



# Work Relationship Index

2025





# Introduction

Work isn't working. Across the world, knowledge workers are feeling unfulfilled and falling out of sync with the very systems meant to support them.

In 2025, only 20% of knowledge workers say they have a healthy relationship with work, down 8 points from 2024. While fulfilment, leadership and people-centricity continue to decline, 62% report that their companies' expectations have increased over the past year.

Global disruption, economic pressure and uneven access to technology have created a workplace experience that feels more demanding but less rewarding. In 2025, 45% of desk-based workers feel their company is prioritizing profit over people, further emphasizing that now is a critical time for change.

As a result of these rising demands, employees across the globe are rethinking what they want from work, and whether their current companies can provide it. This shift reflects a growing disconnect between organizational strategy and human experience.

Only 15% of knowledge workers say senior leadership demonstrates the behaviors and actions they ask from employees, and just 12% agree that people are encouraged to communicate their emotions at work. To bridge this gap

and increase employee fulfillment, businesses need to equip knowledge workers with the proper tools and technology and foster environments where people feel seen, supported and empowered to grow.

This cultural disconnect is even more pronounced among younger generations. Gen Z and Millennials, now the majority of the workforce, are more likely to pursue side hustles, demand flexibility and expect purpose-driven leadership. They are reshaping the social contract of work, actively seeking out organizations that align with their values and disengaging from those that fail to keep up.

In this climate, fulfilled employees drive better business outcomes. Knowledge workers are seeking more than just basic benefits or flexibility. They want to feel fulfilled, recognized and supported by leaders who understand the human side of work and, more importantly, are willing to take meaningful action. The opportunity ahead is to lead through change by creating a work experience that aligns technology, leadership and culture in service of people.

The path forward is not about incremental improvements but about reshaping the future of work to meet the modern workforce where they aspire to be.



# Executive Summary

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## 01. Work is **not working**

Fulfillment has hit a new low. In 2025, just 20% of knowledge workers say they have a healthy relationship with work – down 8 percentage points from 2024. The most dramatic decline is among business leaders. Across industries and regions, employees report feeling overburdened, undervalued and under-resourced, with 62% of desk-based workers feeling that demands and expectations have increased over the past year. The 2025 Work Relationship Index shows a workforce pressured by disruption, disconnection and rising demands.

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## 03. **Fulfillment drives growth**

The right leadership can make or break fulfillment. Fulfilled employees are 3 times more likely to feel connected to colleagues and achieve work-life balance, yet only 16% of knowledge workers trust senior leaders to make the right decisions for their people, down 13 percentage points from last year. High-EQ leadership is a key driver, but it remains in short supply – especially in large organizations. To address the fulfillment deficit, leadership should shift from a directive approach, to focusing on these key enablers...

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## 05. **AI is top of workers' wish lists**

4 in 10 knowledge workers use AI daily, and the more frequently AI is used, the higher the WRI Score. Businesses who invest to bring AI into daily life for their workforce are reaping the rewards, as 42% of those with a healthy work relationship use work-provided AI tools daily. However, access to technology is currently uneven: just 21% of knowledge workers are proficient in AI, compared to 56% of ITDMs and 44% of business leaders. Furthermore, 42% of knowledge workers say their company doesn't have a clear AI strategy. Bridging this gap is key to workforce transformation.

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## 02. Disruption impacts WRI, but we **control 85% of our relationship with work**

From leadership and culture to technology and wellbeing, organizations have the power to reshape work for the better. Despite external forces and global disruption, 85% of the factors we measured influencing work relationships are within an organization's control. The successful leaders of today must take proactive ownership to deliver positive work experiences.

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## 04. **Technology is a positive enabler**

When knowledge workers are given the right tools and technology, their relationship with work increases significantly. Specifically, 42% of those with a healthy relationship with work use AI tools daily at work. While technology alone cannot drive a company forward, it can empower the full potential of employees and drastically improve their work experience.

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## 06. **Gen Z are the Future of Work – writing their own rules**

51% of Gen Z workers now have a side hustle, and they place high value on autonomy, purpose and tech fluency. Gen Z and Millennials are primarily driving AI adoption in the workplace, but they're also demanding more: flexibility, career growth and ethical alignment with employers. They're not waiting for the future of work – they're building it. And they'll leave companies that can't keep up.

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# Disruption, disconnection and rising demands

Only 20% of knowledge workers have a healthy relationship with work.

And, IT decision makers and business leaders both experienced significant decreases in their relationship with work, with business leaders experiencing the largest decrease at 17 percentage points year-over-year.

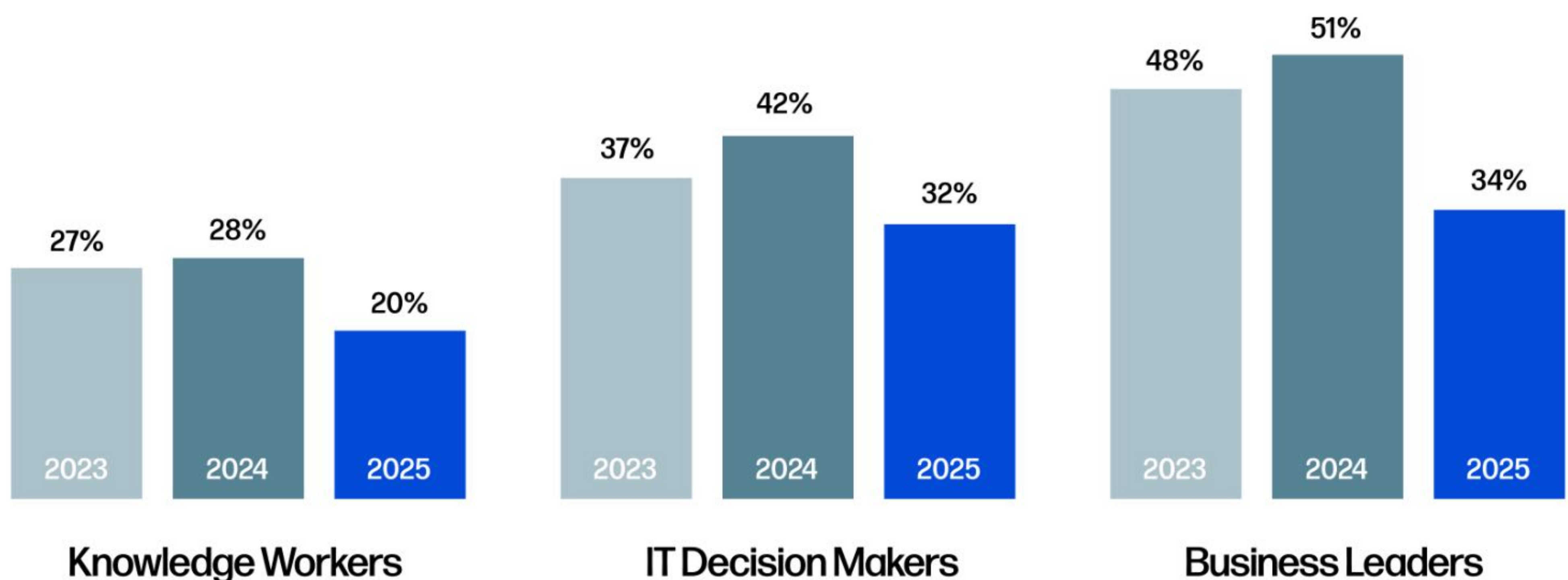
Furthermore, polarization in fulfillment is the greatest at larger companies, with a reported 25-point gap in workplace satisfaction between knowledge workers and business leaders.

