



2025 Report: How Work Wellbeing Fuels Performance

A strategic imperative for sustained success



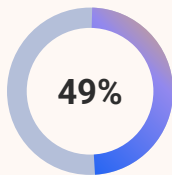
indeed

Executive summary

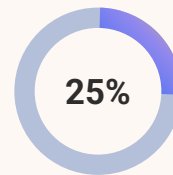
Today's talent is looking for more than just a pay cheque. They want purpose, support and the opportunity to thrive.

Yet only 25% 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.

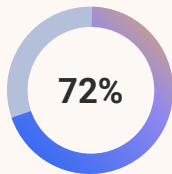
But the inverse is also true: when organisations invest in work wellbeing, they unlock higher performance, stronger retention and greater adaptability. Indeed empowers companies to turn work wellbeing into a competitive advantage.



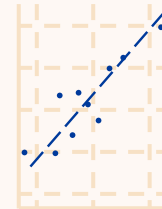
Workers' expectations have evolved, with 49% of people reporting their expectations are higher than just last year; with Gen Z showing an even bigger increase.



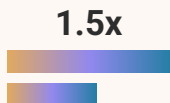
Worker wellbeing remains low. Just 1 out of 4 of survey respondents are thriving at work.¹



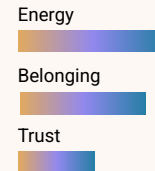
Wellbeing & adaptability to AI are connected. Employees at companies that prioritise wellbeing are more likely to be adaptable to AI vs. those that don't (72% vs. 42%).²



Wellbeing correlates with financial metrics – from valuation to ROI.



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 trust.

Indeed Work Wellbeing Report, based on a commissioned survey (n=1,609 AU 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 five-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=1,609 AU 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 & Behavioural 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.'

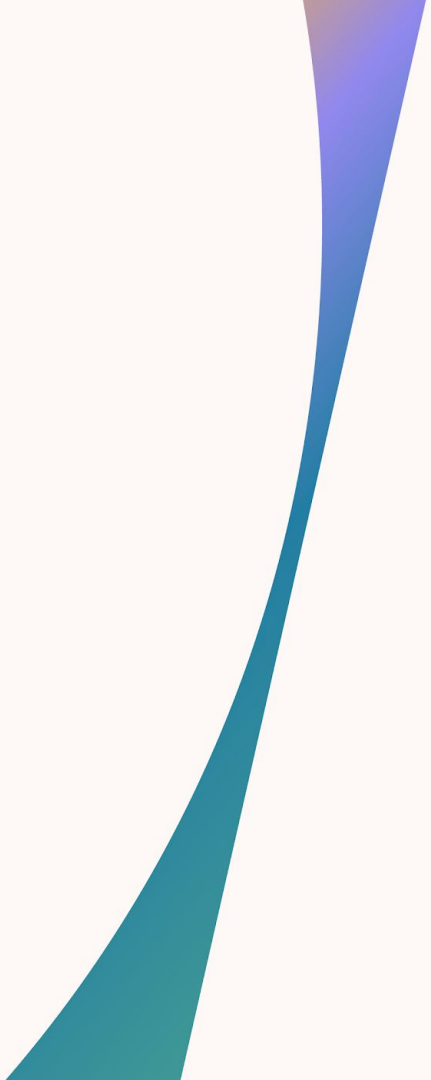


Kyle M.K.

Indeed Senior Talent Advisor

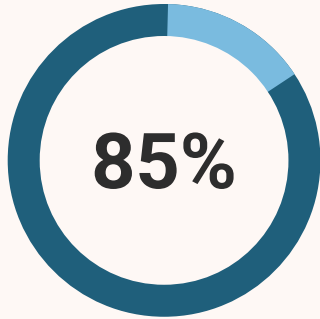
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The rise of work wellbeing

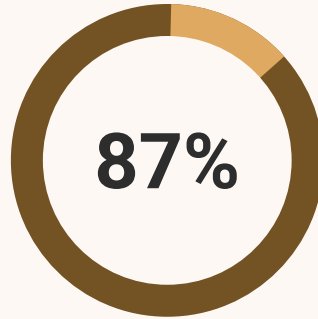


Driven by optimism

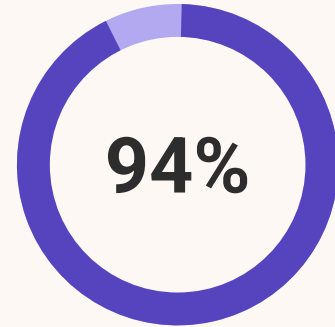
Today's talent craves more than just a pay cheque; they're driven by an optimism that happiness at work is possible for them.



Agree that work can provide more than a pay cheque



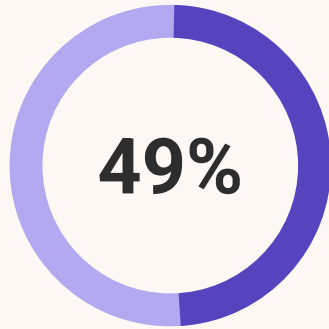
Report it's important to find companies that care about how you feel



