



# Automotive World of Work 2025 Outlook

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IN 2025, SALES OF ELECTRIC CARS  
ARE EXPECTED TO SURPASS

**20 MILLION**

**91%**

OF AUTOMAKERS SAY TRADE POLICY  
UNCERTAINTY IS IMPACTING THEIR HIRING PLANS.

**74%**

OF AUTOMAKERS SAY THEY ARE STILL STRUGGLING  
TO FIND THE SKILLED TALENT THEY NEED.

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In 2025, the global auto industry faces significant challenges. Electric vehicle sales are projected to exceed 20 million units in 2025, but sales growth is slower in some key markets. Trade policy uncertainty is disrupting global supply chains and most automakers reporting an impact on hiring plans. Cybersecurity is a critical concern due to the increasing connectivity of vehicles. The integration of advanced safety technologies, while beneficial, adds complexity to vehicle repair and maintenance. This Global Insights research explores the implications for employers as they struggle to execute their strategic workforce plans in this unprecedented business environment.

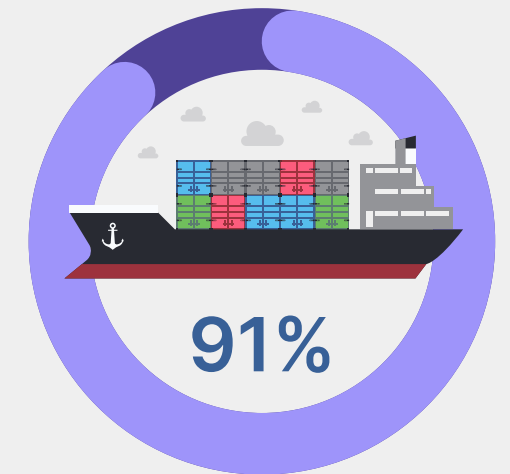
- **What is the current state of play for the global automotive & mobility industry?**
- **What are the implications for automotive employers and workers?**
- **How can business leaders balance the need for efficiency with the need to recruit and retain skilled talent?**



# Trade Tensions Rev Up

Trade tensions are having profound effects on the global automotive industry, leading to significant economic repercussions and operational challenges. The uncertainty surrounding trade policies has disrupted supply chains, increased costs, and led to cautious hiring practices among automakers. However, as the world works through these trade hurdles, it is critical for automakers to retain the right skilled talent so they are ready when the market recovers.

- **Sticker Shock:** The cost of trade policy change for the automotive industry and consumers is very real. For example, in the U.S. alone, a 25% tariff would cost all automakers nearly \$108 billion.<sup>1</sup>
- **Impacting Hiring Plans:** Most automakers (91%) say trade policy uncertainty is impacting their 2025 hiring plans.<sup>2</sup>
- **Wait and See:** Automotive industry employers are staying cautious with most saying they will keep headcount flat (45%), some hiring (38%), and a handful anticipating a decrease (15%) in Q3 2025.<sup>2</sup>



OF AUTO INDUSTRY EMPLOYERS SAY  
TRADE UNCERTAINTY IS IMPACTING  
FUTURE HIRING PLANS.<sup>2</sup>

## Workforce Implications:

- With trade policy news changing every week, it is understandable that hiring demand is down or flat year-over-year throughout the automotive sector.
- Leaders should focus on what they can control, particularly retention of top talent during a time of stressful business uncertainty.
- Employees should also focus on controlling what they control by taking advantage of opportunities to learn new skills or work with mentors.

1. [Center for Automotive Research](#) 2. [ManpowerGroup Employment Outlook Survey, Q3 2025](#)



# EV Sales Acceleration Slows

The global automotive industry has seen a remarkable surge in electric vehicle (EV) sales over the past decade, driven by consumer preference for

environmentally friendly alternatives to gasoline-powered cars. However, recent trends indicate a slowdown in growth in key markets due to economic downturns, supply chain disruptions, and changes in government policies, such as reduced subsidies.

