



2025 Report: How Work Wellbeing Fuels Performance

A Strategic Imperative for Sustained Success

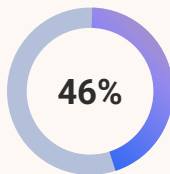


Executive Summary

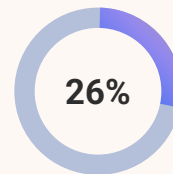
Today's talent is looking for more than just a paycheck. They want purpose, support, and the opportunity to thrive.

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.

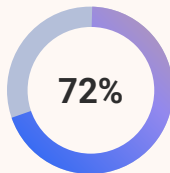
But the inverse is also true: when organizations invest in work wellbeing, they unlock higher performance, stronger retention, and greater adaptability. Indeed empowers companies to turn work wellbeing into a competitive advantage.



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.



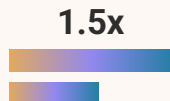
Worker wellbeing remains low. Just 1 out of 4 of survey respondents are thriving at work.¹



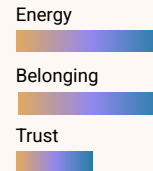
Wellbeing & adaptability to AI are connected. Employees at companies that prioritize wellbeing are more likely to be adaptable to AI vs. those that don't (72% vs. 46%).²



In an Oxford analysis, a simulated portfolio of the **top 100 publicly traded companies with high Work Wellbeing Scores on Indeed** outperform stock market benchmarks.



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.

¹Note: 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.

²Note: 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

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](#).

Context

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.”

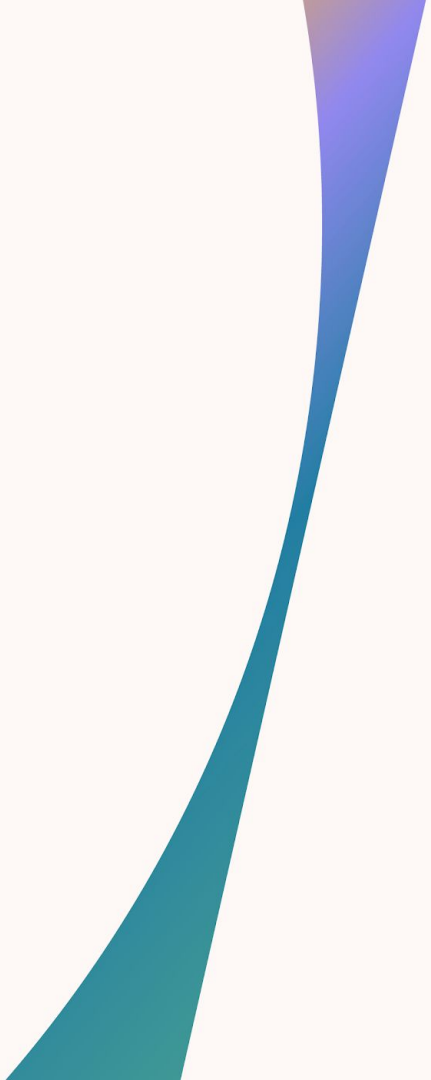


Kyle M.K.

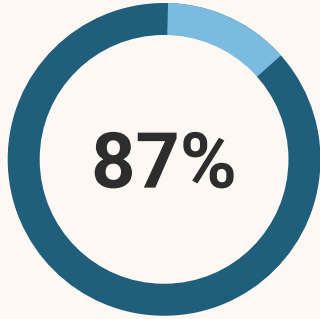
Indeed Senior Talent Advisor

01

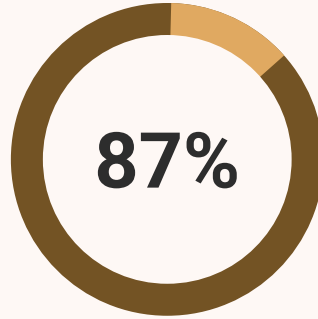
The Rise of Work Wellbeing

A short, horizontal line with a color gradient from orange to blue.

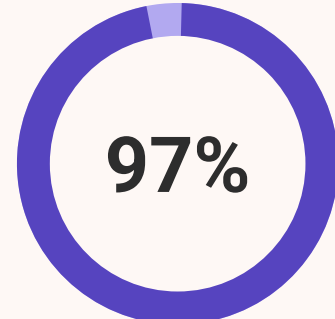
Today's talent craves more than just a paycheck; they're driven by an optimism that happiness at work is possible for them.



Agree that work can provide more than a paycheck



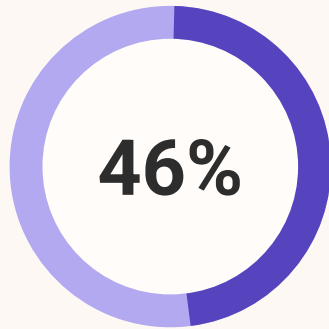
Report it's important to find companies that care about how you feel



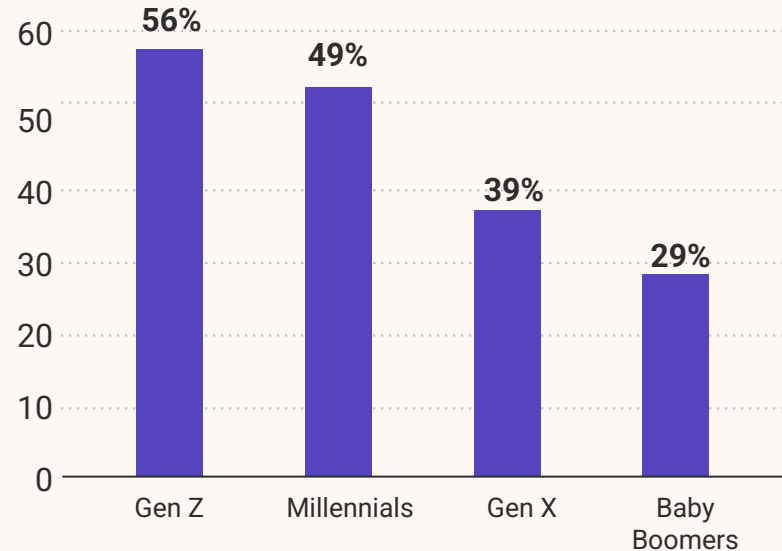
Believe it's possible for people to be happy at work, most of the time