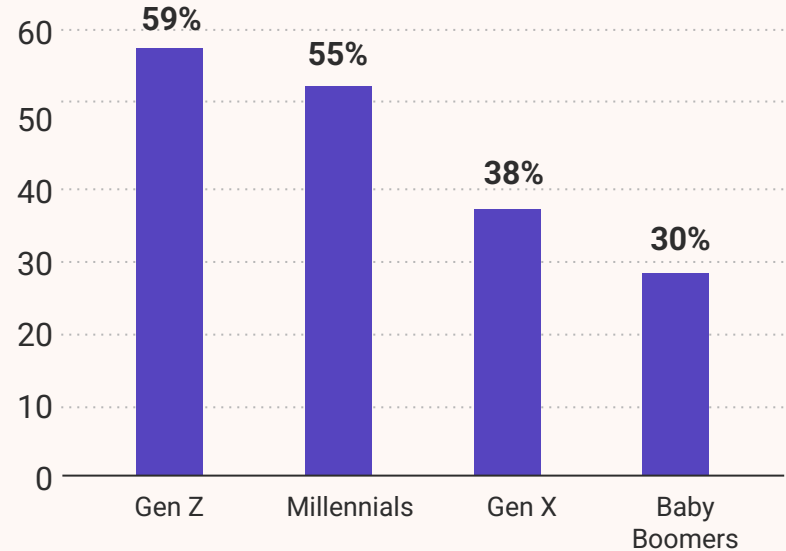
Believe it's possible for people to be happy at work, most of the time

A lasting shift

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



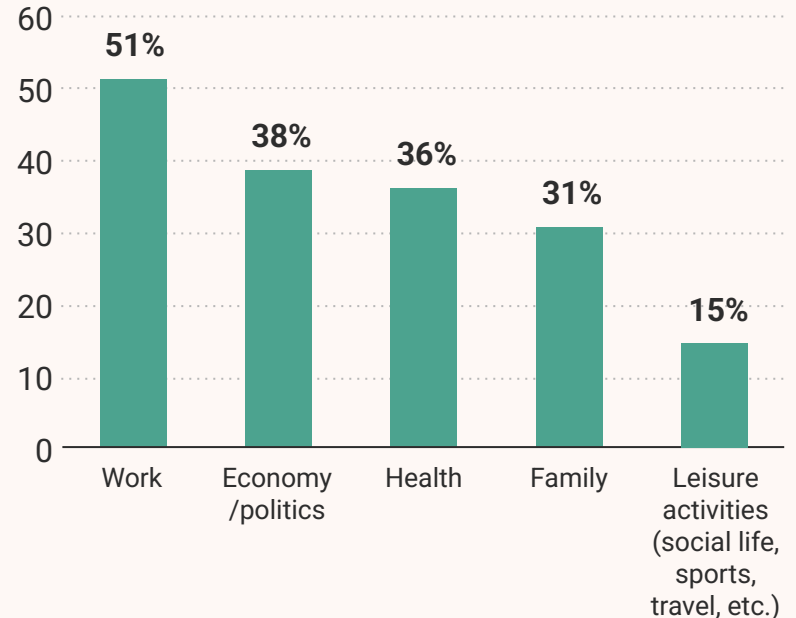
of people report their work wellbeing expectations are **higher than they were just one year ago**



Work as a top stressor

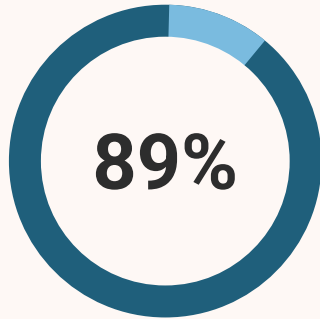
And for good reason.
Work is still the number one stressor for people on a daily basis, despite heightened economic and political conditions.

Top life stressors
(Select up to 3):



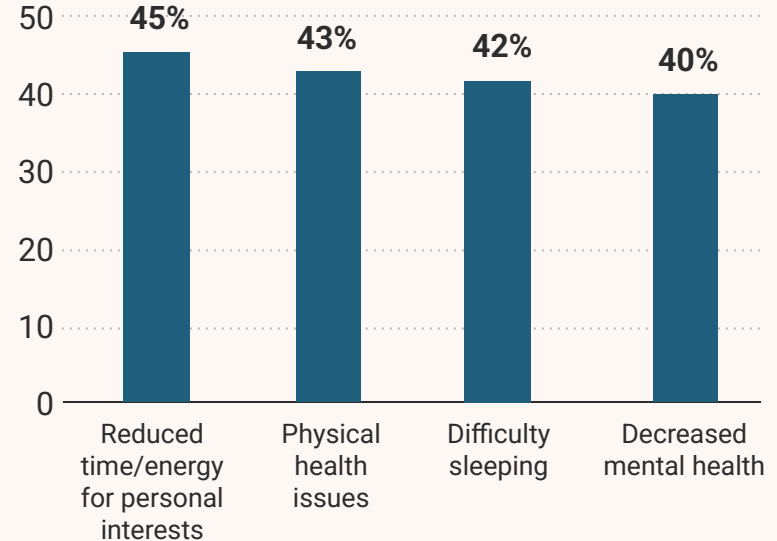
Work-life feedback loop

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.



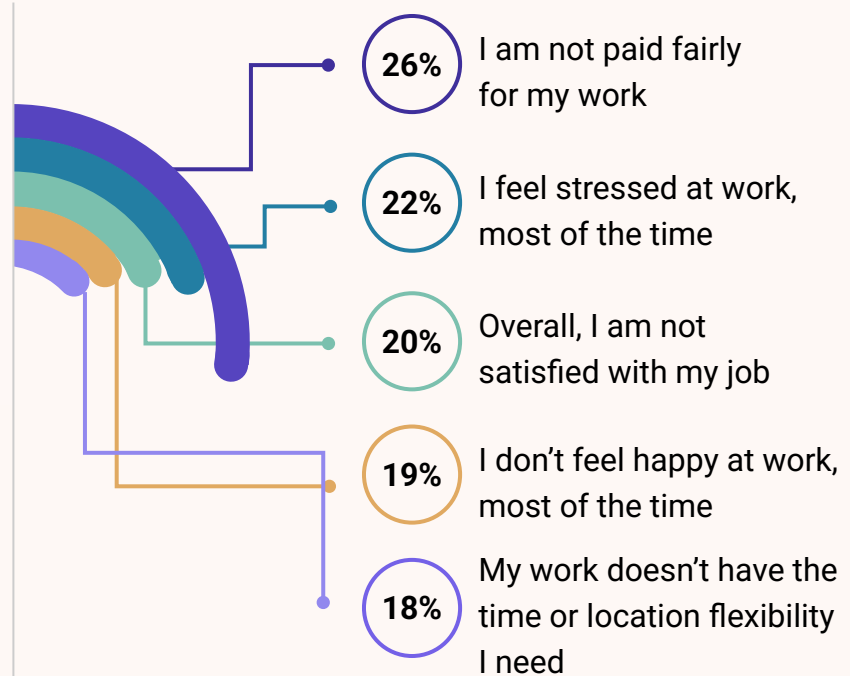
Report their happiness at work affects their mood at home

