

Today at Work



People are working less

Robust job growth over the past two years has obscured a less-obvious trend in the labor market. More people are working, but they're putting in fewer hours.

Also in this issue

Employee engagement hit a record high in 2023

How the law of supply and demand has failed teachers

Stress at work: It's not just about the job

Play our new business card bracket

OUR MISSION

The ADP Research Institute's mission is to make the future of work more productive through data-driven discovery. Companies, workers, and policymakers rely on our fine-tuned data and unique perspective to make informed decisions that impact workplaces around the world.

ABOUT TODAY AT WORK

Today at Work, released quarterly, is built on a foundation of ADP payroll data representing more than 25 million U.S. workers and nearly a decade of ongoing surveys that have reached nearly 550,000 workers in 29 countries. Combined, these data sets provide a recurring, people-centered, and comprehensive view of the world of work.

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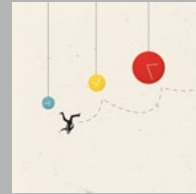


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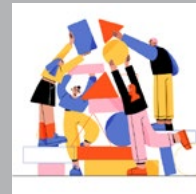
IN THIS ISSUE



People are working less

Upbeat headlines about the labor market have obscured a less-obvious trend.

Page 4



Employee engagement is up

Employee engagement hit a new high, but there are big variations based on geography.

Page 10



How the law of supply and demand is failing teachers

Demand for educators is up, but wages are losing ground.

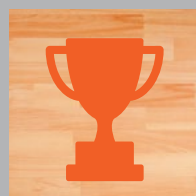
Page 14



Workplace stress: It's complicated

We dig deeper into the implications of good stress and bad stress.

Page 16



Play the business card bracket

College teams got you down this year? Take a shot at our new bracket.

Page 22

LETTER FROM NELA

Under the hood of the global job market

By all outward appearances, the U.S. labor market is chugging along. Job gains in the first quarter of the year are solid, and unemployment is low.

A peek under the hood, however, reveals a dynamic and evolving market. The imprint of the pandemic is still being felt by workers in ways big and small.

In this issue of *Today at Work*, Liv Wang's cover story shows that hourly workers are putting in less time on the job than they did before the pandemic. What's even more interesting is who is driving this trend – small business employees, women, young adults, and high earners all are working less.

It's not apparent whether this decline in hours worked is the result of companies cutting hours or employees choosing to work less. What is clear is that the combination of rapid post-pandemic pay growth and the widespread availability of flexible, hybrid, and remote work arrangements has given employers and employees the opportunity to explore flexible time schedules, which can affect average hours spent on the job each week.

With a shrinking work week, employer efforts to engage workers and manage job-related stress can take on greater importance. In this issue, Mary Hayes and Jared Northup take a data journey to measure employee engagement and stress at work in 28 countries on six continents. They find that worker engagement is at a record high globally and offer perspectives on how to keep it that way while managing burnout.

One demanding and often stressful occupation that we highlight in this issue is teaching. With demand for teachers still soaring since the

pandemic, Jeff Nezaj shows that teacher salaries aren't making the grade. Pay growth for educators lags growth for the workforce as a whole, and the gap is widening.

Lastly, I'm a native Hoosier, which means college basketball is near and dear to my heart. For those of you who, like me, can't get enough of college basketball, try your hand at this issue's Business Card Bracket. When you're done, check out the 2023 job title winners at [ADPRI.org](#).

Dr. Nela Richardson

Chief economist and ESG officer,
Head of the ADP Research Institute



People are working less

Who—and why?

When analysts and policymakers check the health of the labor market, unemployment and job creation typically dominate the conversation. By that measure, things are going well. U.S. unemployment was 3.9 percent in February 2024 and the economy added an average of 197,000 non-farm private jobs a month in 2023, according to government data.

Those upbeat headlines, however, have obscured a less-obvious trend. Yes, more people are working. But hourly workers as a group are putting in less time than they did just a few years ago. Between December 2019 and December 2023, the median number of hours worked fell from 38.4 to 37.7 a week.



LIV WANG
LEAD DATA SCIENTIST
ADP RESEARCH INSTITUTE

MEASURING HOURS WORKED

The ADP Research Institute examined the aggregated, anonymized payroll records of private, hourly, non-farm workers, paying close attention to people who were paid weekly or bi-weekly. We isolated discrete employee-employer pairs to identify and track about 13 million individual jobs each month.

Looking at our sample from October 2019 to December 2023, we measured average weekly hours worked within a given month for each job, then calculated the median of those observations.

Why are hours worked important? Labor inputs to the economy rely not only on the number of people employed, but how much time those people devote to their jobs.

The pandemic affected the labor market in ways small and large, including hours worked. Opportunities in the gig economy offered workers the promise of flexibility. Historically high post-pandemic pay gains in some sectors gave people the opportunity to put in fewer hours without sacrificing income.

Employers, too, made changes. Some companies choose to cut hours rather than reduce employee headcount, for example. Regulations governing overtime pay and employee benefits can factor into these decisions.

In short, the labor market has changed in ways that can't be told by the unemployment rate alone.

The shrinking workweek

While the post-pandemic job recovery was strong, it was accompanied by a rise in part-time labor and a decline in median hours worked.

