



# 2025 Report: How Work Wellbeing Fuels Performance

A Strategic Imperative for Sustained Success



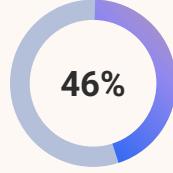
indeed

## Executive Summary

**Today's talent is looking for more than just a paycheck. They want purpose, support, and the opportunity to thrive.**

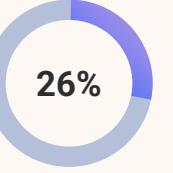
Yet only 26% of employees say they're truly thriving at work. This isn't just a statistic—it's a clear warning sign. When work wellbeing declines, stress increases, people leave, and performance suffers.

But the inverse is also true: when organizations invest in work wellbeing, they unlock higher performance, stronger retention, and greater adaptability. Indeed empowers companies to turn work wellbeing into a competitive advantage.



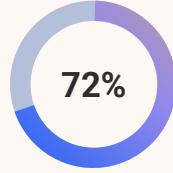
46%

Workers' expectations have evolved, with 46% of people reporting their expectations are higher than just last year; with Gen Z showing an even bigger increase.



26%

Worker wellbeing remains low. Just 1 out of 4 of survey respondents are thriving at work.<sup>1</sup>



72%

Wellbeing & adaptability to AI are connected. Employees at companies that prioritize wellbeing are more likely to be adaptable to AI vs. those that don't (72% vs. 46%).<sup>2</sup>



Wellbeing correlates with financial metrics – from valuation to ROI.



1.5x

People with high wellbeing achieve goals at work **1.5x more often** than those with low wellbeing.



**Taking action: measure, communicate, and invest in** the top three drivers of work wellbeing: energy, belonging, and trust.

Indeed Work Wellbeing Report, based on a commissioned survey (n=4,038 US adults), conducted by Forrester Consulting, 2025.

<sup>1</sup>Note: Thriving or high wellbeing is defined as answering a 4 or 5 across all four work wellbeing indicators (happiness, purpose, satisfaction, stress-free). Respondents rated agreement on a 5-point scale where 5 = Strongly Agree, 1 = Strongly Disagree.

<sup>2</sup>Note: High adaptability is defined as having a score of 3.5+ on a composite scale that averages ratings from 1 to 5 given to different statements related to adaptability to AI

## Report topics

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1.

[The Rise of Work Wellbeing](#)

2.

[A Wake Up Call: Only 1 in 4 are Thriving](#)

3.

[Power Performance & AI Adaptability](#)

4.

[Work Wellbeing Attracts Talent](#)

5.

[Summary & Taking Action](#)



**Work Wellbeing Report**, based on a commissioned survey (n=4,038 US adults), conducted by Forrester Consulting, 2025. Additional methodology details can be found in the [appendix](#).

## Defining work wellbeing

With guidance from leading happiness and wellbeing experts, we measure work wellbeing through four key indicators: **happiness, satisfaction, purpose, and stress.**

*"A composite of these four items is the perfect holistic measure of employee wellbeing. This approach aligns with how policy-makers and statistical agencies across the OECD measure varying dimensions of general wellbeing."*



**Dr. Jan-Emmanuel De Neve**

Professor of Economics & Behavioral Science, Director of the Wellbeing Research Centre at the University of Oxford



Positive Affect

**Happiness**

"I feel happy at work, most of the time"



Evaluative Wellbeing

**Satisfaction**

"I feel completely satisfied with my work"



Eudaimonic Happiness

**Purpose**

"My work has a clear sense of purpose"



Negative Affect

**Stress-free**

"I feel stressed at work, most of the time"



This is bigger than employee experience. This is about staying competitive in the market, staying ahead in AI, and staying in business.”



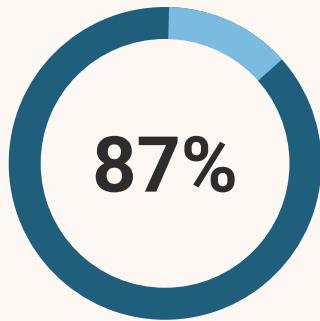
**Kyle M.K.**  
*Indeed Senior Talent Advisor*

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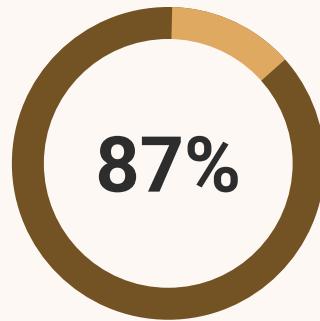
The Rise of Work  
Wellbeing

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**Today's talent craves more than just a paycheck; they're driven by an optimism that happiness at work is possible for them.**



Agree that work can provide  
more than a paycheck



Report it's important to find  
companies that care  
about how you feel

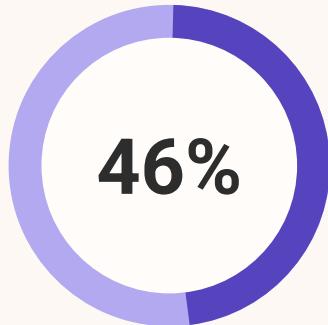


Believe it's possible for people to  
be happy at work, most of the time

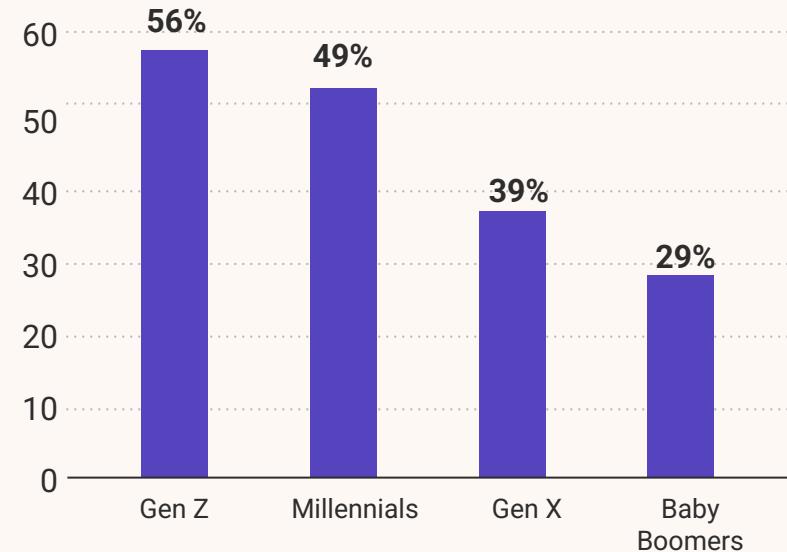
## A Lasting Shift

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Even in an employer-dominated market, job seekers' expectations are still rising, signaling people's expectations for work wellbeing are resistant to market dynamics.