Fulfillment has hit a historic low. HP research reveals that in 2025, just 20% of knowledge workers say they have a healthy relationship with work - down 8 percentage points from 2024.

Business leaders saw the steepest decline in workplace satisfaction, with ITDMs and knowledge workers also falling by 10 and 8 percentage points, respectively. Disruption, disconnection and increasing demands have created a workforce under strain.

This decline is not inevitable. Organizations that act now are better positioned to retain talent and build resilience. Immediate action is especially important as only 61% of knowledge workers globally say they see themselves at their current company in two years.

% very happy with relationship to work



# Workers in developed markets are half as likely as emerging markets to be 'very happy' with their relationship with work









HP research found that employees' relationships with work are struggling across the globe, ranging from a low of 4% in Japan to a high of 34% in Saudi Arabia. While emerging markets overall report a healthier relationship with work, knowledge workers across both markets experienced an 8% drop in their work relationship experience.

The sharpest percentage-point declines were in the USA (-15%) and Indonesia (-16%). Only Brazil held steady at 29% across knowledge workers this year, despite 71% of these knowledge workers feeling that demands and expectations have increased.









This global snapshot highlights an immediate need to adapt strategies to local realities while addressing universal drivers of fulfillment.

## % very happy with work relationship, by market

### Developed Markets Average: 15%

%	% point change	Market Name
19%	-15% ▼	 USA
19%	-3% ▼	 Germany
18%	-7% ▼	 Spain
17%	-4% ▼	 France
15%	-8% ▼	 Canada
15%	-11% ▼	 UK
14%	-13% ▼	 Australia
4%	-5% ▼	 Japan

### Emerging Markets Average: 28%

%	% point change	Market Name
34%		 Saudi Arabia
33%	-13% ▼	 India
29%	0 -	 Brazil
28%	-16% ▼	 Indonesia
27%	-4% ▼	 Mexico
20%		 Argentina

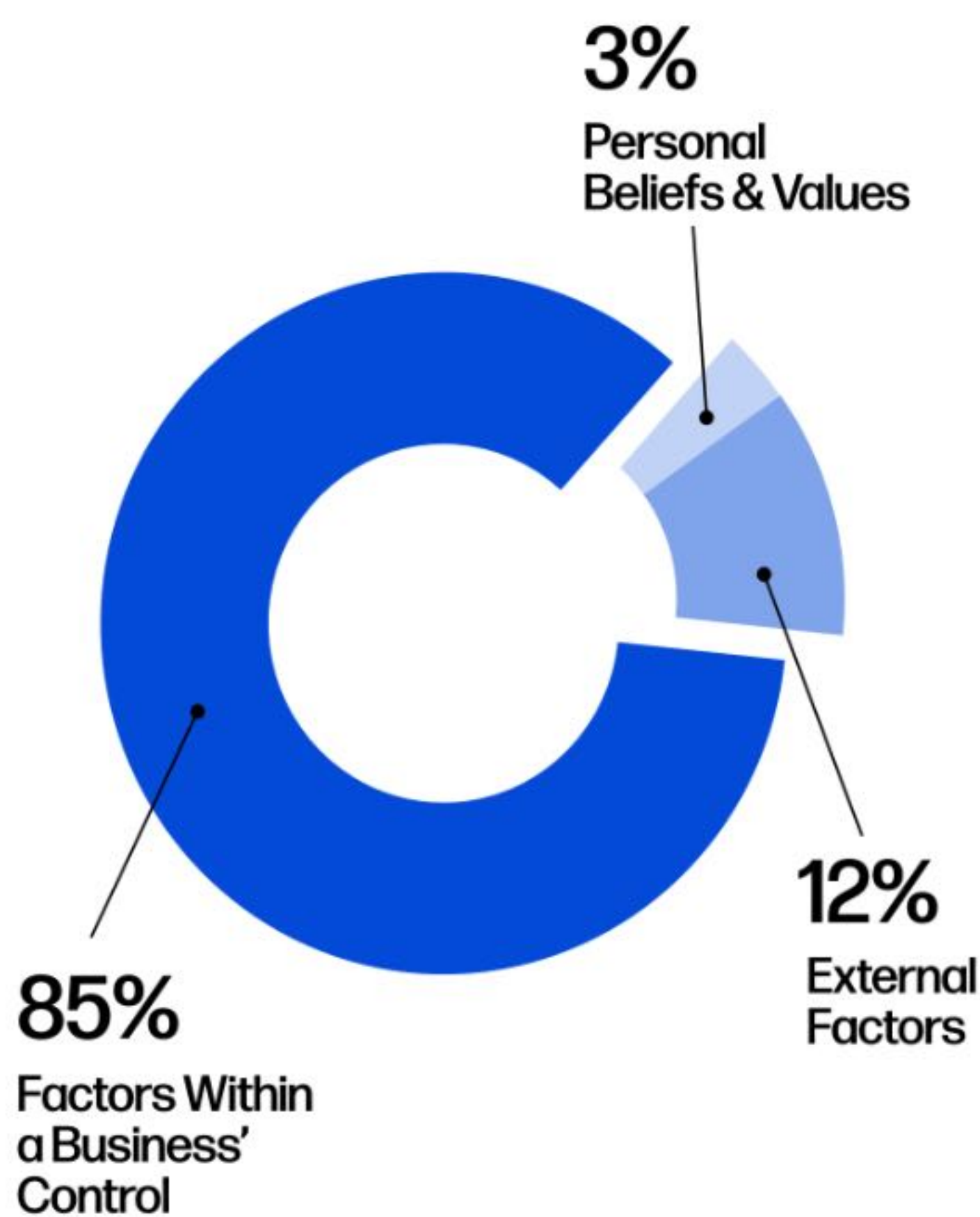
▲ ▼ Significant higher / lower vs. previous year

# Businesses control the factors that matter most

Our relationship with work is impacted by the world we are in, who we are as individuals and, most importantly, by our experience of work itself.

