



# 2025 Report: How Work Wellbeing Fuels Performance

A Strategic Imperative for Sustained Success



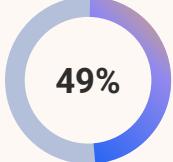
indeed

## Executive Summary

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

Yet only 23% 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 organisations invest in work wellbeing, they unlock higher performance, stronger retention and greater adaptability. Indeed empowers companies to turn work wellbeing into a competitive advantage.



49%

Workers' expectations have evolved, with 49% of people reporting their expectations are higher than just last year; with Gen Z showing an even bigger increase.



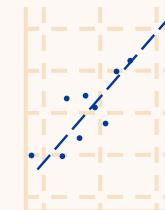
23%

Worker wellbeing remains low. Just 1 in 5 survey respondents are thriving at work.<sup>1</sup>



76%

Wellbeing & adaptability to AI are connected. Employees at companies that prioritise wellbeing are more likely to be adaptable to AI than those that don't (76% vs. 39%).<sup>2</sup>



Wellbeing correlates with financial metrics – from valuation to ROI.



1.5x

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



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

Indeed Work Wellbeing Report, based on a commissioned survey (n=1,551 UK 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

---

1.

[The Rise of Work Wellbeing](#)

2.

[A Wake-Up Call: Only 1 in 5 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=1,551 UK 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 policymakers and statistical agencies across the OECD measure varying dimensions of general wellbeing.'*



**Dr Jan-Emmanuel De Neve**

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



Positive Effect

**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 Effect

**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.'**



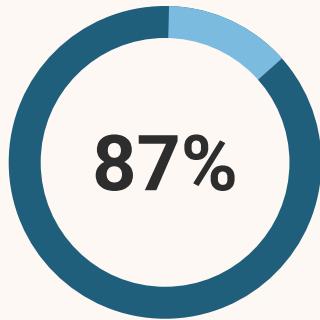
**Kyle M.K.**  
*Indeed Senior Talent Advisor*

01

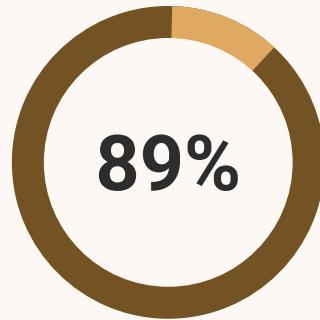
The Rise of Work  
Wellbeing

---

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



Agree that work can provide more than a pay packet



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

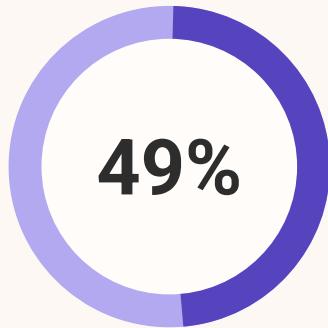


Believe it's possible for people to be happy at work, most of the time

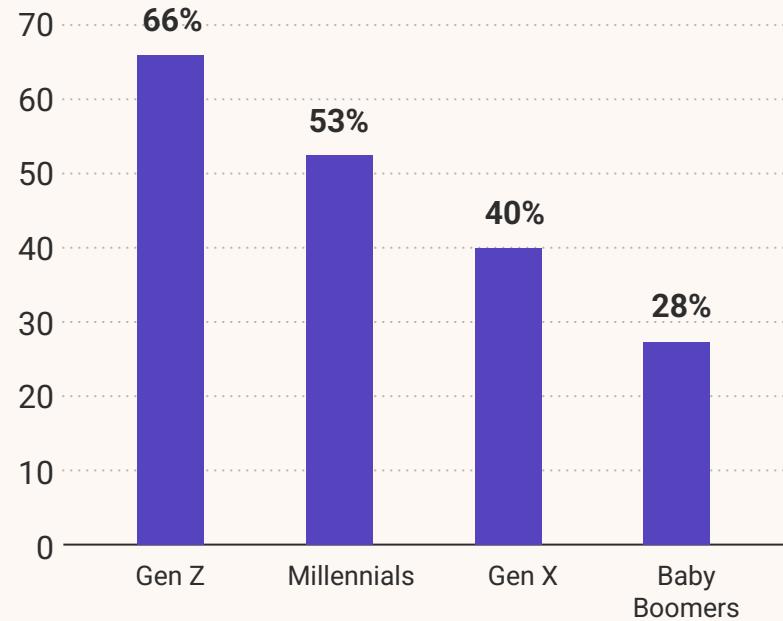
## A Lasting Shift

---

Even in an employer-dominated market, jobseekers' expectations are still rising, signalling 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=1,551 UK adults), conducted by Forrester Consulting, 2025.

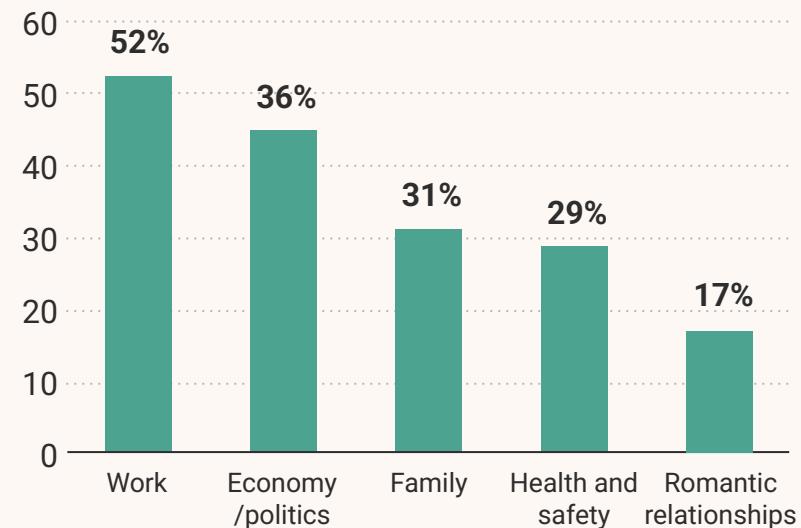
## Work As A Top Stressor

---

**And for good reason.  
Work is still the no. 1  
stressor for people on a  
daily basis, despite  
heightened economic  
and political conditions.**