Of people report their work wellbeing expectations are [higher than they were just one year ago](#)

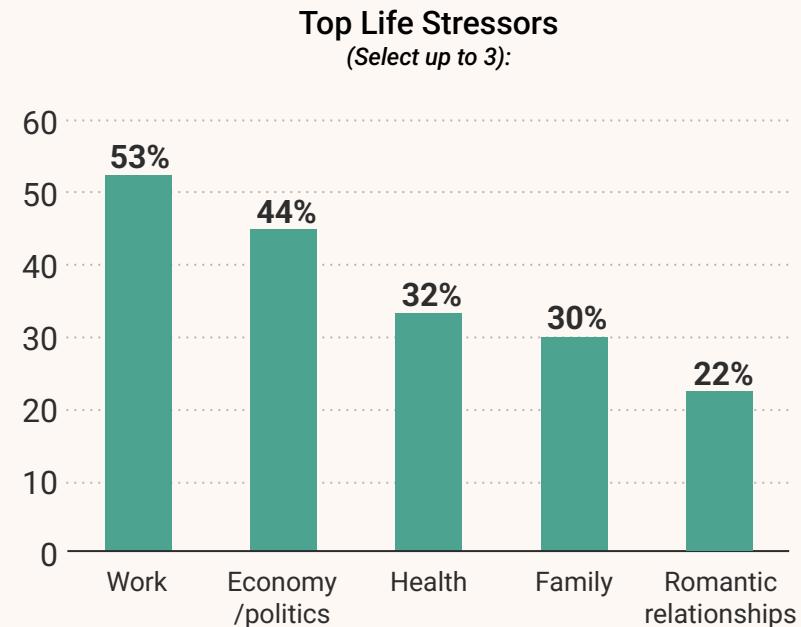


Indeed Work Wellbeing Report, based on a commissioned survey (n=4,038 US adults), conducted by Forrester Consulting, 2025.

## Work As A Top Stressor

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And for good reason. Work is still the #1 stressor for people on a daily basis, despite heightened economic and political conditions.

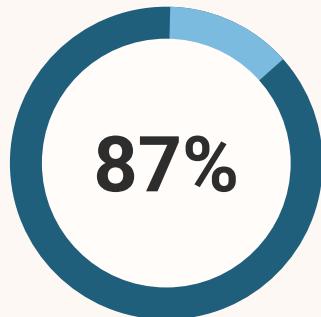


Indeed Work Wellbeing Report, based on a commissioned survey (n=4,038 US adults), conducted by Forrester Consulting, 2025.

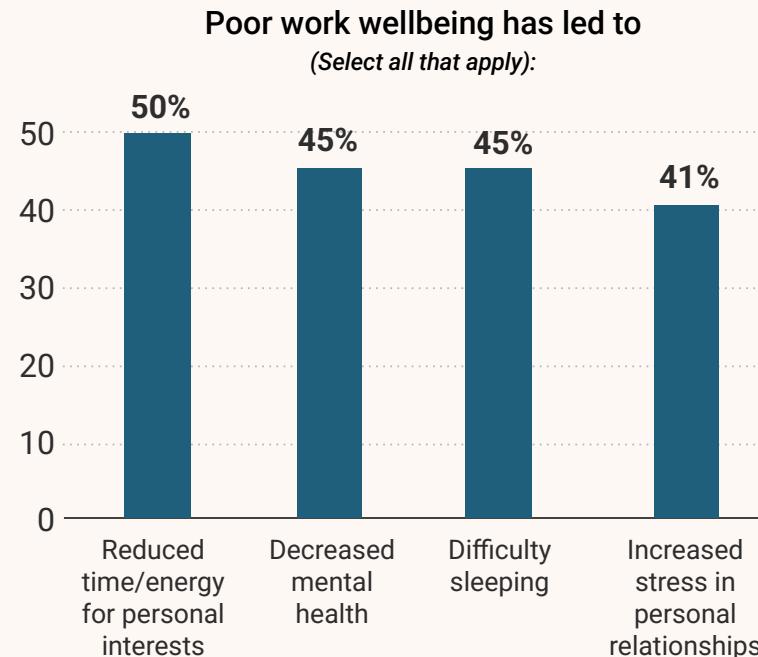
## Work-Life Feedback Loop

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How we feel at work impacts how we feel at home, with low work wellbeing often spilling into our personal lives and having detrimental effects.