DECEMBER 2019

43%



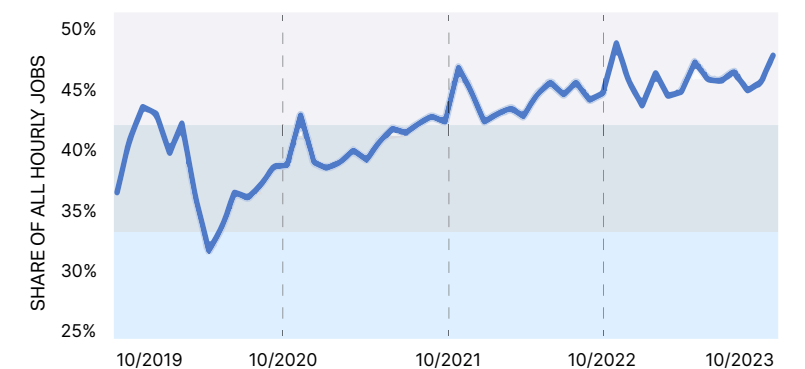
DECEMBER 2023

47%

Part-time jobs as a share of all hourly jobs

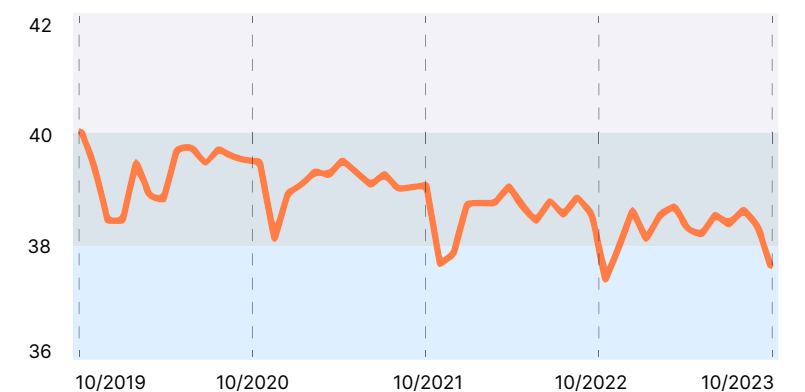
PART-TIME JOBS

< 35 HOURS WEEKLY

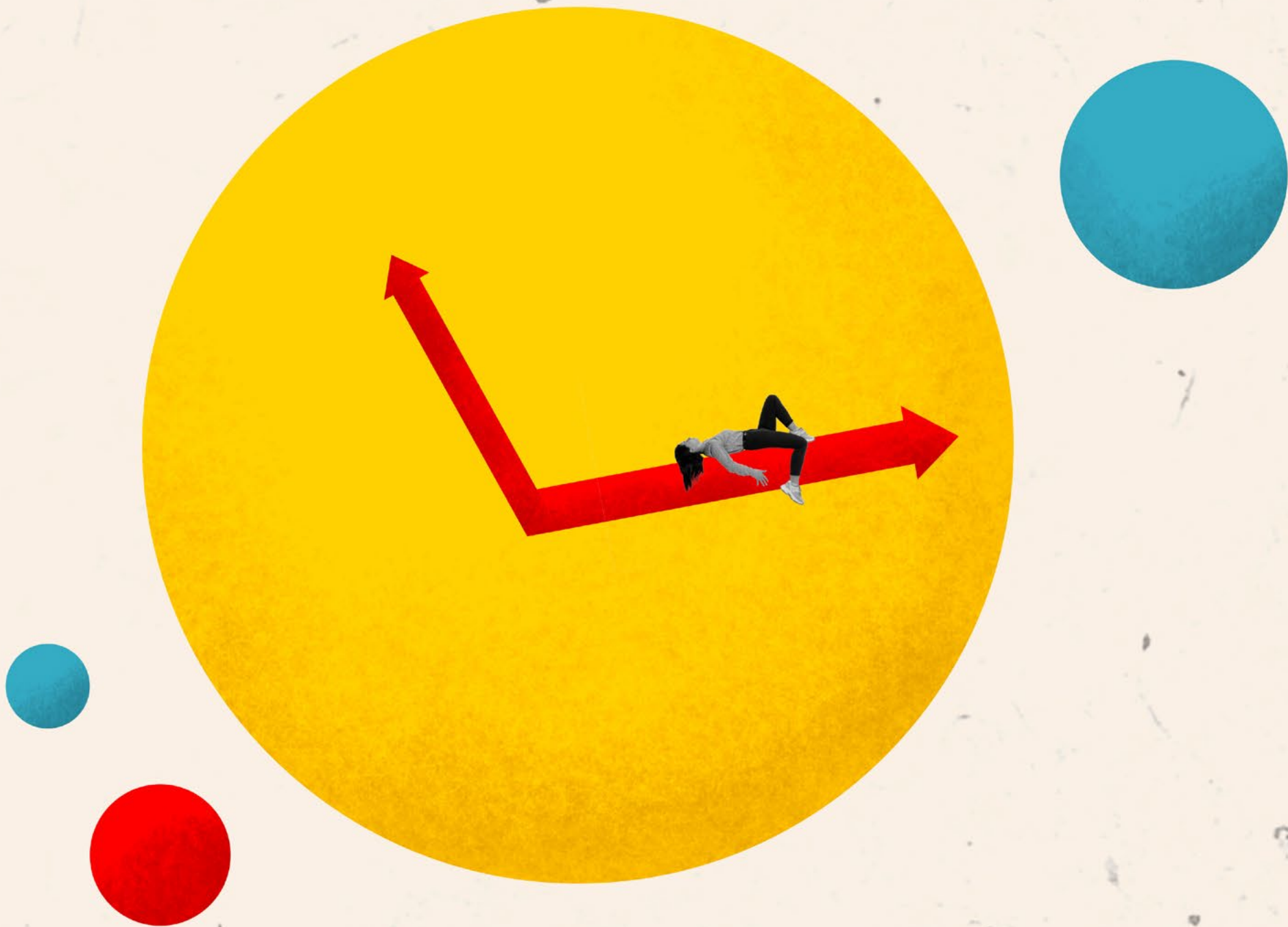


Source: ADPRI Research Institute

MEDIAN HOURS WORKED



Source: ADPRI Research Institute



The story of how the labor market has changed can't be told by the unemployment rate alone.

6.9%

Average year-over-year pay increase for job-stayers in 2022 and 2023

13.4%

Average year-over-year pay increase for job-changers in 2022 and 2023

56%

Women accounted for 56 percent of all part-time hourly jobs in December 2023

5.4h

The hours-worked gender gap has widened from 4.4 to 5.4 hours a week since 2020

Who is working less?

The people driving this four-year decline in hours worked fall into four main groups: Women, young adults, highly paid workers, and employees at small businesses.

Adults 35 and younger are working an hour less than they did four years ago, while hours worked by older age groups held steady.

Employees at small companies have typically put in fewer hours each week than their counterparts at large companies, but they, too, are working less than they used to.

Education and health services and leisure and hospitality were among the sectors most affected by the pandemic. Neither has recovered fully from pandemic job cuts, and both currently face labor shortages. Yet people in these industries are working less, too.

Even white-collar jobs haven't been immune to a reduction in median hours worked. A burst of information industry hiring during the pandemic was followed by layoffs at large technology companies, leading to a 10 percent reduction in hours worked between October 2019 and October 2023, one of the biggest declines of any industry.

If workers insist on putting in fewer hours, or if their organizations force cuts, it could be another drag on the employment recovery.

MEDIAN WEEKLY HOURS WORKED

	2023			Change from 2019		
	Oct	Nov	Dec	Oct	Nov	Dec
Gender						
Female	35.7	35.4	34.5	-1.8	-1.5	-1.1
Male	40.0	40.0	39.9	0.0	0.0	-0.1
Age group						
16-24	25.8	25.6	25.2	-1.9	-0.8	-1.0
25-34	38.8	38.5	38.0	-1.3	-0.9	-0.7
35-54	40.0	40.0	40.0	0.0	0.0	0.0
55-85	40.0	40.0	39.6	0.0	0.0	-0.3
Company size						
1-19 employees	32.0	32.0	30.7	-2.2	-1.5	-1.1
20-49	34.1	34.1	32.1	-3.9	-3.2	-3.1
50-249	39.5	39.2	38.4	-0.5	-0.8	-0.8
250-499	40.0	40.0	40.0	0.0	0.0	0.1
500+	39.9	39.7	39.6	-0.1	-0.1	0.1
Industry						
Construction	40.0	40.0	39.6	0.0	0.0	0.3
Education/Health Serv	36.0	35.8	35.0	-1.5	-1.4	-1.0
Financial activities	40.0	40.0	40.0	0.0	0.0	0.0
Information	35.0	35.0	35.5	-3.9	-3.3	-0.6
Leisure + hospitality	25.8	25.8	25.2	-3.2	-1.9	-1.9
Manufacturing	41.5	41.4	41.4	-0.5	-0.8	-0.6
Natural resources/mining	43.6	43.4	42.6	-2.3	-3.2	-3.0
Other services	34.5	34.2	32.6	-1.6	-1.1	-1.7
Prof. + business services	38.8	38.5	37.5	-1.3	-1.0	-0.3
Trade/transpo/utilities	38.9	38.6	38.3	-0.7	-0.1	0.1

Source: ADP Research Institute

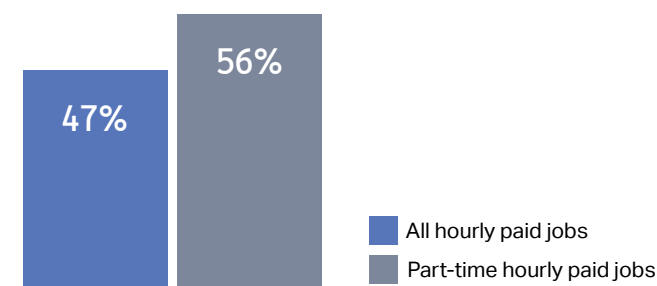
THE REIGN OF THE FEMALE PART-TIMER

While women accounted for 47 percent of all hourly workers in December 2023, they made up more than half of all part-time hourly workers.

