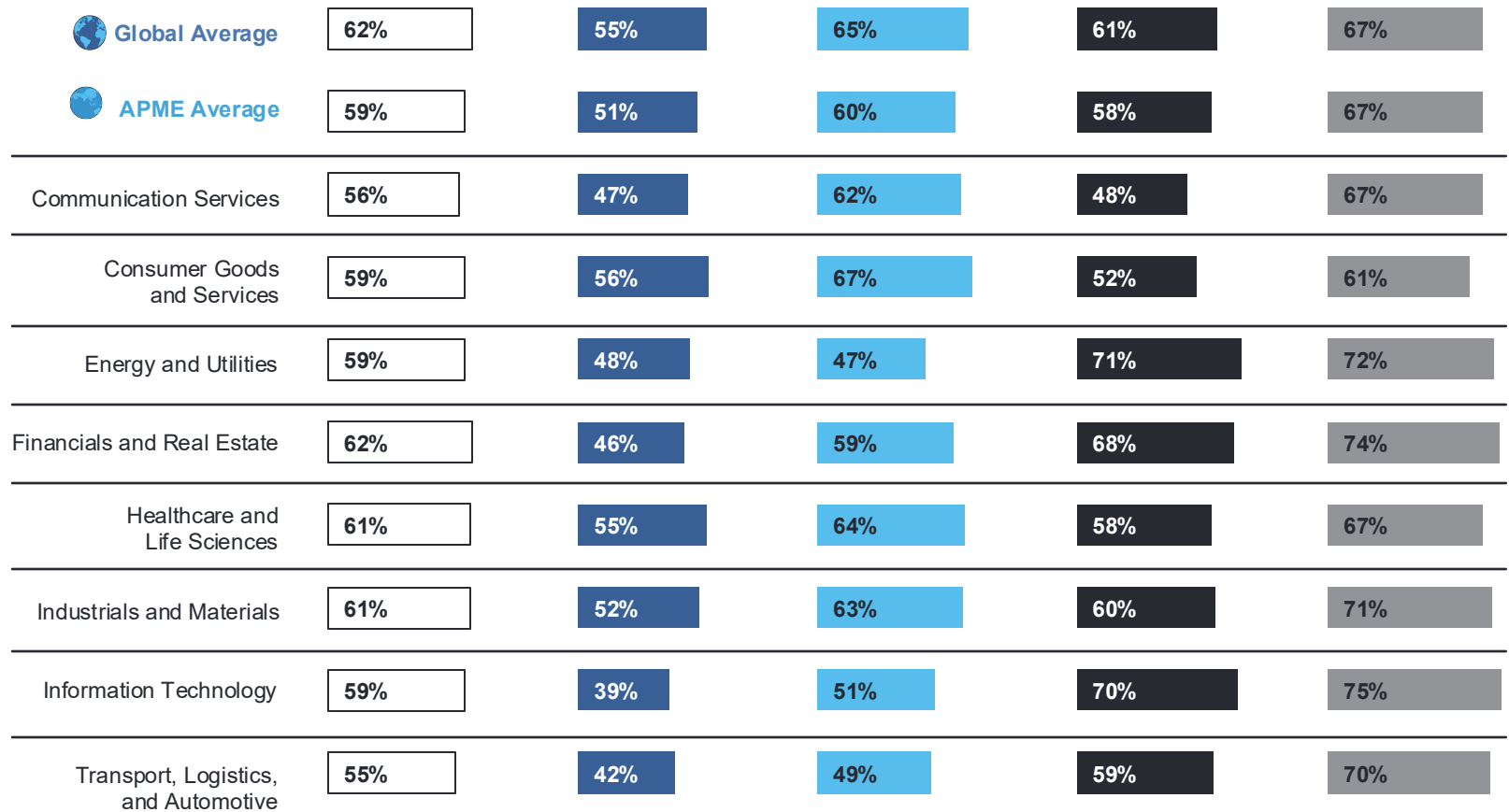
While India topped the charts for most aspects of work, they ranked the lowest for job security and satisfaction, along with Singapore.



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 in APME

Examine sector-specific trends in worker job satisfaction.



