

The Future Talent Barometer

SPRING SIGNALS 2026





What is the Future Talent Barometer?

Understanding Future Talent and what they actually think

Tonic's Future Talent Barometer is a quarterly view of how students think about work. Each report draws on 4,000 voices across the UK, US, and Europe revealing the signals shaping attraction, decision-making and the future workforce for employers.

As the youngest of Gen Z joins the workforce and Gen Alpha enters their late teens, the world of work is undergoing one of the biggest shifts since the turn of the century. We're living in a post-pandemic, AI-driven world and the way in which we work and what that means for hiring has changed irrevocably.

Understanding talent of the future and what they actually think is more important than ever; they have grown up fully immersed in digitally connected worlds, were educated through the pandemic and are entering the workforce as AI begins to dominate. There is lots of great research that tells us what young people want from work; money, stability, progression but we need more.

As the system of early careers hiring changes, we need to understand how people experience that system, how they feel about the world of work and how organisations can enhance the system to benefit.

Our goal is simple: give employers a reliable, ongoing view of what's important to future talent, so they can make better decisions about attraction, engagement, and long-term workforce strategy.

Each quarter we'll be surveying students across the US, UK, Germany, Sweden, Denmark, Norway and Australia, capturing attitudes towards work, deeper motivations and feelings about entering the workforce and reporting back consistent patterns or 'signals' then interpreting what they mean for employers.

This quarter, we've identified 6 signals that point to a deeper shift in how early talent is approaching the world of work in 2026. Signals that indicate they aren't entering the workforce with confidence. They're entering it cautiously, strategically, and increasingly sceptical of the systems they're expected to navigate.

This is important

In nearly 30 years of working with early talent recruiters, I've read countless reports. Most focus on the market, or the views of employers. They're useful, but they rarely capture what matters most.

The moments that have stayed with me are different. Panels of students at conferences. Honest, sometimes uncertain, often unfiltered. That's where you start to understand how this generation actually feels about moving from education into the world of work.

Until now, I've not seen that captured in a meaningful way. Not at scale. Not with enough depth to properly inform how we respond as employers.

This first Signals report begins to change that.

It brings together 4,000 voices and nearly 50,000 individual data points to give a clearer picture of how future talent think, feel and make decisions. Not just what they want from work, but how they experience the process of getting there. And how that varies across different markets.

This is also personal. My own children are approaching this transition, which sharpens the importance of getting it right.

This is the very start of a multi-year programme. Every quarter we'll track how these signals evolve, and what they mean for employers. Once each year, those signals will build into a broader view of where the market is heading, The Future Talent Barometer, which will draw together many more data points and perhaps shed some light on what happens next.

My hope is simple: that this work helps employers and future talent move closer together, with a better understanding of what each side needs from the other.

I hope you enjoy reading the first Signals report, and that it will help you too.

Tom Chesterton
Chief Executive
Tonic

The 6 signals

How future talent are really approaching the world of work

Future talent are entering the workforce with a lot of ambition, but not with certainty. Across markets, confidence is fragile, trust in hiring systems is weakening and the expectations of employers are changing fast.

This quarters' six signals reveal a generation that is motivated, digitally fluent and highly adaptive, yet one that is increasingly sceptical of the systems designed to attract them.

1,

The Confidence Crisis

Self-doubt permeates the psyche of the next generation. Young talent are less worried about getting a job than whether they will succeed once they do. Self-doubt is emerging as a bigger doubt than market conditions.

26.6%

of our respondents across geographies say their biggest concern is failing due to performance or competence.

2,

Gaming a system they don't respect

89%

of recruiters are planning to use more AI in the hiring process. Whilst candidates are embracing AI to compete, they are simultaneously questioning whether AI-driven hiring is fair, transparent or effective. 36.7% of respondents have a negative view of AI in the hiring process, whilst only 21.9% have an overtly positive view.

3,

AI is replacing careers advice before it replaces jobs

This may be the first generation where the 'first advisor' that they turn to is no longer a person. AI is increasingly shaping career decisions before friends, families, employers or even a search engine. Respondents were nearly twice as likely to use AI for career exploration than interview preparation.

4,

The act of applying has been devalued

Candidates feel like it's a numbers game, and they're right. Future talent are put off by slow, vague and complex hiring processes. However, with the advance of one-click applications can be done without thinking and the act of applying has been devalued.

5,

Human interaction is now a premium experience

Automation is scaling. Human interaction is shrinking. And scarcity is increasing its value. The point candidates value human interaction is the point most employers automate or neglect.

42.8%

said human interaction matters most after an unsuccessful application.