Now females who are paid by the hour are putting in more than an hour less per week than they did in 2019. Time worked by male hourly workers, in contrast, is little changed at about 40 hours a week.

Over the past four years, the hours-worked gender gap has widened from 4.4 to 5.4 hours a week.

PERCENTAGE OF FEMALE WORKERS



Source: ADP Research Institute

High earners are cutting back

As the economy roared back after the pandemic, job-stayers were able to command more than 5 percent annual pay increases in 2022 and 2023, ADP payroll data shows.

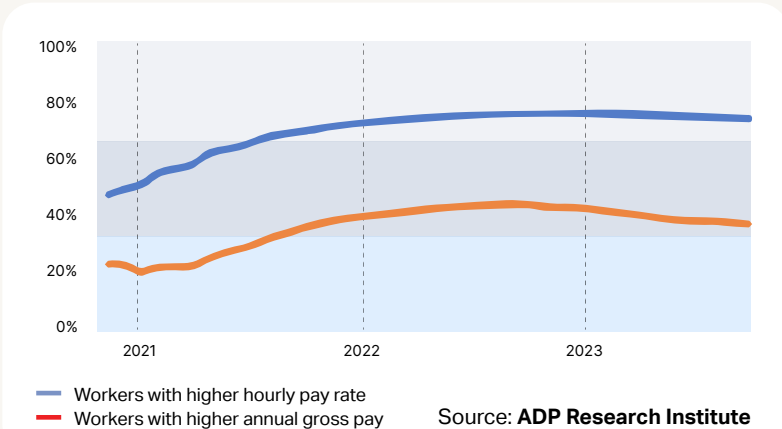
For people who changed jobs, the numbers were even higher. In June 2022, job-switchers recorded a 16.4 percent pay gain, according to ADP data. This historic jump helped offset the effects of the reduced hours that followed.

Between June and December 2023, the highest quartile earners put in fewer hours every month than they had worked the year prior. The lowest earners continued to add hours despite big post-pandemic pay increases. But that growth in hours slowed after pay gains peaked in mid-2022.

In other words, while wages in general have risen, most of the people who worked fewer hours were higher wage earners whose pay increases helped offset the effects of reduced hours on annual earnings. In 2022, annual pay for more than half of these workers was higher, even though they worked fewer hours.

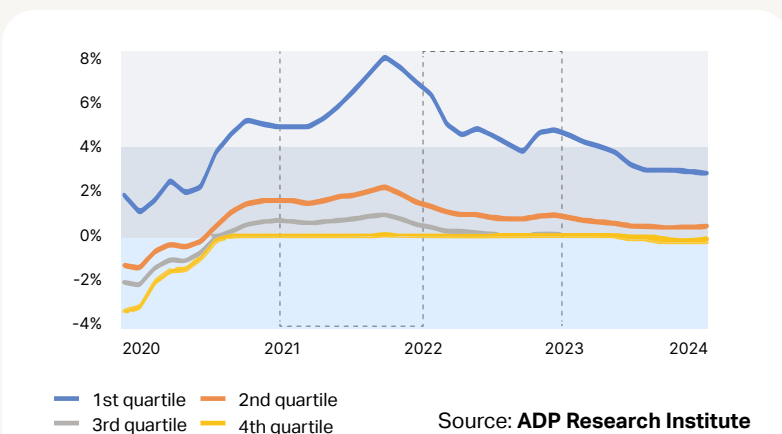
While earners with the highest annual gross pay—those in the fourth quartile making a median of about \$79,500 a year—are working fewer hours than they did a year ago, workers in the first and second quartile—with median pay of about \$16,100 and \$35,400, respectively—are putting in more.

MOST PEOPLE WORKING FEWER HOURS ARE HIGHER EARNERS



Source: ADP Research Institute

MEDIAN YOY CHANGE IN ANNUAL HOURS WORKED BY ANNUAL GROSS PAY



Source: ADP Research Institute

DATA POINT

The ADP Research Institute tracks the anonymized data of individuals working the same job over a 12-month period to identify their year-over-year change in annual total hours, annual gross pay, and annual average hourly pay. If a job is paid only part of the year, an annual equivalent is estimated. This matched sample yields more than 7 million hourly paid job-stayers each month.

OUR TAKEAWAY

The pandemic impact on individual hours worked varies across demographic groups, wage level, company size, and industry. Personal choice, company policy, regulation, economic conditions, and productivity also can influence the time people spend on the job. If workers demand a shorter week, employers might want to consider ways to improve employee engagement or how a job is designed.



Employee engagement is up

Hybrid work—
and teamwork—
deserve the credit

Engagement. It's an important metric for employers and their employees, that emotional state of mind that prompts people to do their best work and sustain that elevated level of performance.

That's why the ADP Research Institute has been tracking worker engagement across the globe since 2015. In 2023 alone, we surveyed more than 28,000 people in 28 countries on six continents, expanding our reach both within organizations and globally.

Our latest survey shows worker engagement on the rise. But we found big variations based on geography, remote work, and levels of teamwork.



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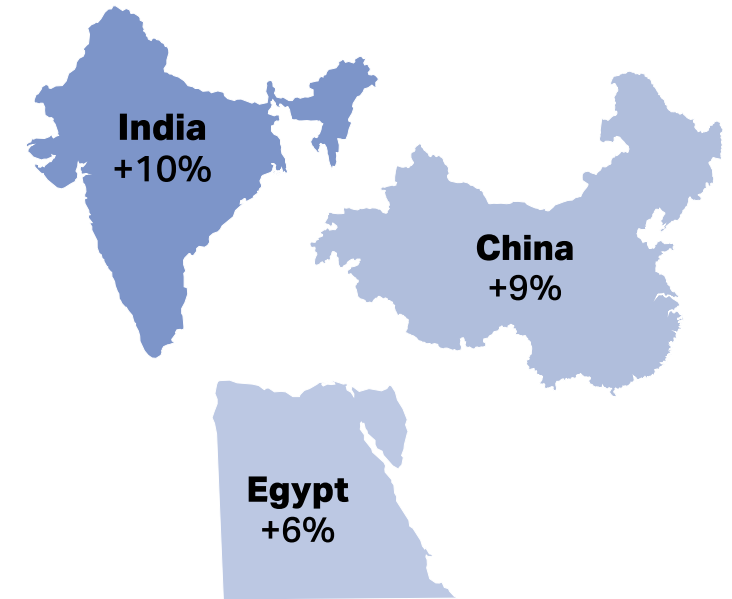
Location matters

The pandemic ushered in the world's lowest level of employee engagement since our data began. In 2020, only 14 percent of workers said that they were fully engaged.

Since then, worker engagement has ticked upward, reaching a record high of 18 percent in 2023.