A Lasting Shift

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

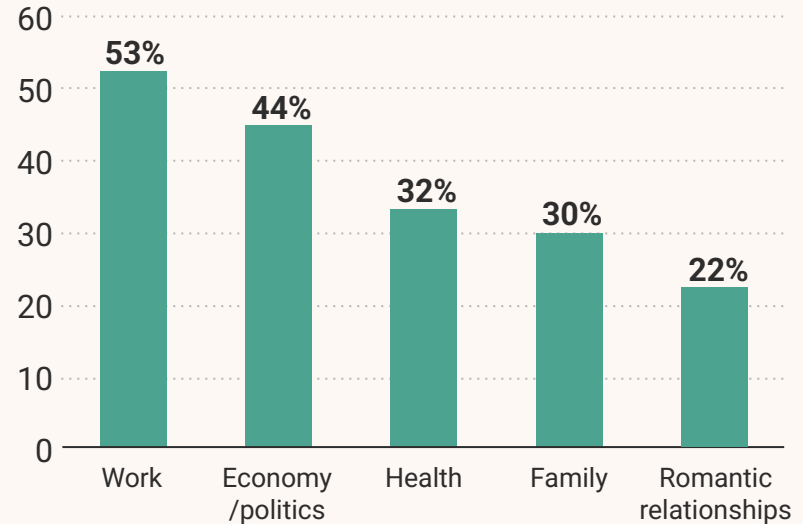


Of people report their work wellbeing expectations are **higher than they were just one year ago**



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

Top Life Stressors
(Select up to 3):

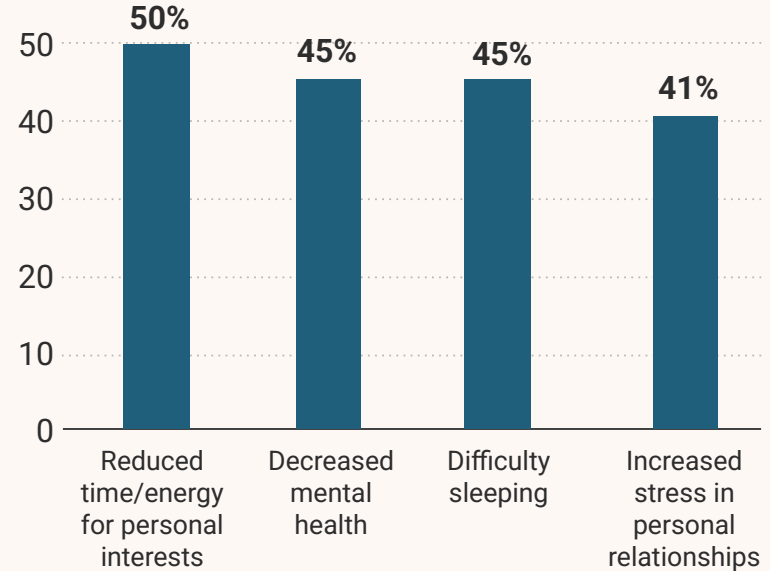


Work-Life Feedback Loop

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.

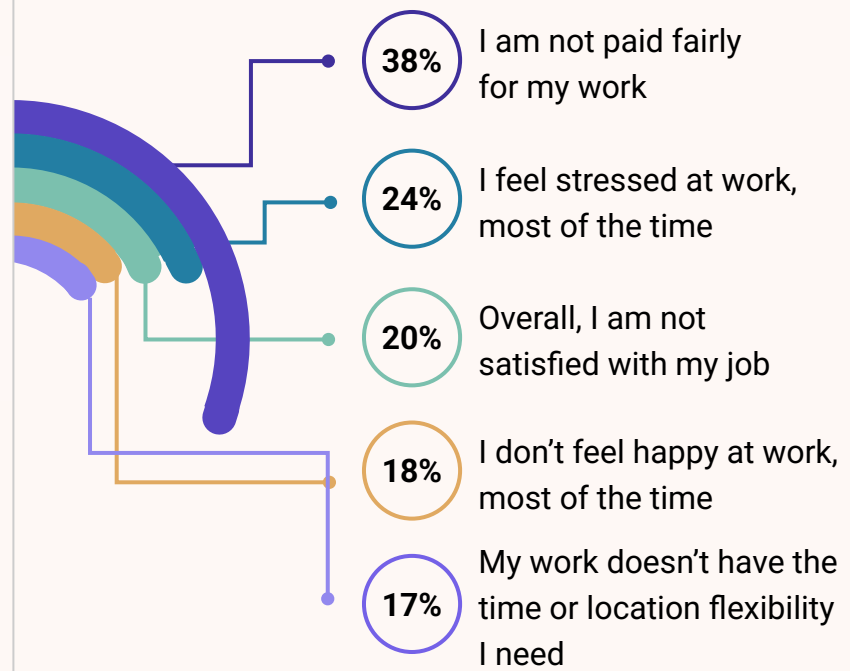


Poor work wellbeing has led to (Select all that apply):



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

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



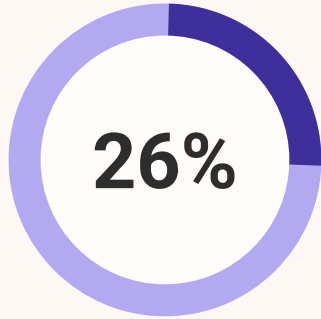
Indeed Work Wellbeing Report, based on a commissioned survey (n=4,038 US adults), conducted by Forrester Consulting, 2025.

