

# Accommodation, Food, and Leisure

## Human-machine frontier

### Human-machine frontier

% of tasks completed by predominantly people, predominantly technology, or a combination of both

Human Global Combination Global Technology Global

#### ALL TASKS

Now



2030



## Key barriers for business transformation

### Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Industry Global

Skills gaps in the labour market



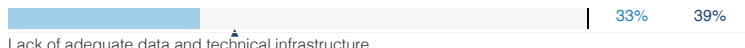
Inability to attract talent to the industry



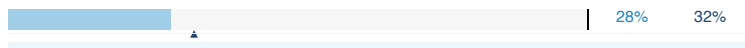
Organization culture and resistance to change



Outdated or inflexible regulatory framework



Lack of adequate data and technical infrastructure



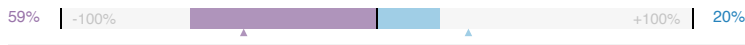
## Talent availability outlook

### Talent trend

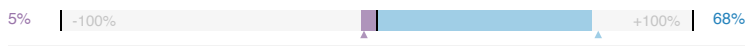
Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



## Business Practice

### Business practices to improve talent availability

Top practices with the greatest potential to improve talent availability (share of organizations surveyed)

Industry Global

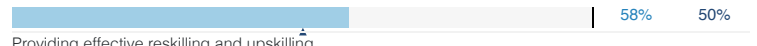
Supporting employee health and well-being



Improving talent progression and promotion processes



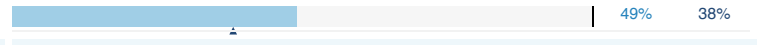
Offering higher wages



Providing effective reskilling and upskilling



Improving working hours and overtime policies



## Wage outlook

### Wage trends

Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues

Growing Global Similar Global Declining Global



## DEI Actions

Share of employers surveyed planning to implement the diversity, equity and inclusion measure

52 | Global 51

Run comprehensive DEI training for managers and staff

48 | Global 42

Set DEI goals, targets or quotas

46 | Global 48

Targeted recruitment, retention and progression initiatives

## AI Strategy

Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence

67 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

56 | Global 69

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

51 | Global 62

Hiring new people with skills to better work alongside AI

# Advanced Manufacturing

**50%** | Global 22%**Labour-market churn**

Five-year structural labour-force churn

**37%** | Global 39%**Skill disruption**

Shares of core skills which will change

**78%** | Global 83%**Organizations with DEI priorities**

Share of organizations with DEI priorities

**86%** | Global 88%**AI exposure**

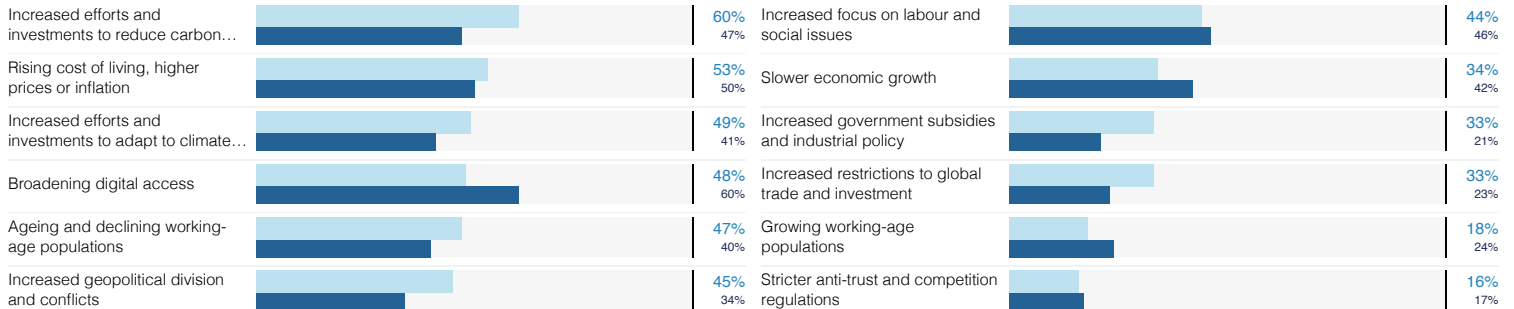
Share of organizations running AI programmes

## Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

■ Industry ■ Global

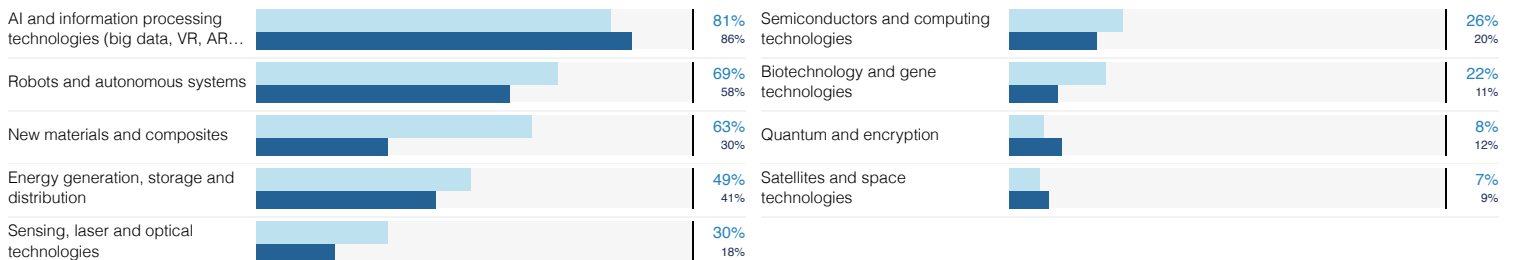


## Technology trends

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

■ Industry ■ Global



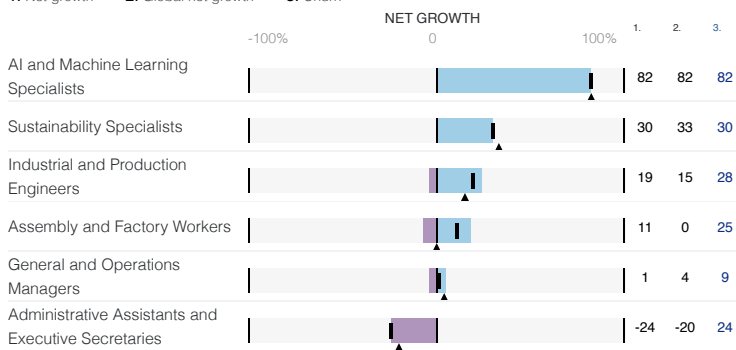
## Jobs outlook

### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth ■ Job Growth ■ Job displacement ■ Net Growth ▲ Global net growth