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



Low wellbeing fuels exits

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



Indeed Work Wellbeing Report, based on a commissioned survey (n=1,609 AU 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=1,387).

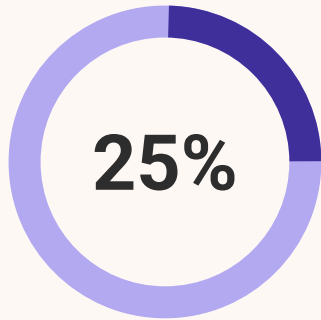
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A wake-up call:

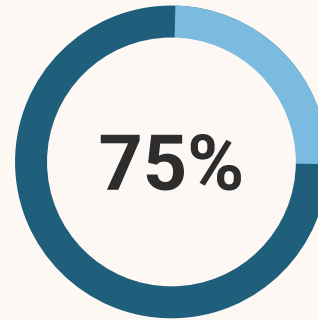
Only 1 in 4 are thriving

State of work wellbeing today

Only 25% of people are thriving at work, with many feeling low happiness, high stress, low purpose or low satisfaction.



of people are thriving at work

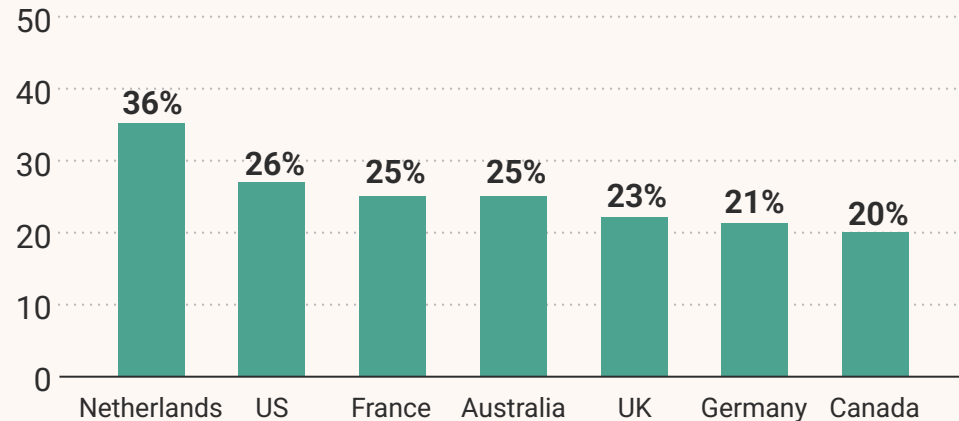


of people are not thriving at work

Global comparison

Work wellbeing is low across the countries analysed, with Australia in line with global trends.

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)

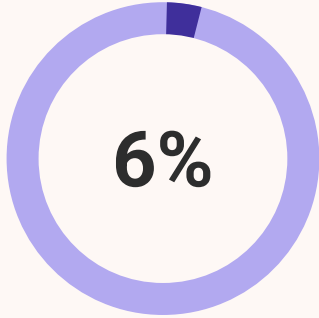
Base: Total respondents

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

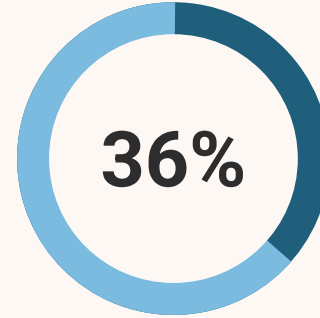
Indeed Work Wellbeing Report, based on a commissioned survey (n=1,609 AU adults), conducted by Forrester Consulting, 2025.

A major stress gap

Employees with lower work wellbeing are six times more likely to regularly experience stress at work



Only 6% of people indicate a **higher level** of work wellbeing are regularly stressed at work



While 36% of people that indicate a **lower level** of work wellbeing are regularly stressed at work

The levers of work wellbeing

What actually drives work wellbeing?

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

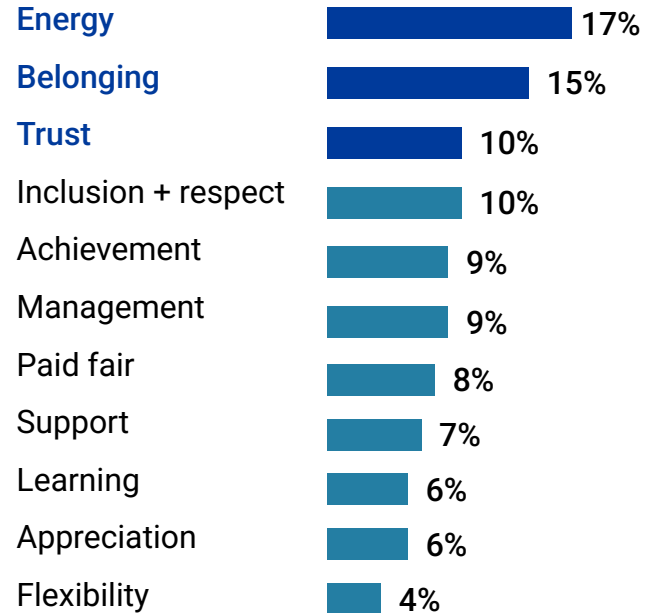
However, when Forrester analyses what drives work wellbeing statistically, a different story emerges.

