

Indeed Global Talent Report

**How Workforce Agility
Drives Business Results**



 indeed

About Indeed

Indeed is the No. 1 job site in the world¹ with over 635M Job Seeker Profiles² and 350M sourceable Profiles.³ Indeed strives to put job seekers first while providing quality matches for employers, fast, to support their hiring needs. Every day we connect millions of people to better work to create better lives, combining the latest in AI technology with the power of human judgment and connection.

¹Comscore, Total Visits, March 2025
²Indeed data (worldwide), job seeker accounts that have a unique, verified email address.
³Indeed data (worldwide), job seeker accounts set to public that have a unique, verified email address.

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Workforce agility:

A strategy for increasing workforce adaptability by expanding the mix of flexible arrangements, or “agile roles”—including gig and contract employment, interim or fractional positions, career switching, remote “digital nomad” jobs, AI-augmented positions, and job rotations.

⁴[AI at Work Report: How GenAI is Rewriting the DNA of Jobs](#)

⁵In this survey, “job seekers” are respondents who indicated they were either actively seeking a new role or open to new opportunities. Ninety-six percent were employed at the time of the survey. All job seekers in the survey identified workforce agility as at least “slightly important” to achieving their personal career goals.

Introduction

Rethink the definition of work

“What AI can do today is going to be different 18 months from now,” futurist Sinead Bovell told the audience at Indeed’s most recent FutureWorks conference. “Am I going to hire full-time when I actually don’t even know what that job description will be in 18 months?”

Indeed’s Hiring Lab found that more than half of all jobs on Indeed are likely to change at least moderately due to AI, and 26% are poised for radical transformation⁴—though how those roles will evolve and what that means for hiring is difficult to predict.

In response, Indeed commissioned YouGov to survey more than 10,000 employers, and job seekers⁵ in 12 global markets to understand emerging trends as employers adapt to quickly changing conditions. The results? **Workforce agility is on the rise.** But harnessing the benefits of an agile workforce is not simply a matter of adding non-traditional roles to the hiring plan.

Laken Masterson, Vice President of Operations at Indeed, says employers need to rethink their approach to workforce planning from the ground up, deconstructing traditional job roles and evaluating each task and skill needed to reach business goals.

“If we understand the work, we can ask ourselves questions: Can AI do this task? Can it be AI-augmented?” Masterson says. “Understanding the work itself and the levers that actually drive business outcomes allows you to make choices about how to get the work done. You can create a workforce that is a healthy ecosystem of AI-assisted workers, contractors, and full-time employees.”

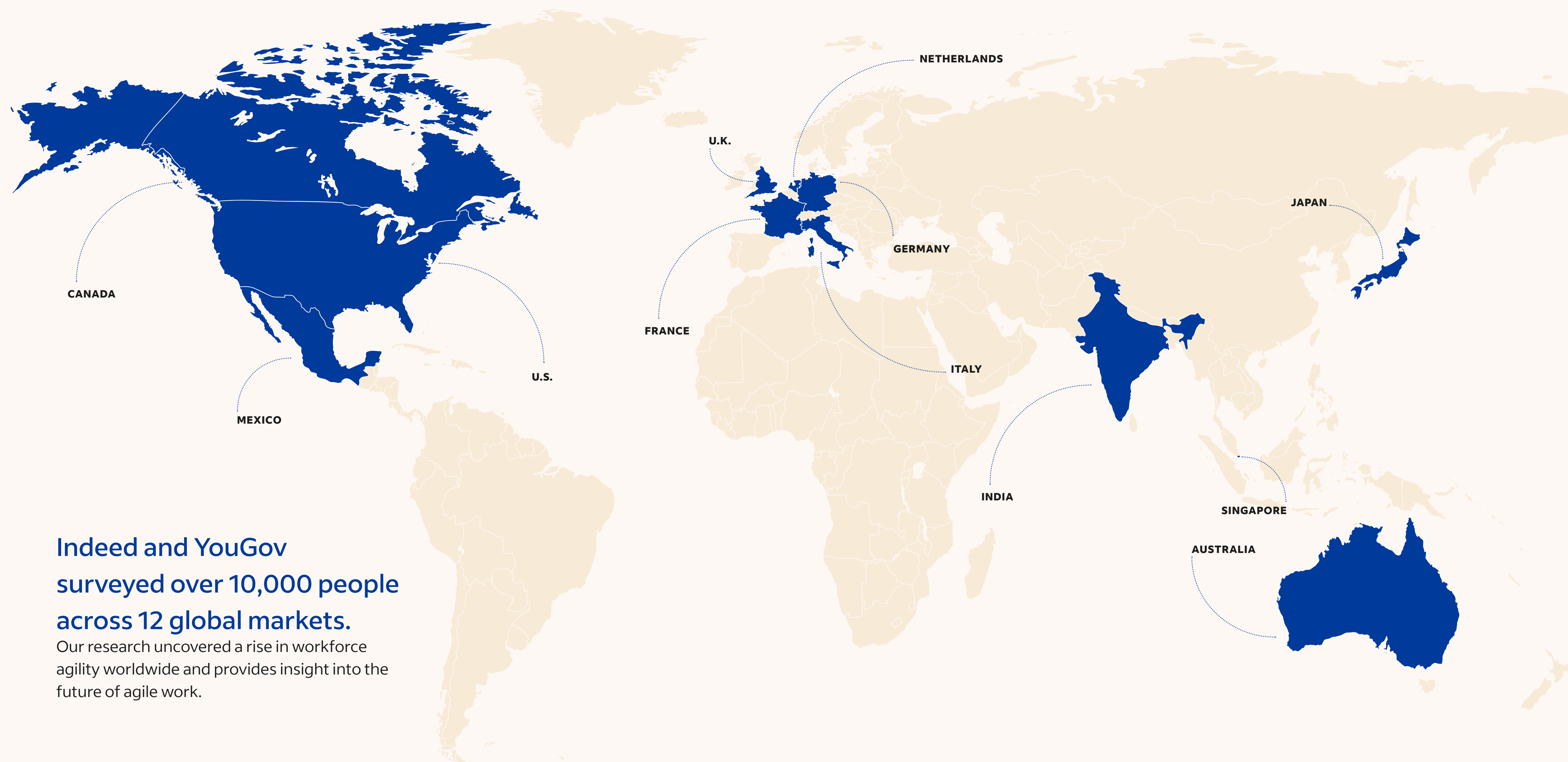


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Laken Masterson,
Vice President of Operations, Indeed

Rethinking the very structure of work may feel unsettling, for both employers and their workforces, and many job seekers still prefer traditional roles. But **workforce agility can provide a path to greater efficiency, productivity, and flexibility in a rapidly changing world.**

In this report, we highlight key takeaways from our survey data, advice from experts on how to prepare for an agile future, and stories from real people who made the leap—and landed in a happy place.



**Indeed and YouGov
surveyed over 10,000 people
across 12 global markets.**

Our research uncovered a rise in workforce
agility worldwide and provides insight into the
future of agile work.

The rise of the agile workforce

Indeed’s 2025 Workforce Agility survey found that 25% of job seekers already work in agile roles, and that’s likely to increase: Just 21% of job seekers say they’ve worked in agile roles in the past, but 45% anticipate doing so in the future. Similarly, 67% of employers anticipate hiring agile workers in the future, compared to 53% today. Eighty-seven percent of employers say workforce agility is “extremely” or “very” important, and 64% of job seekers agree.

The change is already visible on platforms like Indeed Flex, Indeed’s matching platform for temporary work. From 2024 to 2025, the number of verified workers on Flex grew by 10,000,⁶ and the number of shifts posted on the platform rose from 4.8 million to 5.4 million.⁷

What’s driving this change?
In a word: flexibility.

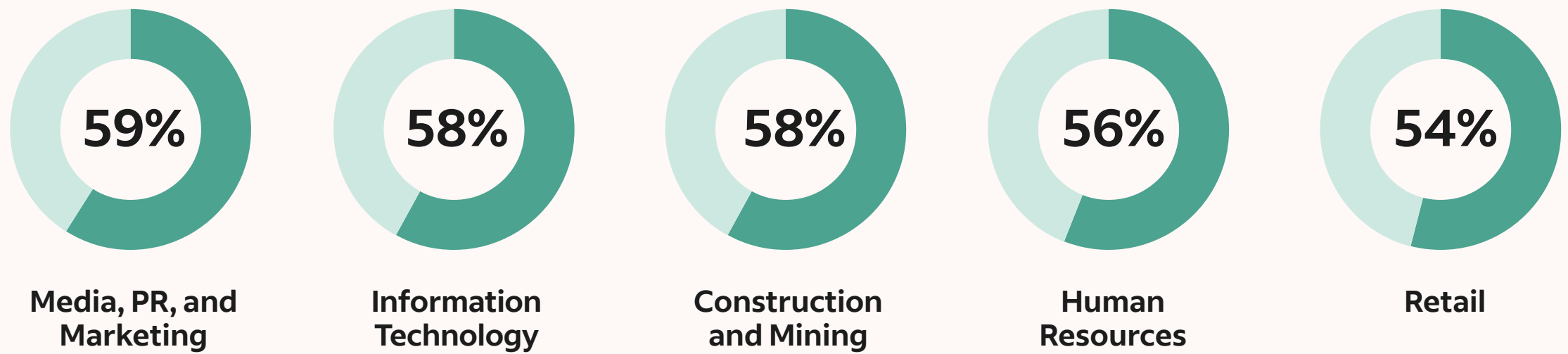
Employers say the top motivating factors for incorporating agile work in their organizations are flexibility and team autonomy (25%) and more efficient allocation of resources (24%). Britney Jo Styer, Client Partner at staffing agency Mathys+Potestio, points out that in the current economy, many companies worry about hiring full-time employees they might need to lay off later. “Many may only have a budget for the next six months,” Styer says. “They’re going to hire someone to do the work for that time frame, and then reevaluate.”

