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The Happiness Index

GLOBAL WORKPLACE HAPPINESS REPORT

2026

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OnsiteHub helps distributed companies come together in the best European locations. We're big fans of remote work but also know how important those IRL high-fives and impromtu laughs are for any company culture. Let us help you facilitate team bonding and deliver an unforgettable experience for your team.

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Introduction

Every year since 2014, we've told ourselves that "This will be the year we finally write The Global Workplace Happiness Report!"

For over a decade, we've found every excuse.

We were always waiting for the "right time" or too busy focusing on our customers. The more I think about it, the more I am convinced we were just a little bit scared of putting out something this big, and we got lost in the pursuit of perfection.

We always viewed a report of this scale as an endpoint; a neat summary of all the data we'd gathered and everything we had learned along the way. But as we began to sift through this year's data, we realised we were wrong. This report isn't the end. It's just the start. We don't need to have all the answers, we just need to share what we are learning, bit by bit, year by year.

Since 2014, we have surveyed over five million employees and analysed over 250 million data points from 170 countries. As someone who has read every research paper and happiness report available, I still believe that as a global society, we know less than 0.5% of what there is to know about human beings and happiness. We have only scratched the surface of what motivates us, what makes us truly productive, and what helps us thrive.

This report is a starting point to learn more

This project is an invitation to bring together an international community of leading academics, business experts, and creative thinkers to slow down and work out how we can actually improve the world of work.

We didn't start The Happiness Index to create "happy" employees. We started it because we saw unhappy ones, and we realised that it was a performance issue we wanted to fix.

In the last 11 years I've learned that can't *make* an employee happy. But you can take steps to understand the ingredients required to make a healthy environment and work hard to provide them.

This report brings those ingredients together and infuses them with data to help us all make better decisions when building organisations that grow and thrive.

Benchmarking yourself

I often use the analogy of Strava, the cycling and running app. The reason Strava is so effective isn't just because you can see how other people are performing; it's because it allows you to benchmark yourself.

I would love for everyone who reads this report to take the findings and do the same study with their own company at no cost (we've made this free on our website). Then use that information not to be "right" or "better than some," but to improve your evidence-based decision-making.

Data as a story

I'm a firm believer that data is simply the plural of anecdote. Every person who fills out a survey is sharing an anecdote of their lived experience. We put those millions of anecdotes together to see the trends, and we then turn those trends back into one big anecdote called *The Global Workplace Happiness Report*.

Our contributors and partners

I want to finish by thanking our contributors and sponsors. It was vital to us that these findings were not commercially influenced, massaged, or tweaked to help sell products. Our sponsors are here because they want to improve the world of work. If they sell more stuff by being associated with this report, then great, but it won't be because they influenced the findings.

They put zero pressure on us to adapt the narrative and believed in our ethos of letting the data tell the story. If you read something here that you agree with, or perhaps more importantly, something you disagree with, please get in touch.

Year zero

This is a pilot year, and we want to hear from you; we want to learn together. This is a journey of finding a way to work that benefits both human beings and the financial success of organisations.

I was lucky enough to work with many different experts on this report, but I think they would all agree that no one has done more for advancing the case for wellbeing and happiness across society than Prof Lord Richard Layard.

In early 2026, Richard said a version of this to me, and it helped paint the picture of where we need to start:

> *People are fed up with the kind of work organisation that uses fear as a motive, and they increasingly understand that workplace happiness is one of the best sources of productivity and organisational performance.*
>
> *Prof Lord Richard Layard*

I hope you enjoy the report.

Sláinte agus saol (health and happiness),

Matt Phelan
Co-Founder and Co-CEO
The Happiness Index

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Global Workplace Happiness Report

Executive Summary

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The Global Workplace Happiness Report is based on responses from over 80,000 working people across 115 countries. The analysis that follows draws on more than 1.9 million individual data points and nearly 90,000 written comments.

The findings are organized in three layers: the global patterns that hold across the full dataset, the demographic and organizational dimensions that reveal the variations in those patterns, and an examination of eight neuroscience themes, supported by a wide variety of perspectives from leading academics and practitioners.

The report draws on neuroscience research that classifies the key drivers of happiness and engagement into eight psychosocial needs: Safety, Relationships, Freedom, Acknowledgement, Meaning and Purpose, Clarity, Personal Growth, and Enablement.

Each need is served by several contributing factors. For example, to achieve a sense of Freedom, we need authenticity, autonomy, and belonging. The questionnaire has been designed to score how each need is being met. A detailed **methodology** and a further explanation of the **neuroscientific framework** are in the **Appendices.**

Findings at a glance

1. **Organizations are investing the most** in what **matters the least.** The strongest predictors of happiness at work are inspiration and belonging. The weakest are workload management and role clarity.

2. **Where people work has a larger effect than any other variable in the study.** Remote and hybrid workers outscore office and field-based workers on nearly every dimension.

3. **Young people** benefit from some time in the office. For the cohort aged 19–29, hybrid work outscores being fully remote in the key areas of career progression and learning.

4. **Happiness at work** increases with age. But while some measures improve steadily, others dip in mid-life only to recover in our later working years.

5. **Male respondents** outscore female respondents on 28 of the 29 survey questions. The gaps are individually small but cluster around cultural dimensions, such as feeling valued, a sense of belonging, and freedom.

6. **Acknowledgement and Personal Growth** are the lowest-scoring dimensions in virtually every country in the dataset. Yet these are the strongest correlates of advocacy and retention.

7. **Middle managers** are happier and more engaged than the people above and below them. The wider C-suite (excluding CEOs) reports some of the lowest happiness and work-life balance scores in the study.

8. **Happiness and engagement** follow a J-shaped curve by company size. Mid-size firms sit in the deepest trough, having outgrown the intimacy of a small team without building the infrastructure of a large one.

9. **Many employees hit a plateau of inspiration** and happiness after five years with the same employer. Scores recover modestly for those who stay past ten years, but this cohort posts the lowest eNPS, suggesting they are loyal, but unwilling to advocate.

10. **eNPS is negative in half the countries surveyed.** Satisfaction with the mechanics of work doesn't automatically translate into a willingness to recommend the employer.

11. **Less than 1% of qualitative comments mention AI.** The technology is present enough to provoke interest but not yet embedded enough to reshape how workers feel about their jobs.

Organizations aren't fulfilling employees' emotional needs, and it's costing them both

The most important finding in this report may be the gap between what organizations deliver and what actually makes people happy and engaged at work.

An analysis of the survey data reveals that the strongest predictors of overall happiness are inspiration and a sense of belonging – the emotional, cultural dimensions that depend on how people feel about their organization and their place in it. Yet employees rank inspiration at or near the bottom of the study's dimensions.

The weakest predictors are the rational, operational dimensions that tend to receive the most organizational attention, such as workload management, role clarity, and job requirements. In other words, the things that score highest in the survey seem to matter the least to happiness and engagement, and the things that score lowest matter most.

This tension runs through the research. It speaks to why Acknowledgement and Personal Growth sit at the bottom of the global rankings, despite having the strongest relationship with advocacy and retention. And to why women have lower scores than men across 28 of 29 questions. It could also explain why some of the highest-scoring countries in the dataset still accrue negative Employee Net Promoter Scores (eNPS): satisfaction with the mechanics of work doesn't automatically translate into the emotional connection that makes someone willing to recommend their employer.

The Global Workplace Happiness Report is an exploration of this tension and what organizations can do about it.

Global findings in workplace happiness

- **Where we work has a more consistent effect on happiness and engagement than any other variable in the study.** Remote workers report the highest scores across nearly every dimension, with hybrid workers close behind. Field-based employees score lowest, particularly on belonging and work-life balance, with office workers sitting in between.

- **Younger employees see the career value in hybrid work.** While remote work tends to narrowly outscore hybrid arrangements in most measures, the hybrid cohort aged 19–29 outscores their fully remote peers in two critical areas: satisfaction with learning opportunities and the opportunity to progress their careers.

- **Seniority isn't a straight line to fulfillment.** Contrary to the stereotype, middle managers are happier and more engaged than the people above and below them on the org chart. Meanwhile, the C-suite exhibits some of the lowest levels of overall happiness, work-life balance, and even information flow in the study. Notably, this doesn't apply to CEOs, whose happiness and engagement benchmarks match their position.

- **Many of us hit a plateau of inspiration and overall happiness after five years with the same employer.** Employees in their first two years report the highest scores in key areas of team dynamics, and happiness, but by years 5–10, scores drop to a mid-tenure plateau that reflects institutional familiarity and minimal feedback without renewed challenge. Scores stabilize or recover modestly for those with 10+ years, though this long-tenured cohort simultaneously posts the lowest eNPS, suggesting loyalty without advocacy.

- **Older workers are unhappy with the level of feedback they receive, and unwilling to advocate for the business.** The youngest workers are the happiest with the amount of feedback they receive before scores steadily decline to their lowest point for those between 50–59, with a partial recovery at 60+. Employers aren't necessarily aware that some older workers want more formal interaction; 50-year-olds are less likely to flag the absence of feedback than younger workers. The lack of structured interaction may contribute to a phenomenon of long-tenured workers being the most committed to remaining and the least willing to advocate.

- **In twenty-nine questions, there are twenty-eight gender gaps.** Male respondents outscore female respondents on 28 of the 29 survey questions. The average difference is 0.2 points, which is individually modest, but cumulatively striking. The largest shortfalls for women cluster around feeling valued, belonging, freedom, and inspiration, which are the dimensions most sensitive to organizational culture rather than manager behavior.

While there's some gap through all levels of seniority, it's widest for female executives, where the difference stretches to 0.5 points, drawn upwards by deficits in Acknowledgement, Freedom, and Personal Growth, the dimensions that reflect whether someone feels recognized, autonomous, and able to see a future.

- **Happiness scores dip in the mid-market.** The relationship between company size and workplace happiness follows a J-shaped curve. Micro-businesses (10 and under) outperform on belonging and collaboration with employees at the largest firms (1,000+) report the highest scores across nearly every dimension. Mid-size firms with 51–250 employees sit in the deepest part of the trough, without the intimacy of a small team nor the formal structures of a mature organization. The dimensions that suffer most in the middle – trust, recognition, inspiration, career progression, and information flow – are precisely those that require intentional organizational design.

- **We're only feeling the first tremors of AI.** Less than 1% of nearly 90,000 qualitative comments mention AI. This suggests we are in a liminal moment where the technology is present enough to provoke interest and occasional anxiety but not yet embedded or impactful enough to reshape how workers feel about their jobs. Where it appears, the dominant theme is an Enablement frustration: employees eager to use AI who feel held back by organizational caution. For more advanced users, AI is evolving into a cognitive partner, but also raising existential questions about the relationship between struggle, mastery, and meaning at work.

The return on happiness

The business case for understanding and supporting workplace happiness and engagement is examined across three dimensions: the fundamental metric of equity value, organizational resilience to change, and the ability to innovate over the long-term.

The impact of employee wellbeing on **equity value** is the underpinning of investment fund Irrational Capital. In their essay, they explain the thinking and analysis behind their index, which rates public companies based on employee sentiment, and has beaten the S&P 500 in 16 out of the 19 years tracked.

The report argues that **market resilience** is downstream of human resilience: you cannot build an agile company on the backs of people who feel fragile. Organizations with high psychological safety and engagement possess the cognitive surplus to treat market shifts as problems to solve rather than threats to survive. Employees must feel safe and free for long-term **innovation**; they cannot invent the future if they're afraid to speak up, make mistakes, or be themselves.

The benchmarks of happiness and engagement

The research questionnaire is built on a neuroscientific model developed over the last 12 years that examines 24 aspects of workplace happiness and engagement (from a sense of belonging to job role clarity), as well as their impact on overall happiness and four fundamental business metrics (collaboration, productivity, eNPS, and whether people feel fairly rewarded).

An analysis of key drivers reveals that **overall happiness** correlates with the degree to which people feel inspired by their organization and their sense of belonging within it, followed closely by feeling valued and values alignment. These are emotional and cultural dimensions that reflect how people feel about their place in their organization. At the other end of the scale, the weakest predictors are workload management, job requirements clarity, and whether people see their role reflected in the success of the organization, the operational dimensions that keep work running smoothly but don't determine whether people are happy doing it.

Inspiration is also one of the strongest predictors of effective **collaboration**, along with information flow and access to resources – a mix of emotional and structural dimensions that describe an environment where people are motivated, informed, and equipped. The data suggests that collaboration isn't primarily a social or interpersonal phenomenon since team enjoyment and colleague interactions rank in the lower half. It's driven by intentional human infrastructure: whether the organization inspires, communicates, and supports.

In contrast, team **productivity** is a social phenomenon. The strongest predictors are team enjoyment, followed by the effectiveness of collaboration, degree of inspiration, and information flow.

People feel productive when they enjoy working together and when the organization keeps them informed.

The counterintuitive finding is that being able to manage your workload, the variable most obviously connected to getting things done, is the single weakest driver of feeling productive. This suggests that the lived experience of productivity is less about bandwidth and more about energy. People feel productive when they're inspired and well-coordinated, not when their to-do list is under control.

The strongest predictors of whether someone will recommend their employer (**eNPS**) are values alignment and inspiration, belonging, and trust. These are the most explicitly identity-driven dimensions in the survey, reflecting not just whether someone is satisfied but whether they see themselves in the organization.

The eNPS driver profile is the most emotionally loaded in the analysis. Advocacy is an act of personal endorsement: people recommend their employer when they feel the organization's values match their own, when it inspires them, and when they feel they belong.

The metric measuring whether people feel **fairly rewarded** is the most future-oriented in the analysis. The strongest predictors are career progression, inspiration, and feeling valued. Learning opportunities, information flow, and being listened to follow closely. At the bottom, workload management, colleague energy, and job clarity predict almost nothing.