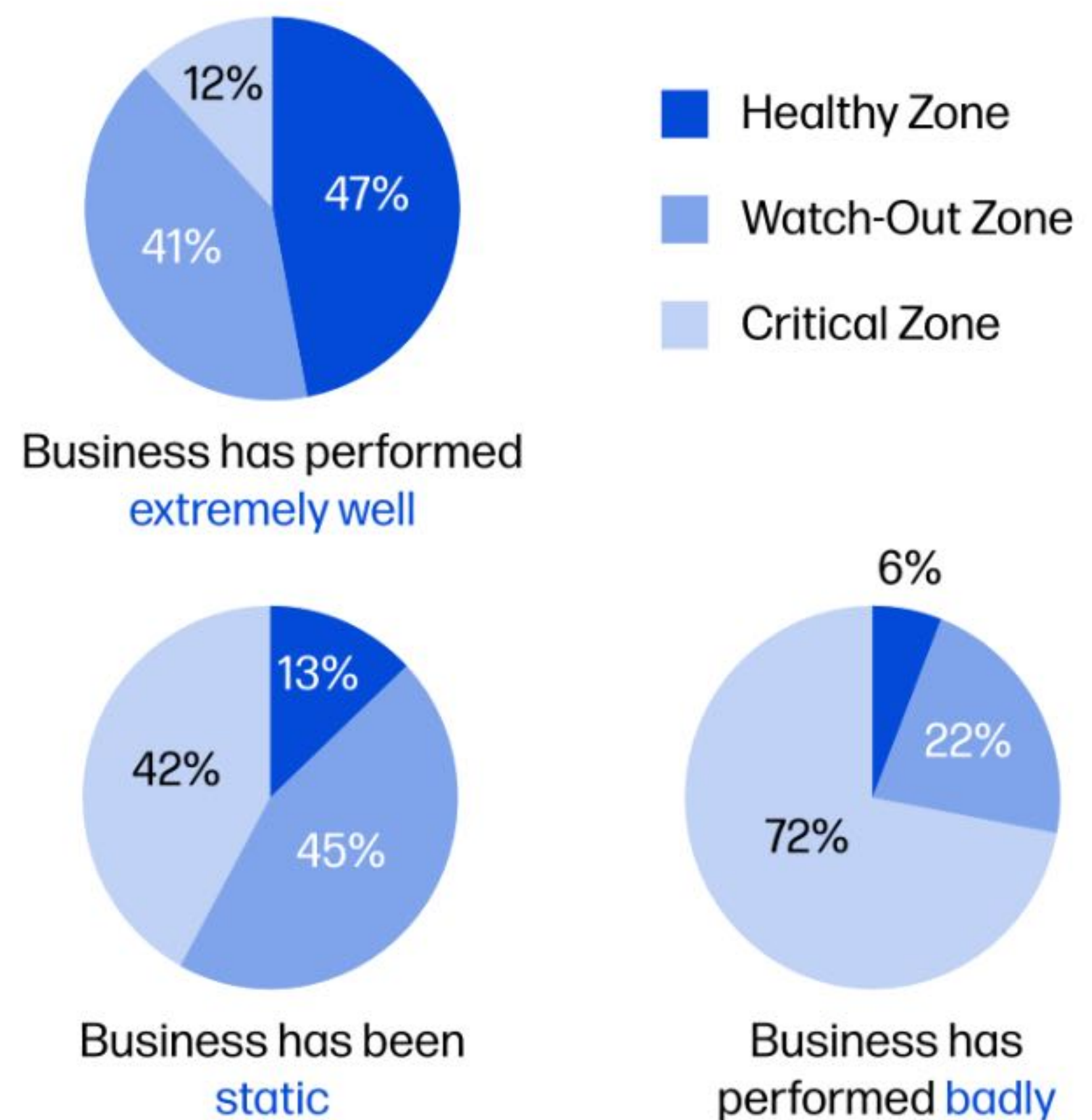
Despite external forces and global disruption, 85% of the factors influencing workplace fulfillment that we measured are within an organization's control, presenting an opportunity for them to embrace the future of work.

## Main Influences on Work Relationships



## Stronger work relationships fuel better business outcomes

Work Relationship Index by business performance in past 12 months



For example, only 44% of knowledge workers say their work gives them a sense of purpose, and just 39% feel they receive adequate recognition for their contributions. These are fixable problems, and they matter.

Organizations committed to the growth, satisfaction and support of their employees have the capacity to turn this decline around. The data shows a clear relationship: companies with high growth are more likely to have knowledge workers in the Healthy Zone. Investing in employee fulfillment is more than a cultural priority; it's a strategic driver of growth.

# Workplace fulfillment is critical to driving business growth

Workplace fulfillment is no longer optional, it is a key driver of business growth. Fulfillment is the greatest influence on our relationship with work, impacting 30% of WRI scores.

In 2025, scores for Leadership and People Centricity declined significantly. Just 15% of knowledge workers say their senior leadership demonstrate the behaviors and actions asked of them, and only 12% agree that people are encouraged to communicate about their emotions. These gaps highlight a powerful opportunity for high-EQ leadership to elevate employee fulfillment and organizational efficiency.

HP has identified six enablers of workplace fulfillment: recognition, goal clarity, balance, collaboration, technology and focus & flow. These factors offer a clear blueprint for leaders who are shaping the future of work.

## Six key enablers facilitate professional fulfillment:

### Recognition

How people feel seen, valued and celebrated for their contributions.

25%

### Goal Clarity

How people understand what is expected and how work contributes to broader goals.

21%

### Balance

How people manage time and energy, so that they can focus on high-value work.

18%

### Collaboration

How people work together to create something new or solve a problem.

16%

### Technology

How people leverage tools and systems to simplify tasks & enhance quality of their work.

13%

Technology is a force multiplier that facilitates workplace fulfillment and amplifies the impact of other enablers on the list.

### Focus and Flow

How people immerse themselves in meaningful work and work without distractions.