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

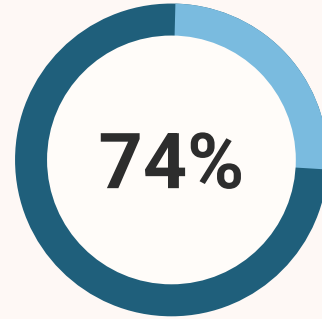
02

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

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



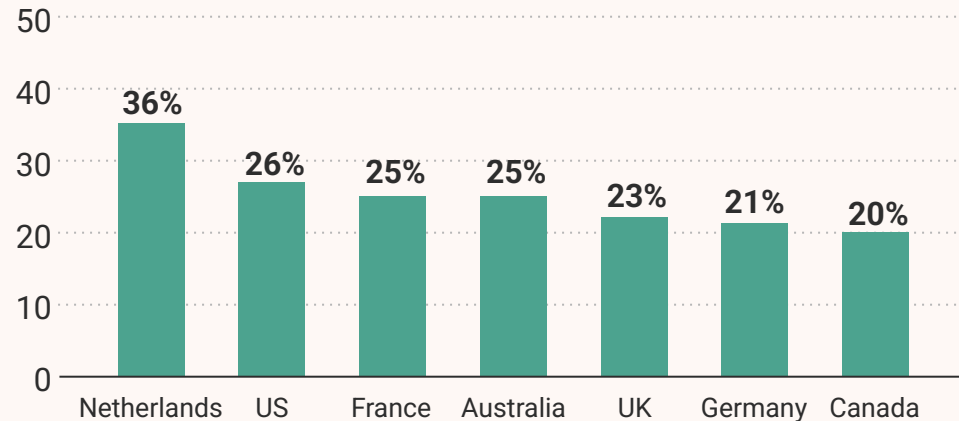
Of people are thriving at work



Of people are not thriving at work

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

Percentage of People Thriving at Work



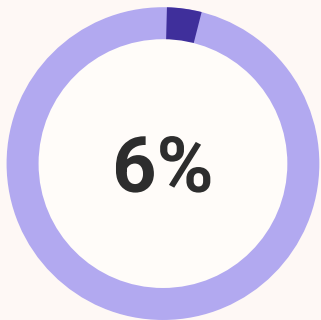
Higher wellbeing/Thriving = agreement on all wellbeing dimensions: feeling happy at work, being completely satisfied with their job, having a clear sense of purpose in their position, and not feeling stressed most of the time (4-5 ratings on happiness, satisfaction, purpose and NOT stressed)

Base: Total respondents

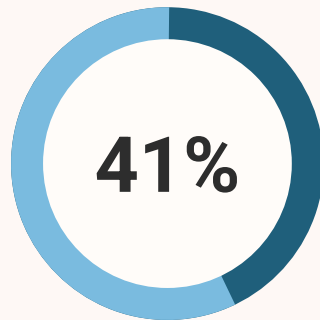
2025: 4,038 US, 1,605 Canada, 1,551 UK, 1,569 France, 1,500 Germany, 1,572 Netherlands, 1,609 Australia

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

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”.

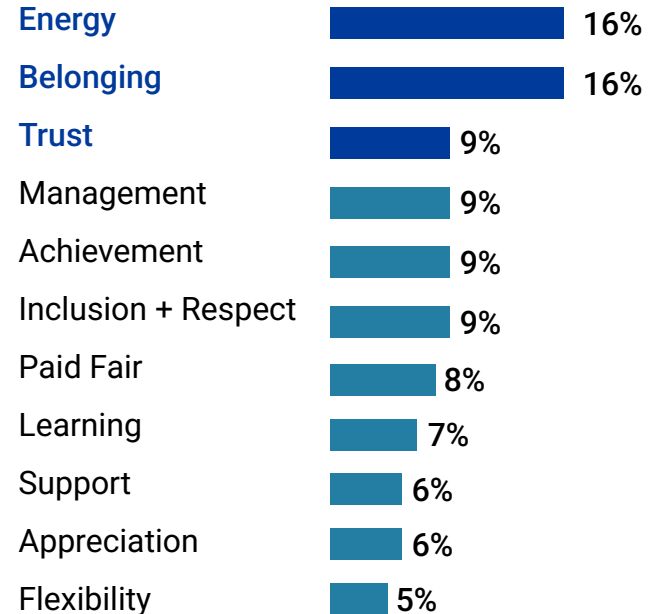
However, when Forrester analyzes what drives work wellbeing statistically, a different story emerges.

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

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

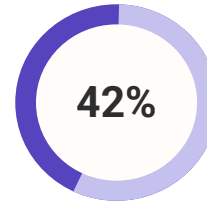
Driver Analysis Results



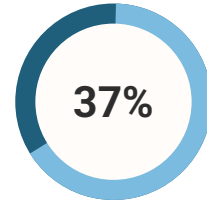
Almost half of the workforce struggles with feeling energized, belonging, and trusting people they work with.

This represents a clear and actionable barrier to work wellbeing.

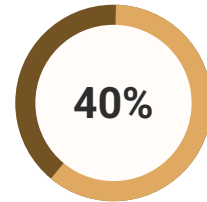
Indeed Work Wellbeing Report, based on a commissioned survey (n=4,038 US adults), conducted by Forrester Consulting, 2025.



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

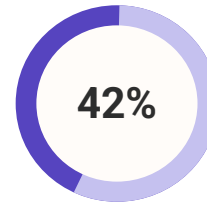
While people view wellbeing as a shared responsibility, organizations are expected to lead.

Everyone plays a role in worker wellbeing:

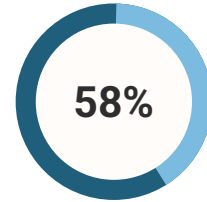
Direct managers are expected to contribute most (20%), then executives (14%), along with HR (11%) and the CEO (10%).

