

# Accommodation, Food, and Leisure

## Human-machine frontier

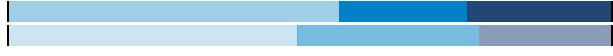
### Human-machine frontier

% 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

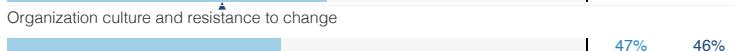
Industry ▲ Global

INDUSTRY GLOBAL

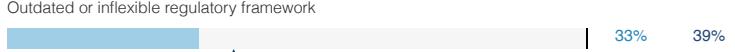
Skills gaps in the labour market



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Outdated or inflexible regulatory framework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



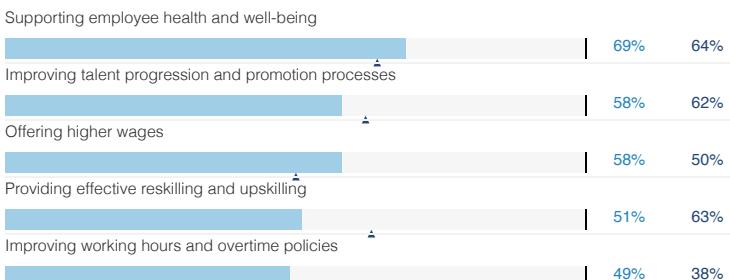
## Business Practice

### Business practices to improve talent availability

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

Industry ▲ Global

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

56% 38% 7%

52% 41% 7%



## 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**

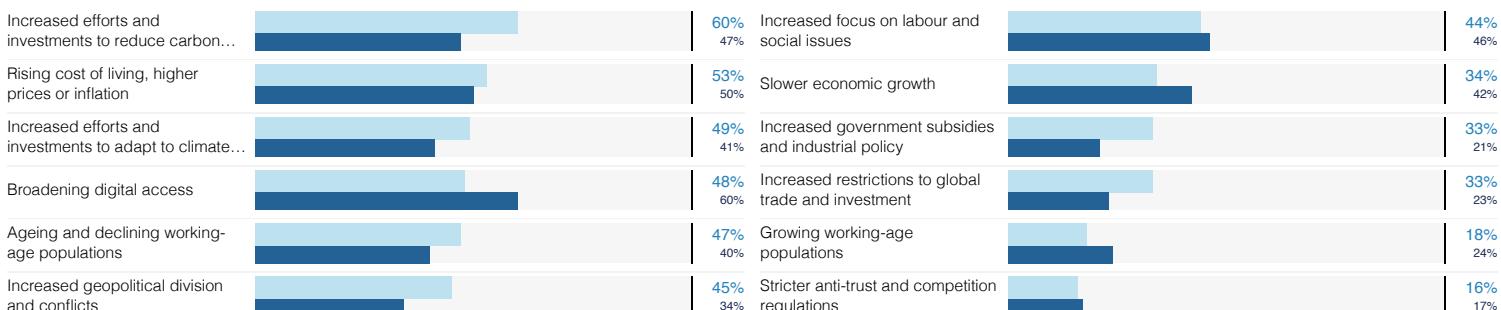
Share of organizations running AI programmes