The findings suggest that people's sense of fair compensation is more closely tied to whether they see a future, feel inspired, and feel valued than to the mechanics of the job itself. This doesn't mean pay doesn't matter, but that the view of compensation is filtered through the broader relationship with the organization.

The report examines these benchmark variables through demographic and firmographic lenses. It also explores the eight neuroscientific aspects of the happiness and engagement model in detail, including psychological Safety, Freedom, Acknowledgement, Meaning and Purpose, and Enablement.

Country snapshots

Seventeen countries with over 500 responses receive individual snapshots, including established Western economies, Asian giants, Latin America's largest markets, and emerging economies across Eastern Europe and the Mediterranean. Cultural response biases make direct country-to-country comparisons unreliable, but each snapshot is benchmarked against both the global average and a peer group of countries selected for their geographic, economic, and labor market similarities.

Wider findings include:

- **Acknowledgement is the lowest-scoring dimension in most countries.** In all but a few, Acknowledgement and Personal Growth occupy at least one of the bottom two slots, if not both. The exceptions include China and Turkey, where one of those slots is taken by Freedom and Safety respectively. This is the closest thing to a universal truth in the data.
- **Relationships is the highest-scoring dimension in most countries.** It is consistently the strongest part of people's work experience regardless of geography, economic development, or cultural context.
- **eNPS is negative in half of all countries.** Even in countries where most other indicators are healthy, a significant share of the global workforce would not recommend their employer. The threshold for advocacy is meaningfully higher than the threshold for satisfaction.
- **In every country with retention data, at least 13% of the workforce is either planning to leave or passively uncommitted.** The combined "disengaged share" (likely to leave + passive) ranges from 13.8% (Colombia) to 43.4% (Luxembourg). In 10 of 20 countries, more than 30% of the workforce falls into this category. Even the best-performing countries carry a substantial minority that has one foot out the door.
- **Perceived productivity meets or exceeds the overall happiness score in 15 of 17 countries.** Almost everywhere, workers believe their team is more productive than they are happy. The gap between output and experience suggests organizations are extracting performance today without fully investing in the conditions that sustain it.

Conclusion

The overarching finding is that organizations globally have built reasonable operational infrastructure.

People generally know what's expected of them, have the tools they need, and enjoy their colleagues.

But businesses and institutions have systematically underinvested in the more meaningful dimensions that require deliberate, sustained attention to individuals, such as recognizing their contribution and enabling their growth. These are the qualities of a culture most strongly correlated with productivity, advocacy, and retention, making the recognition deficit a commercial issue.

Also in The Global Workplace Happiness Report:

- **A step-by-step guide** to **getting the most from the report** and using it as a tool for organizational change.
- **Twenty spotlight sections** contributed by leading academics and experts in employee wellbeing, productivity, and workplace neuroscience.
- **Key findings** across demographic and firmographic lenses including **company size, gender, work location**, and **age**.
- **An in-depth explanation of the neuroscience** behind the survey questionnaire and the report's **methodology** for data collection, benchmarking, and country peer group composition.
- **A powerful, practical conclusion** on moving from theory to action with impact.

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The Global Workplace Happiness Report

GWHR 2026

The Happiness Index: Converting culture into business performance

1. Benchmarking your organisation: *Not sure how your culture stacks up?*
Our global benchmark compares your organisation against tens of millions of cultural insights from organisations around the world. Discover your strengths and uncover key focus areas for cultural improvement.

2. Employee engagement platform: *Curious how your people think, feel, and behave?*
Our engagement platform gives a live view of your cultural health. Use research-backed surveys or create your own, then explore insights to see what really drives engagement at every stage of the employee journey.

3. Culture consultancy: *Unsure what's driving impact or where to focus?*
Our consultants turn insights into action. We help you build a culture that boosts performance — from revenue and profit to customer retention. Wherever you want to see results, we help you get there faster.

The Happiness Index

About The Global Workplace Happiness Report

Year zero

The Happiness Index has been measuring organizational happiness and engagement for over 12 years, but this broad, international study is a new effort to help leaders, researchers, and practitioners better understand what drives happiness and engagement at work.

This report is a first step. We're explicitly calling this "year zero" because we expect and want it to evolve.

We already know that future editions will have the benefit of wider geographic coverage, year-over-year data, and additional statistical modeling. But we're most excited for the improvements that will be driven by its readers and the workplace wellbeing community.

We urge you to share your ideas, questions, and suggestions with us at gwhr@thehappinessindex.com.

Getting the most from the report

Our goal is to help readers explore why happiness in the workplace matters, how their organization compares to others, and what to do to act on the findings.

Throughout the report, you'll find insights from leading academics, experts, and practitioners in workplace wellbeing and how that links to business performance. Their contributions are grounded in years of research and practical engagement with organizations as varied as early stage startups, Fortune 50 multinationals, and the NHS.

The structure of *The Global Workplace Happiness Report* moves from big-picture insights to more detailed benchmarks.

1. Start with the big picture

In the **Introduction** and **Executive Summary**, you'll find an overview of the findings and themes from the granular analyzes in later chapters.

From there, in **Chapter 2**, we explore the **Global Findings in Workplace Happiness** arising from this research. In this first edition, we look at the relationship between workplace wellbeing and key variables including location, age, and seniority, as well as the implications of AI on happiness and engagement.

A good way to put these findings into context is to take a minute and **Reflect with Intention,** the next section of this chapter. The co-founder of The Happiness Index sets out a series of questions in an essay designed to help you get the most value from the research by applying the lens of your unique organization.

2. Understand the methodology and neuroscience framework

You'll find a **Methodology in Brief**, detailing the data sources and survey approach used in this research, along with short explanations of the **Neuroscientific Foundation** that underpins the research later in this chapter. These will help you interpret the charts and scores that appear throughout the report. Further in-depth explanations are located in the **Appendices**.

3. Consider the return on happiness

Why do businesses want happy, engaged workers? Ultimately, it's because their wellbeing has very real implications for organizational health and success. **Chapter 3** explores **Equity Value**, **Resilience**, and **Innovation** through the lens of workplace wellbeing. It's a critical read for those who want to understand the why of happiness and engagement work, and ideal for executives looking to make the business case for measuring and improving wellbeing.

4. Dig into core findings

Chapters 4 and 5 cover the granular results of The Global Workplace Happiness Survey, beginning with the five **KPIs of Happiness at Work**, such as **Productivity**, **Intent to remain**, and **Fairness of reward**. From there, we examine the eight neuroscience-based needs that underpin those outputs, including psychological **Safety**, **Personal Growth**, and **Enablement**.

Throughout, benchmarks are analyzed through demographic and firmographic lenses, including **age**, **seniority**, **gender**, and **company size**.

5. Explore the world through happiness and engagement

Of the 115 countries represented in the survey, 17 have more than 500 responses, and in **Chapter 6** you'll find statistical **Snapshots** of them that illustrate key findings. From China to Luxembourg, each country is compared to **global averages** and a **peer group** to bring cultural and international context to the results.

6. End on a new beginning

Finally, be sure to read the concluding essay in **Chapter 7** on **Actually Executing: How to Start Moving from Good Intentions to Impact**, a very practical guide to making the leap from theory to action.

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Reflect with Intention: From Cultural Insight to Commercial Performance
Spotlight: Tony Latter

Tony Latter, Co-Founder and Chief Platform Officer of The Happiness Index.

This report is designed to serve two purposes: to act as a growing source of benchmarks for employee happiness and engagement, and as a practical tool organisations can use to analyse and develop their culture and employee experience.

To get the most value from the report, use the findings to contextualise your own organisation, both by how people *think* (engagement), and how they *feel* (happiness).

If you haven't already done so, we recommend running The Happiness Index Global Benchmark Survey within your organisation. This enables you to identify the specific strengths and weaknesses of your culture using a validated set of questions grounded in the neuroscience of how people think, feel, and behave at work.

The results can be analysed across a wide range of filters, including by sector, to build a granular understanding of your organisation that can be directly compared against global benchmark data. The Happiness Index Global Benchmark Survey is free to use, and registration details can be found here.

To truly optimise culture, organisations must also be clear about what they are optimising for. In practice, this means linking culture data to the outcomes that matter most beyond the people function. These vary widely; we've worked with businesses seeking to increase average transaction value in retail, improve customer satisfaction in call centres, and boost productivity in warehouse fulfilment teams. We've also supported charities focused on improving quality-of-life outcomes for vulnerable people in their care.

The logic is simple: culture and employee experience shape employees' ability to do their jobs. Employees directly influence organisational performance. Investing in your culture, therefore, is not an abstract concept – it is a practical lever that affects real-world outcomes.

Viewing culture through this lens makes data more relevant and easier to prioritise, while also challenging widely held assumptions. For example, we have observed negative correlations between popular engagement metrics, such as Employee Net Promoter Score, and commercial KPIs like Average Transaction Value. In some retail cases, stores where employees were most likely to recommend the workplace actually performed worse on sales! Findings like these demonstrate the nuances of workplace culture, and the importance of a holistic approach to measurement.

Questions for reflection

Taking a few minutes to consider the following questions will help you get the most from the report and move toward leading a material change.

1. **What specific business outcome are we trying to improve through our culture?** (E.g., retention, innovation speed, or customer satisfaction.) After all, if you can't link wellbeing to a critical KPI, it will be the first budget cut during a downturn.

2. **Do we know the difference between how our people *think* about their jobs and how they *feel* while doing them?** An employee can be engaged (working hard) but unhappy (burning out). One is a positive short-term signal; the other is a long-term risk.

3. **Are there areas where our people metrics do not correlate with our performance? Are we prioritising being liked over being effective?** Healthy cultures require kind honesty and high standards. Sometimes, the most engaged teams are those facing the toughest challenges together, not necessarily the ones with the highest scores for likelihood to remain.

4. **Are we relying on gut feel, or do we have a granular, benchmarked understanding of our people across different geographies and roles?** Intuition is often biased. Validated data, like that found in neuroscience-based surveys, reveals the blind spots that leaders often miss from the top.

5. **What is one deliberate improvement we can make based on what our people are actually telling us?** Enthusiasm turns to apathy when employees share their feedback but see no change in how the organisation operates.

Starting with critical questions like these will help determine which insights are genuinely transformative, moving your organisation beyond intuition toward evidence-based decision-making.

If you're unsure where to start, our consultants can map how your culture influences organisational performance.

[You can book a consultation here.](#)

Finally, data only creates value when it leads to action. Whether you are applying the insights from this report, running your own survey through our employee engagement platform, or working with our consultancy team, the real impact comes from making deliberate, practical improvements. Insight is the starting point, change is the goal.

Take part in the 2027 Global Workplace Happiness Report

Book a consultation

Methodology in Brief

The Global Workplace Happiness Report *draws on insights from over 81,907 respondents across 115 countries, creating one of the largest real-world datasets on employee experience.*

Data was collected between February 1, 2025, and January 31, 2026.

Unlike traditional surveys, most responses were collected within existing HR workflows, rather than through stand-alone research questionnaires. This approach reduces the self-selection bias associated with opt-in surveys and captures wellbeing data in the context of everyday work processes.

The survey also generated a bank of nearly 90,000 open text, qualitative responses that offer deep, unstructured, access into how people actually think and feel. There was no incentive or requirement for survey takers to provide these additional comments, so they are driven by intrinsic motivation.

However, limitations apply. Responses may be shaped by cultural, contextual, or social desirability effects linked to HR-related interactions, even where anonymity is emphasized.

In addition, the dataset reflects a structural selection bias for organizations with the capability and inclination to implement formal HR systems. As a result, certain groups will be underrepresented, such as the self-employed or those in companies or sectors with limited HR infrastructure. Findings should not be assumed to generalize across all labor markets.

Further detail, including response by country and the full questionnaire, can be found in **Appendix 1: Methodology of The Global Workplace Happiness Survey**.

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Understanding the Neuroscientific Foundation

Overview

The Global Workplace Happiness Report is based on an update of the original Happiness Index questionnaire, which has been in use since 2014.

This psychographic tool uses neuroscience to understand how people think, feel, and behave at work. Its goal is to help organizations create cultures where employees can thrive by grounding cultural and engagement insights in how the human brain actually works.

The brain systems model

Neuroscience shows that the brain and body are deeply connected: our emotions affect our physical health, and our environment shapes how we think and feel. We embrace this holistic view, which recognizes that culture, safety, and meaning at work directly influence wellbeing and performance.

The questionnaire is based on a model that organizes human behavior around four key brain systems, each linked to core workplace needs:

Brain system	Function	Workplace focus
Basal system (Instinctive)	Drives survival and safety instincts	Feeling safe, free from threat
Limbic system (Emotional)	Governs emotions and relationships	Connection, recognition, belonging
Neo-cortex (Rational)	Enables logic, learning, and execution	Clarity, enablement, getting things done
Prefrontal cortex (Reflective)	Integrates thought, emotion, and purpose	Growth, meaning, self-fulfilment

Together, these systems explain the biological basis of motivation, collaboration, and engagement.

At its core, the methodology aims to give people the "freedom to be human." By aligning organizational systems with how the brain naturally functions, this approach helps workplaces become more empathetic, productive, and sustainable.

Further detail can be found in Appendix 2: Methodology of the Neuroscience Framework.

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About The Happiness Index and the Author

About The Happiness Index

We're The Happiness Index and we help organizations turn culture into performance through data, technology, and expertise.

Culture isn't a soft issue. It's measurable. It's tangible. And when you get it right, it drives performance and revenue. We know this because we've surveyed millions of employees globally, creating tens of millions of cultural data points across 170 countries.

The pattern is unmistakable: there's a direct, quantifiable link between culture and performance.