Report their happiness at work affects their mood at home

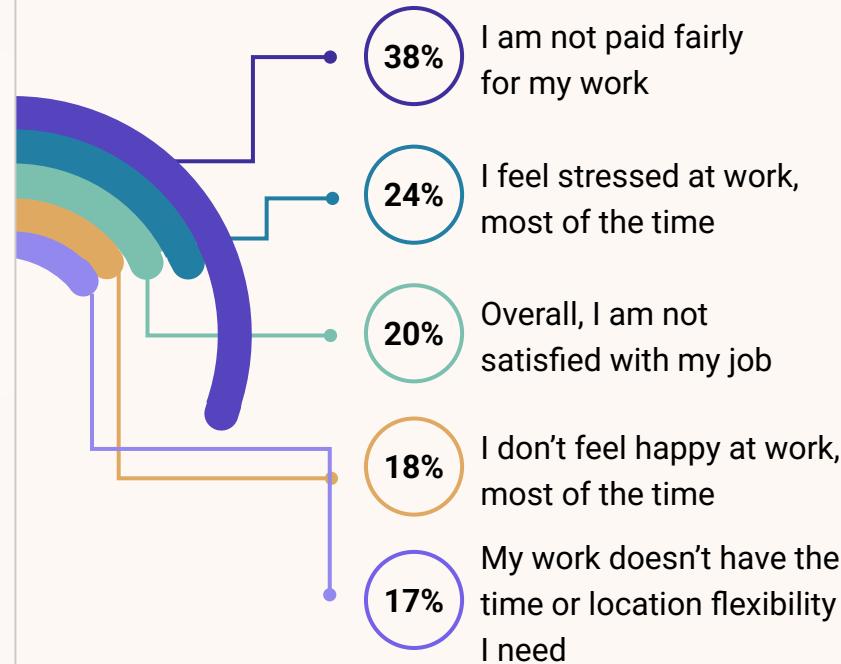


Indeed Work Wellbeing Report, based on a commissioned survey (n=4,038 US adults), conducted by Forrester Consulting, 2025.

## Low Wellbeing Fuels Exits

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**Second only to pay,  
high stress is the  
leading reason  
employees begin to  
look for a new role.**



Indeed Work Wellbeing Report, based on a commissioned survey (n=4,038 US adults), conducted by Forrester Consulting, 2025.

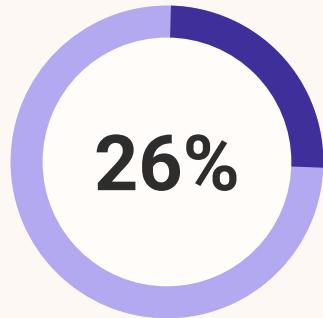
Note: Base for "Could you please tell us more about the reasons why you would consider new opportunities?" (n=3,369).

02

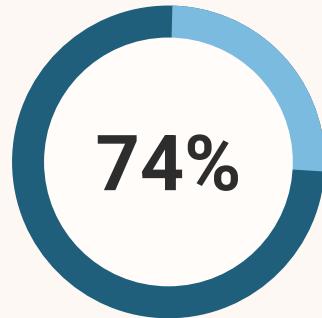
A Wake-Up Call:  
Only 1 in 4 Are Thriving

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**Only 26% of people are thriving at work, with many feeling low happiness, high stress, low purpose, or low satisfaction.**



Of people are thriving at work



Of people are not thriving at work

Indeed Work Wellbeing Report, based on a commissioned survey (n=4,038 US adults), conducted by Forrester Consulting, 2025.

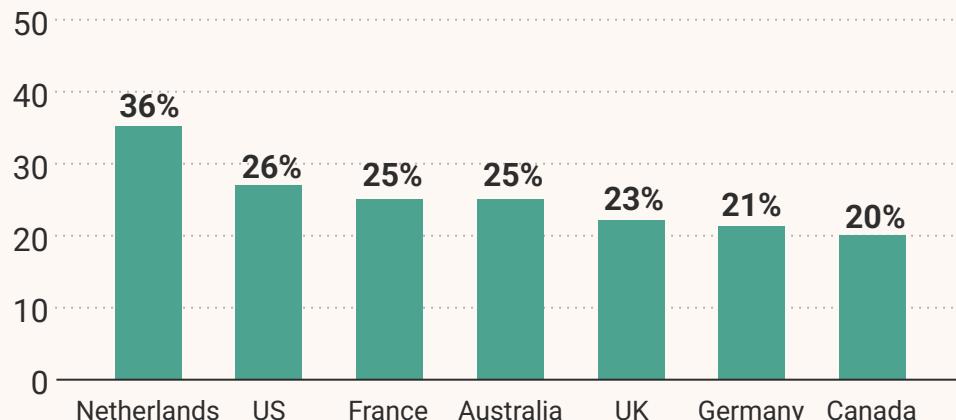
Note: Thriving is defined as answering a 4 or 5 across all four work wellbeing indicators (happiness, purpose, satisfaction, stress-free). Respondents rated agreement on a 5-point scale where 5 = Strongly Agree, 1 = Strongly Disagree.

## Global Comparison

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**Work wellbeing is low across all countries we analyzed; US results align with global levels.**

Percentage of People Thriving at Work



Higher wellbeing/Thriving = agreement on all wellbeing dimensions: feeling happy at work, being completely satisfied with their job, having a clear sense of purpose in their position, and not feeling stressed most of the time (4-5 ratings on happiness, satisfaction, purpose and NOT stressed)

Base: Total respondents

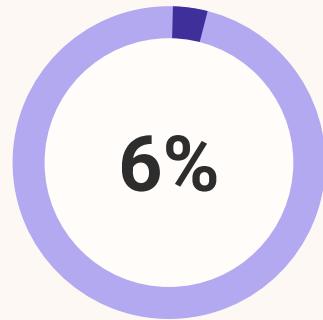
2025: 4,038 US, 1,605 Canada, 1,551 UK, 1,569 France, 1,500 Germany, 1,572 Netherlands, 1,609 Australia

Source: Indeed Workplace Wellbeing Report, based on a commissioned survey, conducted by Forrester Consulting, 2025.

