



[2025]

PEOPLE AT WORK

A GLOBAL WORKFORCE VIEW

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OUR MISSION

The ADP Research mission is to make the future of work more productive through data-driven discovery. Companies, workers, and policymakers rely on our finely-tuned data and unique perspective to make informed decisions that impact workplaces around the world.



ABOUT PEOPLE AT WORK

The People at Work report from ADP Research is built on our annual Global Workforce Survey. In 2024, we collected responses from nearly 38,000 people in 34 markets on six continents. We sampled more than 1,000 working adults in each market, stratified by gender and age to achieve a census proportion of each characteristic.

**13,344
Asia-Pacific**

Australia, China, India, Indonesia, Japan, New Zealand, Philippines, Singapore, South Korea, Taiwan, Thailand, Vietnam

**11,197
Europe**

Czech Republic, France, Germany, Italy, Netherlands, Poland, Spain, Sweden, Switzerland, United Kingdom

**5,619
Latin America**

Argentina, Brazil, Chile, Mexico, Peru

**2,181
North America**

Canada, United States

**5,648
Middle East / Africa**

Egypt, Nigeria, Saudi Arabia, South Africa, United Arab Emirates

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LETTER FROM NELA

**GREATER REACH,
DEEPER FINDINGS**

The workplace landscape is being dramatically transformed by rapidly changing technologies and demographics. To give voice to that change from the worker’s perspective, ADP Research is pleased to present People at Work, our annual lens into what workers are thinking and feeling.

For the first time, the report has been built on the ADP Research Global Workforce Survey, which we have conducted annually since 2015. This survey captures the worldwide worker sentiment on a range of important issues.

We expanded the survey this year, nearly doubling the number of markets we reached in 2023. We collected responses from a stratified, random sample of nearly 38,000 working adults in 34 markets on six continents. Our data captures the perspective of workers based on a number of demographics and other factors, including their occupation, industry, and the type of work they do. We delve into a broad range of issues, including levels of worker engagement and stress, their thinking on pay, artificial intelligence, and workplace monitoring.

This rich data makes People at Work a unique and important tool for any organization seeking to better understand its workforce. And this year we released our findings in installments to provide

a more focused analysis of the data by topic, region, and market.

Business leaders worldwide, regardless of their specific needs, will get actionable research on some of the most important issues confronting their employees.

The future of work will be increasingly global and dynamic. The new People at Work is designed to meet both these challenges.

DR. NELA RICHARDSON
Chief economist and ESG officer,
Head of ADP Research



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WORKPLACE MONITORING

THE WIN-WIN OF UPSKILLING

Investments in on-the-job training can lead to higher productivity and less employee turnover.



PEOPLE
AT WORK

2025

1

SKILLS
DEVELOPMENT



UNTAPPED POTENTIAL

3.8% Percentage of workers who learn new skills on the job within two years.

UPSKILLING

3.3x Workers are over 3 times more likely to describe themselves as highly productive when training is provided.

SKILLS READINESS

1 in 4 Ratio of workers who felt highly confident they have the skills to advance.

GENDER BREAKDOWN



Cycle workers have a dismal view of their skills readiness, with only 18% of men and 13% of women believing they're equipped for the next job.

EDUCATION MATTERS; TRAINING ON THE JOB MIGHT MATTER MORE

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Source: ADP Research
Global Workforce Survey

Colleges and vocational schools prepare young adults to enter the job market. But the learning process can't stop there.

With rapid-fire advances in technology bearing down on employers and their workers, on-the-job training and continuing education have become just as important as post-secondary schooling, if not more so. Even people with advanced college degrees might need to bolster their on-the-job skills.

But there's more to this story than building a future-proof labor force. Employers that invest in continued learning and on-the-job development stand to reap bottom-line benefits that go beyond a well-prepared workforce.

Between July 23 and August 6, 2024, we collected data from a stratified, random panel sample of nearly 38,000 working adults across 34 markets. Forty percent of respondents identified themselves as knowledge workers, 20 percent as cycle workers, and 40 percent as skilled task workers. Two-thirds of respondents reported some level of post-secondary education, ranging from vocational training to advanced professional degrees. The rest had a secondary-school diploma or less.

Few of these workers—only 24 percent—were confident that they have the skills they would need to advance to the next job level in the near future.

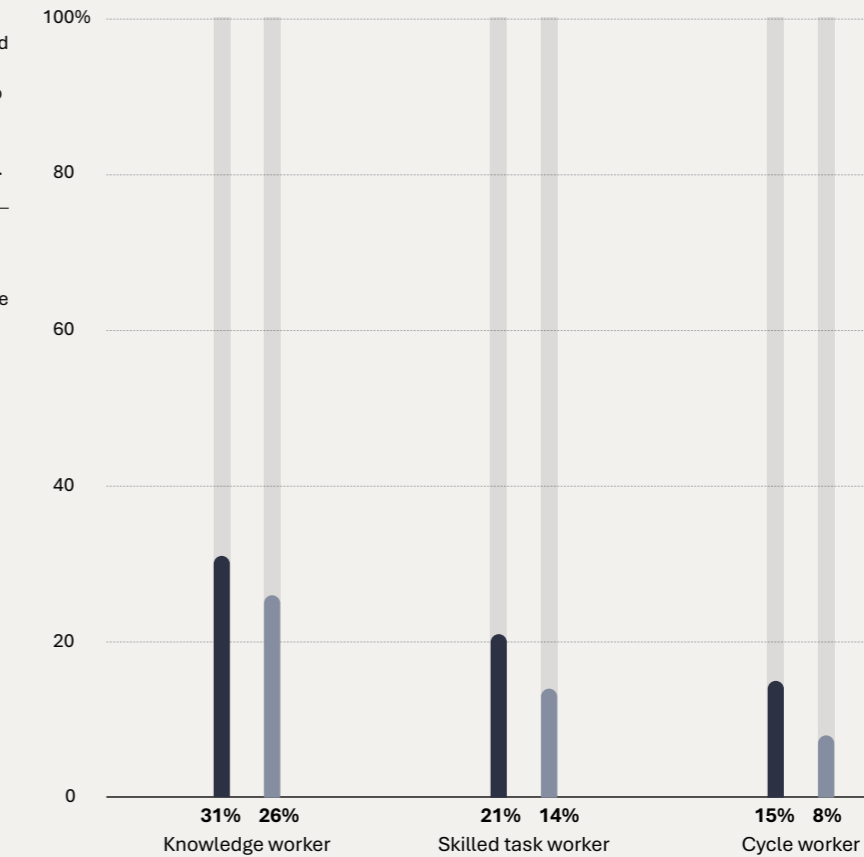
Education made a difference, but only slightly. Among people with some college or vocational training, 27 percent believed they have the skills needed to advance in their career, compared to only 18 percent of people with no post-secondary education.

In short, most workers feel ill-equipped to get ahead.

THE KNOWLEDGE WORKER ADVANTAGE

As job complexity increases, so does the sentiment that employers are investing in upskilling.

- I have the skills needed to advance my career to the next job level in the next 3 years.
- I feel my employer invests in the skills I need for me to advance my career in the future.



DEFINING THE TYPES OF WORKERS

Our survey gave workers three options for describing the work type that best fit their role:

Knowledge worker
I have a level of freedom to use my expertise to create something new.

Skilled task worker
I use a level of expertise to solve similar problems each day.

Cycle worker
I do similar repetitive tasks each day.



UNTAPPED POTENTIAL

In 2023, we used ADP payroll data to analyze the recent job histories of more than 51 million U.S. workers. Based on rates of promotion and other information available, we calculated the share of workers who advanced under their current employer into jobs requiring more skills.

That analysis found that nearly 75 percent of workers leave an employer before ever getting promoted. Among those who stay, fewer than 1 percent are promoted by their third year.

This career development challenge continues with upskilling: Only 3.8 percent of workers learn new skills on the job—upskill—within two years of being hired, our payroll research showed.

In our global survey, most workers think their employers could be doing better when it comes to upskilling. Only 17 percent strongly agreed that their employers were investing in the skills they need for career advancement.

The opportunity to get ahead is important, and not just for workers. When our survey respondents were asked to provide the top reasons why they would stay with their employer, the opportunity for career advancement was second only to flexibility in scheduling.

THE SHARE OF WORKERS WHO LEAVE AN EMPLOYER— FOR ANY REASON—WITHOUT EVER GETTING PROMOTED

NEARLY 75%

AMONG THOSE WHO STAY, FEWER THAN 1% ARE PROMOTED BY THEIR THIRD YEAR.

A WIN-WIN

ADP payroll data from the United States shows that upskilling correlates to a 37 percent increase in wages.² Again, our global survey validated this finding.

Among workers we surveyed who felt strongly that their employers were investing in their skills development, 54 percent had received a recent promotion. The promotion rate fell dramatically—to only 34 percent—among workers who felt let down by their employers' upskilling opportunities.

Employers, too, reap rewards from upskilling in the form of improved reputations, higher productivity, and reduced employee turnover.

Workers who feel strongly that their employer is providing the training they need are nearly 6 times more likely than others to recommend their company as a great place to work.³ They're 3.3 times more likely to describe themselves as

highly productive.

Even among workers who are confident in their skills, training opportunities could have a big impact on retention. When these confident workers believe that their employers are investing in them, they're twice as likely to say they have no intention of leaving their organization, compared to workers who have the skills but lack on-the-job training opportunities.

While this finding holds true for all worker types, upskilling might be a particularly powerful tool for retaining cycle workers. When cycle workers feel they have the skills needed to advance but lack any further investment from their employer, they're more likely than other workers to jump ship.

In fact, worker sentiment on upskilling changes dramatically based on the type of work being done.

Overall, only 24 percent of workers felt highly confident they have the

skills to advance. But among knowledge workers the share jumps to 31 percent.

And 26 percent of knowledge workers strongly agreed that their employers are investing in them. Among skilled task workers, that share was 14 percent, and among cycle workers it was only 8 percent.

These sentiments play into variables we saw by industry. The industries where workers feel most skills-ready—technology services, finance and insurance, and professional, scientific, and technical services—are heavily populated by knowledge workers.

² The Future of Jobs Report 2025
³ We asked respondents the following question: Thinking about your current (primary) employer, how likely would you be to recommend your company to a family member or friend as a place to work? We used a rating scale between 0 and 10, where 0 was "Not at all likely" and 10 was "Extremely likely". We categorized respondents who selected either 9 or 10 on the scale as people who would recommend, or promote, their company. More information on talent brand promoters can be found in *Today at Work* Issue 2 from ADP Research.

BUILDING A WORKFORCE THAT STAYS

When employers invest in upskilling, their workers are much less likely to quit. Among people who feel confident in their skills, the share who have no intent to leave rises when on-the-job training is available.

No intent to leave
● Receives further employer investment
● Does not receive further employer investment





GENDER DIFFERENCES

Men in our survey were more likely than women to strongly agree that they have the skills needed to advance. But when it comes to feelings of employer investment, the gender gap shrinks or disappears altogether outside of North America.⁴

The biggest gender gap occurs among cycle workers. Among this group, only 18 percent of men and 13 percent of women believe that they're equipped for their next job. Cycle workers of both sexes also have a dismal view of employer investment in their skills, with only 9 percent of men and 7 percent of women expressing satisfaction in their upskilling opportunities.

Among cycle workers



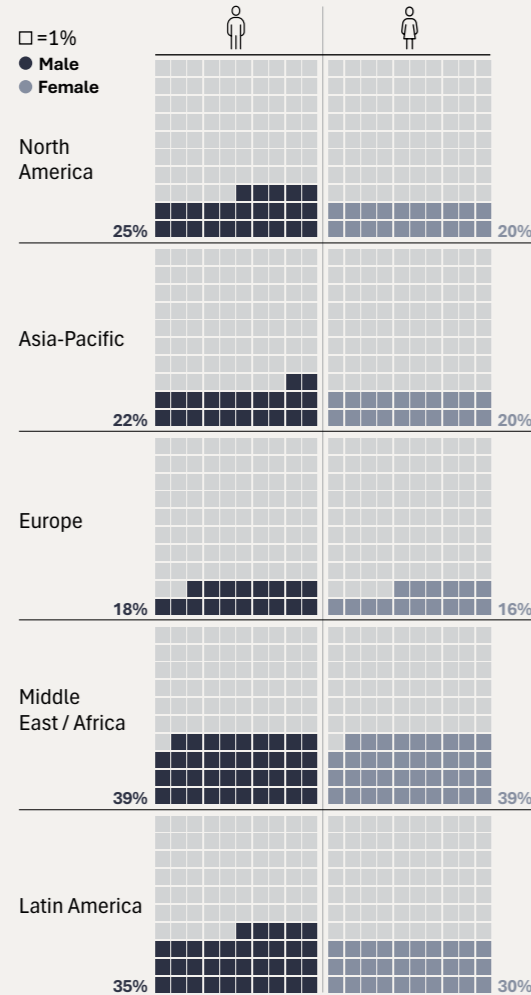
believe that they're equipped for the next job.

⁴Regional differences might be an artifact of the distribution of worker type. In six of the markets we studied, more than 50 percent of respondents were knowledge workers, a group for which employer investment is reported to be higher.

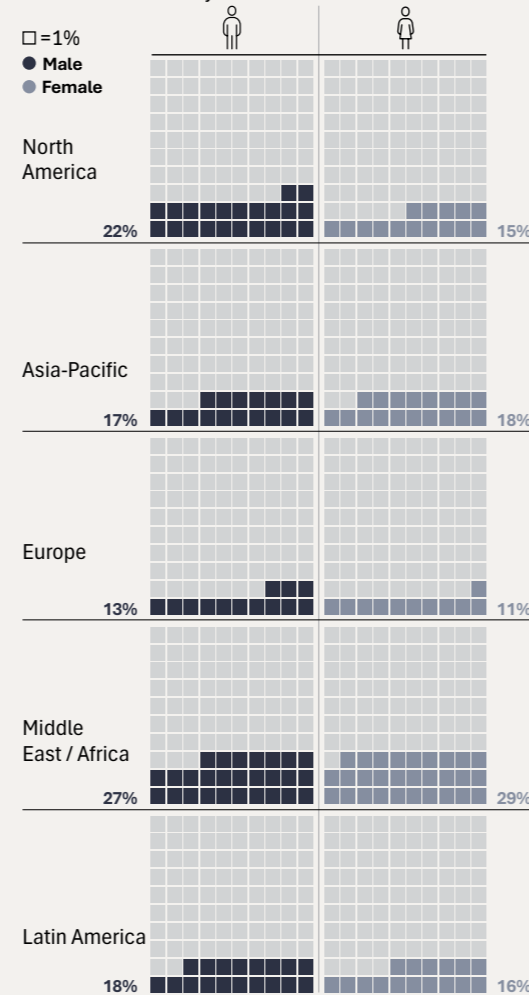
THE UPSKILLING GENDER GAP

Men are more likely to feel they have the skills they need to advance in their careers. When it comes to employer investment in upskilling, this gender gap is especially pronounced in North America.

I have the skills needed to advance my career to the next job level in the next 3 years.



I feel my employer invests in the skills I need for me to advance my career in the future.



THE TAKEAWAY

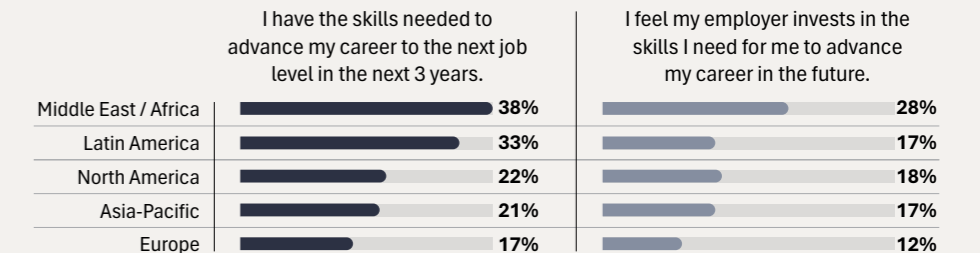
Employers who devote resources to on-the-job development can build a more highly skilled workforce. And that investment can result in teams that are more productive and loyal to the organization. While post-secondary education matters, the training that organizations do after workers are hired might matter even more. Our sample looks across worker types to help us understand that no matter the job complexity, when workers receive skills training, they are more likely to stay, effectively reducing the high cost of turnover.

SHARE OF WORKERS WHO STRONGLY AGREE, by market

Market	I have the skills needed to advance my career to the next job level in the next 3 years.	I feel my employer invests in the skills I need for me to advance my career in the future.
Asia-Pacific		
India	37%	32%
Vietnam	29	23
Philippines	26	21
Indonesia	26	20
Thailand	25	24
Singapore	23	23
China	23	20
New Zealand	20	14
Australia	19	14
Taiwan	10	10
South Korea	9	5
Japan	3	2
Europe		
United Kingdom	22%	17%
Switzerland	20	18
Spain	19	11
Sweden	18	9
France	18	12
Germany	16	15
Poland	15	10
Italy	14	10
Netherlands	13	10
Czech Republic	12	10

Market	I have the skills needed to advance my career to the next job level in the next 3 years.	I feel my employer invests in the skills I need for me to advance my career in the future.
Latin America		
Brazil	37%	24%
Mexico	35	20
Chile	32	14
Argentina	30	12
Peru	30	15
Middle East / Africa		
Nigeria	45%	27%
Egypt	44	35
South Africa	42	29
Saudi Arabia	36	28
United Arab Emirates	24	18
North America		
Canada	22%	17%
United States	22	20

Share of workers who strongly agree, by region





SHARE OF WORKERS WHO STRONGLY AGREE, by age and region

I have the skills needed to advance

	18-26	27-39	40-54	55-64
North America	21%	25%	22%	21%
Asia-Pacific	26	24	19	11
Europe	19	20	15	12
Middle East / Africa	37	41	36	32
Latin America	29	35	34	31

My employer invests in the skills I need

	18-26	27-39	40-54	55-64
North America	22%	24%	16%	14%
Asia-Pacific	20	20	17	8
Europe	13	14	12	9
Middle East / Africa	28	30	24	19
Latin America	17	18	15	17

SHARE OF WORKERS WHO STRONGLY AGREE, by age

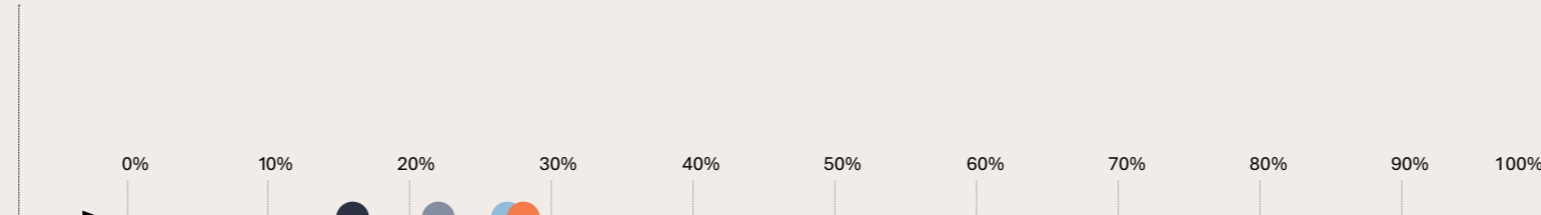
Younger workers in our survey were more likely to strongly agree that they had the skills they need to advance in their careers.

Age groups

- 18 to 26
- 27 to 39
- 40 to 54
- 55 to 64

Source:
ADP Research
Global Workforce Survey

I have the skills needed to advance my career to the next job level in the next 3 years.



I feel my employer invests in the skills I need for me to advance my career in the future.



SHARE OF WORKERS WHO STRONGLY AGREE, by industry

Technology and finance workers were the most likely to believe they have the skills they need to advance in their careers. This finding aligns with our responses from knowledge workers.

	I have the skills needed to advance my career to the next job level in the next 3 years.	I feel my employer invests in the skills I need for me to advance my career in the future.
Technology services	34%	25%
Finance and insurance	31	25
Professional, scientific, and technical services	27	17
Real estate and rental and leasing	27	22
Construction and related trades	25	18
Information	25	19
Manufacturing	24	17
Arts, entertainment, and recreation	24	16
Educational services	23	14
Retail/wholesale trade	23	17
Public administration/service	23	14
Administrative/support services and waste management/remediation	22	15
Utilities	21	18
Agriculture, forestry, fishing and hunting	21	17
Accommodation and food services	21	13
Health care and social assistance	21	13
Mining, quarrying, and oil and gas extraction	21	18
Transportation & warehousing	19	12
Other personal services	18	14

SKILLS DEVELOPMENT

ENGAGEMENT

STRESS

MULTIPLE JOBS

DISCRIMINATION

CAREER BARRIERS

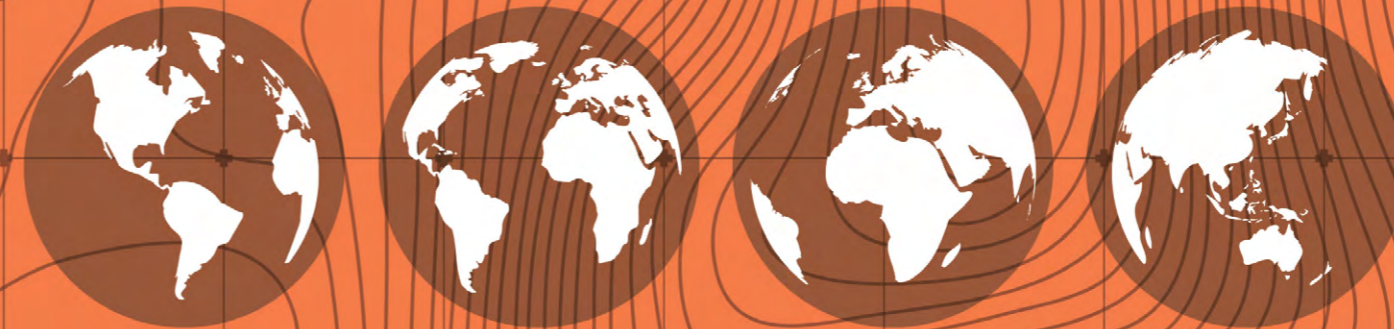
ARTIFICIAL INTELLIGENCE

PAY EQUITY

WORKPLACE MONITORING

EMPLOYEE ENGAGEMENT IS ON THE RISE

Engaged workers are more productive, less likely to quit, and generally just happier with their jobs.



