



2025 Report: How Work Wellbeing Fuels Performance

A Strategic Imperative for Sustained Success

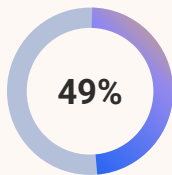


Executive Summary

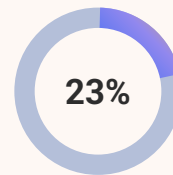
Today's talent is looking for more than just a pay packet. They want purpose, support and the opportunity to thrive.

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.

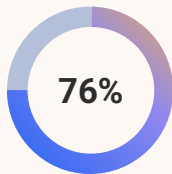
But the inverse is also true: when organisations invest in work wellbeing, they unlock higher performance, stronger retention and greater adaptability. Indeed empowers companies to turn work wellbeing into a competitive advantage.



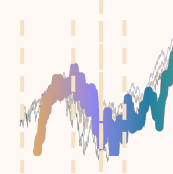
Workers' expectations have evolved, with 49% of people reporting their expectations are higher than just last year; with Gen Z showing an even bigger increase.



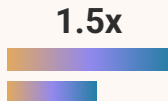
Worker wellbeing remains low. Just 1 in 5 survey respondents are thriving at work.¹



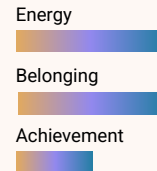
Wellbeing & adaptability to AI are connected. Employees at companies that prioritise wellbeing are more likely to be adaptable to AI than those that don't (76% vs. 39%).²



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 1.5 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.

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
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.'

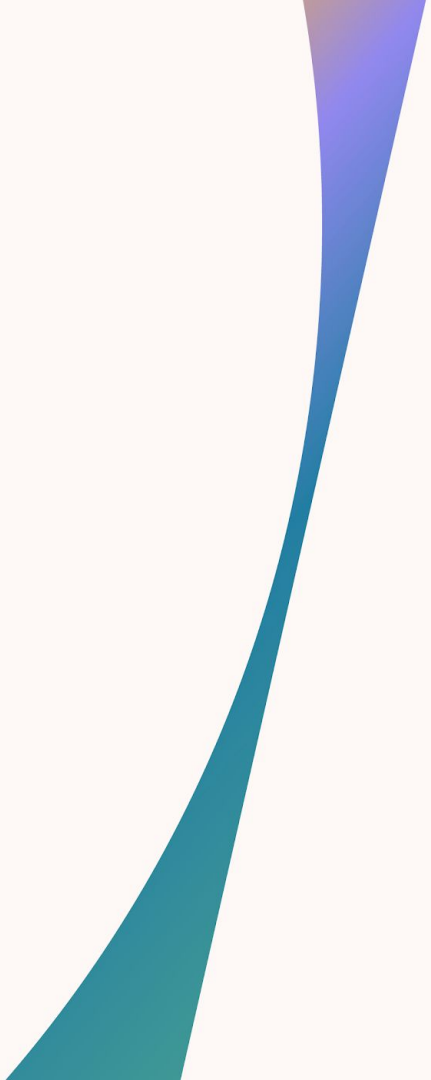


Kyle M.K.

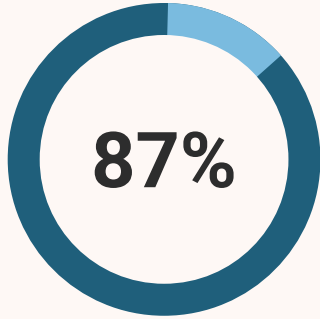
Indeed Senior Talent Advisor

01

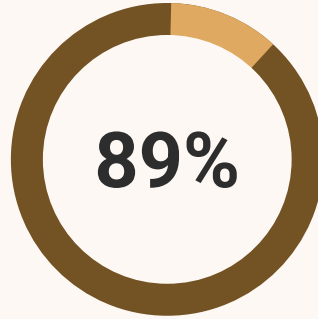
The Rise of Work Wellbeing

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

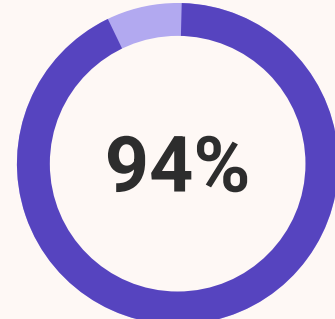
Today's talent craves more than just a pay packet; they're driven by an optimism that happiness at work is possible for them.



Agree that work can provide more than a pay packet



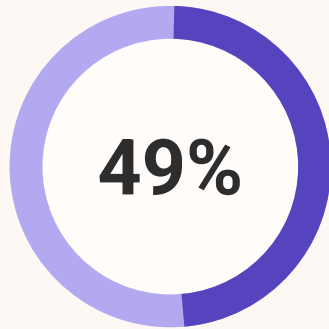
Report it's important to find companies that care about how you feel



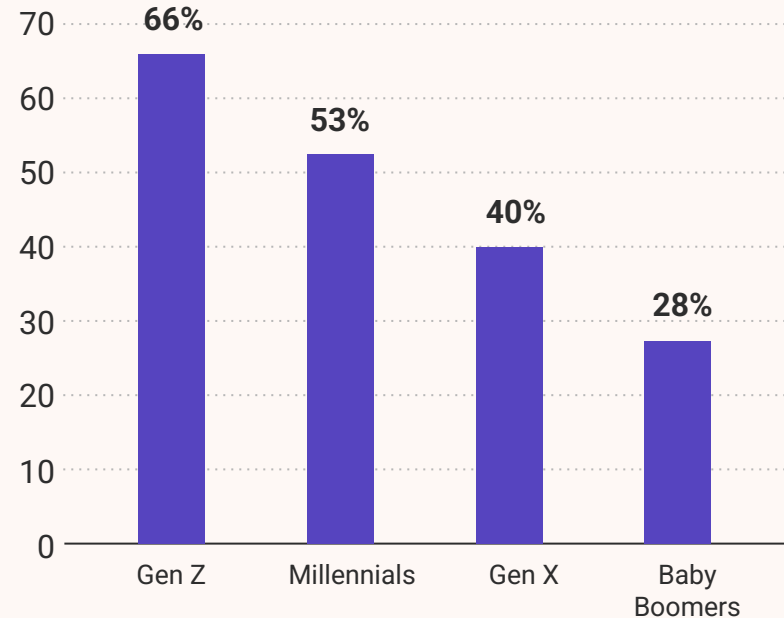
Believe it's possible for people to be happy at work, most of the time

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.