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



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

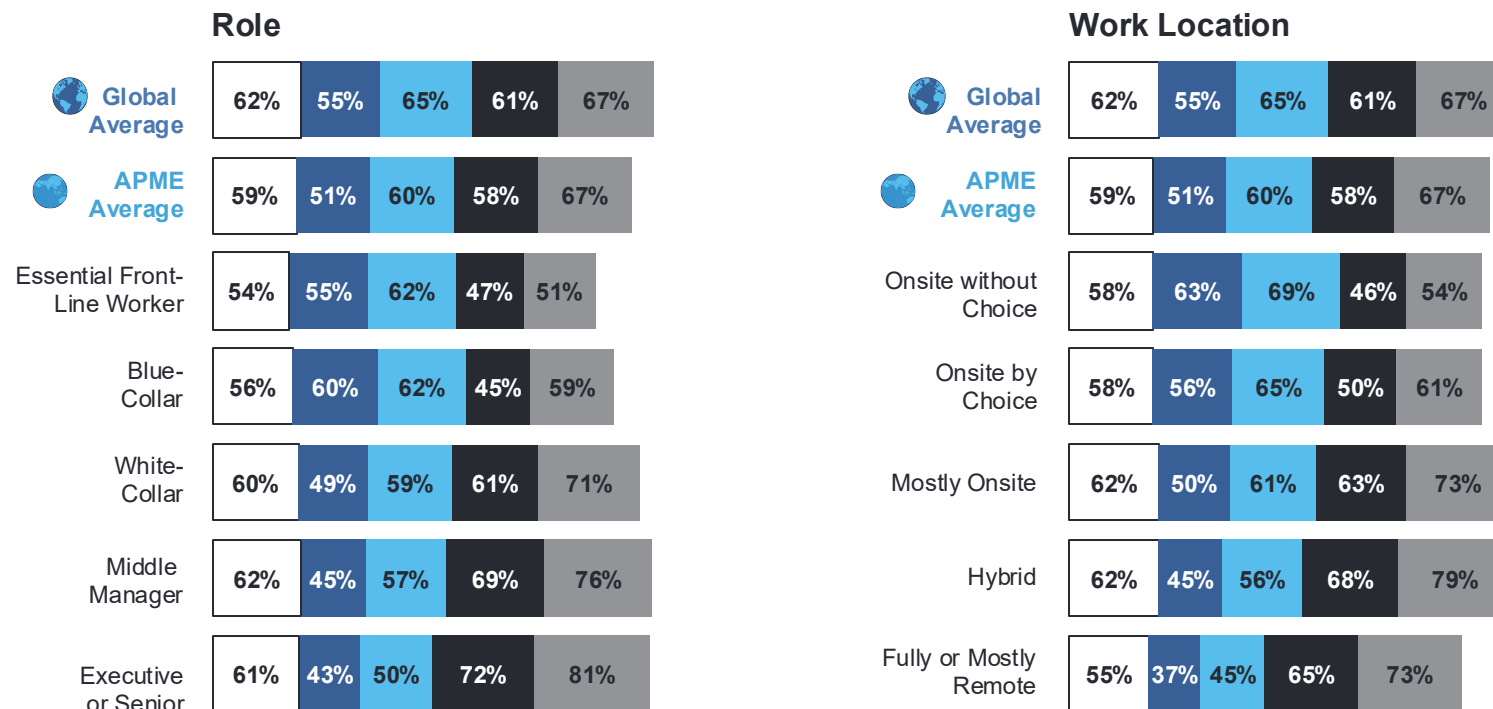


Managers were reportedly the least trustworthy in Consumer Goods and Services.



# Role and Location Trends in APME

Examine how job roles and working locations shape employee satisfaction.