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

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



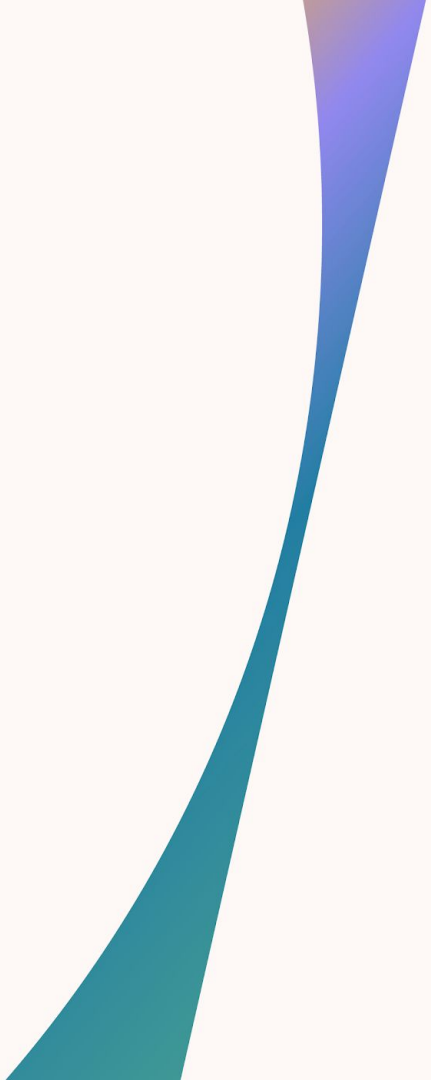
Individuals themselves



Company responsibility

03

Power Performance & AI Adaptability



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

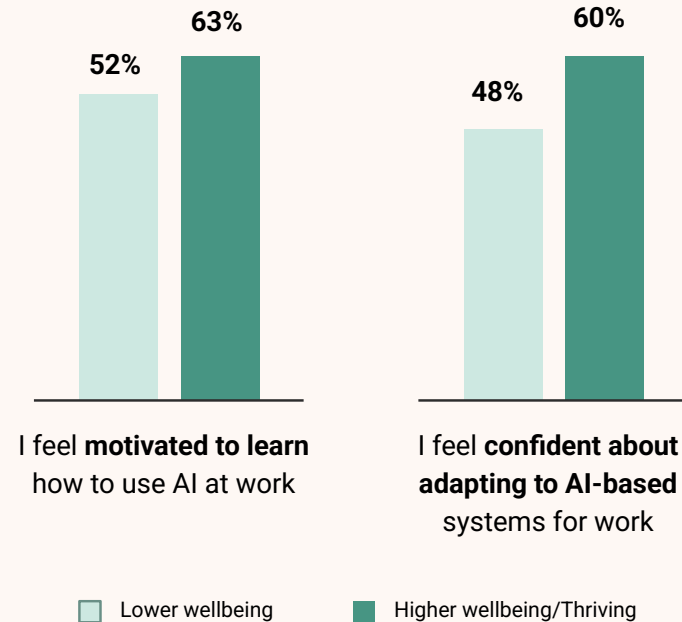
Respondents that indicate a **lower** level of work wellbeing

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%

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%+).



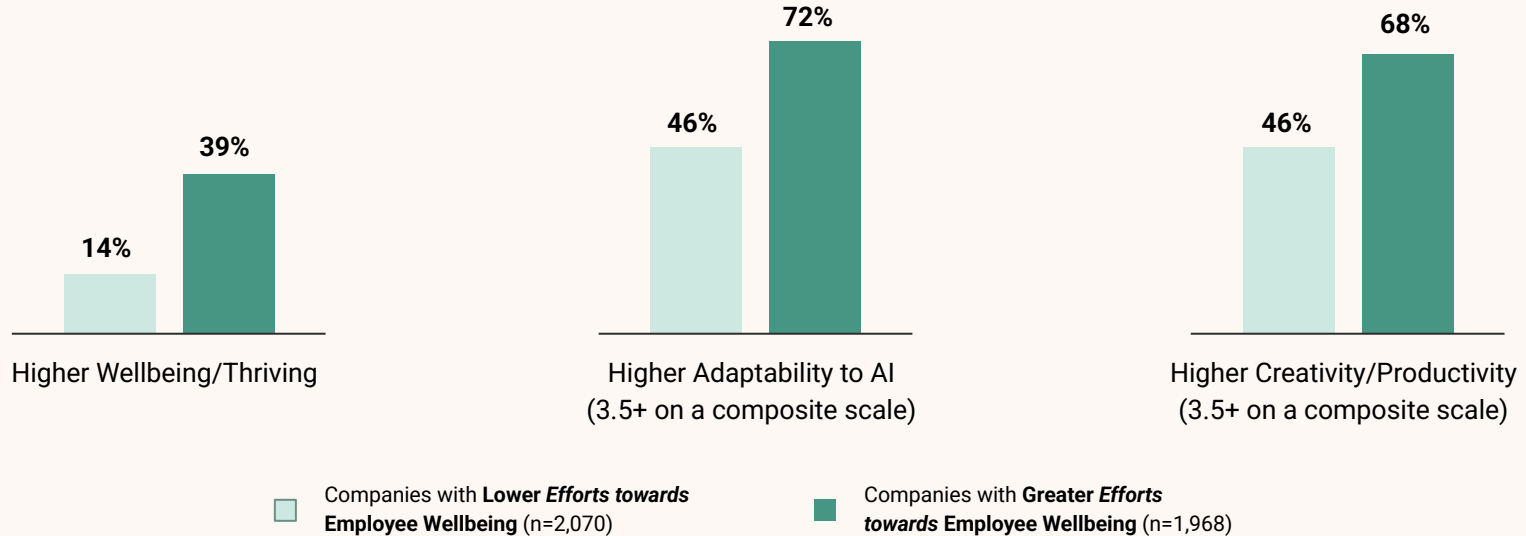
Higher wellbeing = agreement on all wellbeing dimensions: feeling happy at work, being completely satisfied with their job, having a clear sense of purpose in their position, and not feeling stressed most of the time (4-5 ratings on happiness, satisfaction, purpose and NOT stressed). Base: Total respondents: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

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.



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

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

vs.