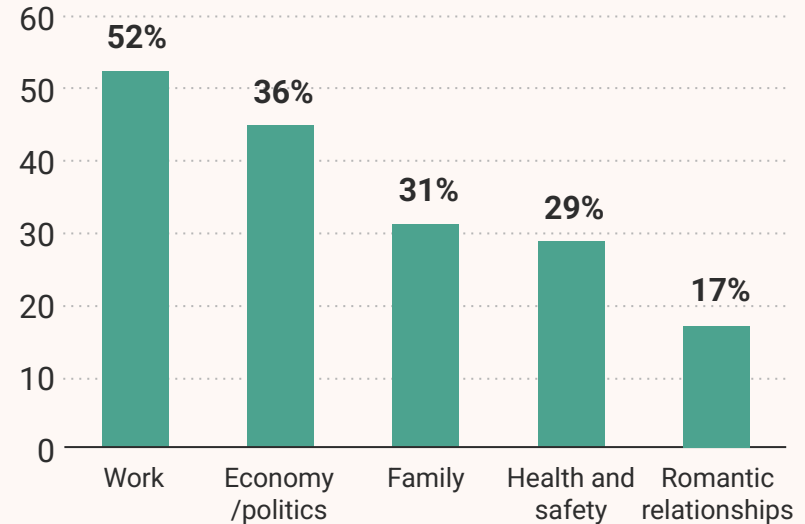
Of people report their work wellbeing expectations are **higher than they were just one year ago**



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

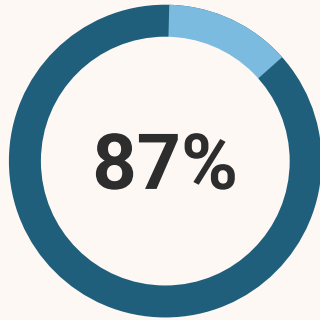
And for good reason.
Work is still the no. 1
stressor for people on a
daily basis, despite
heightened economic
and political conditions.

Top Life Stressors
(Select up to 3):



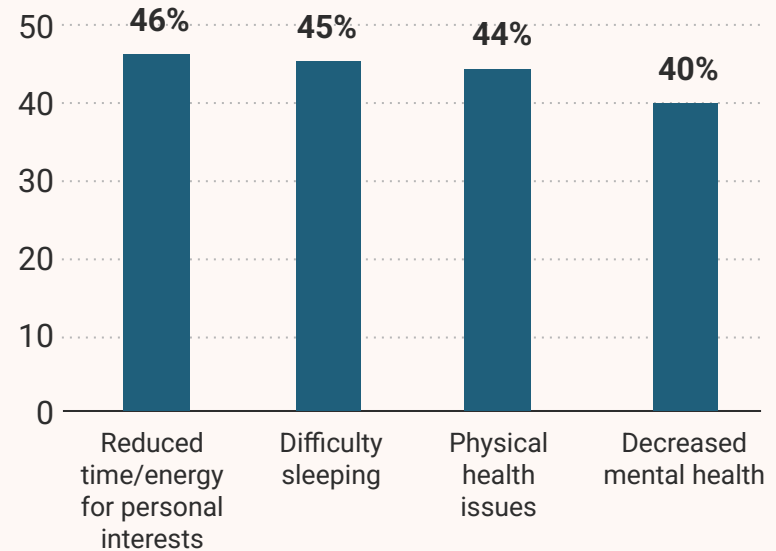
Work-Life Feedback Loop

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.

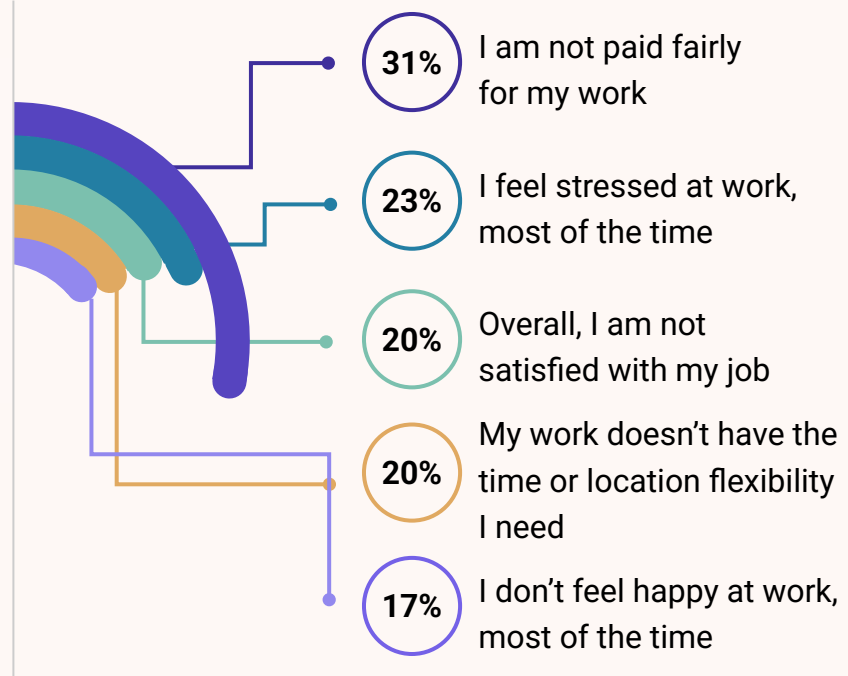


Report that their happiness at work affects their mood at home

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



**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.

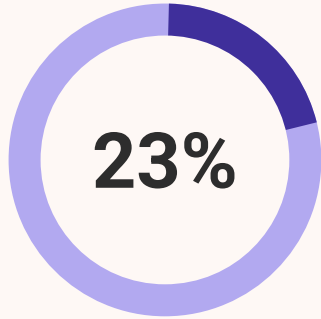
Note: Base for 'Could you please tell us more about the reasons why you would consider new opportunities?' (n=1,305).