8%

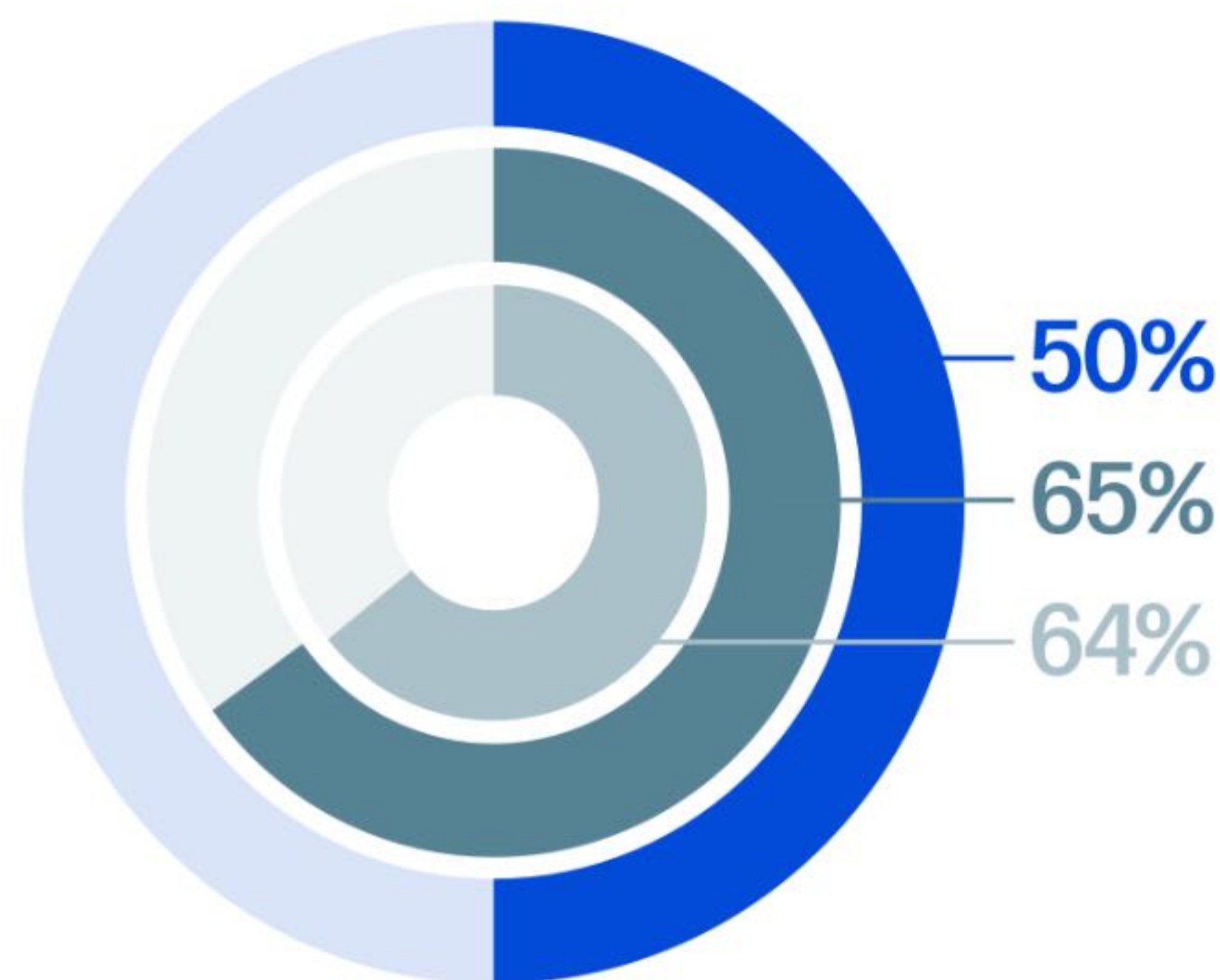
# AI and technology are proven positive enablers of workplace productivity, engagement and growth

42% of those with a healthy relationship with work use AI tools daily at work.

Businesses who invest in tools and bring AI into daily life for their workforce are reaping the rewards. Put simply, the more frequently employees leverage AI, the stronger their relationship with work.

% more optimistic about working life

What is making you more optimistic about your working life?



Knowledge Workers

IT Decision Makers

Business Leaders

Technology will improve work

AI is making me more efficient

42%

67%

57%

30%

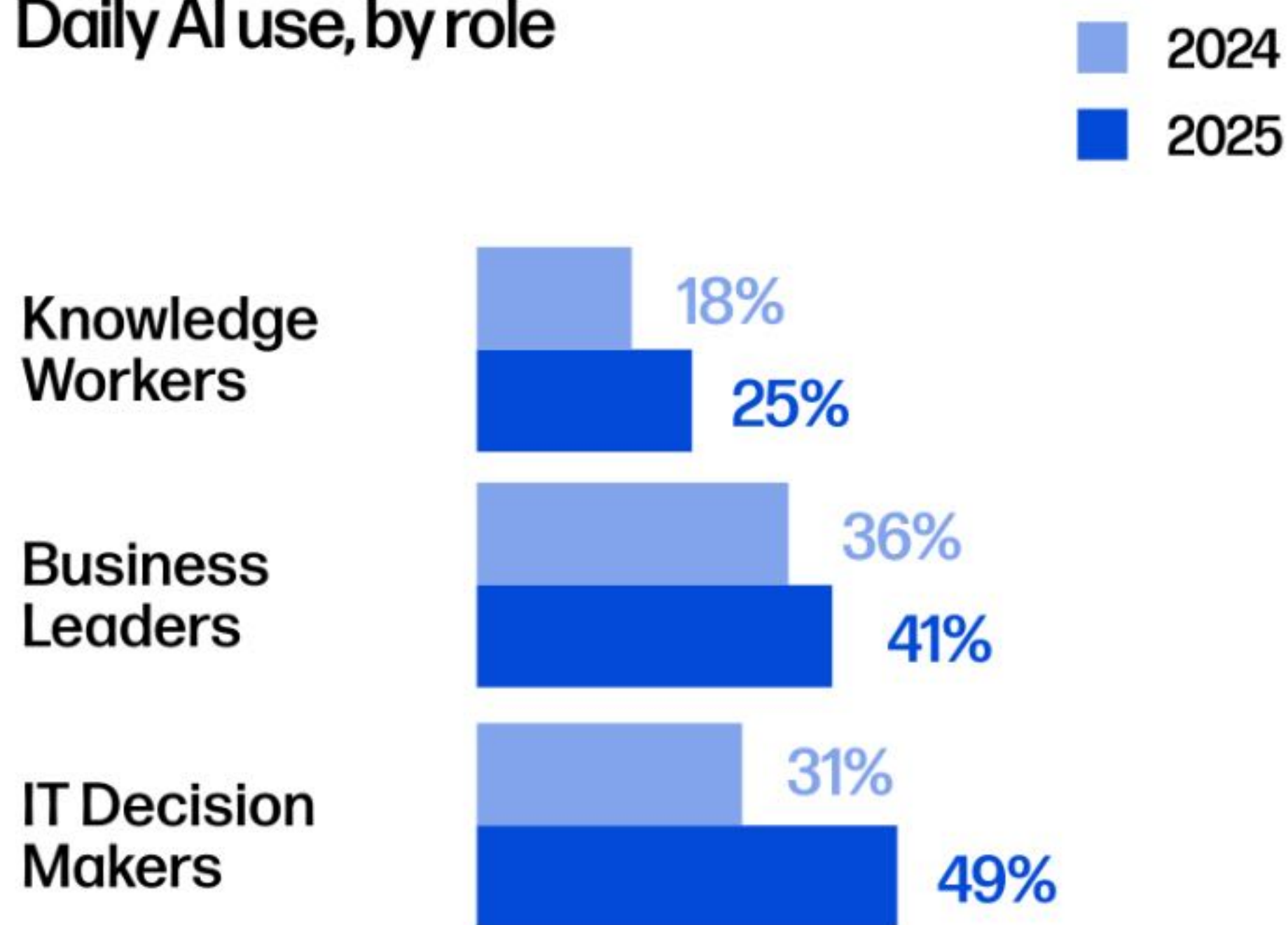
58%

48%

AI adoption is a force multiplier for optimism, productivity and retention. Widening access closes the performance gap and unlocks workforce potential.