These three drivers come out on top:

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

Indeed Work Wellbeing Report, based on a commissioned survey (n=1,609 AU adults), conducted by Forrester Consulting, 2025.

Driver analysis results

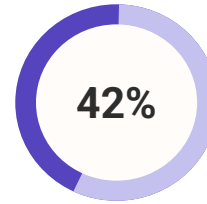


Barriers to work wellbeing

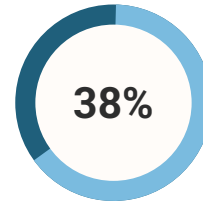
Almost half of the workforce struggles with feeling energised, belonging and trusting people they work with.

This represents a clear and actionable barrier to work wellbeing.

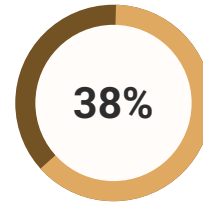
Indeed Work Wellbeing Report, based on a commissioned survey (n=1,609 AU adults), conducted by Forrester Consulting, 2025.



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

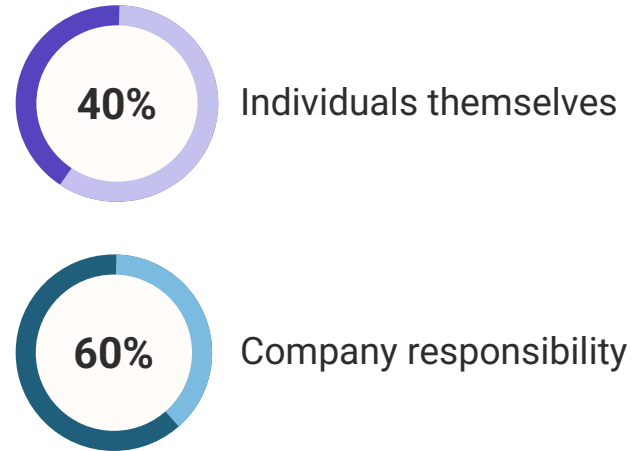
While people view wellbeing as a shared responsibility, organisations are expected to lead.

Everyone plays a role in worker wellbeing:

Direct managers are expected to contribute most (22%), then executives (14%), along with CEO (11%) and HR (11%).

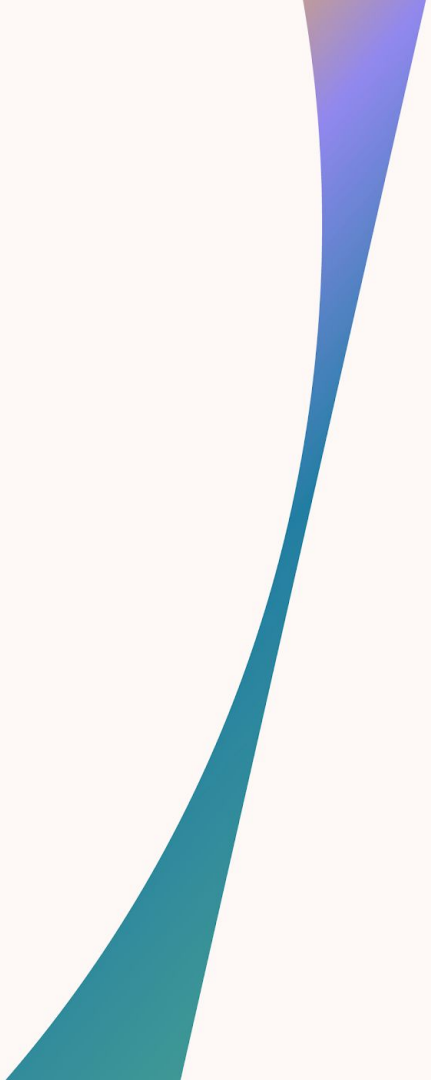
Indeed Work Wellbeing Report, based on a commissioned survey (n=1,609 AU adults), conducted by Forrester Consulting, 2025.

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



03

Power performance & AI adaptability



Productivity: Achieve goals 1.5 times more often

People with high wellbeing achieve goals at work 1.5 times 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