- **Global:** Electric vehicle sales grew by 25% in 2024, surpassing 17 million worldwide in 2024.<sup>1</sup>
- **Regional EV Differences:** China remained dominant as incentives helped increase EV sales to 11 million in 2024. In Europe, sales decreased or stagnated in 14 of 27 markets as incentive programs ended. Sales growth in the U.S. also slowed from 40% in 2023 to 10% in 2024.<sup>1</sup>
- **Major Milestone in 2025:** For the full year 2025, electric car sales are expected to increase by 25% globally, which is similar to the growth rate from 2024. As a result, electric car sales top 20 million worldwide. While sales volumes may be impacted by economic and policy uncertainties, more than one in four cars sold in 2025 is expected to be electric.<sup>1</sup>

DESPITE SLOWING GROWTH  
IN SOME MARKETS

**1 IN 4**

CARS SOLD IN 2025 WILL BE ELECTRIC.<sup>1</sup>



## Workforce Implications:

- Electric vehicle adoption will continue to reshape automotive industry organizational structures built around internal combustion engine vehicles.
- This makes long-term strategic workforce planning and retention of skilled workers even more important.
- Auto industry workers are starting to feel the pressure as many say economic instability (34%) and company restructuring (26%) are the top threats to their career.<sup>2</sup>

1. [IEA 2025 Global EV Outlook](#) 2. [ManpowerGroup Global Talent Barometer, June 2025](#)



# Hybrid Skills

Hybrid vehicles are playing an important role in the market as the transition to fully electric vehicles continues. For consumers transitioning to an EV for the first time, having the backup of an internal combustion engine helps eliminate range and charging infrastructure concerns. If you take a closer look at the current state of the automotive industry, employers are looking for a similar versatility in their talent during a period of transition.



- **Hybrid Sales Growth:** Hybrid powertrain vehicles will continue to play a significant role in automotive electrification. In the U.S., 60% of electric vehicle sales in 2024 were hybrid.<sup>1</sup> In China, 30% of new vehicle sales in 2024 were plug-in hybrid electric vehicles.<sup>2</sup>
- **Hybrid Skills Defined:** Hybrid skills refer to a skill set which bridges traditionally separate domains, blending strong technical know-how with equally strong interpersonal or cognitive abilities. Instead of excelling in only one area, hybrid-skilled professionals bring together the best of both worlds – for example, an engineer who is also an effective communicator.<sup>3</sup>
- **Hybrid Skills Wanted:** Automotive industry employers worldwide say Operations & Logistics (30%), Engineering (24%) and Manufacturing & Production (21%) are the most difficult hard skills to find.<sup>4</sup> They also say Ethical Judgement (29%), Customer Service (29%) and Team Management (29%) are the most difficult soft skills for AI to automate.<sup>5</sup>

## Workforce Implications:

- Jobs are changing quickly due to technology. Skills that were sufficient five years ago may no longer suffice today. It's no longer enough to be only technically strong or only a good communicator; most roles demand both.
- Consequently, most HR leaders agree (91%) building a culture of continuous learning is more important than ever before.<sup>6</sup>
- The opportunity to help workers in this sector is significant as more than half (56%) report they have not received any skills training in the past six months.



1. [CMBC](#) 2. [IEA 2025 Global EV Outlook](#) 3. [Forbes](#) 4. [ManpowerGroup 2025 Global Talent Shortage Study](#) 5. [ManpowerGroup Employment Outlook Survey, Q2 2025](#) 6. [LinkedIn 2025 Workforce Learning Report](#) 7. [ManpowerGroup Global Talent Barometer, June 2025 Study](#)

# Shifting Business Models

The entire automotive industry value chain will continue to evolve. General Motors CEO Mary Barra once said, “I have no doubt the automotive industry will change more in the next 10 years than it has in the last 50.” That pace of change continues today as the industry is transformed by electrification, autonomous driving tech, active safety systems, and new models of vehicle ownership.

- **Software First:** Software Defined Vehicles (SDVs) are vehicles in which the majority of the functions and features are enabled, controlled, and managed by software. Unlike traditional vehicles, SDVs rely heavily on a complex software architecture that integrates various systems and components through seamless connectivity. By 2030, major automakers such as Stellantis and General Motors expect SDVs to generate more than \$20 billion each year from subscription-based services.<sup>1</sup>
- **Electrifying the Workforce:** As vehicle electrification continues to transform the industry, it will also change the roles and skills employers need in the future. Manpower recently partnered with MxD and the University of Michigan to learn how electrification will impact more than 1,300 roles throughout the automotive value chain.<sup>2</sup>
- **The Future Opportunity:** Driven by shared mobility, connectivity services, and feature upgrades, new business models have the potential to grow recurring revenue from new services 30% (\$1.5 trillion) by 2030.<sup>3</sup>



**\$1.5T**

IN NEW BUSINESS OPPORTUNITIES WILL BE CREATED FROM RECURRING REVENUE OF SOFTWARE-ENABLED SERVICES BY 2030 FOR THE GLOBAL AUTOMOTIVE INDUSTRY.<sup>3</sup>

## Workforce Implications:

- The growing focus on software is changing how and where automotive engineering gets done. For example, Tata Consultancy Services (TCS) is building new IT innovation hubs in Europe to help its clients accelerate SDV innovation.<sup>4</sup>
- Global talent sourcing offered through partners such as Experis and Manpower can help automakers and suppliers cost-effectively scale their SDV innovation teams.
- For those impacted by company restructuring, offering outplacement services through partners such as Right Management is not just the right thing to do, but also protects your employer brand.