Our three core offerings help you convert culture into business performance:

Global benchmark: Want to know how your culture stacks up?
Benchmark your culture →

Engagement platform: Curious how your people think, feel, and behave in real-time?
Start measuring →

Performance-culture consultancy: Unsure what's driving impact or where to focus?
Convert culture into performance →

About the author

I'm Stefan Tornquist, a researcher, writer, and advisor based in Brooklyn, New York.

As a co-founder of Executive Summary RSI, I work with clients, from startups to Fortune 500 companies, to turn complex data, research, and ideas into clear narratives and guidance.

My work has often focused on the intersection of business and human experience. Over the years, I've examined how culture and leadership translate into employee behavior, customer experience, and organizational resilience. I don't view happiness as a soft or abstract concept, but as an input that directly affects productivity, innovation, and growth.

This phase of my career began in the first internet boom as a co-founder of technology startup Bluestreak, which was acquired by Dentsu. From there I gravitated towards analysis and thought leadership. I ran Econsultancy's research business in the US for many years before shifting to oversight of its learning product development.

In previous lives, I worked in restaurants and human services, tested children for the military, ran a newspaper, taught political science at the University of Rhode Island and was a paid, if mediocre, Shakespearean actor.

AI Usage Statement

AI was very useful to this project. The technology allowed us to work with 1.9 million data points and 90,000 text comments with a speed and flexibility that wouldn't have been possible otherwise.

All data shared with the LLMs was anonymous and specifically excluded from training the models outside of the project.

We worked to achieve a fair and balanced approach by employing neutral prompting techniques. To ensure accuracy, prompts were run multiple times, often across multiple AI platforms, allowing us to cross check the results.

We started drafting the usage statement below before it occurred to us that the AIs would have a clearest inventory of how they were used. The prompt for Claude was: "Based on our work together on the GWHR project and subfolders, write an AI Usage statement, using the Taylor and Francis article for guidance."[01]

This report was created with the help of AI, specifically Anthropic's Claude Opus 4.6 and Google's Gemini 3.0. We mention this because transparency matters, and because the subject of this report demands it. A study about how organizations treat people should be honest about how it was made.

AI made the work faster, broader in scope, and more consistent in its treatment of a large and complex dataset. It did not make editorial decisions, choose what to emphasize, or determine the report's arguments. Those choices – including the decision to be open about this – are human ones.

AI tools were used to query the underlying datasets, identify and interrogate patterns across demographic and firmographic lenses, translate and categorize qualitative responses, and stress-test interpretive claims against the data.

Additionally, many visuals throughout this report were co-created with AI.

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Acknowledgements

GWHR

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What is Wellbeing?
Spotlight: Mark Fabian

Mark Fabian is an Assistant Professor of Public Policy at the University of Warwick and the author of Beyond Happy: How to rethink happiness and find fulfilment.[02]

What is wellbeing? Despite the centrality of this question to human life, or perhaps because of it, there is a lot of controversy over the answer.

There are three prominent theories in philosophy. The first is hedonism – that wellbeing is pleasure. The second is that wellbeing is having your desires or preferences satisfied. The third, typically referred to as the "objective list" theory, enumerates several things that are good for people: common candidates are knowledge, virtue, health, autonomy, and happiness.

These theories operate behind the scenes of many real-world analytical tools. For example, economic models like supply and demand and cost-benefit analysis assume the preference satisfaction account of wellbeing is correct. They also assume that prices and income are reasonable proxies for the extent to which people can achieve this satisfaction.

If you're a creature of the self-help section of your local bookstore, you might be wondering, "where's stoicism?!" Stoicism is not a philosophy of what wellbeing is, but rather a theory of how it works.

And this is the problem with most philosophical theories of wellbeing: they're not very practical.

Imagine your friend comes to you because they're depressed and want advice. "Mate, just satisfy your preferences!" wouldn't be a constructive thing to say. Similarly, while enjoyment of the job is important to workplaces, there are always going to be aspects of work that are unpleasant – that's why we pay people!

The objective list theory is used quite a lot in practice, including in a workplace context, as part of the so-called "capabilities approach." Nowadays, this usually involves management working with staff to co-produce an inventory of what's required for people to be who they want to be and do what they want to do at work.

You might recognise this from the first season of *Ted Lasso*. He introduces a suggestion box to the football club he's coaching and gets informed that there's no hot water pressure in the showers. He fixes it, player wellbeing improves, they are appreciative, and their performance rises.

There are similar approaches to workplace wellbeing in sociology and geography. These disciplines emphasise that wellbeing is an emergent property of spaces and the interactions that take place there. Environment is a crucial consideration here, from bike parking and communal areas to whether hot desking facilitates camaraderie or just floods the zone with distractions.

These disciplines also tend to push beyond such physical concerns to more psycho-social dynamics. For example, co-design with staff can reveal how the power structures of a workplace facilitate or hamper wellbeing issues like autonomy, job crafting, and respect. Investigating the social structures of a workplace can reveal what determines the trust between workers and managers, and thus what might facilitate a transition to working from home or a four-day work week, if that's what staff want.

The tricky thing about a lot of these psycho-social perspectives is that it's hard to be strictly scientific about them. If you like a data-driven approach, then talking to people and using their qualitative insights to map the complex systems in your organisation might feel too woolly. Isn't there something we can measure?

Enter psychological science, which has two big schools of thought about wellbeing: the hedonic and eudaimonic traditions.

The *hedonic* tradition grew out of the work of Ed Diener, Dan Kahneman, and other behavioural and personality psychologists on happiness. It emphasises positive evaluations and experiences, which together make up "subjective wellbeing."

Especially important are evaluations of (job) satisfaction and meaning in life (or at work), and moods like joy and enthusiasm rather than boredom or frustration. Evaluations are typically measured using self-report scales, while moods are measured by asking people whether they felt them the previous day, yes or no?

The *eudaimonic* perspective has its roots in therapy and humanistic psychology in the work of thinkers like Carl Rogers and Abraham Maslow. It focuses on what sort of organism a human is and what it needs to flourish in life. There are many candidates, but the most prominent strand in this literature, and the one that has crossed over the most into human resources and organisational psychology, is self-determination theory (SDT).

SDT shows that humans have three basic psychological needs: autonomy, competence, and relatedness (and perhaps beneficence too, though the science is still young on that one). Workplaces that thwart these needs and thereby undermine wellbeing, through excessive top-down managerialism, for example, will experience higher staff turnover and lower productivity. Basic needs are measured using psychometric surveys.

Recent studies from Oxford's Wellbeing Research Centre show a causal relationship between better mood and greater effectiveness at work, and that firms with more satisfied workers typically outperform their disgruntled peers on the stock market.

But productivity isn't everything. Workplace wellbeing is a hot topic because people want more from work than money and more from the economy than growth and competition. Increasingly, if firms want to retain top talent, they need to have a mission and be a fulfilling, pleasant place to work.

There is a lot more that could be said about any of these perspectives on wellbeing, but hopefully this sketch is enough to help interpret the results of *The Global Workplace Happiness Report.*

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If you want more detail, there's a whole world of academic literature to discover, but these works are a fantastic place to start.

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Global Findings in Workplace Happiness

CWHR 2026

The Happiness Index: Converting culture into business performance

1. Benchmarking your organisation: *Not sure how your culture stacks up?*
Our global benchmark compares your organisation against tens of millions of cultural insights from organisations around the world. Discover your strengths and uncover key focus areas for cultural improvement.

2. Employee engagement platform: *Curious how your people think, feel, and behave?*
Our engagement platform gives a live view of your cultural health. Use research-backed surveys or create your own, then explore insights to see what really drives engagement at every stage of the employee journey.

3. Culture consultancy: *Unsure what's driving impact or where to focus?*
Our consultants turn insights into action. We help you build a culture that boosts performance — from revenue and profit to customer retention. Wherever you want to see results, we help you get there faster.

The Happiness Index

Location, Location, Location

Not even ten years ago, working remotely was unusual, a dinner party topic that inspired questions about loneliness and sweat pants. Then, in March of 2020, working from home became the norm for many people, especially those in knowledge work.

As pandemic restrictions eased, employers recognized their options, but weren't sure of how to square the variables. The implications of remote and hybrid work on productivity, costs, cohesion, creativity, mentorship, and retention were up for boardroom debate, and it still rages.

Adding to the confusion, the media continues to leap on every micro-trend and study, opining on the death of commercial real estate one day and on the death of remote work the next.

Today's reality is the complicated result. The headlines tend to be about large employers' mandates to "return to the office," yet US research suggests that hybrid work in the enterprise has only narrowly retreated from 55% to 51% in 2025 and the share of fully remote employees has remained stable at around 28% since 2023.[03] When the lens opens to include smaller firms in North America and Europe, studies put the share of companies taking a blended approach to between 60% and 80%.[04]

For those business leaders trying to find the balance that best serves their organization, shareholders, and workforce, the findings from The Global Workplace Happiness Survey are clear: *Where* people work has a more consistent effect on their happiness and engagement than any other variable in the study.

In measure after measure, remote and hybrid employees are happier and more engaged than their in-office counterparts, and they are more likely to recommend their workplace, remain with the company, and feel they are fairly rewarded for the work they do.

The data indicates that physical office attendance is not necessarily the primary driver for professional growth, collaboration, or productivity, even for younger cohorts.

In fact, remote and hybrid models outperform traditional office settings across most key performance indicators.

Some of the sharpest differences are where one might expect. Those in office roles are the least satisfied with their work-life balance, for example. But some of the findings run counter to expectations, or at least popular narratives.

Learning, development, and progression

One of the main arguments for office-based work is the assumption that physical proximity equates to professional development. Learning and development is an area of growing concern as organizations consider how junior workers will accumulate skills and institutional knowledge in a hybrid or remote setting, particularly against the backdrop of AI and its potential impact on tasks typically associated with entry-level roles.

Work styles vs. Selected measures

Legend: ■ Field-based ■ Office ■ Hybrid ■ Remote

How satisfied are you with the balance between your work and home life?
- Field-based: 6.6
- Office: 6.9
- Hybrid: 7.3
- Remote: 7.6

How well does your organisation keep you informed?
- Field-based: 6.7
- Office: 6.8
- Hybrid: 7.1
- Remote: 7.5

How likely are you to recommend working here to a friend or relative?
- Field-based: 6.4
- Office: 6.5
- Hybrid: 7.0
- Remote: 7.4

How much do you feel your opinions are listened to?
- Field-based: 6.3
- Office: 6.6
- Hybrid: 7.1
- Remote: 7.3

How often do you receive feedback on your work?
- Field-based: 6.1
- Office: 6.3
- Hybrid: 6.7
- Remote: 7.0

Axis: 6.0 — 6.5 — 7.0 — 7.5 — 8.0

At the same time, the provision of learning opportunities is a consistent area of weakness for employers, ranking 21st out of the 24 dimensions in the survey.

While remote employees overall tend to have the highest scores in this area from age 30, the data supports a nuanced approach for younger employees. For those aged 19–29, a hybrid environment appears most effective for growth, yielding the highest scores in satisfaction with opportunities for both learning and career progression.

However, this effect only goes so far. The office setting lags behind the remote and hybrid models even for younger workers.

Collaboration and productivity

The data also challenges the assumption that face-to-face interaction is essential for teamwork and the productivity it powers.

Across age ranges and virtually every other variable, remote workers report the highest scores for their teams' effectiveness at collaboration, significantly higher than hybrid environments and office workers. It's worth noting that this holds true even for junior remote workers, who might be assumed to want more in-person collaboration.

Similarly, remote and hybrid workers report higher productivity for their immediate team than those in the office in every age range. One likely driver is autonomy. Remote and hybrid employees consistently report higher Freedom scores in the survey, and the research broadly supports the connection between a sense of control over one's work and the quality of its output.

When employees can structure their environment, their schedule, and their concentration around the demands of the task rather than the rhythms of an open office, it appears to show up directly in how they and their colleagues perform.

The gap narrows somewhat in hybrid settings, suggesting that the benefits of flexibility don't require full-time remoteness.

For organizations seeking a practical middle ground, the data argues for ending the debate about whether remote work "works" and more for examining how much autonomy and flexibility should be built into the arrangements employers offer.

Organizational retention

Another way to look at remote and hybrid work is as a benefit and a powerful motivation to stay with an employer.

For employees aged 19–49, those in remote or hybrid roles consistently express a higher intention to remain with the organization than their office-based peers, peaking for remote workers in the 40–49 range but consistent throughout.

In summary, while hybrid work supports early career development, remote and flexible models appear to optimize productivity, collaboration, and long-term commitment across the workforce.

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Intentional Offices in a Hybrid Work Era
Sponsor Spotlight: Work.Life

WORK•LIFE

GWH-R

Paul Dutnall is the CEO of Work.Life, one of the UK's leading flexible workspace operators, built on a simple but powerful belief: happier teams perform better.

The question isn't whether your team needs an office. It's *what* that office is actually for, and whether it's earning its place in *how* you build your business.

This new research from The Happiness Index reveals a striking pattern: younger employees struggling without mentorship, mid-tenure staff hitting engagement walls, executives feeling lonely and cut off. These aren't coincidences. They're symptoms of the same underlying challenge: teams lack the connections, shared context, and daily rituals that hold high-performing cultures together.

To address it, we have to start by being honest about *what* the different work environments are optimised for, and *how* we work in our different environments.

Home and office serve different purposes. Both matter

Home is built for execution: deeply focused work and individual productivity. In theory, it's low interruption, high output. But not everyone has a home environment that supports this. And even the best "doing" work still needs context, an understanding of the bigger picture, and knowing how your work connects to the whole.

The office serves a different function entirely. It's where alignment happens. Where decisions get made with full context, not fragmented across Slack threads. Where shared understanding is built, not assumed. Where trust is established through proximity and presence, not performance metrics.

This is where creativity accelerates. Where energy and momentum build. Where teams make progress on complex problems that can't be solved through a series of video calls. Where mentorship happens organically through observation, real-time feedback, and the soft skills that only develop when you're learning alongside people who've been there before.