⁶Indeed Flex data (worldwide)
⁷Indeed Flex data (worldwide)

Which sectors are leading the way in workforce agility?
Top five industries where employers say workforce agility is “extremely” or “very” important to achieving their organization’s goals:



Which sectors anticipate an agile future?
Top five industries where employers say they’ll increase their use of agile and non-traditional talent in the coming year:



Employer questions: How important is workforce agility to achieving your organization’s goals? In the next year, is the use of agile/non-traditional talent at your organization expected to... increase, remain the same, decrease, I don’t know?

Flexibility is key for job seekers as well. Their most common reasons for considering agile work are having more flexibility and control over their time and how they work (29%), and better overall work-life balance (26%). This echoes findings from Indeed's 2025 global Smarter Hiring Report,⁸ which found that **more than a third of job seekers say flexibility is the top factor they consider when weighing job offers—even more than salary.**

In addition to more control over their time, agile work gives job seekers important options in a tough hiring market, especially when they're between roles or looking to pivot to a new industry.

"It's a great way to fill gaps in your resume, build your network, and make sure your skills don't get stale," Styer says, estimating that Mathys+Potestio placed the vast majority of candidates in contract roles over the past year, with just a small fraction going into full-time roles.

➤ **Takeaway:** In today's job market, agile work can be a win-win. "Employees are seeking more flexibility, and employers are seeking different ways to get jobs done," says Indeed's Masterson. "Those needs match up quite nicely together. I think most employers will land in a space where at least 25% of their work will be done through agile workforces."

Top motivations for embracing agile work

■ Employers
■ Job seekers

25% Flexibility and team autonomy

24% More efficient allocation of resources

29% More flexibility and control over their time and how they work

26% Better overall work-life balance

⁸Indeed Smarter Hiring Insights: Solving the 7 Disconnects That Make Hiring Harder (2025)

Use agile work to fill skill gaps

The pace of technological change makes it difficult for employers to anticipate which skills their workforce will need in the next year—or even the next quarter. According to the 2025 World Economic Forum Future of Jobs Report, 63% of employers say skills gaps will be a major barrier to business growth over the next five years.⁹

Talent leaders see workforce agility as a way to fill those gaps. **Nearly a quarter of employers say access to specialized skills is a key reason to hire agile workers.**

➤ **Takeaway:** Agile talent can not only fill skill gaps but also help organizations build new capacities.

AI adoption is a perfect example, according to Matthew Morrissey, Senior Client Engagement Manager at Clarity Technology Partners, which helps companies hire technical and IT talent. These days, Morrissey frequently places contractors who

act as short-term AI consultants. “Companies know they need to do something with AI, but they don’t know what it is,” Morrissey says. They’re not ready to hire a team, but they get a lot of value from contracting an expert who can help define strategic priorities and create a roadmap for AI implementation that informs future hiring strategies.

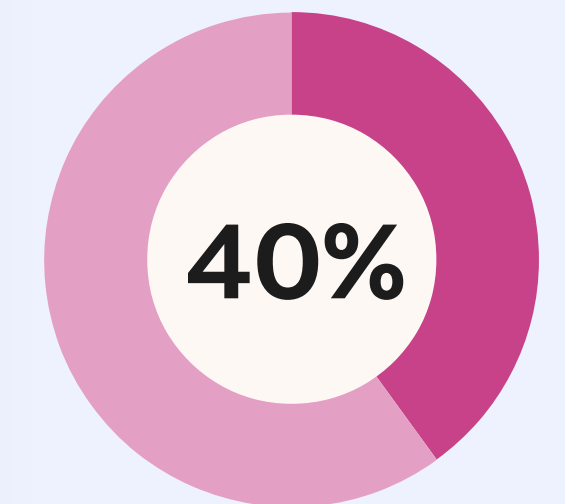
Similarly, fractional executives—C-suite-level leaders who work with companies on a part-time or short-term basis—can not only help drive growth when companies can’t afford to hire senior leadership, but they can also train emerging leaders to take the reins. “Organizations often just need that fractional support for a temporary amount of time, and it gets them to the next level,” Styer says.

Apply within

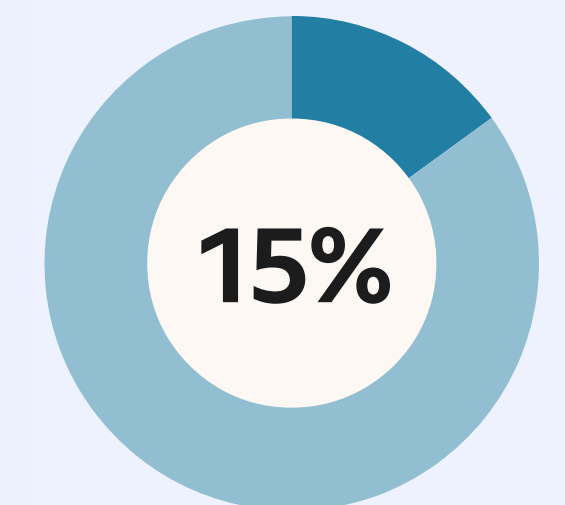
Many organizations are filling skills gaps by tapping into capabilities in their current workforce. Unilever and Mastercard have internal marketplaces where they post project-based and gig work that employees can take on, in addition to their regular roles and outside their normal work hours, to build skills and earn extra income. Many of these marketplaces use AI to find employees with the right skills for the projects that need to be done.

In our survey, however, we found that internal hiring for agile work is often a missed opportunity. Forty percent of employers say internal hiring is their second-largest source of agile talent. But just 15% of job seekers look for agile work with their own employer, the second-lowest cited source of opportunities.

“Employers need to think about how to advertise agile work to their existing workforce,” Masterson says. “I don’t think businesses take advantage of that enough by offering project roles that are paid opportunities outside employees’ scope of work.”



of employers say internal hiring is their second-largest source of agile talent.



of job seekers look for agile work with their own employer.

⁹World Economic Forum Future of Jobs Report, January 2025

Case study: A fractional success story

In early 2022, U.K.-based Simon Wakeman was CEO of a professional services firm that had grown extremely quickly through acquisitions. “It was a pretty mad time,” Wakeman says. “I felt like I was getting farther from the work I enjoyed.”

He gave himself 18 months to find a way out, and he shared that openly with the company’s founders so they could prepare. When he finally made the leap, he found a consulting gig with a business going through a difficult restructuring—a role he defined as a part-time, temporary managing director. “Around that time, I discovered the label ‘fractional,’ which was something that I hadn’t really come across before,” he says. “The fractional market is not as mature in the U.K. as it is in other regions.”

Wakeman had two primary goals for switching from full-time to agile work: flexibility and variety.

“I discovered that the way to meet both of those goals was to design a role as a fractional COO,” he says. “I can architect the life that I want and then find clients willing to accommodate that.”

He helps companies through change—designing leadership structures, hiring for key roles, creating effective processes—typically for six to eight months. These short engagements give him the variety he craves and, he argues, better outcomes. As a “semi-outsider,” he says he has useful objectivity. “I can spot patterns really quickly, set them up on the right track, and then be on my way,” he says. “Before I go, I help them find a permanent, full-time version of me.”

Wakeman takes on one fractional job at a time, allocating two to three days a week to that client. He supplements fractional work with consulting and coaching, and he keeps six months’ worth of living expenses in the bank in case of a dry spell. Every summer, he takes six weeks off.

His system requires rigorous organization and ongoing business building. “About 50%–70% of my time is charged to clients,” he says. “The rest of it is all of the other stuff: networking, marketing, sorting out tax forms.”

Initially, he assumed he’d work fewer hours than he had as a full-time CEO but, in reality, it’s about the same. “But the interesting thing is, I’m okay with that, because I’m choosing it,” he says. “It’s ultimately more about agency and control than pure flexibility.”