1. Net growth 2. Global net growth 3. Churn

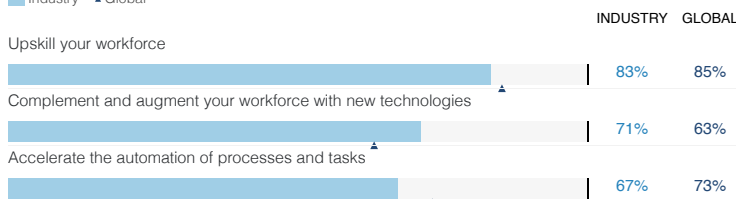


## Workforce Strategy outlook

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global



## Skill outlook

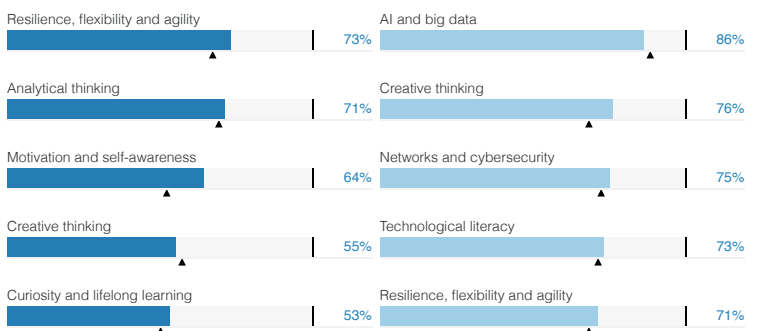
### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030



## Upskilling and reskilling outlook

**46** | Global 41

Would not need training by 2030

**29** | Global 29

Would be upskilled in their current role

**15** | Global 19

Would be upskilled and redeployed

**9** | Global 11

Would be unlikely to upskill

# Advanced Manufacturing

## Human-machine frontier

### Human-machine frontier

% of tasks completed by predominantly people, predominantly technology, or a combination of both

Human Global Combination Global Technology Global

#### ALL TASKS

Now



2030

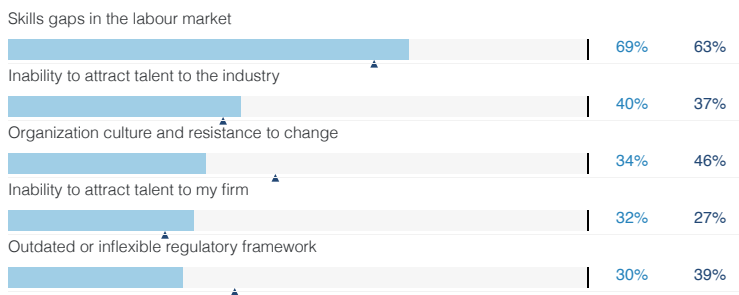


## Key barriers for business transformation

### Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Industry Global

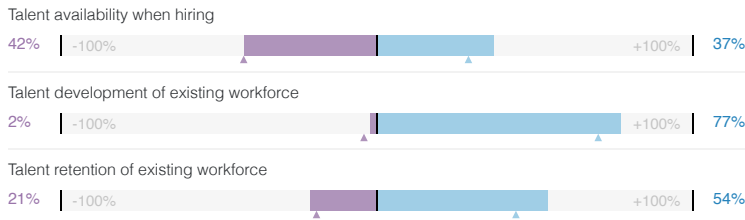


## Talent availability outlook

### Talent trend

Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

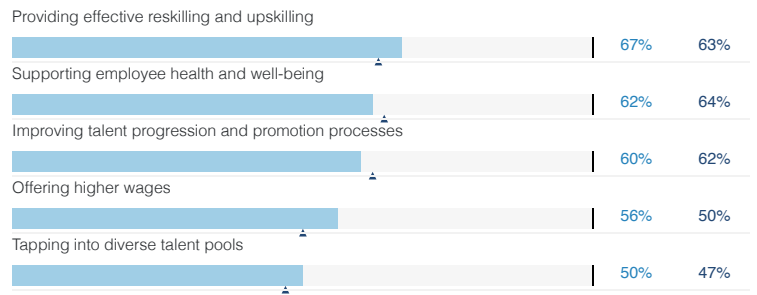


## Business Practice

### Business practices to improve talent availability

Top practices with the greatest potential to improve talent availability (share of organizations surveyed)

Industry Global



## Wage outlook

### Wage trends

Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues

Growing Global Similar Global Declining Global



## DEI Actions

Share of employers surveyed planning to implement the diversity, equity and inclusion measure

