

The quiet truth: A region-by-region look at engagement and wellbeing



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Introduction

Team member **engagement** and **wellbeing** aren't universal truths.

They're shaped by culture, economics, and workplace expectations that differ sharply from one region to another.

But many HR leaders still treat retention as one-size-fits-all.

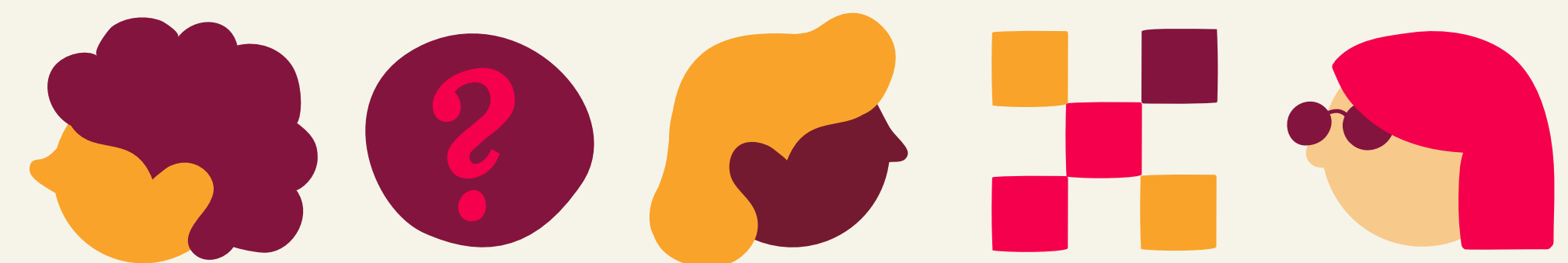
The result? Blind spots that can cost talent and weaken organizational resilience.

A recent **Aon Employee Sentiment Study 2025** revealed just how uneven the landscape really is.

In some regions, more than two-thirds of professionals are actively considering a move in the next year. In others, protections and workplace stability mean **attrition** intent is less than half that number.

Meanwhile, issues like undervaluation, skills development, and the impact of AI are rising concerns across the board—but with different weightings depending on where your people are. This guide takes you inside the numbers, region by region.

We unpack the hidden truths about what professionals in the US, UK, Australia, and continental Europe really think about their work, their wellbeing, and their future—and what HR leaders need to do in response.



Why regional differences matter

When it comes to engagement and **retention**, geography matters more than many leaders realize.

The Aon study shows stark contrasts: In the US, UK, and Australia, team member intent to leave is at record highs—57 percent, 65 percent, and 67 percent, respectively. In continental Europe, the numbers drop dramatically, with just 30–46 percent of professionals saying they plan to move in the next 12 months.

The difference traces back to more than just culture.

It's part of what analysts call a white-collar recession—a contraction in professional and managerial job markets. In countries where hiring and firing are easy, like the US and UK, companies overhired in the post-COVID boom, only to slash headcount or freeze hiring when growth fell short.

That whiplash has delayed promotions and created instability that team members can feel in their day-to-day work.

By contrast, regions like France and Germany—where employment protections are stronger—avoided the sharpest swings. Many companies there slowed or froze hiring rather than cut at scale, helping team members feel more secure. Nordic countries, with diversified economies and stronger social protections, have even sidestepped the recession entirely.

The main lesson? Market structures shape team member sentiment—and HR strategies must reflect those differences.

The United States of America: There's room to build trust

In the US, volatility is the defining theme.

Aon's data shows 57 percent of professionals are considering leaving their jobs in the next 12 months. While only 17 percent say they feel undervalued, nearly a quarter (23 percent) report little confidence that their employer is investing in their skills.

This stems directly from the white-collar recession.

After a post-COVID hiring spree, organizations shed staff rapidly when forecasts didn't pan out. With few protections in place, layoffs hit hard and fast, flattening managerial layers and cutting career pathways. Team members who remain are left with heavier workloads, fewer advancement options, and higher stress levels—which isn't a recipe for success.