### Top Life Stressors

*(Select up to 3):*

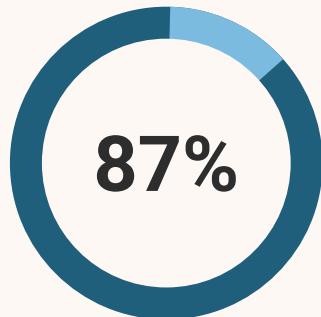


Indeed Work Wellbeing Report, based on a commissioned survey (n=1,551 UK adults),  
conducted by Forrester Consulting, 2025.

## Work-Life Feedback Loop

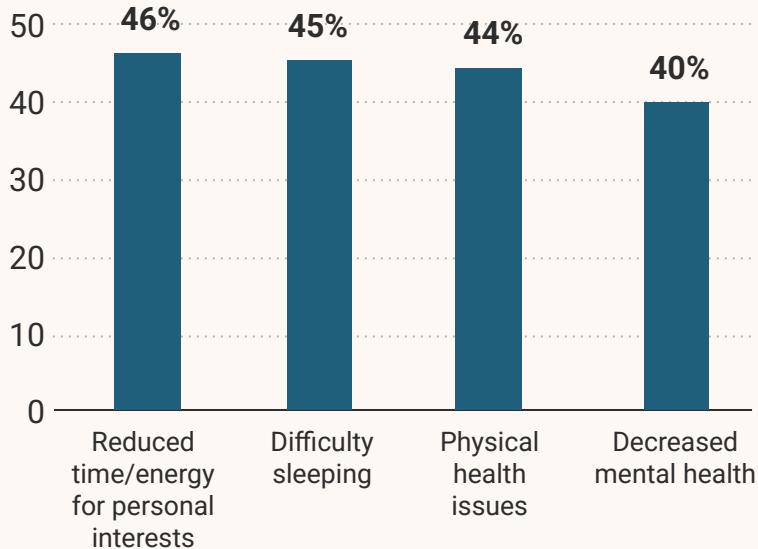
---

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.



Report that their happiness at work affects their mood at home

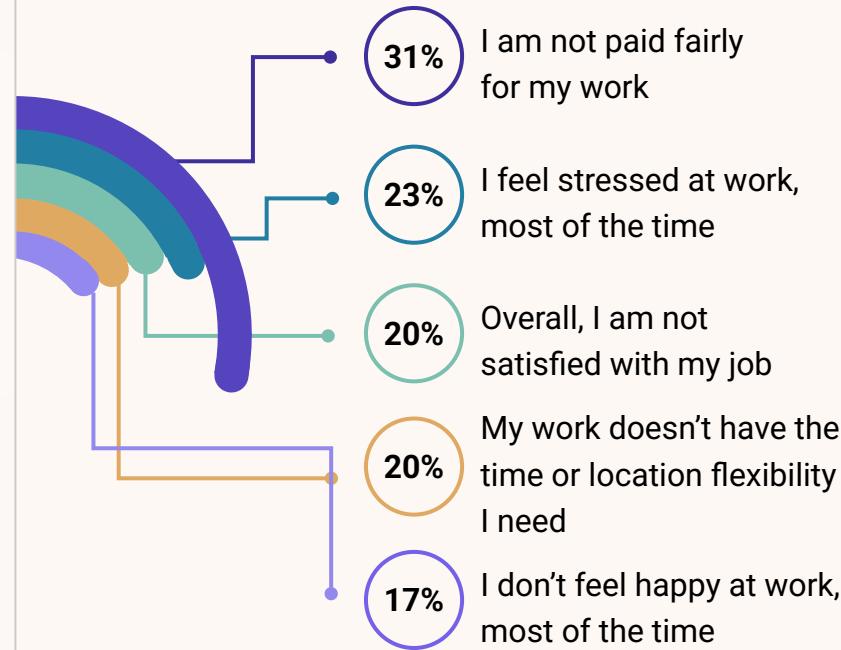
Poor work wellbeing has led to  
(Select all that apply):



## Low Wellbeing Fuels Exits

---

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



Indeed Work Wellbeing Report, based on a commissioned survey (n=1,551 UK adults), conducted by Forrester Consulting, 2025.

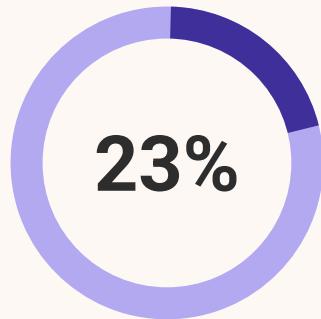
Note: Base for 'Could you please tell us more about the reasons why you would consider new opportunities?' (n=1,305).