6,

Connection is craved but feared

In a digitally connected world, social connections are craved and feared in equal measure. Future talent want the social opportunities that work offers, but many feel underprepared for the interpersonal realities of work. Social and interpersonal concerns ranked as the second biggest anxiety source from the data.

The Confidence Crisis is about more than finding a job

26.6% of respondents are most nervous about failing due to performance or competence.

When Future Talent thinks about entering the workforce, their biggest fear isn't the job market: it's personal.

26.6%

OF RESPONDENTS SAID THAT THEIR PRIMARY CONCERN IS FAILING DUE TO THEIR OWN PERFORMANCE OR COMPETENCE.

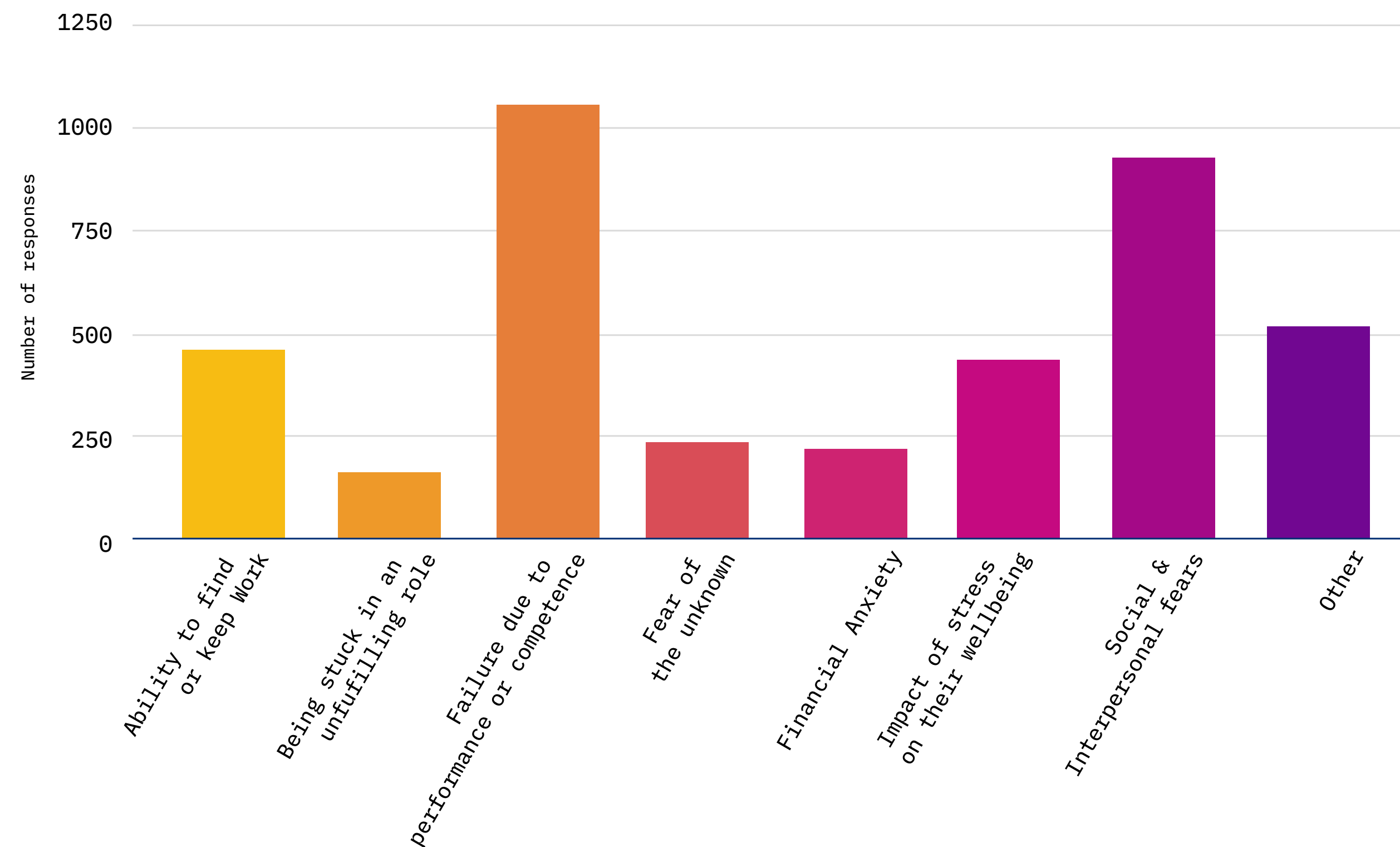
Even as they're surrounded by headlines and horror stories about declining entry-level roles and endless redundancies, that's more than twice the number who are worried about finding or keeping a job.

At the same time,

35.5%

ARE EXCITED BY THE INCOME AND INDEPENDENCE WORK PROVIDES.