**PEOPLE
AT WORK**

2025

2

ENGAGEMENT



WORKER ENGAGEMENT IS ON THE RISE

More employees reported being engaged on the job in 2024, continuing a post-pandemic trend.

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Nearly 1 in 5 workers worldwide reported being fully engaged on the job in 2024, a record high in data going back a decade. It was the third straight year that the share of engaged workers grew.

The global share of engaged employees now stands at 19 percent, 5 percentage points higher than its pandemic low of 2020, when only 14 percent of workers reported feeling fully engaged on the job.

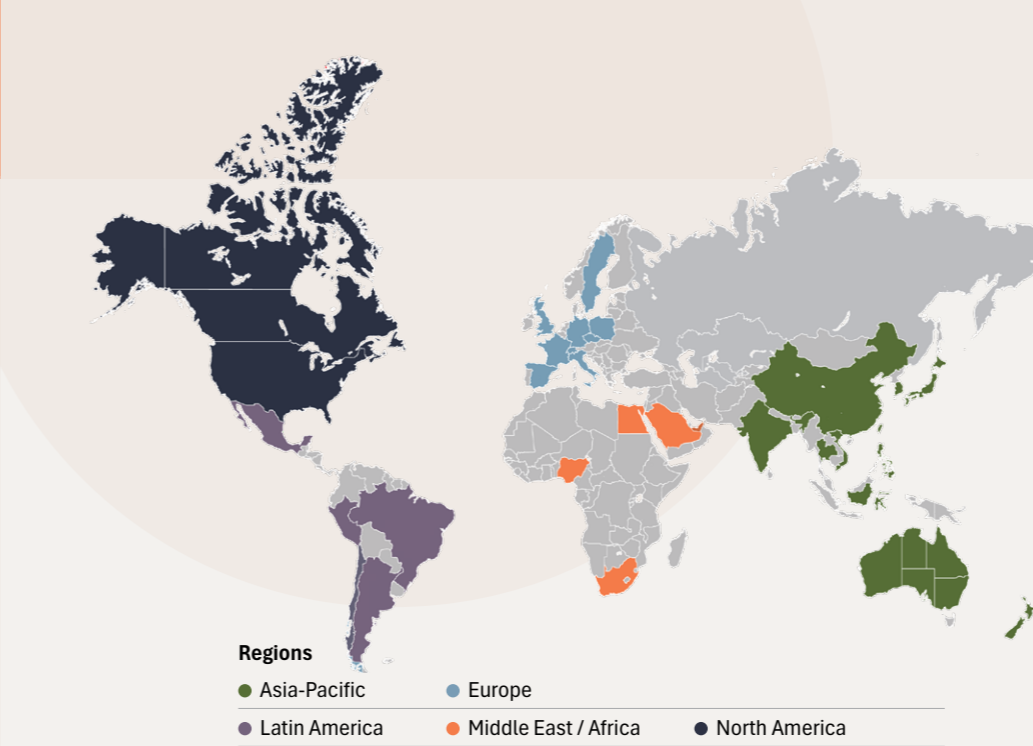
Source: ADP Research Global Workforce Survey

WHAT IS ENGAGEMENT?

ADP Research has been tracking worker engagement around the world for 10 years. We define engagement as the emotional state of mind that causes people to do their best work and do it sustainably. This means they're doing their best work now and are likely to continue doing it.

Engagement is an important metric. Our research has established a strong connection between a person's level of engagement on the job to their level of productivity and loyalty to their employer. All organizations, big or small, want to retain workers and enhance their productivity. As such, all employers have an interest in fully engaging their workforce.

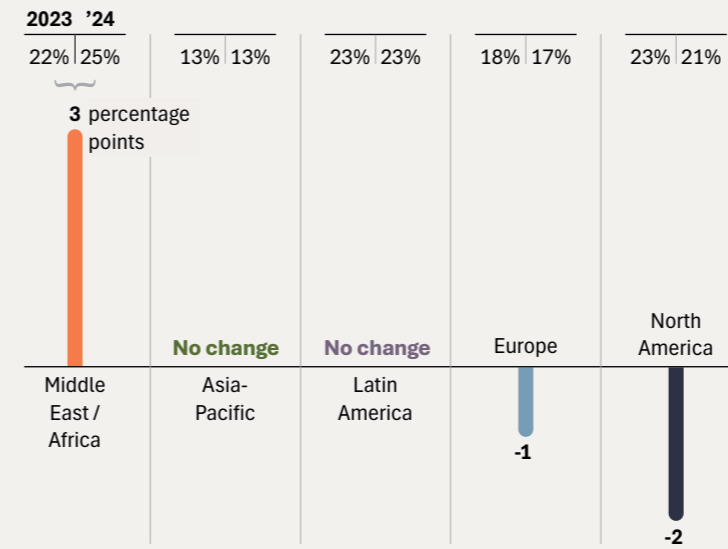
Our research on employee engagement is built on an annual survey of people worldwide. In 2024, we surveyed nearly 38,000 workers across 34 markets. Responses were collected between July 23 and August 1, 2024.



Regions
 ● Asia-Pacific ● Europe
 ● Latin America ● Middle East / Africa ● North America

SHARE OF FULLY ENGAGED WORKERS

YOY percentage-point change by region



SHARE OF FULLY ENGAGED WORKERS, by market

Winners

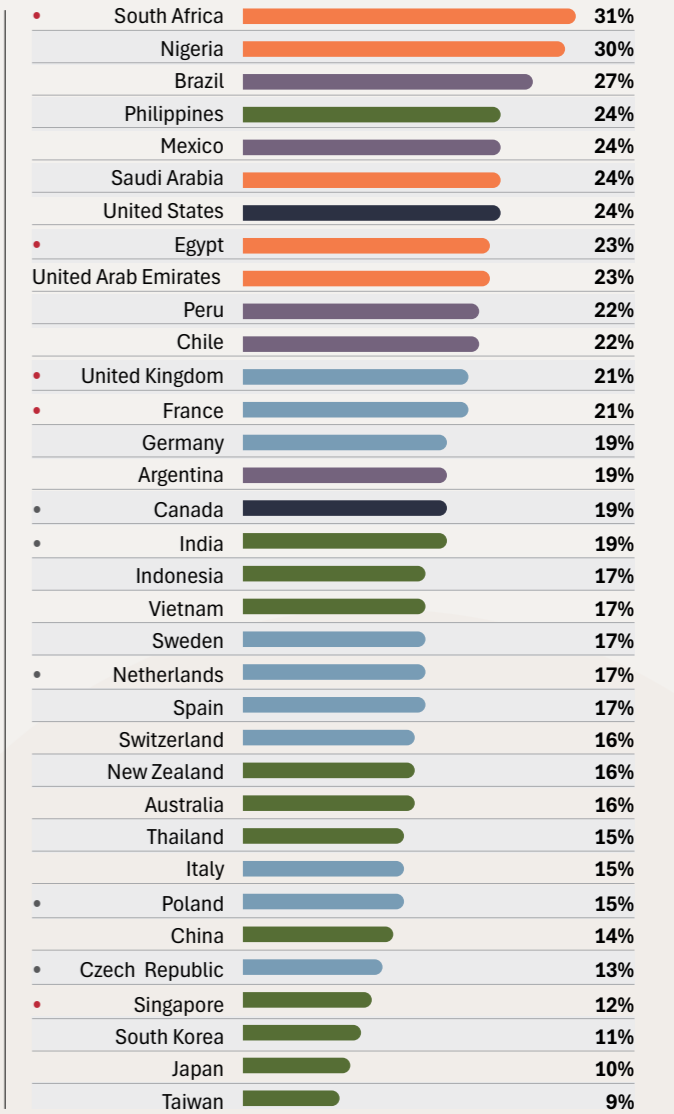
YOY percentage-point increase

- France..... 5
- South Africa..... 5
- Singapore..... 5
- Egypt..... 4
- United Kingdom... 3

Losers

YOY by percentage-point decrease

- India..... -5
- Poland..... -4
- Canada -3
- Czech Republic .. -3
- Netherlands -2





LOCATION MATTERS, TOO

As the pandemic-driven downturn recedes, more people are returning to full-time, on-site work.

In 2024, 56 percent of workers said they do their jobs on site every day, up 2 percentage-point from the year before and 8 percentage points from 2022.

There are two possible explanations for the growing share of on-site workers. More employers are requiring people to work on site, at least part of the time. Worker preferences could be changing, too, with more people choosing to go the office or job site.

Hybrid work, which many human capital experts thought might be the new normal, has lost ground.

North America experienced the biggest shift of any region in workers returning to the office or job site, with the share of on-site workers growing 8 percentage points to 60 percent.

Germany had the biggest increase in on-site workers. The share grew 12 percentage points to 60 percent, a gain that came predominantly at the expense of hybrid work.

While the share of fully engaged, on-site workers has been increasing

steadily over the last few years, hybrid workers still are the most likely to report being fully engaged.

The connection between engagement and hybrid work might have its roots in worker empowerment.

When we asked people about employer policies on hybrid and remote work, respondents who had complete flexibility to choose where they work each day—whether on site or somewhere else—were much more likely to be fully engaged than workers who were less empowered.

This pattern held regardless of where respondents actually spent their working hours. Office and other on-site workers who had the flexibility to choose their workplace were just as likely to be fully engaged as hybrid workers with the same level of freedom. It's having the choice that matters.

In many professions, work can be done only on site; having a choice isn't an option. But employers who are pulling their hybrid and remote employees back on site might want to consider the powerful relationship between workplace flexibility and worker engagement.

NORTH AMERICA EXPERIENCED THE BIGGEST SHIFT OF ANY REGION IN WORKERS RETURNING TO THE OFFICE OR JOB SITE.



THE SHARE OF ON-SITE NORTH AMERICA WORKERS, AN INCREASE OF 8 PERCENTAGE POINTS .

AMONG MARKETS, GERMANY HAD THE BIGGEST INCREASE IN ON-SITE WORKERS. THE SHARE GREW 12 PERCENTAGE POINTS TO 60 PERCENT, A GAIN THAT CAME PREDOMINANTLY AT THE EXPENSE OF HYBRID WORK.

WHERE WORK IS HAPPENING: OFFICE/ONSITE, REMOTE, HYBRID, by market

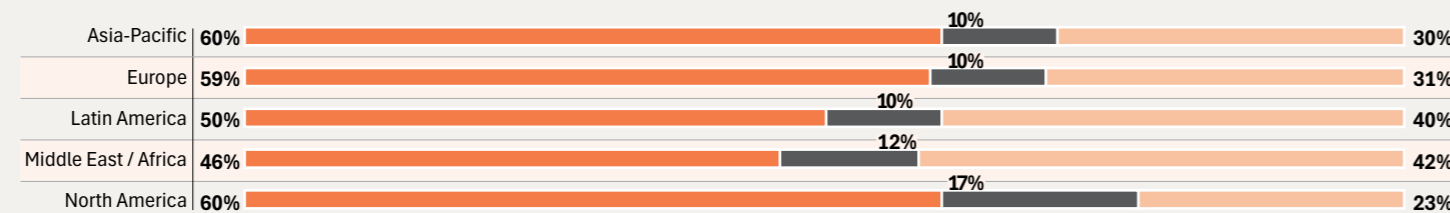
Market	Office / on-site	Remote	Hybrid
Asia-Pacific			
South Korea	81%	5%	14%
Japan	77	4	19
Taiwan	62	4	34
Singapore	61	23	16
Thailand	58	8	34
Australia	57	13	30
Philippines	57	20	23
China	55	4	41
Indonesia	55	9	36
New Zealand	52	16	32
Vietnam	52	10	38
India	50	14	36
Europe			
Italy	65%	9%	26%
France	64	8	28
Sweden	62	8	30
Spain	61	7	32
Germany	60	14	26
Poland	58	13	29
Czech Republic	57	11	32
United Kingdom	54	14	32
Netherlands	53	12	35
Switzerland	52	18	30

Market	Office / on-site	Remote	Hybrid
Latin America			
Mexico	55%	8%	37%
Brazil	53	12	35
Argentina	50	9	41
Chile	45	14	41
Peru	44	16	40
Middle East / Africa			
Saudi Arabia	56%	9%	35%
United Arab Emirates	51	22	27
South Africa	44	12	44
Nigeria	39	13	48
Egypt	39	7	54
North America			
United States	65%	17%	18%
Canada	53	21	26

WHERE WORK IS HAPPENING by market

● Office / on-site ● Remote ● Hybrid

Some workers have more options than others. The availability of remote and hybrid work differs by region.





TEAMS MATTER

Ninety percent of people we surveyed reported being part of a team at work. As with geography and work location, teams can influence worker engagement.

From a leadership perspective, building teams themselves isn't enough; they must be high-quality teams.

Members of high-performing teams are far more likely to report full engagement on the job than workers on average teams—55 percent to 10 percent.

Few survey respondents—fewer than 1

in 5—said they worked on the best team they've ever been a part of, meaning employers have plenty of room for improvement in this area.

On-site workers were the only group to show an improvement over 2023 in the quality of their teams. Year-over-year, fewer hybrid and remote workers reported being members of the best team.

This rise in high-performing teams might have contributed to the rise in engagement for on-site, full-time workers.

SHARE OF WORKERS ON THE BEST TEAM, by market

Asia-Pacific	
India	33%
Thailand	26
China	24
Singapore	23
Indonesia	22
Philippines	22
Vietnam	18
Australia	17
New Zealand	17
Taiwan	11
South Korea	8
Japan	3
Latin America	
Brazil	25%
Mexico	21
Peru	20
Argentina	18
Chile	17

Europe	
United Kingdom	20%
Germany	18
Switzerland	18
Spain	17
France	13
Sweden	13
Italy	13
Czech Republic	13
Poland	13
Netherlands	11
Middle East / Africa	
Egypt	39%
Nigeria	29
Saudi Arabia	28
South Africa	27
United Arab Emirates	17
North America	
United States	24%
Canada	20

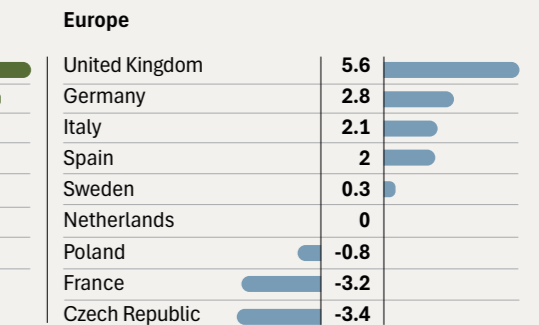
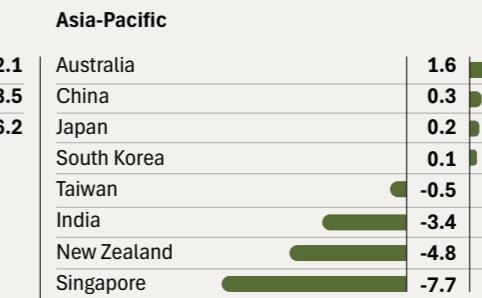
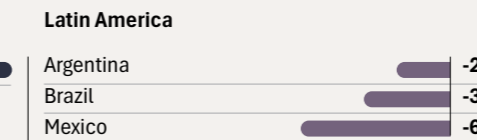
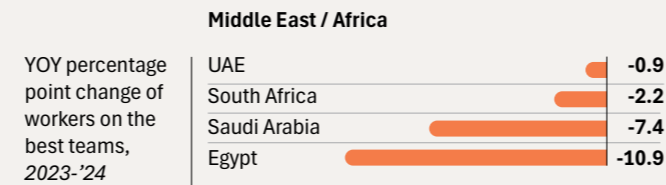
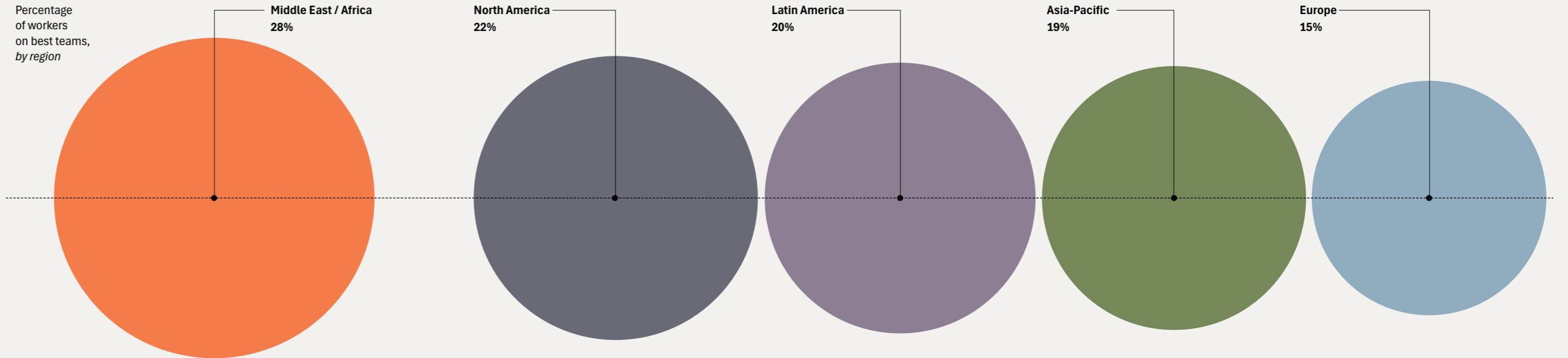
1 in 5

Fewer than 1 in 5 respondents said they worked on the best team they've ever been a part of.

SHARE OF WORKERS WHO SAY THEIR TEAM IS THE BEST TEAM*

Work teams are commonplace these days. But only a small share get high marks from their members.

Percentage of workers on best teams, by region



*Note: Comparing only markets that have 2023 data



GEOGRAPHY MATTERS

When we look at worker engagement by region, however, stark differences emerge. Economic, social, and political conditions can affect how workers think and feel, leading to differences by market and region.

Regionally, the Middle East / Africa had the biggest gain, with the share rising 3 percentage points to 25 percent. The region's growth in engagement was led by Egypt, which showed a 4 percentage-point gain.

North America, by contrast, fared poorly, with worker engagement falling 2 points year over year. The decline was driven by Canada, where the share of engaged employees fell 3 percentage points to 18 percent.

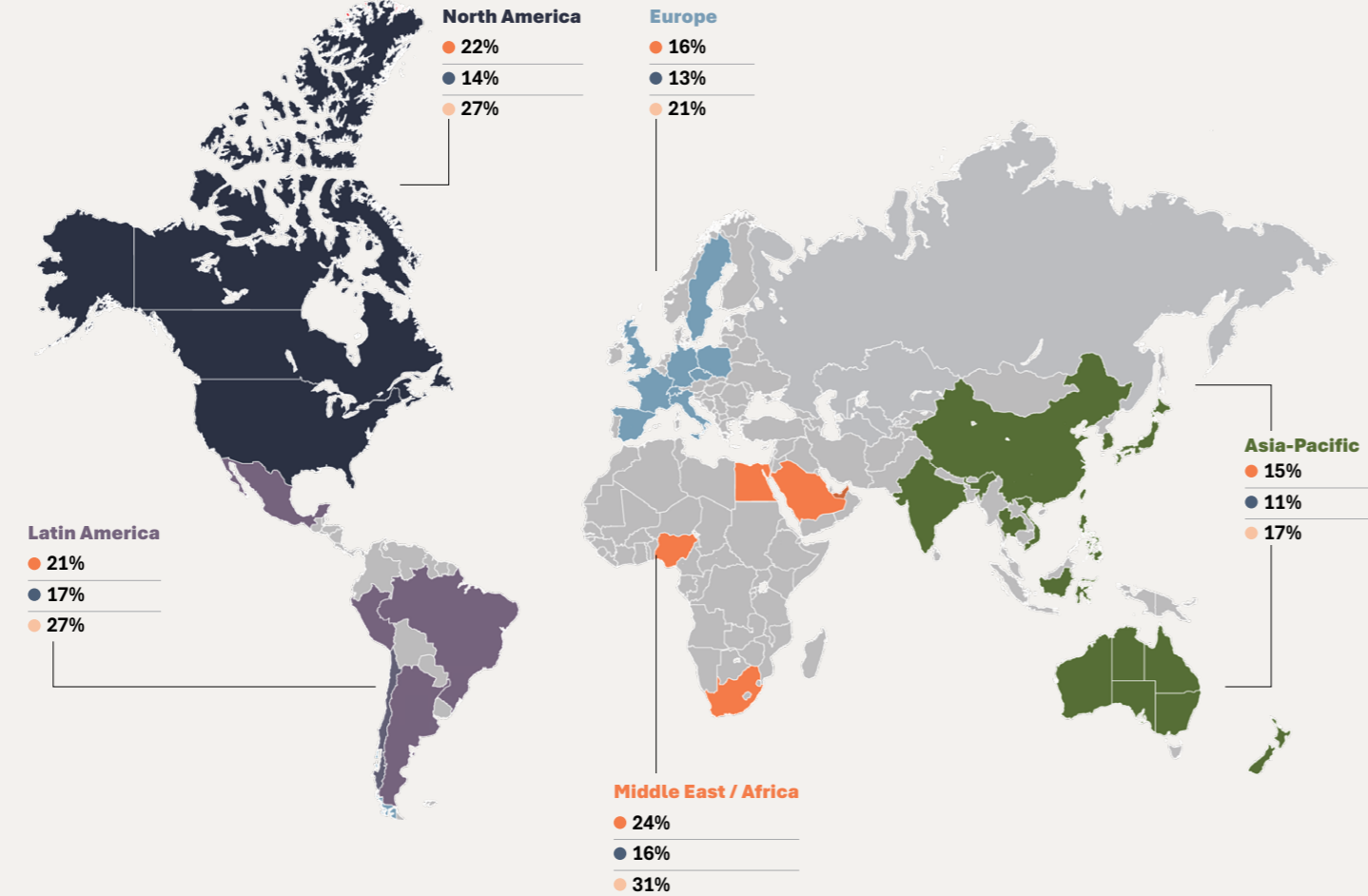
In Europe, Poland, the Czech Republic, and the Netherlands were among the world's biggest losers when it came to engaged workers, pushing the entire 10-market region down in 2024.