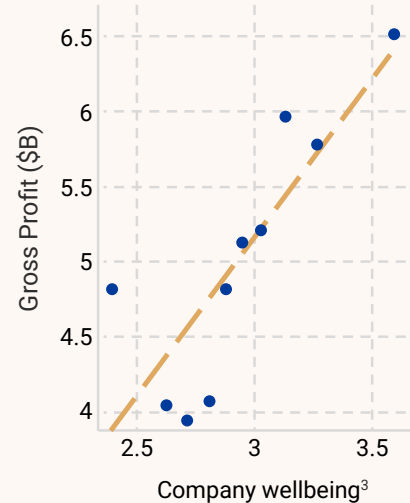
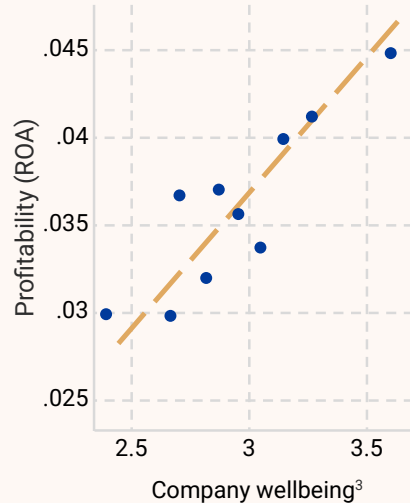
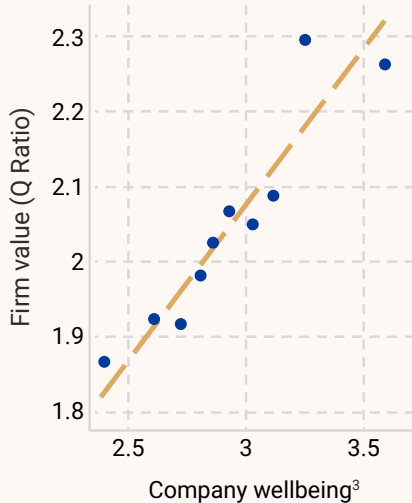
Respondents that indicate a **higher level** of work wellbeing

40%	Are actively searching for a job	20%
50%	Plan to stay at current job for next 12 months	81%

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.

³Composite metric of happiness, satisfaction, purpose, and stress
Source: [Workplace Wellbeing and Firm Performance](#); University of Oxford, July 2024.

The Broader Business Case

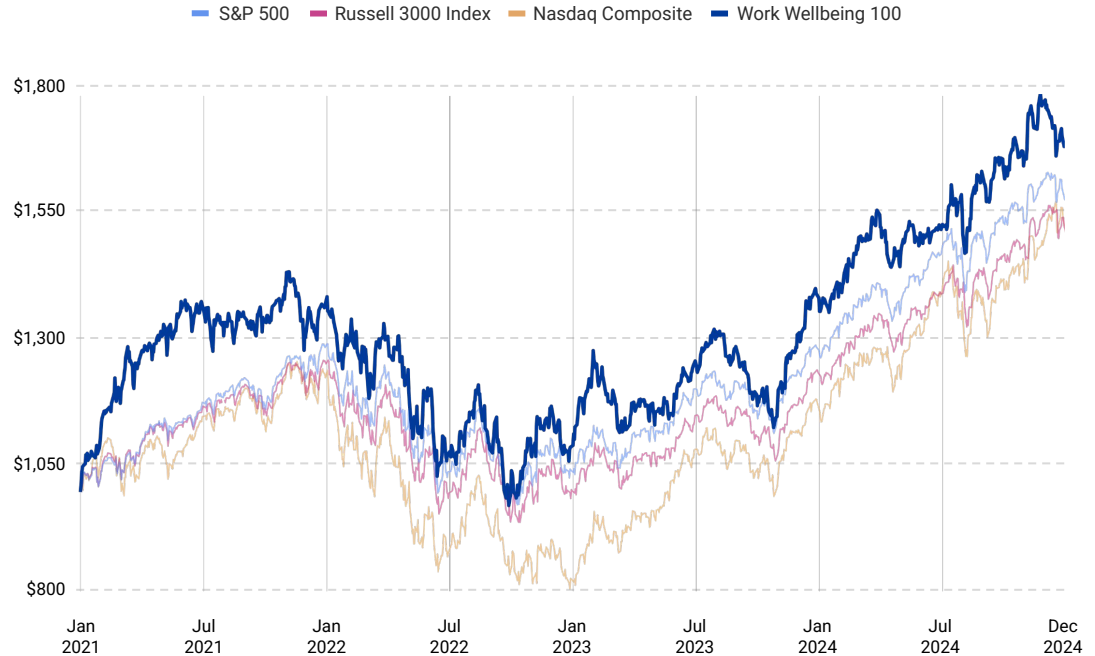
Companies with higher levels of employee wellbeing outperform the stock market

Oxford simulated a portfolio of the public companies on Indeed with the top 100 Work Wellbeing Scores with at least 100 employee surveys in the last year.

This portfolio was compared to major benchmarks like the S&P 500, Russell 3000, and Nasdaq Composite. Results showed these companies consistently outperformed the indices.

Put another way: While the 2025 Work Wellbeing 100 isn't an investable index, if you invested in the Work Wellbeing 100 companies in January 2021, the value of the investment would be 8% greater than the S&P 500 by December 31, 2024.⁴

Work Wellbeing 100 and Stock Performance

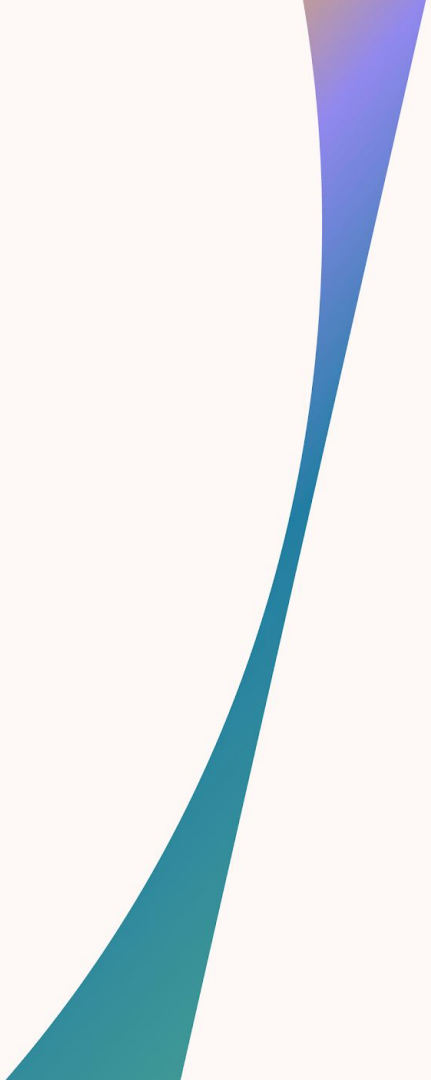


⁴A \$1,000 investment in the Work Wellbeing 100 companies in January 2021 would have grown to \$1,713 by January 2025 compared with \$1,589 had they invested instead in the S&P 500. Note: The Work Wellbeing 100 is not an investable index.