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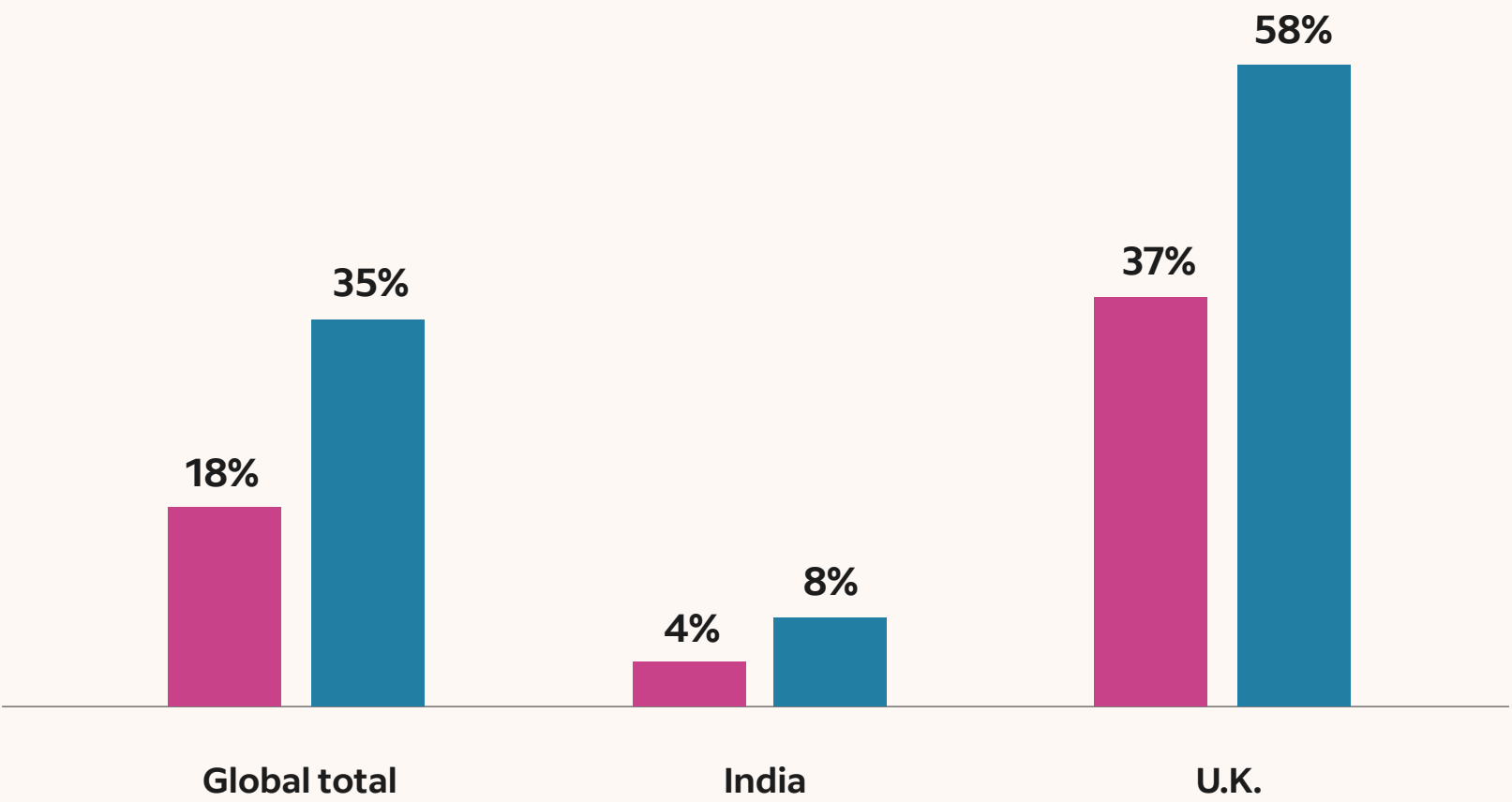


Simon Wakeman,
UK-based fractional
and consultant COO at
Wakeman Advisory Ltd.

Global outlook: How AI powers workforce agility

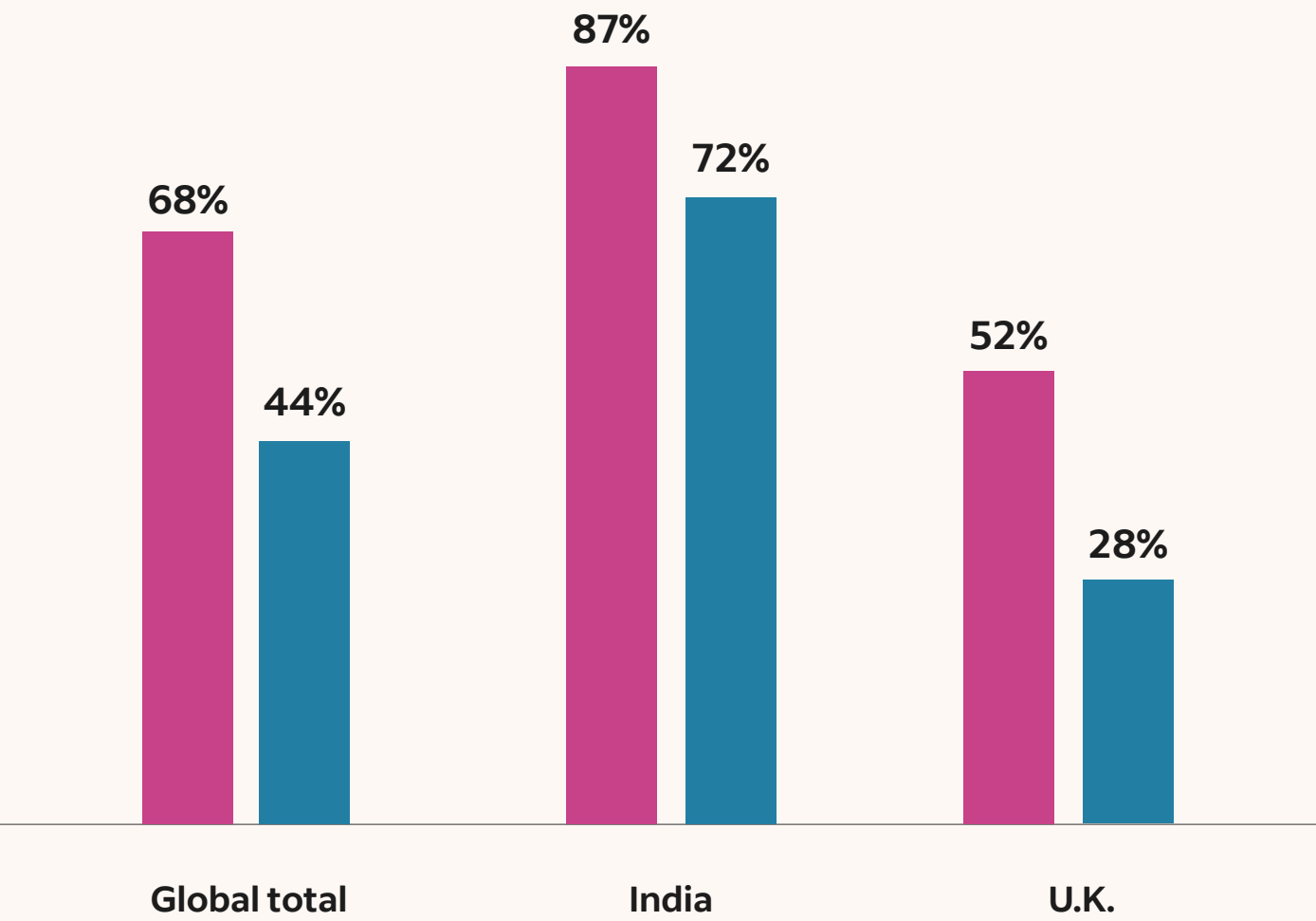
Our Agile Workforce Survey uncovered several important connections between AI and workforce agility. Comparing trends between India, the largest AI adopter for agile work in our survey, and the U.K., the slowest adopter, reveals the potential of AI to power agile work—and provides a glimpse into the future.

AI adoption for agile work
Employers and job seekers in the U.K. were more likely than any other region to say **they’re NOT using AI for workforce agility at all**, compared to a small fraction in India.



Employer question: How does AI currently enable your organization to hire and manage an agile/non-traditional workforce? Select all that apply. Response shown: We are currently not using AI for workforce agility.
Job seeker question: How does AI currently enable you to find and manage agile/non-traditional work? Select all that apply. Response shown: I am not using AI for this.

AI and agile opportunities
Most job seekers and employers in India say the rise of AI is creating more high-wage, agile work opportunities, while those in the U.K. are more skeptical.



Employer question: To what extent do you agree or disagree with the following statement? The rise of AI is accelerating the shift of higher-wage workers into more agile, flexible roles.
Job seeker question: To what extent do you agree or disagree with the following statement? AI is creating more high-wage opportunities for flexible or agile work.