On top of this:

- 28 percent of US professionals are unsure how AI will affect their jobs
- More than half say employers should do more to support wellbeing
- Benefits are still critical retention levers—health coverage, retirement plans, and paid time off remain the top priorities.

To counter volatility fatigue, US HR leaders can rebuild trust and stability. That means pairing strong pay and benefits with visible investment in growth. It also means clear communication about AI's impact—and meaningful **offboarding** support to help employees land on their feet, if cuts are unavoidable. Transparency without support risks making the situation worse, while pairing the two can soften the blow.



United Kingdom: A focus on valuing your team

The UK is one of the hardest-hit countries in the white-collar recession. 65 percent of professionals are considering leaving within the next 12 months, the highest rate among major economies.

One in four professionals (25 percent) feel undervalued, and 27 percent lack confidence that their employer is investing in their skills.

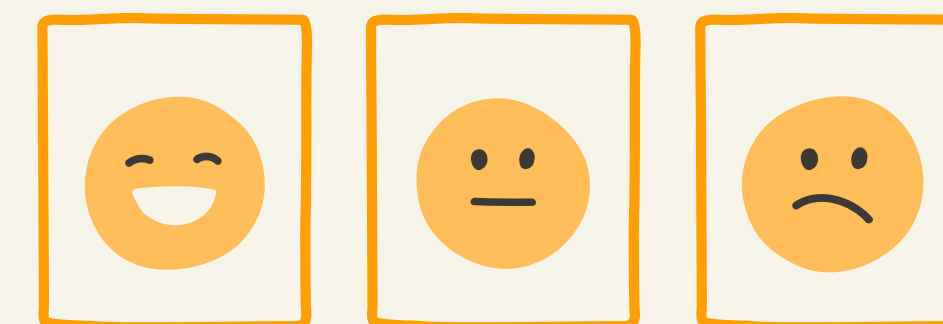
In the UK, the over-hiring cycle and sudden layoffs have hit especially hard.

Job postings in key professional roles soared after COVID, peaked in 2022, and sank below pre-pandemic levels by 2023. Long hiring freezes since then have left professionals feeling stuck and overlooked.

The cost-of-living crisis and stretched public services compound the strain. With **NHS wait times increasing**, team members now expect employers to step up on wellbeing support.

The problem is that over half say their organization isn't doing enough. **Pay transparency** is another flashpoint: 28 percent of UK professionals say their employer isn't open about compensation, further eroding trust.

In the UK, strategies can tackle both emotional and structural needs. Investing in wellbeing, providing upskilling opportunities, and addressing transparency gaps around pay and promotions are critical to showing team members they are valued and supported through turbulent times.





Australia: Tackling unsustainable workloads head on

Australia faces the most acute professional confidence crisis. Aon's data shows that 67 percent of professionals plan to leave their jobs within the next 12 months—the highest intent-to-leave rate worldwide. A staggering 32 percent of team members say they feel undervalued, the worst of all regions studied.

Here, the white-collar recession has taken the form of hiring freezes and role contractions, with many employers flattening hierarchies and stretching workloads. Recent reporting from **HR Brew** highlights how some organizations are taking advantage of workers and intensifying disengagement. Professionals see shrinking career opportunities but rising demands and need extra reassurance.

Skills investment and wellbeing support are also lagging: 28 percent of Australians lack confidence that their employer is

investing in their development, and over half say their wellbeing needs aren't being met.

In Australia, the priority is to close the perception gap. Employers will ideally show, not just say, that they value their people. That means visibly investing in recognition, skills, and wellbeing—and tackling unsustainable workloads head-on. This needs to come with rigorous prioritization of high-value work and the abandonment or deliberate postponement of less essential projects. Without this, high attrition intent will remain the norm.





Continental Europe: Stable and on the up

Across continental Europe, intent to leave is much lower than in Anglo markets. Rates range from 30 percent in Spain to 46 percent in Ireland. Germany and France sit around the mid-30s, while Italy and the Netherlands report similar levels.