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

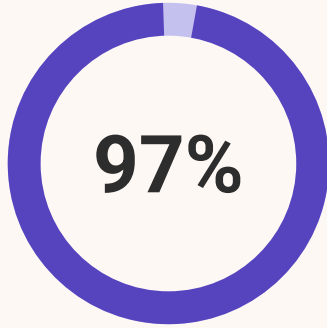
04

Work Wellbeing Attracts Talent



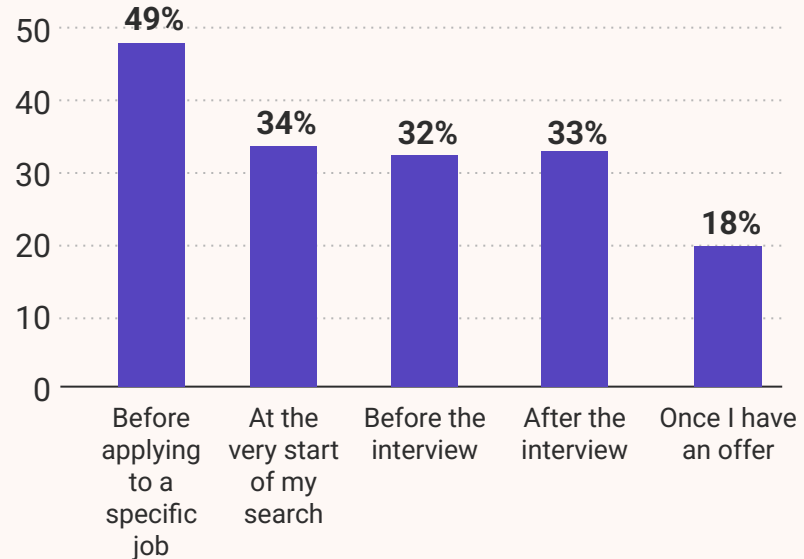
Talent Attraction: Wellbeing in the Search

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.

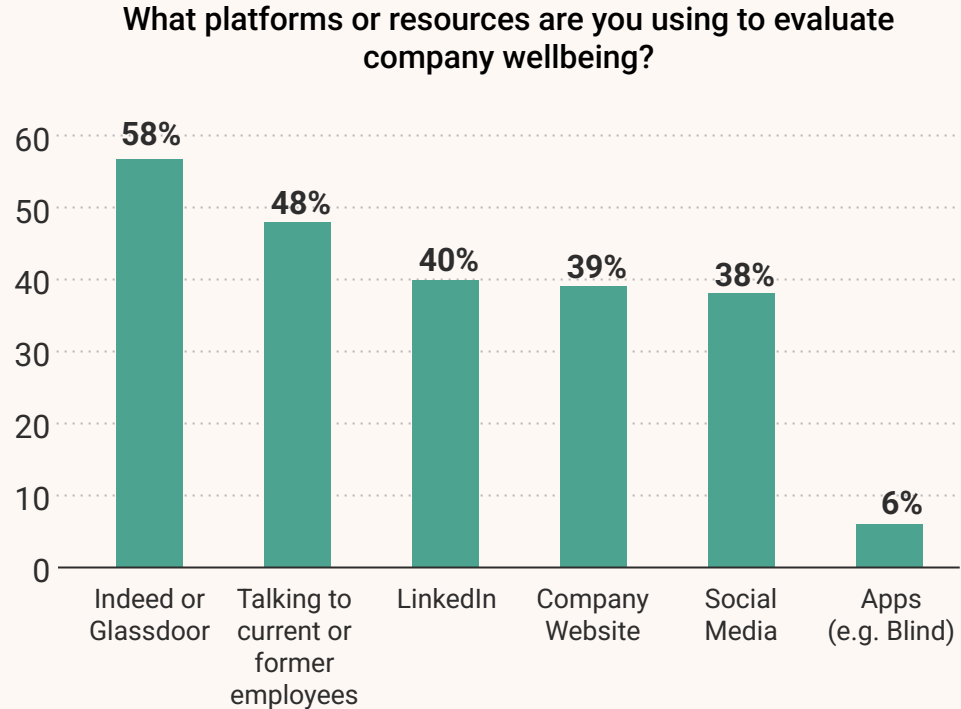


Want to see wellbeing data
in their job search

When is work wellbeing data most helpful?

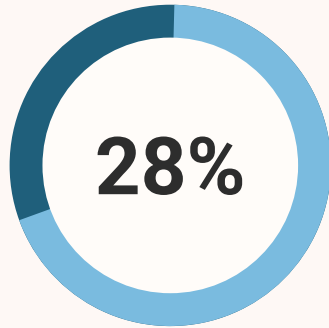


Candidates are evaluating your company's work wellbeing culture using a variety of sources.



Talent Attraction: Interviews

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.



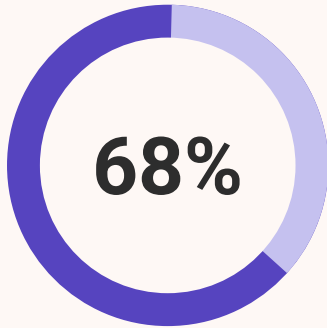
Only 28% of people report they always or often ask the interviewer about work wellbeing

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



Talent Attraction: Evaluating Work Wellbeing

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

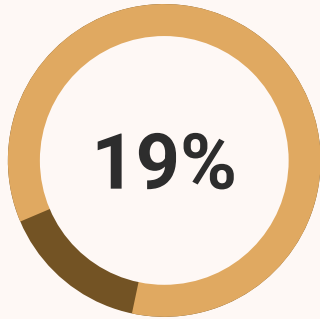


68% of people absolutely believe companies have a responsibility to create environments where people can thrive

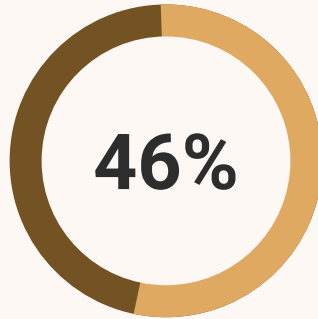
What would make you believe a company is truly prioritizing work wellbeing?