What are you most nervous about entering the workforce?



The ambition is there. The desire to build a life is clear.
But confidence isn't keeping pace.

Underneath this sits a quieter tension: around 6% across
markets said that they're nervous about the unknown.

Taken together, this generation isn't lacking drive.
They're a generation questioning whether they're ready.

The anxiety isn't just
"Will I get a job?"

It's "Will I be good
enough when I do?"

For employers, that's a fundamental shift.
Attraction isn't the barrier. Building confidence is.

What are Future Talent most worried about when thinking about entering the workforce?

Q3 CATEGORY	GERMANY	NORDICS	USA	UNITED KINGDOM
Ability to Find or Keep Work	8.91%	13.36%	12.79%	10.66%
Being stuck in an unfulfilling role	5.45%	4.15%	3.38%	2.91%
Failure Due to Performance or Competence	22.85%	27.19%	27.31%	27.14%
Fear of the Unknown	5.24%	4.61%	6.02%	6.54%
Financial Anxiety	6.29%	4.15%	6.19%	4.93%
Impact of Stress on Wellbeing	14.15%	8.76%	9.65%	10.90%
Other	17.09%	17.51%	12.95%	9.45%
Social & Interpersonal fears	20.02%	20.28%	21.70%	27.46%

AI is providing careers advice for those that use it

40.53% of respondents say they don't use AI in their job search

Recent multigenerational research showed that 21% of people are using AI to research companies while 31% are using it to prepare for interviews.

However, when we zoom in on future talent, we notice some interesting trends. Just over 40% of this group are not using AI in their job search process.

59.43%

OF THEM ARE USING AI AT SOME POINT IN THE JOURNEY

This varies across geographies with Germany and the Nordics having a higher prevalence of AI usage than both the US & UK. This generation is not a tech monolith: there's still a lively, polarising debate between those who embrace, or even just accept, AI as a necessary tool for the future, and those who resist it due to its impact on the environment and job replacement.

For those that do use AI, the influence of AI in the candidate experience journey is starting earlier and earlier.