57 | Global 51

Run comprehensive DEI training for managers and staff

49 | Global 39

Pay equity reviews and salary audits

47 | Global 48

Targeted recruitment, retention and progression initiatives

## AI Strategy

Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence

80 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

72 | Global 69

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

58 | Global 62

Hiring new people with skills to better work alongside AI

# Agriculture Forestry and Fishing

**24%** | Global 22%**Labour-market churn**

Five-year structural labour-force churn

**41%** | Global 39%**Skill disruption**

Shares of core skills which will change

**67%** | Global 83%**Organizations with DEI priorities**

Share of organizations with DEI priorities

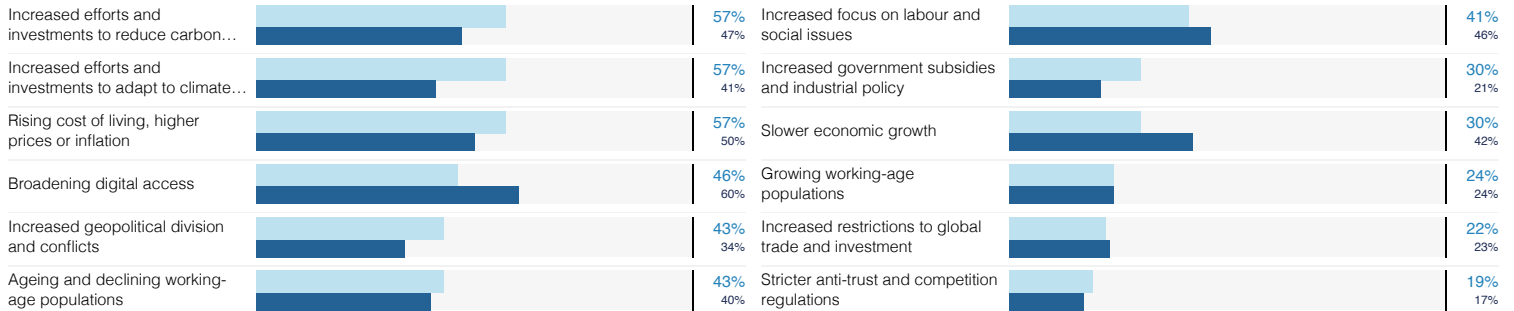
**83%** | Global 88%**AI exposure**

Share of organizations running AI programmes

**Trend outlook****Macrotrends driving business transformation**

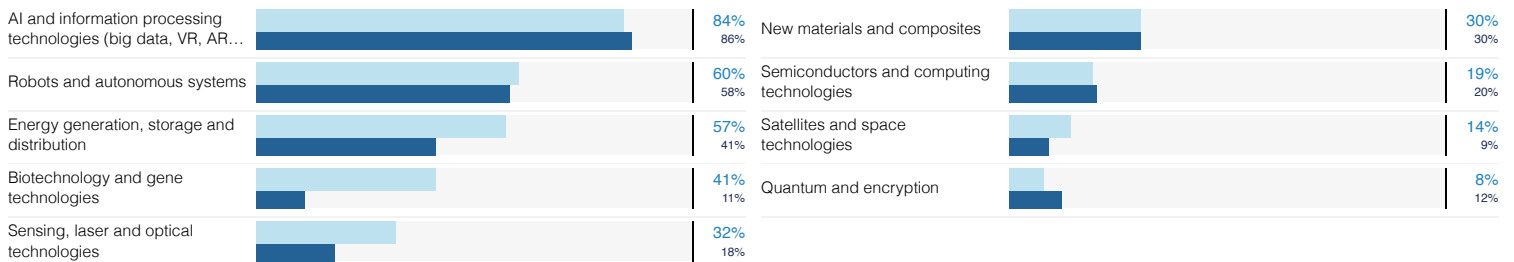
Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

■ Industry ■ Global

**Technology trends****Technology trends driving business transformation**

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

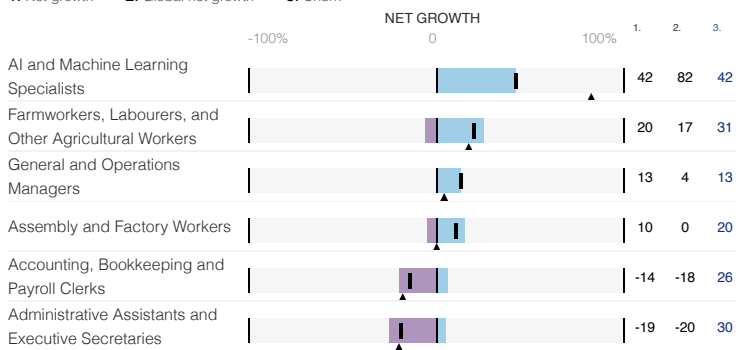
■ Industry ■ Global

**Jobs outlook****Key roles for business transformation**

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

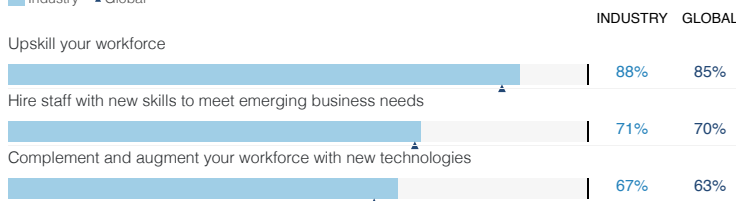
Net growth ■ Job Growth ■ Job displacement ■ Net Growth ▲ Global net growth

1. Net growth 2. Global net growth 3. Churn

**Workforce Strategy outlook****Key components of your workforce strategy by 2030**

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

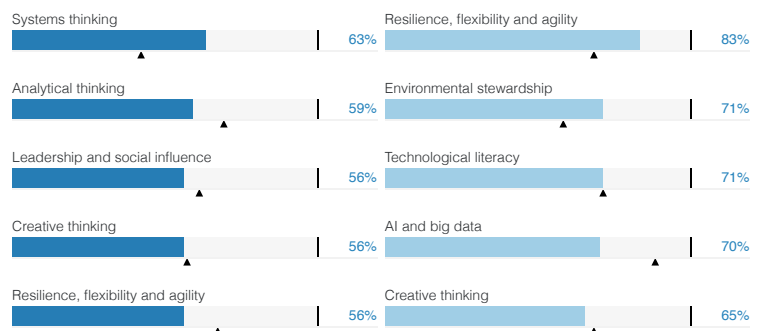
**Skill outlook****Skills of increasing use by 2030**

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030

**Upskilling and reskilling outlook****54** | Global 41

Would not need training by 2030

**21** | Global 29

Would be upskilled in their current role

**16** | Global 19

Would be upskilled and redeployed

**10** | Global 11

Would be unlikely to upskill

# Agriculture Forestry and Fishing

## Human-machine frontier

### Human-machine frontier

% of tasks completed by predominantly people, predominantly technology, or a combination of both