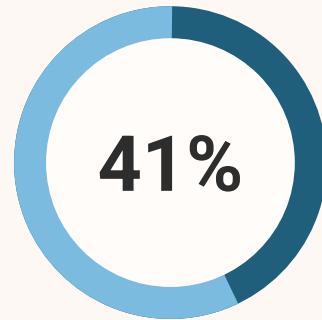
## A Major Stress Gap

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**Employees with lower work wellbeing are nearly 7x more likely to regularly experience stress at work.**



Only 6% of people that report a **higher level** of work wellbeing regularly stress at work



While 41% of people that report a **lower level** of work wellbeing regularly stress at work

## What actually drives work wellbeing?

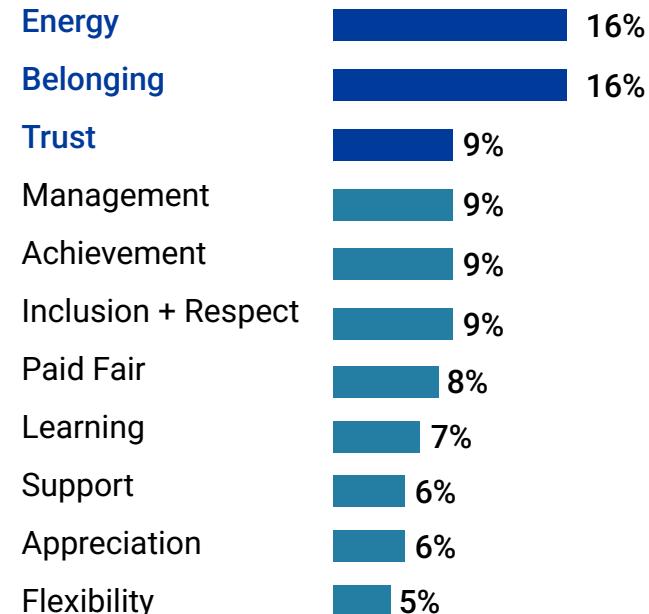
When asked what drives work wellbeing, people often point to “flexibility” & “fair pay”.

**However, when Forrester analyzes what drives work wellbeing statistically, a different story emerges.**

**These three drivers come out on top:**

1. Being **energized** by your work
2. Feeling like you are **part of something**
3. **Trusting** the people who work with you

### Driver Analysis Results

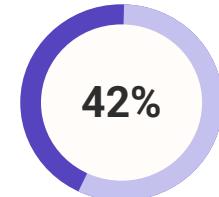


## Barriers to Work Wellbeing

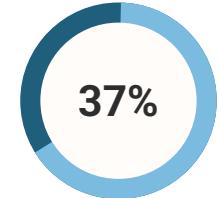
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**Almost half of the workforce struggles with feeling energized, belonging, and trusting people they work with.**

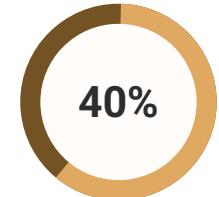
**This represents a clear and actionable barrier to work wellbeing.**



Of workers don't feel energized



Of workers don't feel like they belong



Of workers don't trust people in their company

## A Shared Responsibility

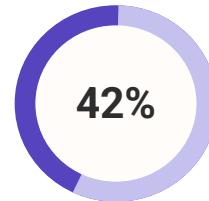
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**While people view wellbeing as a shared responsibility, organizations are expected to lead.**

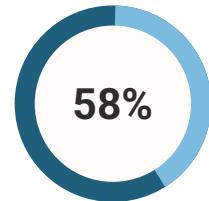
**Everyone plays a role in worker wellbeing:**

Direct managers are expected to contribute most (20%), then executives (14%), along with HR (11%) and the CEO (10%).

**How much impact does each have on an individual's wellbeing at work?**



Individuals themselves



Company responsibility

03

Power Performance  
& AI Adaptability

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**Employees with high wellbeing achieve goals at work 1.5x more often than those with low wellbeing.**

Respondents that indicate a lower level of work wellbeing

vs.

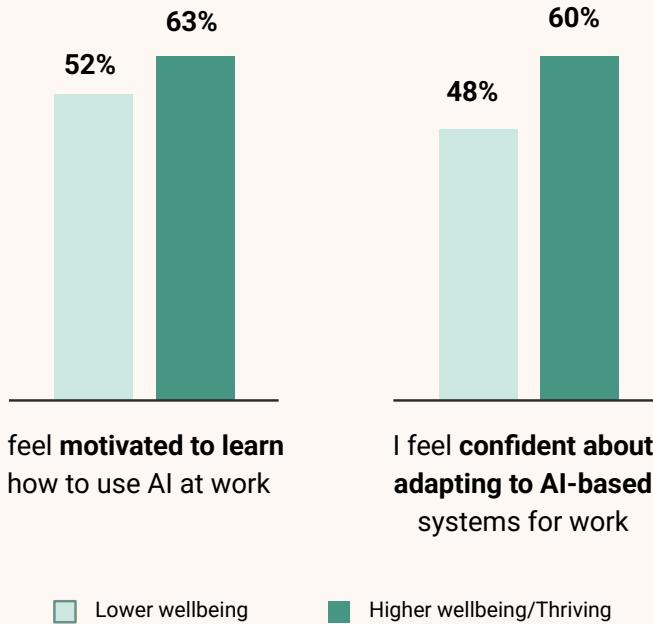
Respondents that indicate a higher level of work wellbeing

62%	Achieving most goals at work	93%
44%	Regularly contribute to improvements or innovations at work	55%

## Productivity: Work Wellbeing Fuels AI Readiness

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People with higher wellbeing are more likely to feel motivated to learn AI tools (11%+) and to feel more confident about adapting to AI-based work (12%+).