Among all markets, India posted the biggest decline in engagement, which dropped 5 percentage points to 19 percent.

Worker engagement was steady in Latin America.

PERCENTAGE OF FULLY ENGAGED WORKERS

- Office / on-site
- Remote
- Hybrid



PERCENTAGE OF FULLY ENGAGED WORKERS, by work location

Region	Office / on-site	Remote	Hybrid
Asia-Pacific			
Philippines	25%	17%	28%
India	21	8	19
Indonesia	18	13	17
Thailand	18	10	12
Australia	17	13	15
New Zealand	15	12	20
Vietnam	15	12	20
Singapore	14	7	13
China	13	6	17
South Korea	10	11	13
Japan	8	4	17
Taiwan	8	3	12
Europe			
France	21%	11%	25%
United Kingdom	19	10	30
Germany	18	15	25
Netherlands	18	16	15
Switzerland	17	8	20
Italy	15	10	17
Sweden	15	14	21
Spain	14	12	22
Poland	13	16	17
Czech Republic	10	17	19

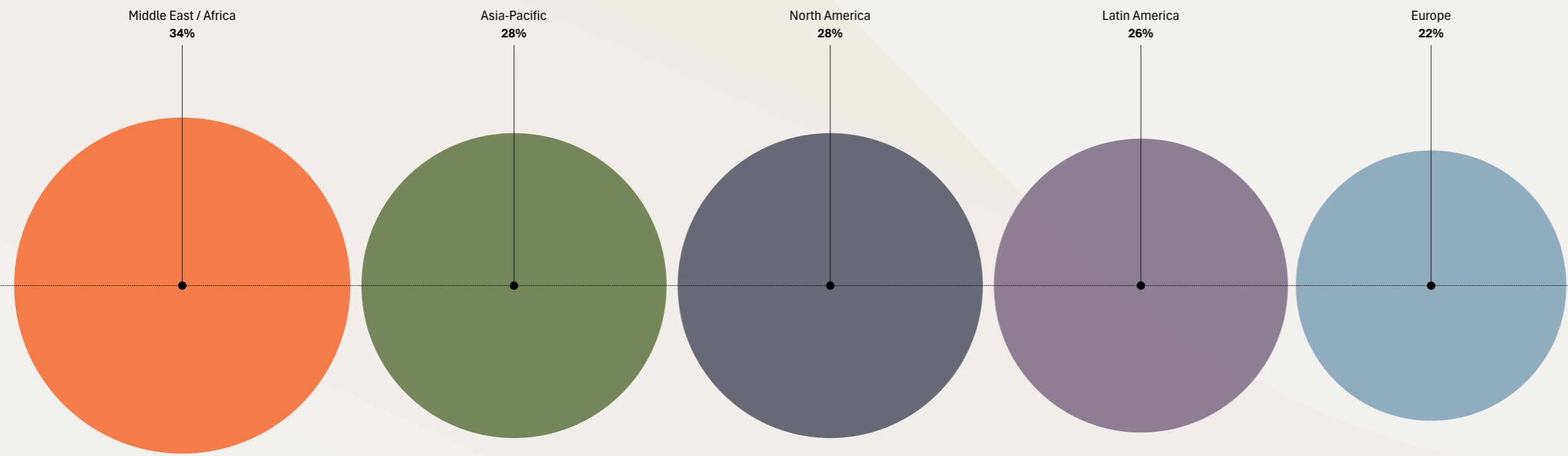
Region	Office / on-site	Remote	Hybrid
Latin America			
Brazil	24%	23%	32%
Mexico	23	16	28
Chile	21	16	25
Peru	21	13	27
Argentina	15	19	24
Middle East / Africa			
Nigeria	31%	23%	31%
South Africa	28	25	34
Saudi Arabia	23	12	29
Egypt	22	21	25
United Arab Emirates	19	7	41
North America			
United States	24%	16%	31%
Canada	18	12	25

↑5PP

In 2024, Singapore, France, and South Africa had the biggest increase in engaged workers, with the share rising by 5 percentage points from the previous year in each of the three markets.



**COMPLETE FLEXIBILITY
IN CHOOSING WORK LOCATION,**
by region



Market	I have complete flexibility in choosing my work location
Egypt	47%
India	45
Philippines	43
Vietnam	38
Saudi Arabia	35
Thailand	35
Indonesia	33
Peru	31
South Africa	31
Nigeria	30
Switzerland	29
Canada	28
Brazil	27
Singapore	27
United States	27
Chile	26
Netherlands	26

Market	I have complete flexibility in choosing my work location
United Arab Emirates	26%
Mexico	25
New Zealand	24
United Kingdom	24
Germany	22
Argentina	21%
Australia	21
China	21
Sweden	20
Czech Republic	19
Japan	19
Italy	17
France	15
Spain	15
South Korea	13
Taiwan	13

Source: ADP Research Global Workforce Survey

**THE
TAKEAWAY**

It's difficult to overstate the value of employee engagement. ADP Research has shown that engaged workers are more productive, less likely to quit, and generally just happier with their jobs.

The good news for employers is that engagement can be nurtured. A productive first step is to empower workers to make decisions about where they do their jobs, be it always on site, or mixed with quiet days from home.

When employers provide workers a choice, and give them the boost of high-performing teams, everyone, regardless of where they work, can reap the benefits of engagement.

SKILLS DEVELOPMENT

ENGAGEMENT

STRESS

MULTIPLE JOBS

DISCRIMINATION

CAREER BARRIERS

ARTIFICIAL INTELLIGENCE

PAY EQUITY

WORKPLACE MONITORING

PEOPLE AT WORK

2025

WORKERS GOT A BREAK FROM STRESS LAST YEAR

But too few of them were thriving, which could lead to lower productivity and higher turnover.



3
STRESS



WORKERS GET A BREAK

THE INCIDENCE OF HIGH STRESS ON THE JOB HAS SLOWED, BUT TOO FEW PEOPLE ARE THRIVING

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Chronic worker stress reached a new low in 2024, with the share of people reporting daily on-the-job stress plunging from 15 percent in 2023 to 7.5 percent last year.

The decline continues a trend that began after the pandemic, with fewer people each year reporting high-frequency, negative on-the-job stress. But this relief hasn't coincided with a boost in the share of workers who are thriving at work.

Source: ADP Research Global Workforce Survey

TYPES OF WORKERS

By measuring the frequency of positive and negative stress on the job, we categorize workers as:

- ✓ Thriving
- ✓ Rattled
- ✓ Overloaded

MEASURING STRESS

ADP Research divides stress into two types.

Positive stress, or eustress, is beneficial, such as the adrenaline rush of a challenging deadline. Negative or bad stress—distress—is the opposite, the kind of pressure that leads to less productivity, not more.

By measuring the frequency of both types of stress on the job, we categorize workers as thriving, rattled, or overloaded.

Thriving workers are more likely to experience work pressure as eustress. They're more engaged, more resilient, more productive, and less likely to quit their jobs.

Overloaded workers experience job pressure much more negatively and score lower in every category of worker well-being that we measure.

FEWER OVERLOADED WORKERS

Everyday stress has been on the decline since the pandemic, according to the ADP Research Global Worker Survey. In 2021, 19 percent of workers we surveyed said they experienced negative stress on the job every day. That number has been shrinking each year since.

This relief from everyday job stress aligned with the world's emergence from the Covid-19 pandemic. But it also coincided with a global decline in unemployment.

The unemployment rate has been falling steadily since the start of the pandemic in 2020, when it hit a record 6.6 percent. In 2023 it fell to 5 percent for the first time since 1991, according to World Bank data.

As society and the economy settle into a post-pandemic normal, workers are facing less uncertainty. People have greater opportunities to find desirable jobs. It all adds up to relief from stress.

But this decline in overloaded workers hasn't coincided with an increase in thriving workers. Bad stress is down, but too few people are finding joy on the job.

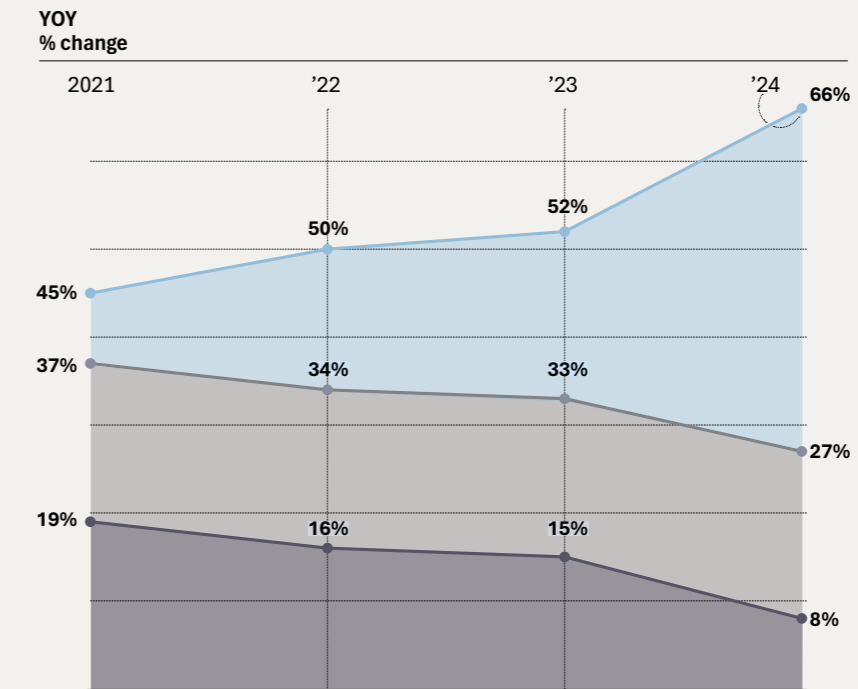
'Too few people are finding joy on the job.'

We asked survey respondents the following question: **In the last year, how often have you experienced (bad) stress at work?** Respondents who said they experienced bad stress every day were categorized as high stress. Those who said two to six times per week were categorized as moderate stress. Those who said once a week or less were categorized as low stress.

GLOBAL STRESS FREQUENCY

Share of workers who experience high, moderate, and low levels of stress.

- Low stress: once a week or less
- Moderate: 2-6 times per week
- High: every day



Percentages might add up to more than 100 due to rounding. More information about our stress metric can be found in [Today at Work issue 4](#).

FEWER THRIVING WORKERS, TOO

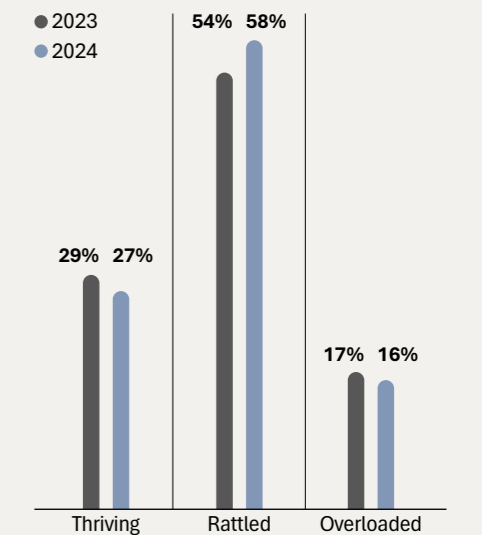
Between July 23 and August 6, 2024, our Global Worker Survey collected data from a stratified, random panel sample of nearly 38,000 working adults in 34 markets on six continents.

Between 2023 and 2024, as the share of overloaded workers shrank, the share of thriving workers did, too. More people fell in a middle range—rattled workers—reporting a fairly even mix of good days and bad.

Rattled workers haven't mastered how to fill their days with more positive stress or minimize negative stress.

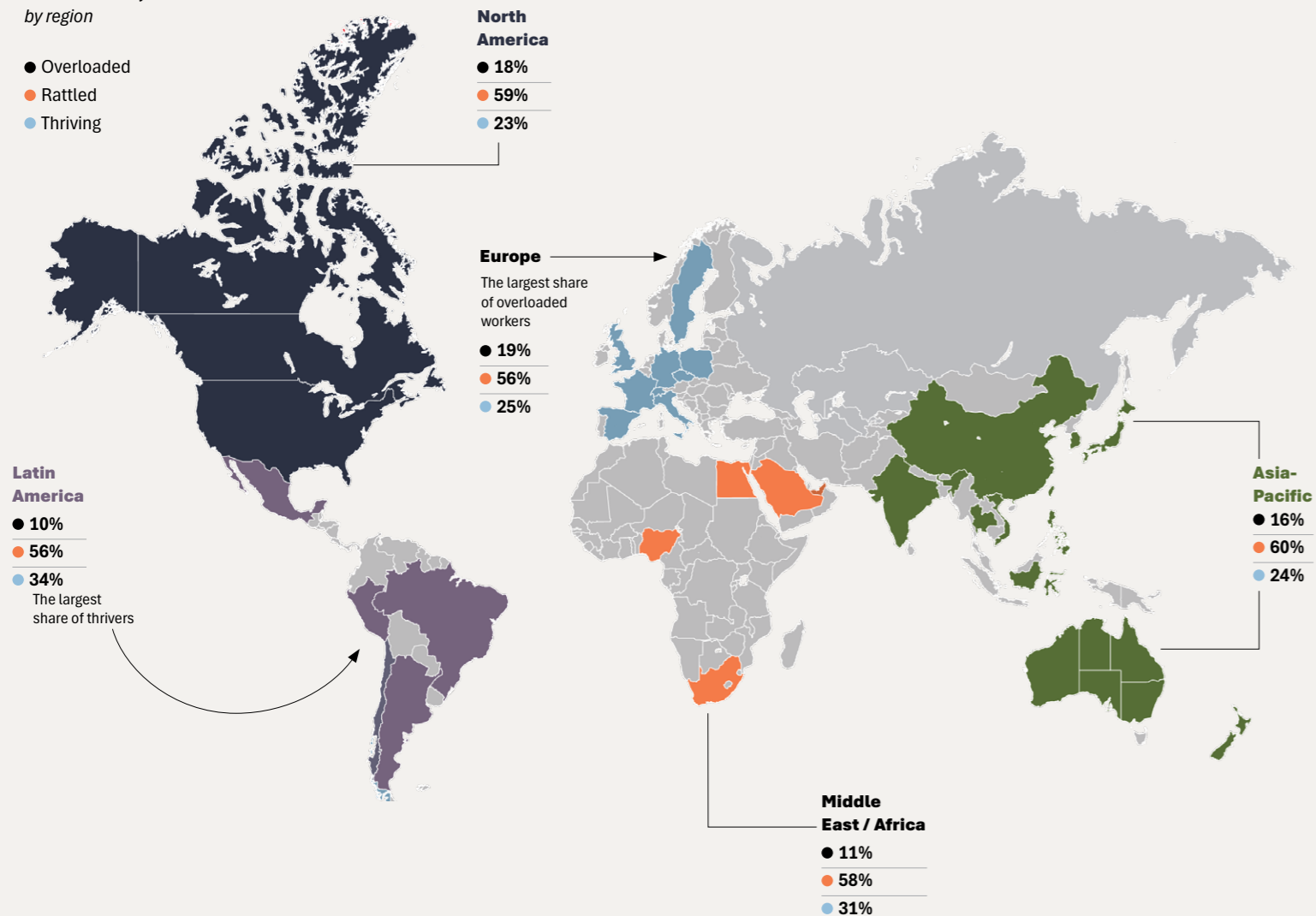
ANNUAL CHANGE IN STRESS, YOY percentage change, 2023-'24

Share of workers who are thriving, rattled, or overloaded.





SHARE OF WORKERS IN EACH STRESS CATEGORY, by region



REGIONAL FINDINGS

Latin America has the largest share of thrivers, at 34 percent, and the smallest share of workers who felt overloaded, at only 10 percent.

In North America, only 23 percent of workers said they were thriving, the smallest share of any region.

Of all regions, Europe has the largest share of overloaded workers, at 19 percent.

By market, 53 percent of workers in China were thriving in 2023, the largest share of any market that year. But China saw the biggest decline in thrivers in 2024, dropping 13 percentage points to 40 percent.

Still, China's share of thriving workers remains large compared to some of its regional neighbors. In South Korea, the share of thriving workers fell 4 percentage points to 15 percent, the smallest share in the region.

Singapore had the biggest increase in the share of thriving workers, up 11 percentage points to 26 percent.

SHARE OF WORKERS WHO ARE ...

THRIVING, by year

Market	2023	2024
Argentina	33%	31%
Australia	21	22
Brazil	49	41
Canada	26	22
Chile	N/A	31
China	53	40
Czech Republic	23	22
Egypt	43	41
France	19	20
Germany	28	23
India	22	20
Indonesia	N/A	27
Italy	32	26
Japan	19	19
Mexico	39	35
Netherlands	31	23
New Zealand	25	24
Nigeria	N/A	29
Peru	N/A	32
Philippines	N/A	30
Poland	38	32
Saudi Arabia	32	30
Singapore	15	26
South Africa	43	36
South Korea	19	15
Spain	35	31
Sweden	30	28
Switzerland	N/A	21
Taiwan	23	21
Thailand	N/A	19
United Arab Emirates	19	20
United Kingdom	21	24
United States	27	24
Vietnam	N/A	25

OVERLOADED, RATTLED OR THRIVING, by market

Overloaded	Rattled	Thriving	Market
10%	59%	31%	Argentina
23	55	22	Australia
10	49	41	Brazil
20	58	22	Canada
12	57	31	Chile
10	50	40	China
23	55	22	Czech Republic
6	53	41	Egypt
18	62	20	France
20	56	23	Germany
11	70	20	India
13	60	27	Indonesia
19	55	26	Italy
19	62	19	Japan
10	55	35	Mexico
18	58	23	Netherlands
20	56	24	New Zealand
10	61	29	Nigeria
8	60	32	Peru
7	63	30	Philippines
13	55	32	Poland
11	58	30	Saudi Arabia
15	59	26	Singapore
10	54	36	South Africa
26	59	15	South Korea
19	50	31	Spain
24	49	28	Sweden
20	59	21	Switzerland
26	54	21	Taiwan
14	67	19	Thailand
16	63	20	United Arab Emirates
20	57	24	United Kingdom
17	60	24	United States
13	62	25	Vietnam



THE STRESS OF BEING WATCHED— AND JUDGED

A large share of survey respondents reported feeling watched or judged at work. And as more people return to offices and job sites, remote and hybrid work, even when allowed by company policy, has become tinged with negativity, our survey showed. These worker sentiments can lead to greater negative stress and, ultimately, reduced productivity.

In 2024, 32 percent of survey respondents said they felt judged for taking advantage of flexible working arrangements. Workers who feel judged are 3.4 times less likely to be thriving on the job.

A similar relationship exists between stress and feeling watched. Workers who feel like their manager is monitoring everything they do are 3.3 times less likely to be thriving. This matters for employers, because stressed-out, overloaded workers tend to be less productive.



The Middle East and Africa had the largest share of workers who felt judged for taking advantage of flexible working arrangements. The region also had the largest share of workers who felt monitored by their manager.



36%



42%

Latin America had the smallest share of workers who reported feeling judged. Europe had the smallest share of workers who felt monitored.



29%



31%

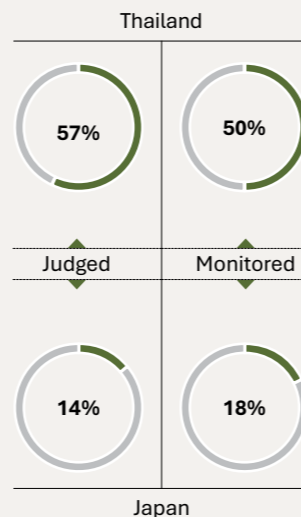
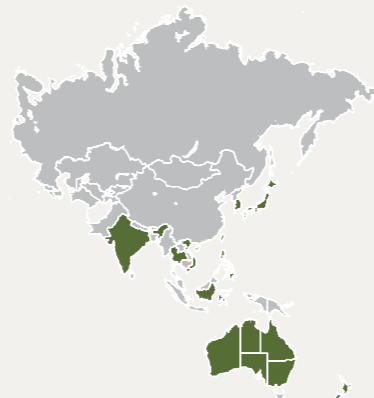
A few markets in Asia-Pacific were particular outliers. Roughly two-thirds of workers in India felt both judged and monitored, by far the largest share globally. In Thailand, more than half of the workforce reported feeling judged, and half said they felt monitored. Japan had the smallest share of workers who felt judged or monitored.