Human Global Combination Global Technology Global

#### ALL TASKS

Now



2030

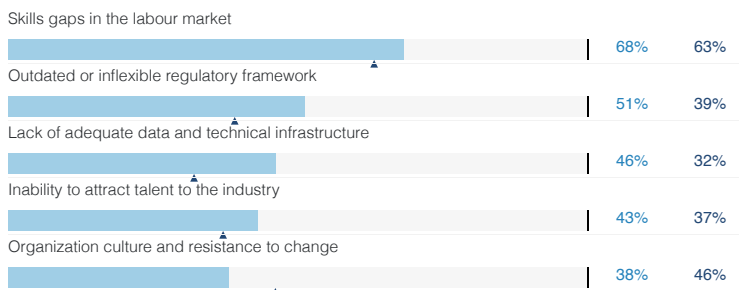


## Key barriers for business transformation

### Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Industry Global

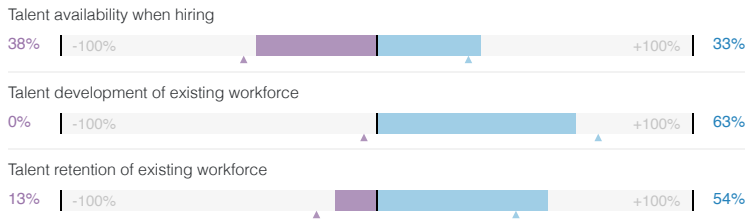


## Talent availability outlook

### Talent trend

Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

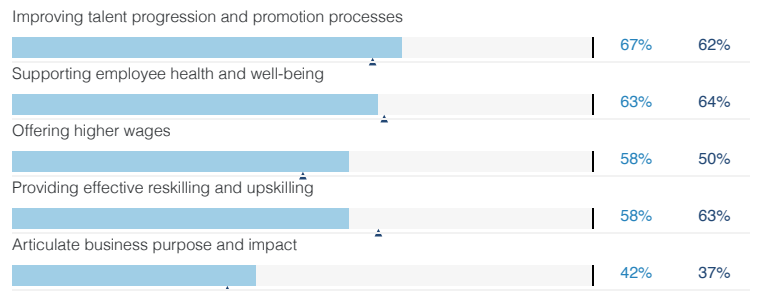


## Business Practice

### Business practices to improve talent availability

Top practices with the greatest potential to improve talent availability (share of organizations surveyed)

Industry Global



## Wage outlook

### Wage trends

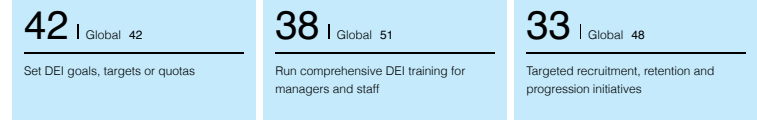
Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues

Growing Global Similar Global Declining Global



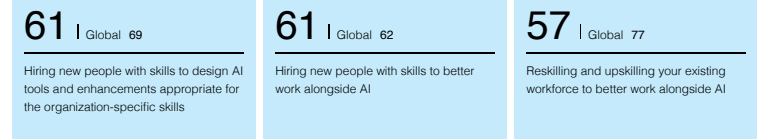
## DEI Actions

Share of employers surveyed planning to implement the diversity, equity and inclusion measure



## AI Strategy

Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence



# Automotive and Aerospace

**17%** | Global 22%

**Labour-market churn**

Five-year structural labour-force churn

**38%** | Global 39%

**Skill disruption**

Shares of core skills which will change

**87%** | Global 83%

**Organizations with DEI priorities**

Share of organizations with DEI priorities

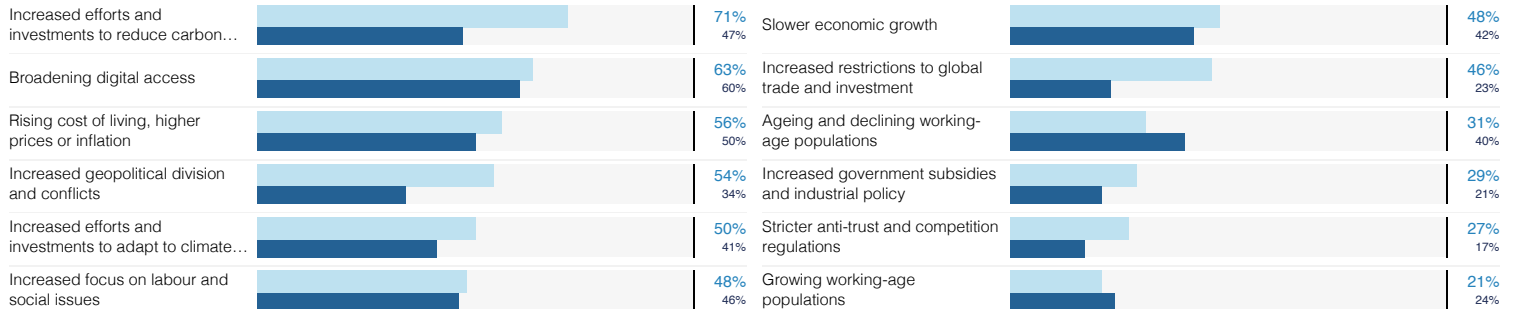
**83%** | Global 88%

**AI exposure**

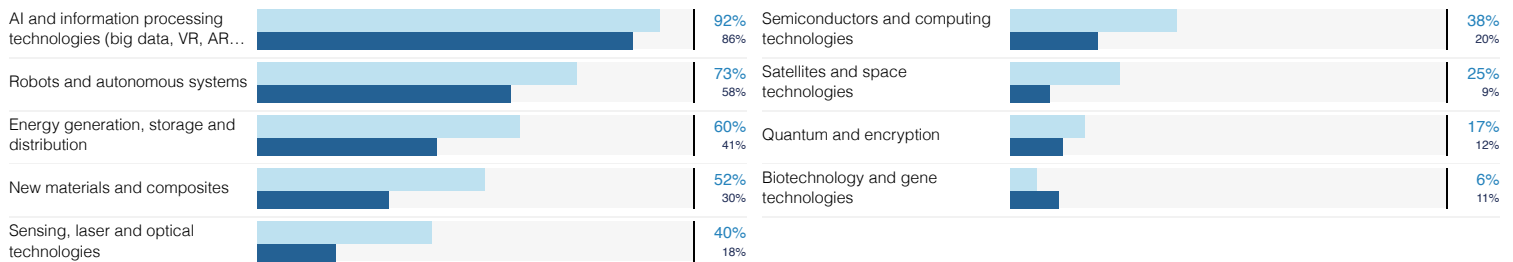
Share of organizations running AI programmes