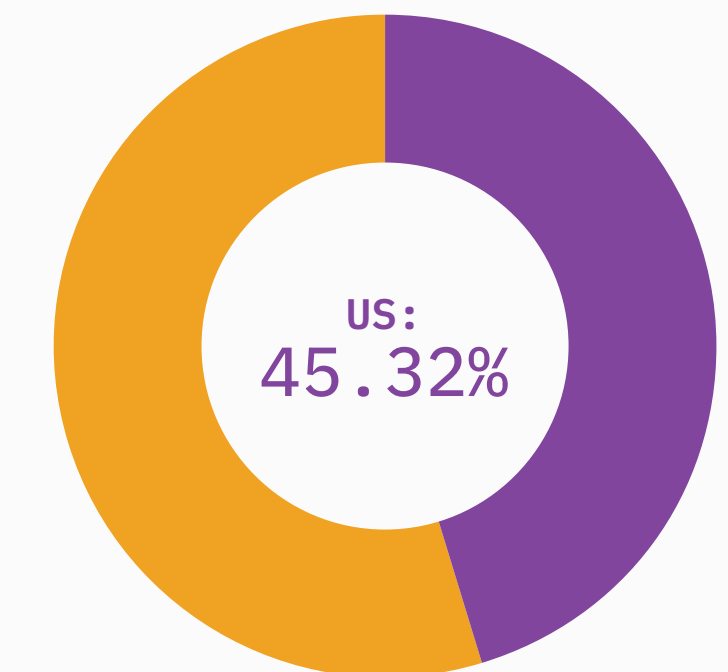
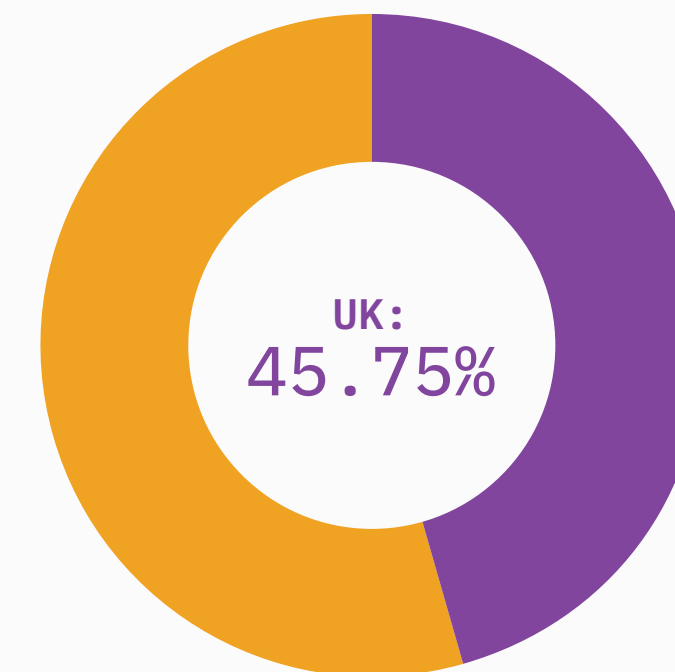
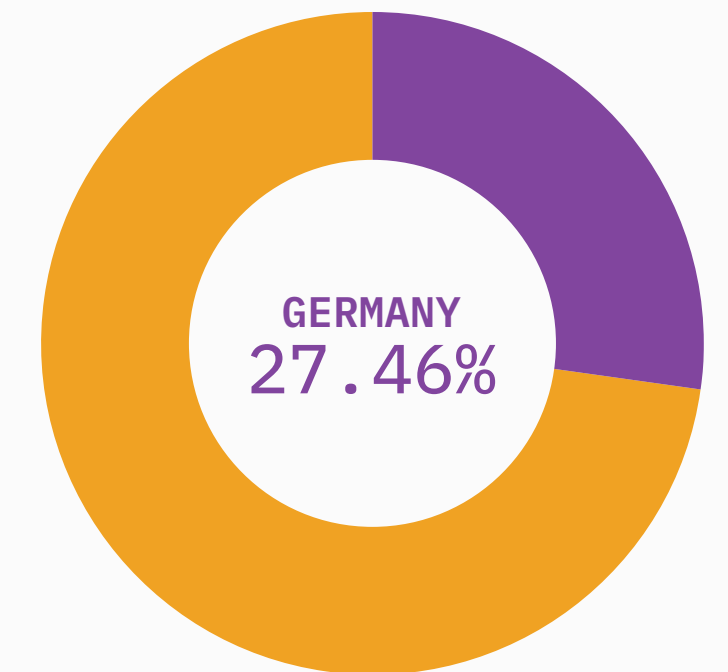
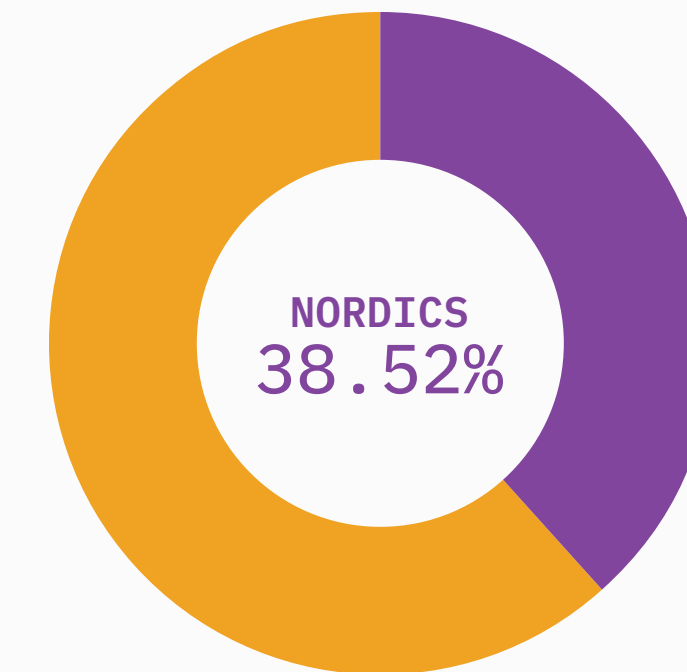
Respondents to our survey were nearly twice as likely to use AI during the career exploration and research phase than for interview preparation. They're turning to AI rather to understand roles, identify opportunities, and assess employers themselves long before they're engaging directly with them.

In many cases, AI is acting as the first filter. This generation is increasingly comfortable navigating large life decisions hand-in-hand with AI tools and trusting it to parse the right information from a world of data. LLMs are shaping which companies are considered, which roles feel relevant and which career paths feel viable.

This may be the first generation where the *'first advisor'* that they turn to is no longer a person.

For employers, this creates a new challenge. Traditionally, career exploration was a shared journey with counsellors and loved ones, researching sites and seeking expansive advice; today, it can be isolated and informed by data condensed into a single, definitive direction. This places unprecedented power in algorithms to define their options before they ever speak to a human. If your brand, roles and messaging aren't clear enough to be surfaced and interpreted in the right way by AI, you're not influencing decisions early on. You're reacting to them later.

Don't use AI



Gaming a system they don't respect

89% of recruiters are planning to use more AI in the hiring process

As recent reports from LinkedIn show, AI is becoming more embedded in future talent hiring.