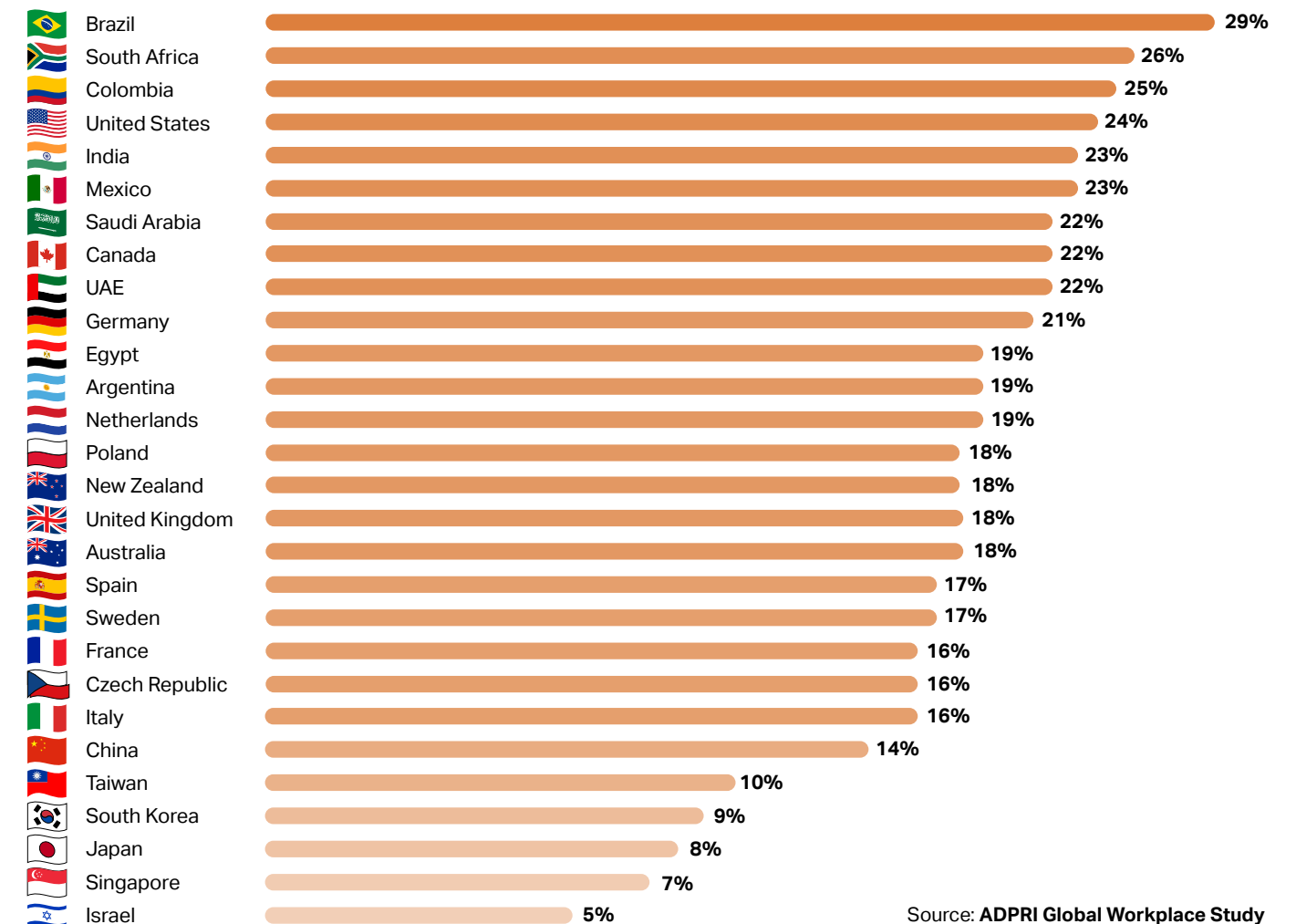
We believe this signals an enduring change in the global workforce. Last year's return to a post-pandemic normalcy, coupled with an improved global economy and an acceptance of hybrid work, might have boosted employee engagement.

While engagement improved at the global level, however, the situation looks quite different country by country. Economic, political, and social factors can have significant influence on employees and their work. From geopolitical issues to rapidly changing economic conditions, each country's unique experiences affect individuals differently.



WORKER ENGAGEMENT
BIGGEST YEAR-OVER-YEAR INCREASE
Source: ADPRI Global Workplace Study

FULLY ENGAGED BY COUNTRY 2023 SHARE OF RESPONDENTS



Source: ADPRI Global Workplace Study

The power of hybrid work

1.9x

Hybrid workers are 1.9 times more likely to be fully engaged than remote workers

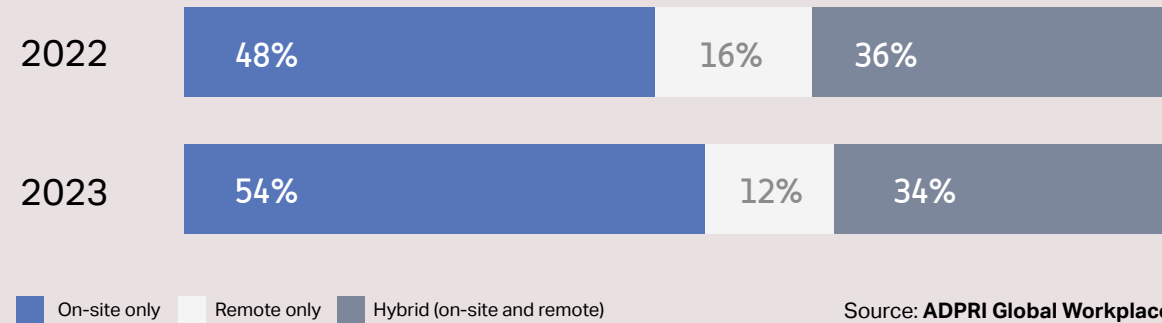
Hybrid work took the world by storm in recent years, but now on-site work is making a comeback. In the past year, the share of on-site workers grew by 6 percent as more organizations told their employees to show up in person.

In 2023, for the first time since the pandemic, more than half of workers we surveyed globally were on site, a gain that came largely at the expense of remote-only work.

This shift is important, because when it comes to employee engagement, work location matters.

Hybrid workers are 1.7 times more likely to be fully engaged than on-site workers, and 1.9 times more likely to be fully engaged than people who do their jobs remotely.

WHERE PEOPLE WORK GLOBALLY



Source: ADPRI Global Workplace Study

The importance of teams

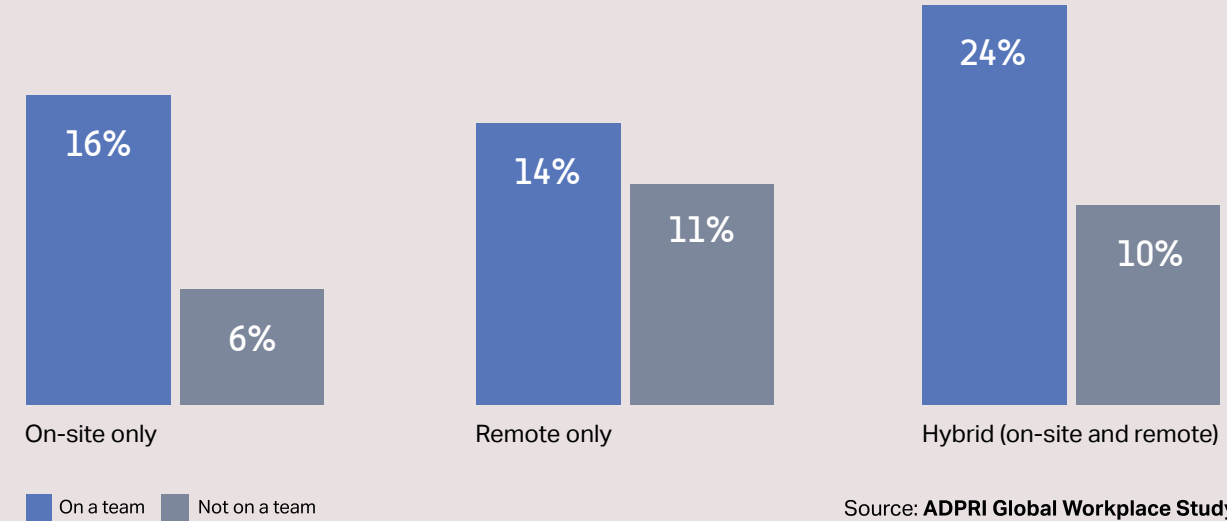
3x

On-site workers who are part of a team are 3 times more likely to be highly engaged

Regardless of where people get their work done, they're significantly more likely to be engaged on the job when they're part of a team. And that's good, because about 93 percent of our global respondents say they're part of one.