## 02

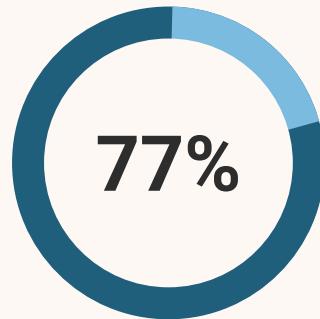
A Wake-Up Call: Only 1 in 5  
are Thriving

---

**Only 23% of people are thriving at work, with many feeling low happiness, high stress, low purpose or low satisfaction.**



Of people are thriving at work



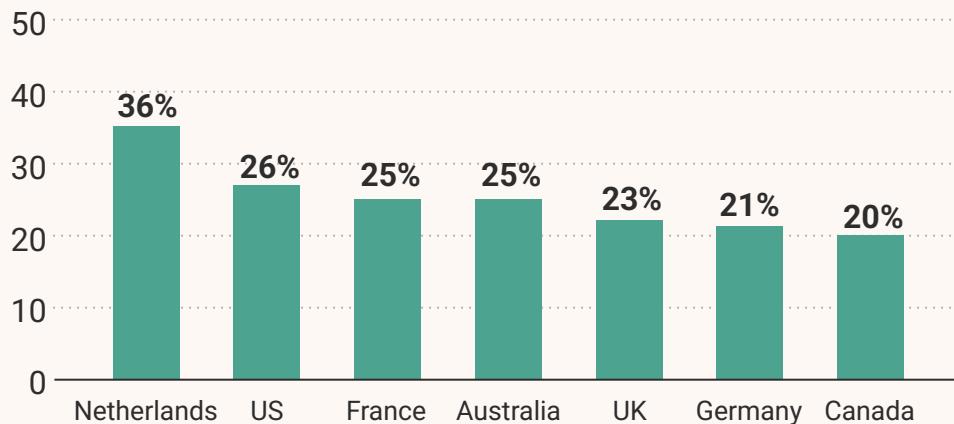
Of people are not thriving at work

Indeed Work Wellbeing Report, based on a commissioned survey (n=1,551 UK adults), conducted by Forrester Consulting, 2025.

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.

**Work wellbeing is low across all countries analysed, with the UK ranking among the lowest.**

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

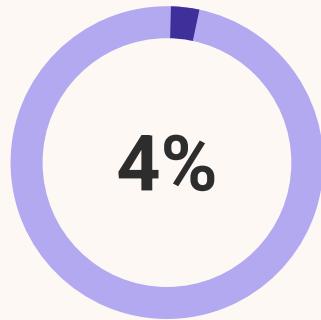
2025: 4,038 US; 1,605 Canada; 1,551 UK; 1,569 France; 1,500 Germany; 1,572 Netherlands; 1,609 Australia

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

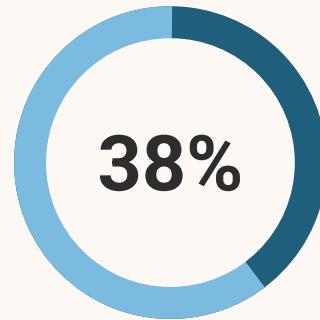
## A Major Stress Gap

---

**Employees with lower work wellbeing are nearly 9 times more likely to regularly experience stress at work.**



Only 4% of people who indicate a **higher level** of work wellbeing are regularly stressed at work



While 38% of people who indicate a **lower level** of work wellbeing are regularly stressed at work

## What actually drives work wellbeing?

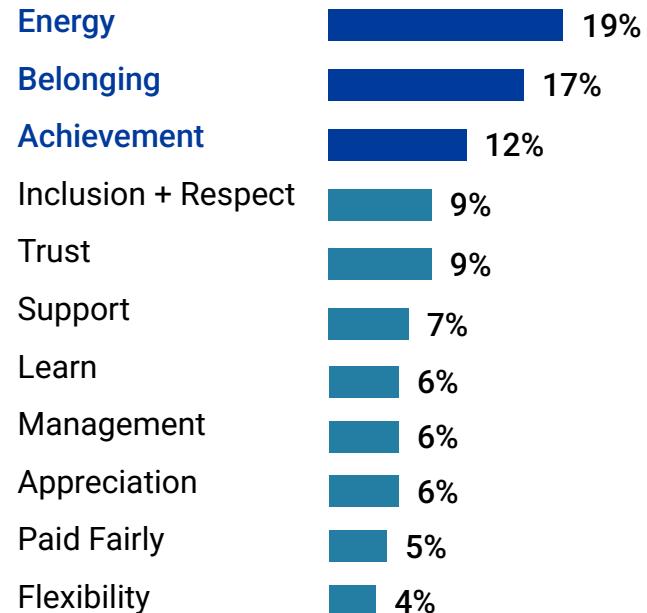
When asked what drives work wellbeing, people often point to 'flexibility' and 'fair pay'.

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

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

1. Being **energised** by your work
2. Feeling like you are **part of something**
3. **Achieving** most of your goals at work

### Driver Analysis Results

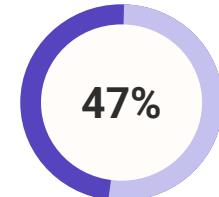


## Barriers to Work Wellbeing

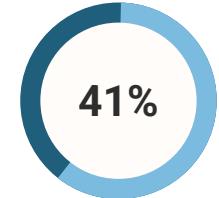
---

**Almost half of workers don't feel energised, feel like they belong, or trust the people they work with.**

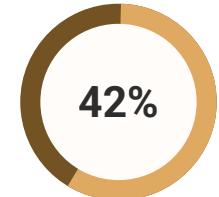
**This represents a clear and actionable barrier to work wellbeing.**



Of workers don't feel energised



Of workers don't feel like they belong



Of workers don't trust people in their company

## A Shared Responsibility

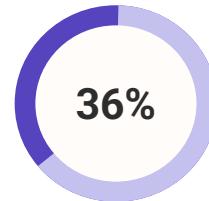
---

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

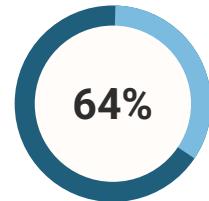
**Everyone plays a role in worker wellbeing:**