**Trend outlook**
**Macrotrends driving business transformation**

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

■ Industry ■ Global

**Technology trends**
**Technology trends driving business transformation**

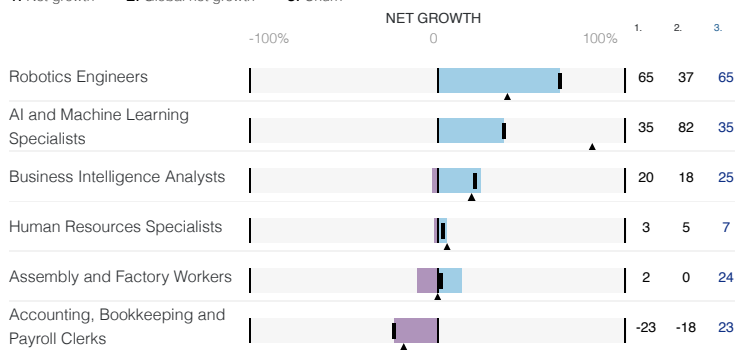
Share of organizations surveyed that identify the technology trend as likely to drive business transformation

■ Industry ■ Global

**Jobs outlook**
**Key roles for business transformation**

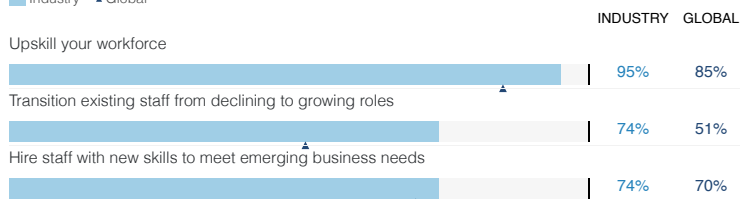
Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

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1. Net growth 2. Global net growth 3. Churn


**Workforce Strategy outlook**
**Key components of your workforce strategy by 2030**

% surveyed organizations selecting the macrotrend to drive workforce transformation

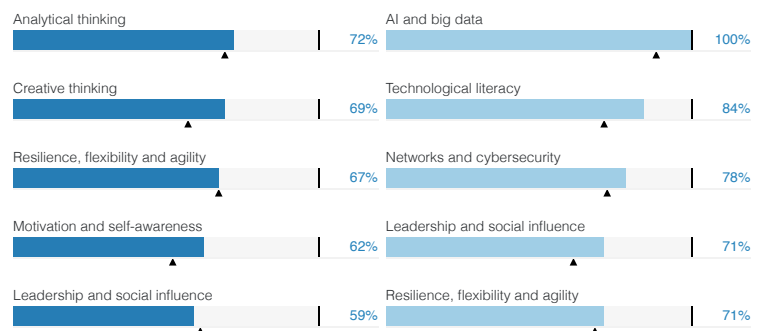
■ Industry ▲ Global

**Skill outlook**
**Skills of increasing use by 2030**

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030


**Upskilling and reskilling outlook**
**43** | Global 41

Would not need training by 2030

**27** | Global 29

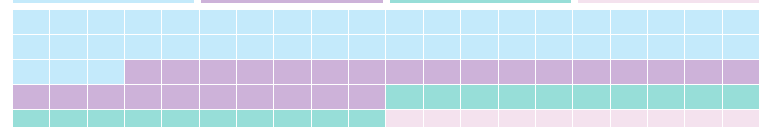
Would be upskilled in their current role

**20** | Global 19

Would be upskilled and redeployed

**11** | Global 11

Would be unlikely to upskill



# Automotive and Aerospace

## Human-machine frontier

### Human-machine frontier

% of tasks completed by predominantly people, predominantly technology, or a combination of both

Human Global Combination Global Technology Global

#### ALL TASKS

Now



2030

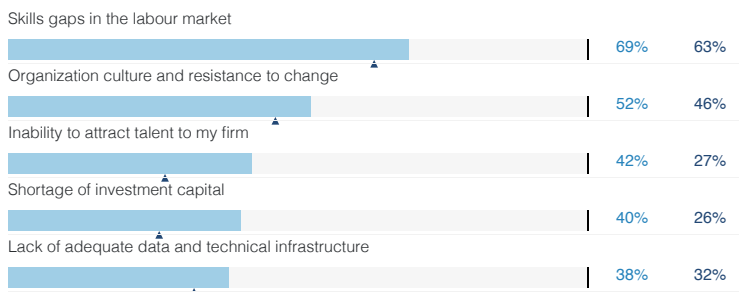


## Key barriers for business transformation

### Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Industry Global

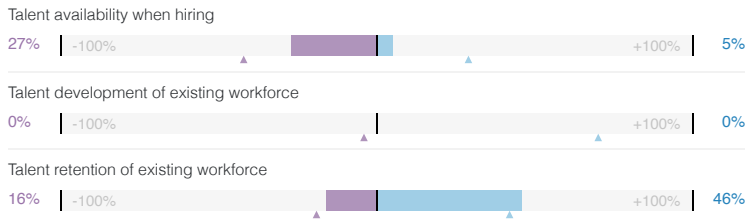


## Talent availability outlook

### Talent trend

Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

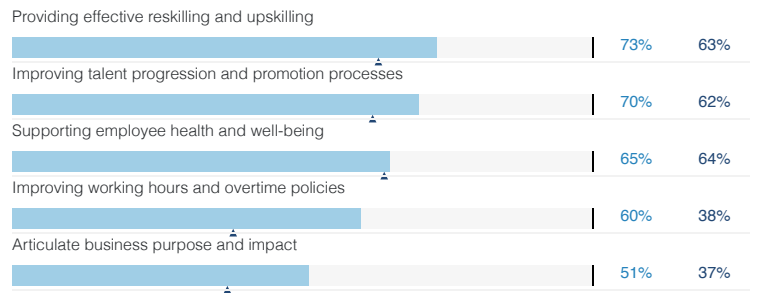


## Business Practice

### Business practices to improve talent availability

Top practices with the greatest potential to improve talent availability (share of organizations surveyed)