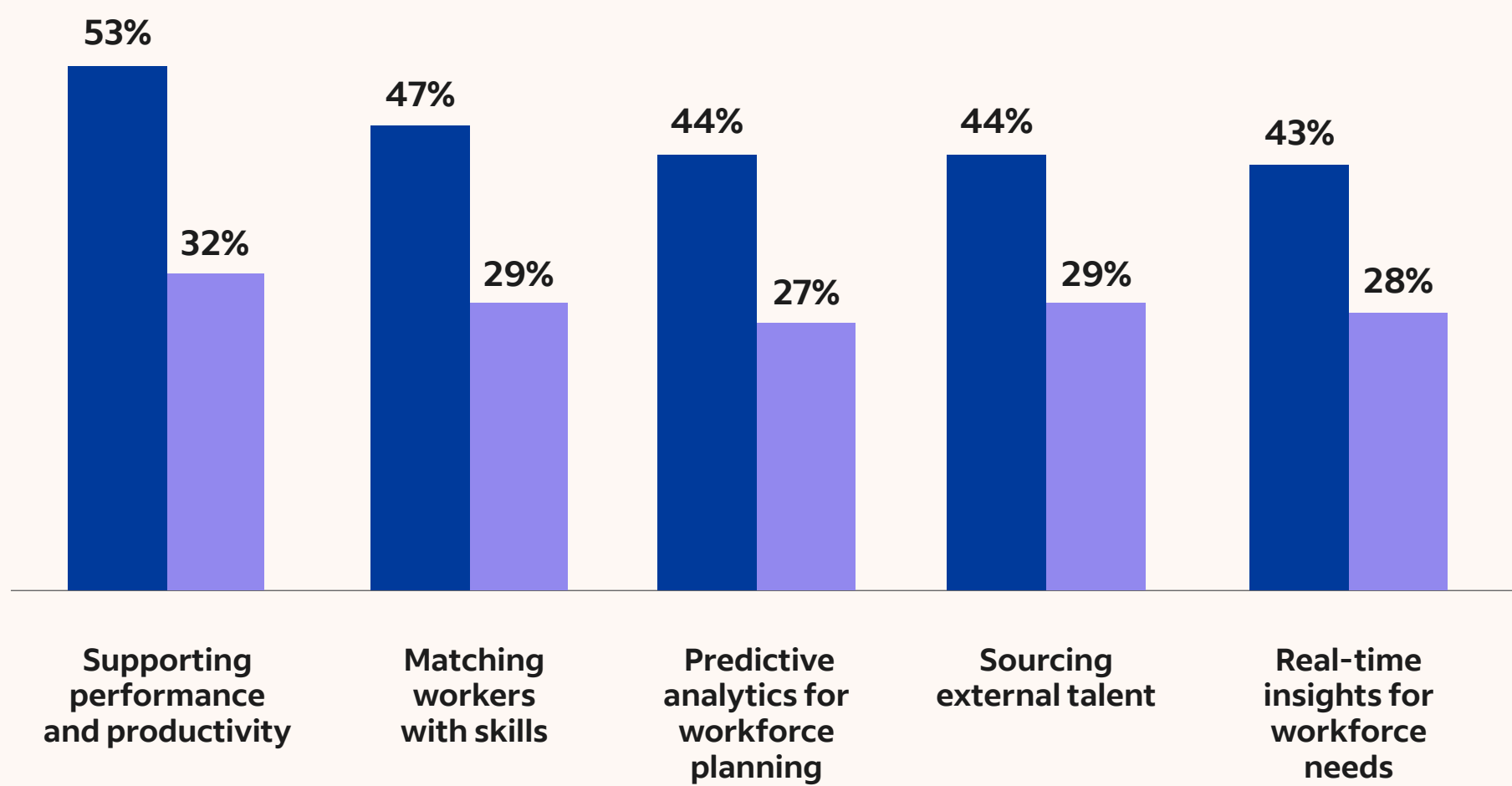
Employers Job seekers



India's roadmap to agile success

Best practices

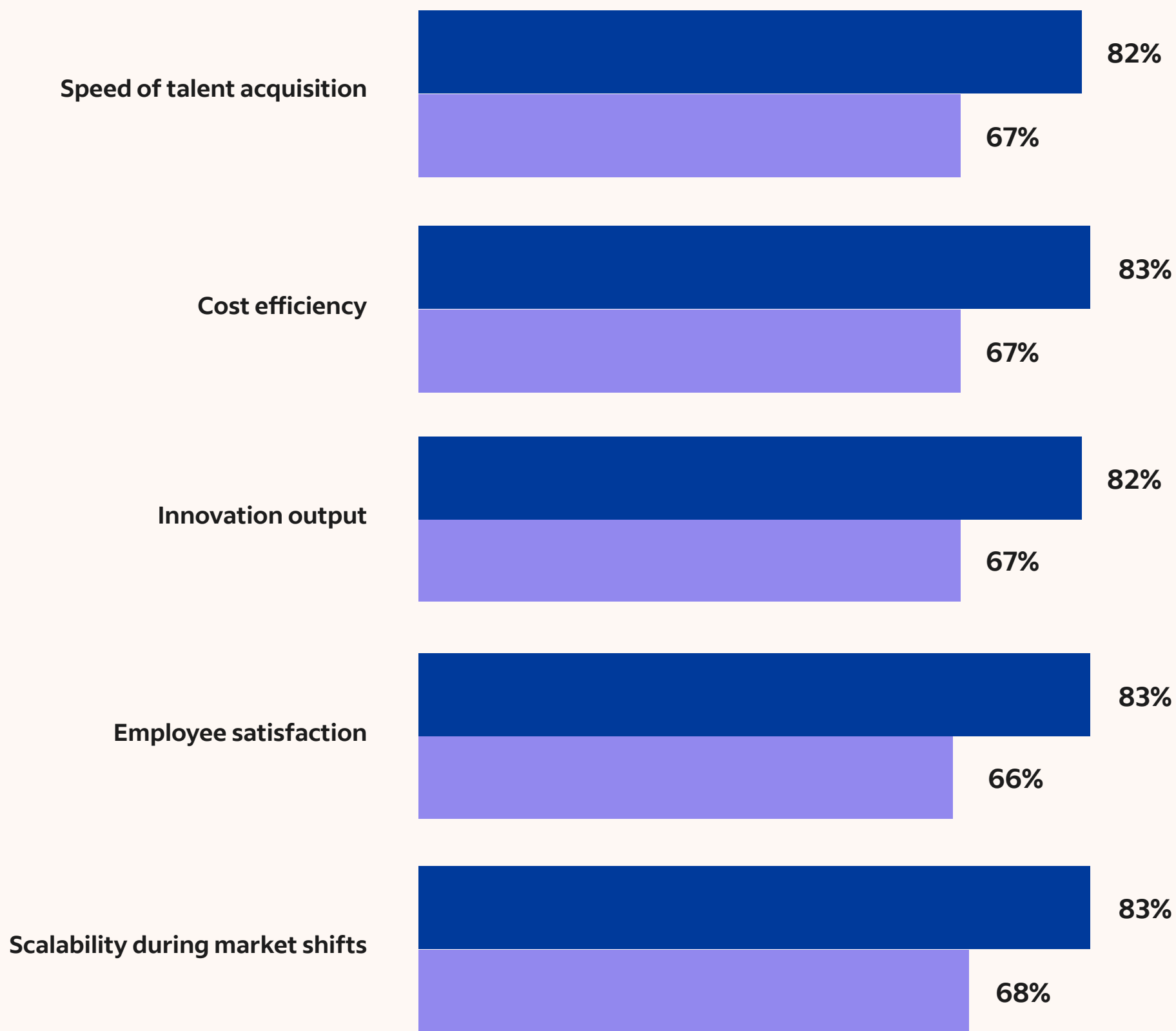
In India, employers are more likely to be using AI to break down the work that needs to be done and the skills needed to do it, in order to inform hiring strategies. Top AI use cases are:



Employer question: How does AI currently enable your organization to hire and manage an agile/non-traditional workforce? Select all that apply.

Agile workforce effectiveness

The majority of employers worldwide say their agile workforce is more effective than their traditional workforce in key areas for business performance —and that’s especially true in India.



Employer question: Rate the effectiveness of your agile/non-traditional workforce when compared to your more traditional workforce in: speed of talent acquisition, cost efficiency, innovation output, employee satisfaction, scalability during market shifts.

■ India ■ Global average

The job seeker's dilemma: Agility or stability?

Job seekers may be increasingly open to agile roles, but most are hesitant to give up the security of traditional jobs. Sixty-three percent of workers currently hold a single full- or part-time job, and they say these traditional roles are their top choice in the current economic climate—well ahead of agile options.

Unpredictable annual income (32%), lack of opportunities (26%), and irregular or delayed payments (23%) are job seekers' main worries about agile work.