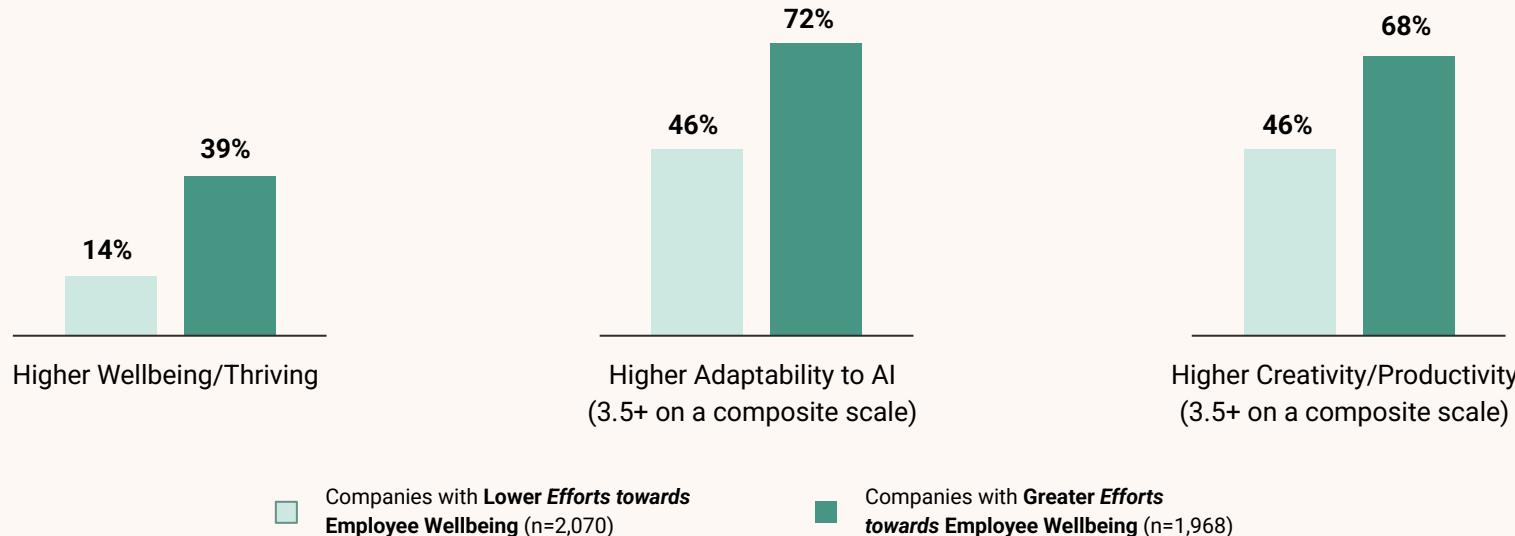
Higher wellbeing = agreement on all wellbeing dimensions: feeling happy at work, being completely satisfied with their job, having a clear sense of purpose in their position, and not feeling stressed most of the time (4-5 ratings on happiness, satisfaction, purpose and NOT stressed). Base: Total respondents: 2,974 Lower wellbeing; 1,064 Higher wellbeing/Thriving.  
Note: Bases vary by statement due to excluding not applicable responses.

Source: Indeed Workplace Wellbeing Report, based on a commissioned survey, conducted by Forrester Consulting, 2025.

## Productivity: Adaptability & Creativity

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**Companies that prioritize and measure employee wellbeing are almost 3x as likely to excel in wellbeing and 1.5x more likely to score high on employee adaptability to AI and creativity/productivity.**



## Retention: Likelihood to Stay

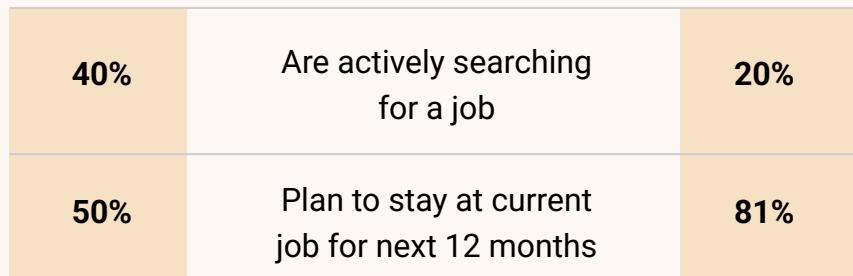
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**People with low  
wellbeing are 2x  
more likely to be  
searching for a job.**

Respondents that  
indicate a **lower level**  
of work wellbeing

vs.

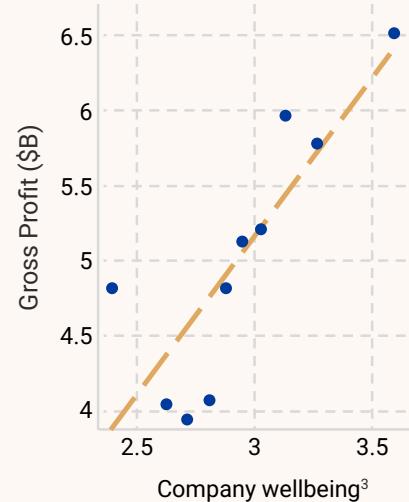
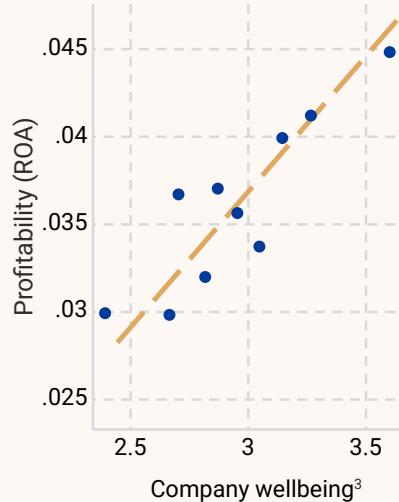
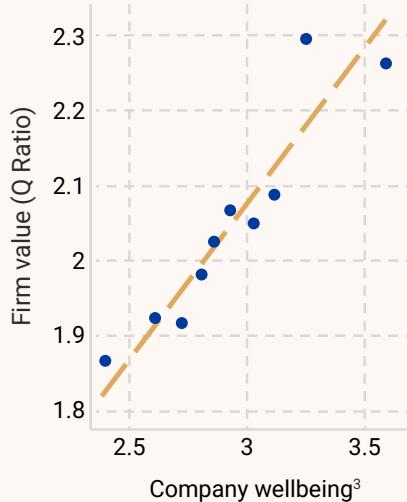
Respondents that  
indicate a **higher level**  
of work wellbeing



## The Broader Business Case

Oxford researchers studied Indeed's dataset and found greater employee wellbeing is tied to higher company valuation, higher return on assets, and greater profits.

### Company wellbeing and business performance (based on US survey respondents)



The analysis looked at 1,782 publicly listed companies in the United States using data from around one million employee surveys across these organizations.

<sup>3</sup>Composite metric of happiness, satisfaction, purpose, and stress

Source: [Workplace Wellbeing and Firm Performance](#); University of Oxford, July 2024.