Industry Global



## Wage outlook

### Wage trends

Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues

Growing Global Similar Global Declining Global



## DEI Actions

Share of employers surveyed planning to implement the diversity, equity and inclusion measure

65 | Global 48

Targeted recruitment, retention and progression initiatives

54 | Global 51

Run comprehensive DEI training for managers and staff

46 | Global 39

Pay equity reviews and salary audits

## AI Strategy

Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence

86 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

74 | Global 69

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

71 | Global 62

Hiring new people with skills to better work alongside AI

# Chemical and Advanced materials

**19%** | Global 22%

**Labour-market churn**

Five-year structural labour-force churn

**42%** | Global 39%

**Skill disruption**

Shares of core skills which will change

**91%** | Global 83%

**Organizations with DEI priorities**

Share of organizations with DEI priorities

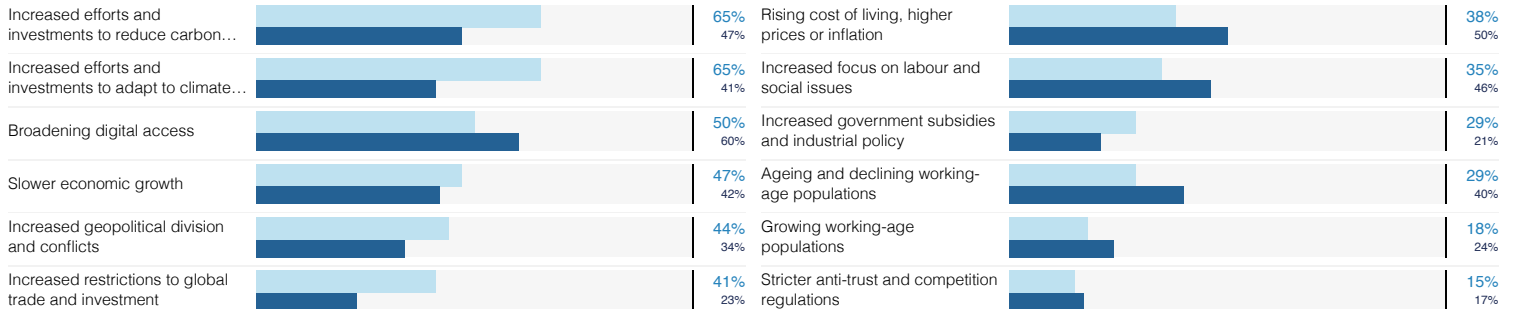
**83%** | Global 88%

**AI exposure**

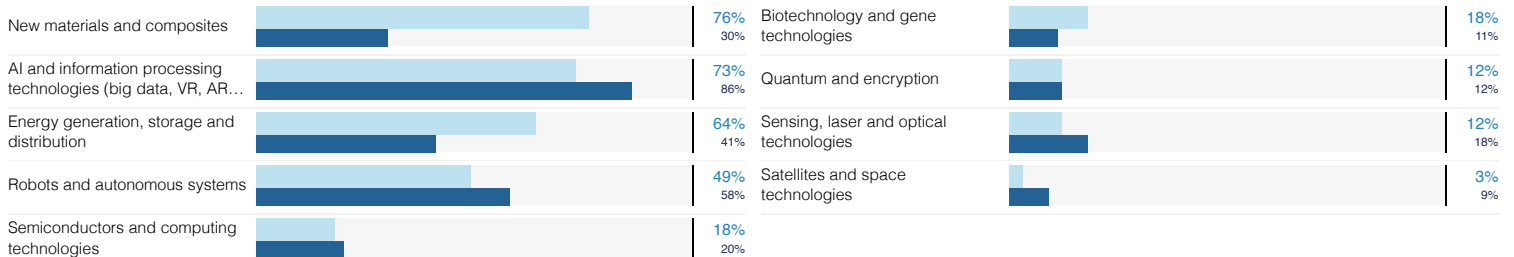
Share of organizations running AI programmes

**Trend outlook**
**Macrotrends driving business transformation**

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

■ Industry ■ Global

**Technology trends**
**Technology trends driving business transformation**

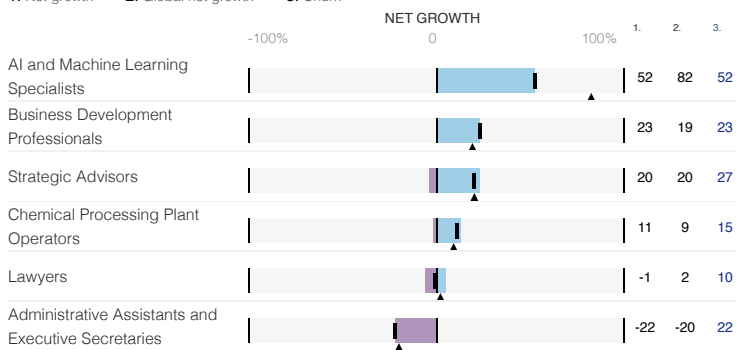
Share of organizations surveyed that identify the technology trend as likely to drive business transformation

■ Industry ■ Global

**Jobs outlook**
**Key roles for business transformation**

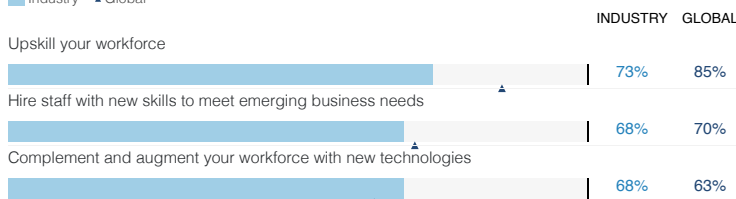
Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