Direct managers are expected to contribute most (23%), then executives (15%), along with HR (13%) 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

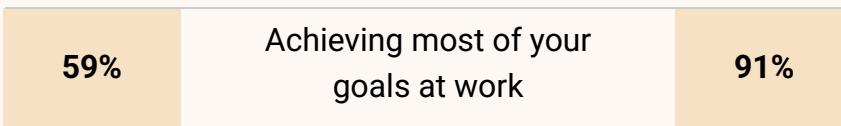
---

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

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

vs

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

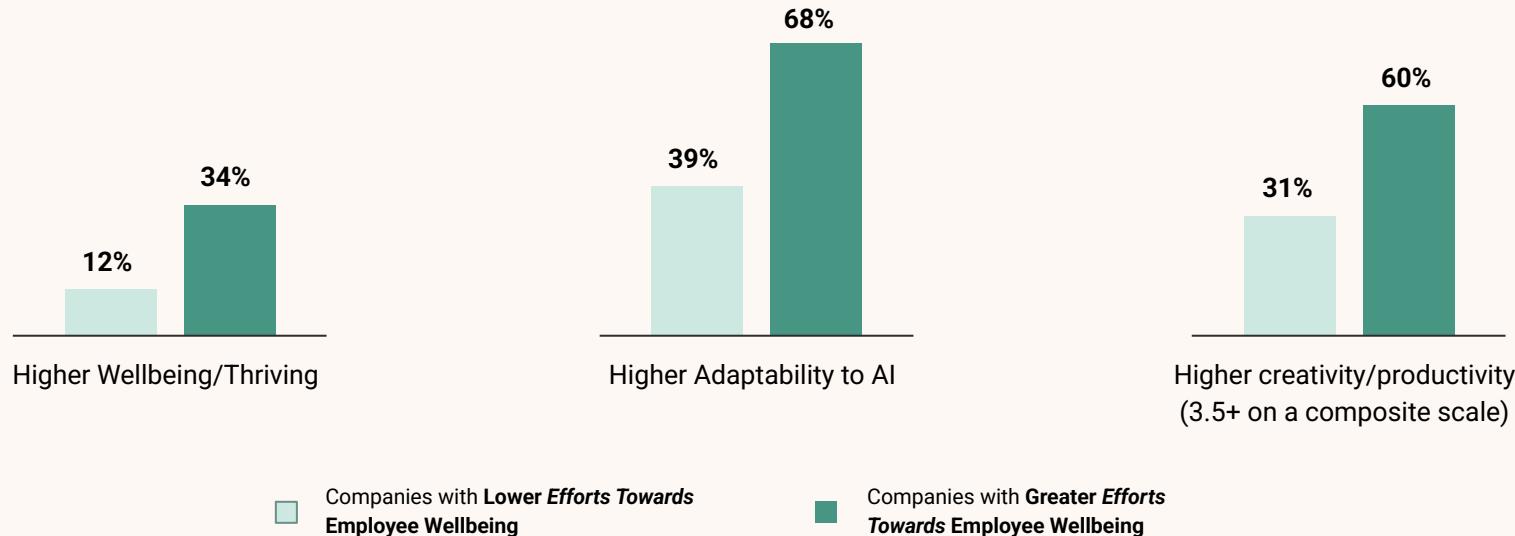


Indeed Work Wellbeing Report, based on a commissioned survey (n=1,551 UK adults),  
conducted by Forrester Consulting, 2025.

Note: Base for 'Lower wellbeing' = 1,194; base for 'Higher wellbeing/Thriving' = 357.

## Productivity: Adaptability & Creativity

**Companies that prioritise and measure employee wellbeing are more likely to excel in wellbeing as well as to score highly on employee adaptability to AI and creativity/productivity.**



Indeed Work Wellbeing Report, based on a commissioned survey (n=1,551 UK adults), conducted by Forrester Consulting, 2025.

Note: Companies with lower efforts towards employee wellbeing (less than 3.5 on a composite scale). Companies with greater efforts towards employee wellbeing (3.5+ on a composite scale).

Note: Base for 'Lower efforts towards wellbeing' = (n=789 Thriving; n=725 Adaptability to AI; n=777 Creativity/Productivity); base for 'Higher efforts towards wellbeing' = (n=762 Thriving; n=736 Adaptability to AI; n=760 Creativity/Productivity).