04

Work Wellbeing  
Attracts Talent

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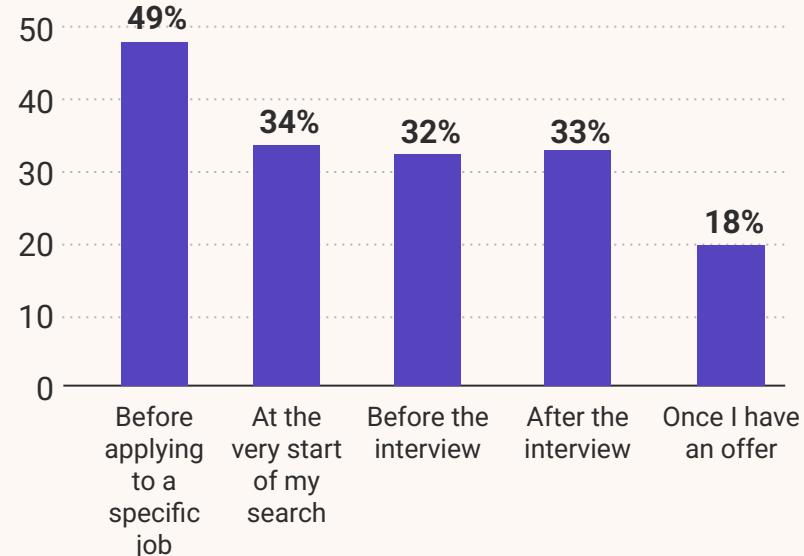
## Talent Attraction: Wellbeing in the Search

97% of job seekers want to see wellbeing data to evaluate companies all throughout their job search; it's most critical before they even spend time applying.



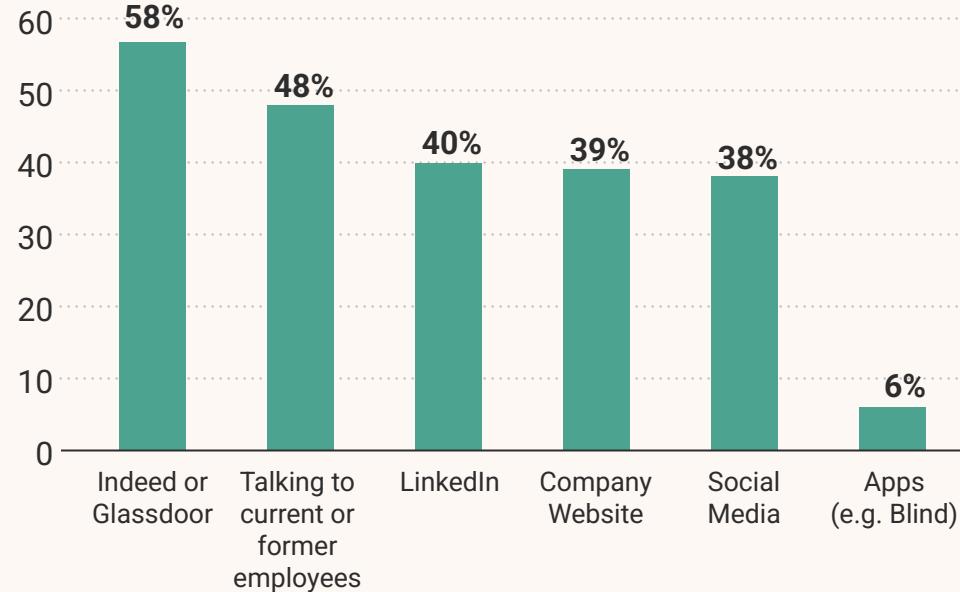
Indeed Work Wellbeing Report, based on a commissioned survey (n=4,038 US adults), conducted by Forrester Consulting, 2025.

When is work wellbeing data most helpful?



**Candidates are evaluating your company's work wellbeing culture using a variety of sources.**

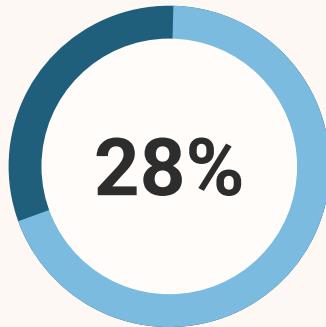
What platforms or resources are you using to evaluate company wellbeing?



## Talent Attraction: Interviews

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Candidates are looking for cues from the interviewers to assess a company's work/life balance ranging from how the interviewer acts to what they discuss.

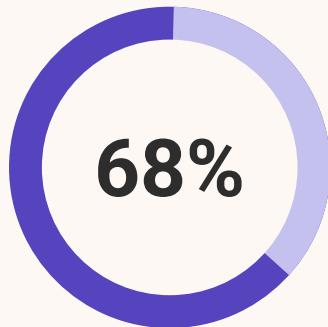


Only 28% of people report they always or often ask the interviewer about work wellbeing

What signals do you count on most to get a sense of a company's work wellbeing when interviewing?



Two thirds of people expect employers to prioritize wellbeing; tangible signs of prioritization include high retention, low burnout, and flexible working



68% of people absolutely believe companies have a responsibility to create environments where people can thrive

### What would make you believe a company is truly prioritizing work wellbeing?



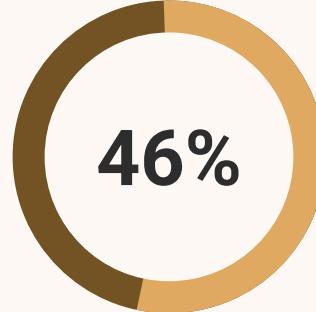
## Trust in Work Wellbeing Efforts

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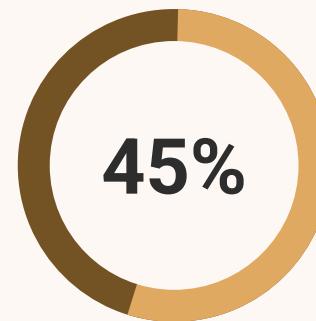
**While there is a strong skepticism that companies care actually about work wellbeing, almost half of people report their company is taking some form of action.**



Believe most companies genuinely care about work wellbeing & prioritize it seriously



My company is doing all it can to improve employee wellbeing



My company measures work wellbeing

05

# Summary & Taking Action

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## Summary

Ultimately, the future is unknown. But it is clear that companies that prioritize people are more adaptive, score higher on all critical HR KPIs, and consistently outperform the market.