The office is where culture lives

Not the culture in your handbook. The real culture of how you treat each other under pressure, celebrate wins, navigate challenges, and share your unique rhythms and rituals. That's what moves people forward together and gives your organisation energy and character.

When this connective tissue is missing, the research shows exactly what happens: isolation, stagnation, disconnection, struggle. People feel less capable, less engaged, and less like they're part of something that matters.

The purpose has changed

For individuals, the workspace is about their environment, a place designed to enable the work that requires inspiration, support, and collaboration.

For teams and companies, the workspace is about energy and culture, the conditions that make collaboration effective, decision-making sharper, and growth possible.

This is what intentional offices deliver: purposeful environments that your team wants to use because they genuinely support the work and culture that drives the business forward.

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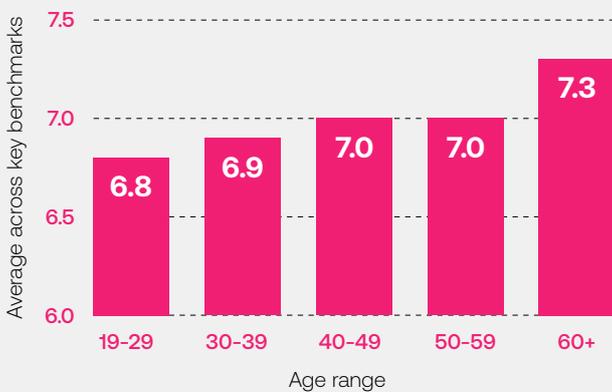Global Workplace Happiness Report

A Career in Decades

Broadly speaking, the story of aging is one of gradual improvement, largely mirroring patterns seen in wider life satisfaction research, where contentment tends to increase once people have established their careers, relationships, and sense of self.

But the headline masks a more complicated picture. Some dimensions improve steadily, while others plateau or deteriorate through the mid-career years, only to recover later. A few run in the opposite direction entirely. Taken together, the data doesn't describe a simple arc of accumulating satisfaction, but a working life shaped by distinct pressures at each stage.

Happiness and engagement by age

Bar chart: Average across key benchmarks (y-axis, 6.0 to 7.5) by Age range (x-axis).

Age range	Value
19-29	6.8
30-39	6.9
40-49	7.0
50-59	7.0
60+	7.3

If there is one variable that most cleanly tracks the age curve, it is work-life balance. Scores rise through steady, incremental gains across each decade. The early career years carry the heaviest burden, likely reflecting a combination of determining a path, financial pressure, the demands of proving oneself, and the particular difficulty of drawing boundaries when we are still establishing our professional identity.

Perhaps the most structurally significant finding in the age data is how little career progression scores change between 19–59 years of age.

They are essentially a flat line through four decades of working life. Inspiration follows a similar pattern, lowest between 19–29 and only improving modestly until finding a peak at 60+.

Universally the weakest dimensions in the survey, career progression and inspiration scores don't meaningfully improve until most career ambitions have either been fulfilled or relinquished. The implication is that the feeling of being blocked, uninspired, or lacking upward momentum is not primarily a young person's problem that resolves with experience. It is a persistent condition for the majority of the workforce, and organizations that treat it as a new-entrant issue are likely addressing the symptom in the wrong place.

Satisfaction with the level of feedback wanes

One of the patterns in the data is the direction of frequency-of-feedback scores. The youngest workers are happiest with the amount of feedback they receive before scores steadily decline to their lowest point for those between 50–59, with a partial recovery at 60+.

Junior employees are more likely to be in structured development environments with regular performance conversations, while mid-to-senior professionals typically receive less formal feedback as they gain experience. The findings suggest that some older workers want more formal interaction than they're getting; 50-year-olds are less likely to flag the absence of feedback than the absence of autonomy.

The organization stands to benefit from exploring what veteran employees want from feedback, as they have the most institutional insight to pass on and the most to lose from professional stagnation.

Team enjoyment holds, but energy declines

The relationship data contains a telling divergence. Enjoyment of one's immediate team is strong and stable across age groups. But the score for "to what extent do interactions with colleagues boost your own energy and motivation" tells a different story, peaking for those aged 19–29 and declining for those aged 50–59, only to recover at 60+. The relationship with line managers follows a similar downward slope through mid-career, reaching its nadir for those between 50–59.

But age isn't independent of role and status dimensions. Younger workers tend to have clear social positions within a team. Mid-career professionals occupy murkier territory. They may be managing people they once sat next to, competing with peers for senior roles, or navigating the particular tension of being experienced enough to see organizational dysfunction clearly but not powerful enough to change it. Relationships that might once have felt collaborative start to carry more political weight.

The data suggests that while team cohesion remains broadly intact across the career, the energizing quality of workplace relationships diminishes significantly through the most productive working years.

The fact that these patterns correlate with age doesn't make them immutable. Life stage creates pressure, but our work experience design determines whether that pressure gets amplified or absorbed. For both younger workers and those in their fifties, there are concrete things organizations can do.

For younger workers: fundamentals not perks

The 19–29 cohort is typically overloaded and under-supported. The temptation is to respond with benefits and social programming, but the data points elsewhere. What younger workers need most is relief from the specific pressures bearing down on them: unmanageable workload, a work-life boundary that barely exists, and a trust deficit.

The highest-return interventions here may be structural rather than social. Genuine flexibility (not just the days off in the handbook, but the kind where a 25-year-old doesn't feel professionally penalized for using it) directly addresses the balance scores that are this group's clearest pain point.

Workload transparency, where managers actively monitor capacity rather than simply cascade tasks, addresses the manageability problem. And frequent, honest feedback (which younger workers both value and receive more of than older colleagues, suggesting it works) should be built into workflows rather than left to ad hoc discretion. The worst thing an organization can do with a capable, motivated young employee is leave them guessing and drowning in their inbox.

For workers in their fifties: visibility, not just consideration

By most objective measures, the 50–59 cohort is at or near the peak of their professional capability. They are experienced, committed, and have the lowest voluntary turnover of any working-age group. Yet they are among the least likely subgroups to recommend their employer, the most likely to find workplace relationships draining, and receive less feedback than at any other point in their careers. The organization, in many cases, has stopped investing in them.

The most important shift is treating this group as people still in the middle of their working lives. That means offering meaningful challenge rather than simply counting on them to stabilize existing processes, and ensuring feedback continues with the same regularity as for junior colleagues, even if it takes different forms.

It also means acknowledging the particular pressures of their life stage and its "sandwich generation" demands of caring for children and aging parents simultaneously. Managers can't solve these issues, but flexibility and genuine empathy can meaningfully buffer them and increase trust.

The opportunity for circular engagement

There is also an opportunity most organizations miss. Workers in their 50s have a high appetite for mentoring while younger workers have a genuine need for the informal guidance that experience can provide. Pairing these two cohorts serves both simultaneously. The younger worker gets the trust and visibility they're missing; the older worker gets the relational energy and purpose the data shows is fading.

It is one of the few interventions where the needs of two underserved groups genuinely overlap, and it costs almost nothing to design. There's also a payoff to all parties, with higher rates of promotion for both mentees and mentors, suggesting a positive loop that benefits the organization.[05]

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The Trough at Year Five

It's easy for employers to fall into predictable assumptions. Younger workers are overwhelmed. Senior staff prefer to be left alone. Middle managers are miserable. And yet, none of these is consistent with the findings of The Global Workplace Happiness Survey.

Through the lenses of tenure and seniority, the data describes a surprising, nuanced picture of how our workplace happiness, engagement, and needs evolve throughout our lives.

Our tenure at a company is a powerful variable that's related to but largely independent of age. When we're new to an organization, all cylinders are firing. Employees in their first two years report the highest scores for team dynamics, overall happiness, and the ability to manage their workload.

But, like many important relationships, the honeymoon can run to fatigue over time. By years 5–10 of tenure, scores drop sharply in important areas like the degree to which they are inspired by the organization, overall happiness, and the connection between their role and the success of their employer.

A simultaneous drop in scores around career progression may indicate that mid-tenure employees encounter a "plateau" effect. Once the initial learning curve of a role is conquered, they may feel that their career trajectory has stalled if new challenges are not introduced.

Fortunately, this effect doesn't worsen with time. In fact, things are generally brighter for those who remain for 10 years or more, with their scores generally stable or inching up in some areas.

Acknowledgement by years of tenure

Legend: 0-2 years | 2-5 years | 5-10 years | 10+ years

How much do you feel valued as an individual?: 7.3, 7.0, 6.8, 7.0

How much do you feel your opinions are listened to?: 7.1, 6.9, 6.7, 6.9

How often do you receive feedback on your work?: 6.8, 6.4, 6.3, 6.1
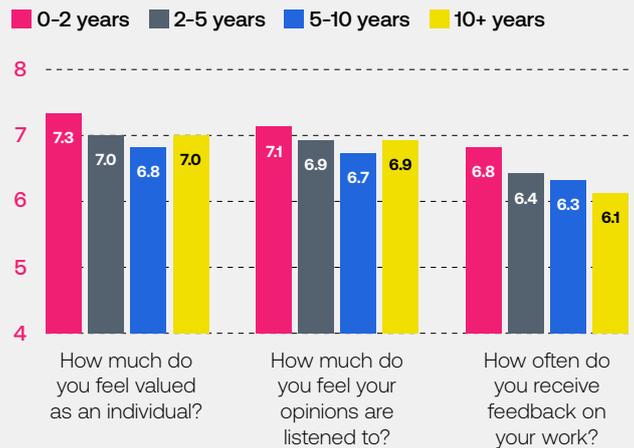
One notable disconnect with this 10+ year cohort is that while it has the highest intention to remain, it simultaneously posts the lowest eNPS scores. One clue could be that they also report the lowest scores in the sample for frequency of feedback, which often means the employee is not put in a position to provide feedback in the other direction. It can be easy to "forget" those veteran employees who are good workers and corporate citizens, but it's a mistake to take their wellbeing for granted.

The mandate for employers is to think about tenure independently of salary level or seniority.

Those in the trough of 5–10 year tenure report the lowest scores for being kept informed by their organization, which suggests a degree of disengagement when coupled with the figures around career progression, inspiration, and impact on success.

Disengagement isn't inevitable, but it is a symptom of common mid-career patterns. People at this stage are good at their jobs and rich in institutional knowledge, so they're very likely to be asked to do the same thing tomorrow that they did today.

It's on the organization to do more than simply keep the evaluations coming. Asking people about where they find (or lack) meaning in their jobs, identifying opportunities for them to share or use their expertise in new ways, and other well-researched interventions can work to reengage this frustrated cohort.

Conversely, it could be time for a change. Companies that work with employees to understand their wellbeing in all its complexity should be prepared to acknowledge that there are cases where intervention doesn't equal improvement, and both parties might be better off going their separate ways.

Seniority and a C-suite surprise

Workplace wellbeing scores based on seniority follow an interesting path. Predictably, they start out comparatively low for people in entry-level or contributor roles and rise as they advance into middle management and the lower reaches of executive leadership. But before spiking for CEOs, scores take a sharp dip for the wider C-suite.

Entry-level and contributor level employees share consistent views. On the plus side, they enjoy their professional relationships, see their teams as collaborating effectively, and generally feel that they have the resources they need.

However, they tend to be critical when it comes to personal growth, including the amount of challenge in their roles, learning and opportunity for progression. They are also less satisfied than their more senior peers with the level of feedback they receive and less likely to say they are inspired by the organization.

Meanwhile, middle managers carry the stereotype of being the stressed-out, buckling knees of a business, squeezed between demands from above and expectations from below.

But the data doesn't describe beaten-down workhorses. On the contrary, those in operational and strategic management roles enjoy the highest levels of commitment, organizational impact, and the ability to manage their workload.

They also report the highest levels of challenge in their roles, suggesting while their jobs are demanding, they have the tools and capabilities to handle the pressure.

Acknowledgement by years of tenure

■ Happiness score   ■ Engagement score

	Happiness score	Engagement score
CEO	8.2	8.2
C-Suite	6.8	6.6
VP	7.7	7.6
Strategic management	7.6	7.5
Operational management	7.6	7.5
Specialized contributors	7.2	7.1
Entry level	7.3	7.2
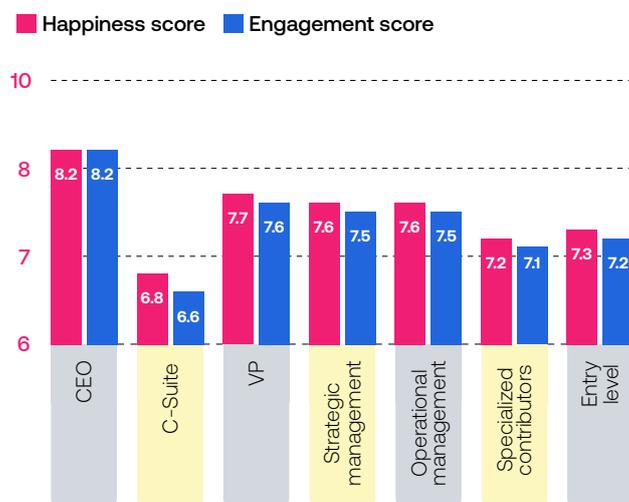
While middle management isn't miserable, some of the C-suite is. While the VP tier scores well, those near the top report some of the lowest levels of overall happiness, work-life balance, and even information flow in the study. Notably, this doesn't apply to CEOs, whose happiness and engagement benchmarks match their position in the org chart.

The divergence between the CEO and the rest of the C-suite is an intriguing fault line. One theory of the case is that while the CEO role comes with enormous pressures, it has a clarity and autonomy that other executive positions often lack. CFOs, CTOs, COOs, and their peers occupy a position defined as much by constraint as by power.