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



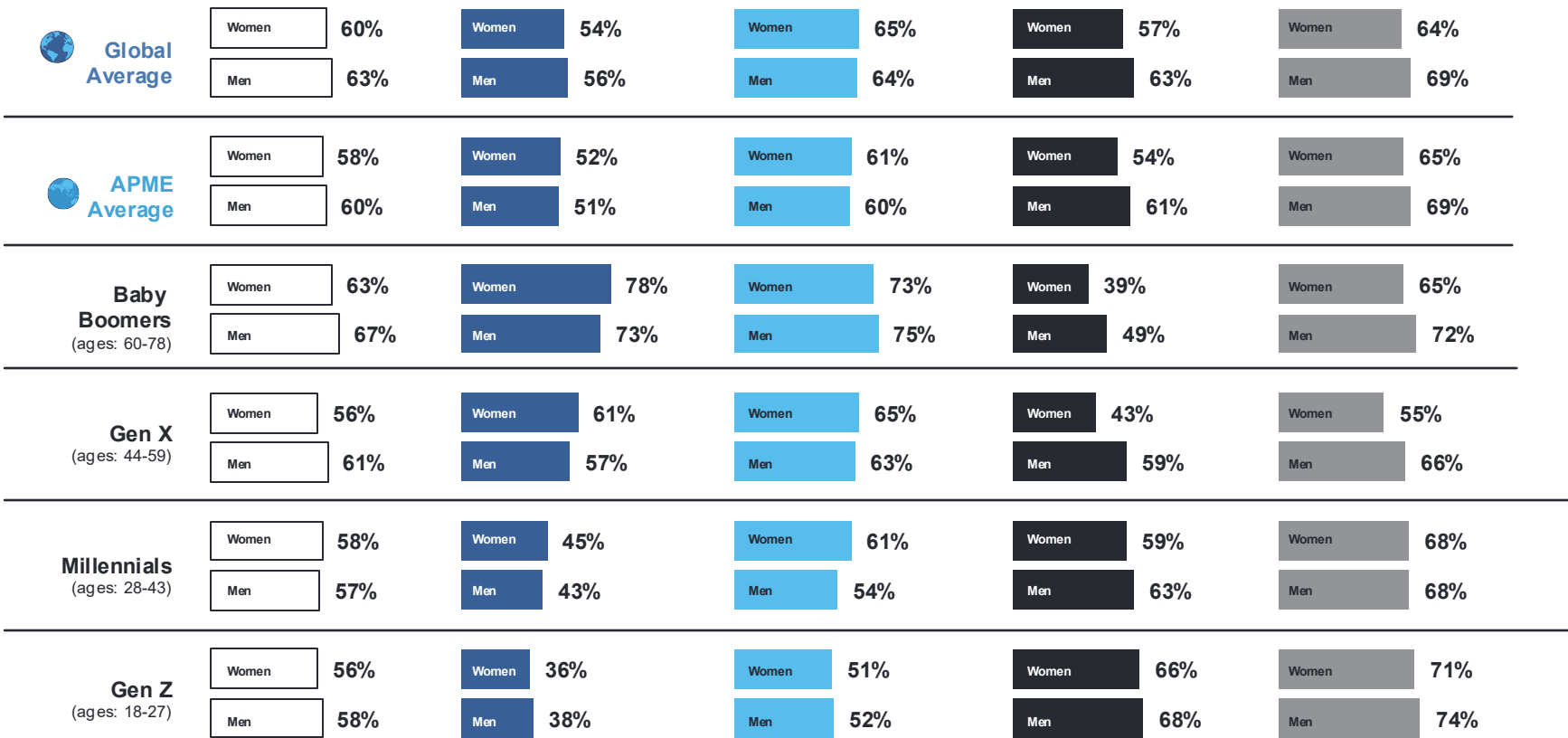
**Blue-collar and essential frontline workers felt the most secure in their jobs, while executive or senior-level roles were the least secure.**



**Workers who are onsite were more likely to be satisfied with their jobs compared to workers who are fully or mostly remote.**

# Age-Gender Dynamics in APME

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.



Gen X reported the greatest gender discrepancy in job-search confidence.



# 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](#).



# Rising Confidence and Career Growth (APME)

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.

**73%**



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

**62%**



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

**84%**



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

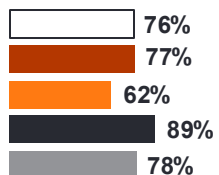
**75%**

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

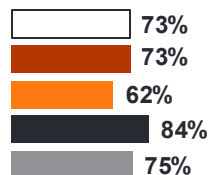
# Country-Level Perspectives

Examine how worker confidence is experienced around the globe.