65%



67%



Employers take note: Workers who are stressed-out and overloaded tend to be less productive.

SHARE OF WORKERS WHO FEEL JUDGED FOR TAKING ADVANTAGE OF FLEXIBLE WORKING ARRANGEMENTS

Region	Share who feel judged
Middle East / Africa	36%
Asia-Pacific	33
North America	31
Europe	30
Latin America	29

Market	Share who feel judged
India	67%
Thailand	57
Singapore	48
Egypt	43
Switzerland	42
Poland	41
Nigeria	40
Saudi Arabia	39
Mexico	35
China	34
United Arab Emirates	33
Vietnam	33
Netherlands	32
Australia	31
Canada	31
United States	31

Market	Share who feel judged
Peru	30%
Brazil	30
Spain	30
Philippines	29
Germany	28
France	28
United Kingdom	28
Chile	28
Italy	27
New Zealand	26
Argentina	24
South Africa	22
Taiwan	22
Sweden	21
Indonesia	21
Czech Republic	20
South Korea	19
Japan	14

SHARE OF WORKERS WHO FEEL THEIR MANAGER IS MONITORING EVERYTHING THEY DO

Region	Share who feel monitored
Middle East / Africa	42%
Latin America	38
Asia-Pacific	38
North America	35
Europe	31

Market	Share who feel monitored by manager
India	65%
Thailand	50
Egypt	49
Singapore	47
Saudi Arabia	45
Nigeria	45
Peru	43
Philippines	41
United Arab Emirates	41
Mexico	40
Switzerland	40
China	40
Brazil	40
Indonesia	38
Spain	37
Vietnam	36
United States	35

Market	Share who feel monitored by manager
Chile	35%
Canada	35
Australia	33
United Kingdom	33
Argentina	31
France	31
South Africa	31
Germany	31
Czech Republic	30
Netherlands	30
New Zealand	30
Poland	29
South Korea	29
Italy	28
Taiwan	27
Sweden	23
Japan	18



People who identified as a racial or ethnic minority in their market were less likely to be thriving at work.

RACIAL AND ETHNIC MINORITIES EXPERIENCE STRESS DIFFERENTLY

In all 34 markets we surveyed, people who identified as a racial or ethnic minority in their market were less likely to be thriving at work. They also were more likely to experience negative stress.

The difference was particularly stark in Europe, where workers who identified as a minority were 2.5 times less likely to be thriving at work than those who didn't.

In Spain, only 8 percent of self-identified minorities were thriving, compared to 33 percent of non-minorities. But the smallest share of thriving minority workers was in Singapore: Only 6 percent were thriving in 2024, compared to 37 percent of workers who didn't identify as minorities.

Few markets showed little difference between minority identification and the likelihood of thriving, all of them in the Asia-Pacific region. In Australia and Japan, the share of self-identified minorities who were thriving

was only one percentage point less than that of non-minorities; in South Korea and New Zealand, the difference was only three percentage points.

Some of this difference between those who identify as a minority and those who don't might be due to feelings about workplace flexibility and constantly being watched.

Forty-five percent of workers who identified as a minority said they feel judged for taking advantage of flexible working arrangements, and nearly half (48 percent) said they feel monitored by their manager.

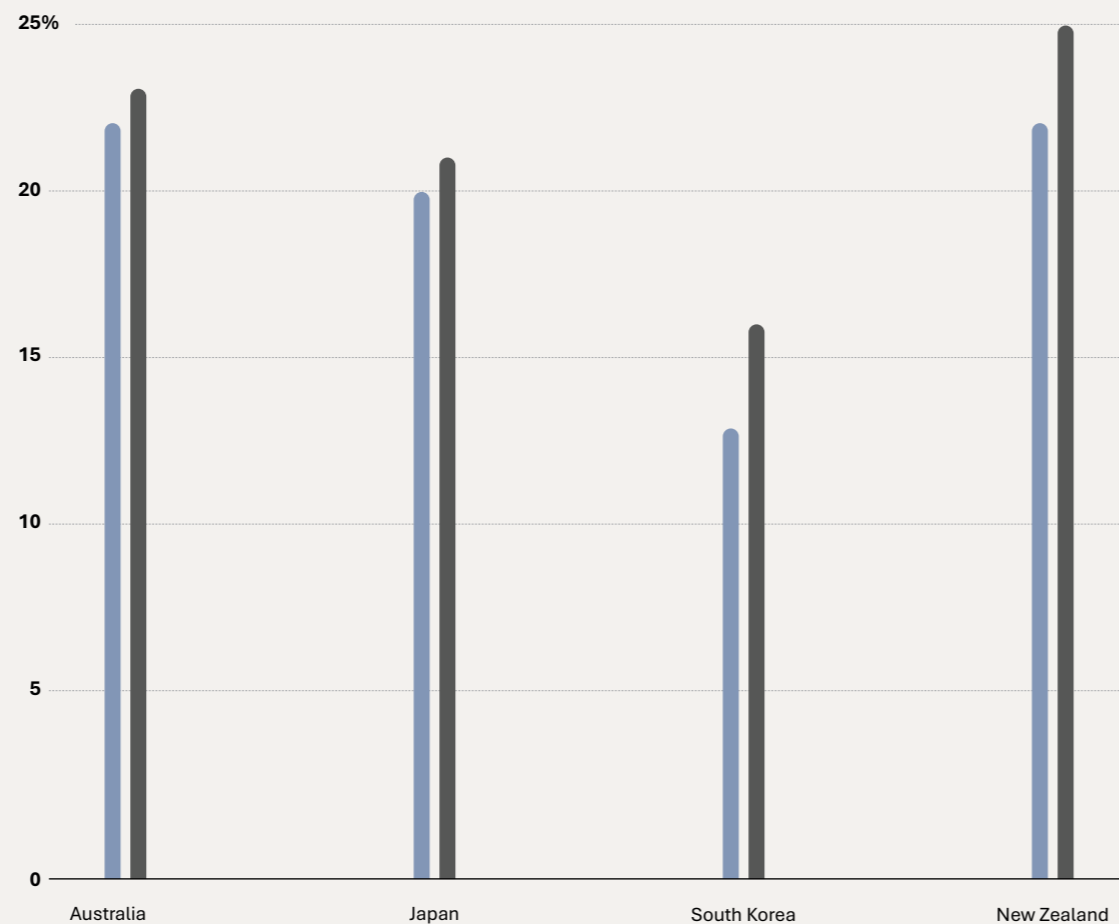
For those who don't identify as a minority, the share drops substantially—29 percent felt judged, and 34 percent felt monitored.

For people who identify as a minority, these differences in how they feel about their interactions with colleagues and managers might lead to higher instances of negative stress at work.

SHARE OF WORKERS WHO ARE THRIVING

A handful of markets showed little difference between minority identification and the likelihood of thriving. All of them were in the Asia-Pacific region.

● Identifies as a minority ● Does not identify as a minority



SHARE OF THRIVING WORKERS BY ETHNIC OR RACIAL MINORITY IDENTIFICATION

Share of workers who are thriving, by market

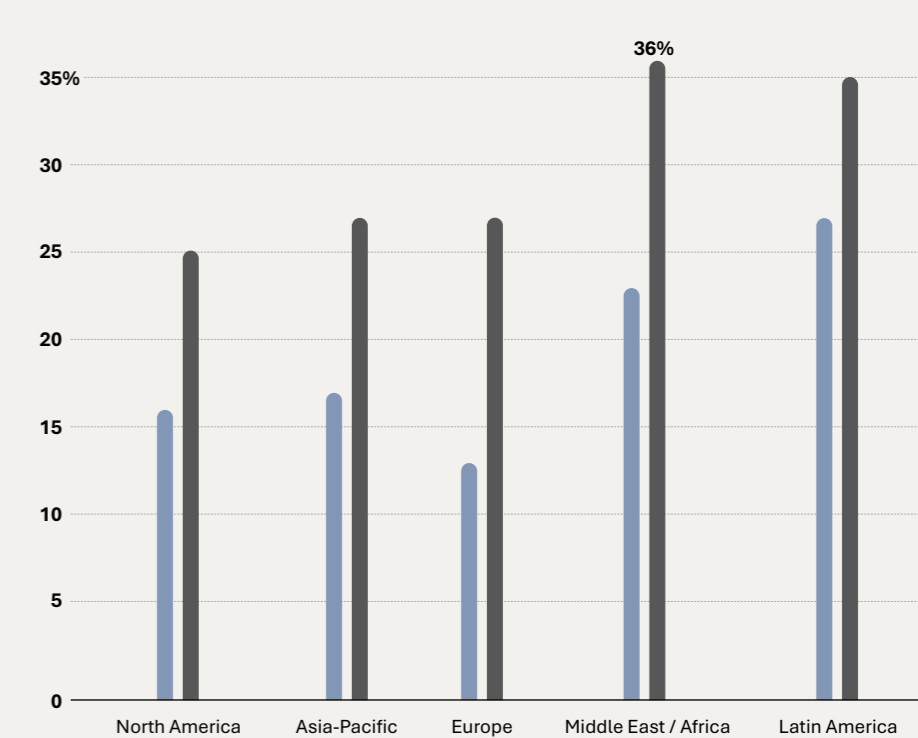
Market	Identifies as minority	Does not identify as minority
Argentina	25%	32%
Australia	22	23
Brazil	37	43
Canada	18	23
Chile	23	32
China	23	42
Czech Republic	13	23
Egypt	30	43
France	10	22
Germany	13	26
India	11	25
Indonesia	23	28
Italy	14	28
Japan	20	21
Mexico	19	36
Netherlands	20	24
New Zealand	22	25
Nigeria	24	33

Market	Identifies as minority	Does not identify as minority
Peru	18%	35%
Philippines	26	33
Poland	25	33
Saudi Arabia	13	36
Singapore	6	37
South Africa	34	40
South Korea	13	16
Spain	8	33
Sweden	12	31
Switzerland	7	27
Taiwan	16	23
Thailand	9	22
United Arab Emirates	9	28
United Kingdom	15	26
United States	14	26
Vietnam	17	27

SHARE OF WORKERS WHO ARE THRIVING, by region

People who identify as a racial or ethnic minority in their market were far less likely to be thriving at work.

● Identifies as a minority ● Does not identify as a minority



THE TAKEAWAY

Unbalanced stress leads workers to report being less productive on the job. These same people are more likely to be looking for a new place to work. Thriving workers, on the other hand, are less likely to be job-hunting.



HOW WE CONDUCTED THIS RESEARCH

ADP Research divides stress into two types: Positive stress, or eustress, is beneficial, such as the adrenaline rush of a challenging deadline. Negative stress, or distress, is the opposite, the kind of pressure that leads to less productivity, not more.

By measuring the frequency of both types of stress on the job, we categorize workers as thriving, rattled, or overloaded.

Thriving workers are more likely to experience work pressure as eustress. They're more engaged, more resilient, more productive, and less likely to quit. They show higher levels of motivation and commitment.

Overloaded workers experience job pressure more negatively and score lower in every category of worker well-being that we measure.

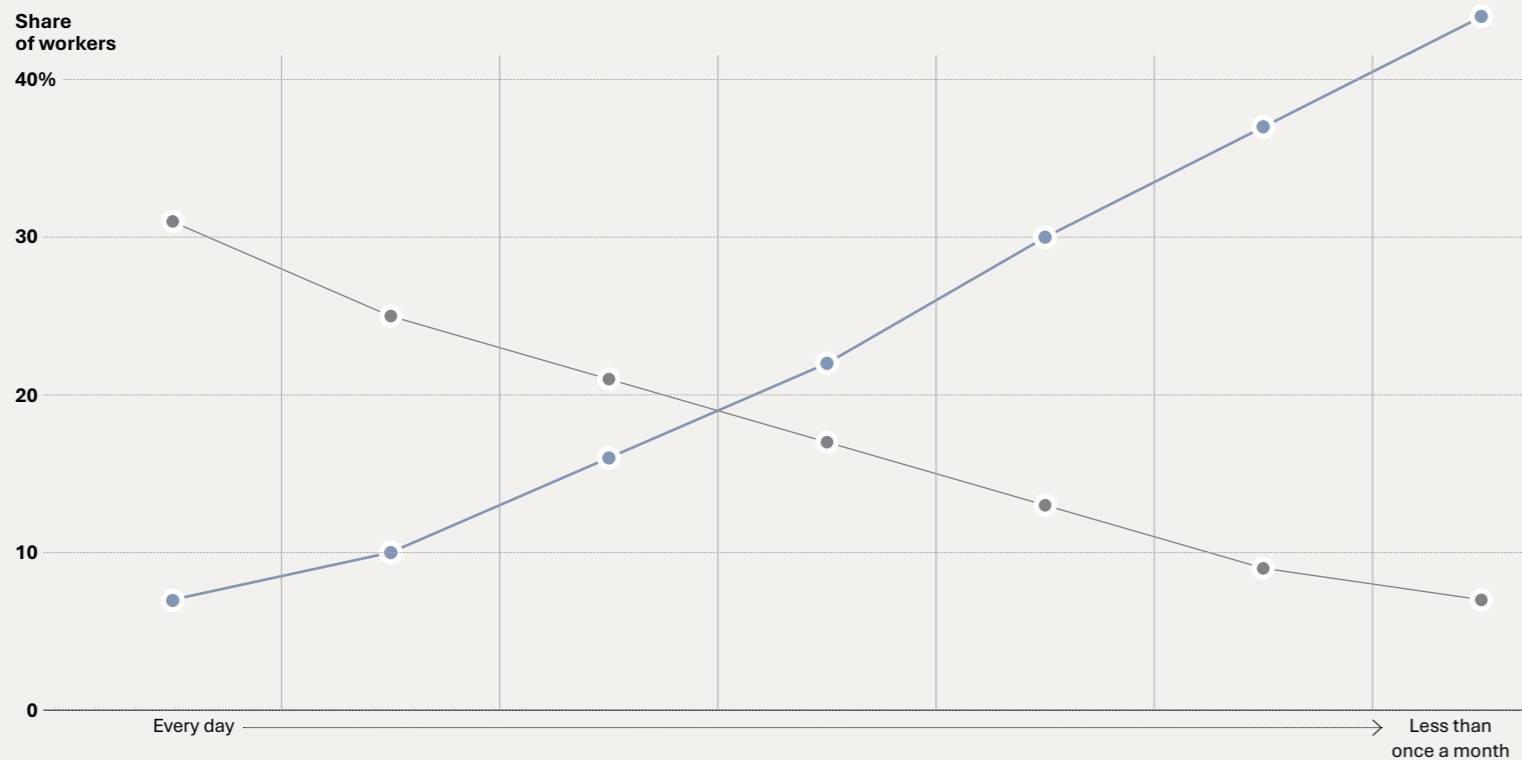
Rattled workers fall in the middle. They experience stress and might not particularly like it, but they cope, perhaps at somewhat lower levels of productivity than they might achieve if they were thriving.

A relationship takes shape when we look at how often workers report experiencing bad stress on the job, and where they land on our

MORE STRESS, FEWER THRIVING WORKERS

There is a strong relationship between the frequency of bad stress and being overloaded or thriving. We looked at how often workers report experiencing bad stress on the job and the occurrence of thriving workers.

● Overloaded ● Thriving



eustress/distress scale.

Those who report bad stress on a daily basis are much more likely to feel overloaded. But as the frequency of bad

stress decreases, the share of overloaded workers drops and the likelihood of thriving rises.

Despite this relationship, the simple absence of bad

on-the-job stress doesn't guarantee that workers will thrive. Other factors, such as workplace discrimination, a lack of trusting relationships

with one's coworkers or leaders, or feelings of limited freedom and flexibility within the workplace might also be at play.

WORKPLACE STRESS, share of workers, by market

- **High:** every day
- **Moderate:** 2-6 times per week
- **Low stress:** once a week or less

Market	High stress	Moderate stress	Low stress	Market
Japan	14%	38%	48%	Japan
Thailand	12	28	60	Thailand
France	11	25	64	France
Argentina	11	27	62	Argentina
Taiwan	10	32	59	Taiwan
United States	9	27	64	United States
Germany	9	32	58	Germany
Australia	9	23	68	Australia
Poland	9	19	72	Poland
Czech Republic	9	23	69	Czech Republic
India	9	28	63	India
Italy	9	27	65	Italy
Mexico	9	35	56	Mexico
Canada	8	27	64	Canada
Chile	8	26	66	Chile
Saudi Arabia	8	26	66	Saudi Arabia
Brazil	8	20	72	Brazil
Philippines	7	29	63	Philippines
South Korea	7	31	61	South Korea
Peru	7	30	62	Peru
Nigeria	7	31	62	Nigeria
United Kingdom	7	25	68	United Kingdom
Spain	7	23	70	Spain
Sweden	6	25	69	Sweden
Vietnam	6	24	70	Vietnam
New Zealand	5	26	68	New Zealand
Switzerland	5	36	59	Switzerland
Egypt	5	35	60	Egypt
United Arab Emirates	5	38	57	United Arab Emirates
Netherlands	5	21	74	Netherlands
Indonesia	4	14	82	Indonesia
Singapore	4	28	68	Singapore
South Africa	3	18	79	South Africa
China	3	20	77	China

WORKPLACE STRESS, share of workers, by region

Region	High stress		Moderate stress		Low stress	
	Men	Women	Men	Women	Men	Women
North America	8%	10%	23%	31%	70%	59%
Asia-Pacific	7	8	26	27	66	65
Europe	6	9	25	27	69	64
Middle East / Africa	6	5	30	29	64	66
Latin America	7	10	25	31	68	59

OF ALL REGIONS WORKERS AGED:

27 to 39 in North America had the largest share of people experiencing **high stress**.

11%

27 to 39 in the Middle East / Africa had the smallest share of people experiencing **high stress**.

5%

18 to 26 in North America had the largest share of people experiencing **moderate stress**.

43%

55 to 64 in Europe and Latin America had the smallest share of people experiencing **moderate stress**.

18%

55 to 64 in Latin America had the largest share of people experiencing **low stress**.

75%

18 to 26 in North America had the smallest share of people experiencing **low stress**.

50%

SKILLS DEVELOPMENT

ENGAGEMENT

STRESS

MULTIPLE JOBS

DISCRIMINATION

CAREER BARRIERS

ARTIFICIAL INTELLIGENCE

PAY EQUITY

WORKPLACE MONITORING

MULTIPLE INCOMES, NOT ENOUGH MONEY

More than half of people who have two or more jobs said they're living paycheck to paycheck.



PEOPLE AT WORK

2025

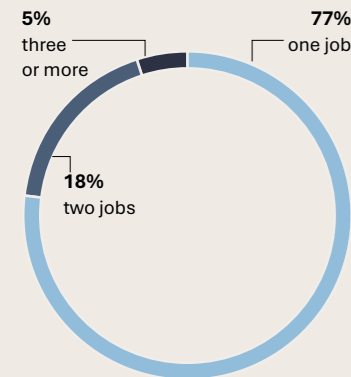
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MULTIPLE JOBS



MULTIPLE INCOMES, NOT ENOUGH MONEY

We asked:
Altogether, how many jobs do you have, excluding volunteer and other unpaid work?



Source: ADP Research Global Workforce Survey

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EVEN PEOPLE WITH MORE THAN ONE JOB ARE LIVING PAYCHECK TO PAYCHECK.

Global employment reached a **record high** in 2024, but workers in many parts of the world are still reeling from too little income and the high cost of living. More than half of workers worldwide said they were living paycheck to paycheck in 2024, according to the ADP Research Global Workforce Survey, which collected data from a stratified, random panel sample of nearly 38,000 working adults across 34 markets between July 23 and August 6. To make ends meet, many people take on extra work. Twenty-three percent of our survey respondents said they hold two or more jobs. In the Middle East / Africa region, the share soared to 34 percent.

THE PAYCHECK GAP

Even with all that work, 57 percent of our survey respondents said they struggled to pay the bills. Among people with a single job, 54 percent said they were living paycheck to paycheck. Taking on extra work doesn't necessarily close the pay gap. Among workers with two jobs, 59 percent said they lived paycheck-to-paycheck. And 61 percent of people with three or more jobs struggled to make ends meet.

While many people take on extra work to cover their expenses, many also had reasons that went beyond paying for necessities. Some said they were looking to build up savings; others wanted to pay for education, vacation, and other discretionary spending.

These motivations varied with age. Forty percent of multiple job holders younger than 40 said they took on extra work to beef up their experience, compared to only 27 percent of people 40 and older. And nearly a third of younger adults said they work to pay for school or job training, compared to 21 percent of older adults.

In fact, multiple job holders were just as likely as single job holders to say they had enough money to say they had enough money to cover their needs. But they were slightly more likely to say they could buy the things they wanted.

WHY DO YOU WORK MULTIPLE JOBS?