The data shows information flow scoring particularly low for this group, suggesting that they are close enough to the top to feel the weight of decisions, but not always privy to the full picture behind them. Add to this the particular loneliness of functional leadership, responsible for entire domains (finance, technology, operations) that the rest of the organization tends to treat as infrastructure rather than strategy, and the low work-life balance scores start to make sense.

The wider C-suite may be caught between floors: too senior to feel the camaraderie of the broader organization, and one step removed from the autonomy and visibility that makes the very top feel worthwhile.

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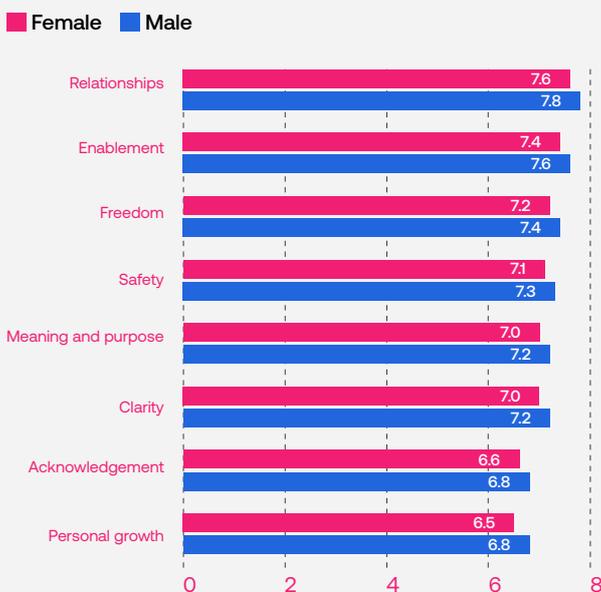
Twenty-Eight Gender Gaps

GWHR

Do workplace happiness and engagement have a gender problem? On the face of it, the differences are small from question to question and the average gap is narrow.

But those small differences crop up in almost every single question in the survey, and cluster most strongly around a few themes that carry significant implications for how organizations design their people experience.

The Global Workplace Happiness Survey data shows that male respondents score higher than female respondents on 28 of the 29 questions in the questionnaire. The gap averages 0.2 points, so none of these numbers will individually make a headline, but together they describe a consistent difference in how men and women experience work.

In contrast to variables that are susceptible to individual manager behaviour, such as workload, resources, or clarity of role, these are gaps that may form over years, reinforced by who gets promoted, who gets credit, and for what.

Acknowledgement is the weakest-performing dimension in the survey for both men and women. They give comparatively low scores to the frequency of feedback and neither gender feels as heard as they might. The persistence of this gap across all three sub-questions for female respondents matters in a dimension that is already underperforming.

Recognition systems in most organizations default to rewarding output that is visible, measurable, and attributed. Research has long documented that women disproportionately carry the informal, relational, and coordinating work of teams, essential work that doesn't necessarily rarely enter the performance conversation.[06]

Of note, seniority is no cure. In fact, the delta is largest for women in the executive suite. It's most acute in Acknowledgement, Freedom, and Personal Growth, the dimensions that reflect whether someone feels recognized, autonomous, and able to see a future. These are the areas where the executive environment is already under strain for everyone, but for women, the broader cultural deficit may compound the isolation of their positions, producing the widest gender gap at the level where representation is already thinnest.

Neuroscience themes by gender

■ Female ■ Male

Theme	Female	Male
Relationships	7.6	7.8
Enablement	7.4	7.6
Freedom	7.2	7.4
Safety	7.1	7.3
Meaning and purpose	7.0	7.2
Clarity	7.0	7.2
Acknowledgement	6.6	6.8
Personal growth	6.5	6.8

The freedom deficit

Perhaps the most significant finding is in the area of Freedom. Women score markedly lower than men in their feelings of belonging and their perceived freedom in their roles, as well as the essential freedom to be themselves.

The largest shortfalls for female respondents are in the areas most sensitive to culture: how valued and free employees feel, how inspired they are, where they think they're headed.

This difference may be related to another notable dip in the scores for feeling valued as an individual in the Acknowledgement lens, and tie in with similarly low ratings for women's alignment of values with the organization within Meaning and Purpose.

Put together, what do these scores mean and what, if anything, can be done?

As workers, we need freedom to bring our best selves to work. We can be committed and diligent without it, and women's scores bear that out. But freedom is a prerequisite for taking risks. In a modern workforce, risk-taking is the engine of creativity, collaboration, and innovation, and it shuts down if we feel our ideas won't be heard or that we can't express our concerns.

For the individual, there's a negative feedback loop that erodes their willingness to contribute beyond a "safe" level, and the potential of decreasing engagement. For the organization, that's an enormous loss in potential to optimize ways of working today and driving positive change for the future.

None of this is unique to the organizations represented in this data. These patterns appear, to varying degrees, in other large-scale workplace happiness datasets.[07] What varies is the extent to which organizations treat them as structural problems requiring structural solutions, versus surface-level issues that can be addressed with targeted programmes and well-intentioned statements.

Making meaningful changes requires a genuine examination of how recognition works, who gets visibility, how progression decisions are made, and whether the cultural norms of the organization make it easier for some people to succeed than others.

A straightforward place to start is with a recognition audit. Analyze who is being nominated, who is winning awards, whose names appear in all-hands meetings and senior communications, etc., and disaggregate that data by gender. If the distribution doesn't reflect the workforce, the system has a bias baked in.

At the same time, consider that a significant share of contributions isn't tracked and rarely enters a performance conversation. The hard labor of mentoring, coordination, culture-building, onboarding support, and other emotionally inflected work tend to make up a larger share of female employees' time than their male peers.

Organizations that take redesign seriously should examine how performance input is gathered, explicitly asking managers to account for this kind of work, and train them on what to look for rather than assuming they already see it.

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A J-Shaped Story of Company Size and Happiness

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One of the happiest, most engaged, and productive groups in the study is composed of people who work at organizations with over 1,000 employees. The next happiest group through this lens works at micro-businesses with fewer than 10 employees.

Enterprises lead on 27 of the 29 questions in the survey. Micro-businesses lead on just two: belonging and collaboration effectiveness. The enterprise advantage over mid-size firms (51–250 employees) is substantial and remarkably consistent, averaging over 0.6 points across the full questionnaire. On learning opportunities, career progression, and how well the organization keeps people informed, the gap widens.

The enterprise advantage is strongest in the relational and structural dimensions of Relationships, Clarity, and Enablement, which suggests these firms benefit from both formal infrastructure (communication processes, defined roles) and the cultural norms that come with scale.

Micro-businesses punch above their weight, but only sometimes. The 10-and-under group scores well on understanding job requirements and the employee's perception of their organizational impact. They also lead the mid-tier on collaboration. Presumably, in a very small team the link between your work and the organization's success is self-evident.

But the micro-firm advantage breaks down on work-life balance and on feedback frequency, which sit closer to the mid-size trough than to the enterprise peak. Small teams see you clearly, but formal boundaries and structured development processes are thin.

Companies in the mid-tier hit their lowest points for belonging, trust, feeling listened to, feeling valued and inspiration. These are often the dimensions that rely on intentional organizational design rather than organic proximity.

The pattern suggests a transition zone where the intimacy of a founder-led team has dissolved but the formal structures of a mature organization haven't yet been built.

Career progression is a universal weak spot, but it's particularly true for mid-size firms, which are large enough for people to expect a career path, but not yet structured enough to deliver one.

The J-shape represents two different models of workplace wellbeing: micro-businesses offer clarity through proximity and visibility through intimacy, but at a cost to boundaries and formal development, while enterprises invest in structure that delivers safety, relationships, and progression at scale.

Mid-sized businesses fall between these two, no longer providing the benefits of the first without yet building the foundations of the second. The strategic question for mid-market organizations is recognizing this transition and investing in the infrastructure around communication, recognition, and career progression to ensure the trough doesn't become a talent drain.

Next steps for mid-market organizations

Measure what you're losing

Run a baseline engagement survey, capturing tenure, team, and role. The mid-size trough is defined by dimensions like trust, inspiration, and feeling valued that erode quietly. It's also critical to understand whether deficits in these areas are felt by top-performing employees, who typically enjoy the greatest job mobility. Mid-sized companies are often unable to match enterprise salaries or offer the potential upside of high-growth scale-ups. Properly optimized, culture could be a powerful retention tool and a magnet for talent.

Audit your information flow

Mid-size firms score lowest for keeping employees informed. How do decisions and updates actually reach people? Is gossip the main source of news for some teams? Are there pockets where people are well informed and others where there's a deficit? Map the information stream and build a plan with consistent cadence (weekly all-hands, structured team updates, leadership digests) to turn a trust problem into a strength.

Build a recognition system that doesn't rely on proximity

In a 10-person company, contributions are visible by default. At 150 people, they're not. Create explicit mechanisms to surface and credit work, particularly the coordination and culture-building labor that rarely enters performance conversations.

Protect belonging through the growth transition

Small company intimacy can't survive growth. Replace it with intentional design: onboarding that connects new hires to purpose, regular forums where people are heard (not just informed), and visible follow-through on the feedback you collect.

Formalize boundaries without killing flexibility

Micro-businesses suffer on work-life balance because boundaries are thin. Mid-sized firms are big enough to set norms (e.g. around after-hours communication, workload management, and meeting discipline) without losing the agility that's an advantage over enterprises.

Invest in management capability

The enterprise advantage in line-manager satisfaction and team dynamics comes from training and infrastructure. Equip managers to coach, give feedback, and advocate for their people. This is the single highest-leverage investment a mid-size firm can make.

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The First Tremors of AI and Workplace Happiness

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Artificial intelligence may well represent the single greatest shift in the "psychological contract" of work since the Industrial Revolution. The popular narrative is dominated by productivity (the Rational Brain), but the impact on wellbeing (the Emotional Brain) is largely unmeasured and potentially volatile.

In some roles and organizations, AI is reshaping work faster than our ability to understand its effects on wellbeing. Already, the most conservative estimate is that over 20% of knowledge workers use a large language model throughout their workday.[08] The set of technologies that we call "AI" promises efficiency and relief from routine tasks, but also raises new questions and anxieties about control, security, and meaning at work.

The Global Workplace Happiness Survey focuses on universal human needs rather than environmental factors such as technology, and there are no specific questions aimed at the impact of AI on workplace wellbeing. But that may well change in future editions as our relationship with these unique technologies evolve.

In the meantime, the survey offers some insight into how workers are thinking and feeling. A review of nearly 90,000 qualitative responses (made possible by an ironic assist from an AI sculpted for this purpose) suggests that while workers do not strongly associate AI with the happiness and engagement topics in the survey, it is likely to have a growing and changing impact.

Broadly speaking, the story may be that there is no story, at least not yet. Less than 1% of qualitative comments involved technology at all, let alone AI specifically. Where it is mentioned, the use of AI is often seen as a necessary step forward and a mark of the organization keeping up with or outpacing rivals. Less common are employees who express fear or disgust at the rise of the technology.

Is AI an assistant, partner, or rival?

One of the most frequently appearing themes is in the area of Enablement, with employees complaining that while they are eager to use AI for efficiency, their organizations are holding them back due to security concerns, budget constraints or slow-moving IT.

While other comments and reams of research confirm that AI is selectively unburdening employees, this current phase of adoption has also created a new layer of mental work, comprising the cognitive load of prompting, verifying, editing, and integrating AI outputs. For many, this feels like managing a highly knowledgeable intern who occasionally shows up drunk, adding a requirement for constant, tiring vigilance.

For more advanced users, AI is evolving into an always-on partner in thinking and working. This puts the technology to some of its best uses as devil's advocate, research assistant, coder and sounding board. At this level, for example, the speed of AI makes it possible to use frameworks like SWOT or PESTLE in the everyday flow of work or to build a digital prototype in minutes or hours.

But for users at all levels, AI can raise uncomfortable questions, both practical and existential. Not only is there the obvious concern with job security, but a less tangible worry that the nature of our relationship to our work will fundamentally change. **As one CTO in the US said:**

I've spent my life coding. Late last year it hit me that I was wasting time writing code myself, and it felt like losing a friend. I can do much more, but it has less of me in it.

Similarly, employees in the Care and Hospitality sector express frustrations with tools that increasingly prioritize data over human interaction, and push the rise of "tick-box" culture, diminishing their sense of purpose.

As GPS eroded our innate spatial memory, there is a legitimate fear that over-reliance on AI for synthesis and strategy will erode critical thinking skills. If the "struggle" of learning is removed, does the deep satisfaction of mastery disappear with it? A workplace without the friction of difficult thinking may be a workplace without the dopamine of genuine achievement.

Over time, we will discover whether the emerging model of the "human in the loop" propagates this concern to a wide range of sectors and increasingly senior roles. **As one lawyer in the UK puts it:**

> *I used to spend much longer identifying case law, so [AI] is a good thing on its face. But that research made me a better lawyer. Strangely, I miss it.*

While rare, there is a notable thread in the comments that points specifically at employers who are prioritizing automation over human connection or using AI tools to police their time.

At an instinctive level, AI may trigger a low-grade, chronic fight-or-flight response. Even when jobs are safe, any perception of replaceability can degrade our psychological safety. This background anxiety potentially reduces the brain's ability to engage in deep, creative work, ironically making the human less competitive against the machine.

Any erosion of our ability to be our most creative, valuable selves would fly in the face of the most common benefit of AI, of trading boring, repetitive, and low-value tasks for higher order activities.

The data suggests we are in a liminal moment. AI is present enough to provoke bursts of anxiety, but not present enough to have fundamentally shifted how workers feel about their jobs. As adoption deepens and the nature of work continues to change, the psychological consequences will become harder to ignore and harder to reverse. Future editions of the report will measure what this one can only guess at today: whether organizations used this moment to build workplaces where AI and human flourishing coexist, or whether they continue to simply move fast and break things.