## Trend outlook

### Macrotrends driving business transformation

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

■ Industry ■ Global

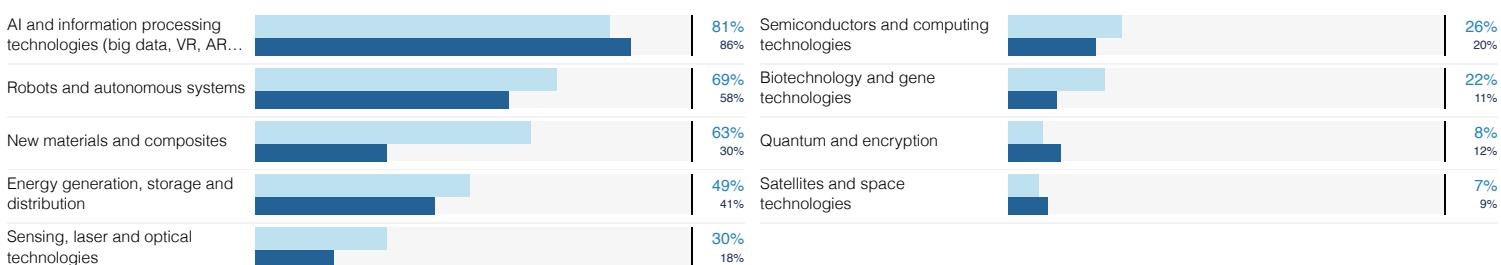


## Technology trends

### Technology trends driving business transformation

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

■ Industry ■ Global



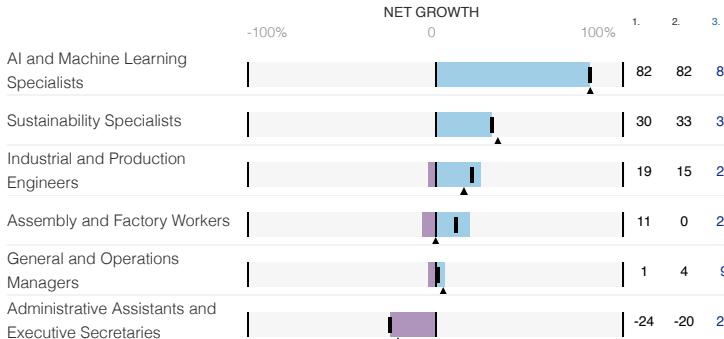
## Jobs outlook

### 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

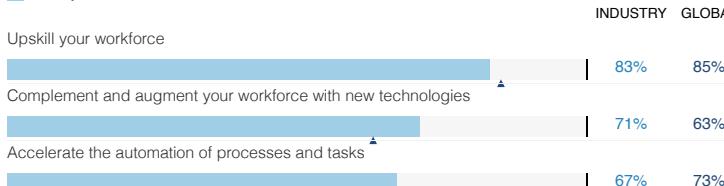


## Workforce Strategy outlook

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

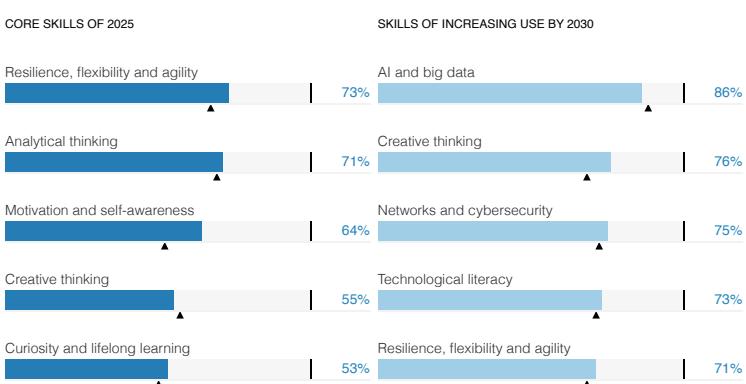


## Skill outlook

### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global



## Upskilling and reskilling outlook



# 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

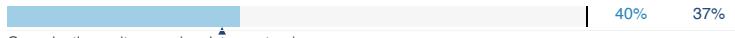
Industry ▲ Global

INDUSTRY GLOBAL

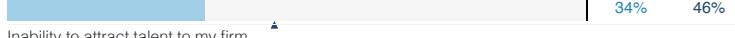
Skills gaps in the labour market



Inability to attract talent to the industry



Organization culture and resistance to change



Inability to attract talent to my firm



Outdated or inflexible regulatory framework



## 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

INDUSTRY GLOBAL

Providing effective reskilling and upskilling



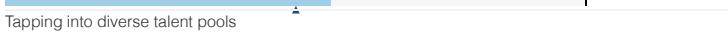
Supporting employee health and well-being



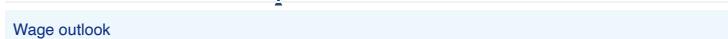
Improving talent progression and promotion processes