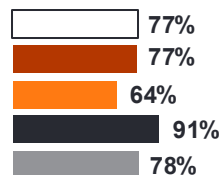
## Global Average



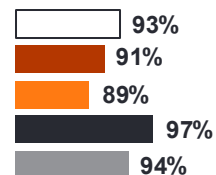
## APME Average



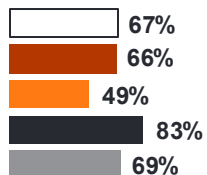
## Australia



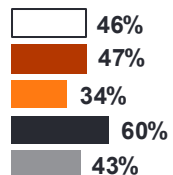
## India



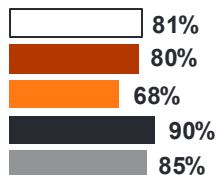
## Israel



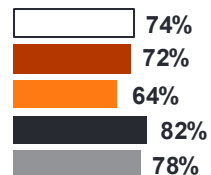
## Japan



## Malaysia



## Singapore



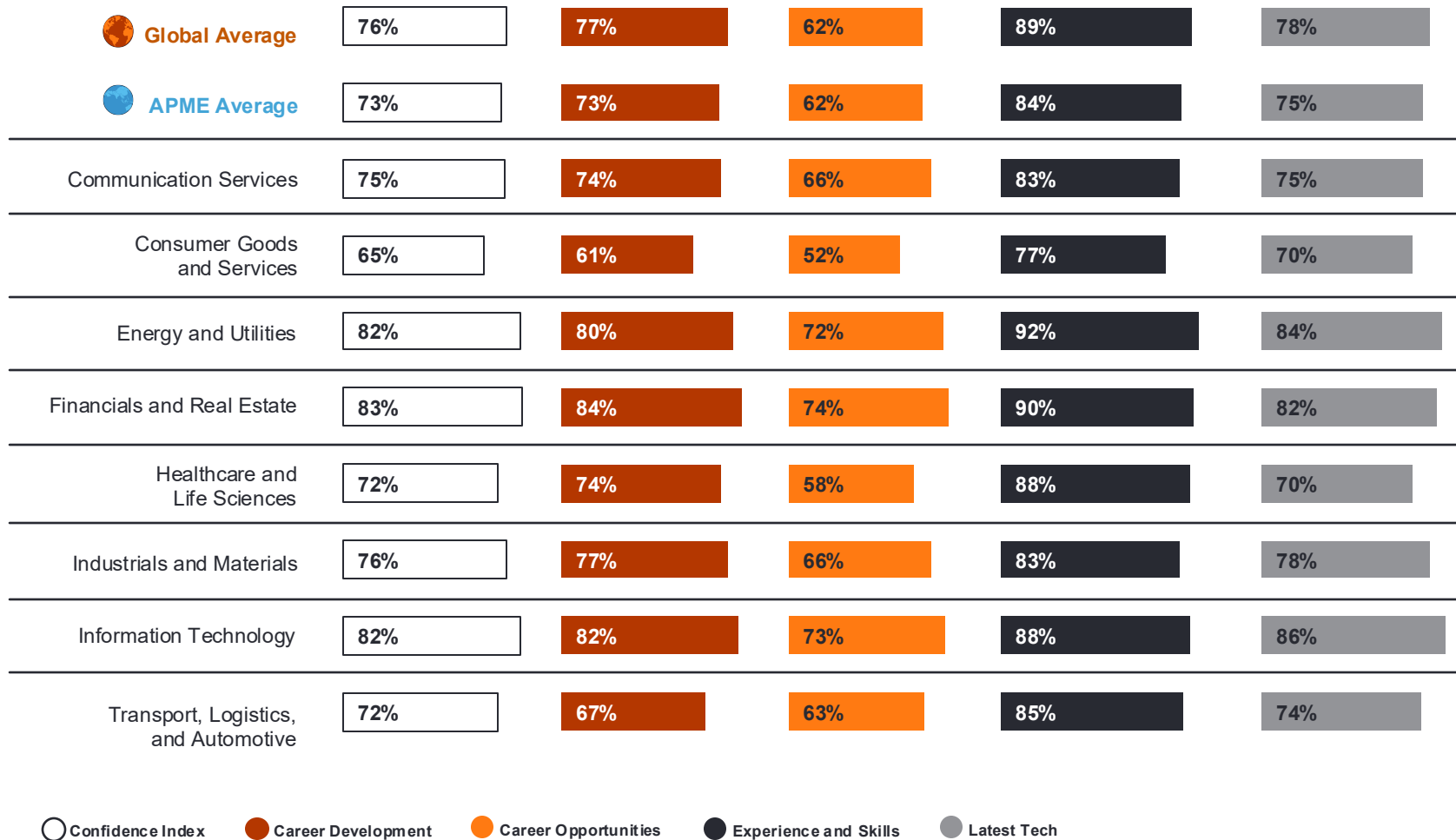
India reported the best overall workforce confidence, with strong worker sentiment the strongest across all four benchmarks.



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

# Industry Insights in APME

Understand how sector-specific factors influence worker confidence.