These concerns are less prevalent in younger generations: Gen Z is the least worried about unpredictable income, and Gen X is the most concerned.

Still, job seekers of all ages are wary of giving up the benefits that come with traditional jobs. Thirty-eight percent say they'd be more likely to consider agile roles if they could have paid time off. Globally, 28% say they'd be swayed by access to company health insurance (including markets with universal healthcare, as those employers frequently offer additional and premium coverage). Twenty-six percent say access to a retirement savings plan would make agile work more attractive.

Styer points out that staffing agencies often provide this security; for example, Mathys+Potestio offers paid time off and health insurance. While these benefits might not be as generous as what a full-time employee might get, job seekers are willing to take a bit less in exchange for the flexibility of agile work.

Styer says workers placed through a staffing agency are typically employees of the agency, not the company where they're working, so they're paid regularly, regardless of any delays on the company's side. Indeed Flex even gives workers the option to get 50% of their pay on the same day they work a shift.

➤ **Takeaway:** Employers looking to build an agile workforce can take cues from agencies' moves to meet job seekers' needs for stability and security. Offering consistent, timely payment and basic benefits, even if they're less than full-time perks, can be a cost-effective way to attract and retain agile talent.

Rethinking risk

Attitudes may be changing, but 55% of job seekers still think taking an agile role is a risky career move. However, Styer says that in the current economic climate, **traditional jobs may actually be less secure than agile roles.**

“The reality is that full-time, direct-hire roles are not necessarily more stable, because you can still get laid off at any time,” she says. “Whereas with a contract, a company already knows up front that they have a budget for that set period of time. It's pretty rare for a contract to get cut short.”

55% of job seekers still think taking an agile role is a risky career move.

The link between workforce agility and wellbeing

Indeed’s 2025 Work Wellbeing report found that a whopping 80% of employees are not thriving at work. This isn’t just an HR problem but one that affects the bottom line: Employees with high wellbeing achieve work goals 1.5 times more often than those with low wellbeing.¹⁰

Workforce agility can help. **Fifty-five percent of job seekers say working in agile roles improves their wellbeing at work.** Globally, 70% of employers say agile and non-traditional models improve overall workforce wellbeing—and that includes traditional employees as well as agile workers. Styer says her clients frequently bring in agile talent to cover employees’ parental leave to avoid burnout among permanent employees who would otherwise have to take on extra work.

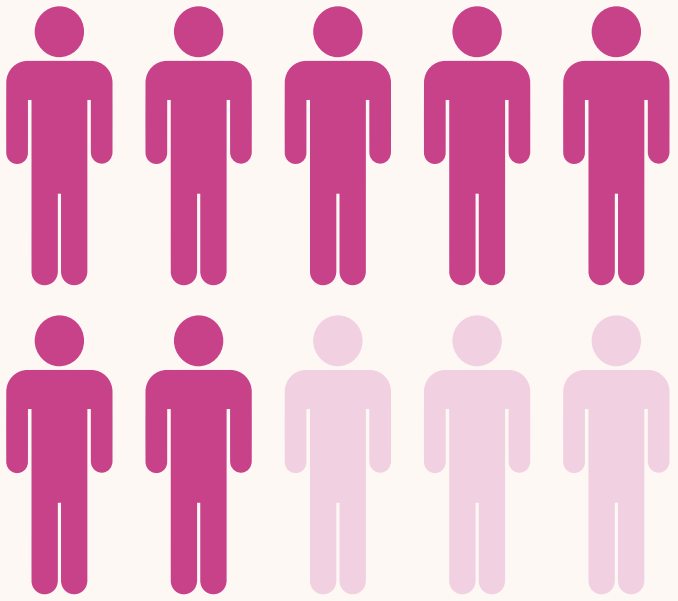
Supporting workforce agility also pushes organizations to address new issues around inclusion and belonging—one of three core drivers of wellbeing on the job, according to Indeed’s research.¹⁰

Our Workforce Agility survey backs this up: 62% of job seekers say it’s essential to feel included when working on teams with a mix of agile and traditional workers, and three-quarters of employers say that building a culture of inclusivity between traditional employees and agile talent is essential for long-term success.

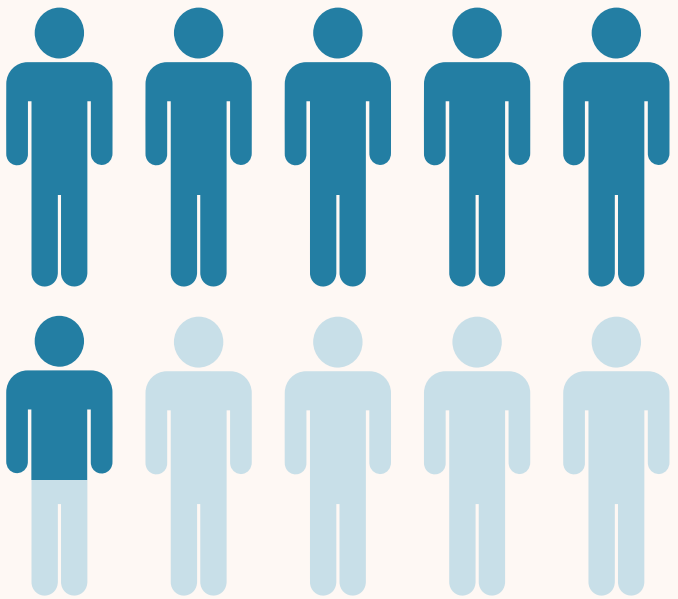
Takeaway: It’s up to employers to determine how—and how much—to include non-traditional employees in company processes and culture. Indeed’s Masterson says the key is thoughtful evaluation of how to support workers’ success and wellbeing.

Critical, yet often overlooked, is the need to adapt IT protocols to make sure confidential information stays secure without locking non-traditional workers out of systems and meetings that are important to their work.

On the flip side, Masterson says, team happy hours may not be worth it—agile workers might actually be seeking more freedom from social pressure. What’s far more important is recognizing agile workers for their contributions, no matter how short-term they might be.



70%
of employers say agile and non-traditional models improve overall workforce wellbeing.



55%
of job seekers say working in agile roles improves their wellbeing at work.

¹⁰Indeed 2025 Report: How Work Wellbeing Fuels Performance: A Strategic Imperative for Sustained Success

Case study: Agile work and wellbeing in action

Janeane Tolomeo spent her 20s sprinting up the corporate ladder, arriving, in her early 30s, at a job she loved: Corporate Marketing Director at Indeed, leading the Work Wellbeing Initiative. But because of her drive and dedication, she found herself working to the point of exhaustion. While she spent her days trying to help people thrive at work, in her own life, she was burning out, craving more time and energy to exercise, cook, and travel. “It was not sustainable for me, physically or mentally,” she says.

Then, Tolomeo faced a health crisis: a cancer diagnosis that forced her to focus on her recovery—and reevaluate how she was spending her time and energy. “It just really hit me: I’m getting a second chance at life, and I need to take it,” she says. “That is what gave me the bravery to move toward a life where I am able to thrive.”

Although she wanted to stay with Indeed, doing the work she cared about, Tolomeo decided to make a change. She knew that her expertise and long-term knowledge of the

Work Wellbeing program offered value even if she wasn’t full time, so she began planning and saving. “There were a few years when I sacrificed to prepare to do something less stable,” she says. “It’s definitely a privilege to be able to take a career risk.”

At first, she moved into a contract role, working 20 hours a week. Recently, she took another leap: She moved to Florence, Italy, and became a freelancer with Indeed, working 10 hours a week while exploring work as an independent marketer, helping small businesses scale.

The move to agile work has been an adjustment. “I definitely don’t feel as connected to the team,” she says, but her streamlined schedule and responsibilities allow her to focus on the work that’s most meaningful to her and has the biggest impact for the business.

She lives on a much stricter budget than she did when she was full time, but she relishes the ability to choose when she’s in front of her computer and when she’s not. “It’s exciting, just being able to have more time to be out in the world, enjoying life,” she says.

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It’s definitely a privilege
to be able to take a
career risk.”



Janeane Tolomeo,
Strategic Initiatives
Marketing Leader, Indeed

Employer action plan

- ✓ **Strategic workforce planning: Audit tasks, not roles.**
The roles you hired for in the past may not be the roles you need in the future. Rather than just replacing headcount, analyze the tasks that need to be done and the skills required to do them, and determine what AI can automate or agile talent can perform.
- ✓ **Leverage AI to power workforce agility.**
Use predictive analytics, real-time insights, and analysis of skills among your employees.
- ✓ **Fill skills gaps: Tap into internal capabilities and agile leadership.**
Create internal job boards to tap into skills that exist within your current workforce—and make sure your employees know about them. To bring key capabilities into the organization, look to temporary consultants and fractional leaders who can define strategic priorities and build capacity.
- ✓ **Overcome barriers: Address job seekers' desire for stability.**
Ensuring regular pay and offering benefits like paid time off, health insurance, and retirement savings will attract agile talent. Workers will consider less comprehensive benefits in exchange for the flexibility of agile work.
- ✓ **Improve wellbeing with workforce agility.**
Thoughtful strategies to promote the inclusion, belonging, and recognition of an agile workforce will help improve wellbeing for all employees.