Offering higher wages



Tapping into diverse talent pools



## 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

Growing 38% 6% □ Global 41% 7%

## DEI Actions

### 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**

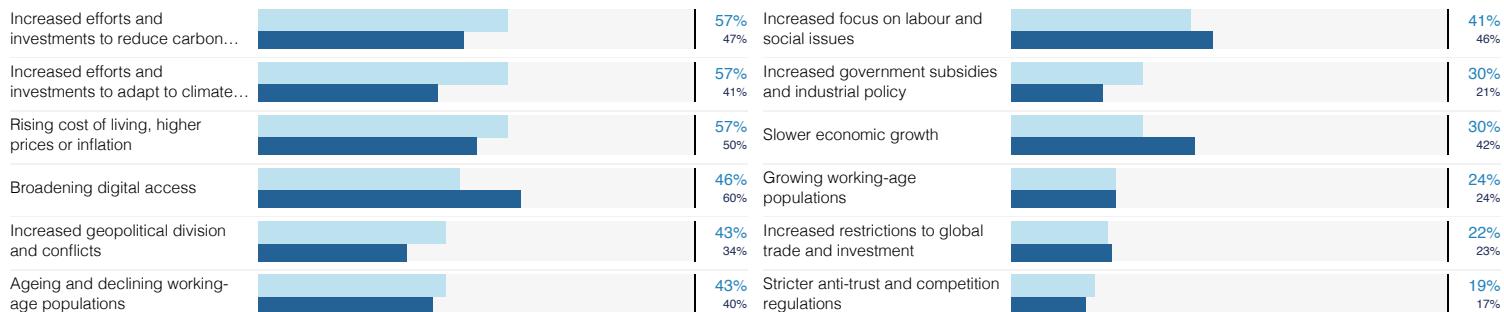
Share of organizations running AI programmes