However, our data shows that only 21.91% of this audience are positive about the use of AI during the process.

21.91%

OF PEOPLE ARE POSITIVE ABOUT AI USAGE DURING THE PROCESS.

Nearly double the number of respondents reported negative perceptions of AI in hiring than positive ones. Candidates are watching peers use AI to embellish, optimise and outperform, producing indistinguishable applications designed to please a tool, not a recruiter. The idea that AI hiring tools skip over qualified candidates in favour of those who hit the right keywords wasn't a fear or hunch for respondents, it was fact.

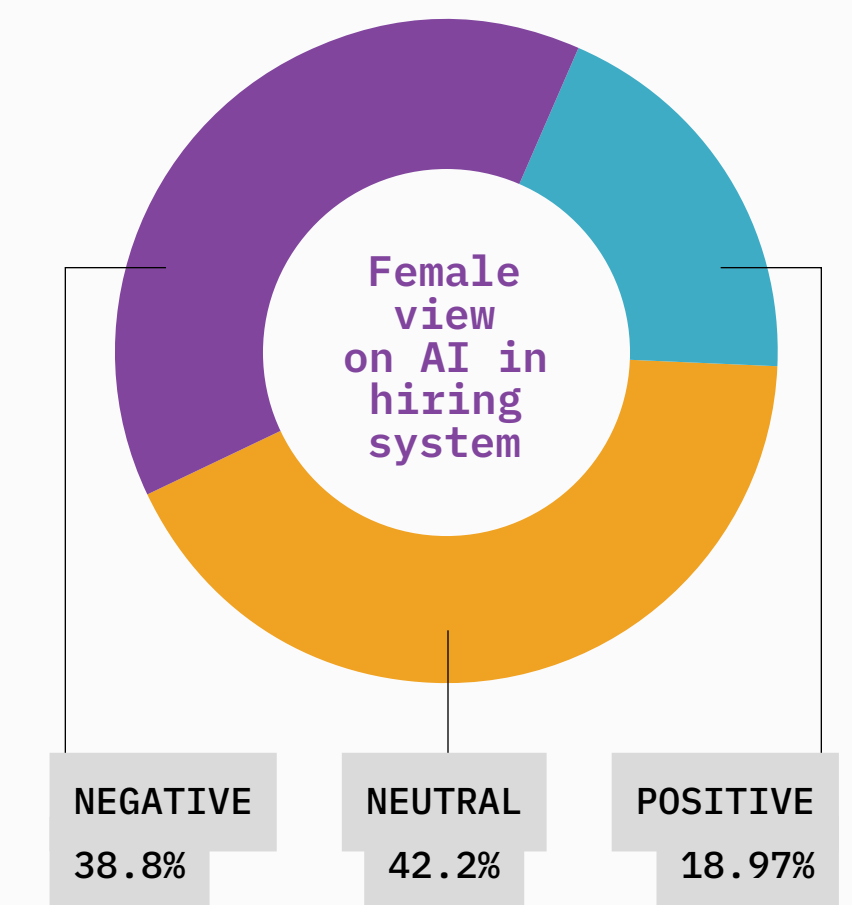
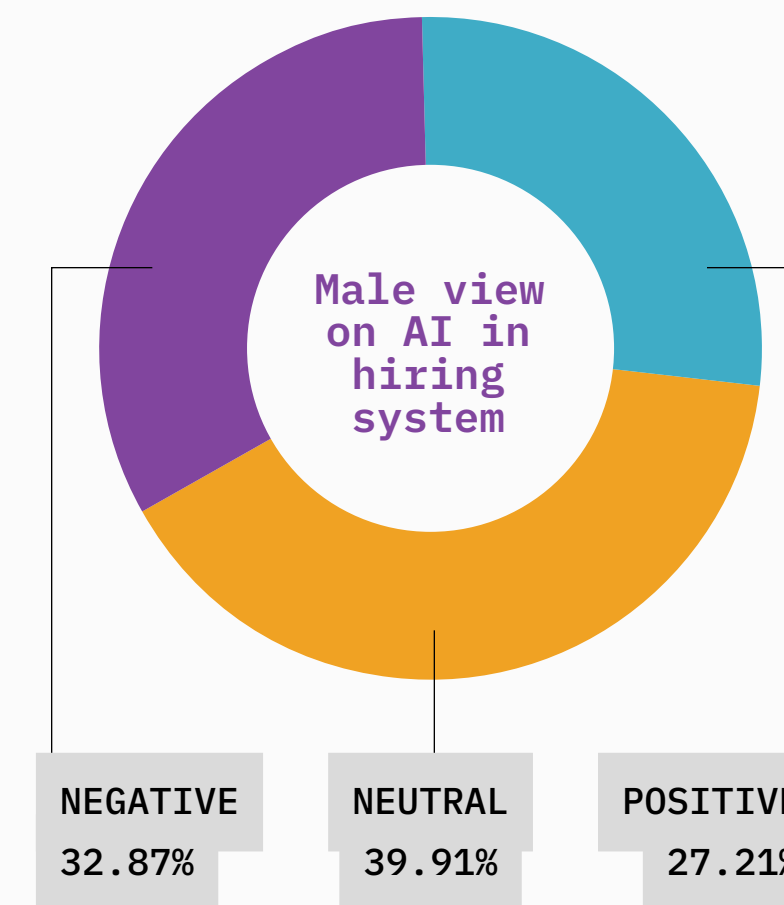
The data shows that whilst there is an overtly negative view for both genders when it comes to using AI in the hiring system, young women are more sceptical. This highlights the need to be inclusive in our system design.