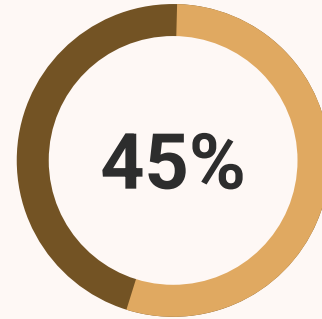
While there is a strong skepticism that companies care actually about work wellbeing, almost half of people report their company is taking some form of action.



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

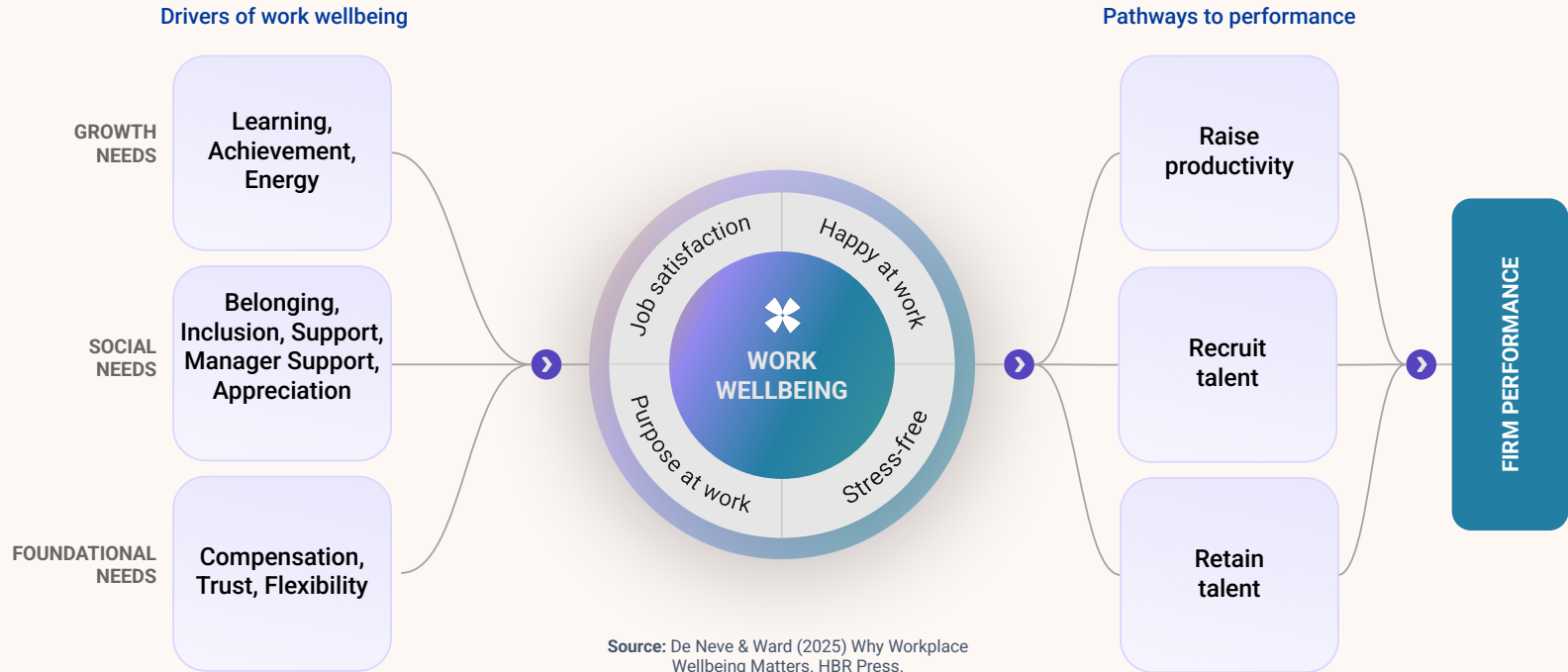
05

Summary & Taking Action



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 wellbeing⁵

- 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

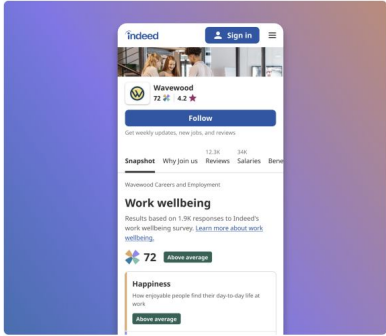
⁵2025 Indeed.com Data, Based on number of survey responses globally

The screenshot displays the Indeed Work Wellbeing Score for Wavewood. The page header includes navigation links for 'Find jobs', 'Company reviews', and 'Find salaries', along with options to 'Upload your resume', 'Sign in', and 'Employers / Post Job'. The Wavewood profile shows a score of 72 (4.2 stars) and a 'Follow' button. Below this, a 'Snapshot' section lists various metrics: 12.3K Reviews, 34K Salaries, Benefits, 1,234 Photos, 170.3K Jobs, 8.9K Q&A, and Interviews. The 'Work wellbeing' section states that results are based on 1.9K responses to Indeed's work wellbeing survey, with a link to 'Learn more about work wellbeing'. A score of 72 is shown as 'Above average'. Two specific metrics are highlighted: 'Happiness' (How enjoyable people find their day-to-day life at work) is 'Above average', and 'Purpose' (How meaningful people find their work) is 'Below average'. Other metrics shown include 'Satisfaction' (How content people feel with their work) and 'Stress-free' (How manageable people find their work). A 'See all results' link is provided. The 'About the company' section features a photo of the CEO. A survey overlay is visible in the bottom right corner, asking for the company name (Wavewood) and displaying a 5-point scale for the statement 'My work has a clear sense of purpose.' and 'I feel happy at work most of the time.'.

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 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 wellbeing¹

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](#)



HAPPINESS



PURPOSE



SATISFACTION



STRESS

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



Appendix:

About Indeed and Methodology

A short, horizontal line with a gradient from orange to blue.

About Indeed

Indeed is the No. 1 job site in the world⁶ with over 615M Job Seeker Profiles⁷ 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.