## Trend outlook

### Macrotrends driving business transformation

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

■ Industry ■ Global

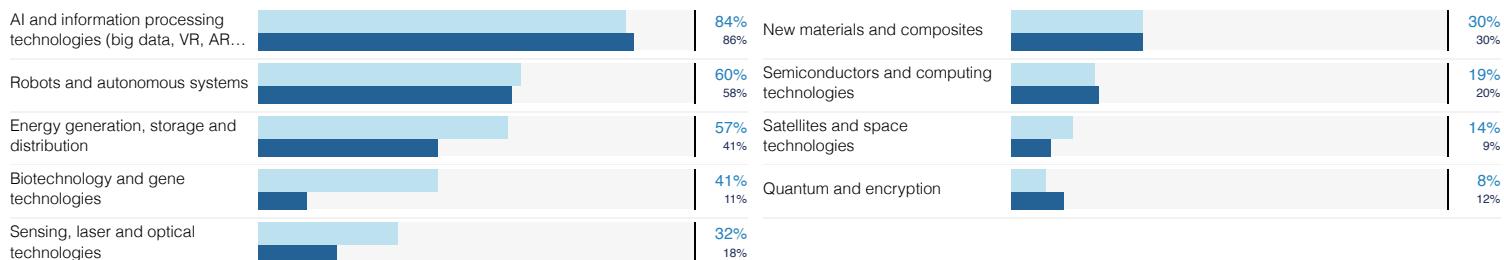


## Technology trends

### Technology trends driving business transformation

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

■ Industry ■ Global



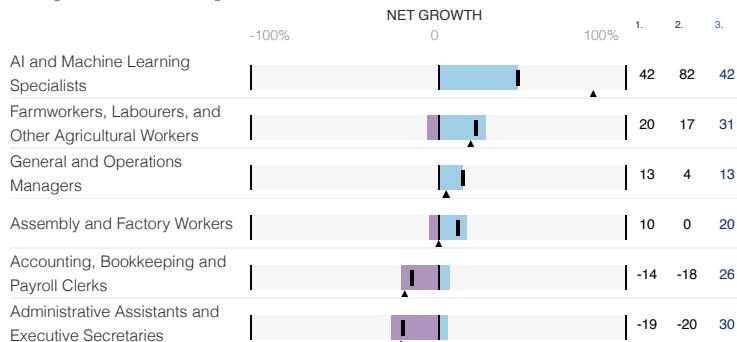
## Jobs outlook

### 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

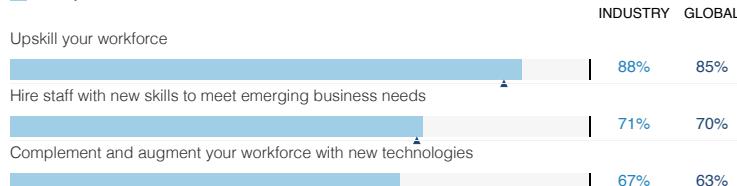


## Workforce Strategy outlook

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

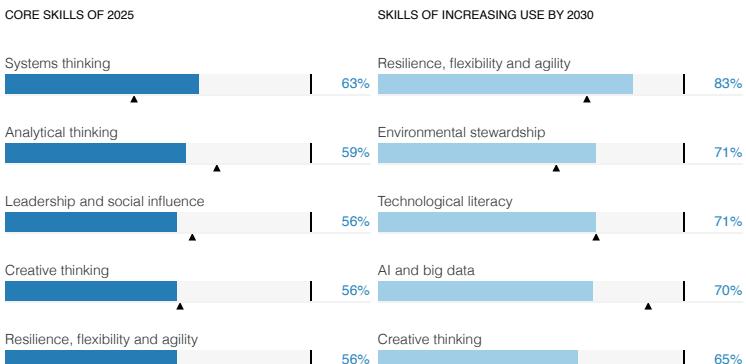


## Skill outlook

### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global



## Upskilling and reskilling outlook



# 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

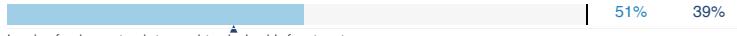
█ Industry █ Global

INDUSTRY GLOBAL

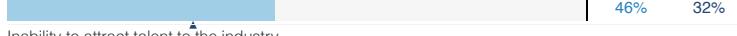
Skills gaps in the labour market



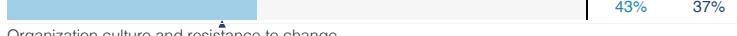
Outdated or inflexible regulatory framework



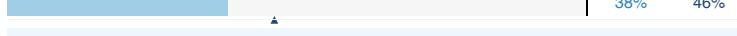
Lack of adequate data and technical infrastructure