60%

Achieving most goals at work

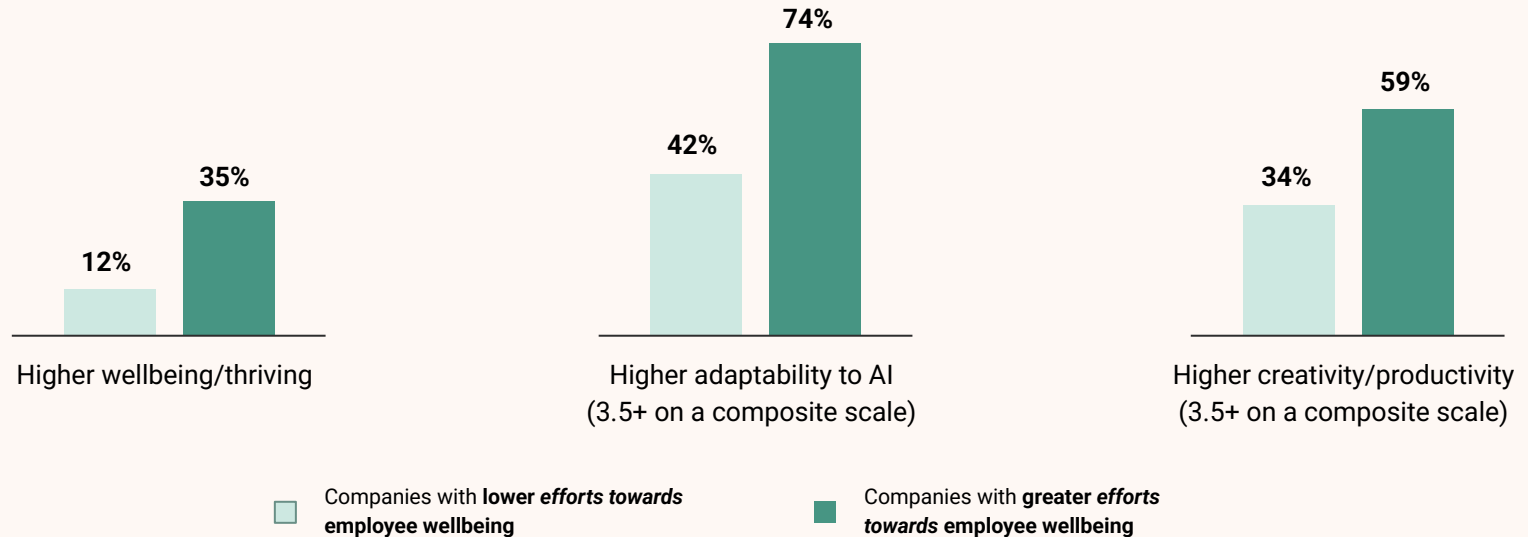
93%

Indeed Work Wellbeing Report, based on a commissioned survey (n=1,609 AU adults), conducted by Forrester Consulting, 2025.

Note: Base for 'Lower wellbeing' = 1,204; Base for 'Higher wellbeing/Thriving' = 405

Productivity: Adaptability & creativity

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



Indeed Work Wellbeing Report, based on a commissioned survey (n=1,609 AU 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=714 Thriving; n=681 Adaptability to AI; n=710 Creativity/Productivity); Base for 'Higher efforts towards wellbeing' = (n=895 Thriving; n=869 Adaptability to AI; n=891 Creativity/Productivity).

People with low wellbeing are twice as likely to be searching for a job.

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

vs

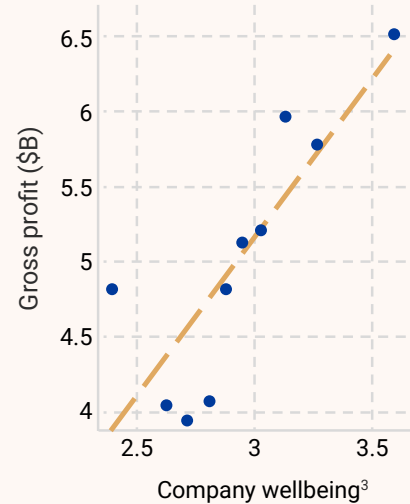
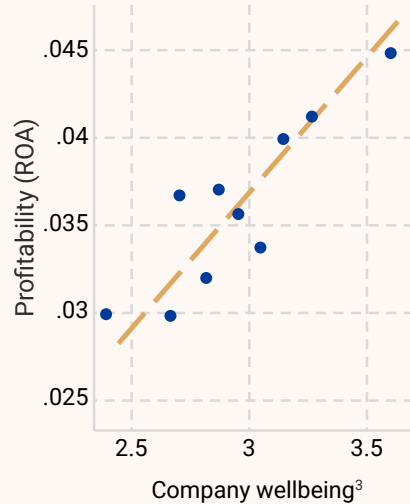
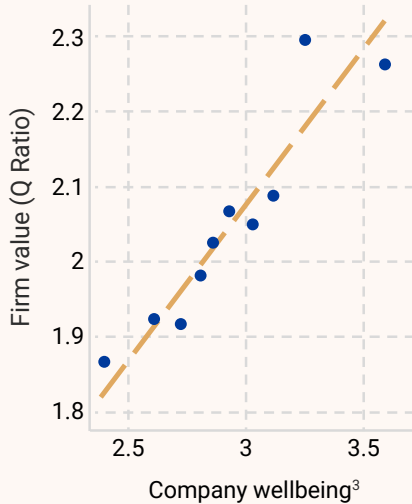
Respondents that indicate a **higher level** of work wellbeing

40%	Are actively searching for a job	20%
49%	Plan to stay at current job for next 12 months	82%

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)

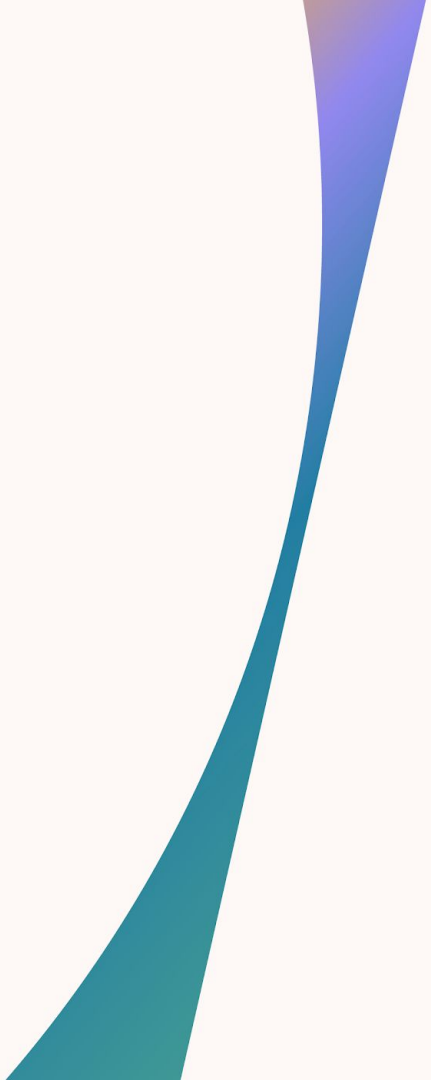


The analysis looked at 1,782 publicly listed companies in the United States using data from around one million employee surveys across these organisations.