02

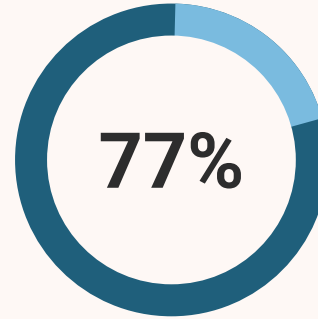
A Wake-Up Call: Only 1 in 5
are Thriving

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

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



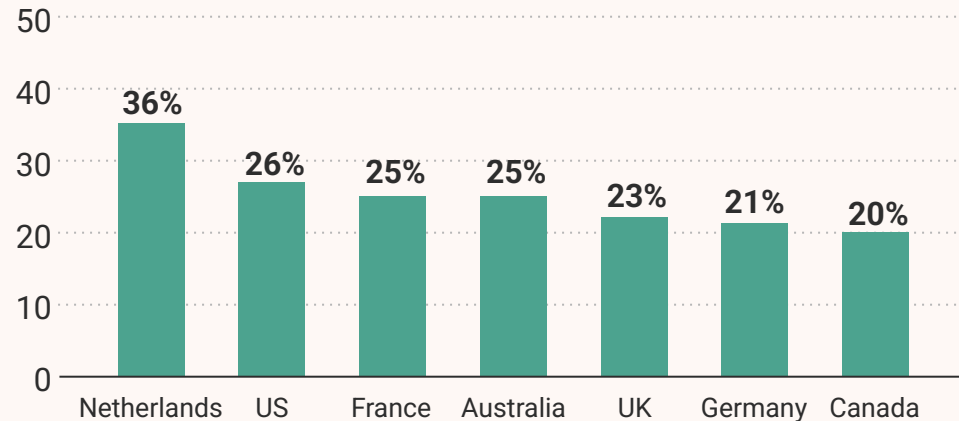
Of people are thriving at work



Of people are not thriving at work

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

Percentage of People Thriving at Work



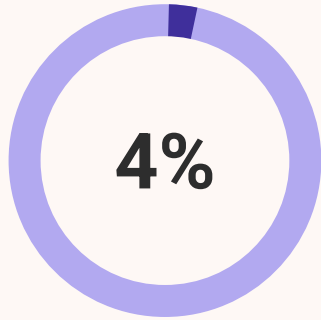
Higher wellbeing/Thriving = agreement on all wellbeing dimensions: feeling happy at work, being completely satisfied with their job, having a clear sense of purpose in their position, and not feeling stressed most of the time (4-5 ratings on happiness, satisfaction, purpose and NOT stressed)

Base: Total respondents

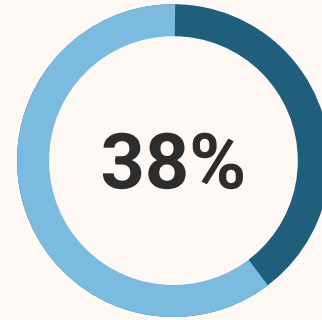
2025: 4,038 US; 1,605 Canada; 1,551 UK; 1,569 France; 1,500 Germany; 1,572 Netherlands; 1,609 Australia

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

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'.

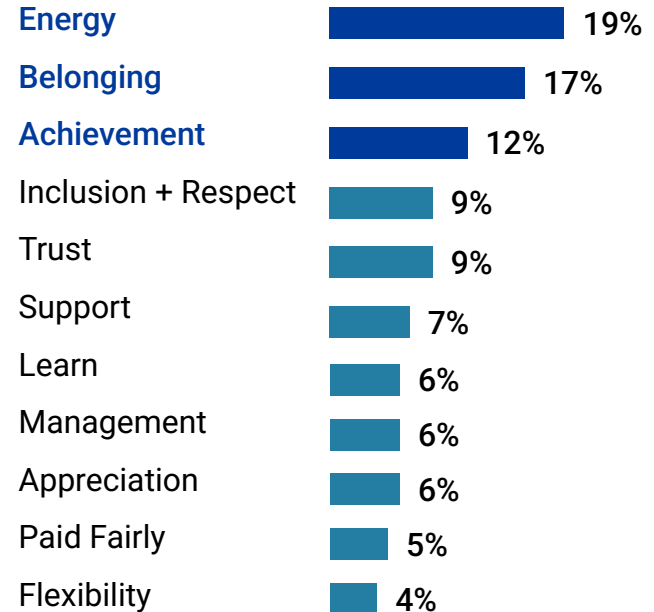
However, when Forrester analyses what drives work wellbeing statistically, a different story emerges.

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

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

Driver Analysis Results

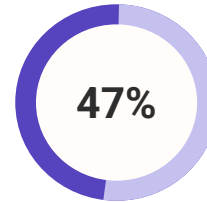


Barriers to Work Wellbeing

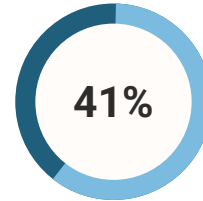
Almost half of workers don't feel energised, feel like they belong, or trust the people they work with.

This represents a clear and actionable barrier to work wellbeing.

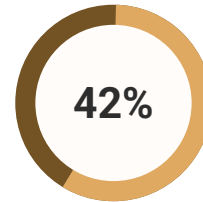
Indeed Work Wellbeing Report, based on a commissioned survey (n=1,551 UK adults), conducted by Forrester Consulting, 2025.



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

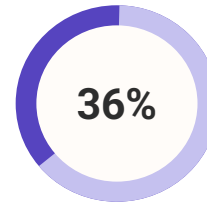
While people view wellbeing as a shared responsibility, organisations are expected to lead.

Everyone plays a role in worker wellbeing:

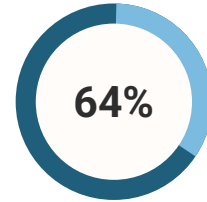
Direct managers are expected to contribute most (23%), then executives (15%), along with HR (13%) and the CEO (10%).