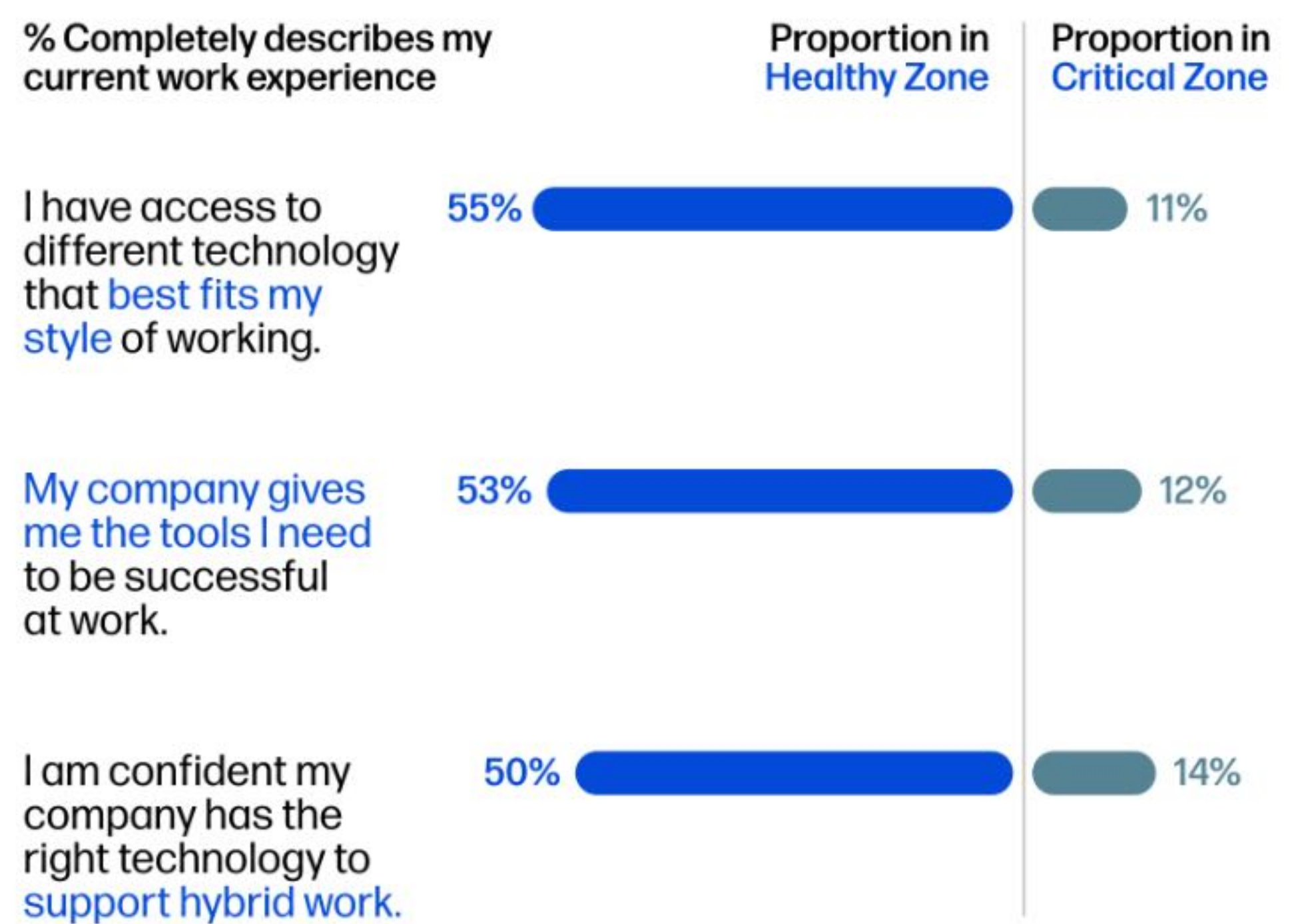
Access to AI and formal trainings are force multipliers for workplace optimism.

### Daily AI use, by role



**Adoption Gap:** knowledge workers are less than half as likely as IT decision makers to use AI daily at work.

### The impact of having a well-tooled workforce is clear



Businesses who invest in tools and bring AI into daily life for their workforce are reaping the rewards – 42% of those with a healthy work relationship use AI tools daily at work.

While AI and technology are proven productivity enablers, access and adoption are uneven across the workforce, leaving many without the tools to reach their full potential. Nearly 1 in 3 knowledge workers say they lack AI training, and 42% say their company doesn't have a clear AI strategy. However, fears around AI are reducing as businesses provide proper AI training and tools.

### Why it Matters

Democratizing AI access ensures employees across all levels and roles can leverage tools to work smarter, adapt faster and contribute meaningfully to business growth and productivity. This is about equity, engagement and unlocking collective potential.

### Key Insights

- **Adoption Divide:** Just 25% of knowledge workers use work-provided AI tools daily, compared to 41% of business leaders and 49% of IT decision makers.
- **Efficiency Gains with AI:** Only 30% of knowledge workers cite AI as making them more efficient, compared to 48% of business leaders and 58% of IT decision makers.
- **AI Enhances Optimism:** Workers with daily AI access are generally more optimistic about their future at work.

# Younger workers are reshaping work with new expectations

By the end of 2025, Gen Z will make up 27% of the workforce globally. As digital natives, their priorities are shaped by technology, personal values and a desire for flexibility – expectations influencing every generation in today’s workplace.