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

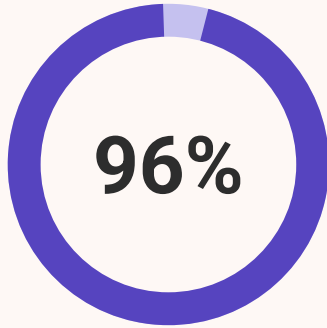
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Work wellbeing
attracts talent



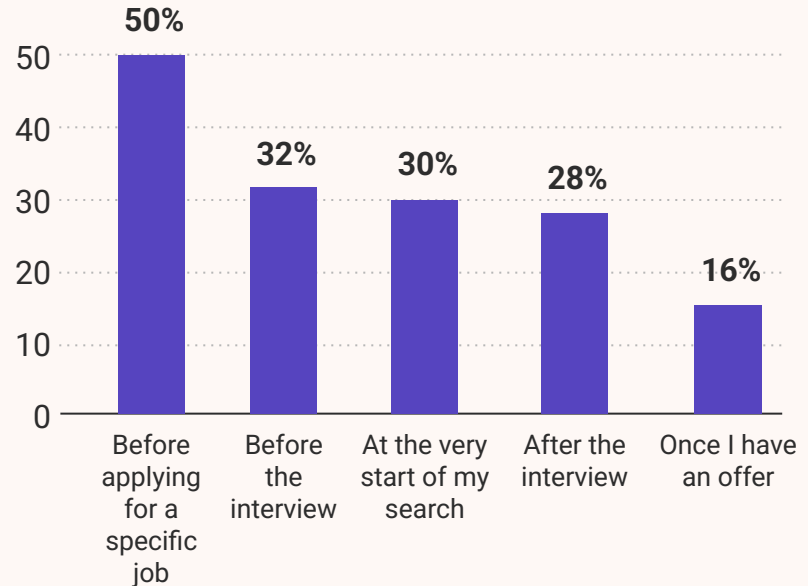
Talent attraction: Wellbeing in the search

96% 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.



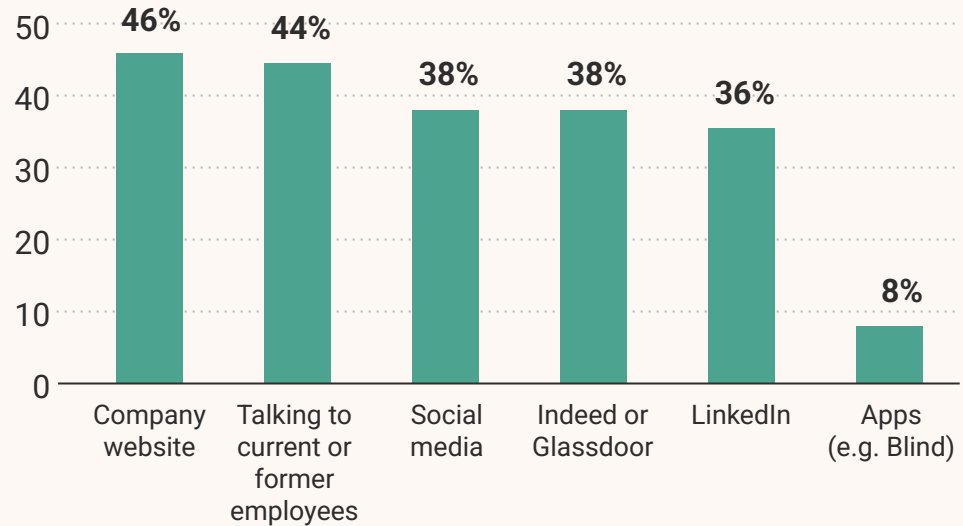
Want to see wellbeing data
in their job search

When is work wellbeing data most helpful?



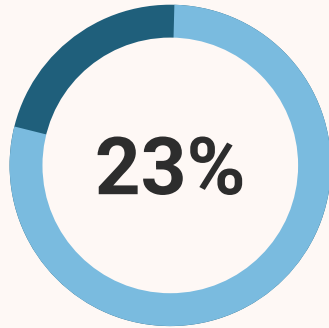
Candidates are evaluating your company's work wellbeing culture using a variety of sources.

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



Talent attraction: Interviews

Interviewers mentioning work-life balance is a top signifier of work wellbeing, followed by engagement and empathy from the interviewer.



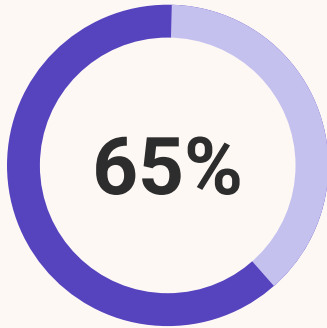
Only 23% of people report that they always or often ask the interviewer about work wellbeing

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



Talent attraction: Evaluating work wellbeing

High employee retention and flexible work arrangements are top signals that a company is truly prioritising wellbeing.