## Indeed Work Wellbeing Score

# The world's largest data set on work wellbeing<sup>5</sup>

- Developed with leading happiness and wellbeing experts at Oxford University, Indeed's Work Wellbeing Score measures how people feel at work – and why
- Indeed has collected **over 285M million data points** from more than 30 million individuals globally, and counting

<sup>5</sup>2025 Indeed.com Data, Based on number of survey responses globally

The screenshot shows the Indeed Work Wellbeing Score for the company Wavewood. At the top, there's a navigation bar with links for 'Indeed', 'Find jobs', 'Company reviews', 'Find salaries', 'Upload your resume', 'Sign in', and 'Employers / Post job'. Below this is a company profile section for Wavewood, featuring a logo, a '72' rating, and a '4.2' star rating. It includes links for 'Snapshot', 'Why Join us', '12.3K Reviews', '34K Salaries', 'Benefits', '1,234 Photos', '170.3K Jobs', '8.9K Q&A', and 'Interviews'. A 'Follow' button and a link to 'Get weekly updates, new jobs, and reviews' are also present. The main content area is titled 'Work wellbeing' and states 'Results based on 1.9K responses to Indeed's work wellbeing survey. [Learn more about work wellbeing.](#)' It displays four metrics: 'Happiness' (above average), 'Satisfaction' (above average), 'Purpose' (below average), and 'Stress-free' (above average). Below these are sections for 'About the company' with a photo of an office and a CEO, and three survey results with 1-5 scales: 'My work has a clear sense of purpose.', 'I feel happy at work most of the time.', and 'I feel satisfied at work most of the time.' Each survey result includes a 'Strongly disagree' and 'Strongly agree' option at the ends of the scale.

## Taking Action

# Your strategic data partner in work wellbeing measurement & branding

1. **Measure** work wellbeing and benchmark your performance
2. **Invest** in top work wellbeing drivers (energy, belonging, trust)
3. **Activate** wellbeing in your Employee Value Proposition, interview process, and AI strategy

Indeed for employers Post a job Find resumes Solutions Resources Help Sign in For job seekers

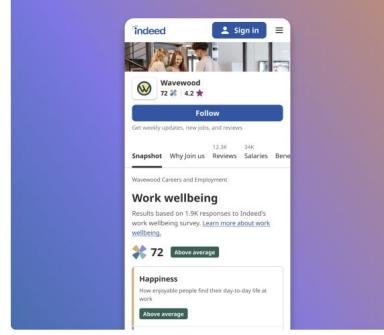
### Indeed Work Wellbeing Score

## Discover work wellbeing

Developed in partnership with leading happiness and wellbeing experts, the Work Wellbeing Score measures how people feel at work.

Available for thousands of companies on Indeed, these insights guide job seekers to companies where they can thrive and helps employers build better work cultures that attract, nurture, and retain talent.

[Browse companies](#)



**Fueled by the world's largest study of work wellbeing<sup>1</sup>**

**How people feel at work-and why**

The Work Wellbeing Score is a composite metric on Indeed Company Pages that measures the key outcomes of work wellbeing: happiness, purpose, satisfaction, and stress.

We also measure and display key drivers that lead to wellbeing at work: accomplishment, appreciation, belonging, energy, fair pay, flexibility, inclusion and respect, learning, support and encouragement, trust, and being well-managed.

Take the first step in prioritizing work wellbeing by sharing the survey with your workforce today.

[Work wellbeing survey](#)





**Companies that lead on  
wellbeing don't just retain  
talent—they outperform  
the market.**

indeed



# Appendix:

## About Indeed and Methodology

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## About Indeed

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Indeed is the No. 1 job site in the world<sup>6</sup> with over 615M Job Seeker Profiles<sup>7</sup>. 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 and the power of human judgment and connection.

**615M**

**Job  
Seeker  
Profiles**

Indeed data (worldwide), job seeker accounts with a unique, verified email address

**#1**

**job search app  
on iPhone or  
Android in 25  
countries**

Business Category,  
SimilarWeb, June 2023

**6**

**jobs added  
every second,  
worldwide**

**60+**

**countries  
reached where  
Indeed has  
sites and**

**28 languages**

**24M**

**total jobs  
on Indeed**

**4.1M**

**new jobs  
added each  
month, in  
the US**

**6.3M**

**Indeed Apply  
applications  
completed  
each day  
on mobile,  
worldwide.**

**24.1M**

**phone  
interviews on  
Indeed  
worldwide**

Source: <sup>6</sup>Comscore, Total Visits, March 2025

Source: <sup>7</sup>Indeed data (worldwide), job seeker accounts with a unique, verified e-mail address

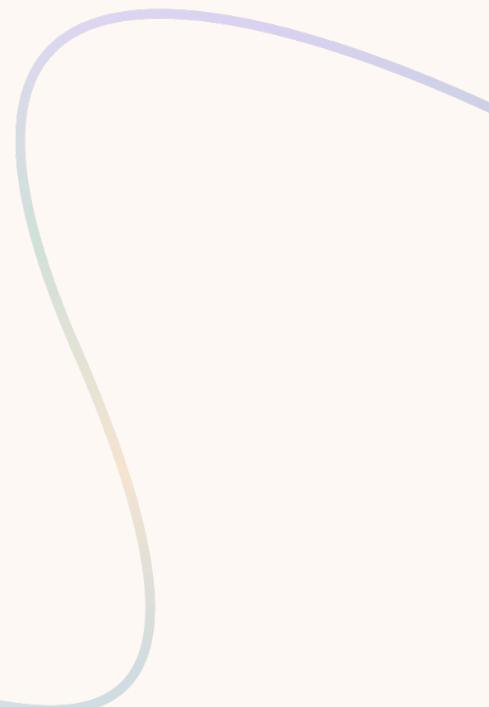
January 2022 - March 2025

## Methodology

The Work Wellbeing Survey is a commissioned survey conducted online by Forrester Consulting on behalf of Indeed, fielded in February – March 2025. This is our fifth annual survey and report.