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

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



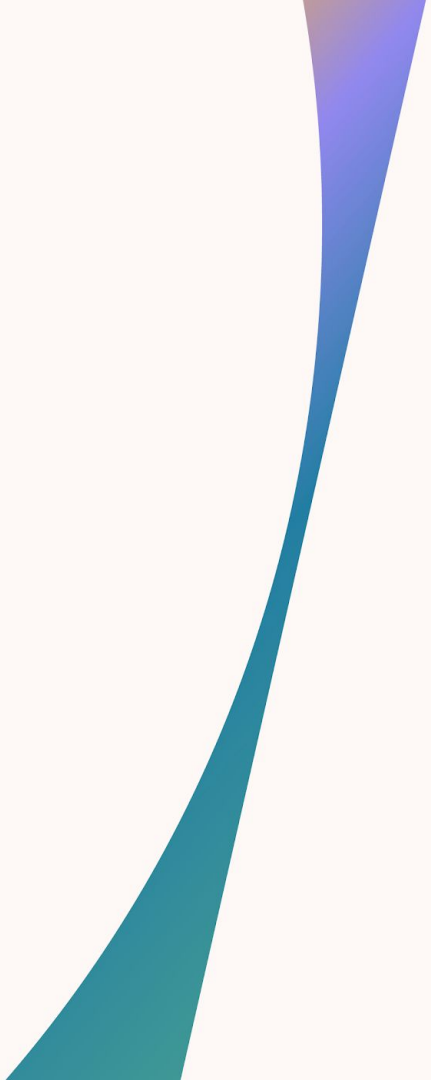
Individuals themselves



Company responsibility

03

Power Performance & AI Adaptability



Employees with high wellbeing achieve goals at work 1.5 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

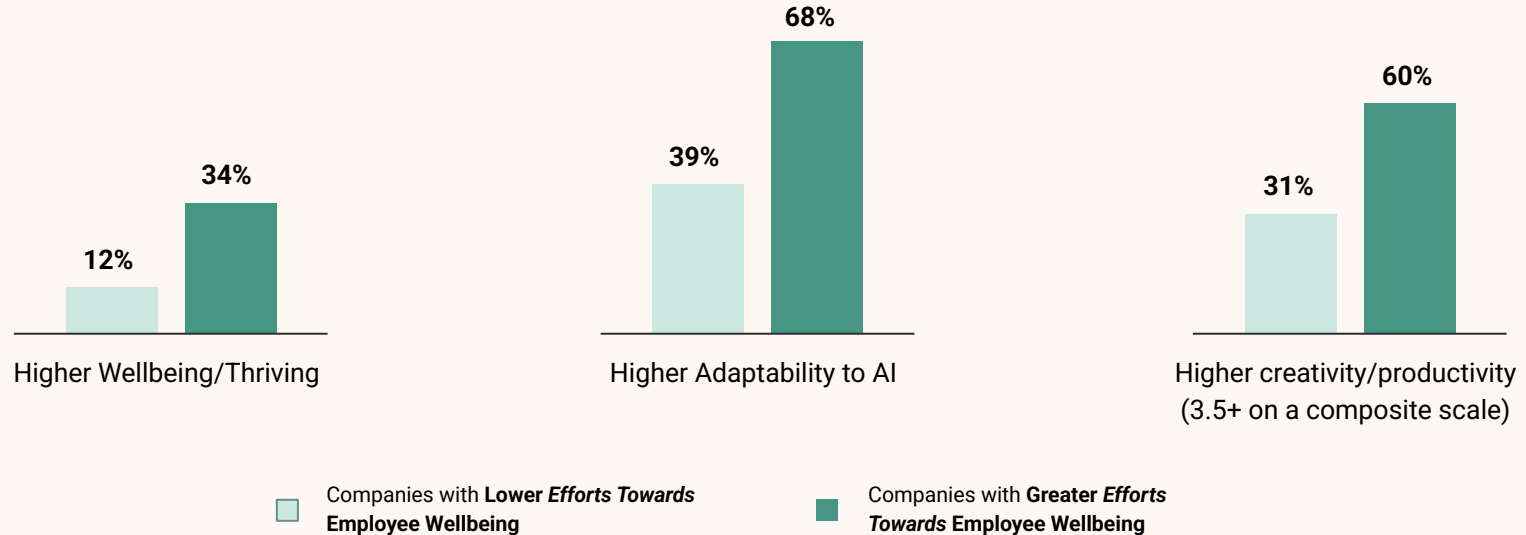
59%

Achieving most of your goals at work

91%

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).

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

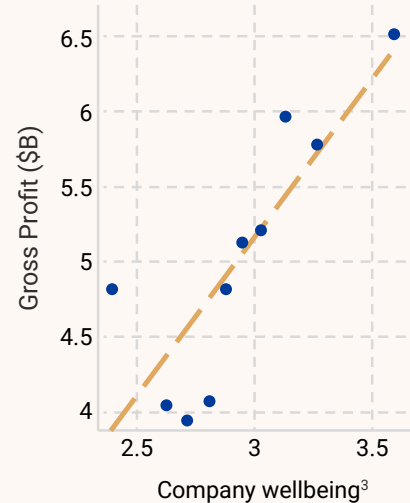
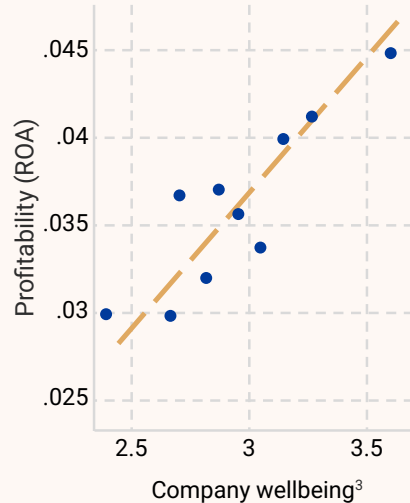
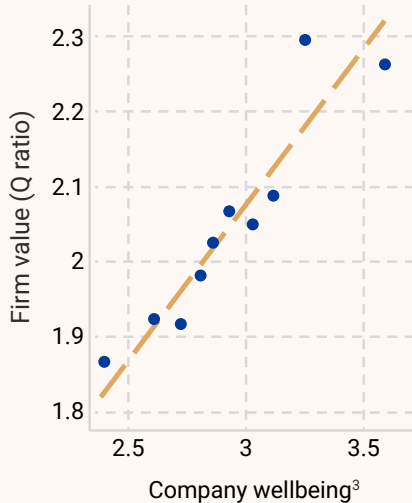
Respondents that indicate a **higher** level of work wellbeing

34%	Are actively searching for a job	17%
47%	Plan to stay in current job for next 12 months	83%

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.