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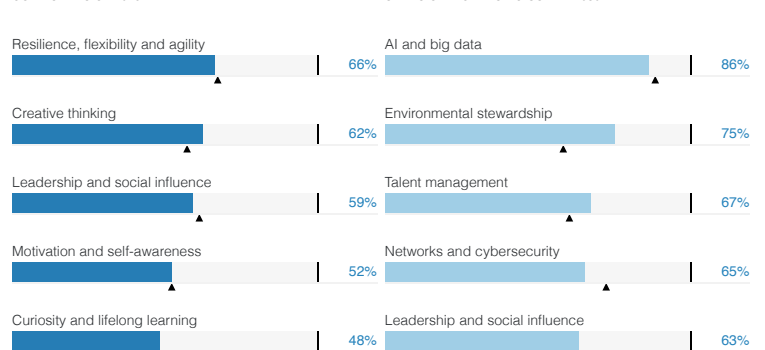
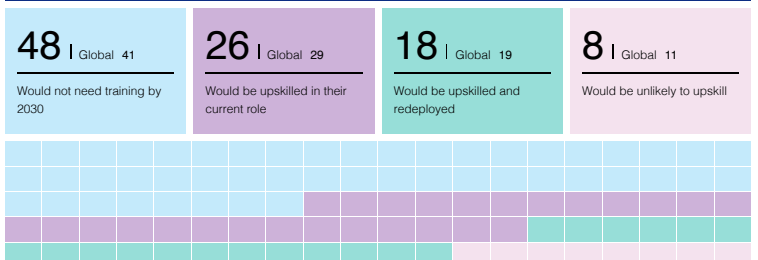

**Workforce Strategy outlook**
**Key components of your workforce strategy by 2030**

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

**Skill outlook**
**Skills of increasing use by 2030**

Skills of the most increase in use by 2030

■ Industry ▲ Global

**CORE SKILLS OF 2025**
**SKILLS OF INCREASING USE BY 2030**

**Upskilling and reskilling outlook**




# Chemical and Advanced materials

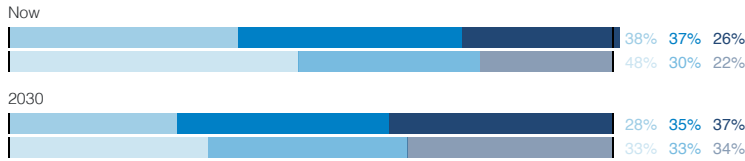
## Human-machine frontier

### Human-machine frontier

% of tasks completed by predominantly people, predominantly technology, or a combination of both

Human Global Combination Global Technology Global

#### ALL TASKS

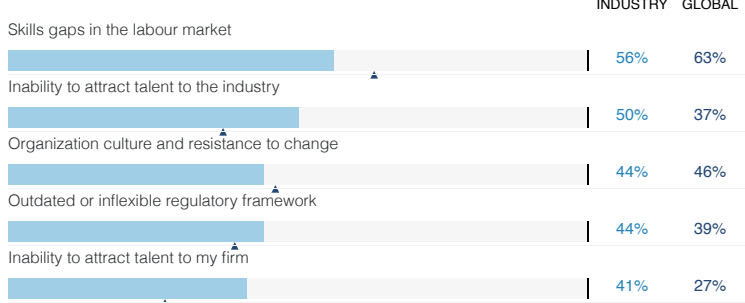


## Key barriers for business transformation

### Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Industry Global

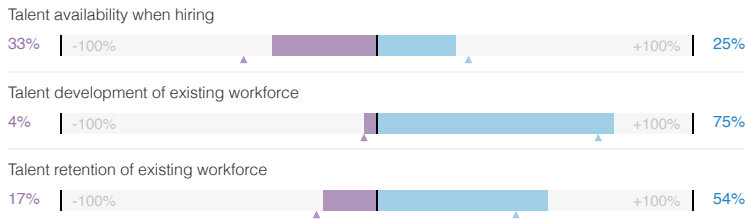


## Talent availability outlook

### Talent trend

Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

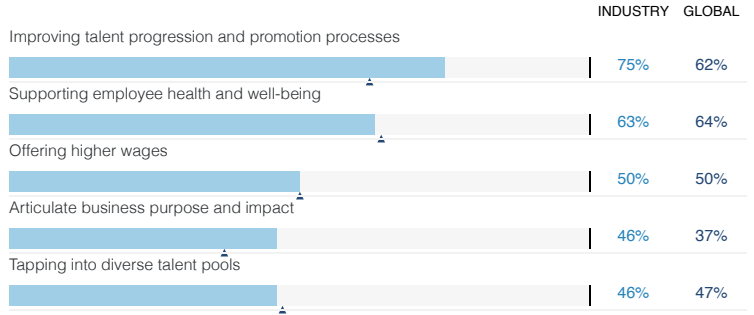


## Business Practice

### Business practices to improve talent availability

Top practices with the greatest potential to improve talent availability (share of organizations surveyed)

Industry Global



## Wage outlook

### Wage trends

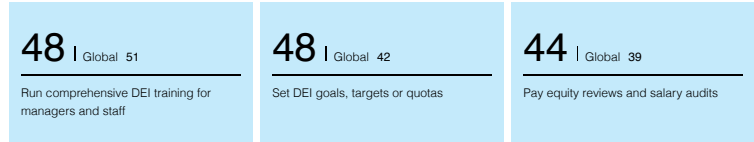
Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues

Growing Global Similar Global Declining Global



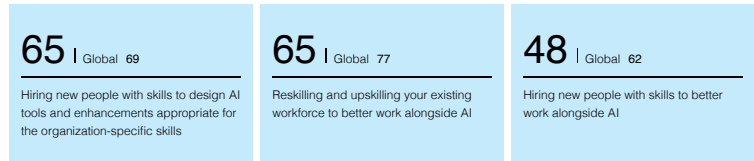
## DEI Actions

Share of employers surveyed planning to implement the diversity, equity and inclusion measure