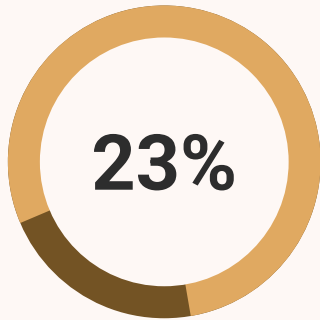
65% of people believe companies absolutely have a responsibility to create environments where people can thrive

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

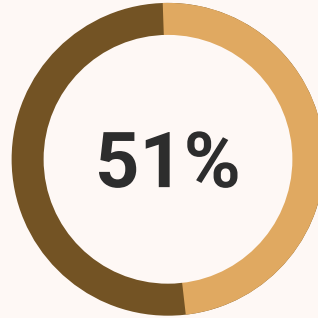


Trust in work wellbeing efforts

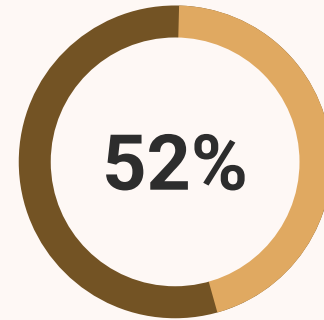
While there is a strong scepticism that companies actually care about work wellbeing, almost half of people report their company is taking some form of action.



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



My company is doing all it can to improve employee wellbeing



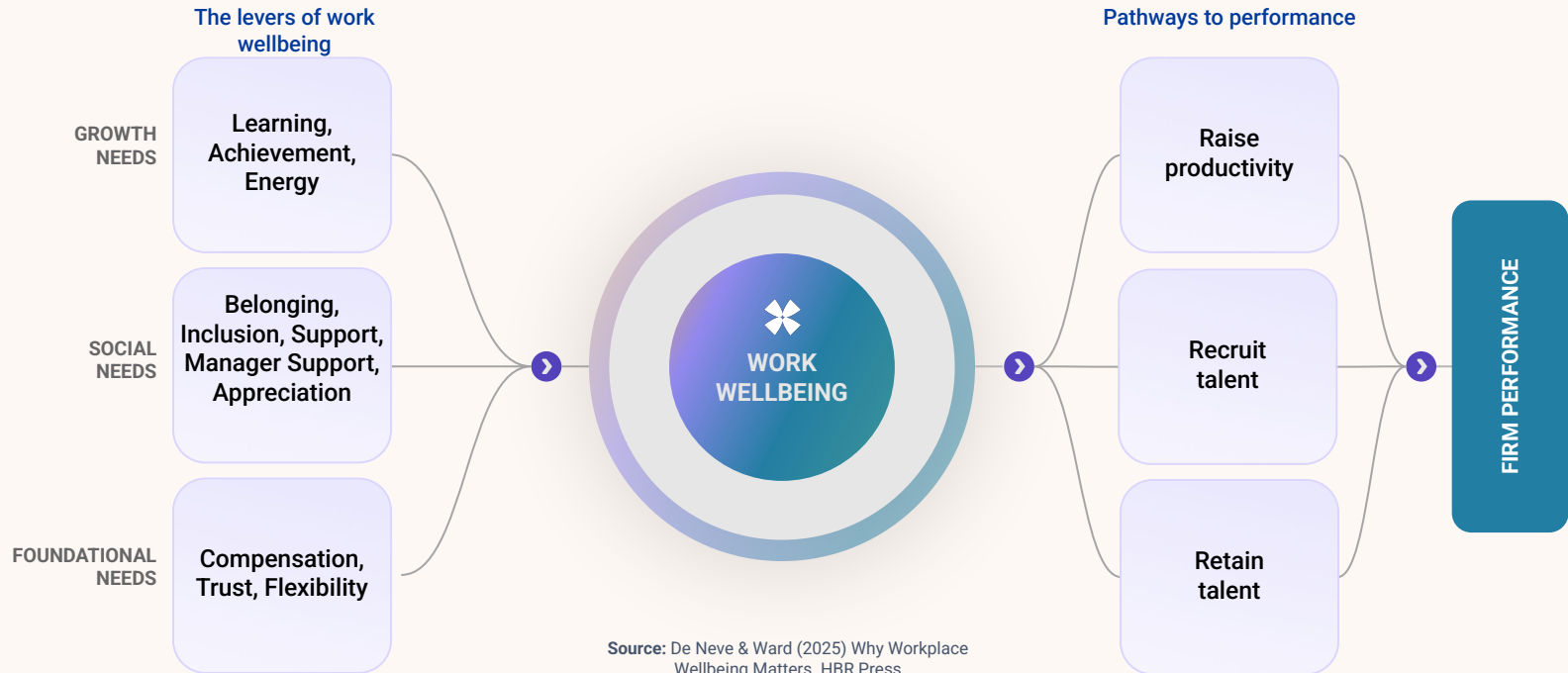
My company measures work wellbeing

05

Summary & taking action

Summary

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



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

Start prioritising work wellbeing:
[Share the survey with your team today.](#)



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

 indeed





Appendix:

About Indeed and Methodology



About Indeed

Indeed is the number one 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 judgement and connection.

Source: ⁶Comscore, total visits, March 2025
Indeed data (worldwide), job seeker accounts with a unique, verified email 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

97K

new jobs
added each
month, in
Australia

6.3M

Indeed Apply
applications
completed
each day
on mobile,
worldwide.