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

The Broader Business Case

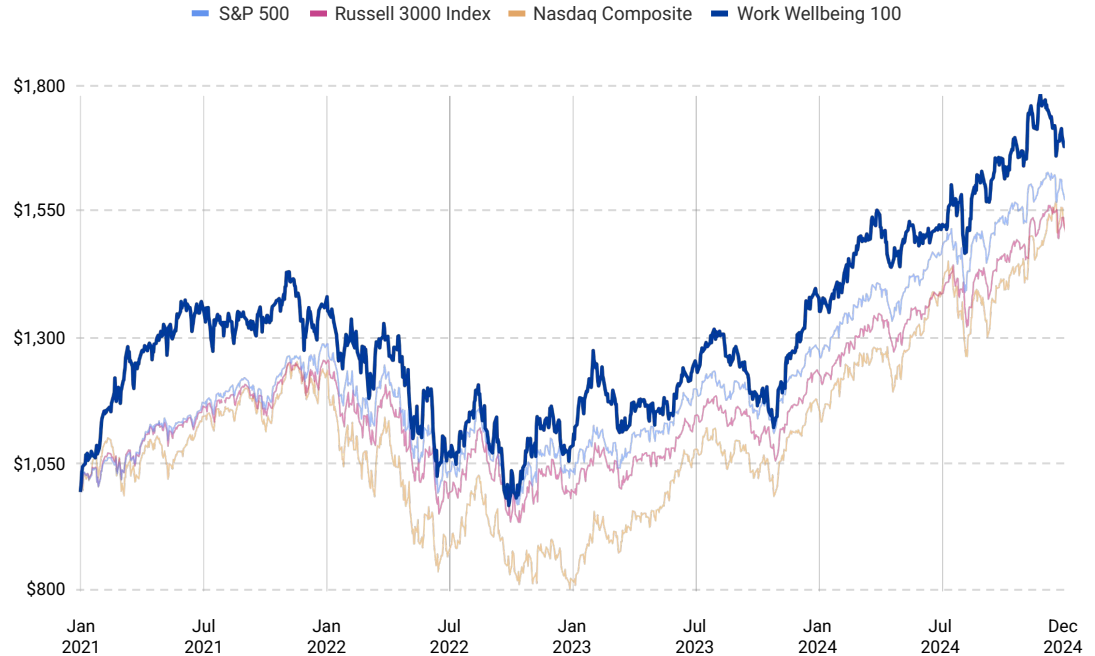
Companies with higher levels of employee wellbeing outperform the stock market

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 that 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 31 December 2024.⁴

Work Wellbeing 100 and Stock Performance

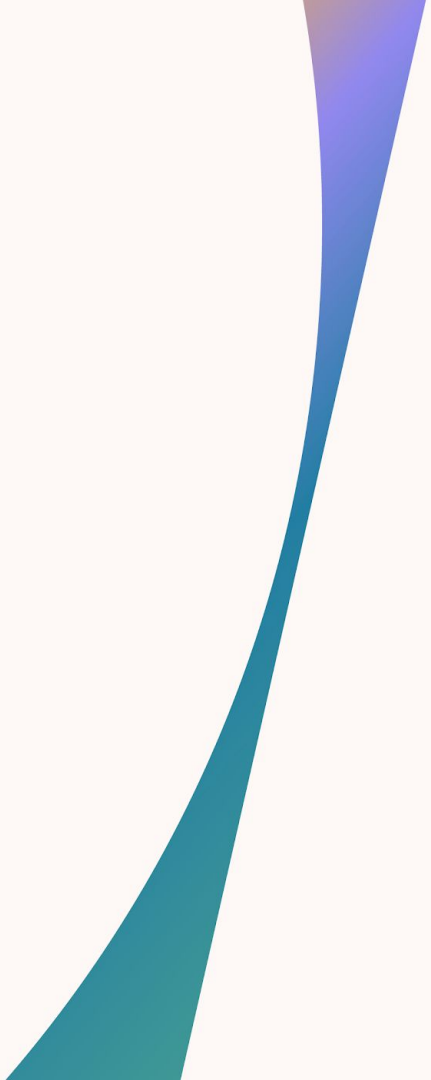


⁴A \$1,000 investment in the Work Wellbeing 100 companies in January 2021 would have grown to \$1,713 by January 2025 compared with \$1,589 had they invested instead in the S&P 500. Note: The Work Wellbeing 100 is not an investable index.