The teamwork difference is particularly dramatic for on-site and hybrid workers. On-site workers who are part of a team are 3 times more likely to be highly engaged; hybrid workers on teams are 2.8 times more likely to be highly engaged.

ENGAGEMENT BY WORK LOCATION



Source: ADPRI Global Workplace Study



Insights in action

Work traditionally has been conducted largely on site, with managers literally watching their employees while they labor. That started to change with the rise of the knowledge economy. Then came the pandemic, which decisively upended longstanding norms. Now, organizations face a dilemma: How to foster engagement whether employees work from home, show up in person or alternate between the two.

Modern working arrangements require a transition to an era of trust in order to support and nurture employee engagement. Here are ways employers can leverage hybrid work to ensure they're meeting the needs of both employees and the organization.

Focus on the work itself. What tasks can be accomplished remotely, and what needs to be done on site? Hybrid work policies should focus on the tasks that need doing instead of who is doing that work.

Start with trust. A little trust can go a long way. Instead of monitoring daily work, try monitoring longer-term performance and outcomes. Don't make decisions based on individual employee performance concerns that affect the entire workforce.

Experiment. Every organization does things differently. What works for others might not work for yours.

HOW THE LAW OF SUPPLY AND DEMAND IS FAILING TEACHERS



JEFF NEZA
PRINCIPAL DATA SCIENTIST
ADP RESEARCH INSTITUTE

A TALE OF TWO CITIES

Plotting the ratio of teacher salary to the salary of all U.S. workers—what we call the Competitive Salary Index—clearly shows that teacher salaries are becoming less competitive and growing more slowly than average wages for all employees.

Stagnating wages have led to recruitment woes as would-be educators opt for jobs in higher-paying industries even as tenured educators quit the classroom in greater numbers.

In the five-year period spanning 2018 to 2023, salary competitiveness eroded particularly for younger teachers, those aged 20 to 30. This is a worrisome development, one that has the potential to create or exacerbate labor shortages by discouraging potential teachers from joining the profession. The Competitive Salary Index has remained steady for all other age groups, indicating that teacher pay for these groups has held its competitive advantage.

When we applied the Competitive Salary Index to certain large combined statistical areas, the Orlando-Deltona-Daytona Beach area showed the biggest decline, with the teacher wage premium falling from 28 percent to 4 percent over the last five years.

The Washington-Baltimore-Arlington region had the largest pay premium gain. Teachers there earned only 89 percent of a typical U.S. worker in 2018, but their pay jumped to 106 percent of the average in 2023.

OUR TAKEAWAY

The takeaway for employers is that recent wage increases in the overall labor market have made it harder to recruit and retain teachers since the pandemic. Non-monetary amenities such as professional training, flexible work arrangements, and job sharing could help employers stay competitive.

The United States long has struggled with a teacher shortage, a problem that worsened during and after the pandemic.

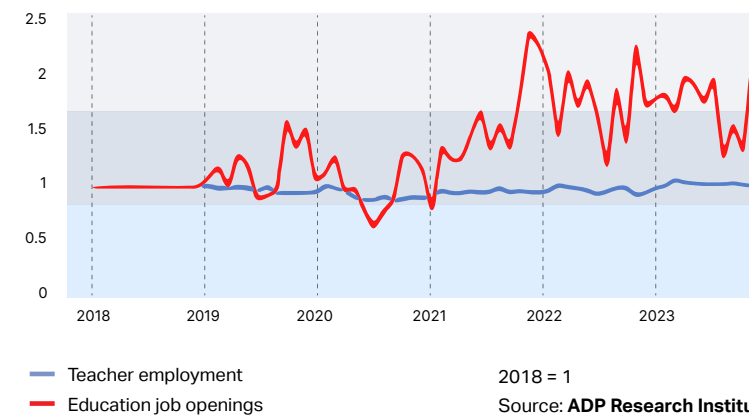
Today, classroom professionals are in high demand and short supply. It's a classic economic imbalance that should lead to higher prices—in this case, higher wages. Instead, teacher pay has lagged that of other U.S. workers.

Something isn't right, and the ramifications are clear.

Stagnant wages and a stressful work environment are pushing classroom experts to the exits and discouraging young people from joining the profession.

SUPPLY IS LAGGING DEMAND

EMPLOYMENT vs JOB OPENINGS

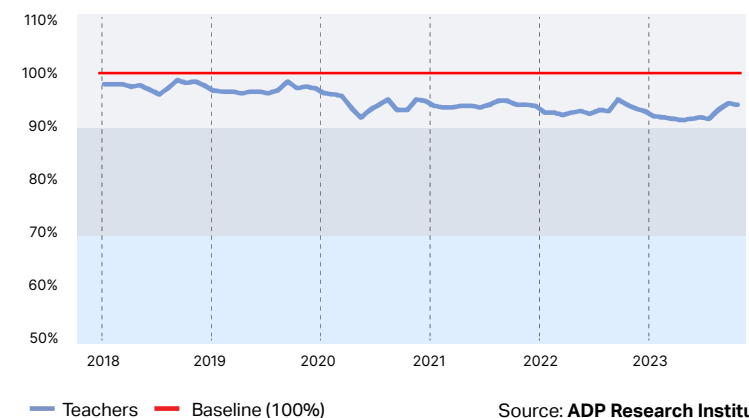


Using employment and wage data for public and private kindergarten through 12th-grade teachers, the ADP Research Institute built indexes to track employment trends. We found that openings for educators have increased dramatically since 2021 while employment levels remained relatively flat. Teacher employment fell even in the months following the pandemic outbreak as communities lost educators to retirement and resignations.

While demand for teachers fluctuates significantly according to the time of year, supply doesn't show the same seasonal pattern, a dynamic that could further exacerbate teacher shortages.

TEACHERS ARE LOSING GROUND ON PAY

COMPETITIVE SALARY INDEX



As of October 2023, teachers were earning an average of \$68,000 a year, 8 percent less than the average for all U.S. workers, a pay gap that's been widening—it was only 3 percent in January 2018.

And this comparison between teachers and the broader U.S. workforce doesn't consider differences such as education level, which is higher among teachers, making the shrinking pay premium even more unsettling.



INSIGHTS IN ACTION

Fewer teachers means higher student-teacher ratios, which in turn can lead to increased stress, increased burnout, and eventually higher turnover for faculty.

Even if you're not part of the education field, you should be concerned about the shortage of teachers and the ground they're losing on pay.

It might seem as though there's little that organizations can do, but employers can take actions to ensure that the next generation of employees enters the workforce with the benefit of a strong classroom experience.



Support schools and teachers through monetary donations to local institutions and foundations.



Find ways to share your employee and organizational expertise with schools in your communities.



Provide employees with paid volunteer hours to help at schools.





People who experience work pressure as eustress rather than distress thrive.

Workplace stress: It's complicated

Geography, job level, and other factors can have a big difference in how people experience stress on the job.