Inability to attract talent to the industry



Organization culture and resistance to change



## 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)

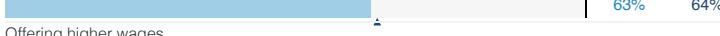
█ Industry █ Global

INDUSTRY GLOBAL

Improving talent progression and promotion processes



Supporting employee health and well-being



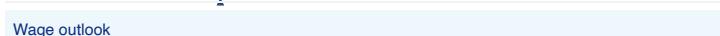
Offering higher wages



Providing effective reskilling and upskilling



Articulate business purpose and impact



## 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

63% 29% 8%

52% 41% 7%

## DEI Actions

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

42 | Global 42

Set DEI goals, targets or quotas

38 | Global 51

Run comprehensive DEI training for managers and staff

33 | 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

61 | Global 69

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

61 | Global 62

Hiring new people with skills to better work alongside AI

57 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

# 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

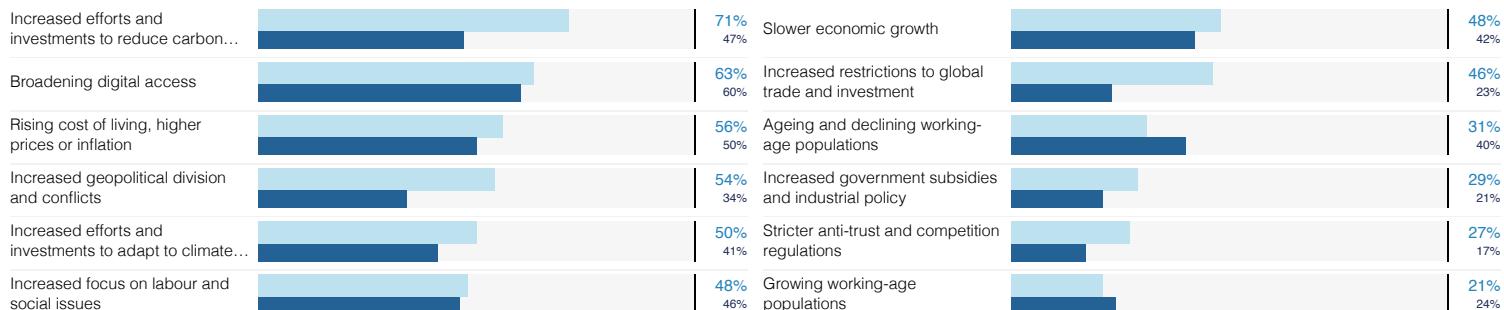
Share of organizations running AI programmes

### Trend outlook

#### Macrotrends driving business transformation

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

■ Industry ▲ Global

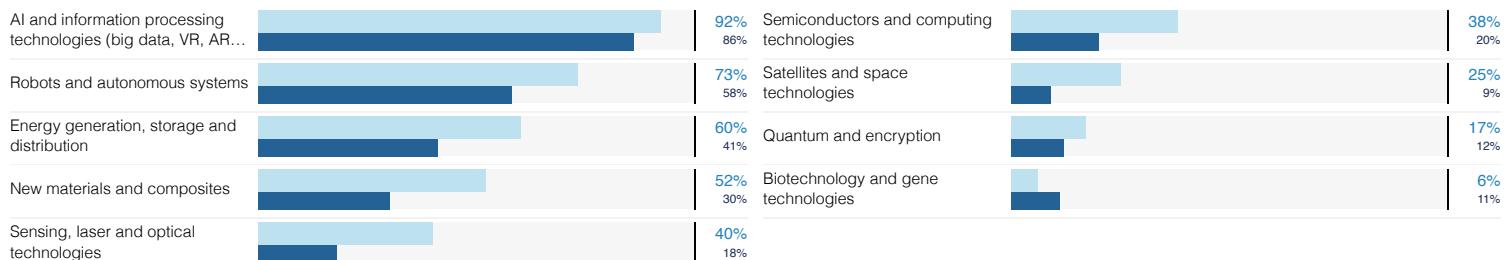


### Technology trends

#### Technology trends driving business transformation

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

■ Industry ▲ Global



### Jobs outlook

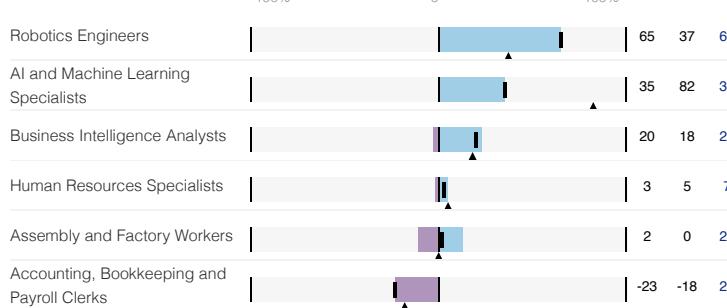
#### Key roles for business transformation

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

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

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

NET GROWTH  
-100% 0 100% 1. 2. 3.