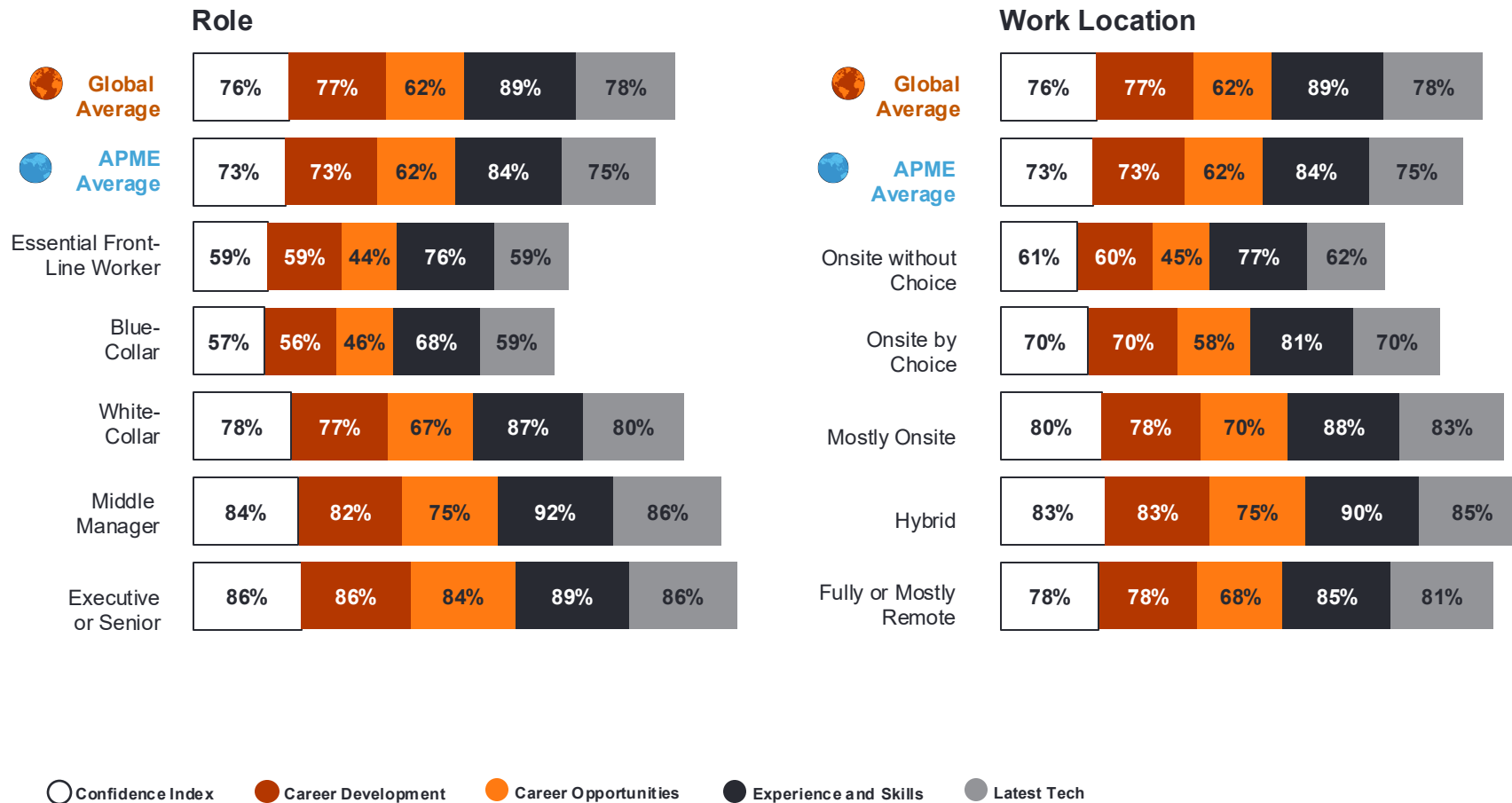
**Consumer Goods and Services reported the lowest confidence, especially when it comes to career development and opportunities.**



**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 in APME

Analyze how different roles and work settings influence employee confidence.