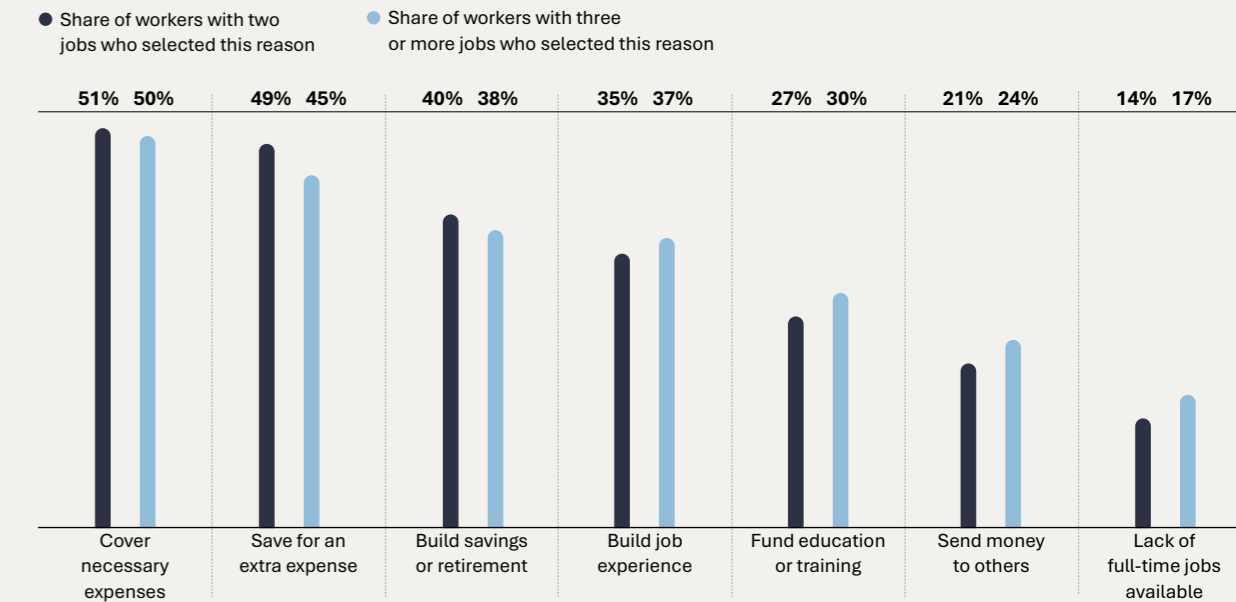
Survey respondents who told us they work more than one job were given the following question:

Which of the following options best describes your need to work multiple jobs?

Respondents were asked to select all options that applied to them.

Source: ADP Research Global Workforce Survey

Reasons for working multiple jobs, all respondents, 2024



THE TAKEAWAY

The rising cost of living, coming at a time of record employment, has led to a mixed outcome for worker well-being globally.

While people have different reasons for taking on extra work, holding two or more jobs can be a necessity in parts of the world where average wages are low relative to the cost of living.

Africa, Latin America and parts of Asia have large informal or cash economies where it's common for workers to make their living by cobbling together part-time and gig work.

These informal economies, by definition, are largely unregulated by governments and unmonitored by statistical agencies. As such,

they're characterized by reduced job stability and fewer worker protections.

In short, for the global workforce, bridging the gap in living costs isn't as simple as working more jobs. It requires a growing economy that can increase wages while keeping inflation in check.



PEOPLE AT WORK • MULTIPLE JOBS

LIVING PAYCHECK TO PAYCHECK,
all respondents
by market, 2024

Key
Share of workers living paycheck to paycheck

- 0-25%
- 26-50%
- 51-75%
- 76-100%

Region	Market	Share of workers living paycheck to paycheck
Latin America	Argentina	69%
Asia-Pacific	Australia	50%
Latin America	Brazil	54%
North America	Canada	56%
Latin America	Chile	70%
Asia-Pacific	China	31%
Europe	Czech Republic	44%
Middle East / Africa	Egypt	84%
Europe	France	43%
Europe	Germany	51%
Asia-Pacific	India	61%
Asia-Pacific	Indonesia	54%
Europe	Italy	62%
Asia-Pacific	Japan	29%
Latin America	Mexico	49%
Europe	Netherlands	42%
Asia-Pacific	New Zealand	57%
Middle East / Africa	Nigeria	56%
Latin America	Peru	73%
Asia-Pacific	Philippines	78%
Europe	Poland	46%
Middle East / Africa	Saudi Arabia	79%
Asia-Pacific	Singapore	60%
Middle East / Africa	South Africa	60%
Asia-Pacific	South Korea	18%
Europe	Spain	57%
Europe	Sweden	59%
Europe	Switzerland	57%
Asia-Pacific	Taiwan	30%
Asia-Pacific	Thailand	52%
Middle East / Africa	United Arab Emirates	72%
Europe	United Kingdom	49%
North America	United States	60%
Asia-Pacific	Vietnam	60%

REASONS FOR WORKING MULTIPLE JOBS,
all respondents
by market, 2024

Key
Share of workers who selected this reason

- 0-25%
- 26-50%
- 51-75%
- 76-100%

Market	Cover necessary expenses		Save for extra expenses		Build savings or retirement		Build job experience		Fund education or training		Send money to others		Lack of full-time jobs		Market
	Two jobs	Three jobs	Two jobs	Three jobs	Two jobs	Three jobs	Two jobs	Three jobs	Two jobs	Three jobs	Two jobs	Three jobs	Two jobs	Three jobs	
Argentina	66%	56%	44%	40%	29%	26%	26%	30%	27%	26%	11%	16%	12%	12%	Argentina
Australia	52	58	58	46	35	58	31	33	14	38	14	33	18	21	Australia
Brazil	60	58	51	44	42	47	22	36	14	31	14	27	8	22	Brazil
Canada	49	26	49	21	41	58	31	16	19	21	19	16	16	21	Canada
Chile	64	63	44	31	22	21	25	27	24	21	5	11	13	11	Chile
China	39	79	68	63	36	37	55	58	29	47	16	21	14	16	China
Czech Republic	40	45	46	32	39	26	34	16	24	6	10	10	16	10	Czech Republic
Egypt	61	63	63	57	29	39	48	70	43	46	26	30	13	20	Egypt
France	42	39	35	31	38	26	26	30	20	17	15	20	13	15	France
Germany	44	50	39	17	37	25	17	33	15	25	14	25	18	8	Germany
India	42	48	56	67	42	42	42	47	32	38	42	39	19	33	India
Indonesia	53	59	63	63	60	58	51	46	34	38	25	21	15	14	Indonesia
Italy	46	38	47	46	43	46	20	42	21	21	11	25	21	17	Italy
Japan	40	33	35	29	35	21	28	42	16	21	5	8	10	17	Japan
Mexico	59	39	44	39	33	39	28	44	20	20	16	11	8	19	Mexico
Netherlands	21	22	35	33	45	26	27	30	20	11	15	15	17	30	Netherlands
New Zealand	55	50	43	50	33	40	22	24	17	19	14	14	11	31	New Zealand
Nigeria	60	54	53	49	42	44	37	51	47	54	37	33	14	15	Nigeria
Peru	55	53	35	37	27	22	26	39	29	33	12	16	9	15	Peru
Philippines	67	67	60	64	43	41	39	30	39	45	29	21	13	20	Philippines
Poland	33	31	53	25	42	38	33	44	19	6	5	6	14	25	Poland
Saudi Arabia	43	33	50	44	33	33	49	33	29	32	35	36	15	20	Saudi Arabia
Singapore	35	43	37	36	34	24	27	26	33	29	28	31	17	31	Singapore
South Africa	55	66	56	58	42	51	29	39	35	52	23	39	10	13	South Africa
South Korea	58	43	43	36	47	29	29	21	13	21	5	14	12	14	South Korea
Spain	52	49	42	25	25	42	22	29	16	14	16	15	19	13	Spain
Sweden	46	49	53	54	37	38	25	21	16	21	11	5	11	21	Sweden
Switzerland	31	35	31	31	28	22	32	37	31	19	18	20	20	22	Switzerland
Taiwan	53	62	52	50	60	77	52	46	17	8	8	4	6	4	Taiwan
Thailand	58	54	61	54	61	49	49	40	21	21	30	22	7	7	Thailand
United Arab Emirates	28	23	38	39	27	31	36	33	31	22	31	44	23	23	United Arab Emirates
United Kingdom	47	44	51	44	49	22	28	39	24	28	26	28	16	0	United Kingdom
United States	53	53	37	47	34	36	23	14	19	28	21	22	17	19	United States
Vietnam	59	63	60	53	59	49	48	47	24	28	20	29	7	10	Vietnam

Source:
ADP Research
Global Workforce Survey

SKILLS DEVELOPMENT

ENGAGEMENT

STRESS

MULTIPLE JOBS

DISCRIMINATION

CAREER BARRIERS

ARTIFICIAL INTELLIGENCE

PAY EQUITY

WORKPLACE MONITORING

THE INSIDIOUS TOLL OF DISCRIMINATION

Workers who feel discriminated against are less productive and more likely to be looking for their next job.



PEOPLE
AT WORK

2025

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DISCRIMINATION



DISCRIMINATION IN THE WORKPLACE: THE COST TO EMPLOYERS

WORKERS WHO EXPERIENCE DISCRIMINATION ON THE JOB ARE LESS
CONNECTED TO THEIR EMPLOYERS. THEY'RE PROBABLY LESS PRODUCTIVE, TOO.

Contributors

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Hiring, supporting, and retaining talent can be difficult. Of the three parts of this puzzle, getting workers in the door might be the easiest to solve. Efforts to support and retain top workers, by contrast, can be undermined in quiet and insidious ways.

Workplace discrimination is one such element. It not only inflicts harm on individuals; it also can impose costs on companies through reduced productivity and higher employee turnover.

Between July 23 and August 6, 2024,

the ADP Research Global Workforce Survey collected data from a stratified, random panel sample of nearly 38,000 working adults in 34 markets.

The share of workers who say they experience discrimination at work has hovered around 19 percent for the past three years, but varies widely across and within regions in our sample.

Employers should pay heed. Workers who feel discriminated against are less likely to feel productive, and many are actively looking for new employment.

DEFINING DISCRIMINATION

Discrimination, in broad terms, is the act of treating similarly situated people or groups differently based on factors unrelated to their rights or abilities. It can mean different things to different people. The Global Workforce Survey doesn't define discrimination, nor does it ask respondents to elaborate on it. Workers can say they experience discrimination, but we can't know whether they've reported inappropriate behavior or have valid complaints. What we do know is how they feel, and people who feel discriminated against are less likely to feel productive and much more likely to be actively looking for a new job.

THE PREVALENCE OF DISCRIMINATION

The sentiment was strongest in the Middle East/ Africa region, where 33 percent of workers said they were experiencing discrimination in 2024. In Egypt, the United Arab Emirates, and Saudi Arabia, nearly half of workers reported feelings of discrimination.

Feelings of discrimination were less prevalent in Latin America, affecting only 1 in 10 workers. Several markets have seen a substantial change in discrimination sentiment over the last three years. There was little variation among markets in this region.

The United Arab Emirates had one of the largest groups of workers experiencing discrimination, at 46 percent, but that share has dropped 20 percentage points since 2022.

Singapore, too, has seen a large decline over the last three years, falling 19 points to 33 percent.

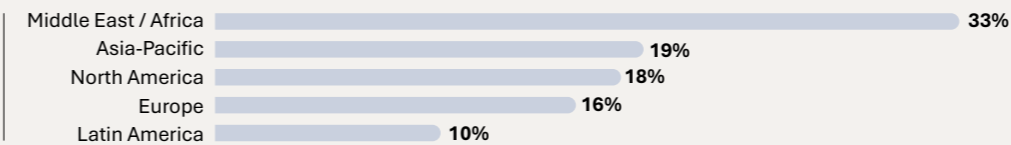
Conversely, the Netherlands has seen the largest increase in discrimination sentiment, with the share of affected workers rising from 10 percent in 2022 to 18 percent in 2024.

SHARE OF WORKERS EXPERIENCING DISCRIMINATION

Global share, 2022-'24



By region, 2024



By market, 2022-'24

	2022	'23	'24
Argentina	10%	7%	8%
Australia	12	11	15
Brazil	5	6	10
Canada	10	10	17
China	14	8	11
Czech Republic	12	15	15
Egypt	46	60	50
France	9	14	13
Germany	10	10	14
India	37	38	37
Italy	15	15	17
Japan	11	9	15
Mexico	6	8	10
Netherlands	10	12	18
Poland	11	9	15
Saudi Arabia	46	40	44
Singapore	52	25	33
South Africa	17	12	10
South Korea	21	18	22
Spain	12	12	15
Sweden	19	15	17
Taiwan	13	11	13
United Arab Emirates	66	50	46
United Kingdom	10	10	15
United States	13	10	19

By market, 2024

Middle East / Africa	Egypt	50%
Middle East / Africa	United Arab Emirates	46
Middle East / Africa	Saudi Arabia	44
Asia-Pacific	India	37
Asia-Pacific	Thailand	35
Asia-Pacific	Singapore	33
Europe	Switzerland	25
Asia-Pacific	South Korea	22
North America	United States	19
Asia-Pacific	Philippines	18
Europe	Netherlands	18
Europe	Sweden	17
Europe	Italy	17
North America	Canada	17
Middle East / Africa	Nigeria	16
Europe	Czech Republic	15
Asia-Pacific	Japan	15
Asia-Pacific	Australia	15
Europe	United Kingdom	15
Europe	Spain	15
Europe	Poland	15
Europe	Germany	14
Europe	France	13
Asia-Pacific	Taiwan	13
Asia-Pacific	Vietnam	13
Asia-Pacific	New Zealand	13
Latin America	Chile	11
Asia-Pacific	China	11
Latin America	Peru	11
Latin America	Mexico	10
Latin America	Brazil	10
Middle East / Africa	South Africa	10
Latin America	Argentina	8
Asia-Pacific	Indonesia	7

Source: ADP Research Global Workforce Survey



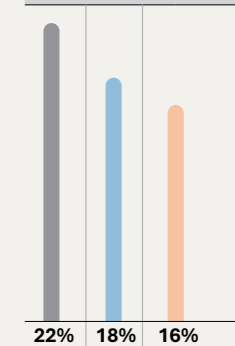
We asked:

Are you currently experiencing discrimination in the workplace?

By gender	
	Yes
Men	20%
Women	17

By minority status	
Minority	36%
Non-minority	14

By worker type



● **Knowledge worker**
Level of freedom to use their expertise to create something new.

● **Skilled task worker**
Level of expertise to solve similar problems each day.

● **Cycle worker**
Does similar repetitive tasks each day.

THE INDUSTRY WITH THE LARGEST SHARE OF WORKERS REPORTING DISCRIMINATION WAS MINING, QUARRYING, AND OIL & GAS EXTRACTION



Share of workers reporting discrimination in other industries:

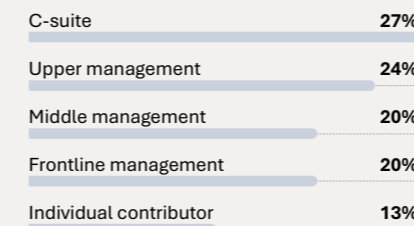
Finance and insurance	20%	Arts, entertainment, and recreation	16%	Transportation and warehousing	15%
Construction and related trades	20	Retail/wholesale trade	16	Health care and social assistance	15
Information	18	Technology services	16	Educational services	14
Manufacturing	18	Administrative/support services and waste management/remediation	15	Real estate and rental and leasing	14
Other personal services	17	Public administration and services	15	Professional, scientific, and technical services	12
Accommodation and food services	17				

WHO IS REPORTING DISCRIMINATION?

- Men were slightly more likely to say they're being discriminated against than women (20 percent compared to 17 percent).
- People who identify as a member of a racial or ethnic minority group in their market were far more likely to say they're experiencing discrimination (36 percent compared to 14 percent of those who don't identify).
- The higher a person's position within an organization, the more likely they were to report discrimination. More than 1 in 4 people in executive roles said they're experiencing discrimination, double the share of individual contributors (13 percent).
- The younger the worker, the more likely they were to say they're experiencing discrimination.

Share of workers experiencing discrimination

Organizational level, 2024



Source: ADP Research Global Workforce Survey

THE COST TO EMPLOYERS

With 19 percent of workers worldwide claiming to experience discrimination on the job, we wanted to investigate the potential cost to employers. To this end, we asked survey respondents to judge their own work output and respond to questions designed to measure their attachment to their employers. People who felt discriminated against were less likely to feel productive, and many said they were actively looking to jump to a new employer.

PRODUCTIVITY

We asked survey respondents to rate the quantity and quality of their work output and their commitment to getting the job done. Based on their answers, we sorted workers into three categories of productivity: High, moderate, and low.

Workers who say they're experiencing discrimination are much more likely to fall into the low-productivity category than those who don't.

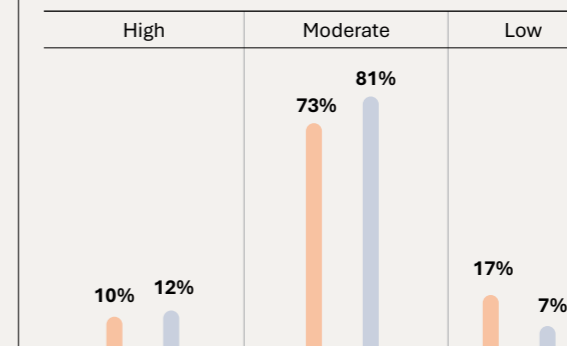
We expected to see a similar pattern at the other end of the productivity scale but didn't. In most markets, workers experiencing discrimination were just as likely to report high productivity as workers who weren't.

North America was a major outlier. Workers in Canada and the United States who said they're experiencing discrimination were 3.5 times less likely to report high productivity.

Differences between demographic groups were negligible. Workers experiencing discrimination, regardless of gender, age, or racial background, reported similar levels of low productivity.

● Experiencing discrimination ● Not experiencing discrimination

Discrimination by productivity, 2024



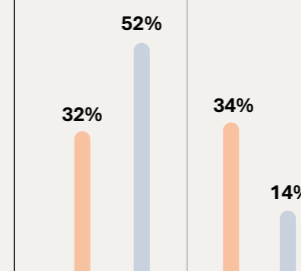
RETENTION

People who feel discriminated against were far more likely to be actively seeking a new job—34 percent compared to 14 percent. Once again, demographics and geography made little difference. When workers say they're experiencing discrimination on the job, regardless of their background, they're more likely to be headed for the exit.

Discrimination by intent to leave, 2024

No intent to leave my current company

Actively looking or interviewing for a new job



THE TAKEAWAY

Discrimination can manifest in myriad ways and for a variety of reasons, both personal and institutional. What we know is that people who feel discriminated against, regardless of their background, are less productive and more likely to be looking for their next job. Employers who can build a place where all workers feel like they belong might be rewarded with higher productivity, a more stable roster of employees, and an improved bottom line.

SKILLS DEVELOPMENT

ENGAGEMENT

STRESS

MULTIPLE JOBS

DISCRIMINATION

CAREER BARRIERS

ARTIFICIAL INTELLIGENCE

PAY EQUITY

WORKPLACE MONITORING

CAREER GROWTH ISN'T ALWAYS A STRAIGHT LINE

Workers who can see a clear path to opportunity are more likely to stick with their employers.



PEOPLE AT WORK

2025

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CAREER BARRIERS



ADVANCEMENT

19%

The largest share of respondents said their current job lacks any opportunity to advance at all.¹

15%

The share of respondents who believed strongly that they would need to change employers to get ahead.

Source: ADP Research Global Workforce Survey

THE PATH TO ADVANCEMENT ISN'T ALWAYS UP. OFTEN, IT'S OUT.

Contributors

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MANY AMBITIOUS EMPLOYEES SAY THEY LACK ADVANCEMENT OPPORTUNITIES AT WORK. IT'S ONE BIG REASON THEY QUIT.

Workers these days are adept at reading the landscape. When they quit their jobs, it's not always about moving to the next rung on the career ladder. Often, it's about finding a ladder with more rungs to climb. Career advancement isn't the straight line it once was. Between July 23 and August 6, 2024, we asked a random, stratified panel of nearly 38,000 workers across 34 markets to identify their biggest barriers to career advancement.

The largest share of survey respondents—19 percent—said their current job lacks any opportunity to advance at all.¹ And 15 percent believed strongly that they would need to change employers to get ahead.

This lack of opportunity was a particular problem in Latin America, where 25 percent of workers cited it as their biggest barrier to career advancement.

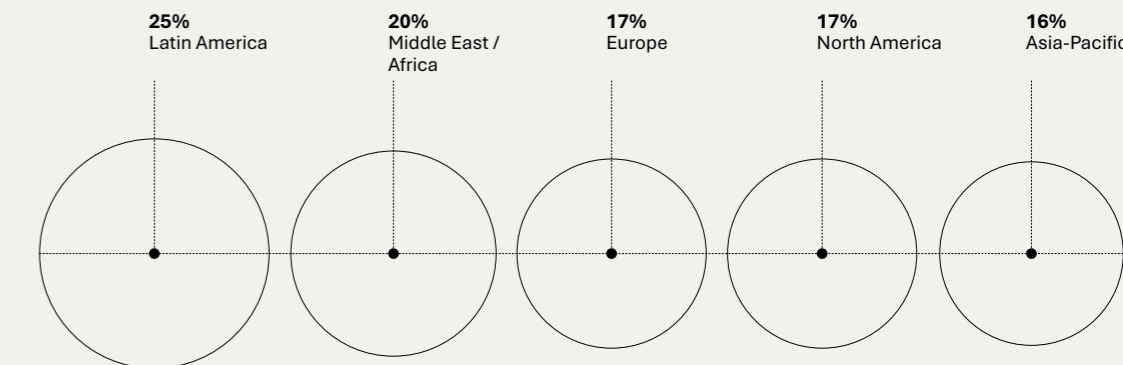
North America is the only region where a lack of opportunity wasn't the most-cited barrier. In this region, 19 percent of workers surveyed said they had a lack of desire to move up the career ladder; 17 percent cited a lack of opportunity.