### Workforce Strategy outlook

#### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

INDUSTRY GLOBAL



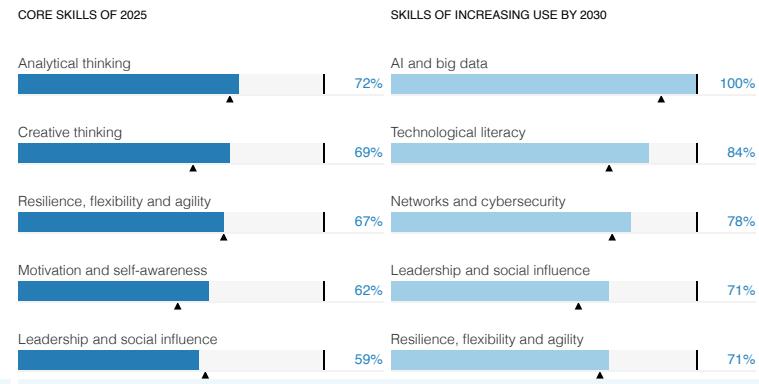
### Skill outlook

#### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025



#### 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

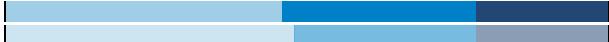
### Human-machine frontier

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



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



Organization culture and resistance to change



Inability to attract talent to my firm



Shortage of investment capital



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



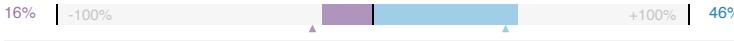
Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



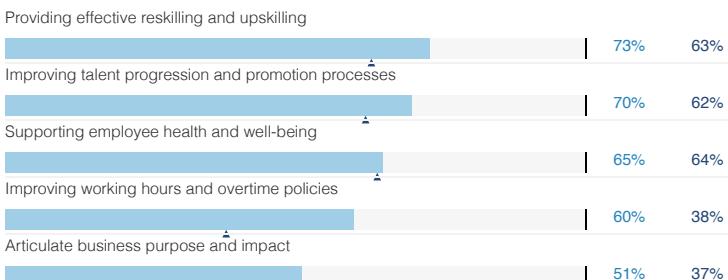
## Business Practice

### Business practices to improve talent availability

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



INDUSTRY GLOBAL



## 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 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

Increased efforts and investments to reduce carbon...	65% 47%	Rising cost of living, higher prices or inflation	38% 50%
Increased efforts and investments to adapt to climate...	65% 41%	Increased focus on labour and social issues	35% 46%
Broadening digital access	50% 60%	Increased government subsidies and industrial policy	29% 21%
Slower economic growth	47% 42%	Ageing and declining working-age populations	29% 40%
Increased geopolitical division and conflicts	44% 34%	Growing working-age populations	18% 24%
Increased restrictions to global trade and investment	41% 23%	Stricter anti-trust and competition regulations	15% 17%

## Technology trends

### Technology trends driving business transformation

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

■ Industry ■ Global

New materials and composites	76% 30%	Biotechnology and gene technologies	18% 11%
AI and information processing technologies (big data, VR, AR...)	73% 86%	Quantum and encryption	12% 12%
Energy generation, storage and distribution	64% 41%	Sensing, laser and optical technologies	12% 18%
Robots and autonomous systems	49% 58%	Satellites and space technologies	3% 9%
Semiconductors and computing technologies	18% 20%		

## 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

NET GROWTH -100% 0 100% 1. 2. 3.

AI and Machine Learning Specialists

Business Development Professionals

Strategic Advisors

Chemical Processing Plant Operators

Lawyers

Administrative Assistants and Executive Secretaries

## Workforce Strategy outlook

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

INDUSTRY GLOBAL

Upskill your workforce

73% 85%

Hire staff with new skills to meet emerging business needs

68% 70%

Complement and augment your workforce with new technologies

68% 63%

## Skill outlook

### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025

Resilience, flexibility and agility	66%	AI and big data	86%
Creative thinking	62%	Environmental stewardship	75%
Leadership and social influence	59%	Talent management	67%
Motivation and self-awareness	52%	Networks and cybersecurity	65%
Curiosity and lifelong learning	48%	Leadership and social influence	63%