When the ADP Research Institute began studying stress in the workplace in 2022, we began by asking whether stress always has a negative connotation, or whether it could be both positive and negative.

In the [December issue of *Today at Work*](#), we explained the difficulty of measuring stress given the complex and unique ways that individuals respond to it. Stress can inspire some people to deliver their best work while causing others to shut down.

Most workers fall in the middle. They experience stress and might not particularly like it, but they cope, perhaps at somewhat lower levels of productivity than they might achieve otherwise. It's the employees on either side of that middle who bear watching.

In this issue, we go deeper into the data on good stress (eustress) and bad (distress). As we've shown, people

who experience work pressure as eustress rather than distress thrive. They're more engaged, more resilient, and less likely to quit their jobs.

Overloaded employees, not surprisingly, experience pressure much more negatively and score lower in every category of worker well-being that we measure.

But our data also shows that geography, job level, and other factors can have a big difference in how people experience stress on the job.



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Cultural differences play a part

When workers across the world weigh in on their stress levels, they reveal big differences by country.

In China, more than half of respondents report that they are thriving at work, and only 7 percent report feeling overloaded. Brazil was a close second, with 49 percent of workers thriving. Egypt had the smallest share of overloaded workers, at 4 percent.

Compare this to Taiwan, the United Kingdom, and South Korea, where significantly more workers say they're overloaded.

The United States, Canada, and New Zealand fall in the middle of the spectrum. In these countries, the share of thriving workers to overloaded workers is more evenly balanced.

STRESS: A GLOBAL VIEW

■ Thriving ■ Overloaded



Source: ADPRI Global Workplace Study

Insights in action

It's tempting to add more to employees' plates when workload increases. The challenge is to remember to remove it. Employees who can't return to a steady state can get overwhelmed. Burnout and mistrust can follow.

Create space for your team to respond to urgent work by redesigning redundant and inefficient processes. These can include mandated employee goal setting, long-winded trainings, and over-engineered employee development planning.

Reassess policies that are designed for outlier situations but require something of all employees. For example, individual development plans are helpful when an employee wants to develop complex skills. But if someone needs to learn a task, they and their manager shouldn't need to complete a multi-page form.

Give employees more agency. Individual contributors are directed when to work, what to work on, and how to do it. They also are the most likely to experience overload.

Even small steps can have a positive impact. Try giving employees the ability to take time off in smaller increments to attend to personal business. Offer flexible scheduling or allow more time off.

HOW WE DEFINE ENGAGEMENT AND RESILIENCY

Engagement is a positive emotional state of mind that causes people to do their best work, sustainably. Workplace resilience is the capacity of an individual to withstand, bounce back from, and work through challenging circumstances or events on the job.

ADPRI's [Engagement Pulse](#) allows us to calculate which employees are all-in. These workers are highly committed and willing to give their all to their team and organization. They're dedicated to the organization's purpose, certain in their definition of excellence, confident in the support of their teammates, and excited by the organization's future.

Our [Workplace Resilience](#) responses tell us which employees are highly resilient, who demonstrate agency and the ability to compartmentalize their work. These workers feel psychologically safe on the job and trust their leaders.

HOW WE MEASURE STRESS

The ADP Research Institute has been tracking worker sentiment since 2015 with an annual survey that currently reaches people in 28 countries on six continents.

We use a [stress scale](#) we developed in 2022, which collected information from more than 15,000 respondents. Using that data, we learned that there are relationships between how people engage with stress and how they behave on the job.

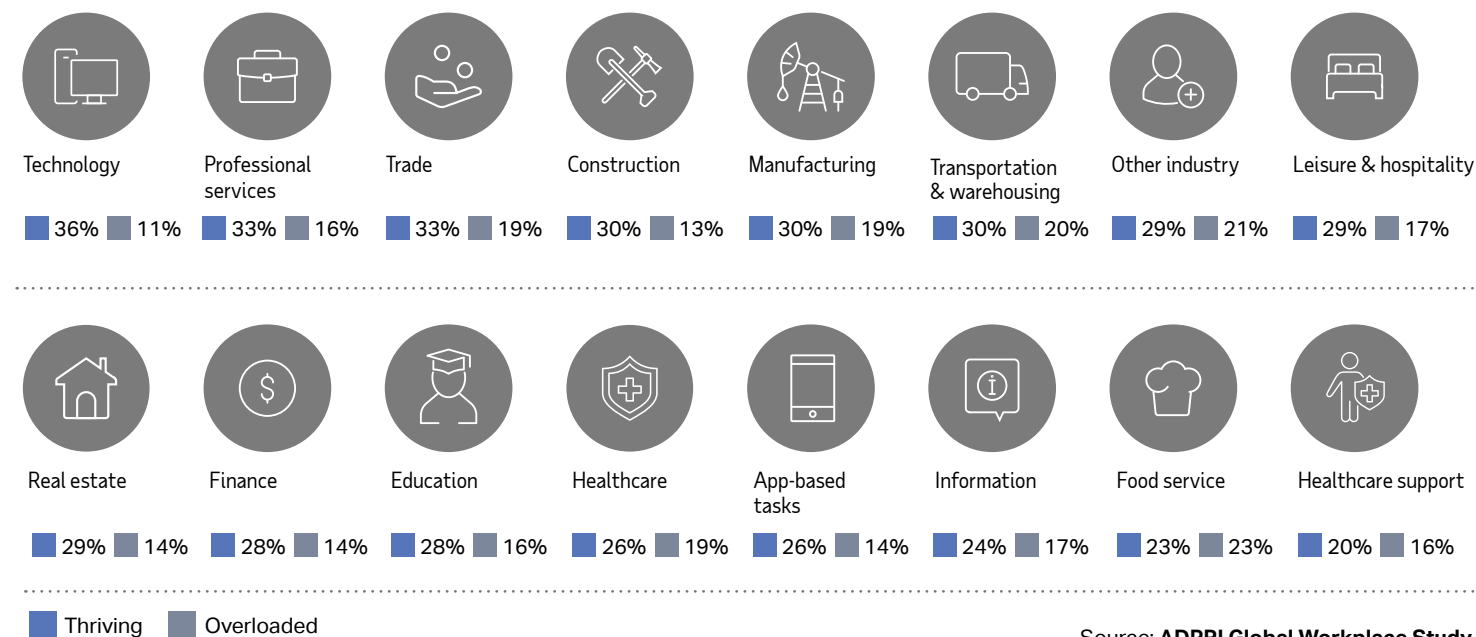
Once we established our three worker categories—the thriving, the rattled, and the overloaded—we applied the data to other measures of worker sentiment, such as engagement, resiliency, productivity, love of work, and intent to leave.



Different industries, different pain

Pressure on the job can motivate workers to step up to the challenge. But too much stress can have the opposite effect.

To illustrate this dynamic, look at how thriving and overloaded workers break down by industry. In technology, workers are 4.3 times more likely to be thriving than overloaded. Compare that to food service or health care support workers, who probably work longer hours for a lot less pay. They are just as likely to be overloaded as thriving.



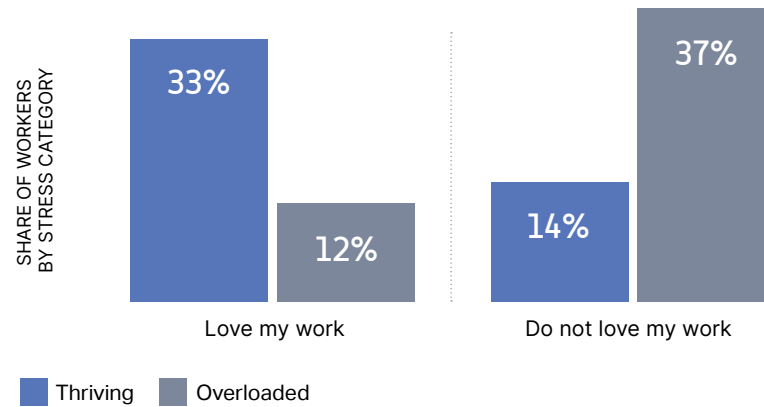
Source: ADPRI Global Workplace Study

What's love got to do with it?