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

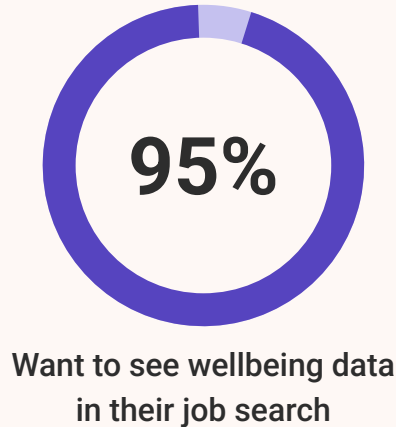
04

Work Wellbeing Attracts Talent

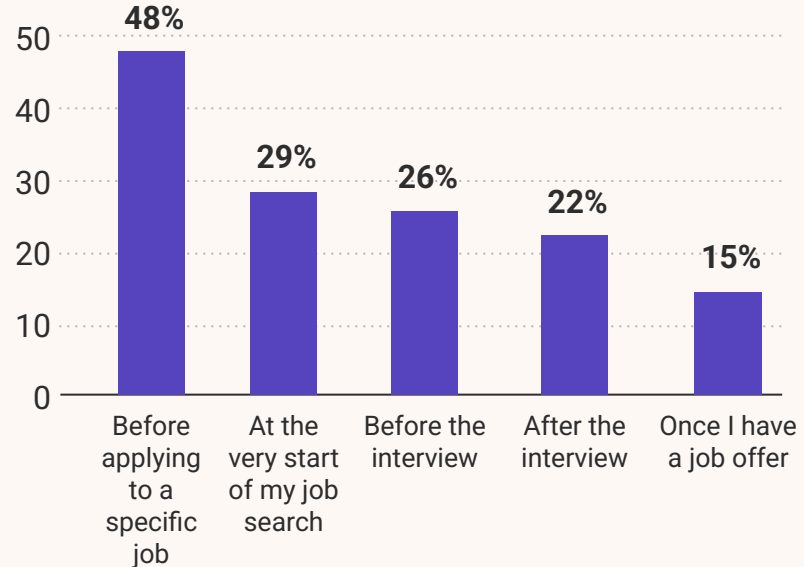


Talent Attraction: Wellbeing in the Search

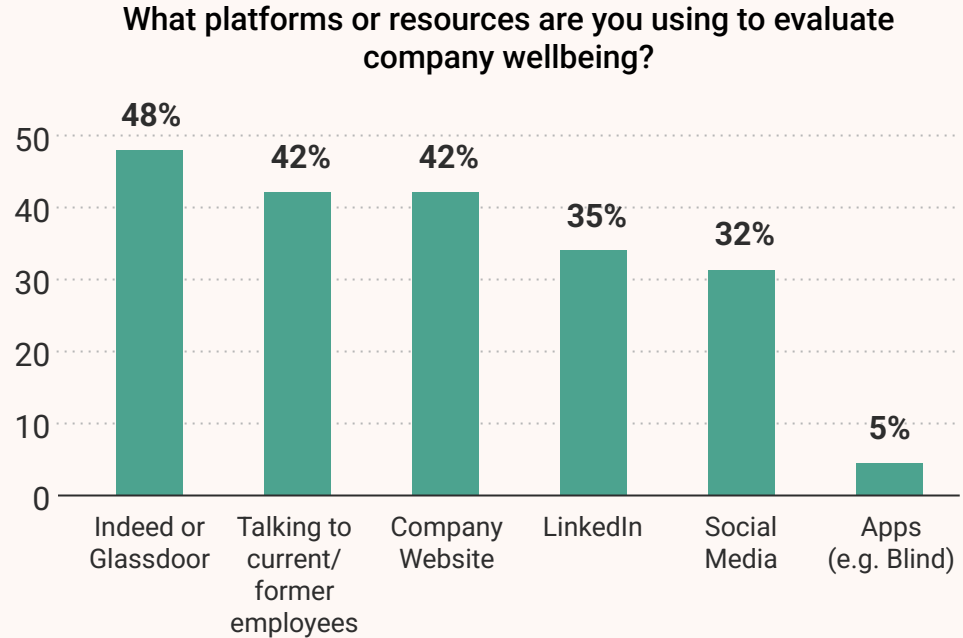
95% of jobseekers want to see wellbeing data to evaluate companies throughout their job search; it's most critical before they even spend time applying.



When is work wellbeing data most helpful?

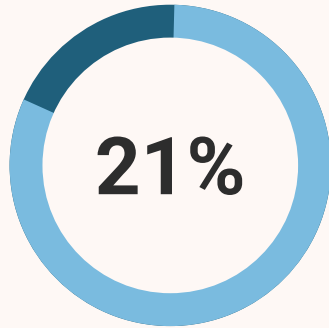


Candidates are evaluating your company's work wellbeing culture using a variety of sources.



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.

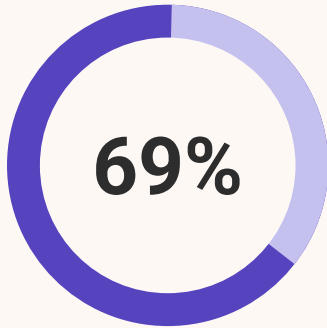


Only 21% of people report that they always or often ask the interviewer about work wellbeing

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

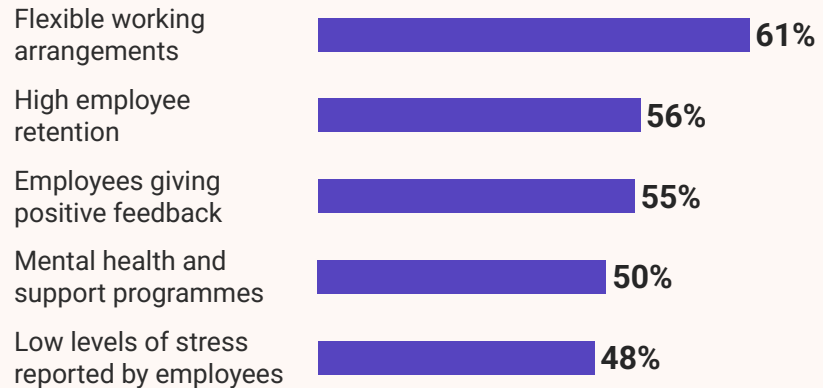


Two thirds of people expect employers to prioritise wellbeing; tangible signs of prioritisation include flexible working, high retention and positive employee feedback

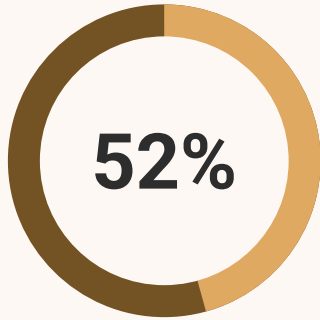


69% of people believe companies absolutely have a responsibility to create environments where people can thrive

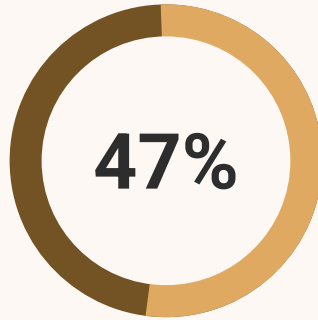
What would make you believe a company is truly prioritising work wellbeing?



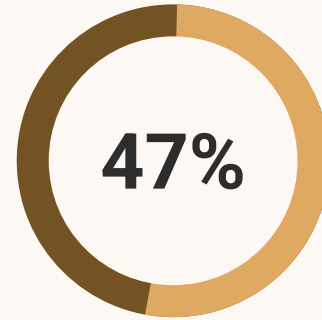
People agree that their wellbeing is tied to the success of their business. However, their companies are not always prioritising it.