Source: ⁶Comscore, Total Visits, March 2025

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

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**

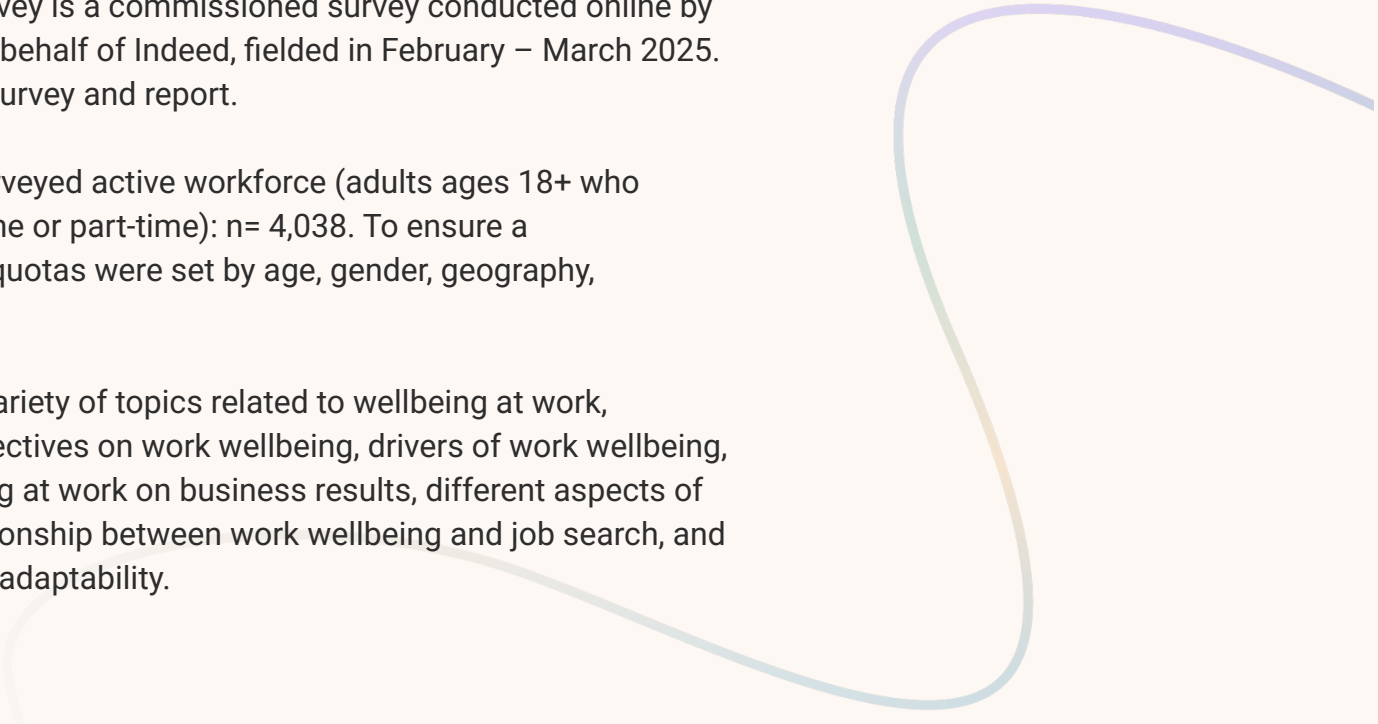
January 2022 - March 2025

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

2025 Demographics

	US	Canada	UK	France	Germany	Netherlands	Australia
Average Age	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%
Income level:							
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.

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

Companies with higher levels of work wellbeing outperform the stock market. Wellbeing directly correlates with **financial metrics**—from valuation to ROI. Investors and boards should view it as a **material performance driver**, not a soft initiative.

Talent Now Prioritizes Work Wellbeing in Employer Evaluation



Insight

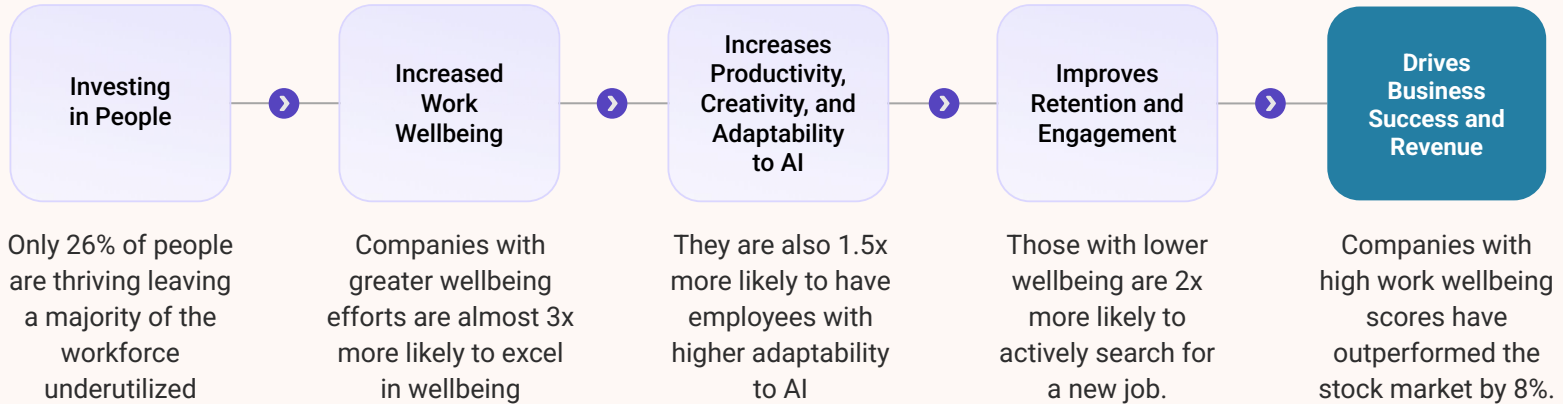
97% of job seekers want to see wellbeing data when evaluating companies—especially *before applying*. Top signals of strong wellbeing include flexible work, high retention, and low burnout.



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.





This document is subject to copyright owned by Indeed, Inc. Any use, alteration, reproduction, retransmissions, republication, in whole or in part, of all or part of the present document without Indeed's written consent is expressly prohibited. Indeed disclaims any liability from the use or application of the information contained herein or from the interpretations thereof. Copyright © 2025 Indeed, Inc. All rights reserved.