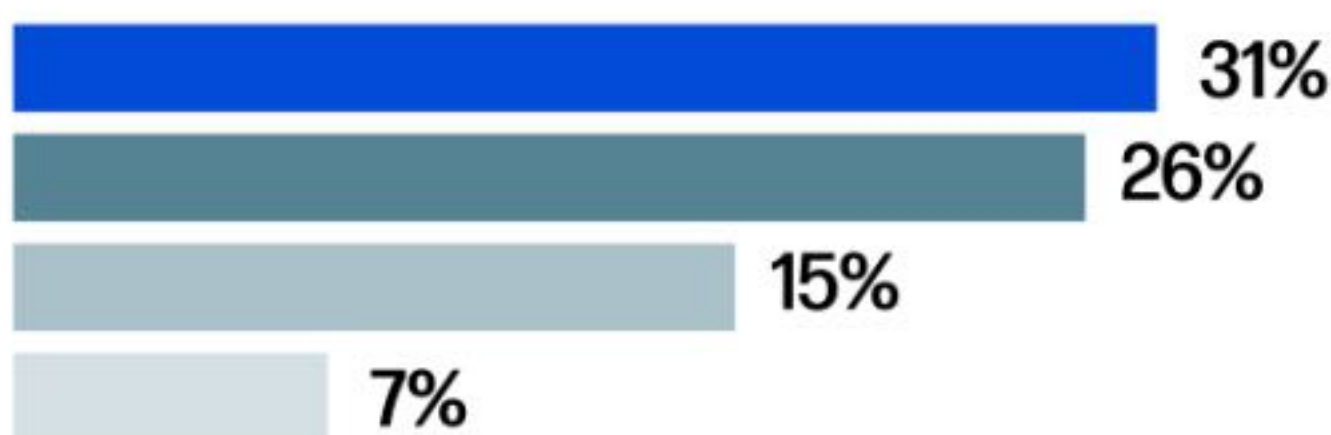
## Gen Z are the most competent, proficient, experts in AI

% understanding of AI

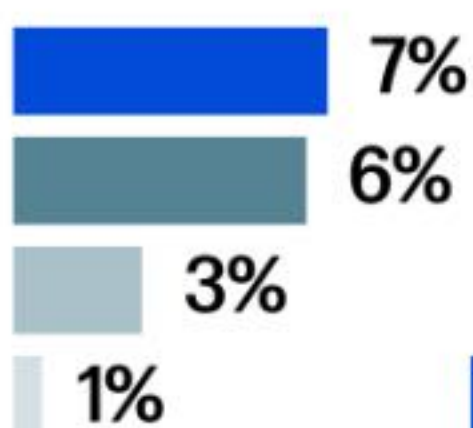
### Competent



### Proficient



### Expert



Gen Z   Millennial   Gen X   Boomer

Gen Z is leading all generations in AI adoption and tech fluency, driving new ways of working and reshaping workplace norms. Entrepreneurial by nature, 51% of Gen Z workers now have a side hustle, redefining what a career path can look like.

While Millennials often align with Gen Z’s focus on flexibility, they bring established experience in collaboration and digital transformation. Gen X and Boomers, meanwhile, are just beginning to adapt to these new technologies in the wake of younger generations. Cross-generational mentoring is unlocking value in both directions: younger professionals accelerate tech adoption, while older colleagues provide the critical business acumen that comes from years of experience.

The opportunity for business leaders lies in expanding knowledge sharing and mentoring between generations to create a more resilient, adaptive workforce. The future of work will belong to organizations that embed AI fluency across all levels, foster reciprocal knowledge exchange, and align flexibility and values with overarching organizational goals.



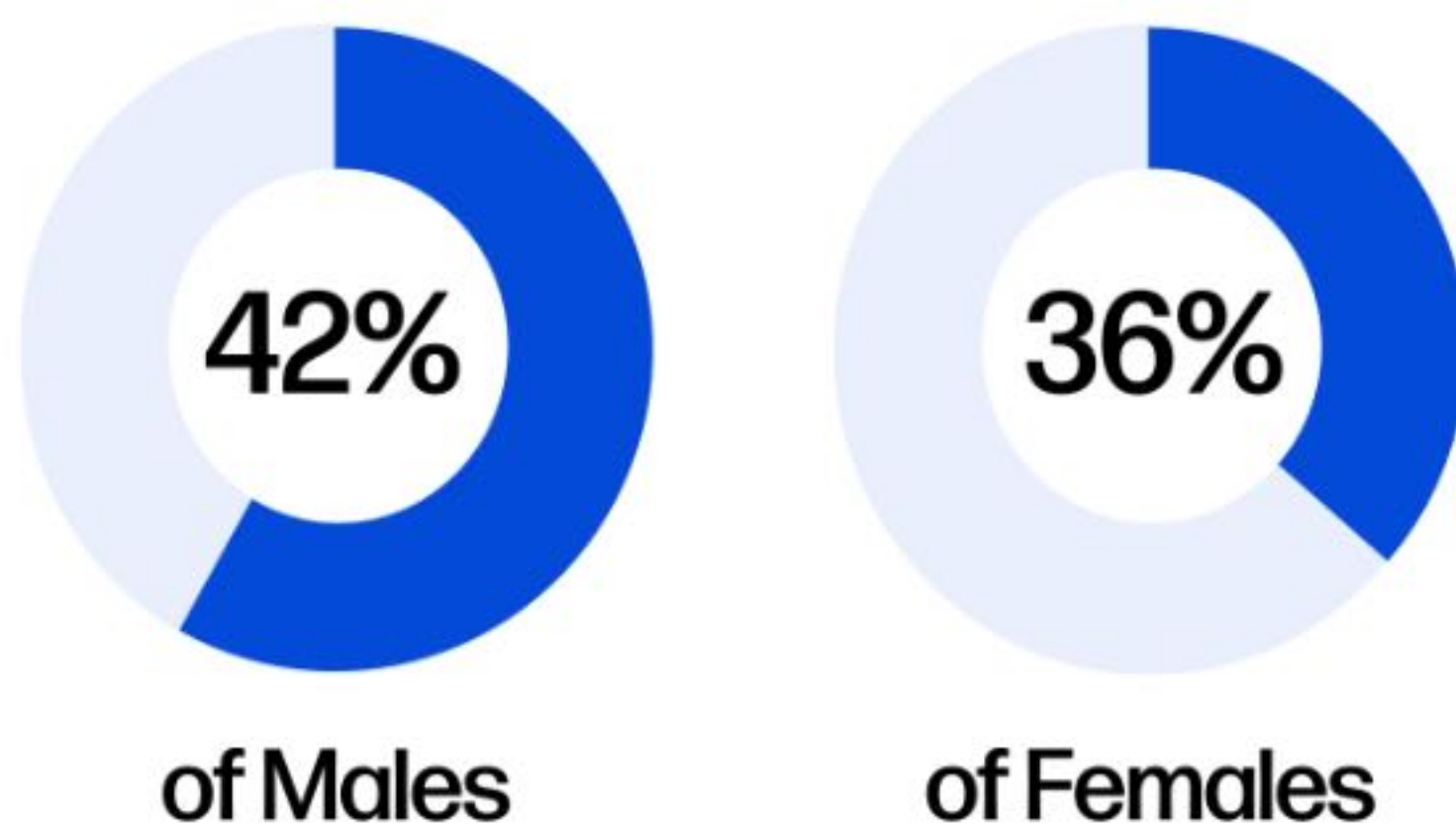
**4 in 5 Gen Z workers would give up some of their salary for more flexibility and autonomy at work.**

## Workers with a side hustle are more optimistic about their working life.

- WRI scores are 9% higher for those with side hustles than those without
- Their business is more likely to have performed well over the past 12 months
- Tend to agree that work is an important part of who they are
- Feel more positive about elements of external disruption (cost of living, country's prospects, job market) and more optimistic for the future

## Profiling those with side hustles

% with side hustle (e.g., freelancing, entrepreneurship, etc.)