1. [S&P Global Mobility](#) 2. [MxD EV Hiring Guide](#) 3. [McKinsey](#) 4. [TCS](#)

# Driving Automatic

The global automotive industry is no stranger to process automation since it was the earliest adopter of factory process automation at scale. However, growing AI adoption is now ushering in a similar era of disruption to knowledge workers. Much like the automation of factories, the opportunity for greater precision and productivity will dramatically change the future of work in offices throughout the automotive sector. AI will also change the industry's business models as autonomous driving technology continues to scale.

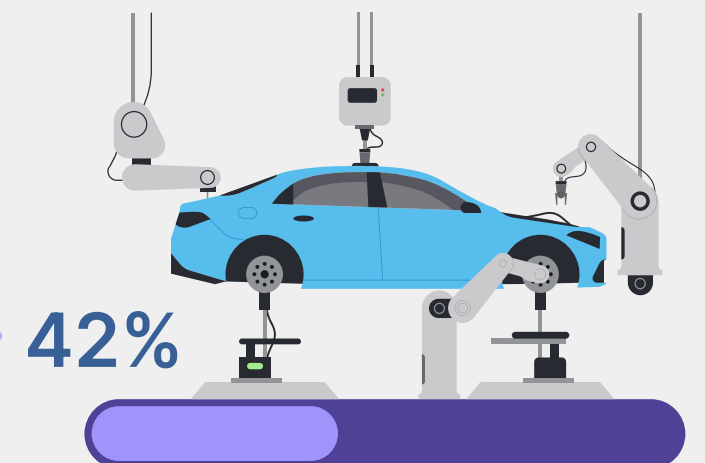


- **Tooling Up:** Most automakers worldwide (65%) say they plan to continue increasing investments in process automation over the next 12 months. Most also say increasing automation will significantly change the required skills for Manufacturing & Production (74%) and IT & Data (74%) jobs within the sector.<sup>1</sup>
- **Managing Change:** With the pace of change accelerating, automakers say their top workforce challenge is change management (37%). However, many are also concerned about the rising cost of skilled workers (36%), employee retention (33%), and difficulty finding new employees (31%).<sup>2</sup>
- **Easing Worker Concerns:** Nearly half of workers in the automotive industry (42%) are concerned advancing technology could replace their role in the next two years.<sup>3</sup>

NEARLY HALF OF THE AUTOMOTIVE WORKERS FEAR THEIR ROLE  
WILL BE REPLACED BY AUTOMATION IN THE NEXT TWO YEARS.

## Workforce Implications:

- Manufacturers will continue leveraging industrial automation and AI to offset increasing costs and talent scarcity in advanced economies.
- However, thoughtful strategic workforce planning and change management are key to retaining the skilled talent needed to fully leverage this automation to create differentiated value for consumers.
- In this era of change, continuous learning and mentoring programs are also more important than ever before. However, more than half of automotive workers (56%) say they have not worked with a mentor in the past six months.<sup>3</sup>



1. [ManpowerGroup Employment Outlook Survey, Q3 2025](#) 2. [Rockwell Automation](#) 3. [ManpowerGroup Global Talent Barometer, June 2025](#)

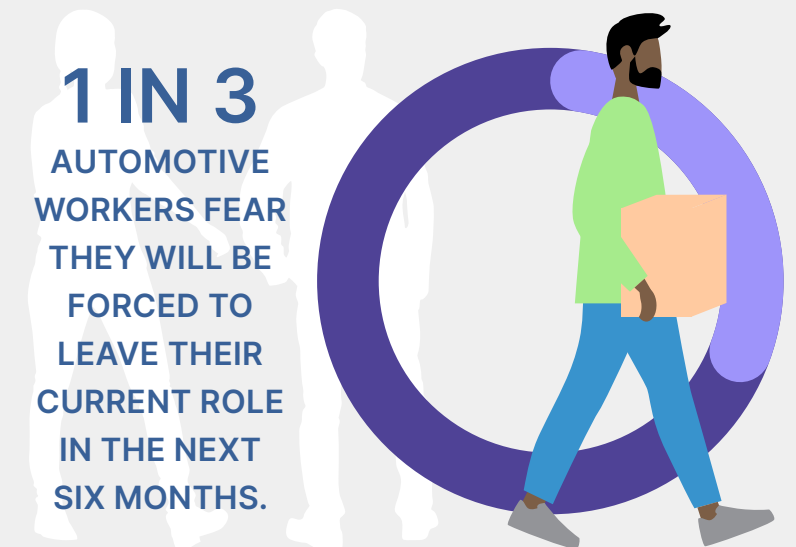


# Hiring Stuck in Neutral



The automotive industry faces challenges with hiring due to the potential of automation replacing roles and difficulty finding skilled talent in key areas like operations, IT, engineering, and manufacturing. At the same time, the business environment remains uncertain as the size of the workforce in the largest industrial economies continues to shrink due to aging populations. In short, it is a challenging time for the industry's HR leaders.