## AI Strategy

Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence



# Education and Training

**22%** | Global 22%**Labour-market churn**

Five-year structural labour-force churn

**44%** | Global 39%**Skill disruption**

Shares of core skills which will change

**91%** | Global 83%**Organizations with DEI priorities**

Share of organizations with DEI priorities

**93%** | Global 88%**AI exposure**

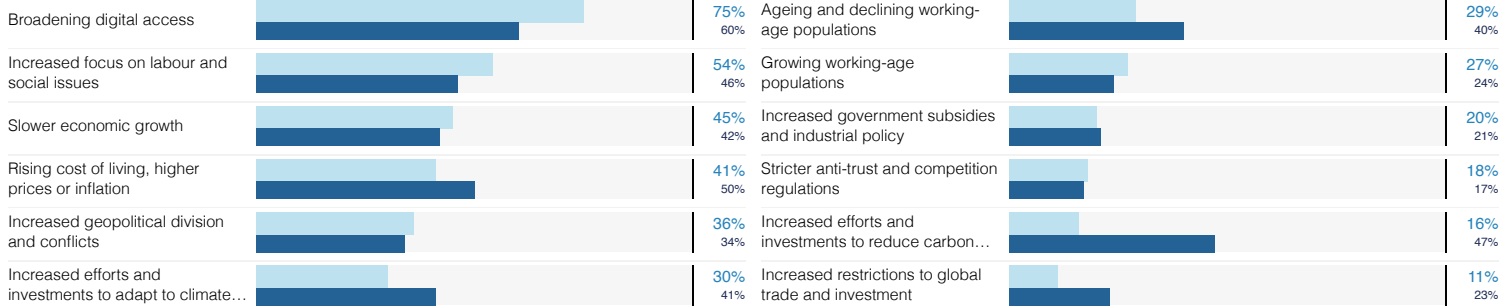
Share of organizations running AI programmes

## Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

■ Industry ■ Global

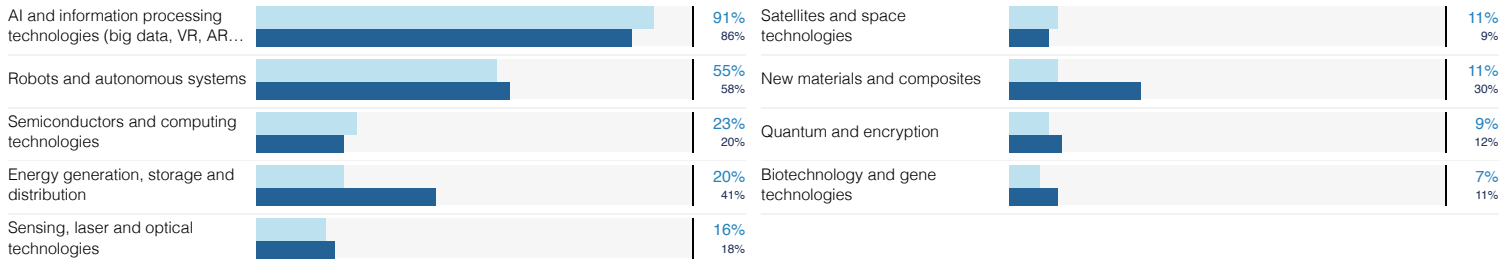


## Technology trends

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

■ Industry ■ Global



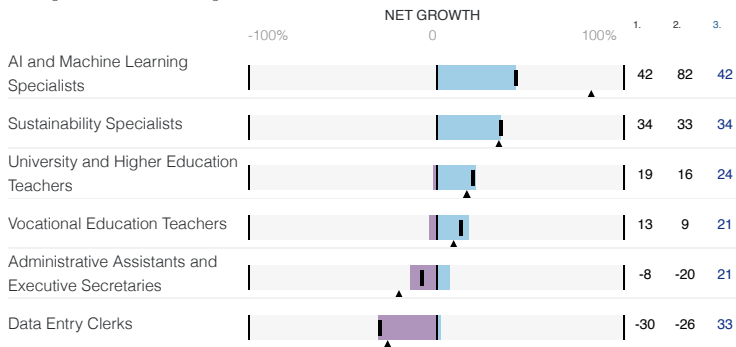
## Jobs outlook

### Key roles for business transformation

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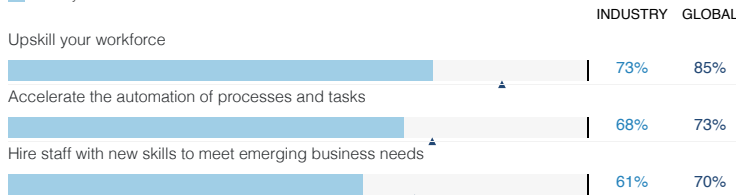


## Workforce Strategy outlook

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global



## Skill outlook

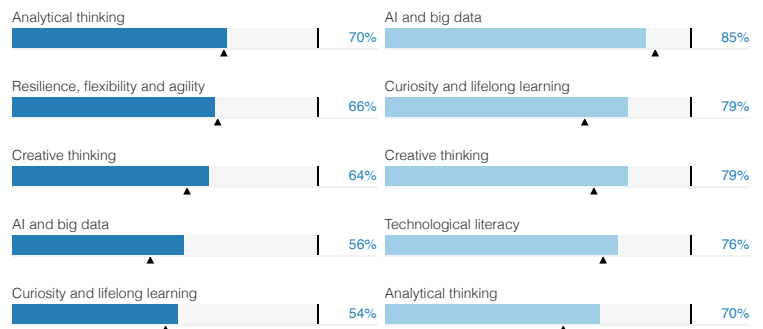
### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030



## Upskilling and reskilling outlook

**42** | Global 41

Would not need training by 2030

**26** | Global 29

Would be upskilled in their current role

**18** | Global 19

Would be upskilled and redeployed

**13** | Global 11

Would be unlikely to upskill