A lot, as it turns out. There's a strong relationship between stress levels and loving the work you do.

Our survey asks people how they spend most of their time at work: Doing things they love, or doing things they don't love. Those who spend most of their time doing things they love are 3.2 times more likely to be thriving than those who spend most of their time doing things they don't love.

STRESS BY LOVE OF WORK



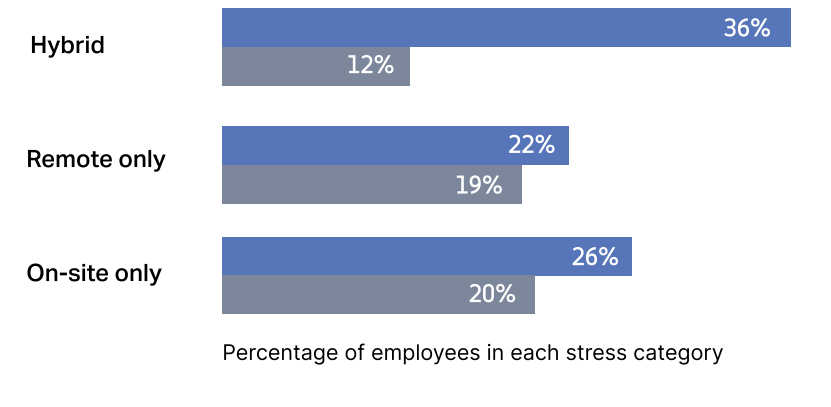
Source: ADPRI Global Workplace Study

Home can be an escape valve

People who spend part of their week working from home or other locations away from the office are 1.6 times more likely to be thriving than those whose jobs are fully on site. But they're twice as likely to be thriving as people who are fully remote.

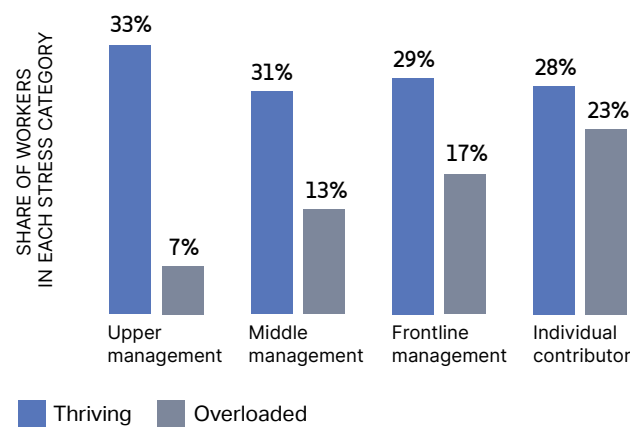
When it comes to coping with on-the-job stress, hybrid work can be a happy medium.

STRESS BY WORK LOCATION



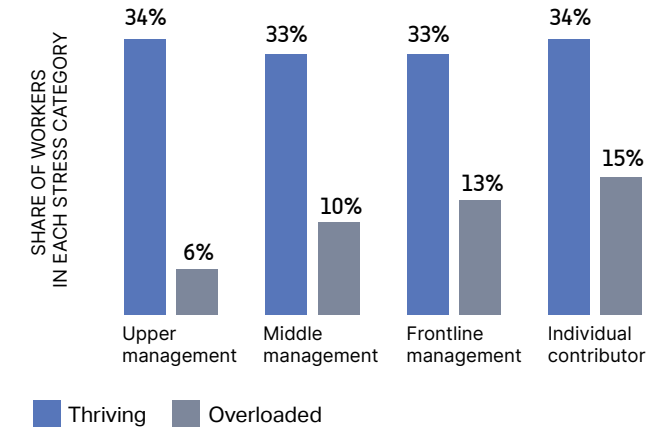
Source: ADPRI Global Workplace Study

STRESS BY LEVEL



Source: ADPRI Global Workplace Study

STRESS AND LOVE OF WORK BY LEVEL



Source: ADPRI Global Workplace Study

Less responsibility doesn't mean less stress

It's conventional wisdom that upper managers operate in high-stakes, high-pressure environments.

While that might be the case in some situations, our surveys show that people at the highest level of an organization are much less likely to feel overloaded than the employees they lead.

In fact, high-level executives are 4 times less likely to report feeling overloaded than workers who have no management responsibility, but who also might wield little or no power over their jobs or within their organization.

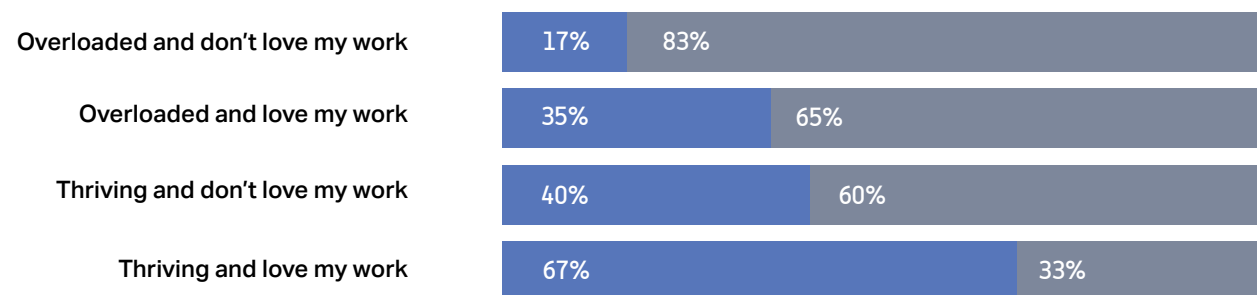
However, when you factor in a love connection, these differences become much less pronounced. In fact, the share of people who love their work and thrive is about the same across all organization levels.

And when we look at the percentage of time those people spent doing work they loved, there's even less variance, with all groups, regardless of rank, reporting more than 70 percent.

Looking to overloaded workers, however, upper managers trump individual contributors, with the former reporting that they spend 57 percent of their time at activities they love, compared to 38 percent for the latter.

And there's more. Love might also affect employee retention. Workers who feel they are thriving and mostly doing work that they love are nearly 10 times more likely to say they have no plans to leave their organization than overloaded colleagues who don't love their work.