24.1M

phone
interviews on
Indeed
worldwide

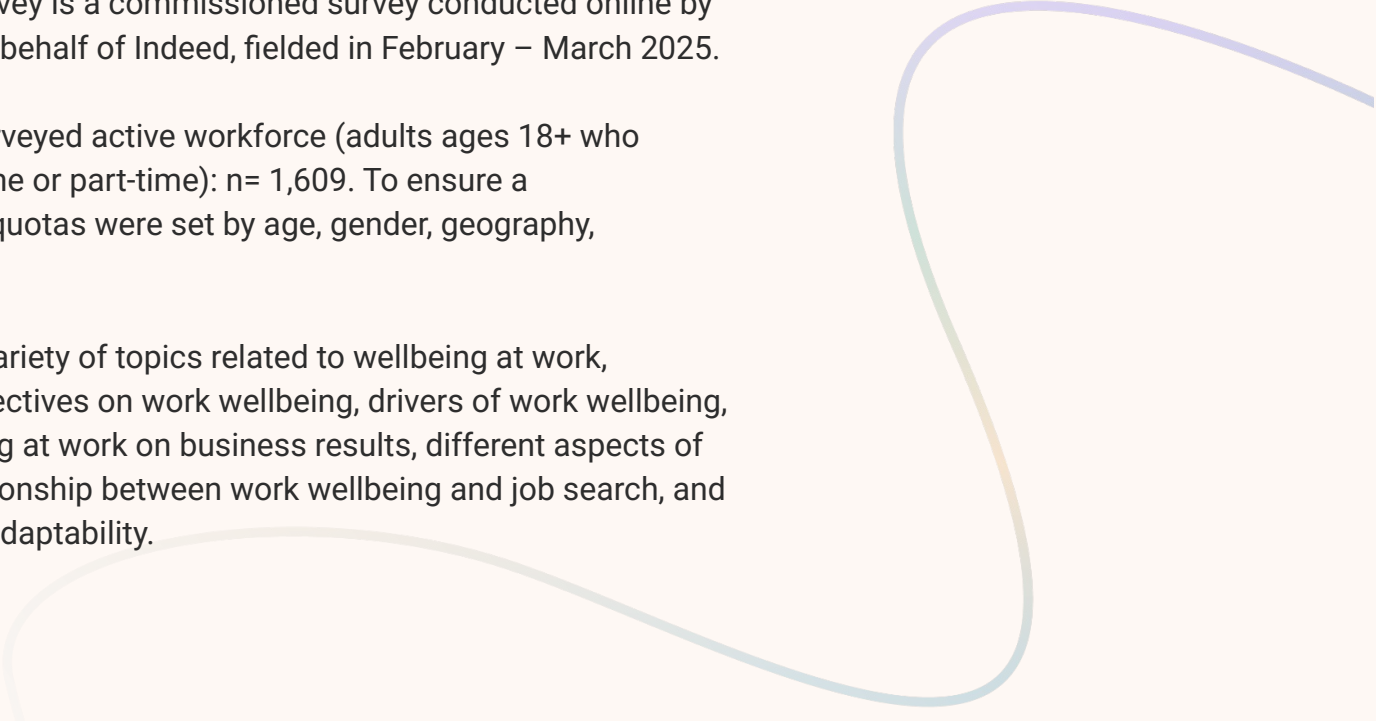
January 2022 – March
2025

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 ages 18+ who reported working full-time or part-time): n= 1,609. 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

Indeed Work Wellbeing Report, based on a commissioned survey (n=1,609 AU adults), 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 25% of employees are thriving at work



Insight

The vast majority (75%) of **the workforce is not thriving** – reporting low happiness, high stress, low satisfaction or lack of purpose.



Implications

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)
- **Trust** (trusting co-workers and leadership)



Implications

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

Companies with strong wellbeing initiatives are **1.7 times more likely** to excel in AI adaptability.



Implications

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 **1.5 times more** often
- Are **less likely to be searching** for a new job



Implications

Wellbeing 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

96% 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 employees giving positive feedback.

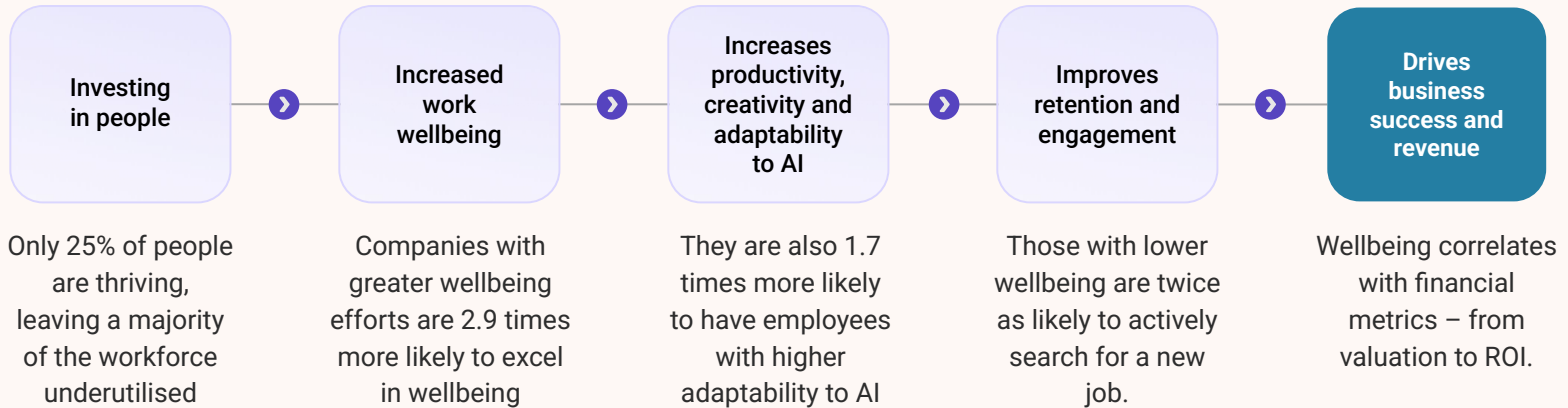


Implications

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.

People & performance

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



The Indeed logo, featuring the word "indeed" in a blue, lowercase, sans-serif font. A small blue arc is positioned above the letter "i".

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