And yet, despite this scepticism, future talent continue to use AI themselves. Not because they trust the system – but because they feel hyperoptimised applications are now the floor, not the ceiling. They feel that opting out means being invisible.

This is where a significant shift lies. AI hasn't just changed candidate behaviour. It's eroded belief in fairness.

For employers, finding the right candidates when everyone is trying to game the system means doing something differently.

Women are more worried about AI in the hiring system than men



The act of applying has been devalued

Candidates feel like it's a numbers game. And the data backs that up. Recent reports show that, on average, candidates are submitting between 30 and 80 applications to secure a role.

THE AVERAGE NUMBER OF APPLICATIONS PER ROLE IS NEARLY 280, **UP 124%** SINCE 2022.

Whilst this paints a picture of the economy and the employer-driven market, it also signals significant behaviour shifts.

Future talent are used to environments where information is instant, applications are streamlined and technology removes effort rather than adding it. Our data shows that a complex or lengthy application process is one of the top three reasons that candidates are put off applying. When there are single-page application tools on the market, even common tools that require several pages of forms and manual input after receiving a CV or resume file feel burdensome.

Across markets the number one aspect that puts people off applying varies by location with a lengthy process being the primary reason putting people off in the US;

NORDICS	Negative perception of company culture
GERMANY	Pay & other conditions
UK	Pay & other conditions
US	Lengthy application process

But we believe here is more to it than that. Candidates are submitting higher volumes of applications with lower emotional investment than before.

As applying becomes easier and faster, it also becomes less meaningful.

“I don't know if any applications are seen by a human so I do as many as I can”.

In a race to the bottom on speed and volume, the competitive edge is clear. Bringing value and meaning back into the application process will help heal a broken system.

Human interaction is becoming a premium experience

42.8% said human interaction matters most after rejection

Automation is scaling. Human interaction is shrinking. And scarcity is increasing its value.

Respondents said visible or excessive use of AI in hiring is a top-5 reason candidates are put off applying. As companies invest more in integrating AI throughout their hiring process, young talent is reaching breaking point.

Building on the previous signal, the importance of human interaction in the candidate experience is widely acknowledged. But it's often prioritised in the wrong place.

We often overload successful candidates with human interaction but when asked where human interaction would be most valuable, it wasn't at a careers event or hiring manager interaction; it was to **seek feedback after an unsuccessful application**. This was the single most important moment.

Human interaction is becoming a premium experience.

Candidates don't just want it. They're yearning for it. And they want it when it matters most. Whilst they're preparing for an interview. Or when an employer has said no. Whilst there is nuance across markets, there is a lot of consistency.

To help them build confidence. To reassure them that they are good enough. And to give practical guidance.

Time is scarce but building confidence in the next generation is imperative and employers who do can expect their reputation to be enhanced.

Top 3 moments for human interaction across markets

NORDICS	USA	UNITED KINGDOM	GERMANY
As part of the screening and selection process	As part of the screening and selection process	To give feedback on an unsuccessful application	At a careers event - virtual or in-person
To help preparing for an interview	Hiring manager interaction before Day 1	To help preparing for an interview	To give feedback on an unsuccessful application
To give feedback on an unsuccessful application	To help preparing for an interview	As part of the screening and selection process	To help preparing for an interview

Human connection is craved but feared

23.28% of future talent are nervous about meeting new people at work

Finally, one of the biggest tensions in the data sits between aspiration and anxiety. Meeting new people and gaining new experiences is one of the elements of work that future talent are most excited about. At the same time, social and interpersonal concerns rank as one of the biggest sources of fear.

This generation has grown up in a world of constant digital interaction, with key developmental years disrupted by COVID and with their entry into the workforce dominated by AI.

The result is a cohort that's constantly digitally connected, but is not sure how to navigate it in the workplace.