## Upskilling and reskilling outlook

48 | 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

8 | Global 11

Would be unlikely to upskill

# 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

Now



2030

## Key barriers for business transformation

### Transformation barriers

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

Industry    Global

INDUSTRY   GLOBAL

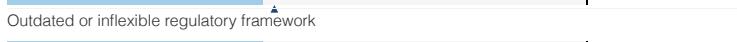
Skills gaps in the labour market



Inability to attract talent to the industry



Organization culture and resistance to change



Outdated or inflexible regulatory framework



Inability to attract talent to my firm



## 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



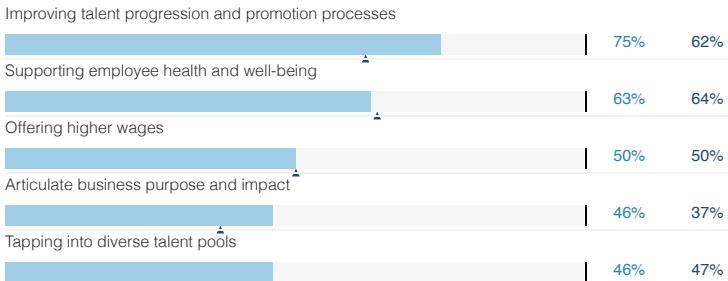
## Business Practice

### Business practices to improve talent availability

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

Industry    Global

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

Growing   Global   Similar   Global   Declining   Global



## DEI Actions

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

**48** | Global 51

Run comprehensive DEI training for managers and staff

**48** | Global 42

Set DEI goals, targets or quotas

**44** | 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

**65** | Global 69

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

**65** | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

**48** | Global 62

Hiring new people with skills to better work alongside AI

# 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

Broadening digital access	■ Industry	■ Global	75% 60%	Ageing and declining working-age populations	■ Industry	■ Global	29% 40%
Increased focus on labour and social issues	■ Industry	■ Global	54% 46%	Growing working-age populations	■ Industry	■ Global	27% 24%
Slower economic growth	■ Industry	■ Global	45% 42%	Increased government subsidies and industrial policy	■ Industry	■ Global	20% 21%
Rising cost of living, higher prices or inflation	■ Industry	■ Global	41% 50%	Stricter anti-trust and competition regulations	■ Industry	■ Global	18% 17%
Increased geopolitical division and conflicts	■ Industry	■ Global	36% 34%	Increased efforts and investments to reduce carbon...	■ Industry	■ Global	16% 47%
Increased efforts and investments to adapt to climate...	■ Industry	■ Global	30% 41%	Increased restrictions to global trade and investment	■ Industry	■ Global	11% 23%

## Technology trends

### Technology trends driving business transformation

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

■ Industry ■ Global

AI and information processing technologies (big data, VR, AR...)	■ Industry	■ Global	91% 86%	Satellites and space technologies	■ Industry	■ Global	11% 9%
Robots and autonomous systems	■ Industry	■ Global	55% 56%	New materials and composites	■ Industry	■ Global	11% 30%
Semiconductors and computing technologies	■ Industry	■ Global	23% 20%	Quantum and encryption	■ Industry	■ Global	9% 12%
Energy generation, storage and distribution	■ Industry	■ Global	20% 41%	Biotechnology and gene technologies	■ Industry	■ Global	7% 11%
Sensing, laser and optical technologies	■ Industry	■ Global	16% 18%				

## 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

NET GROWTH  
-100% 0 100% 1. 2. 3.

AI and Machine Learning Specialists	■ Industry	■ Global	42	82	42
Sustainability Specialists	■ Industry	■ Global	34	33	34
University and Higher Education Teachers	■ Industry	■ Global	19	16	24
Vocational Education Teachers	■ Industry	■ Global	13	9	21
Administrative Assistants and Executive Secretaries	■ Industry	■ Global	-8	-20	21
Data Entry Clerks	■ Industry	■ Global	-30	-26	33

## Workforce Strategy outlook

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

	INDUSTRY	GLOBAL
Upskill your workforce	■ Industry	■ Global
Accelerate the automation of processes and tasks	■ Industry	■ Global
Hire staff with new skills to meet emerging business needs	■ 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
Analytical thinking	AI and big data
Resilience, flexibility and agility	Curiosity and lifelong learning
Creative thinking	Creative thinking
AI and big data	Technological literacy
Curiosity and lifelong learning	Analytical thinking

## Upskilling and reskilling outlook

42 | Global 41 26 | Global 29 18 | Global 19 13 | Global 11