Methodology

Indeed Global Talent Report: How Workforce Agility Drives Business Results is based on an online survey conducted from July 18 to August 5, 2025.

Respondents included:

- 7,317 job seekers, defined as people who are in full- or part-time employment or are looking for work.
- 2,966 employers, defined as people with senior management responsibility in their organization.

This survey represents 12 of Indeed’s core markets. Respondents per country were distributed as follows:

- Job seekers: Australia (250), Canada (501), France (507), Germany (511), India (1,005), Italy (503), Japan (1,013), Mexico (252), Netherlands (253), Singapore (503), U.K. (1,009), U.S. (1,010)
- Employers: Australia (101), Canada (101), France (101), Germany (245), India (502), Italy (100), Japan (501), Mexico (102), Netherlands (100), Singapore (100), U.K. (513), U.S. (500)

When referencing this research, please use the following citation:

Indeed Survey with YouGov 2025,
Total N=7,317 job seekers, and 2,966 employers

Country summaries

At a glance: Country highlights

Australia: Agility drives innovation and cost efficiency

Australia leads other countries in wellbeing, inclusion, and AI use to support workforce agility. Employers use agile talent to optimize resources and reduce labour costs, and see strong gains in innovation.

Canada: Employers lead global agile adoption

Employers in Canada lead the world in their use of agile talent, but they worry about candidate quality. There is room for improving alignment between job seekers and employers about benefits and the value of AI.

France: Variety makes agile work appealing

France stands out among countries surveyed for the value job seekers and employers see in the variety provided by agile work. Both groups, however, are less likely than global peers to say agile work improves wellbeing.

Germany: Making up for talent shortfalls

Employers in Germany see agile work as a solution to talent shortages, yet they struggle to find quality candidates, and job seekers have trouble finding good-fit roles. Clear employer communication about internal agile opportunities could provide solutions for both groups.

India: A mature agile market driven by speed and ambition

India is one of the most agile-forward markets surveyed. Employers and job seekers embrace agility for career growth, hiring speed, and financial benefits. AI adoption for agile work is higher in India than in any other country surveyed.

Italy: Divided about wellbeing, united in AI skepticism

Italy's adoption of agile work is above global averages, led by workers seeking flexibility and balance, though increased focus on inclusion and wellbeing may improve both employers' and job seekers' experiences with agile work.

Japan: Missed opportunities to leverage internal talent

Japan shows cautious adoption of agile work, despite concerns about talent shortages. Employers could benefit from tapping into internal talent pools to fill agile roles.

Mexico: Agile aspirations

In Mexico, job seekers and employers rate workforce agility as extremely important, yet adoption remains near global averages. Strong optimism and widespread AI use may help increase workforce agility.

Netherlands: Conflicting views of agile work

The Netherlands has the highest share of job seekers who identify as agile workers. Both job seekers and employers have strong interest in agile work for the future, but attitudes are conflicted, with cultural resistance creating barriers.

Singapore: Bridging disconnects can unlock agile talent

Employers in Singapore cite above-average use of agile talent, yet a very low proportion of job seekers identify as agile workers. Both groups have a positive view of agile work, but while employers look for agile talent internally, only a small fraction of job seekers look for agile roles with their employer.

UK: AI may improve success with workforce agility

The U.K. lags all surveyed markets in both agile adoption and use of AI to support agile work. But employers are meeting job seekers' demands for flexibility and remote work, which suggests that process improvements and increased use of AI could unlock better outcomes.

U.S.: A cautious view of agile work

U.S. job seekers show below-average agile participation and strong concern about unpredictable annual income, while employers worry about candidate quality. Employers offer above-average perks, yet both groups see agile work as a risk.

Country summaries

Australia: Agility drives innovation and cost efficiency

Overview

Australia's adoption of agile work is on par with the global average. Still, it leads other countries in wellbeing, inclusivity, and AI use to understand the needs of an agile workforce.

AI adoption for agile work

Fifty-nine percent of employers say they use agile talent, similar to the global average of 53%. What's different is employers' motivation: Their top reason for hiring agile talent is more efficient allocation of resources (33%)—more than any other country, and the only one where this is the top motivation. Employers in Australia are also the most likely to use agile work to reduce labour costs and wage expenses (25% compared to 16% globally).

Among job seekers, just 17% identify as agile workers, slightly below the global average of 21%. While employers in Australia are among the most likely in our survey to say they'll hire agile talent in the future at 77% (vs. 67% globally), only 42% of job seekers say they'll consider agile roles in the future, a bit less than the worldwide average (45%). Job seekers say their top challenge is a lack of agile opportunities—36% say this is an issue, compared to 26% of job seekers worldwide.

Employers have a clear opportunity to attract agile talent by better communicating agile opportunities and the benefits of agile work.

Agile workforce planning and management

Eighty-one percent of employers say agile models improve workforce wellbeing, the highest in our survey, along with India, and significantly above the average across markets (70%). The vast majority of employers in Australia (92%) say agile workers are somewhat or fully included in the workplace—again, the highest in the survey, along with India. Job seekers are more tentative, but 61% agree that agile roles improve work wellbeing, compared to 55% of their peers worldwide, and 83% say they're somewhat or fully included, the most among those surveyed.

Results are good, according to employers: 82% say innovation output is more effective with agile work, again tied with India, compared to a global average of 67%.

AI use

Nearly two-thirds of job seekers (65%), and 84% of employers in Australia say that AI benefits both groups, making it one of the countries with the highest levels of AI acceptance. Employers' top use of AI is to gain real-time insights for agile workforce needs (47%—compared to a global average of 28%).

AUSTRALIA



Canada: Employers lead global agile adoption

Overview

Employers in Canada currently lead the world in agile talent adoption. But while job seekers and employers agree on the value of the flexibility afforded by agile work, they're less aligned about AI's role in workforce agility.

AI adoption for agile work

Sixty-five percent of employers in Canada say they currently employ agile talent in their organizations, the highest rate among all countries surveyed.

Employers and job seekers equally value the flexibility that an agile model provides (both 29%). Even more important to job seekers is the ability to earn more money—30% say it's their top motivation to seek agile work, the highest proportion in the survey.

Agile workforce planning and management

Forty-two percent of employers in Canada say candidate quality is a barrier to using agile talent, well above the global average (31%), and leading all countries surveyed. This may be a result of Canada's heavy reliance on this workforce.

Better alignment around benefits could help employers attract the agile talent they're seeking. Job seekers in Canada say they would be more likely to look for agile work if roles offered flexible schedules (57%), and the ability to work from home (50%). While 54% of employers offer flexible schedules, less than half (45%) offer remote work options.

Employers in Canada lead global peers in offering access to company health insurance (47%), though just 35% of job seekers say this attracts them to agile opportunities. And while employers in Canada say strong relationships with managers help them find and retain agile talent (43%)—the highest of any country surveyed—just 26% of job seekers say that's a draw.

AI use

Employers in Canada are sold on AI's potential benefits, much more so than job seekers. Over three-quarters of employers (78%) say that AI provides value to both employers and workers, while just over half of job seekers agree. Similarly, 75% of employers say AI is accelerating the shift of higher-wage workers into more agile roles, but just 43% of job seekers say the same.

CANADA

Country summaries

France: Variety makes agile work appealing

Overview

France is largely in line with the global trends that emerged in our workforce agility survey, with steady adoption of agile work and roughly average use of AI to support non-traditional employment. France breaks from global norms in its appreciation for the variety of agile work.

AI adoption for agile work

Employers are using agile workers slightly more (58%) than the global average (53%). Likewise, 23% of job seekers identify as agile workers, just ahead of the average worldwide (21%). Seventy-seven percent of employers in France say they'd consider hiring for agile roles in the future, compared to 67% globally—the most bullish outlook, alongside Australia and the Netherlands, of any country surveyed. Job seekers are not quite as enthusiastic: 44% say they'd consider agile roles in the future, roughly even with the global average (45%).

While 87% of employers in France say workforce agility is “extremely” or “very” important to their organization, just 54% of job seekers say the same about their careers—10 percentage points below the global average.

Interestingly, job seekers in France find traditional roles less appealing than global peers do—52% vs. 62% worldwide. **And France is also the only country where job seekers' main motivation for seeking agile roles is the variety they provide (25%),** although the same percentage cite flexibility, which is the leading motivation globally. **Employers agree: 24% say they use agile talent for fresh and different perspectives, ahead of the global average (20%).**

Agile workforce planning and management

In France, 48% of job seekers and 65% of employers see agility as a driver of work wellbeing, less than their peers worldwide—global averages are 55% and 70%, respectively. And employers in France are more than twice as likely to disagree that agile workforce models improve wellbeing: 14% vs. 6% globally.