Only 6 percent of respondents selected a lack of skill as their biggest barrier to advancement, putting this reason near the bottom of the list. This was surprising, given that only 24 percent of respondents said they were confident that they have the skills needed to advance to the next job level. Even fewer—17 percent—strongly agreed that their employers were investing in developing their skills.²

Perhaps having the skills needed for advancement becomes irrelevant to workers if they don't see a clear opportunity to use those proficiencies at their current place of employment.

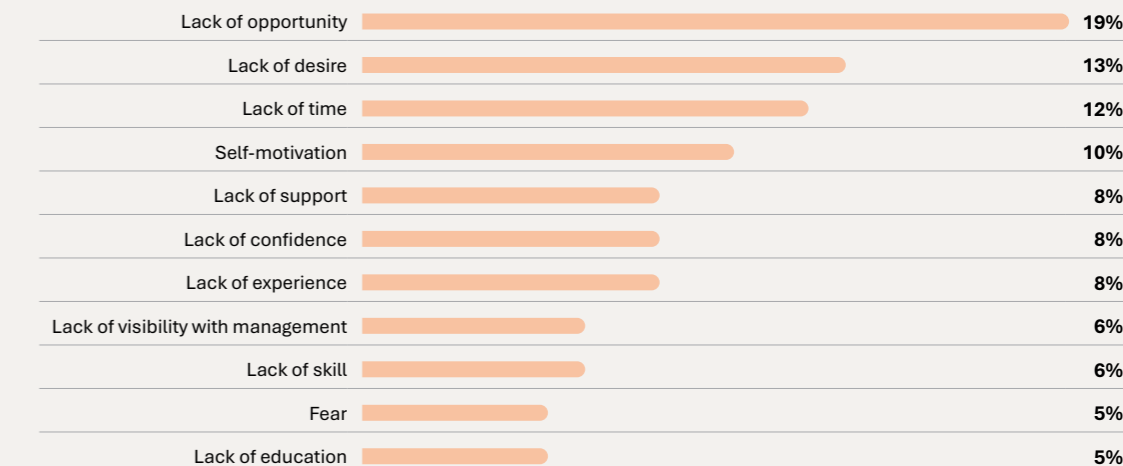
Continued, page 4

LACK OF OPPORTUNITY, by region
Share of workers who feel stymied by a lack of opportunity.



BARRIERS TO CAREER ADVANCEMENT

What's keeping you back? Many workers blamed their lack of advancement on their employers.



¹ We asked respondents this question: What do you see as the biggest barrier to advancing to the next level of your career? Respondents selected only one of the following options:

- Lack of opportunity
- Lack of skill
- Lack of visibility with management, etc.
- Fear
- Lack of education
- Lack of confidence
- Lack of experience
- Self-motivation
- Lack of time
- Lack of support (e.g., mentor, career champion, or advocate)
- Lack of desire (happy in my current job and don't want to change)

² For more information, see our article on [skills development](#) in People at Work 2025.

Source: ADP Research Global Workforce Survey



Continued from page 3

Workers who were confident that they had the necessary skills to advance and those who weren't both selected lack of opportunity as the most common barrier to career advancement.

For many workers, landing a promotion or advancing a career simply weren't top priorities. Nearly 1 in 3 gave a personal reason for not advancing, citing a lack of motivation or confidence. Thirteen percent said they were happy in their current role and had no desire to switch jobs.

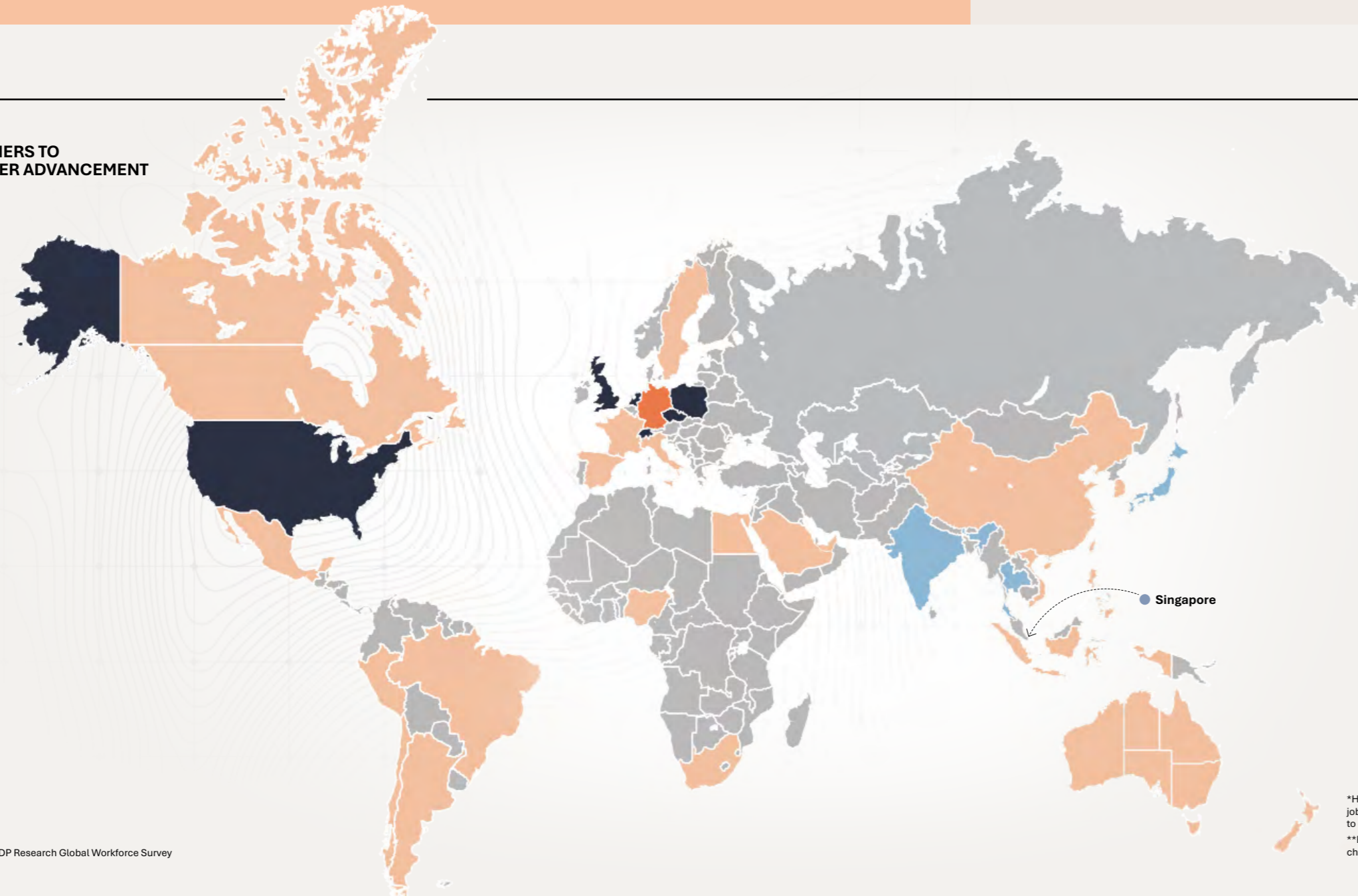
But for people who are keen on landing more responsibility or pay, that ambition influences other decisions. Workers who saw ways to advance in their current job cited that opportunity as their top reason for sticking with their employer. Opportunities for advancement ranked above a flexible work schedule, training and skills development, and even bonus pay when it came to reasons for staying with an employer.

25%

Egypt had the largest share of respondents who strongly agree that if they want to advance in their career, they will need to change companies. Japan had the smallest share, at 7%.

BARRIERS TO CAREER ADVANCEMENT

Source: ADP Research Global Workforce Survey



By market and reason

Most-selected barrier	Market
Lack of opportunity	Argentina
	Australia
	Brazil
	Canada
	Chile
	China
	Egypt
	France
	Indonesia
	Italy
	Mexico
	New Zealand
	Nigeria
	Peru
	Philippines
	Saudi Arabia
	South Africa
	South Korea
	Spain
Sweden	
Taiwan	
United Arab Emirates	
Vietnam	
Lack of desire*	Czech Republic
	Netherlands
	Poland
	Switzerland
	United Kingdom
Lack of support**	United States
	Singapore
Lack of time	Germany
	India
Self-motivation	Japan
	Thailand
	Thailand

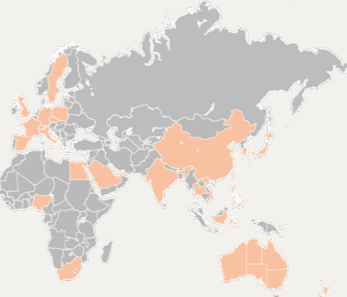
*Happy in my current job and do not want to change
 **E.g., mentor, career champion, or advocate

By region and reason

North America was the only region where 'Lack of desire' was the most-cited barrier.



• **Latin America**
 • **Asia-Pacific**
 • **Europe**
 • **Middle East / Africa**
 'Lack of opportunity' was the most-cited barrier to career advancement.



Lack of opportunity, by market

Argentina	26%
Nigeria	26
Brazil	26
South Africa	25
Chile	25
Mexico	24
Peru	24
Italy	23
Spain	23
New Zealand	21
China	20
Australia	20
France	20
Sweden	20
Indonesia	19
Canada	19
Egypt	19
Germany	17
Saudi Arabia	16
Vietnam	16
Switzerland	16
United Kingdom	16
India	16
Taiwan	16
United Arab Emirates	15
Czech Republic	15
Philippines	15
South Korea	14
United States	14
Thailand	14
Japan	13
Netherlands	13
Poland	12
Singapore	11



AGE AND OPPORTUNITY

Age, too, seems to influence how people feel about opportunities at work.

More than 20 percent of workers older than 40 cited a lack of opportunity as the biggest barrier to their advancement, compared to only 14 percent of people younger than 27.

These older workers are more likely to occupy higher-level jobs. Top managers were less preoccupied about the lack of opportunity than people lower on the company hierarchy, but not by much. Sixteen percent of executives and upper managers cited lack of opportunity as a barrier, compared to 18 percent of middle and frontline managers and 20 percent of individual contributors.

THE BUSINESS RISK

It should come as no surprise to managers that ambitious employees are more likely to be looking for new opportunities. Thirty-four percent of workers who said they can't find an opportunity to advance at their current employer said they were actively looking or interviewing for a new job. Among those who were confident they could advance, only 6 percent said they were actively looking.

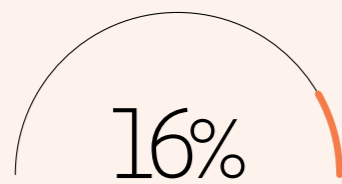
This risk to retention is accompanied by another negative for employers: lower productivity. Workers who feel strongly that they need to change employers to get ahead were 2.6 times less likely to consider themselves highly productive.

DO DEMOGRAPHICS MATTER?

We thought that perceived barriers to career advancement might vary based on demographics, but we found few stark differences.

Men and women in equal numbers cited lack of opportunity as their top barrier to advancement. Parents cited the same barriers as non-parents.

Workers at all sizes of employers—from the smallest businesses to the very large—cited similar barriers to advancement.



Among workers who identified as a racial or ethnic minority in their market, **16 percent** cited lack of opportunity as a barrier to advancement, compared to **20 percent** of non-minorities.

REASONS TO STAY

Among workers who see opportunities to advance within their current company, we asked people why they stay with their current employer.³

Top three reasons

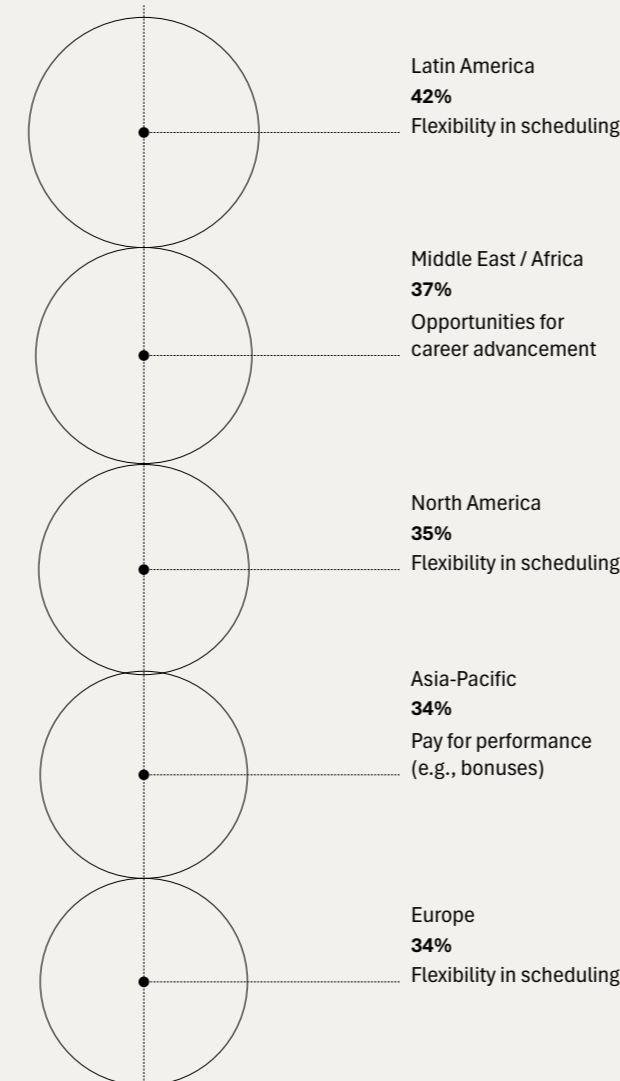


More reasons respondents choose to stay with their current employer:

Pay for performance (e.g., bonuses)	33%
Retirement benefits	20
Employer-sponsored health care	18
Telecommuting (work from home)	16
Free meals and snacks	8
Right to take industrial/labor action	6
Casual dress days	6
Paid time off to volunteer	6
Unlimited vacation	5
Maternity paid leave	5
On-site cafeteria	5
Tuition reimbursement	5
Employer child-care support	4
Paternity paid leave	4
Temporary assistance fund	3
On-site fitness center	3
Student loan debt assistance	3
On-site childcare	2

³ We asked survey participants to respond to this question: From the following list, which are the top three (perks) reasons you stay with your current employer? (Select up to three)

TOP PERK / REASON FOR STAYING WITH EMPLOYER, by region



EXIT DOOR

Share of workers who strongly agree they will need to change companies to advance in their careers, by market

Egypt	25%
India	24
Saudi Arabia	22
Chile	19
South Africa	19
Switzerland	18
Mexico	18
United Arab Emirates	17
United States	17
Thailand	17
Brazil	16
Nigeria	15
Philippines	15
Canada	15
New Zealand	14
Argentina	14
Sweden	14
Peru	14
Australia	13
United Kingdom	13
Singapore	13
Italy	13
Spain	13
Germany	13
China	13
France	12
Vietnam	12
Taiwan	11
South Korea	11
Netherlands	10
Czech Republic	10
Poland	10
Indonesia	9
Japan	7

THE TAKEAWAY

Career growth isn't only about having the necessary skills. It's also about the ability to see a clear path to the future. For some employees, the desired path might be upward, into higher ranks. For others, it might be lateral growth accompanied by new responsibilities. It's possible that many workers who feel they have no opportunity to advance simply lack visibility into what's available. Employers that highlight career development offerings and opportunities might see positive changes to worker sentiment.

SKILLS DEVELOPMENT

ENGAGEMENT

STRESS

MULTIPLE JOBS

DISCRIMINATION

CAREER BARRIERS

ARTIFICIAL INTELLIGENCE

PAY EQUITY

WORKPLACE MONITORING

THE GOOD, THE BAD, AND THE UNKNOWN

Workers aren't sure what to expect from artificial intelligence. Employers need to foster a clear understanding of its benefits.



PEOPLE AT WORK

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ARTIFICIAL
INTELLIGENCE



ARTIFICIAL INTELLIGENCE: THE GOOD, THE BAD, AND THE UNKNOWN

Contributors

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Source: ADP Research
Global Workforce Survey

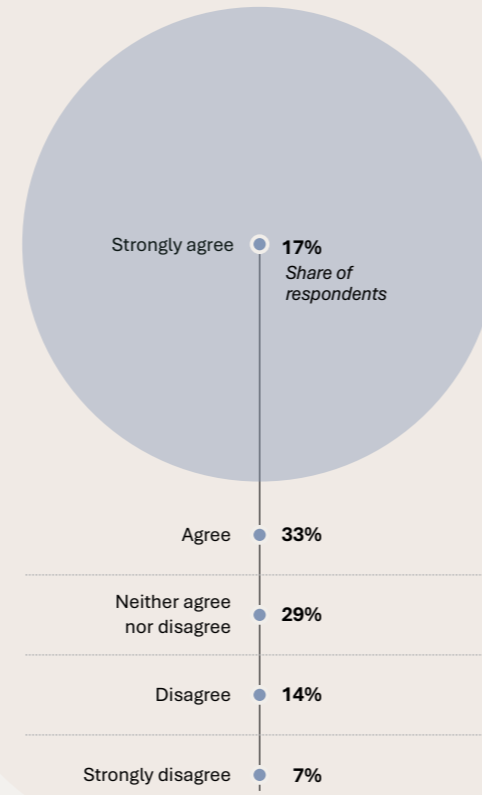
The transformative force of artificial intelligence promises significant benefit to some even as it gives rise to concern among many others. The technology’s potential to disrupt the workplace has prompted widespread discussion. This discourse, however, has largely overlooked the perspective of workers themselves.

We surveyed some 38,000 working adults on six continents between July 23 and August 6, 2024, to get a comprehensive view of how people feel about AI and how they think it might change their jobs. Our Global Workforce Survey sought respondents’ views on the positive contributions of AI, gauged their openness to and understanding of it, and asked them whether they feared

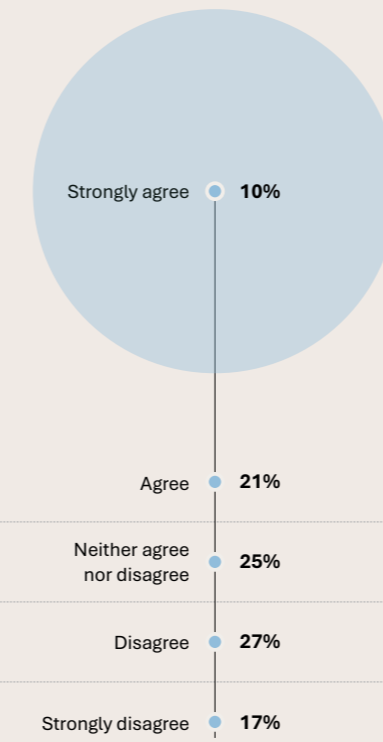
losing their jobs to the technology. No clear consensus emerged. While a plurality of respondents believed AI would have a positive impact on their work, feelings overall were mixed. As employers navigate the AI landscape, they’ll want to address employee concerns and foster a clear understanding of how the technology will be used in the workplace.

ANTICIPATED IMPACT OF AI, *by global workforce*

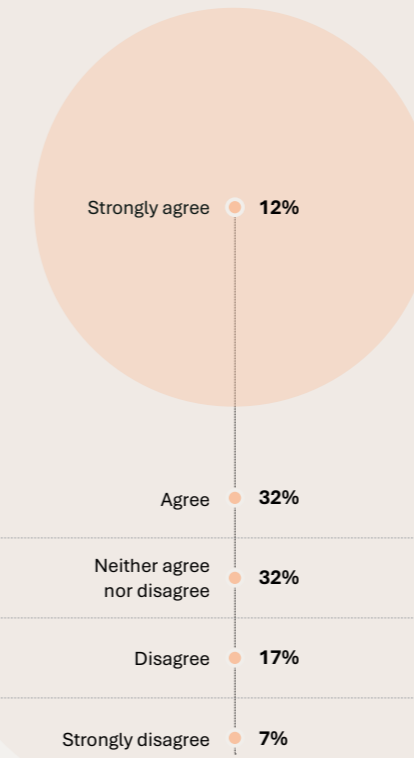
I believe AI will positively impact my job responsibilities in the next year.



I am scared that my job will be replaced by AI.



Currently, I have no idea about how AI will change my job.



ANTICIPATION, FEAR, AND INDIFFERENCE

It’s been said that AI won’t replace humans, but humans using AI will replace humans without it. We found that only 1 in 10 workers were scared the technology will cost them their jobs.

And while 17 percent of workers believed that AI would have a positive effect on their job, 27 percent of this group also said they feared being replaced by the technology. Among respondents who had more negative opinions of AI, or no opinion at all, only 7 percent were worried about being replaced.

In fact, the markets with the largest share of workers who have a positive outlook on AI—Egypt and India—also had the largest share of workers who feared being replaced by the technology.

In short, AI seems to trigger a contradictory set of emotions: excitement at its potential and fear of its ultimate impact.

Part of this contradiction could be attributed to anxiety about the unknown. Some markets in which a large share of workers feared being replaced by AI also had a large share who said they had no idea how AI will change their jobs.

Sweden and Japan had the smallest share of workers who were scared about AI. But they also had the smallest share of workers who believed its effect will be positive. This might add up to indifference, a sense that the technology will have little or no significant impact on their jobs.

AI seems to trigger a contradictory set of emotions: excitement at its potential and fear of its ultimate impact.



DEFINING THE TYPES OF WORKERS

Our survey gave workers three options for describing the work type that best fits their role:

✓ **Knowledge worker**
I have a level of freedom to use my expertise to create something new.