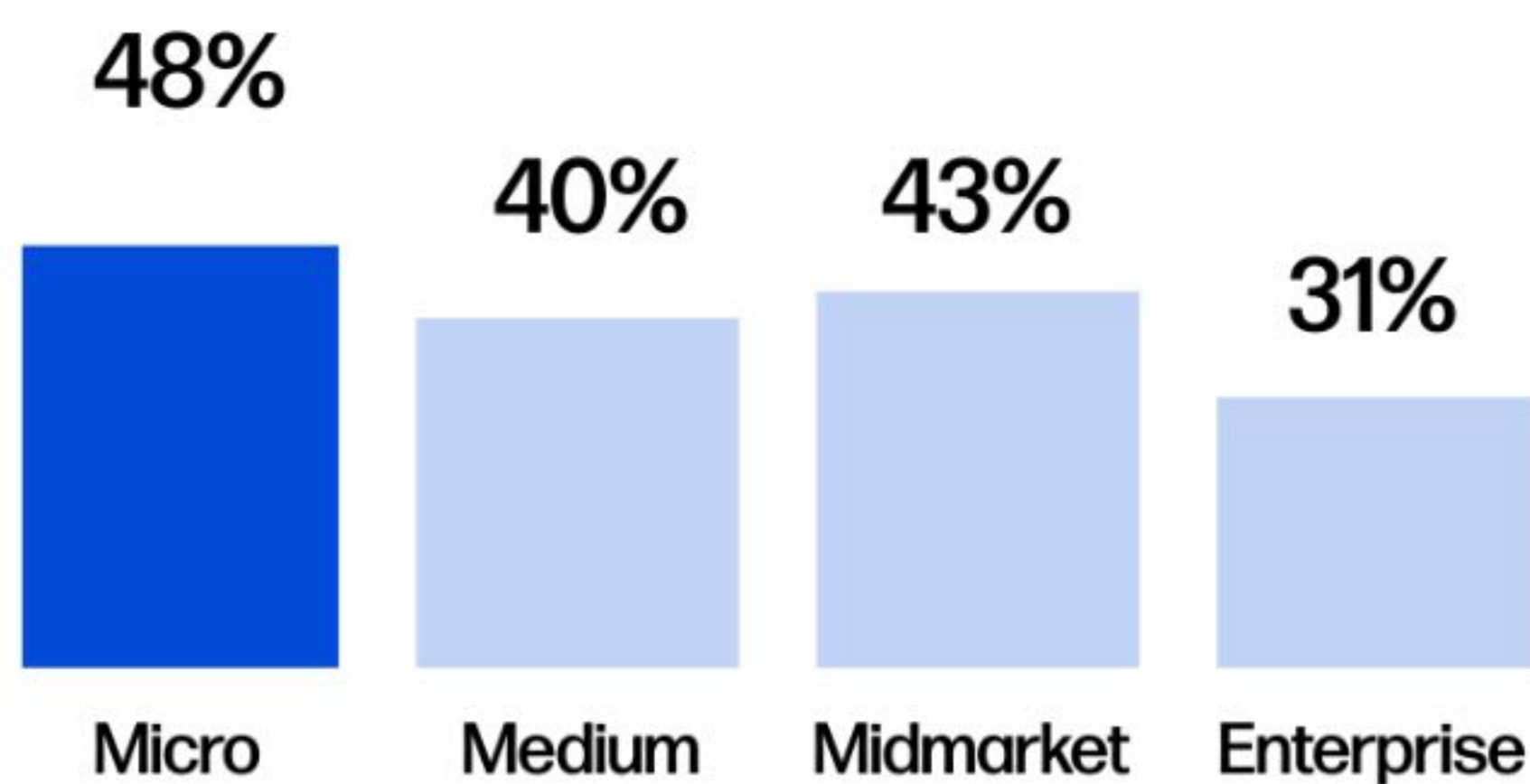


### Working in...

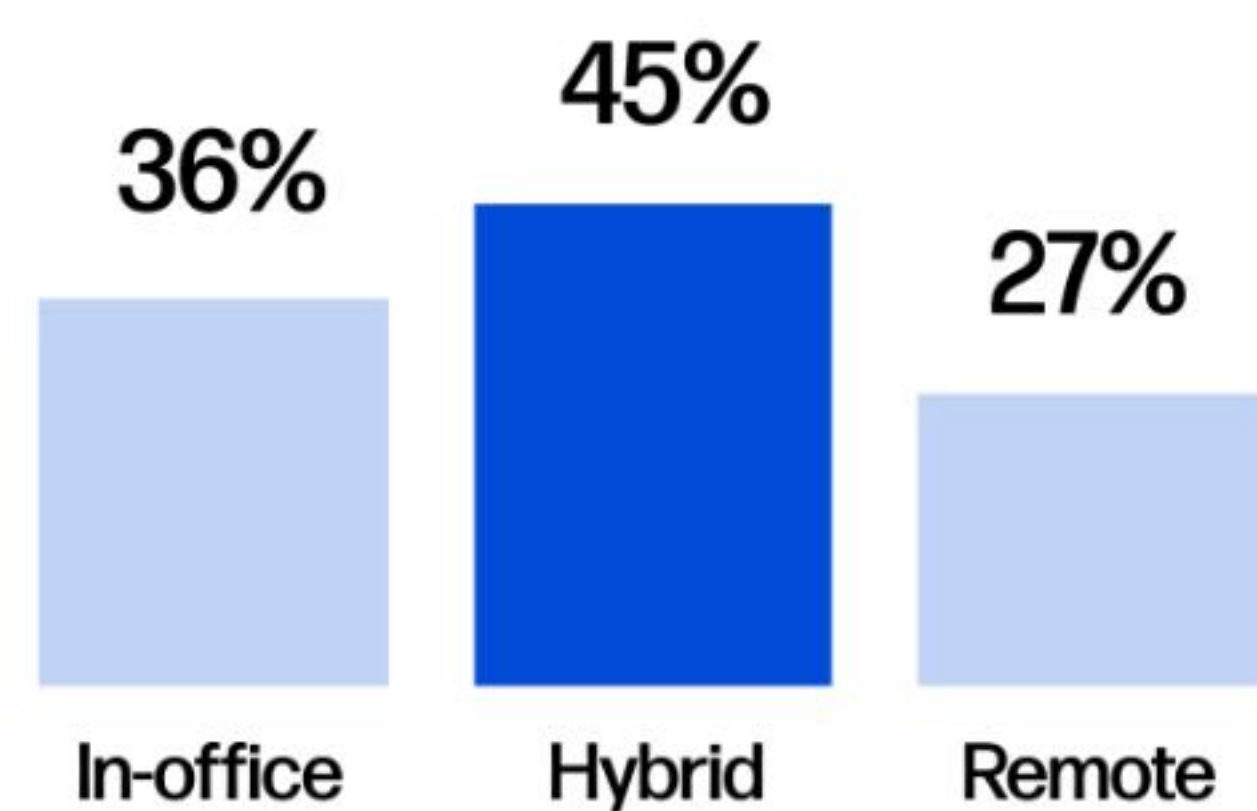


## Most likely in micro companies

(least likely in enterprises)



## Often working in hybrid job roles



# Is your business ready to embrace the future of work?

## Global disruption is inevitable

But by focusing on the 85% of factors that businesses can influence, we can control and improve the Future of Work.

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### 1 Model leadership and provide tools and tech to empower the workforce.

Leading with EQ and people centricity can close the gap between fulfilled and non-fulfilled workers, particularly when combined with the right tools.

### 2 Include ITDMs at the center of employee experience.

Ensure IT departments are included and enabled to help solve fulfillment gaps in your business.

### 3 Utilize DEX solutions to measure and optimize the digital employee experience.

Accurate measurement will reduce gaps between IT's perceived and actual difference to employee fulfillment at work.