Nearly half (49%) of employers in France offer paid time off to agile workers, well above the global average of 35%. But this benefit may not lure job seekers—38% say paid time off makes agile work appealing, but they're more likely to cite flexible schedules (51%) and remote work (40%) as motivators.

AI use

Employers' and job seekers' use of AI for agile work is right in line with global averages, but employers are more likely than average to use it to optimize workforce agility: 33% use AI to analyze team composition to optimize cross-functional feedback (vs. 26% globally), and 31% use predictive analytics for workforce planning and demand forecasting (vs. 27% worldwide).

FRANCE

Country summaries

Germany: Making up for talent shortfalls

Overview

In Germany, employers are looking to workforce agility to address talent shortages. However, employers say they struggle to find quality candidates for agile roles, while job seekers say they have trouble finding agile opportunities that are a good fit.

AI adoption for agile work

Germany's employers are hiring agile talent at about the same rate as the global average, but their reasons for doing so are notably different. While most other countries prioritize flexibility and team autonomy, **the top motivation for hiring agile workers in Germany is shoring up talent shortages at 37%, more than double the global average (17%).**

Employers cite finding quality candidates as their top barrier to using agile talent (34%). At the same time, more than a quarter of job seekers (26%) say their biggest obstacle to finding agile work is that roles aren't a good fit—the most out of all countries surveyed and 10 percentage points above the global average.

Agile workforce planning and management

Clearly, both employers and job seekers in Germany have room for improvement when it comes to connecting the right candidates with the right agile roles. Employers are primarily sourcing agile talent on job boards and platforms (52%) and tapping internal talent (42%). Job seekers are also mostly looking for agile roles on job boards (44%), but just 15% are searching for agile work internally at their company.

AI use

Job seekers are just shy of the global average in using AI for agile work: 39% are not using AI, compared to 35% across markets. While job seekers worldwide most often use AI to support performance and productivity (23%), only 17% of job seekers in Germany do. Employers are also behind on this opportunity: 27% use AI to support performance and productivity, compared to 32% globally.

GERMANY

Country summaries

India: A mature agile market driven by speed and ambition

Overview

Employers and job seekers in India are optimistic about agile work's potential to change work for the better. The vast majority of employers (96%) say workforce agility is “very” or “extremely” important to meeting their organization's goals, and 87% of job seekers say it's similarly important to their careers.

AI adoption for agile work

Just over half of employers in India report using agile talent, about the same as the global average (53%).

However, they're the most likely among their global counterparts to anticipate an increase in the use of agile talent over the next year (74% vs. 50% globally).

Data from both job seekers and employers in India suggests a more mature understanding of agile work and its potential benefits than global peers. Employers cite their primary reason for using agile talent as responding faster to market changes

(30%)—the only country in the survey to name this as the top catalyst for incorporating agility. Job seekers in India are most motivated by the opportunity to earn more money with agile work (27%), and only 22% say unpredictable annual income is a top challenge, compared to 32% of their peers worldwide.

The survey also suggests that job seekers in India are looking internationally for agile work: 21% say the biggest challenge of agile work is time zone coordination (vs. 12% globally), and 19% say the highest hurdle is language or cultural barriers (vs. 10% worldwide).

Agile workforce planning and management

Both job seekers and employers in India view agile work as more effective than traditional work in several key areas. Seventy-one percent of job seekers and 82% of employers say workforce agility speeds up hiring. Both groups

appreciate the financial benefits of workforce agility: 74% of job seekers say agile work offers more earning potential than traditional jobs (compared to 56% of peers worldwide), and 83% of employers say it's more cost-efficient than traditional roles (compared to 67% globally).

Worldwide, job seekers in India are the most likely to say agile work offers more growth than traditional paths (67% vs. 46% globally), and 86% of employers say the same. Job seekers are also more likely than global peers to say agile work improves work wellbeing (69% vs. 55% globally), and 81% of employers agree (vs. 70% worldwide).

AI use

A strong majority of employers and job seekers say AI benefits both groups (89% employers, 73% job seekers). India also boasts the smallest proportion of employers (4%) and job seekers (8%) who say they don't use AI to support workforce agility. For more on AI and agile work in India, see pages 9–10, Global Outlook: How AI powers workforce agility.

INDIA

Country summaries

Italy: Divided about wellbeing, united in AI scepticism

Overview

Italy's job seekers are embracing agile work more readily than the global average. However, there are disconnects between job seekers and employers around wellbeing and workforce agility. The two groups are united in their skepticism about AI, which could prove to be a hurdle to successfully incorporating workforce agility.

Adoption of agile work

Job seekers and employers in Italy are slightly ahead of the global average in their adoption of agile work. Twenty-eight percent of job seekers identify primarily as agile workers, compared to 21% across markets. Meanwhile, 56% of employers in Italy employ agile workers, compared to 53% worldwide.

For job seekers in Italy, the top motivations for seeking agile work are flexibility (30%), and work-life balance (29%). Employers understand that: 31% say a primary reason

they hire agile talent is to address employees' demand for flexibility and autonomy. This is in contrast to employers worldwide, who are most motivated to use agile talent for organizational flexibility (25%) as opposed to responding to workers' preferences (23%).

Agile workforce planning and management

While 73% of employers in Italy say that agile work improves wellbeing, job seekers are less convinced—just 55% agree. This mirrors global trends, as employers are generally more likely to say agile work benefits wellbeing than workers (70% vs. 55%).

But in Italy, both groups may be missing the connection between inclusion and wellbeing. Inclusion is less important to job seekers in Italy than to their global counterparts. Only 6% say being onboarded to company culture would make them more likely to take on an agile role, compared to 18% worldwide. Just 14% of job seekers say access to internal tools and systems attracts them to agile roles (vs. 20% globally), and 16% cite strong manager relationships as a draw (vs. 24% globally). Employers are similarly behind global averages on offering cultural onboarding (26% vs. 36% globally), providing access to tools and systems (26% vs. 38% globally), and robust manager relationships (24% vs. 35% globally).

AI use

Of all countries surveyed, Italy is one of the most skeptical about AI. Among employers, 70% believe that AI benefits both employers and workers, 5% below the global average, and far lower than AI-bullish countries like India (89%) and Mexico (87%). Job seekers are also wary, with only 45% saying that AI benefits both employers and workers. Both groups are unconvinced about AI's ability to shift higher-wage workers into agile roles, with only 37% of job seekers (vs. 44% globally) and 60% of employers (vs. 68% globally) saying that AI is creating highly paid agile opportunities.

ITALY

Japan: Missed opportunities to leverage internal talent

Overview

Employers and job seekers in Japan are less likely to see agile work in their futures. Even though talent shortages are a concern, employers in Japan have been slow to leverage their internal talent for agile roles.

Adoption of agile work

Japan is among the slower adopters of agile work in our survey. Less than 20% of Japanese job seekers identify as primarily agile workers, which is roughly in line with international trends, but only 40% say they would consider an agile role in the future—the lowest of all the countries surveyed. As for employers, only 43% currently use agile workers—10% below the global average—and 60% are open to doing so in the future, compared to 67% globally.

Agile workforce planning and management

Like their peers in Germany, employers in Japan view talent shortages as the main impetus for hiring agile talent. **Despite this need for workers, Japanese employers are last among all markets in leveraging internal talent.** Only a quarter of them look to internal talent pools to fill agile roles, as opposed to 40% across markets, and just 10% of job seekers look for agile opportunities with their current employer.

AI use

Japan is one of the least enthusiastic regions when it comes to AI. Only 51% of employers believe AI benefits both employers and workers, the lowest of all employers surveyed, and just 47% of job seekers say the same. By nearly every measure, employers in Japan are using AI less than their global counterparts to support agile work, from automating repetitive tasks (14% vs. 29% globally) to using predictive analytics for workforce planning (15% vs. 27% globally). Twenty-six percent of Japanese employers and 41% of job seekers say they're not using AI for agile work at all.

JAPAN

Mexico: Agile aspirations

Overview

Job seekers and employers in Mexico see agile work as extremely important, but adoption has yet to catch up with enthusiasm. Both groups have a positive view of AI, and increased adoption of AI for agile work can help overcome barriers to workforce agility.

Adoption of agile work

Workforce agility is more important in Mexico than in any other country in our survey, with 90% of job seekers and 99% of employers considering it “very” or “extremely” important in achieving their career or organizational goals. For both groups, that level of enthusiasm is substantially higher than the global average (64% and 87%, respectively). Adoption of workforce agility, however, is in line with global averages, with 20% of job seekers identifying as primarily agile workers, and 60% of employers currently using agile talent.

Looking ahead, employers and job seekers see greater potential for agile roles, although they remain roughly in line with global trends. Forty-five percent of job seekers say they’d consider an agile role in the future, and 61% of employers say they’d consider hiring agile workers in the coming years.