✓ **Skilled task worker**
I use a level of expertise to solve similar problems each day.

✓ **Cycle worker**
I do similar repetitive tasks each day.

We found distinct differences in AI sentiment by work type. **Knowledge workers**, a category that includes programmers, academics, and engineers, were by far the most likely to believe AI will have a positive impact on their jobs, but they also were the most worried about being replaced by AI. This group appears to be simultaneously hopeful about AI and wary of its consequences. Again, these responses might reflect a fear of the unknown. Knowledge workers also were the most likely to say they don't know what the future will bring.

SECTORAL DIFFERENCES

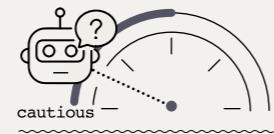
Worker sentiment about AI also showed differences depending on the sector.

Positive outlook on AI



- Technology services
- Finance and insurance
- Information

These sectors tend to be early adopters of innovative technology. And they prize efficiency and small gains in competitive advantage, both of which AI can enhance through automation, data analysis, and improved decision-making.



- Personal services
- Transportation and warehousing
- Health care and social assistance

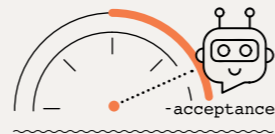
These three sectors rely heavily on human interaction and personalized services, which might contribute to worker apprehension. People in these jobs might worry that AI could compromise the quality of personal service, or they could perceive it as a threat to jobs or a disruption to established workflows. And because these sectors require a human touch, workers might be more cautious about AI as they weigh the complexities of introducing technology into highly relational environments.

Fear AI



- Mining
- Agriculture
- Utilities

Fear of AI might stem from the dual-edged nature of technological advancements. While AI presents significant opportunities for efficiency and innovation, it also necessitates careful consideration of its impact on the workforce, the environment, and current practices. It's worth noting that these three sectors also have the largest share of workers—about 15 percent—who say they have no idea how AI will change their jobs. This unknown might be fueling fear.



- Public administration/ service
- Educational services
- Health care and social assistance

Because many people who work in these sectors have hands-on jobs and deal directly with people on a daily basis, it's possible they believe that AI won't affect their jobs one way or another.

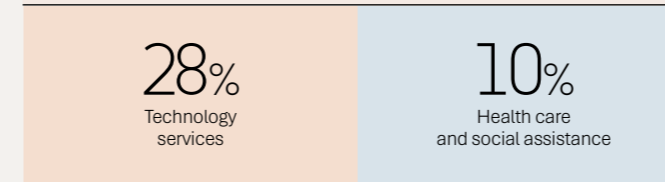
ANTICIPATED IMPACT OF AI, by sector

Workers in sectors that tend to be early adopters of technology were more likely to have a positive outlook on AI's potential impact on their jobs.

Share of workers who strongly agree

Sector with: ■ Largest share of workers who strongly agree ■ Smallest share of workers who strongly agree

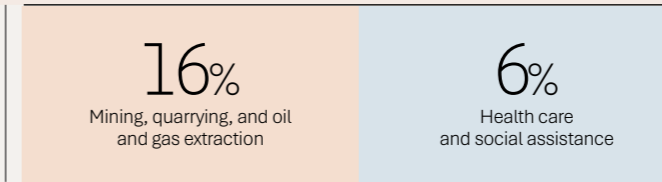
I believe AI will positively impact my job



Additional sector sentiment

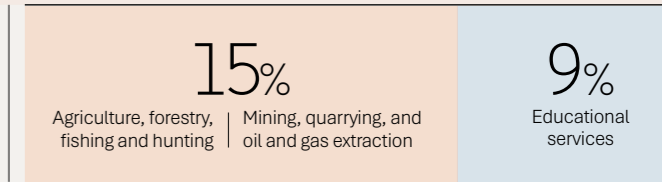
Finance and insurance	25%
Information	20
Mining, quarrying, and oil and gas extraction	18
Agriculture, forestry, fishing and hunting	18
Manufacturing	17
Real estate and rental and leasing	17
Utilities	17
Construction and related trades	16
Professional, scientific, and technical services	15
Retail/wholesale trade	15
Educational services	15
Administrative/support services and waste management/remediation	14
Arts, entertainment, and recreation	14
Public administration/service	13
Accommodation and food services	13
Other personal services	12
Transportation & warehousing	11

I am scared my job will be replaced by AI



Utilities	15%
Agriculture, forestry, fishing and hunting	14
Technology services	12
Finance and insurance	12
Information	12
Retail/wholesale trade	10
Manufacturing	10
Construction and related trades	10
Administrative/support services and waste management/remediation	9
Arts, entertainment, and recreation	9
Other personal services	9
Accommodation and food services	9
Real estate and rental and leasing	9
Transportation & warehousing	8
Professional, scientific, and technical services	8
Public administration/service	7
Educational services	7

I have no idea how AI will change my job



Utilities	14%
Information	13
Finance and insurance	13
Other personal services	12
Public administration/service	12
Technology services	12
Construction and related trades	12
Administrative/support services and waste management/remediation	12
Arts, entertainment, and recreation	11
Retail/wholesale trade	11
Health care and social assistance	11
Accommodation and food services	11
Manufacturing	11
Transportation & warehousing	11
Real estate and rental and leasing	10
Professional, scientific, and technical services	10

ANTICIPATED IMPACT OF AI, by work type.

Share of workers who strongly agree

Worker type	I believe AI will positively impact my job.	I am scared my job will be replaced by AI.	I have no idea how AI will change my job.
Knowledge	24%	13%	14%
Skilled task	13	8	9
Cycle	8	8	11

Source: ADP Research Global Workforce Survey

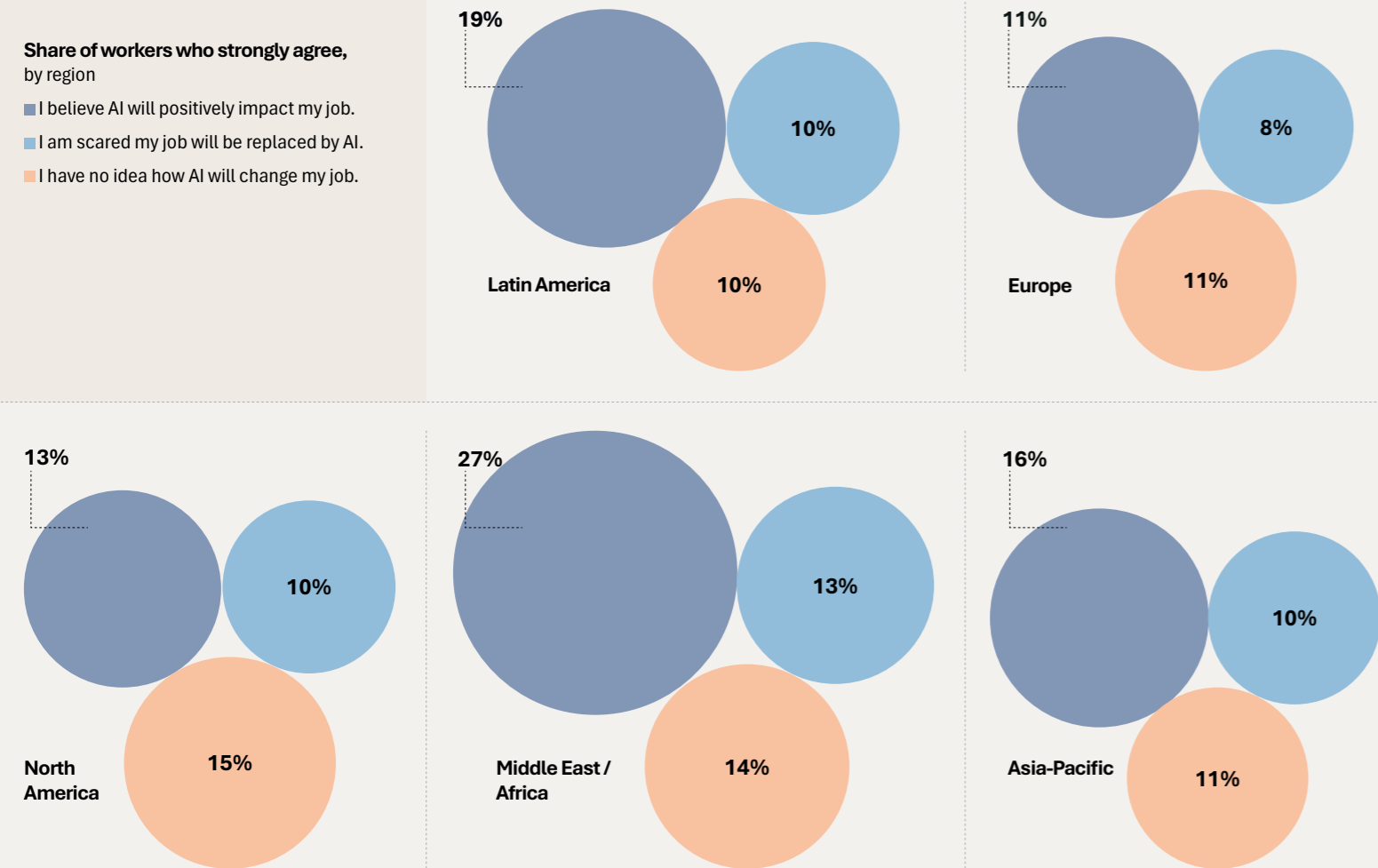


ANTICIPATED IMPACT OF AI

Workers in Egypt, India, and Nigeria were most likely to have a positive outlook on the potential impact of AI on their jobs. All three markets have implemented national strategies that might be contributing to positive worker sentiment.

Share of workers who strongly agree, by region

- I believe AI will positively impact my job.
- I am scared my job will be replaced by AI.
- I have no idea how AI will change my job.



Share of workers who strongly agree, by market

I believe AI will positively impact my job

Egypt	36%
India	34
Nigeria	32
Brazil	26
South Africa	25
Saudi Arabia	23
China	22
Vietnam	22
Mexico	22
Thailand	22
Philippines	19
Switzerland	19
Indonesia	19
United Arab Emirates	18
Argentina	17
Peru	16
Chile	16
Singapore	16
United States	15
United Kingdom	14
Spain	13
Canada	12
France	11
Germany	11
Taiwan	11
Australia	11
Netherlands	11
New Zealand	10
Poland	9
Italy	8
South Korea	8
Czech Republic	7
Sweden	6
Japan	4

I am scared my job will be replaced by AI

Egypt	22%
India	17
Saudi Arabia	15
Philippines	15
Switzerland	13
United States	13
Thailand	12
Mexico	12
China	11
Singapore	11
United Arab Emirates	11
Brazil	10
Peru	10
Spain	10
Vietnam	10
Germany	9
Australia	9
United Kingdom	9
Indonesia	9
South Africa	9
Chile	9
Canada	8
Nigeria	8
France	8
Italy	8
South Korea	8
New Zealand	8
Poland	7
Czech Republic	7
Argentina	7
Taiwan	7
Netherlands	7
Sweden	4
Japan	4

I have no idea how AI will change my job

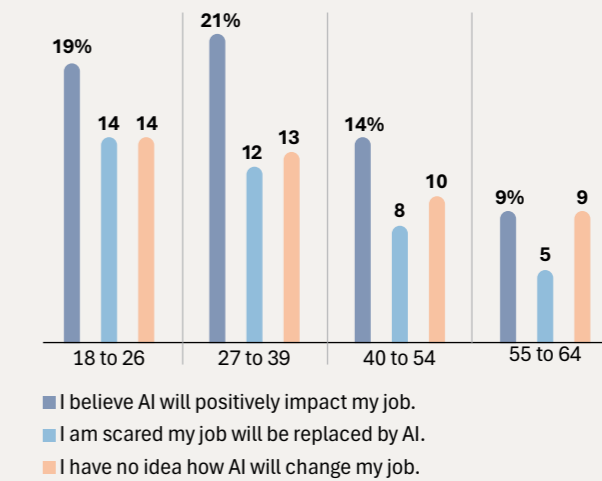
Egypt	21%
Singapore	19
India	18
United States	17
Switzerland	16
Saudi Arabia	16
Germany	15
Canada	14
United Arab Emirates	13
Thailand	12
Philippines	12
United Kingdom	12
Mexico	12
Brazil	12
France	11
Vietnam	11
Czech Republic	11
Netherlands	11
China	11
Sweden	11
Spain	10
Australia	10
Nigeria	10
Poland	10
New Zealand	9
Chile	9
South Africa	9
Italy	9
South Korea	8
Peru	8
Japan	8
Argentina	8
Indonesia	8
Taiwan	7

AGE PLAYS A ROLE

The younger the worker, the more likely they were to show both optimism and concern about AI. Workers who are early in their careers might be considering how advancements in AI technology might affect them in the long term.

Late-career workers, especially those 55 and older, seemed to show the most indifference toward AI. They might feel that AI will have little impact on the years they have remaining in their jobs.

ANTICIPATED IMPACT OF AI, by age group
Share of workers who strongly agree



Source: ADP Research Global Workforce Survey

¹We asked survey respondents the following question: In the last year, how often have you experienced (bad) stress at work? Respondents who said they experienced bad stress every day were categorized as high stress. Those who said two to six times per week were categorized as moderate stress. Those who said once a week or less were categorized as low stress.

THE TAKEAWAY

Fear can lead to heightened stress in workers.

Respondents who were scared about being replaced by technology were twice as likely to experience high stress at work compared to those who were less worried.¹ Even workers who have no idea how AI will change their jobs were nearly twice as likely to be highly stressed. And workers who fear for their jobs are more likely to be looking for employment elsewhere.

More than 30 percent of workers who felt strongly that they could be replaced by AI were actively looking or interviewing for a new job, compared to only 16 percent of respondents who were less scared.

As employers navigate the transformative landscape of AI, it will be crucial for them to address employee concerns and foster a clear understanding of the technology's benefits. Communication can contribute to a supportive work environment that minimizes worker fear and maximizes the potential of AI as a collaborative workplace tool.

SKILLS DEVELOPMENT

ENGAGEMENT

STRESS

MULTIPLE JOBS

DISCRIMINATION

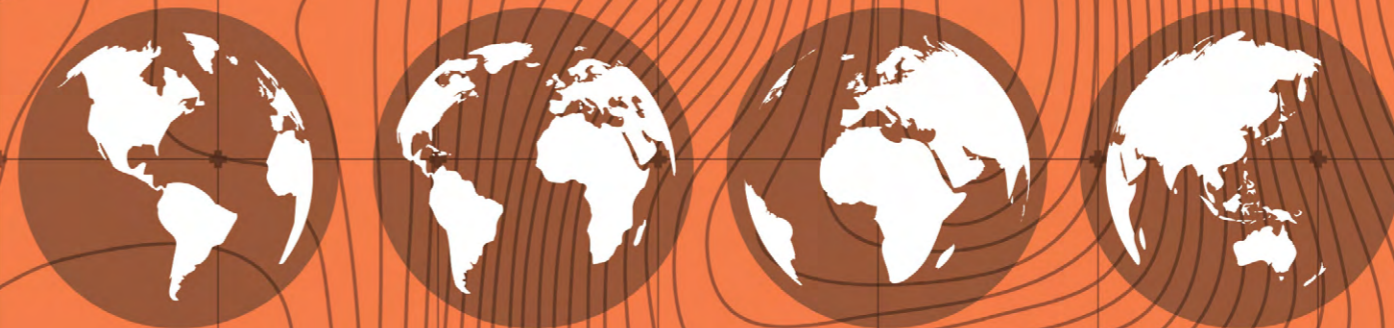
CAREER BARRIERS

ARTIFICIAL INTELLIGENCE

PAY EQUITY

WORKPLACE MONITORING

PEOPLE FEEL BETTER ABOUT THEIR PAY
But sentiment gaps about fairness persist,
especially between men and women.



PEOPLE AT WORK

2025

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PAY EQUITY



PEOPLE FEEL BETTER ABOUT THEIR PAY, BUT THEY'RE TROUBLED BY A SENSE OF UNFAIRNESS

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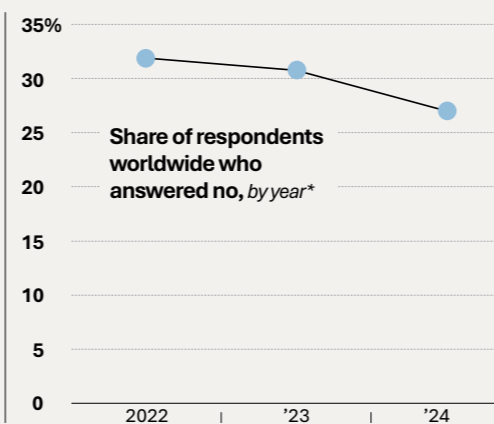
Fewer workers had gripes about their pay in 2024. But while the share of people who feel unfairly paid fell from a year earlier, sentiment gaps about fairness persisted, especially between men and women.

In 2024, 27 percent of workers felt that their pay wasn't fair, down from 31 percent in 2023. Despite this improvement, 28 percent of women felt their pay wasn't fair in 2024, compared to 23 percent of men. Age, managerial level, industry, and type of work also figured into how workers feel about their pay. The ADP Research Global Workforce Survey collected data from a stratified, random panel sample of nearly 38,000 working adults across 34 markets on six continents between July 23 and August 6, 2024.

We asked people to answer yes or no to this question: My pay is fair for the work I do. In the 25 markets we've surveyed annually since 2022, the share of workers who feel fairly paid has risen for the past two years. While this survey didn't capture respondents' actual pay—or how their employers feel about it—it did show that worker sentiment on pay fairness needs improvement. When people feel that they're paid fairly, their employers are more likely to have engaged and productive teams, and lower employee turnover.

MY PAY IS FAIR FOR THE WORK I DO
 Since 2022, the share of workers who think they're unfairly paid has fallen.

*Includes only markets with annual data since 2022.
 Source: ADP Research Global Workforce Survey



GENDER

Gender is a key differentiator when it comes to how workers feel about their pay. Although the share of people who feel unfairly paid is trending downward, the gender gap persists. Worldwide, 28 percent of women surveyed said they are paid unfairly, compared to 23 percent of men. In 15 of the 34 markets we surveyed, more than 30 percent of women said they are paid unfairly. Men reached the 30 percent threshold in only five markets. This gender gap gets worse as people get older and farther along in their careers. Four industries in particular stood out when it came to pay and gender: Mining, education, health care, and accommodation and food services. Education and health care, two industries heavily populated by women, also had the largest share of women who felt unfairly paid. But many men in these industries said they felt unfairly paid, too.

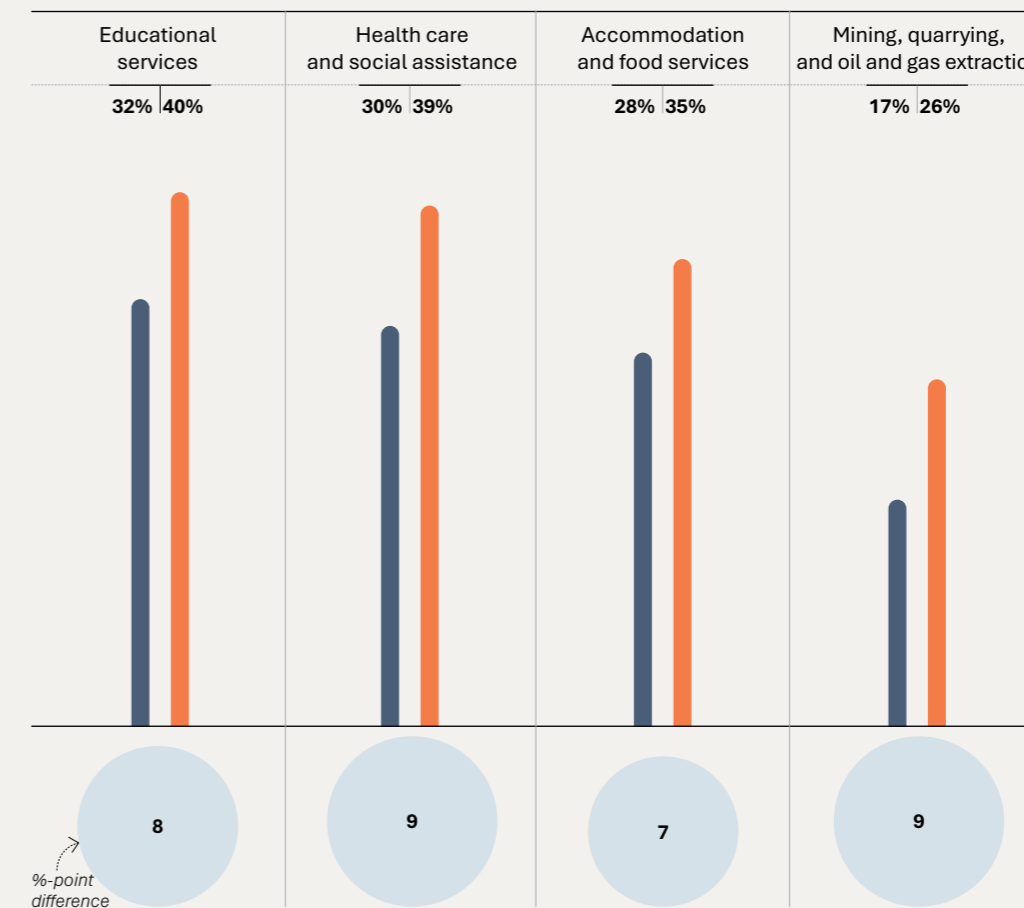
28%

The percentage of women surveyed worldwide who said they are paid unfairly.