This is more pronounced in the UK than other markets, with

27.46%
OF PEOPLE BEING NERVOUS ABOUT
HOW THEY'LL PERFORM SOCIALLY.

Entering the workplace is becoming more than a career step, it's becoming a test of social capability. For many, this is where uncertainty lies and employers have a responsibility to make sure that they're doing what they can to increase confidence and build a sense of human connection.



What can employers do to stand out to Future Talent?

The six signals in this quarter's Barometer point to clear outcomes: many early careers attraction strategies are built for a candidate market that may no longer exist.

Candidates today are more cautious, more sceptical, more digitally fluent and less tolerant of poor experiences than the generations before them. They still want opportunity, but they are approaching it differently.

That means employers need to respond differently too.

There are four practical things that you can be doing to make sure that you're engaging candidates correctly, and on their terms.

1, Building confidence requires a system shift

Many organisations still invest heavily in awareness and attraction, assuming that by doing so they will encourage the right candidates to apply.

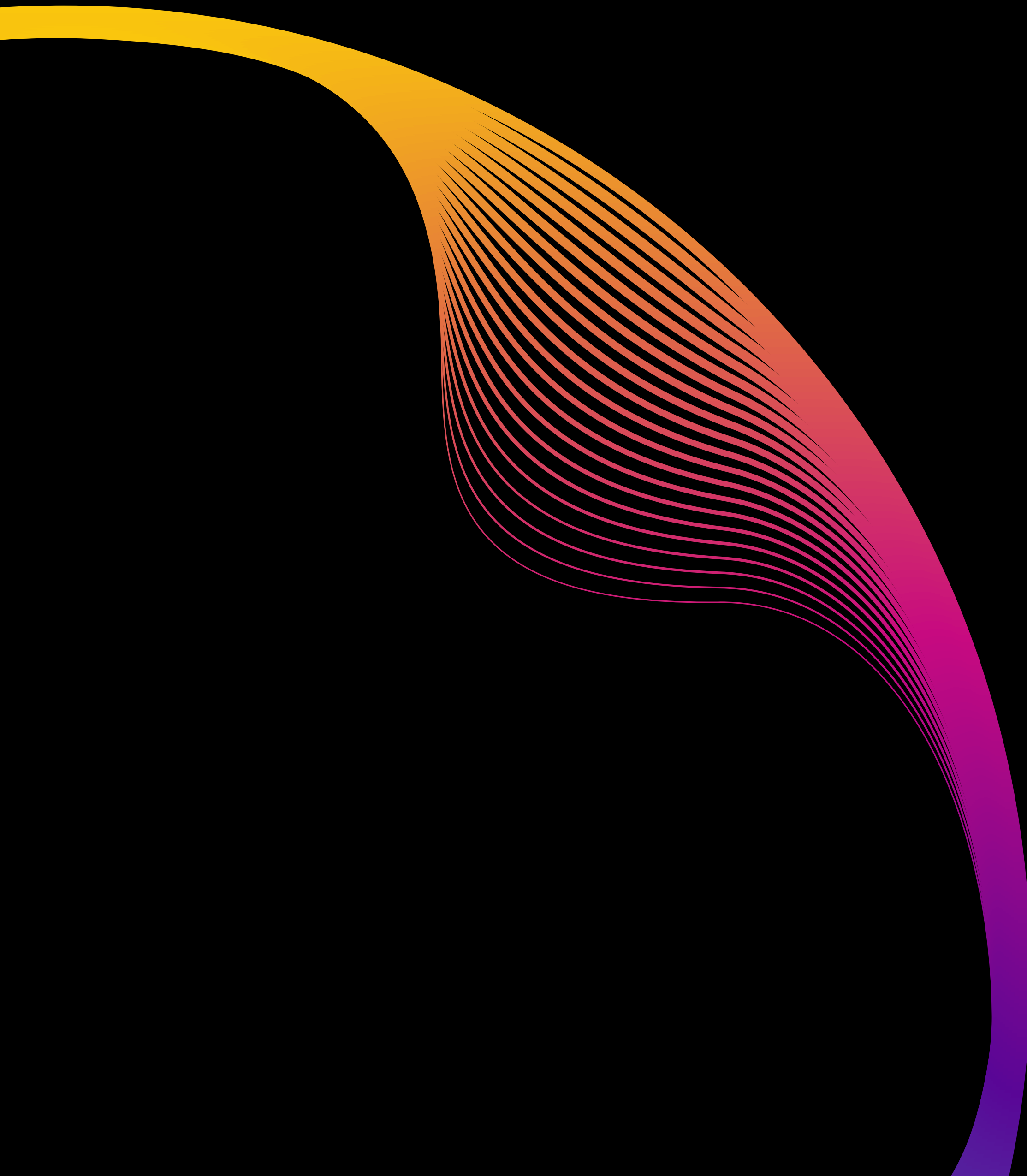
The data suggests something else. Confidence of choice is becoming a more significant barrier than visibility. Future talent are worried about whether they are capable of succeeding once they enter the workplace, more than whether they can secure a role.