## Retention: Likelihood to Stay

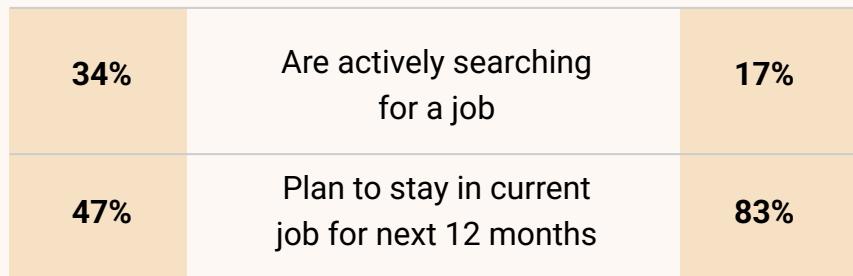
---

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

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

vs

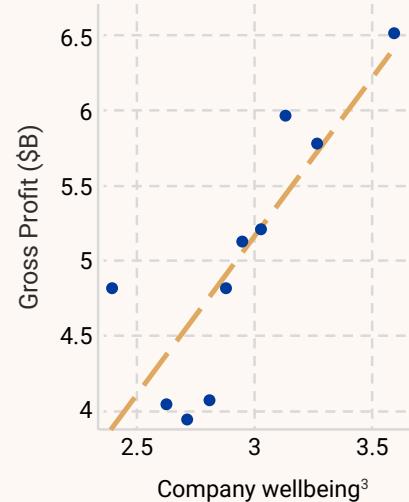
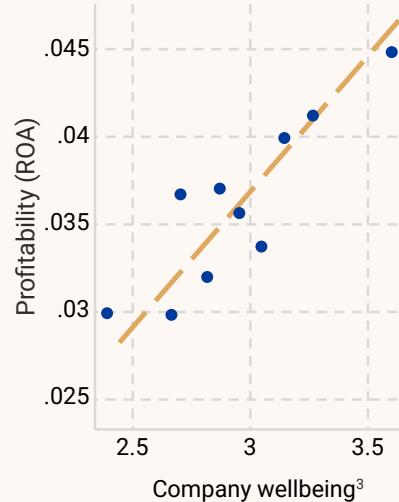
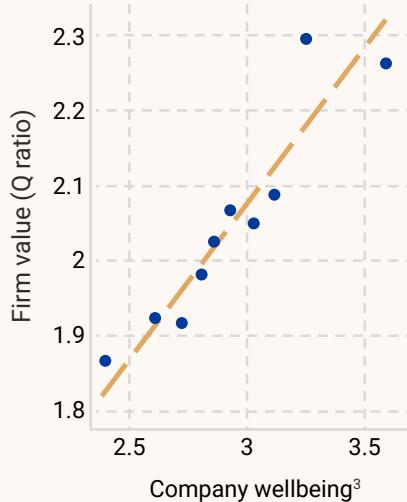
Respondents that  
indicate a **higher** level  
of work wellbeing



## 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 organisations.

<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

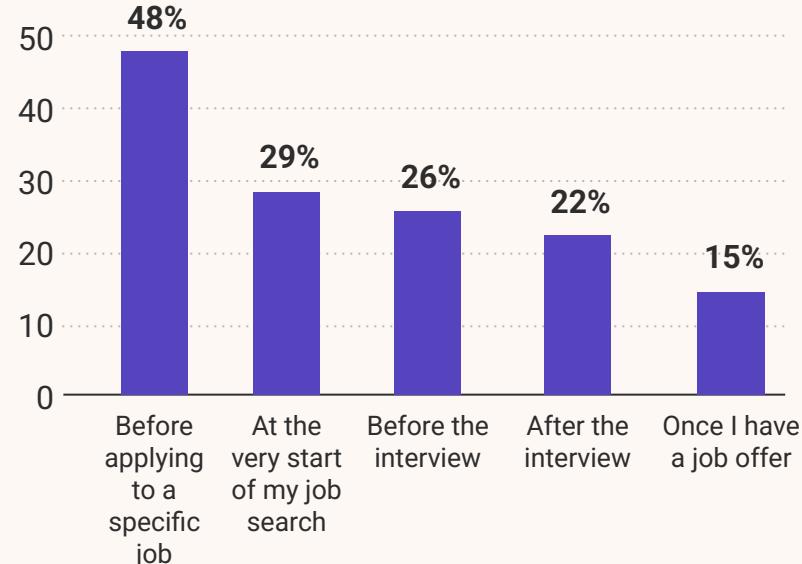
---

## Talent Attraction: Wellbeing in the Search

95% of jobseekers want to see wellbeing data to evaluate companies throughout their job search; it's most critical before they even spend time applying.



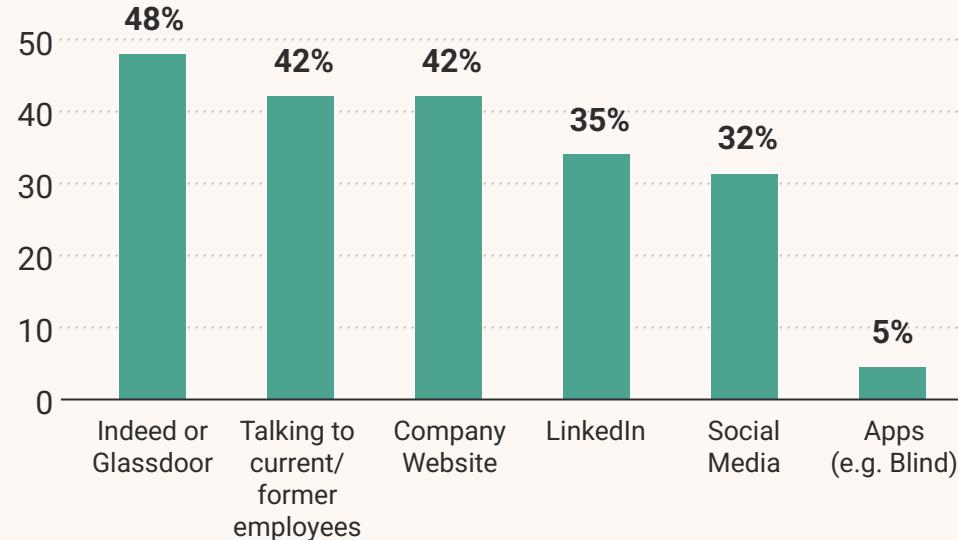
When is work wellbeing data most helpful?



Indeed Work Wellbeing Report, based on a commissioned survey (n=1,551 UK adults), conducted by Forrester Consulting, 2025.

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

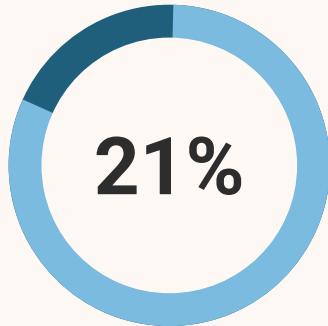
**What platforms or resources are you using to evaluate company wellbeing?**



## Talent Attraction: Interviews

---

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.