The "AI-wellbeing" hypothesis

We believe that the organizations that will thrive in this first part of the AI era will be those with the strongest organic firewalls. The most powerful systems cannot automate a culture of trust. If your people do not feel safe (Instinctive) and connected (Emotional), they are unlikely to bring their creative and enthusiastic selves. They will cleave to familiar ways of working, hoard knowledge rather than sharing it, and resist the tools rather than embracing them.

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Shaping an AI-Ready Workforce: A Strategic Transformation
Spotlight: Kaly Little

Kaly Little is a People Partner at Google leading on people strategy and organizational change.

The arrival of the AI era demands unprecedented change; it requires a deliberate and profound transformation of our culture, leadership, and core operations. In my role at Google, I've learned that architecting an agile, AI-first organization requires harmonizing profound empathy with technological excellence. It is not just about adopting new tools; it is a fundamental rewiring of how we empower our teams to lead, work, and innovate

To make this vision a reality, we rely on three strategic shifts that move our culture from "AI-aware" to truly "AI-native."

1. Radical safety and "intelligent failure"

Technological transformation is, at its heart, a human transformation. The risk-taking required to lead in the AI era can only flourish in a culture of high trust. We draw on the lessons of "Project Aristotle," which taught us that psychological safety is the single most important factor in team success.

To make this sustainable, we've woven AI readiness directly into talent management.

Our strategic reviews now prioritize leaders who cultivate a mindset of relentless learning and embrace an AI-first culture, directly linking this adaptability to career growth. We use leadership offsites as reality checks to actively foster the psychological safety required to balance high performance with intelligent failure.

2. From delegator to "experimenter-in-chief"

True transformation begins with how our leaders show up. We champion the rise of the "experimenter-in-chief" by observing that when leaders role-model deep engagement with AI, they build a credible, reality-based understanding that inspires curiosity and empowers their teams to innovate alongside them.

Leaders today must be "organizational architects," actively dismantling systemic friction (like tool overload) and psychological friction (like risk aversion). To ensure our own teams remain empowered and insulated from industry-wide anxiety, we are evolving our managers into "player-coaches" who actively use, coach, and practice the skills needed to succeed in an AI-driven environment, drawing on the foundational manager responsibilities identified in Google's Project Oxygen.

3. The shift to "always-on" partnership

Just as our technology has evolved, our approach to development must shift to continuous, integrated learning. We are fostering a mindset shift where AI is viewed not just as a writing assistant, but as an "always-on" thinking partner.

This partnership hinges on two key components:

- **Cultivating "AI-amplified" human skills:** a focus on competencies like advanced prompting and critical thinking to mitigate automation bias, ensuring our adoption of AI remains responsible and people-centric.
- **Implementing a "human-in-the-loop" model:** a redesign of what "work" means so employees transition from doing tasks to overseeing, refining, and training intelligent systems, thus turning every task into a continuous learning and developmental opportunity.

Cultural adoption only happens when AI is embedded in the tools we use every day. At Google, we leverage AI to enhance HR processes, including performance management and coaching. By equipping leaders with real-time organizational health insights, we enable them to move from reactive problem-solving to proactive, data-driven decision-making. This isn't just about efficiency; it's about elevating human potential. By freeing up time previously spent on administration, we empower our leaders and teams to focus on deeper, creative work and strategic analysis.

Ultimately, building an AI-ready workforce requires a strategy that redefines leadership, redesigns work, and nurtures a culture where humans and technology achieve their full potential. It is about building the resilience to navigate any challenge by following where our curiosity leads.

*"Experimenter-in-chief" is a term coined by our Google School for Leaders.**

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Beyond Efficiency: How AI Can Help (or Hinder) a More Regenerative Model of Knowledge Work

Spotlight: Dr. James Hewitt

Dr. James Hewitt advises some of the world's largest organisations on how to build thriving environments and he's the author of Regenerative Performance.[10]

The promise of artificial intelligence in the workplace sounds seductively simple: do more, faster, with less effort. But decades of investment in productivity tools offer a cautionary tale. Rather than boosting efficiency and saving time, many workers find themselves drowning in digital debt and feeling more overwhelmed than ever.

Meeting invitations, email notifications, and instant messages hijack our attention 275 times per day. Messages outside the traditional workday are up 15% year-on-year.[11] No wonder 64% of people say they don't have enough time to get their work done, despite working longer hours.[12]

This pattern reveals an uncomfortable truth: new tools alone won't save us. Before we can harness AI's potential, we need to update our internal operating system: the mental "software" that governs how we work.

Too many knowledge workers are running on an outdated mental operating system.

They're stuck in what I describe as Middle Cognitive Gear: attending unnecessary meetings, toggling between applications, sending low-priority emails to signal availability, and completing tasks that generate activity but don't create value. This isn't productive work; it's productivity theatre. And AI, deployed without first upgrading our human cognitive code, threatens to amplify this exhausting charade: auto-generating more emails to respond to, scheduling more meetings to attend, and creating an even faster treadmill of always-on engagement.

Our brains aren't designed for relentless high intensity any more than our bodies are. The *locus coeruleus*, a tiny cluster of neurons that serves as the brain's alertness switch, supports optimal functioning when we shift intentionally between modes: periods of focused, demanding work (High Cognitive Gear) balanced by genuine recovery (Low Cognitive Gear), not the pseudo-rest of scrolling through feeds while half-monitoring emails that too often characterises our breaks.

Think of Cognitive Gears as your mental operating system's core update. Low Gear represents regeneration: the downtime that allows consolidation and renewal. High Gear is focused on demanding work on what matters most. Middle Gear, where most of us are trapped, is the buggy legacy code: constant task-switching and shallow engagement that exhausts without delivering value.

Once you've installed this update, AI becomes genuinely useful. These tools can protect our capacity for what matters most: the creative problem-solving, strategic thinking, and human connection that drive performance and fulfilment.

AI can draft routine communications, summarise lengthy documents, and handle administrative coordination, effectively clearing the debris of Middle Gear work that fragments our attention. This isn't about doing more; it's about doing less of what doesn't matter so we can do more of what does.

The critical distinction lies in intention. AI that automatically generates responses, schedules back-to-back commitments, and keeps us perpetually available simply accelerates the depletion we're already experiencing. By contrast, AI that gates interruptions, batches low-value tasks, and protects blocks of uninterrupted time supports a more regenerative rhythm.

Consider a simple diagnostic: Does this AI application help me spend more time in either High Cognitive Gear (focused, meaningful work) or Low Cognitive Gear (genuine recovery)? Or does it trap me further in the exhausting middle ground of constant low-grade cognitive demand?

The most promising applications aren't the flashiest. They're the ones that create space by collapsing a morning's worth of email triage into fifteen minutes, transforming scattered research into synthesised insights, or simply enforcing the boundaries we struggle to maintain ourselves. They let us work in the focused sprints our neurobiology supports, followed by the rest, which restores us.

We stand at a genuine inflection point, but the sequence matters: update your internal operating system first, then integrate the external tools. AI can either turbocharge the always-on culture that's burning out a generation of knowledge workers, or it can help us finally achieve what productivity tools have long promised but rarely delivered: not more output, but better work and better lives.

This way forward isn't about optimising every minute or quietly quitting in exhaustion. Rather, it's about upgrading how we think about thinking, then using the most powerful tools ever created to protect something fragile and precious: our capacity to focus deeply, recover fully, and bring our best to the work that matters.

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The Return on Happiness

GWHR 2026

The Happiness Index: Converting culture into business performance

1. Benchmarking your organisation: *Not sure how your culture stacks up?*
Our global benchmark compares your organisation against tens of millions of cultural insights from organisations around the world. Discover your strengths and uncover key focus areas for cultural improvement.

2. Employee engagement platform: *Curious how your people think, feel, and behave?*
Our engagement platform gives a live view of your cultural health. Use research-backed surveys or create your own, then explore insights to see what really drives engagement at every stage of the employee journey.

3. Culture consultancy: *Unsure what's driving impact or where to focus?*
Our consultants turn insights into action. We help you build a culture that boosts performance — from revenue and profit to customer retention. Wherever you want to see results, we help you get there faster.

The Happiness Index

The Return on Happiness

While leaders might intuitively know that how people feel is important, it's hard to push this agenda if you can't show the return on investment.

Jan-Emmanuel De Neve[13]

A less generous observer than Dr. De Neve might be surprised to find that business leaders do occasionally look up from the bottom line to consider how people feel.

In fact, the coldest, most capitalist view isn't that workplace wellbeing doesn't matter, but that it has a measurable impact on an organization's present value and defines its future prospects.

In this chapter, we'll look at the relationship between employee wellbeing and business value across three dimensions:

1. **Equity value** is the ultimate business metric. It captures the market's collective judgment about a company's prospects, reflecting not just current performance, but the quality of strategy, leadership, risk management, innovation, and trust in long-term value creation.

   Irrational Capital, an investment fund built on the premise that there is a durable relationship between employee wellbeing and public companies' ability to maximize operational efficiency and output, explains the structure of this approach in their essay, **Equity Value: Workplace Wellbeing and the Measure of a Business**, and shares historical performance data.

2. **Resilience** is the ability to maintain revenue continuity through changing market conditions. In this context we examine wellbeing as a risk management strategy that protects the organization against the human "asset depreciation" of burnout and "asset loss" of churn.

   Dr. Raghib Ali, Chief Executive of Our Future Health, the world's largest health research cohort with over 2.5 million volunteers, explores the profound and bidirectional relationship between health and happiness at work. In **Health, Happiness, and the Power of Prevention**, he argues that the same logic applies to organizations: waiting for problems to emerge is costly in human and financial terms.

3. **Innovation** is the capacity to turn insight, experimentation, and risk-taking into new sources of revenue, renewing products, services, and business models so future cash flows expand. Employees have to feel free and safe for long-term innovation. They can't invent the future if they're afraid to speak up, make mistakes, or be themselves.

   In her essay, **How Teams, Structures, and Culture Unlock Innovation**, Dr. Rochelle Haynes connects the dots between hybrid chaos, AI anxiety, psychological safety, and the work experience required for innovation.

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Equity Value: The Measure of a Business

GWHR

Authors: Alaina Miller, Portfolio Analyst, Bart Houlahan, Senior Partner, Ryan Wertman, Chief Operating Officer & General Counsel, David Van Arlesberg, Partner and Co-Founder.

People are our most important asset.

You'll hear this sentiment echoed in almost every earnings call and interview where executives say something to the effect of 'our people are not just employees; they are the soul of our company" or "our employees are investments not an expense" or "our people make all the difference."

Even in these times of "differences," everyone manages to agree that human capital is important. Yet when it comes to the ultimate measure of performance – a company's future equity value – the question seems to be *how important* is it?

As it turns out, human capital is *very important*. But to understand how we proved that conclusion, let's take a step back.

Human capital, defined simply as the economic value of employees' skills and experience, is quite misunderstood, particularly as an "asset." For starters, it is difficult to measure. Can you cite the metric that captures this concept at your company? Further, accounting and financial standards still treat human capital as an expense on the income statement.

As a result, human capital is systematically overlooked and under-reported. Behavioral economist Dan Ariely Ph.D. and investment strategy veteran David van Adelsberg took this a step further and theorized that it was mispriced; that if measured correctly, the relationship between a company and its people should have a link to future equity value.

In early 2018, they founded Irrational Capital to see if this connection was true, statistically significant, and predictive. The firm set out to discover if there were investment opportunities in quantifying the nuanced relationship between employers and employees.

This work led to the establishment of a new, alpha-producing investment factor: the Human Capital Factor® (HCF). This unique lens shows strong potential to deliver market outperformance by identifying publicly traded companies with exceptional workforces that exhibit high-quality sentiment (relationship) with their employees.

There are two building blocks which underpin the Human Capital Factor® and differentiate it from other investment approaches (and investment factors): the use of meaningful measures of human motivation and a comprehensive dataset.

Irrational Capital's research has been built on what social science has known for some time: that there are both extrinsic and intrinsic factors that matter in this context.

Extrinsic motivating factors are the "usual suspects" like pay scale, bonuses, vacation time, and benefit packages. They are relatively easy to measure and have some modest impact, but it is the intrinsic motivators that light up the board in terms of future equity value. Intrinsic motivators are related to sentiment, emotion, and values, such as trust, transparency, alignment, connection, pride, and more.

Irrational Capital's model captures and classifies all these motivators across seven dimensions: Innovation, Direct Management, Organizational Effectiveness, Engagement, Emotional Connection, Organizational Alignment, and Extrinsic. All seven are blended to produce a single Human Capital Factor® score for each company in the dataset.

The second building block which gives foundation to the Human Capital Factor® is the database. Through a combination of public and proprietary data, Irrational Capital's database is deep, broad, long-standing, and highly stable, encompassing over 15 million data points, 8,000+ companies, and spanning back over 18 years.

As of 2025, this data universe includes 100% coverage of the S&P 500 and the Nasdaq 100, approximately 95% of the Russell 1000 and Euro Stoxx 600, and nearly 75% of the Russell 2000.

The result is the establishment of multiple Human Capital Factor® indices, tracked by three live ETFs traded on the NYSE and CBOE exchanges.

These indices are products of Irrational Capital's algorithm which performs in-depth analysis of employee sentiment (human capital), resulting in a single number HCF score being assigned to each of the many companies for which we have statistically significant data coverage.

HCF scores are refreshed at the beginning of each calendar year, from the data collected during the prior year. The resulting HCF-scored companies are then used by Irrational Capital to construct strategic, highly risk-managed investment products and tools.

The figure below exhibits the top 100 HCF-scoring companies, equally weighted, versus the S&P 500 equally weighted over a 19-year period.