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

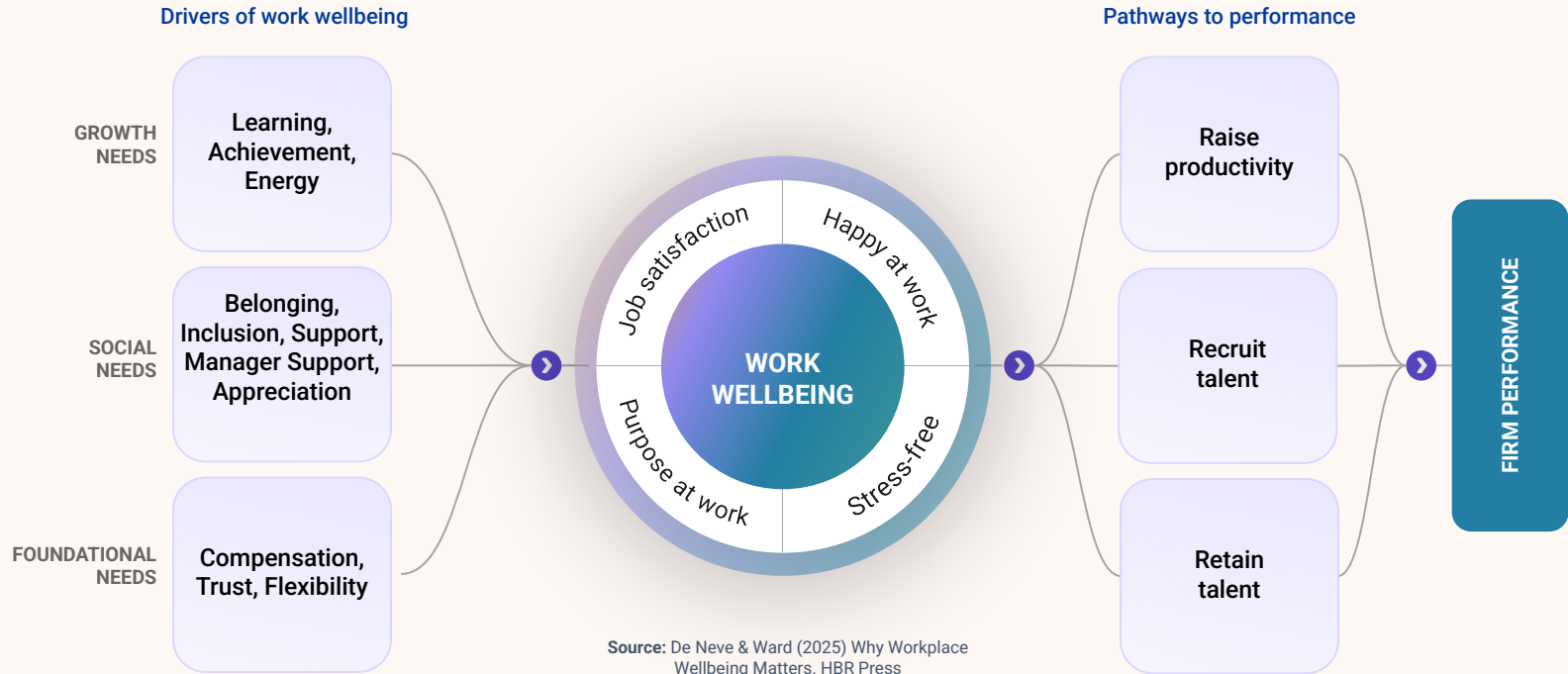
05

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.

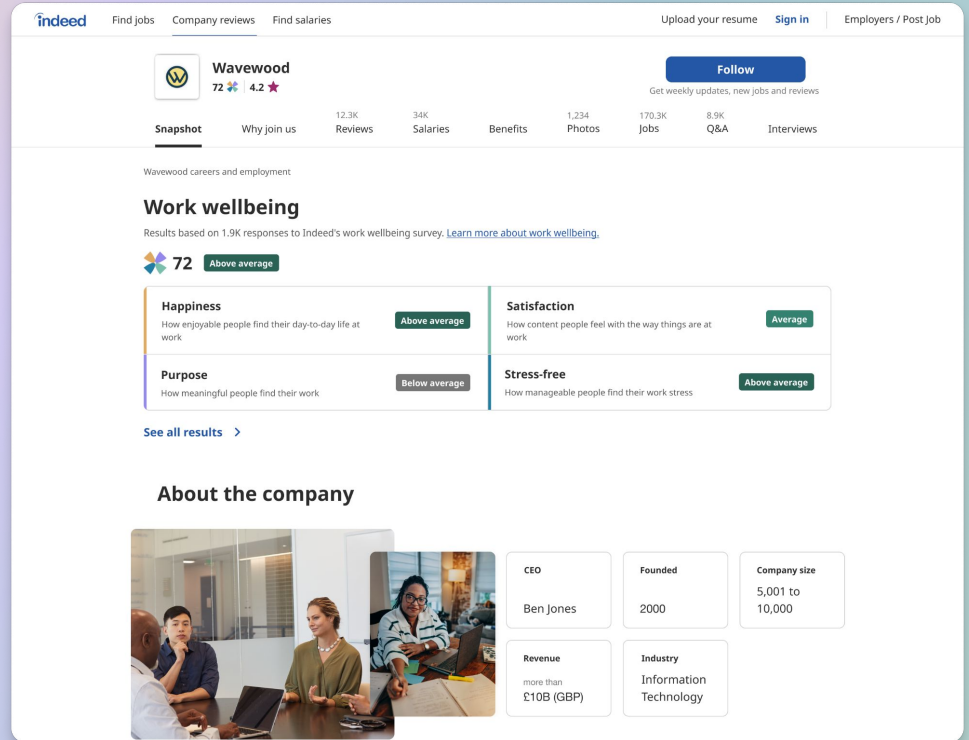


Indeed Work Wellbeing Score

The world's largest data set on work 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 285 million data points** from more than 30 million individuals globally, and counting

⁵2025 Indeed.com data, based on number of survey responses globally



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

The screenshot displays the Indeed Work Wellbeing Score page. At the top, the Indeed logo is on the left, and navigation links for 'Post a job', 'Find resumes', 'Solutions', and 'Resources' are on the right. A 'Sign in' button is also present. The main heading is 'Indeed Work Wellbeing Score'. Below this, the section 'Discover work wellbeing' explains that the score is developed in partnership with leading happiness and wellbeing experts and measures how people feel at work. It notes that the score is available for thousands of companies on Indeed, providing insights to guide job seekers and help employers build better work cultures. A 'Browse companies' button is located below the text. To the right, a mobile app interface is shown, displaying the 'Wavewood' company profile with a 'Follow' button and a 'Work wellbeing' section showing a score of 72. Below the main text, a 2x2 grid of icons represents the four key outcomes of the score: Happiness (orange), Purpose (purple), Satisfaction (teal), and Stress (blue). To the right of this grid, the text 'Fueled by the world's largest study of work wellbeing¹' is displayed, followed by the heading 'How people feel at work-and why'. This section explains that the Work Wellbeing Score is a composite metric measuring happiness, purpose, satisfaction, and stress. It also lists key drivers measured: accomplishment, appreciation, belonging, energy, fair pay, flexibility, inclusion and respect, learning, support and encouragement, trust, and being well-managed. A final note encourages users to take the first step in prioritizing work wellbeing by sharing the survey with their workforce today. A 'Work wellbeing survey' button is located at the bottom right.