The way the white-collar recession has played out drives this relative stability. Rather than mass layoffs, most countries have leaned on prolonged **hiring freezes** or slowdowns. Stronger protections, collective bargaining, and retraining programs softened the blow. In Nordic economies, tight labor markets and diversified industries have even created the opposite effect—a resilience story instead of a recession.

Although positive, not everything is hitting the mark. Between 18 percent and 27 percent of professionals across Europe say they feel undervalued, and in France, nearly a third lack confidence that their employer is investing in skills.

Wellbeing expectations are rising too, with more than half of team members across the region saying companies could do more to support them.

Europe offers an opportunity to build on relative stability without complacency. HR leaders should strengthen recognition and expand skills development to turn stability into sustained engagement and retention.



Global workforce trends shaping retention

Across regions, one message is clear: The white-collar recession is reshaping professional workforces, and team members are responding with caution or discontent.

- **Wellbeing is non-negotiable.** Rising costs and heavier workloads mean professionals everywhere want stronger support.
- **Undervaluation fuels attrition.** From 17 percent in the US to 32 percent in Australia, undervaluation is a predictor of intent to leave.
- **Skills investment builds trust.** When team members see development opportunities, confidence rises. When they don't, engagement drops.

- **AI is an accelerant, not the cause.** Companies like **Klarna and Shopify have used AI to justify cuts**, fueling fears. Yet only 17–31 percent of firms are offering AI training. Team members are told to reskill, but without support or clarity.
- **Pay transparency matters more than ever.** Hidden practices erode trust—especially in volatile markets like the UK and US.

HR leaders must filter global workforce trends through local realities. The same drivers shape every region, but their intensity varies, so localizing strategies while keeping a global framework is the key to resilience.

An action plan for HR leaders

Turning regional insights into action means moving beyond broad strategies to localized engagement playbooks. Here's how HR leaders can respond right now:

- **In the US, rebuild trust.** Focus on stability, transparency, and skills investment. Communicate clearly about AI's role with offboarding support if needed, expand benefits like health coverage, and make career development visible to offset volatility fatigue.
- **In the UK, tackle undervaluation.** Double down on wellbeing initiatives and upskilling, while addressing the transparency gap around pay and promotions.
- **In Australia, close the perception gap.** Confront reports of exploitation head-on by increasing recognition, investing in wellbeing, and making workloads more sustainable.

- **In continental Europe, build on stability.** With attrition intent lower, the priority is deepening engagement. Increase skills programs, strengthen recognition efforts, and improve pay transparency to avoid complacency.

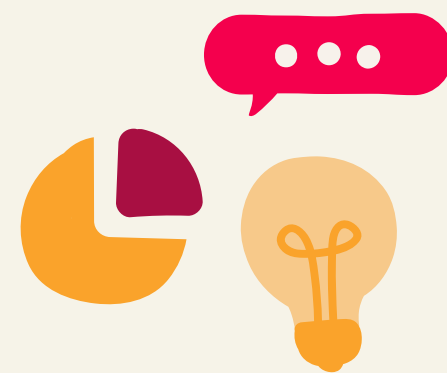
For global HR leaders, the message is clear: Retention is about meeting team members where they are—culturally, economically, and emotionally.

By tailoring approaches to each region while staying aligned to a global vision, organizations can protect performance and turn engagement into a true competitive advantage.

Meet Bob

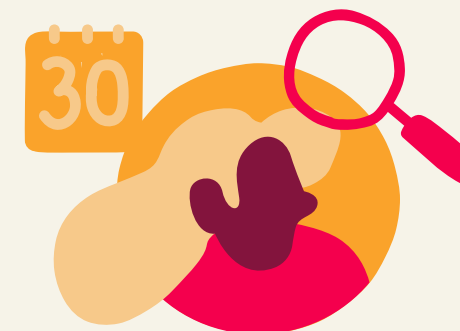
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