- **Skilled Help Wanted:** Most automakers worldwide (45%) plan to keep headcount flat in Q3 2025.<sup>1</sup> Despite an uncertain global business environment, most automakers still say (74%) they are struggling to find the skilled talent they need.<sup>2</sup>
- **Experienced Talent Exodus:** Workforce aging is having an impact on employers around the world. For example, in the U.S. alone, an estimated 10,000 Baby Boomers will retire every day this year. More than half of automotive employers (72%) are concerned it will have a significant impact on their HR strategy.<sup>1</sup>
- **Worker Uncertainty:** Many workers in this sector (34%) believe current economic uncertainty is a significant threat to their career. In the next six months, one in three (33%) fear it is likely they will be forced to leave their current role, and more (39%) plan to voluntarily leave their current employer.<sup>3</sup>



## Workforce Implications:

- Don't miss the opportunity to leverage the knowledge of your most experienced workers to train the next generation of talent. Employers can scale this through skills mapping throughout their organization to identify opportunities for knowledge transfers.
- Business leaders are aware of the growing challenge of skills gaps, but more than half of automotive workers (56%) say they have not received any training in the past six months.<sup>3</sup>
- Wait and see is the current status quo, but employers willing to take calculated risks have the opportunity to secure top talent before the global economy rebounds.

1. [ManpowerGroup Employment Outlook Survey, Q3 2025](#) 2. [ManpowerGroup 2025 Global Talent Shortage Study](#)  
3. [ManpowerGroup Global Talent Barometer, June 2025](#)

# Top Workforce Opportunities in Automotive



**Buy Low:** The current business uncertainty offers an opportunity for access to a larger pool of skilled talent.



**The Race is On:** Automakers must compete with more industries than ever before as they try to recruit and retain talent to develop software-enabled sources of new revenue.



**Teach the Rules of the Road:** Before they retire, leverage the knowledge of your most experienced workers to help teach your younger workers the hybrid skills they have learned.



**Continuous Learning:** Half of this industry's workforce says they have not received any training in the last six months. Doubling down on training offers an opportunity to do more with less by fully leveraging the talent you already have.



**Tune Up Change Management:** Our Global Talent Barometer showed growing worker anxiety related to accelerating automation and business transformation. Easing this anxiety through clear communication and career mapping offers the opportunity to boost engagement and retention outcomes.



**Think Global:** Particularly for remote-capable roles, global talent sourcing is a proven strategy offering scalability and cost savings.



# Global Workforce Solutions for Automotive



**About Us** — ManpowerGroup® (NYSE: MAN), the leading global workforce solutions company, helps organizations transform in a fast-changing world of work by sourcing, assessing, developing, and managing the talent that enables them to win. We develop innovative solutions for hundreds of thousands of organizations every year, providing them with skilled talent while finding meaningful, sustainable employment for millions of people across a wide range of industries and skills. Our expert family of brands – Manpower, Experis, and Talent Solutions – creates substantially more value for candidates and clients across more than 70 countries and territories and has done so for more than 75 years. We are recognized consistently for our diversity – as a best place to work for Women, Inclusion, Equality, and Disability, and in 2025 ManpowerGroup was named one of the World's Most Ethical Companies for the 16th time – all confirming our position as the brand of choice for in-demand talent.

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**Forward Looking Statements** — This report contains statements, including statements regarding global economic and geopolitical uncertainty, trends in labor demand and the future strengthening of such demand, financial outlook, the outlook for our business in regions in which we operate as well as key countries within those regions, and the Company's strategic initiatives and technology investments, including transformation programs and the positioning of future growth for our brands that are forward-looking in nature and, accordingly, are subject to risks and uncertainties regarding the Company's expected future results. The Company's actual results may differ materially from those described or contemplated in the forward-looking statements due to numerous factors. These factors include those found in the Company's reports filed with the SEC, including the information under the heading "Risk Factors" in its Annual Report on Form 10-K for the year ended December 31, 2024, which information is incorporated herein by reference.