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](#)

Wavewood 72 4.3
Follow
Get weekly updates, new jobs, and reviews.
Snapshot Why join us Reviews Salaries Benefits
Wavewood Careers and Employment
Work wellbeing
Results based on 1.9K responses to Indeed's work wellbeing survey. [Learn more about work wellbeing.](#)
72 Above average
Happiness
How enjoyable people find their day-to-day life at work.
Above average


HAPPINESS


PURPOSE


SATISFACTION


STRESS

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](#)

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 world⁶ with over 615 million jobseeker profiles⁷ 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.

Source: ⁶Comscore, Total Visits, March 2025

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

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**

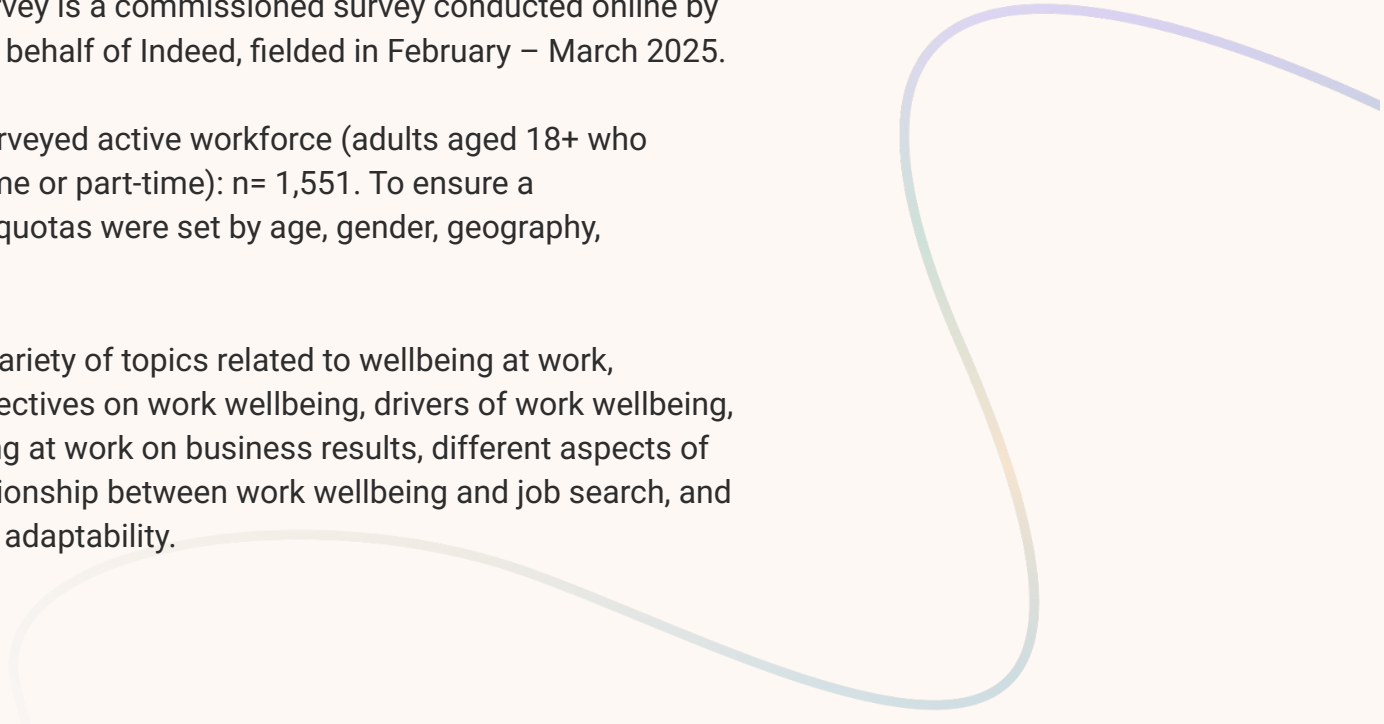
January 2022 – March
2025

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
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 (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%
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 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

Companies with higher levels of employee 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 Prioritises Work Wellbeing in Employer Evaluation



Insight

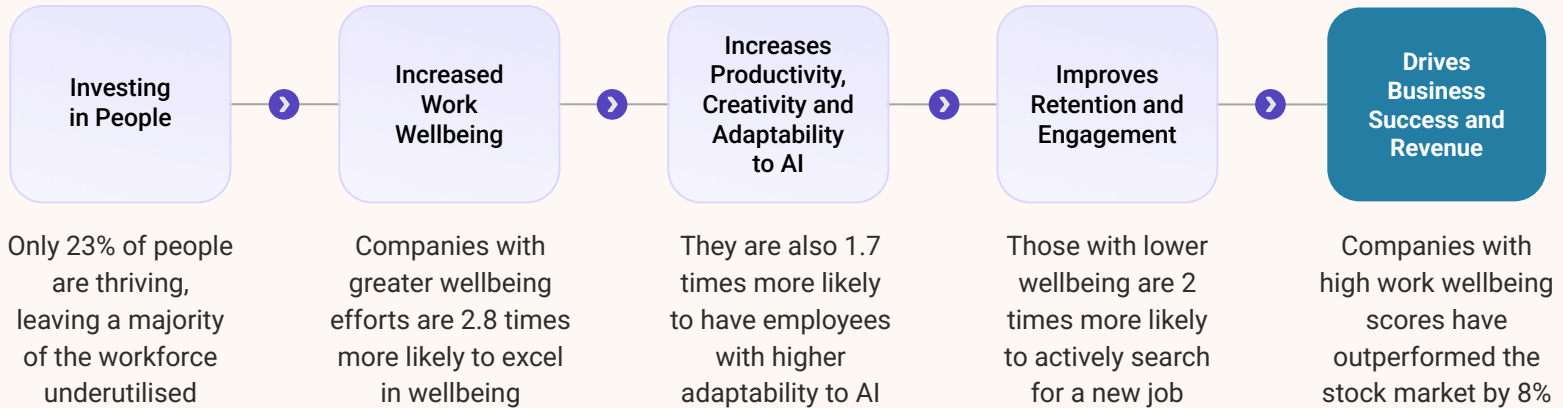
95% of jobseekers want to see wellbeing data when evaluating companies – especially *before applying*. Top signals of strong wellbeing include flexible work, high retention and positive feedback from employees.



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.





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