The results are quite striking. The 'HCF Top 100' research index posts a 12.5% annualized return since its inception in 2006, with 2.5% excess return over the respective S&P 500 equal weighted benchmark (as of October 31, 2025).

The performance is not only strong, but resilient, beating the index 16 of the 19 years since inception (calendar year total return basis).

While the performance upsides are compelling, the portfolio also has an edge in periods of drawdown. The maximum drawdown of HCF Top 100 is around 51.8% over the period, versus the benchmark which is 59.5%. That is nearly 800 basis points of return preserved by the HCF index.

The reward for risk tradeoff is reflected in the Information Ratio, a measure of the amount of excess return per unit of active risk (the standard deviation in daily returns versus the benchmark) in a portfolio. The HCF Top 100 has an annualized information ratio of 0.77 over its lifespan.

For context, the annualized information ratio of the US Fund Large Cap Blend peer category is -0.20, indicating that on average, funds in space do not provide adequate compensation for the risks taken.

The spread between the HCF Top 100 index and the benchmark/category in performance, return preservation, and active reward for active risk is substantial.

Irrational Capital's flagship ETF (NYSE listed: HAPI), which tracks the Human Capital Factor® Large Cap Index and is distributed by Harbor Capital, was awarded a five-star rating by Morningstar upon its three-year anniversary in October of 2025. This rating is only given to funds who are in the top 10% of category peers based on their risk-adjusted performance after three, five, or ten years.

In addition to the performance of the live investment products, the methodology underlying the Human Capital Factor® has received considerable external evaluation and validation.

Most notably is the work done by the largest bank in the US, JP Morgan. Since 2021, JP Morgan's Global Quantitative & Derivative Strategy team have been publishing independent research reports about the Human Capital Factor®. Their research confirms that the Human Capital Factor® holds true across time, market cap, and industry.

This excerpt is from JP Morgan's most recent report, issued in October 2025:

The data continues to reinforce the value of integrating human capital metrics into portfolio construction. Companies with strong HCF scores tend to demonstrate greater resilience and sustained outperformance over time, while those with weaker scores are more vulnerable to adverse market conditions.

As investors increasingly seek differentiated sources of alpha, the Human Capital Factor remains a robust and forward-looking signal for equity selection.

Other important financial researchers and academics have reviewed the Human Capital Factor® and have come to similar conclusions.

The bottom line is that all those managers who espouse the value of their people have it right. Today there is a way to measure it and gain investable access. Companies must take the message "people are our most important asset" and turn it into action.

Extrinsic motivators alone offer a limited and incomplete measure of human capital. By adding a depth of focus and consideration through intrinsic motivators, companies can leverage and invest in the sentiment of their workforces which, as demonstrated by the Human Capital Factor®, can lead to real, persistent future equity value.

Important Information:

Performance data shown is based on back-tested results. Past performance is not indicative of future results. Back-tested performance is hypothetical and does not represent actual trading. This information is provided for informational purposes only and does not constitute investment advice.

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Global Workplace Happiness Report

The Hidden Multiplier: Why the Most Overlooked Growth Strategy Is Human-First

Sponsor Spotlight: KindHive

Natalie Semmes is Co-Founder of KindHive. KindHive helps leaders and organisations identify and activate the human behaviours that drive productivity, retention, and sustainable growth.

Global AI investment exceeded $270 billion in 2025. Yet the *Massachusetts Institute of Technology GenAI Divide* report found that 95% of AI projects deliver no measurable return.

Capital is moving. Returns are not.

Most leadership teams respond by doubling down on technology, data, or process improvement. But the largest untapped returns often sit somewhere else entirely.

The highest-returning investment for most organisations isn't on a technology roadmap. It's in the people already working with you – employees, customers, partners, suppliers, and investors.

A human-first growth strategy starts from a simple premise: sustainable revenue growth comes from trust-based relationships.

In a world where automation has made many interactions feel transactional, the organisations that grow consistently are the ones that invest deliberately in how they show up for their people and their customers.

At its core, this is about **kind leadership** – not niceness, but the deliberate choice to lead as a human being. This human-first approach is what we call the "Hidden Multiplier." And most growth strategies miss it entirely.

What the evidence shows

At KindHive, we analysed academic research, commercial performance data, and real leadership practice to identify four human behaviours that consistently separate organisations growing sustainably from those that stall.

Clarity, Care, Recognition, Connection
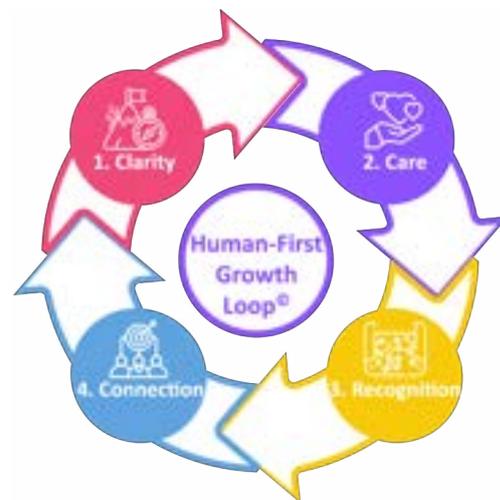
Companies that demonstrate all four are **34% more likely to double EBITDA over 10 years and deliver 17% higher profitability.** This ROI is real, and compounds over time.

Clarity enables performance

Only 47% of employees say they know what is expected of them at work.

That gap costs organisations every day in misdirected effort and missed opportunity. Companies where purpose and management clarity are strong grow revenue 58% faster, are 72% more profitable, and achieve 7.6% higher risk-adjusted stock returns.

Even at an individual level the effect is measurable. **Clear role expectations alone increase performance by about 6%.**

Leaders who articulate exactly why they are trusted, where the gap is, and hold a clear line of sight to their growth ambition, make faster decisions and build organisations that win.

Care builds trust

Global brand trust has risen to around **68%**, but only for companies perceived as behaving with authenticity and human relevance.

Inside organisations the picture is different. **Only 37% of employees believe their company genuinely cares about them.**

That gap has commercial consequences.

Improving customer experience can increase sales revenue by around 7%, profitability by 2%, and total shareholder return by 10%.

But customer experience does not improve through process alone. It improves when people believe in the organisation's direction and care about the outcomes customers achieve.

The organisations with the strongest human-first approaches create environments where employees and **customers feel understood.** That requires judgement, empathy, and deliberate relationship investment.

Recognition drives results

People repeat the behaviours that get noticed.

Recognition reduces absenteeism by 40%. Doubling recognition frequency increases productivity by around 9%.

When recognition is done well it shifts attention from products and services to the **ecosystem of people** who make great outcomes possible. It reinforces the behaviours that create long-term value rather than short-term activity.

Most of these contributions go unacknowledged. Recognition ensures they don't.

Connection creates value

Performance rarely comes from isolated individuals. It comes from the quality of relationships around them.

Strong manager relationships increase sales by 6% and individual performance by 9%. High workplace belonging is associated with a 56% increase in job performance and a 50% reduction in turnover risk.

For a 10,000-person organisation where employees experience high belonging, productivity gains can exceed $52 million per year.

Externally, the impact is equally significant. **Strong relationship management improves customer retention by 25–40% and increases sales by 15–30%.**

When organisations invest deliberately in the relationships that matter most, that investment compounds over time into deeper trust, stronger brands, and better financial results.

The advantage competitors cannot buy

Together, these four behaviours create a human-first flywheel for growth.

Clarity accelerates Care.

Care deepens Recognition.

Recognition strengthens Connection.

Connection reinforces the trust that makes Clarity credible.

Adopting an authentically human approach is one of the few advantages competitors cannot replicate simply by investing more capital.

The organisations building it now treat human-first behaviour as a growth factor, not a culture initiative.

That is the Hidden Multiplier; hiding in plain sight.

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Resilience: The Sustainability of Revenue

GWHR

In this near-term time horizon, understanding and improving employee happiness and engagement is a risk management strategy that helps maintain continuity. Resilience ensures that today's high performance isn't borrowing against tomorrow's capacity.

Historically, corporate resilience was a defensive concept, reflecting endurance, contingency funds, and disaster recovery. How well could a company roll with the punches?

But that view is insufficient as markets are now defined by a constant fight to keep up with technological acceleration, geopolitical uncertainty, and rapid commoditization.

An updated take is that resilience is the organizational capacity to metabolize change; that it's not simply to withstand a shock and return to the status quo, but to advance to a new competitive state.

Many executives view employee wellbeing as something to invest in when the market is stable and hiring is competitive. But the research suggests the opposite, that building workforce engagement and happiness is the best way to prepare for trouble.[14]

When a market shifts violently, it creates questions that corporate leadership can't immediately answer. A confused, burnt-out workforce defaults to fear, and fear creates rigidity. People hide mistakes, hoard information, and resist new tools (like AI) because they view change as a threat to their security.

In contrast, a happy workforce, with high engagement, psychological safety, and role clarity, possesses the cognitive surplus required to adapt. They start from the security of trusting their organization, and view market shifts as puzzles to be solved together rather than threats to be survived alone.

Therefore, our working thesis is that market resilience is downstream of human resilience and you cannot build an agile company on the backs of people who feel fragile.

To make resilience a practical idea, we can think of it as having three layers: operational, strategic, and cultural. While most companies engage with and even excel at the first, they often struggle with the second, and can largely ignore the third.[15]

Operations, the foundational layer, has transitioned from a "reinforce" mindset to more of a "bend, don't break" philosophy. Operational resilience is no longer about preserving a rigid status quo through redundancy and reserves. Instead, it is achieved through agility, decentralized decision-making, and modular systems. This allows an organization to quickly reconfigure and reallocate resources, ensuring familiar outcomes even as the market fluctuates.

The second layer, **strategy**, has evolved in the digital era from a fixed mapping exercise into a more dynamic capability based on rapid learning. Modern strategy is judged by the accuracy and speed with which it guides prototyping and the clarity it provides to kill initiatives that no longer fit a changing market.

The final piece, **cultural resilience**, can be the bane of companies trying to survive a period of flux. When market conditions turn negative, corporations often default to austerity, treating internal culture as a "soft" cost that can be deferred or cut.[16]

Lacking a focus on culture, the corporate definition of resilience sounds like it's borrowed from the military or sports. Do employees have the *grit* to ignore the negative, the willingness to work weekends during a crunch, and the stoicism to do more with less? But grit is a short-term solution that's insufficient for an era of compound disruption punctuated by acute crises.

Eventually, gritty determination will be depleted and an exhausted workforce won't reinvent the business. Instead, employees will consider their options, starting with the top-performing subset with the greatest job mobility.

Sustainable resilience requires teams with the emotional bandwidth and psychological safety to problem solve and adapt under pressure. If employees enjoy positive workplace wellbeing, they are capable of both endurance and creative problem-solving.

Even in the iconic example of traditional resilience, military cohesion (the measure of interpersonal bonds) is widely cited in defense literature as a stronger predictor of motivation and performance than devotion to the mission.[17]

Companies that wait for peacetime to invest in wellbeing will have lost precious time and their best chance at building a resilient culture.

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Health, Happiness, and the Power of Prevention
Spotlight: Dr Raghib Ali OBE

Dr Raghib Ali OBE is Chief Executive and Chief Medical Officer of Our Future Health.

> *Our health and our happiness are inextricably linked.*

Intuitively, we know that our health can impact our happiness. If you wake up with new pain in your back, you may find your level of happiness takes a hit that morning. If the pain eases later in the day, you'll probably report feeling happier.

The relationship also works in the other direction. Greater levels of psychological wellbeing are associated with a lower risk of disease and mortality. Not only does health impact our happiness, it seems our happiness also impacts our health.

Physical and mental ill health cause the loss of millions of workdays annually. Long-term sickness is the most significant driver of worklessness today, accounting for 2.5 million working-age people being inactive, and the figure continues to rise. And preventative healthcare provides a way to ensure we can all live longer, healthier (and happier) lives.

I first became convinced of the power of prevention when I was a junior doctor working on NHS hospital wards in the UK. In every department I worked, I treated patients who had preventable or delayable diseases, like cancer, diabetes, and stroke. These patients had risk factors, or early warning signs, that if we'd acted on early enough, we could have had a chance of preventing the development of disease. Instead, we started treatment only once the disease was symptomatic. It was, and remains, a costly approach in financial and health terms that leads to worse health outcomes for our patients and the health of the population.

How do you shift the healthcare system so that it's better able to intervene earlier? One answer is to harness data so that we get a deeper, more accurate understanding of disease risk, and to do so at scale.

Our Future Health, the organisation I have led since 2023, is seeking to do just that. We're bringing together 5 million people from across the UK to build an incredibly detailed picture of the nation's health. Already, we're the world's largest and most diverse health research cohort of its kind with over 2.5 million volunteers, and more people are joining every day.

Our volunteers share with us their health information, including their genetic data, their medical records, and answers to an extensive questionnaire about their health and lifestyle. We de-identify the data, store it to international security standards, and make it available to registered researchers through a secure computing environment. The aim is to discover new ways of preventing, detecting, and treating disease.

Take cardiovascular disease as one example. By analysing our volunteers' extensive data, researchers can test whether the calculators that clinicians use to identify people at risk of the disease based on their lifestyle and current health status, can be improved by the addition of genetic information.

Researchers can also test how well the calculators work among different ethnic groups, who have not always been the focus of previous research. By improving methods of identifying those most at risk, the healthcare system can proactively intervene to reduce the individual's risk of disease and either delay the onset or help them avoid the disease altogether, enabling people to live healthier lives for longer.

Importantly, our data also captures mental health and wellbeing and its relationship with work. Around 1.5 million people in the Our Future Health cohort are working-age adults.

From the data, we know that of people currently unable to work because of sickness or disability, 60% report having a history of depression. And we know that one in four men, and one in three women, reported experiencing symptoms of depression in the last two weeks, with the highest rates in younger adults.