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

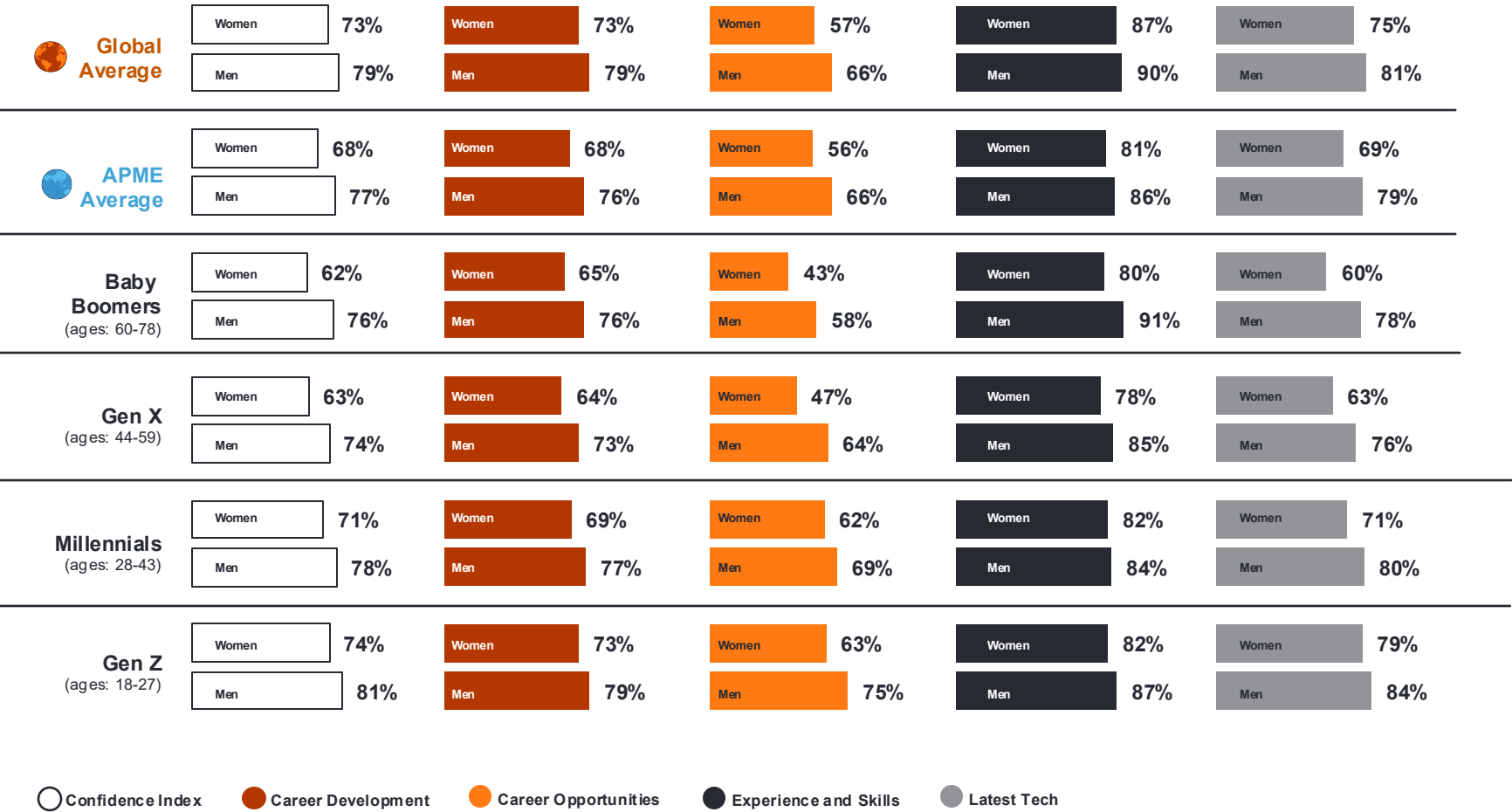


**Hybrid workers expressed the highest confidence in all areas: experience and skills, tech and tools, career development, and opportunities.**



# Age-Gender Dynamics in APME

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



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



Gen X reported the greatest gender discrepancy in career opportunities.



# Conclusion





# Opportunities for Employers



## Meaningful work can't outrun burnout.



**While workers in APME find purpose in their jobs, persistent daily stress — especially among Gen Z and blue-collar workers — 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 job satisfaction becomes a challenge in APME, **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 in APME narrowing the gap in career confidence compared to the global average.** 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 are "very confident" or "confident" in using the latest technology available in their industry, based on a 10-point scale.
- **Confidence Index:**  
The Confidence Index is an average of the above percentages.



# ManpowerGroup Solutions Across the Entire HR Lifecycle



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