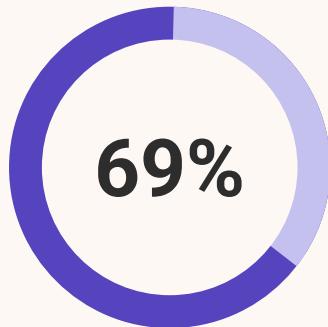


Only 21% of people report that they always or often ask the interviewer about work wellbeing

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 prioritise wellbeing; tangible signs of prioritisation include flexible working, high retention and positive employee feedback**



69% of people believe companies absolutely have a responsibility to create environments where people can thrive

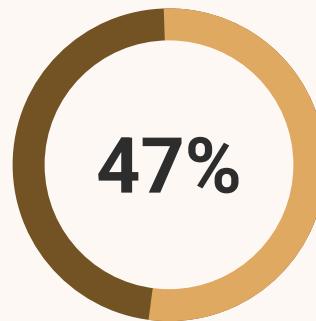
**What would make you believe a company is truly prioritising work wellbeing?**



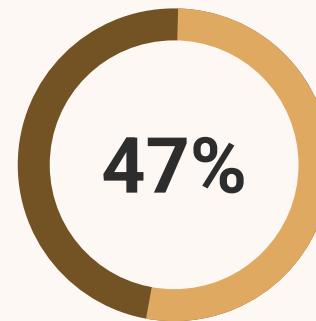
People agree that their wellbeing is tied to the success of their business. However, their companies are not always prioritising it.