STRESS, LOVE, AND INTENT TO LEAVE



Share of workers across all levels of organization

Source: ADPRI Global Workplace Study



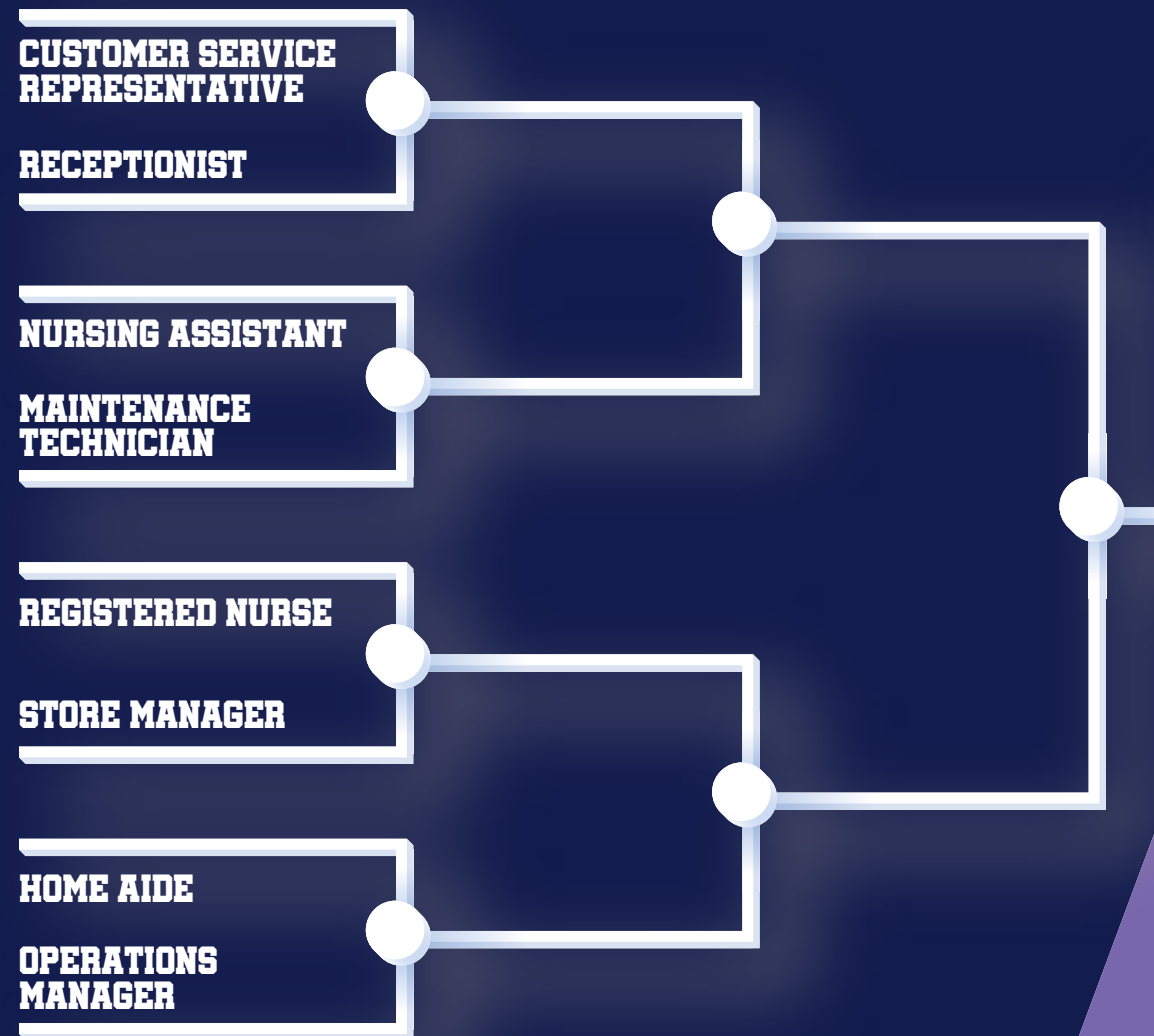
Our takeaway

Stress matters, not just for individuals, but for their employers. People who thrive in times of stress are 21 times more likely to be fully engaged on the job than their overloaded peers. They're also 20 times more likely to be highly resilient. Helping individuals decrease stress while finding opportunities to love their work could make an incredible difference in the success of an organization and the well-being of employees.

DEPARTMENT OF FUN & GAMES

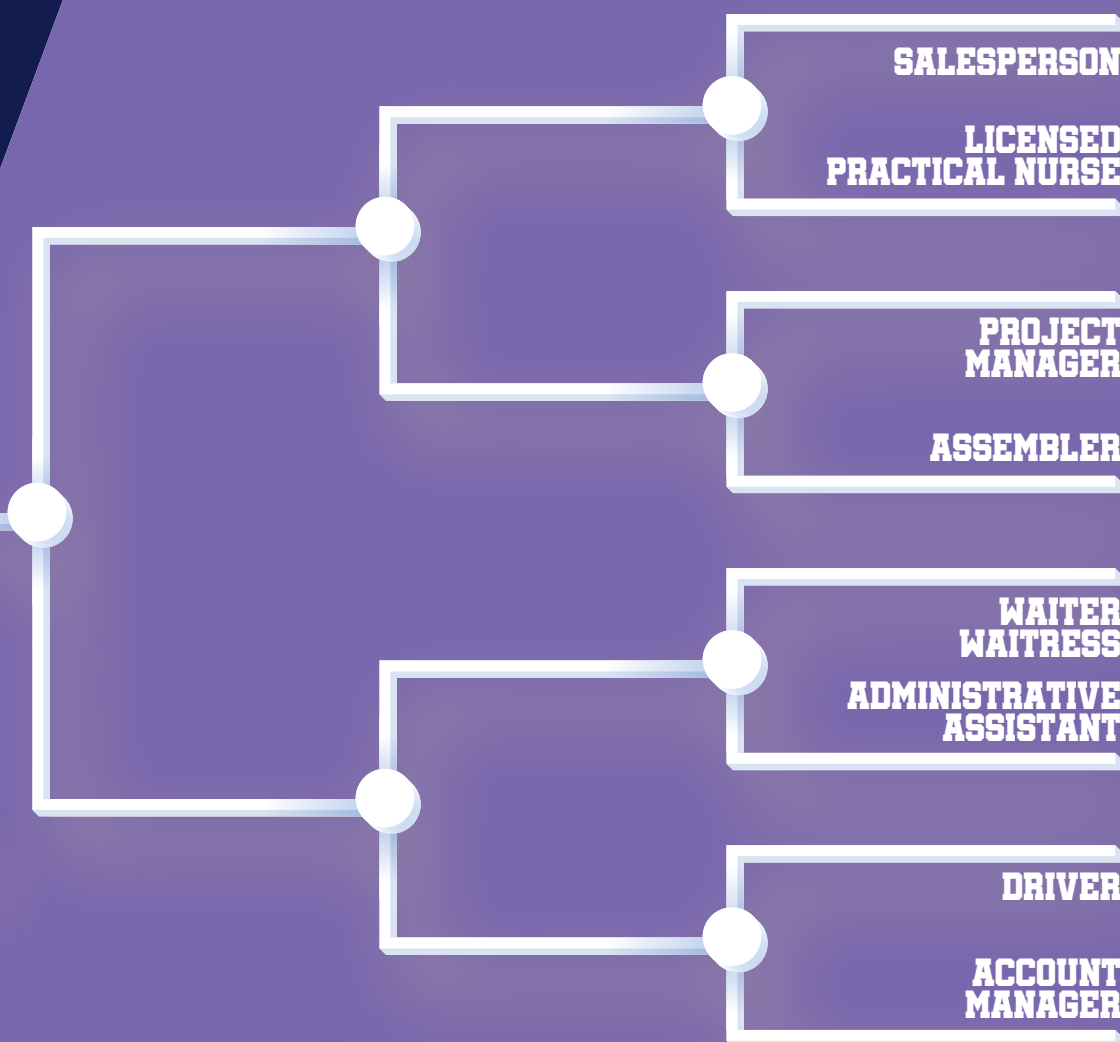
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To play, simply pick the job title that was most commonly used in the United States in 2023. Did nursing assistant best registered nurse? Did receptionist make it past the first round? Was salesperson a slam dunk, or did customer service rep nail a buzzer-beater? Winners get bragging rights at the water cooler—and a little insight into the U.S. labor market.



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