Agile workforce planning and management

While both employers and job seekers in Mexico recognize the potential of agile work, the two groups are at odds about the barriers to realizing that potential. Job seekers cite a lack of opportunities as their top challenge (30%), while employers are most concerned about a lack of job seekers willing to take agile roles (28%), and the same percentage worry about their ability to integrate agile workers with traditional teams.

AI use

Mexico is among the most optimistic countries when it comes to AI, with 70% of job seekers and 87% of employers saying that AI benefits both employers and workers. AI use in Mexico reflects this positive perception, with 93% of employers and 85% of job seekers using AI for agile work. This—along with the recognition of workforce agility’s importance—may help overcome the disconnect between job seekers and employers regarding agile opportunities. Thirty-four percent of job seekers are using AI to match their skills to projects, roles, or gigs, above the global average (21%). Just over a third of employers are using AI to automatically match workers with the necessary skills, even those from other industries. This is just slightly above the global average, and an area of opportunity.



The Netherlands: Conflicting views of agile work

Overview

The Netherlands is home to more agile workers than any other country surveyed, but the data suggests that attitudes about agile work are conflicted, and job seekers and employers are often misaligned.

AI adoption for agile work

Job seekers in the Netherlands lead the world in agile work adoption, with 36% identifying as agile workers compared to a global average of 21%. Dutch job seekers are also the most likely worldwide to consider agile work in the future: 56% vs. 45% globally.

Employers, meanwhile, are just slightly ahead of the global average in embracing workforce agility: 57% say they're using agile workers, compared to 53% across markets, but they're well ahead in anticipating they'll hire agile talent in the future: 76% vs 67%.

Interestingly, the importance of agile work to the two groups is opposite to their adoption of agility. Just 49% of job seekers say agile work is important to their career goals, while 82% of employers say workforce agility is important to achieving organizational goals.

Agile workforce planning and management

Unlike their global counterparts, employers in the Netherlands are not concerned with candidate quality—globally, it's employers' biggest issue with agile work, but just 17% of employers in the Netherlands say it's a barrier. Their biggest challenge is managing agile talent (29%). **At the same time, almost a quarter (24%) of employers in the Netherlands say cultural resistance is a barrier to embracing agile work, the highest among countries surveyed.** This may provide insight into Dutch trends, which diverge from global perceptions of workforce agility.

Job seekers in the Netherlands are more likely than their peers worldwide to be drawn to the variety of agile work: 26% say they're motivated by fresh experiences, the most of any country surveyed. In contrast, only 10% of employers look to workforce agility for fresh and different perspectives, half the global average and the lowest among all countries in the survey.

These differing goals may be a reason for reports of a subpar experience with agile work. Job seekers and employers in the Netherlands are significantly less likely than global peers to say agile work creates opportunities for career growth and that workforce agility improves wellbeing.

AI use

Employers are in line with the global average in their use of AI for agile work—a fifth say they are not using it for hiring and managing agile workers. Job seekers lag their peers more significantly, as 42% say they don't use AI for agile work, compared to a global average of 35%.

Both groups are less likely than their counterparts worldwide to say that AI is creating more high-wage, agile work opportunities: 51% of employers and 34% of job seekers agree compared to global averages of 68% and 44%, respectively.

NETHERLANDS

Singapore: Bridging disconnects can unlock agile talent

Overview

While both employers and job seekers have a positive outlook on workforce agility, the two groups paint different pictures of agile work in Singapore today. Better alignment between the two groups will likely help both reach their goals for agile work.

Adoption of agile work

Currently, 15% of job seekers in Singapore identify as agile workers, the second-lowest proportion in our survey; only the U.K. is lower (11%). Employers tell a different story: 55% say they’re using agile talent, slightly above the global average of 53%.

Both groups are enthusiastic about agile work. Among employers, 65% would consider hiring agile talent in the future, and 43% of job seekers say they’d consider an agile role—both in line with global averages. Job seekers in Singapore buck global trends by being more likely to find agile roles appealing (60%) than traditional roles (52%).

Agile workforce planning and management

Job seekers’ main motivators for seeking agile work are the same as their global peers, but they’re even more important in Singapore: Flexibility and control over their time and how they work is the top choice (38% vs. 29% globally), followed by better work-life balance (35% vs. 26% globally). Sixty-four percent say flexible schedules would entice them to take agile roles, compared to 54% globally, and 60% would be swayed by remote work, compared to a global average of 48%.

This points to a missed opportunity for employers. Only 40% offer flexible schedules, compared to a worldwide average of 48%, and 42% offer remote work, below the 45% average across markets. **Employers in Singapore can win the war for talent simply by aligning their remote and flexible work policies with job seeker desires.**

Additionally, 40% of employers are looking for agile talent internally, while only 12% of job seekers are searching for opportunities within their own organization—it’s their least-cited source.

AI use

Employers in Singapore are among the highest adopters of AI, with just 10% saying they don’t use AI for workforce agility. Among job seekers, however, 35% aren’t using AI for agile work, matching the global average.

The two groups are also misaligned on the value of AI for agile work: 80% of employers say AI is creating more high-paying agile opportunities, but just 42% of job seekers agree.

SINGAPORE

Country summaries

UK: AI may improve success with workforce agility

Overview

U.K. job seekers and employers are the lowest adopters of agile work of any country in our survey, and also the least likely to use AI to support agile work. Leveraging AI may help both groups find more success with workforce agility.

Adoption of agile work

The U.K. is well behind the rest of the world in embracing workforce agility. The country has **the lowest proportion of job seekers saying they are agile workers at just 11%, compared to a global average of 21%. Similarly, only 39% of employers report using agile workers, also the lowest in our survey** when compared to an average of 53% across markets.

While 43% of job seekers and 62% of employers would consider going agile in the future, this is still below the global average (45% and 67%, respectively).

Agile workforce planning and management

Looking towards the agile future, the U.K. may be poised for success thanks to alignment between employers and job seekers. U.K. job seekers say they'd be more likely to seek agile work for the ability to work remotely (55%) and greater flexibility (53%). Employers are more likely than average to offer those perks: 57% allow agile employees to work remotely, compared to 45% globally, and 52% offer flexible schedules, compared to an average of 48% across markets.

Still, in addition to low adoption, employers and job seekers report below-average success with workforce agility across nearly every metric in the survey, including career growth, business performance, and workplace wellbeing. Employers also rate agility below average when it comes to speed of talent acquisition, cost efficiency, innovation output, and employee satisfaction.

AI use

There is room for improvement in the U.K. when it comes to agile work, and AI may be able to help. The U.K. is one of the most AI-skeptical countries in the survey, reporting the lowest AI adoption rates globally: 37% of employers and 58% of job seekers are not using AI to support agile work. Use of AI for workforce agility tends to go hand-in-hand with successful adoption of agile workforce models in countries like India, which points to potential paths to improvement in the U.K.

U.K.

Country summaries

U.S.: A cautious view of agile work

Overview

While not the slowest in our survey to embrace agile work, employers and job seekers in the U.S. are behind the curve globally. Both groups are more likely than peers worldwide to express caution and risk aversion.

Adoption of agile work

In the U.S., 40% of employers currently use agile work, compared to an average of 53% across markets, and 74% employ traditional workers, well above the global average of 64%. Just 17% of job seekers say they're agile workers, below the global average of 21%.

Looking towards the future, 65% of employers say they'll hire traditional workers, compared to the global average of 49%, and 61% say they'll hire agile workers—less than global peers (67%). Job seekers, however, are slightly more likely than the global average to say they'll consider agile roles in the future—48%, compared to 45% worldwide.

For job seekers, the biggest challenge is unpredictable annual income. While this is the most common barrier worldwide, it's more frequently cited by job seekers in the U.S. (42%) than in any other country. The top barrier for employers is quality of candidates, also the main challenge globally, but a bigger concern for U.S. employers (37%) than the average (31%).

Sixty percent of job seekers see agile work as a risky career move, the highest worldwide, along with the U.K. and Singapore. Meanwhile, 67% of employers say transitioning to an agile workforce involves significant organizational risk.

Agile workforce planning and management

U.S. job seekers are more likely than peers to consider agile roles for flexible schedules (65% vs. 54% globally), remote work (58% vs. 48% globally), and paid time off (50% vs. 38% globally). Employers are generally aligned: 60% offer flexible schedules, compared to 48% worldwide; 55% offer remote work, compared to 45% worldwide; and 41% give agile workers paid time off, compared to 35% globally.

AI use

While 77% of employers say that AI provides value for both employers and workers, just 44% of job seekers agree—and 23% disagree, more than job seekers in any other country.

Half of job seekers and a third of employers in the U.S. are not using AI for agile work, compared to 35% of job seekers and 18% of employers worldwide, making the U.S. the second-lowest adopter of AI for workforce agility after the U.K.



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