My company believes  
employee wellbeing and  
happiness = business success



My company is doing all it can  
to improve employee wellbeing



My company measures  
work wellbeing

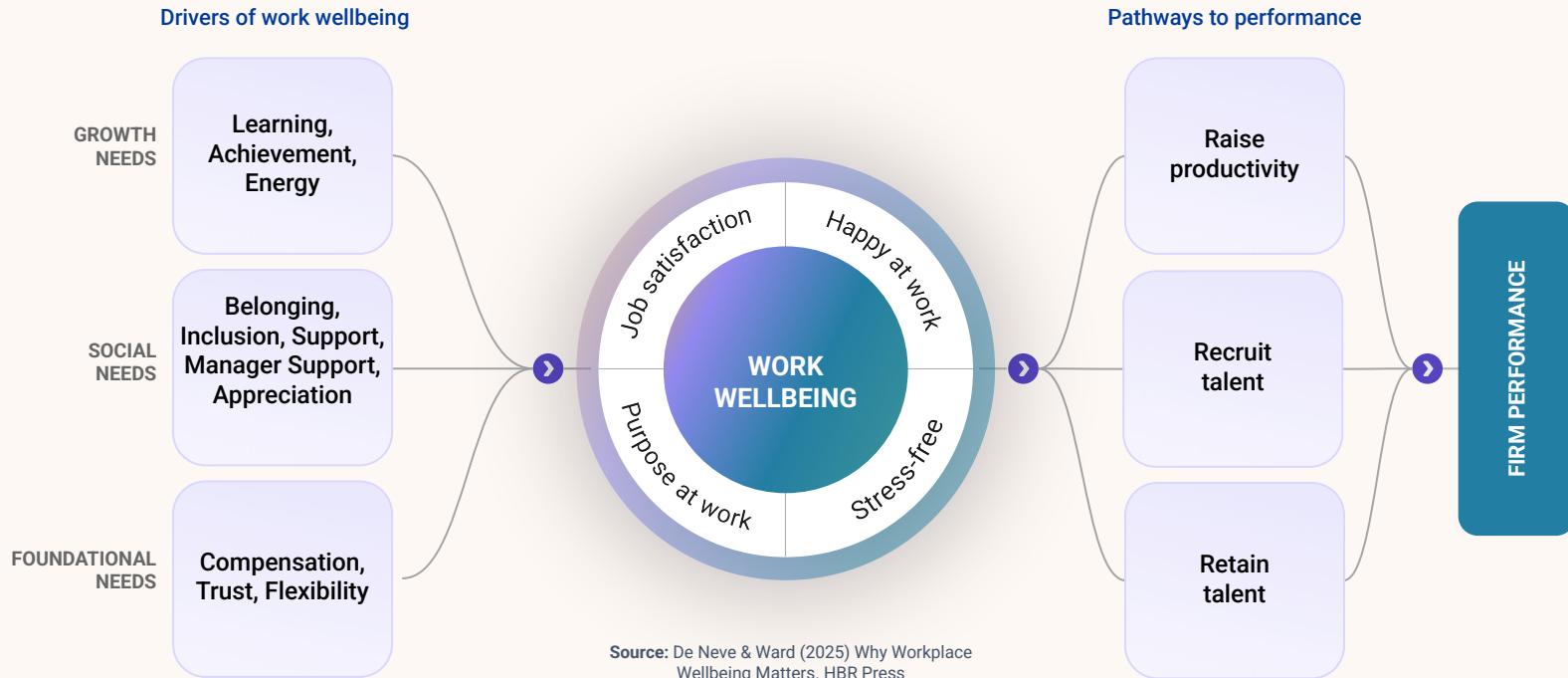
05

# Summary & Taking Action

---

## Summary

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

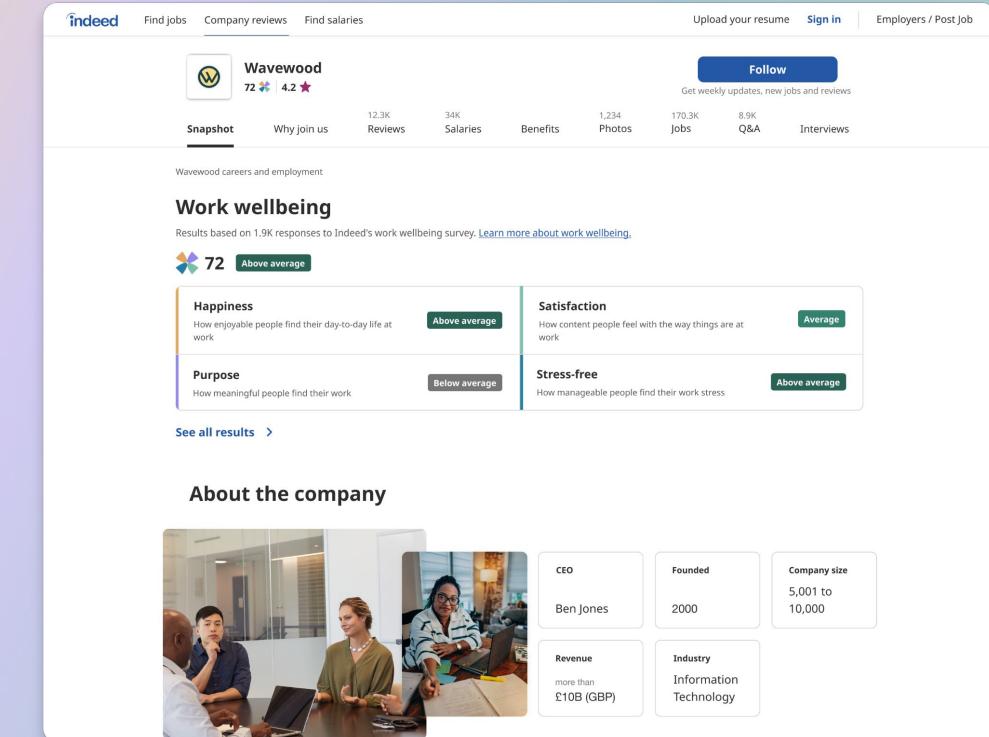


## Indeed Work Wellbeing Score

# 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 285 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 page for the company Wavewood. The top navigation bar includes 'Find jobs', 'Company reviews', 'Find salaries', 'Upload your resume', 'Sign in', and 'Employers / Post Job'. The company profile for Wavewood shows a logo, 72 reviews (above average), and a 4.2 star rating. Key metrics listed are 12.3K reviews, 34K salaries, 1,234 photos, 170.3K jobs, 8.9K Q&A, and 11 interviews. A 'Follow' button is available. Below the profile, a section titled 'Work wellbeing' displays results from 1.9K responses. It includes a chart showing a score of 72 (above average) and four categories: Happiness (above average), Satisfaction (average), Purpose (below average), and Stress-free (above average). A 'See all results' link is provided. The 'About the company' section features a photo of four people in a meeting and a table with company details: CEO Ben Jones, Founded 2000, Company size 5,001 to 10,000, Revenue more than £10B (GBP), and Industry Information Technology.

Category	Score	Comparison
Happiness	72	Above average
Satisfaction		Average
Purpose		Below average
Stress-free		Above average

CEO	Ben Jones
Founded	2000
Company size	5,001 to 10,000
Revenue	more than £10B (GBP)
Industry	Information Technology

## 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

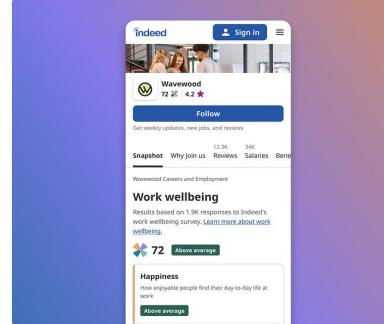
### Indeed Work Wellbeing Score

## 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.**



# Appendix:

## About Indeed and methodology

---

## About Indeed

---

Indeed is the no. 1 job site in the world<sup>6</sup> with over 615 million jobseeker profiles<sup>7</sup>. Indeed strives to put jobseekers first while providing quality matches for employers fast to support their recruitment needs.

Every day, we connect millions of people to work better to create better lives, combining the latest in AI technology and the power of human judgement and connection.