### 4 Democratize tech and AI across the organization.

Daily use of work-specific AI tools is a force multiplier to employee fulfillment. Knowledge workers need access and continuous upskilling for businesses to truly benefit.

### 5 Reimagine work experiences for future generations.

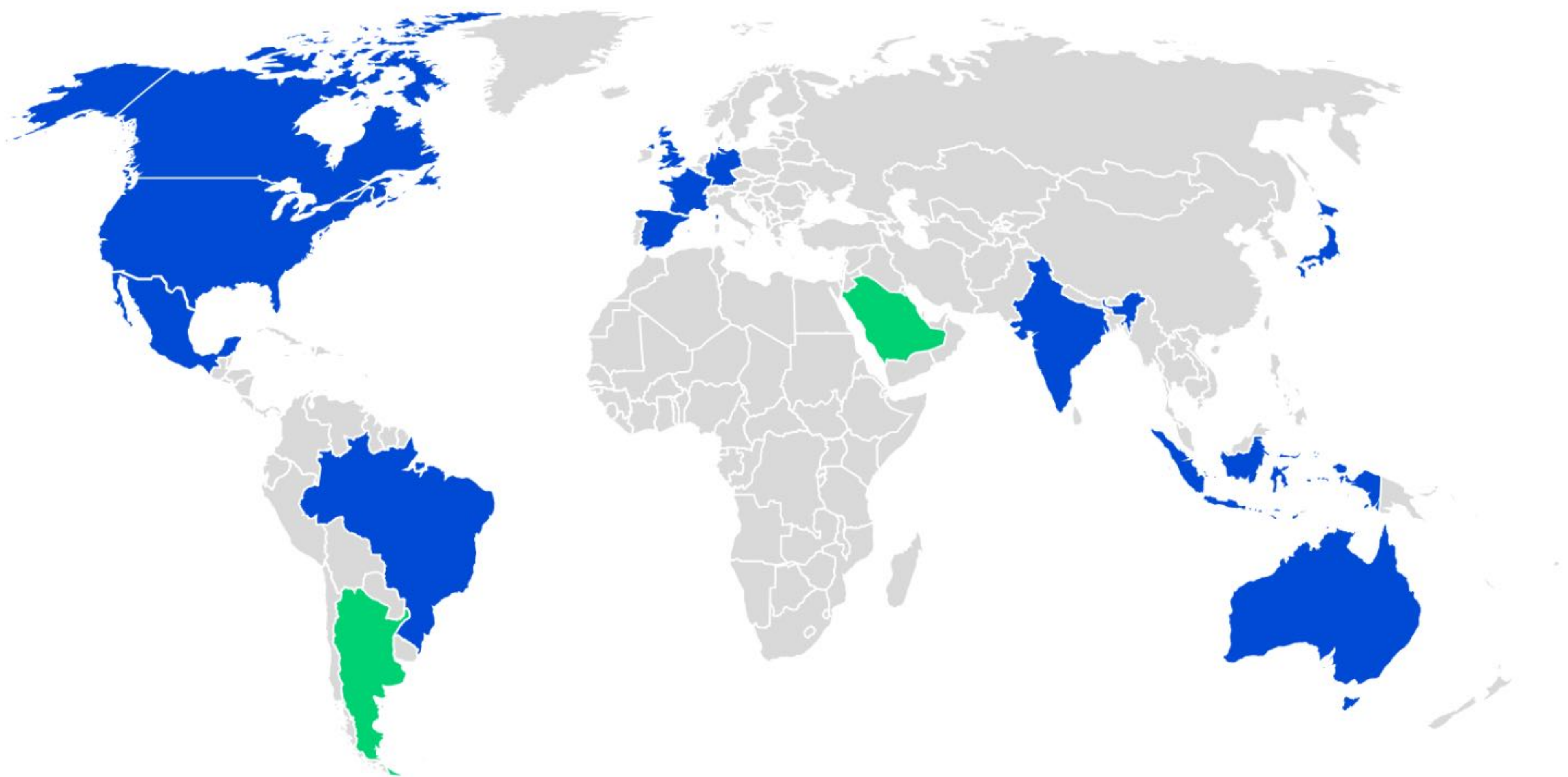
Incorporate the work expectations of Gen Z to attract and retain the best younger talent.

# Methodology

For the third consecutive year, HP has led a global study on the world's relationship with work across three audience groups, in 14 countries.

Our approach: 25-minute online survey  
Speaking to: 18,200 desk-based workers

- Knowledge workers: n=14,000 (1,000/country)
- IT decision makers: n=2,800 (200/country)
- Business leaders: n=1,400 (100/country)



## Americas

USA  
Canada  
Mexico  
Brazil  
Argentina (New)

## EMEA

UK  
France  
Germany  
Spain  
Saudi Arabia (New)

## APAC

Australia  
Japan  
India  
Indonesia

Note: YoY% change data is based on the original 2 countries only and excludes Argentina and Saudi Arabia, which are net new in 2025.