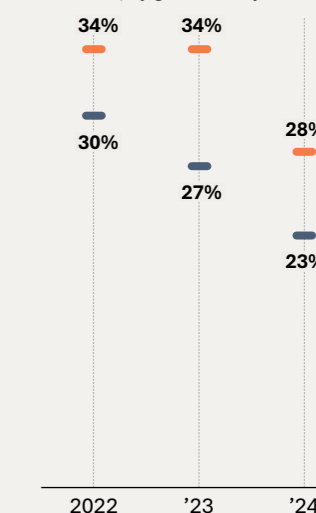
MY PAY IS FAIR FOR THE WORK I DO

● Men ● Women

Share of workers who answered no, by year, gender, age and industry



Share of workers who said no, by gender and year



Share of respondents worldwide who answered no, by gender and age

Age group	Men	Women
18 to 26	18%	23%
27 to 39	21%	26%
40 to 54	27%	33%
55 to 64	28%	34%



MANAGERIAL LEVEL

Pay tends to increase with added responsibility, and we found that more people at higher levels in the corporate hierarchy were satisfied with their pay.

C-suite (13%) and upper management (15%) employees were much less likely

than lower-level employees (34%) to feel their pay is unfair.

Even in these high-ranking jobs, women still were more likely than men to say their pay is unfair, but the gender gap did narrow for workers in management.

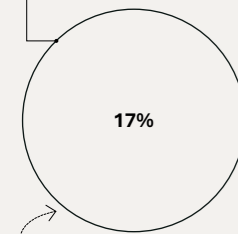
MY PAY IS FAIR FOR THE WORK I DO, by type of worker¹

The more complex the job, the smaller the share of workers who feel unfairly paid.

Share of workers who say no

Knowledge worker

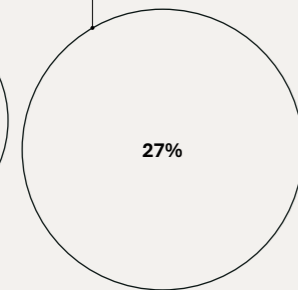
I have a level of freedom to use my expertise to create something new.



Least likely to say their pay is unfair

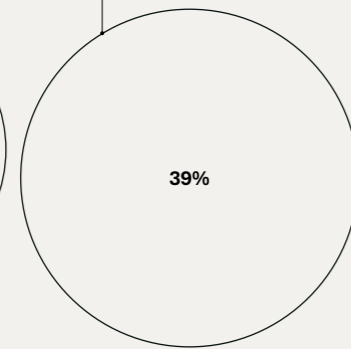
Skilled task worker

I use a level of expertise to solve similar problems each day.

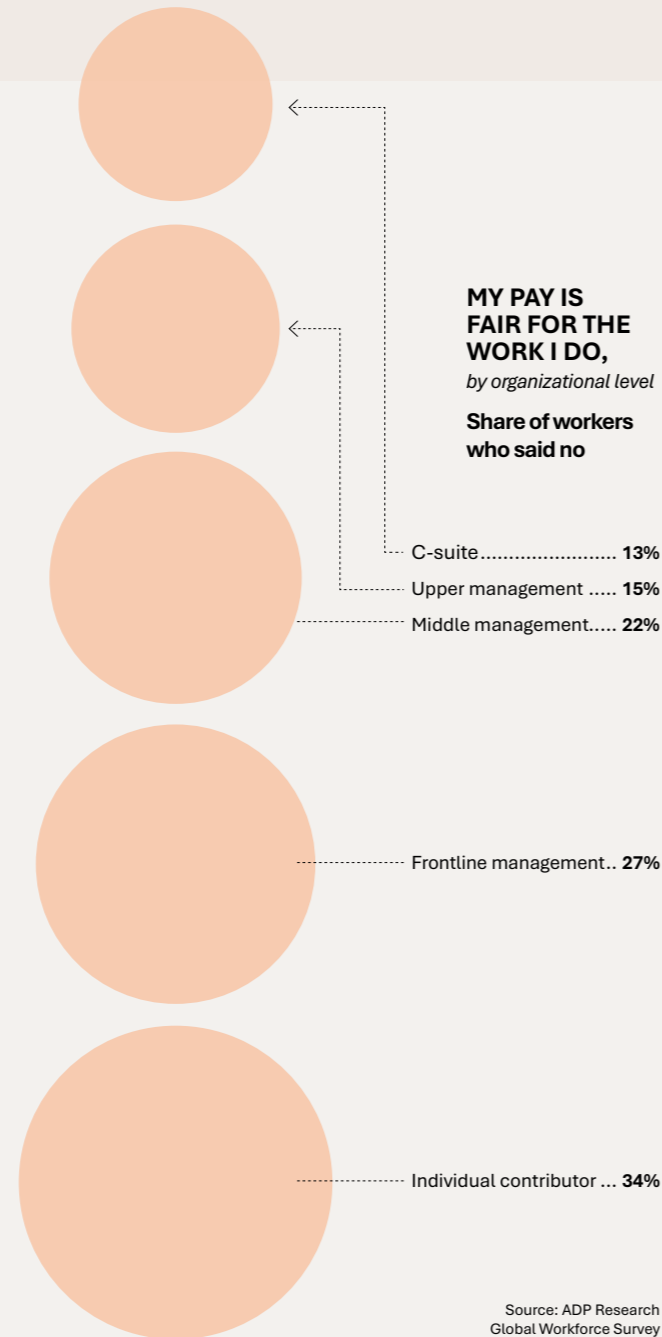


Cycle worker

I do similar repetitive tasks each day.



¹ Respondents were asked to choose the work type that best fit their role



MY PAY IS FAIR FOR THE WORK I DO, by organizational level

Share of workers who said no

THE TAKEAWAY

Workers who feel unfairly paid are less likely to be engaged on the job, are less likely to be resilient, are less likely to trust employer leadership, and are more likely to quit.²

In fact, people who received an increase in pay in the last 12 months were more than 2.3 times more likely to say their pay was fair than those who didn't.

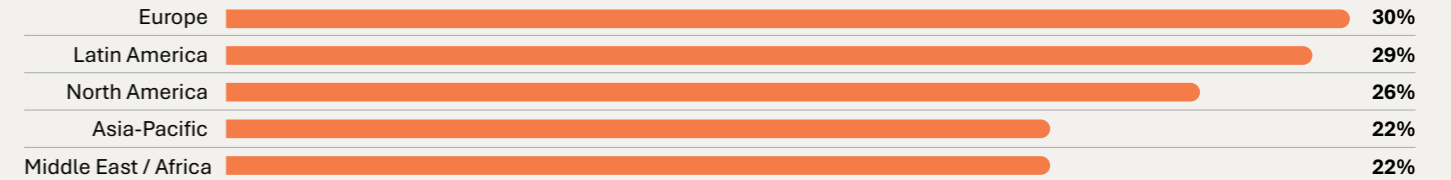
² We define engagement as the emotional state of mind that causes people to do their best work, sustainably. More information on how we measure engagement can be found in our [Definitive Series: Employee Engagement](#) report. We define resilience as the capacity of an individual to withstand, bounce back from, and work through challenging circumstances or events at work. More information on how we measure resilience can be found in our [Workplace Resilience Study](#).

Source: ADP Research Global Workforce Survey

MY PAY IS FAIR FOR THE WORK I DO, by region

The share of workers dissatisfied with their pay is lowest in India, at 11 percent, and highest in South Korea, at 45 percent.

Share of workers who say no



SHARE OF WORKERS WHO SAY THEIR PAY IS NOT FAIR FOR THE WORK THEY DO

By market

South Korea	45%	Nigeria	25%
Sweden	39	Peru	25
Japan	37	Australia	25
France	37	Mexico	24
Argentina	36	Germany	24
Italy	36	South Africa	23
Chile	32	Netherlands	22
Czech Republic	32	Switzerland	21
Poland	31	Philippines	20
Taiwan	31	Egypt	18
Spain	30	Saudi Arabia	18
Brazil	29	Singapore	17
New Zealand	28	China	17
United States	26	Indonesia	13
United Kingdom	26	Vietnam	13
Canada	26	Thailand	12
United Arab Emirates	26	India	11

By gender

	Men	Women		Men	Women
Argentina	32%	42%	Nigeria	27%	24%
Australia	20	29	Peru	25	25
Brazil	27	32	Philippines	18	23
Canada	20	31	Poland	25	40
Chile	29	36	Saudi Arabia	20	14
China	16	17	Singapore	12	18
Czech Republic	27	37	South Africa	24	21
Egypt	22	10	South Korea	45	44
France	32	39	Spain	27	33
Germany	23	26	Sweden	30	45
India	12	9	Switzerland	20	23
Indonesia	13	13	Taiwan	28	35
Italy	31	40	Thailand	9	16
Japan	36	38	United Arab Emirates	24	27
Mexico	25	24	United Kingdom	20	31
Netherlands	17	26	United States	21	30
New Zealand	23	31	Vietnam	14	11

SKILLS DEVELOPMENT

ENGAGEMENT

STRESS

MULTIPLE JOBS

DISCRIMINATION

CAREER BARRIERS

ARTIFICIAL INTELLIGENCE

PAY EQUITY

WORKPLACE MONITORING

WORKERS FEEL WATCHED

Even the suspicion of workplace monitoring can coincide with lower productivity.



PEOPLE AT WORK

2025

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WORKPLACE
MONITORING



EMPLOYER EFFORTS TO TRACK PRODUCTIVITY MIGHT BE BACKFIRING

Contributors
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Those keystroke trackers and mouse monitors that keep tabs on employee activity might be backfiring. When ADP Research asked nearly 38,000 workers in 34 markets about being watched at work, nearly a third said that their employers constantly watched them on the job. And the group that felt watched also reported being less productive and more stressed on the job.

¹More information about our research on stress in the workplace can be found in *Today at Work Issue 4*.

Before the pandemic, when most work was done at the office or job site, it was relatively straightforward for employers to keep tabs on their employees. Just showing up each day could be considered a proxy for productivity. When remote work took hold, it changed how organizations interacted with the employees they no longer could see in person. Demand rose for

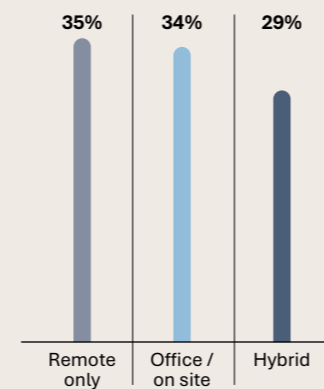
software that could track keystrokes, grab computer screens, and monitor mouse movements. But these efforts to ensure work is getting done instead might be reducing productivity and increasing employee stress. Years of research have established that stressed and unproductive workers are antithetical to any company's bottom line.¹

WHAT WE DIDN'T FIND

Perhaps one of our biggest worker sentiment findings is what we didn't find. We asked people to agree or disagree with this statement: "I am constantly being watched by my employer." We had expected to see substantially different responses based on respondents' work location. Instead, we were surprised to find only a narrow margin of difference between those who work on site every day and those who don't. In other words, remote workers didn't seem to feel more watched than their on-site colleagues.

SHARE OF WORKERS WHO SAY THEY'RE BEING WATCHED, by work location

I am constantly being watched by my employer.

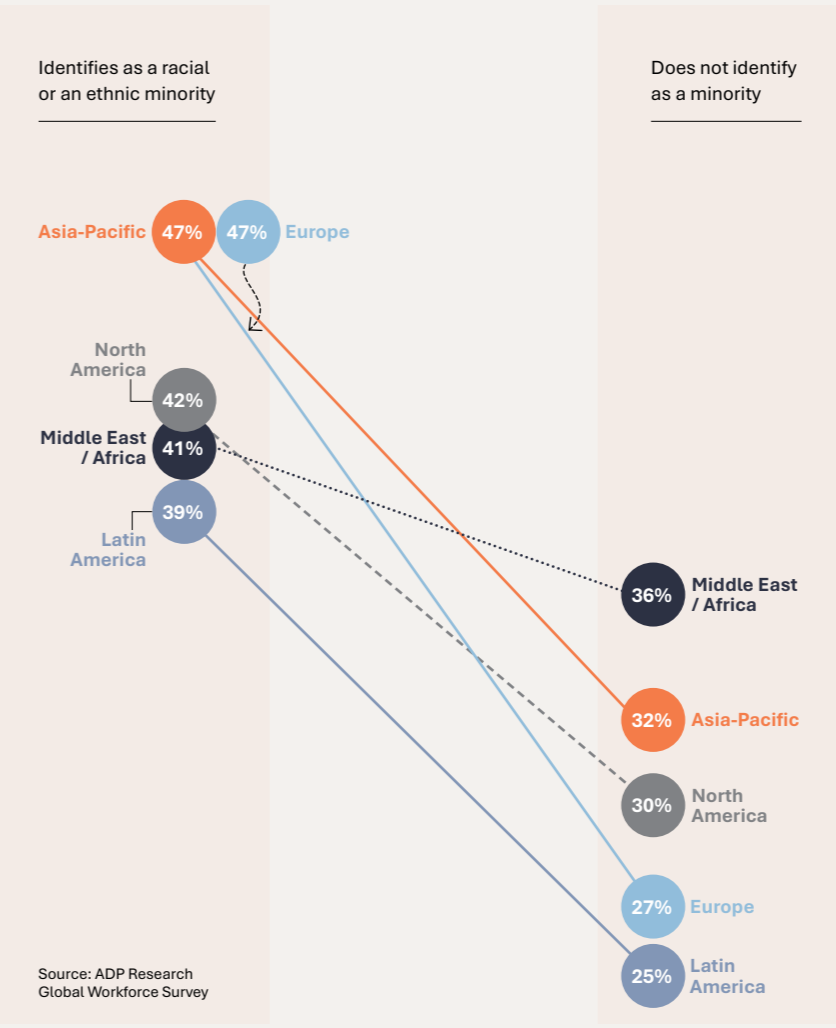


WHAT WE DID FIND

Among regions, the Middle East/Africa had the largest share of workers who said they were being watched, at 37 percent, but this share varied widely by market. More than 40 percent of workers in Egypt, Nigeria, and Saudi Arabia felt watched, compared to only 21 percent in South Africa. Asia-Pacific showed a similar variance. India, at 64 percent, had the largest share, worldwide, of workers who said they were being watched. Japan had the smallest share, at 21 percent. Racial and ethnic identity seemed to play a role in our workplace monitoring results. People who identify as a racial or an ethnic minority in their market were much more likely to say they were being watched (44%) than those who don't (30%). Europe had the largest disparity of any region. There was a 20 percentage-point difference between self-identified minorities and non-minorities when it came to workplace monitoring. In Europe, 61 percent of workers in Italy who identify as a racial or an ethnic minority said they were being watched, compared to only 24 percent of workers there who don't identify as a minority. Of all the markets we surveyed, this was by far the largest difference between racial minorities and non-minorities.

SHARE OF WORKERS WHO SAY THEY'RE BEING WATCHED, by racial or ethnic identification

I am constantly being watched by my employer, share of workers who agree



Share of workers who agree, by market and racial or ethnic identification

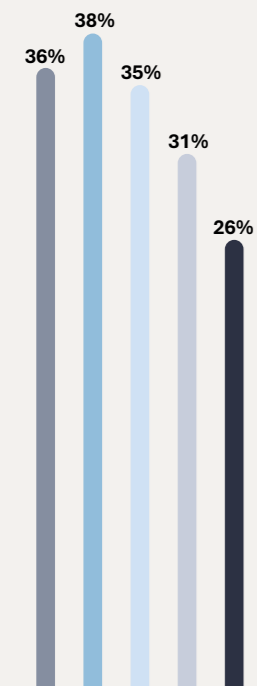
Market	Identifies as a racial or an ethnic minority	Does not identify as a minority
India	76%	58%
Thailand	62	42
Italy	61	24
Egypt	58	39
Switzerland	56	34
Nigeria	56	40
China	53	26
Saudi Arabia	52	38
Germany	51	24
Czech Republic	49	29
Poland	49	35
Philippines	49	37
Singapore	46	40
Netherlands	46	23
United Kingdom	44	25
Spain	43	27
United States	43	30
Mexico	41	26
Canada	41	30
Brazil	41	29
France	41	26
Australia	39	31
Peru	39	23
Taiwan	38	23
United Arab Emirates	36	37
Chile	36	22
Indonesia	35	31
Vietnam	34	26
New Zealand	33	28
Sweden	32	23
South Korea	31	24
Argentina	31	23
Japan	29	21
South Africa	24	19



SHARE OF WORKERS WHO SAY THEY'RE BEING WATCHED, by managerial level

- C-suite
- Upper management
- Middle management
- Frontline management
- Individual contributor

Share who agree



Source: ADP Research Global Workforce Survey

UNINTENDED CONSEQUENCES

Employers that monitor workers to ensure that they're doing their jobs might in fact be eroding productivity.

Workers who said they were watched were nearly three times less likely to report a high level of productivity compared to those who didn't say they were watched. In fact, workers who felt watched were almost four times more likely to report the lowest level of productivity.

Workers who said they were watched also had higher levels of stress. They were more than three times more likely to say they experience negative stress every day. More stress tends to align with lower productivity and higher turnover.

Thirty-seven percent of workers who experience daily, negative stress said they were actively looking or interviewing for a new job, compared to only 13 percent of workers who said they experience bad stress once a week or less.²

²See *Today at Work, Issue 4*, for more information on the relationship between stress, worker productivity, and worker intent to leave.

Other findings:

- ✓ Men were slightly more likely to say they are constantly watched (34%) than women (30%).
- ✓ Workers under 40 were more likely to feel watched (37%) than those 40 and older (27%).
- ✓ Knowledge workers (35%) were more likely than skilled-task or cycle workers (30%) to say they are watched.
- ✓ Managers and executives were much more likely than other workers to say they are constantly watched.

THE TAKEAWAY

What employers measure should matter. In shift or cycle work, for example, workers should be in control of what's measured. At a restaurant, the number of orders taken in an hour isn't necessarily up to the server. It depends on the number of guests and what they want. If there are no customers, there are no orders.

A better metric might be the time it takes to complete each order. That's in the control of the server and their team. Employers who measure performance should make sure they're focused on the indicators that are most informative. This information should be communicated to employees.

Employers can put worried workers at ease by communicating expectations openly and frequently.

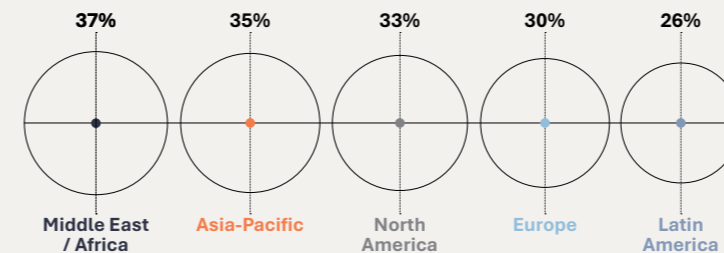
It's important to reiterate that our survey measures worker sentiment. We have no way of knowing if respondents are actually being monitored by their employers. Some employees might be making unfounded assumptions. The bottom line, though, is that when this feeling is present, the relationship to negative

outcomes is quite strong. Employers can put worried workers at ease by communicating expectations openly and frequently. Survey respondents who said they clearly understand what's expected of them at work are 3.7 times more likely to report being highly productive than those who don't; our research has shown. If productivity

concerns arise, blanket monitoring policies might do more harm than good. Instead, employers could be well advised to address specific concerns directly with individual employees as needed. This more granular approach could go a long way toward creating an environment where people feel less stressed and more equipped to do their best work each day.

SHARE OF WORKERS WHO SAY THEY ARE BEING WATCHED

Share of workers who agree, By region



Share of workers who agree, By market

India	64%	China	29%
Thailand	46	Spain	29
Nigeria	46	New Zealand	29
Egypt	42	Germany	29
Singapore	41	France	28
Philippines	41	Italy	27
Saudi Arabia	41	Mexico	27
Switzerland	39	Vietnam	27
United Arab Emirates	37	Taiwan	27
Poland	36	Netherlands	27
United States	33	South Korea	26
Australia	32	Peru	25
Canada	32	Sweden	24
Indonesia	32	Chile	24
Brazil	31	Argentina	24
Czech Republic	31	South Africa	21
United Kingdom	29	Japan	21

Source: ADP Research Global Workforce Survey

Share of workers who agree, by market and age group

	18-26	27-39	40-54	55-64
Argentina	29%	24%	23%	17%
Australia	40	44	31	20
Brazil	38	29	29	29
Canada	43	41	32	21
Chile	27	26	24	20
China	31	24	34	44
Czech Republic	27	38	30	27
Egypt	40	45	38	30
France	30	39	27	19
Germany	42	43	23	18
India	61	69	62	49
Indonesia	37	35	26	19
Italy	41	30	31	18
Japan	23	28	22	20
Mexico	27	31	26	16
Netherlands	33	34	27	15
New Zealand	35	35	26	18
Nigeria	52	46	38	37
Peru	27	28	25	20
Philippines	53	42	37	26
Poland	39	39	38	31
Saudi Arabia	48	44	32	29
Singapore	48	47	33	38
South Africa	22	25	17	20
South Korea	30	27	26	21
Spain	43	34	28	21
Sweden	27	30	23	18
Switzerland	34	51	32	22
Taiwan	31	28	27	16
Thailand	50	48	42	46
United Arab Emirates	30	40	36	37
United Kingdom	36	37	31	17
United States	48	43	32	24
Vietnam	30	27	24	25



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