**615M**  
Jobseeker  
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

**520K**  
new jobs  
added each  
month in the  
UK

**6.3M**  
Indeed Apply  
applications  
completed  
each day  
on mobile,  
worldwide.

**24.1M**  
phone  
interviews on  
Indeed  
worldwide

January 2022 – March  
2025

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

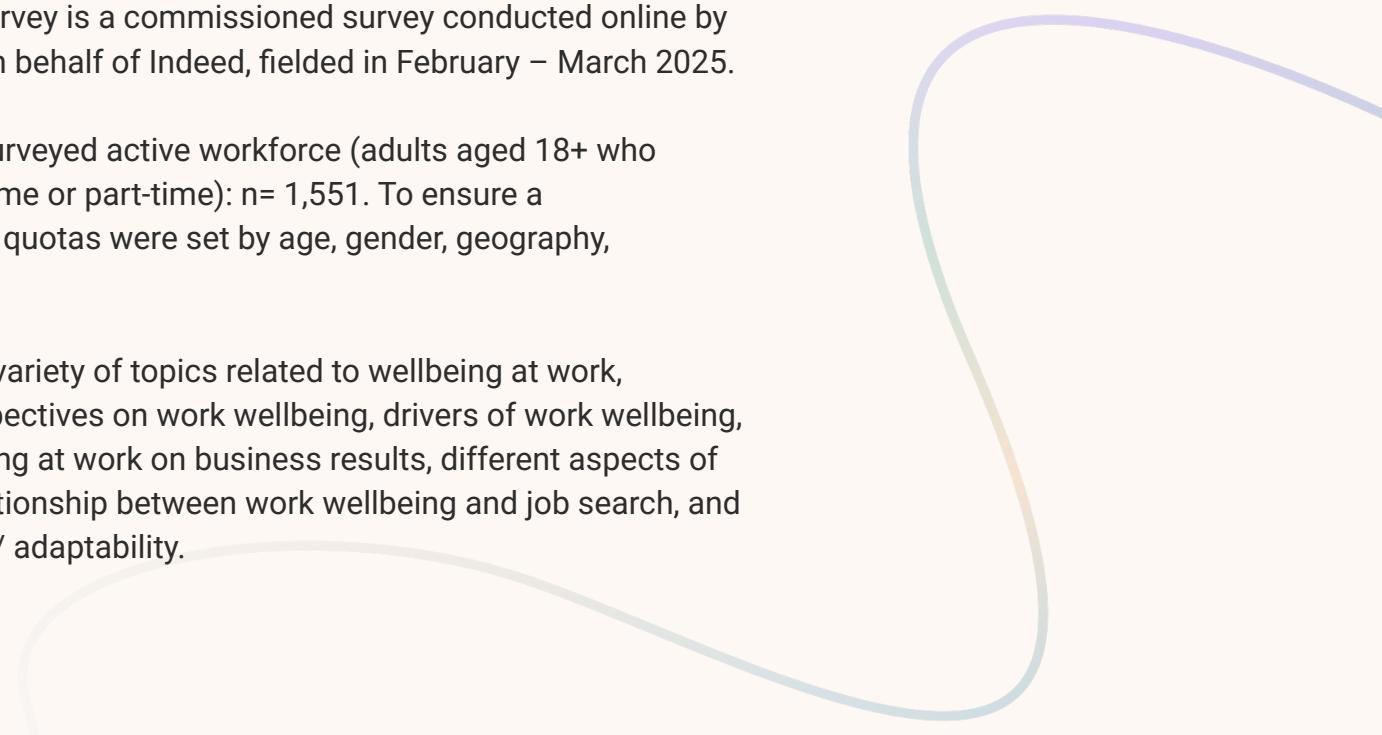
Source: <sup>7</sup>Indeed data (worldwide), job seeker accounts with a unique, verified email address

## Methodology

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

Forrester Consulting surveyed active workforce (adults aged 18+ who reported working full-time or part-time): n= 1,551. 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
<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 (fewer than 35 hours per week)	22%	18%	32%	20%	30%	44%	28%
Live in urban location (large/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

---

# Only 23% of Employees Are Thriving at Work



## Insight

The vast majority (77%) of the workforce is not thriving – reporting low happiness, high stress, low satisfaction or lack of purpose.



## Implication

Most companies are operating with under-optimised 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 energised by work)
- Belonging (feeling part of something)
- Achieving most of your goals at work



### 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 Overall Productivity



## Insight

Companies that prioritise and measure wellbeing are significantly more likely to have employees who adapt to AI and excel in creativity and productivity.



## Implication

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

## Work Wellbeing Boosts Performance and Retention



### Insight

People with high work wellbeing:

- Achieve goals 1.5 times 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

---

# Talent Now Prioritises Work Wellbeing in Employer Evaluation



## Insight

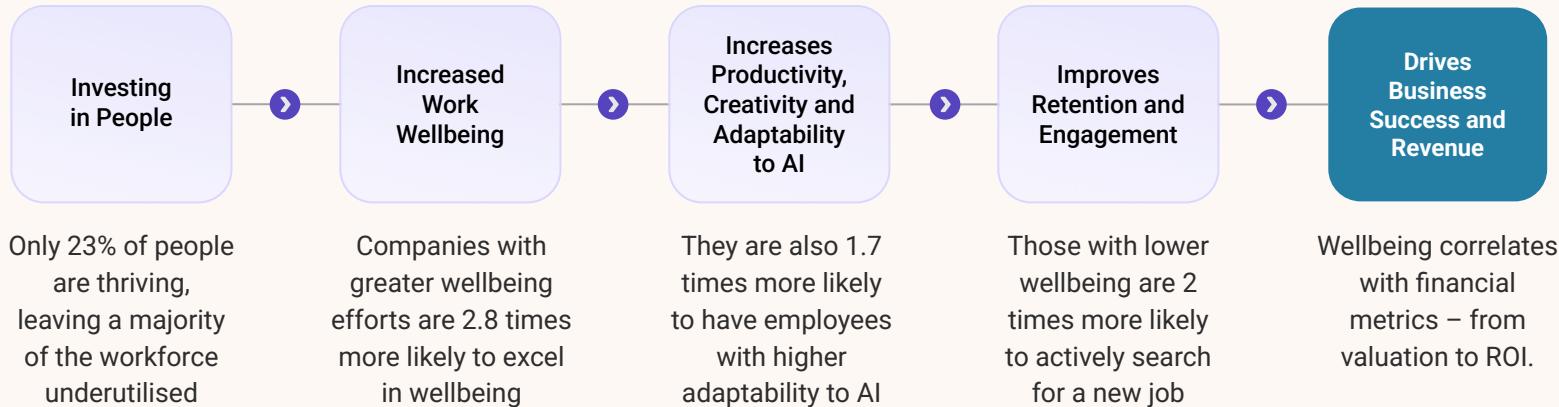
95% of jobseekers want to see wellbeing data when evaluating companies – especially *before applying*. Top signals of strong wellbeing include flexible work, high retention and positive feedback from employees.



## 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, retransmission or 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.