Forrester Consulting surveyed active workforce (adults ages 18+ who reported working full-time or part-time): n= 4,038. To ensure a representative sample, quotas were set by age, gender, geography, education and income.

The survey explored a variety of topics related to wellbeing at work, including general perspectives on work wellbeing, drivers of work wellbeing, impact of work wellbeing at work on business results, different aspects of stress at work, the relationship between work wellbeing and job search, and work wellbeing and AI / adaptability.



## Appendix

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### 2025 Demographics

	US	Canada	UK	France	Germany	Netherlands	Australia
<b>Average Age</b>	40	41	41	41	41	42	40
% Female	48%	48%	48%	47%	48%	50%	47%
% Working full-time (35+ hours per week)	78%	82%	68%	80%	70%	56%	72%
% Working part-time (less than 35 hours per week)	22%	18%	32%	20%	30%	44%	28%
Live in urban location (large city/small city or town)	51%	71%	64%	45%	58%	81%	64%
Higher education level	62%	51%	58%	69%	27%	49%	51%
<b>Income level:</b>							
Low	25%	19%	31%	28%	27%	14%	14%
Medium	33%	40%	30%	23%	24%	29%	42%
High	42%	40%	37%	47%	47%	39%	42%

Base: Total respondents

2025: 4,038 US, 1,605 Canada, 1,551 UK, 1,569 France, 1,500 Germany, 1,572 Netherlands, 1,609 Australia

Source: Indeed Workplace Wellbeing Report, based on a commissioned survey, conducted by Forrester Consulting, 2025.

Note: Income categories are defined as low income = up to \$40,000 household income; medium income = \$40,000 to less than \$80,000; high income = \$80,000 and above.

## Implications

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# Only 26% of Employees Are Thriving at Work



### Insight

The vast majority (74%) of the workforce is not thriving—reporting low happiness, high stress, low satisfaction, or lack of purpose.



### Implication

Most companies are operating with under-optimized human capital, which can negatively affect performance, engagement, and retention. This signals an urgent need for leaders to act before productivity and talent loss deepen.

# Three Core Drivers of Work Wellbeing: Energy, Belonging, and Trust



## Insight

While flexibility and fair pay are perceived as important, the **top predictors** of wellbeing (and thus performance) are:

- **Energy** (feeling energized by work)
- **Belonging** (feeling part of something)
- **Trust** (trusting coworkers and leadership)



## Implication

Executives must **rethink culture and leadership**—embedding these drivers into management practices, team dynamics, and job design to create a high-performing environment.

## Work Wellbeing Is a Strategic Lever for AI Readiness and Adaptability



### Insight

Employees with high wellbeing are significantly more motivated (by 11%) and confident (by 12%) to adapt to AI-based systems. Companies with strong wellbeing initiatives are **1.5x more likely** to excel in AI adaptability.



### Implication

As AI transformation accelerates, **wellbeing is a prerequisite—not a perk—for tech adoption and future readiness**. Underinvesting could leave companies digitally lagging.

## Work Wellbeing Boosts Performance and Retention



### Insight

People with high work wellbeing:

- Achieve goals 1.5x more often
- Are less likely to be searching for a new job



### Implication

Wellbeing correlates with **financial metrics**—from valuation to ROI. Investors and boards should view it as a **material performance driver**, not a soft initiative.

## Implications

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# Talent Now Prioritizes Work Wellbeing in Employer Evaluation



## Insight

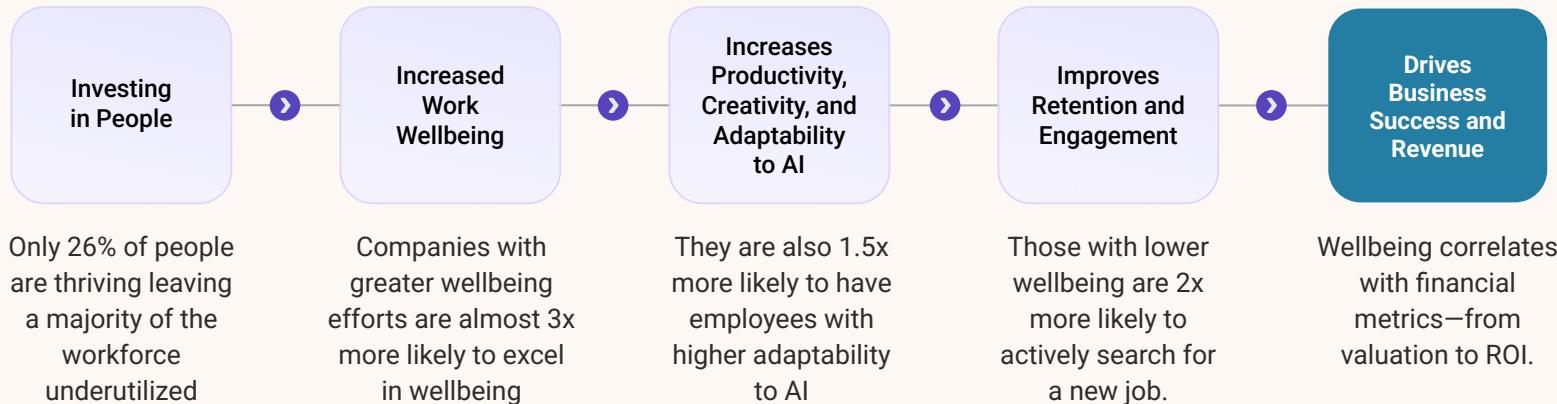
97% of job seekers want to see wellbeing data when evaluating companies—especially *before applying*. Top signals of strong wellbeing include flexible work, high retention, and low burnout.



## Implication

Employer branding must now include **transparent wellbeing data**. Companies that lead here will win top talent, while others risk falling behind in the competitive talent market.

## Investing in employee wellbeing can lead to a more stable, engaged, and positive workforce every step along the way.





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