This requires a shift from selling opportunity to supporting readiness.

Employers should focus on making the transition into work feel more achievable and less intimidating. That means clearer expectations, visible development pathways, stronger onboarding experiences and early support structures that reduce uncertainty.

This will require education providers and employers working together in a closer way. Connecting the skills that they need in the workplace with what they are learning in the classroom.

The employers who win early talent will be those who make success feel possible as well as desirable.



2, Be transparent about how you use AI

AI is firmly embedded in the candidate journey, whether employers actively use it or not.

Candidates are already using AI tools to get advice, to write CVs, prepare applications and research opportunities. But many are deeply sceptical about employers using AI to assess them, particularly when decision-making feels invisible or impersonal.

This creates a trust challenge.

If candidates do not understand how technology is being used, they are more likely to assume the worst: that decisions are unfair or purely efficiency-driven.

Transparency is therefore no longer optional.

Employers should clearly communicate:

- Where AI or automation is used in the process and why
- Where human judgement remains central
- What candidates are being assessed on
- How fairness and bias are being managed
- What candidates can do to submit the strongest application

Even simple transparency can significantly improve confidence in the process.

Candidates have moved past asking “Do you use AI” to “Can I trust how you are using AI in the process”

3, Redesign the system around human moments that matter

We can see from the data that candidates are crying out for human interaction at key points of the hiring system. Most organisations are underestimating the impact of rejection.

As humans, there has been extensive research done on the fact that we are far more likely to remember negative experiences than positive ones.

For candidates, rejection is often the most memorable part of their quest to find a job. It is where they decide whether an employer was respectful, thoughtful and worth re-engaging in the future.

Too often, this moment alongside many others is handled with silence or delayed communication.

One of the key things that employers should do is design the key moments with a human lens;

- Be clear up front about how long candidates should wait to hear
- Where possible, give context that helps people understand the outcome
- Encourage future applications or where they can go to improve key skills they may have fallen short in

Ultimately, the biggest shift is employers treating these key moments in the hiring system as relationship moments rather than administrative tasks.



4, Show up earlier in the journey

Whilst there is a clear divide in audience usage of AI (or not), during the process, we're trending in one direction. More use, earlier in the journey.

That means that employers need to act as the voice of authority earlier in the journey. It means optimising your content for both traditional Search Engine Optimisation (SEO) and Generative Engine Optimisation (GEO) which is the process of ensuring your content shows up when people search for it in LLMs such as Chat GPT.

Some practical tips on how employers can do this:

- Evidence claims with data: AI likes quantifiable stats
- Make content scannable: use clear headings, concise lists and short sentences
- Answer questions, the first 30-80 words of your content should answer a question that a candidate may ask or type into an AI engine
- Use descriptive headings: rather than 'working here' consider 'Why working at Tonic is amazing'

To stand out it involves a shift to being useful rather than promotional.

Thinking ahead

What stands out in this report is not just what future talent want, but how they are experiencing the journey into work.

Across markets, there is a consistent pattern. Confidence is uneven. Trust in hiring processes is not a given. And many of the moments that shape decisions happen before an employer ever has direct contact.

That matters.

Because it suggests that success in early careers is shaped by more than the strength of a campaign or the efficiency of a process. It is influenced by how well the overall system reflects the reality of the people moving through it.

For employers, the opportunity is to look at that system more closely. Not just what is said, but how it is experienced. Where confidence is built or lost. Where trust is reinforced or undermined. And where human interaction carries the most weight.

A useful place to start is with a few simple questions:

- Where in our approach are we actively building confidence, not just attracting attention?
- How clearly are we setting expectations about what success looks like once someone joins?
- At what points in our process does trust feel strongest, and where might it be at risk?
- Where are we relying on automation in ways that may not reflect what candidates value most?
- How visible and useful is our content before a candidate ever engages with us directly?
- Which moments in our process would benefit most from a more human response?

The data in this report does not prescribe a single answer. But it does offer a clearer view of the pressures, behaviours and expectations shaping decisions.

Responding to that with intent, and with a design that reflects those realities, is where advantage now sits.

At Tonic, that is where we focus. Helping organisations interpret signals like these, understand the system they are operating within, and shape approaches that are more aligned to the people they are trying to engage.

This is the starting point. What employers choose to do with it is what will define the outcome.

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thinking, visit our
Future Talent site**