Rates of severe depression vary by income: people taking part in Our Future Health with a household income of less than £18,000 are over 16 times more likely to report experiencing symptoms of severe depression in the last two weeks than those with an income above £100,000.

By enabling a preventative healthcare model, Our Future Health has the potential to deliver tangible benefits to the world's ageing workforces. Life expectancy is going up, but large numbers of people are spending many years of their later life in poor health. If we can shift to prevention, we can preserve people's ability to live those years free from chronic common diseases. That could mean fewer careers cut short by ill health and fewer people stepping back earlier than they'd wish.

The prevention model also offers employers a beneficial way of thinking about their workforces. Rather than waiting for problems to arise, organisations can use their own data to predict issues and actively support long-term health and fulfilment.

As I believe Our Future Health will demonstrate in the years ahead, prevention is not only better than cure, it is the foundation of healthier, happier, and more productive lives.

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Innovation: Future Growth

Over the long-term, elements of workplace wellbeing are a prerequisite of innovation.

Necessity may trigger the need for creative invention, but research shows that sustained innovation requires us to move beyond survival mode into a state of psychological safety and cognitive flexibility.

Stressful conditions such as a supply chain disruption or surprise budget cut will force immediate, tactical problem-solving. However, achieving a strategic mode of ongoing innovation demands cerebral and emotional resources. Employees have to feel free enough to find unconventional connections and safe enough to make mistakes.

Innovation begins with the creative generation of novel and useful ideas. This is a cognitive process requiring mental space and energy. If employees are running at high cortisol levels and burning out, they'll default to habitual, status quo problem-solving rather than divergent thinking.[18] In contrast, environments that support positive emotional states expand an individual's range of thoughts and actions.[19]

The next step is the risky transition from private thought to public expression. Absent the support of a safe environment, we will practice "impression management," silencing or curbing ourselves to avoid being perceived as incompetent, disruptive, or threatening.[20]

Once voiced, a new idea has to survive corporate scrutiny and compete for resources. This stage is socially taxing and often meets resistance. In fact, researchers have found that innovative behavior can even lead to "coworker ostracism" as the new idea disrupts the established equilibrium.[21]

Leaders who provide emotional care and advocate for resources mitigate these risks for the employee, ensuring that the social cost of being a pioneer does not lead to burnout.

Finally, implementing innovation is a marathon of trial and error. Most experiments fail, at least at first. How an organization responds to failure determines its ability to nurture creativity and turn it into value.

A culture that prioritizes wellbeing fosters the safety to learn, where a well-structured failure is seen as data rather than a performance deficit. Metaanalysis across the literature finds that psychological safety is strongly related to team learning, as well as to knowledge creation and risk-taking.[23]

Focusing on these wellbeing elements across the innovation lifecycle isn't just about supporting the creative cohort that's driving change. Successful, operational innovation depends on the people who are in the passenger seat, that majority of the workforce who turn new ideas into daily realities. And it's often where initiatives fail. As Harvard Professor Rosabeth Moss Kanter succinctly observes:

> *Change is disturbing when it is done to us, exhilarating when it is done by us.*[24]

For any transformation to truly embed, psychological safety must extend to everyone impacted by innovation. New ways of working involve a necessary learning period where mistakes are made and efficiency dips, where confusion or discomfort can read as resistance, and where resistance can feel like a rational preference for the previous status quo. Ultimately, great, big ideas will fail if the people expected to adopt them are too afraid to be vulnerable enough to learn them.

The remedy is a culture of safety and trust. High-trust environments have been shown to correlate with a 41% increase in the implementation of new ideas, as trust reduces the friction of cross-departmental collaboration.[24]

When employees can engage in risk-taking without fear of negative consequences, they are far more likely to contribute new ideas, experiment with novel approaches, and engage in the open communication necessary for creative breakthroughs. Most importantly for the organization, a psychologically safe environment allows teams to engage in the rigorous and messy process of testing, refining, and scaling concepts into tangible results.

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How Teams, Structures and Culture Unlock Innovation
Spotlight: Dr. Rochelle Hayne

Dr. Rochelle Haynes, CEO of Crowd Potential Consulting and author of OpenHR.[25]

The way we design teams, work structure, and organisational culture matters more today than ever before. Knowledge work increasingly means working across functions, time zones, and employment models. At the same time, many people are overwhelmed by meetings, unclear decisions, and uneven access to information.

These feelings affect the overall work experience and capacity for innovation, as energy drops and feelings of stress rise, impairing our ability to generate fresh thinking and new ideas.

Fortunately, the same design choices that improve daily worklife can also improve results. But if we truly want to embed happiness in the work environment, we must act with intention and reimagine teamwork, decision-making, and the wider experience.

Recent workforce reports highlight that most employees remain with their organisations for security rather than satisfaction and that trust in people management is at an all-time low.[26] This makes companies vulnerable to an exodus of key talent.

Global engagement and motivation are not where leaders want them, and low engagement is costly at scale. To create a work environment that people are happy to engage with and turn up to, we must consider how we design work itself.

Hybrid, remote, and blended teams are now common, and, when well-structured, they can strengthen retention, satisfaction, and, ultimately, performance. Despite the recent war against flexibility, with some large companies issuing return-to-work mandates, studies continue to support and associate a range of organisational benefits with more flexible and hybrid work structures.

There is also rapid growth in the use of artificial intelligence tools and a strong desire, from both leaders and workers, to apply them to reduce overload and enhance creativity. At the same time, workers' knowledge is outpacing formal training, and many newly introduced tools do not align with their current roles. This context raises the bar for how we build teams and cultures that protect wellbeing while enabling innovation.

To thrive in the current business context and leverage the increasingly dynamic workforce, leaders can take practical steps to create a positive daily experience of work that is linked to measurable results.

They should begin by explicitly documenting how each cross-functional team works. This includes protocols for decision-making, documentation, inclusion, and AI use so that contractors and employees have clarity and agency.[28] Where ambiguity exists about goals and ownership of the work process, anxiety rises, overall trust is threatened, and companies run the risk of creating a two-tiered experience in hybrid settings. To tackle this, leaders might, for example, create a summary team charter that outlines the purpose, outcomes, collaborative norms, and predictable rhythm of rituals that boost engagement and reduce stress.

This promotes a human-centric approach to work design while also making room for outcome-driven experimentation, integration, and governance of GenAI.[29]

The more blended our workforce becomes, the greater we expand our teams' capacity to and innovate without overextending full-time employees. Leaders using such models have reported faster delivery times, wider access to scarce expertise, and enhanced experimentation,[30] but only when the right protocols and norms are in place and apply equally to different talent groups.

A shift towards a more skills-based or "skills first" work environment is also necessary to accelerate upskilling and mobility as AI changes roles and careers.[31] Hence, firms must map critical skills for work, make growth paths more visible, and support continuous learning in AI fluency. There must also be investment in developing human skills such as problem-solving, collaboration, and judgment, which become more valuable as automation grows.[32]

These choices pay off in business terms. Organisations that personalise flexibility and invest in development report better attraction and retention, while skills-based mobility protects continuity and customer value.[33]

In plain terms, better teamwork supports better feelings about work, which unlock the focus and courage that innovation requires. Leaders must handle team design as a product in its own right if they want to embed psychological safety into every interaction. These investments, new norms, and daily habits can lift happiness and performance together and provide a clear bridge towards a more engaged and innovative work environment.[34]

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The KPIs of Happiness at Work

GWHR 2026

The Happiness Index: Converting culture into business performance

1. Benchmarking your organisation: *Not sure how your culture stacks up?*
Our global benchmark compares your organisation against tens of millions of cultural insights from organisations around the world. Discover your strengths and uncover key focus areas for cultural improvement.

2. Employee engagement platform: *Curious how your people think, feel, and behave?*
Our engagement platform gives a live view of your cultural health. Use research-backed surveys or create your own, then explore insights to see what really drives engagement at every stage of the employee journey.

3. Culture consultancy: *Unsure what's driving impact or where to focus?*
Our consultants turn insights into action. We help you build a culture that boosts performance — from revenue and profit to customer retention. Wherever you want to see results, we help you get there faster.

The Happiness Index

Overall Happiness

What makes us happy at work? Using key driver analysis, it's clear that the foundations of workplace happiness are emotional and cultural. This method examines which survey questions most strongly predict overall happiness at work.

The outputs are correlation coefficients, which tell us what matters most to whether someone reports being happy, not just what scores highest in absolute terms.

This method examines which survey questions most strongly predict overall happiness at work.

The outputs are correlation coefficients, which tell us what matters most to whether someone reports being happy, not just what scores highest in absolute terms.

Key drivers: *Overall, how happy are you at work?*

Top three drivers			Bottom three drivers		
Inspiration	Belonging	Feeling valued	Interaction with colleagues	Clarity of job requirements	Ability to manage workload

The variables with the strongest relationships to happiness describe how we feel about our organization and our relationship with it: feeling inspired by the organization, a sense of belonging, and feeling valued as an individual.

The bottom tier is the mirror image of emotion and culture. These are the operational and structural dimensions – the hygiene factors that make work function smoothly. They matter, but they don't make people happy. The weakest predictors of happiness are workload management, clarity around job requirements, and whether interactions with colleagues boost energy.

The implication is that the dimensions that score highest in the survey (Relationships, Clarity, Enablement) are the weakest drivers of happiness, while the dimensions that score lowest (Acknowledgement, Personal Growth, Meaning and Purpose) are the strongest drivers.

Organizations are investing most in the things that matter least to how people actually feel, and underinvesting in the things that matter most.

Inspiration is the single strongest driver and one of the lowest-scoring questions in the survey. This is the biggest gap between importance and delivery in the entire dataset. People who feel inspired by their organization are overwhelmingly likely to be happy, but most people don't feel inspired.

Belonging is in a statistical tie for the strongest predictor of happiness in the entire survey, yet it consistently scores lower than the dimensions around it. People are more likely to feel free in their roles or to feel they can be themselves, than to report sense of actually belonging at the organization.

What does this mean?

That gap matters because belonging isn't something an individual can generate on their own. You can independently manage your workload or build a good relationship with your manager, but belonging is conferred by the environment. It's the product of whether you see yourself reflected in the organization's values, whether your contributions are noticed, and whether people make room for you in conversations and decisions. It requires the organization to do something, not just the individual.

The key driver analysis suggests that when belonging is present, it's one of the most powerful contributors to happiness. When it's absent, the other dimensions can't fully compensate. You can enjoy your team, feel challenged, have a great manager, and still feel like you're on the outside of something.

The common thread is that belonging doesn't sustain itself. It needs to be actively maintained – through recognition, through inclusion in decision-making, through visible follow-through on what people say. The organizations in this dataset that score highest on belonging aren't the ones with the best perks or the most social programming; they're the ones where people feel their presence matters to the outcome.

Demographic splits

- **Age.** Overall happiness follows an upward curve, lowest in the early career years before climbing steadily through each subsequent decade to peak for those aged 60+. The trajectory broadly mirrors life satisfaction research, where contentment rises once careers, relationships, and identity are more settled. The 19–29 cohort's position at the bottom isn't explained by any single dimension. It appears to reflect the compound pressure of establishing boundaries, proving oneself, and navigating the lowest trust and work-life balance scores in the age data.

- **Company size.** Employees at the largest firms (1,000+) are the happiest, while those at small and mid-size firms share the lowest scores. Micro-businesses (10 and under) sit in between. The gap between employees at enterprises and mid-size businesses is the largest on this question than in any of the other company-size comparisons, and ties to the dimensions that define the mid-market trough:

recognition, information flow, career progression, and inspiration. These elements require intentional organizational design and don't emerge organically once a team outgrows a single room.

- **Gender.** Men report somewhat higher overall happiness than women. This is consistent with the broader pattern of male respondents outscoring female respondents on nearly every question, though the overall happiness gap is slightly narrower than the average across the full questionnaire. The difference is modest in isolation but gains weight in the context of 28 out of 29 questions pointing the same direction.

- **Seniority.** Strategic and operational (middle) managers report the highest happiness, while executive leaders (excluding CEOs) report the lowest, which cuts against the assumption that happiness tracks the org chart upward. Entry-level employees and professional contributors sit in between. The executive dip is consistent with the wider C-suite pattern in the report: high accountability, constrained autonomy, and lower information flow combine to make the near-top of the organization a less happy place to be than the middle.

- **Tenure.** New employees are the happiest, before a steady decline at 5–10 years and a partial recovery for those with 10+ years of tenure. The drop from the honeymoon period to the mid-tenure trough is among the largest in the tenure data and reinforces the plateau narrative: by the time institutional familiarity has set in and the initial learning curve has flattened, happiness has eroded meaningfully The modest recovery for long-tenured employees suggests that those who stay past the trough find a new equilibrium, if never fully recapturing the early spark.

- **Work style.** Remote workers are the happiest group in the study, followed by hybrid, office, and finally, field-based employees. The gap between remote and field-based workers is one of the widest for any question across any lens, and every step closer to full location autonomy corresponds to higher levels of happiness. This is the cleanest finding in the work-style data and the foundation for the assertion that where people work has a more consistent effect on happiness than any other variable.

Productivity: How Teams are Perceived

GWHR

The survey measures productivity through the lens of the team rather than the individual.

This is a deliberate choice since self-reported individual productivity is one of the most reliably inflated measures in survey research. Most people rate themselves as productive regardless of context.

Asking about the team creates psychological distance for a more candid assessment. It also captures what organizations can actually influence. Individual output depends heavily on personal skill and effort, while team productivity depends on collaboration, communication, resources, and management quality.

Key drivers: *How productive do you feel your immediate team is?*

Top three drivers			Bottom three drivers		
Enjoyment of working with team	Collaboration	Being kept informed	Physical environment	Work-life balance	Ability to manage workload

The strongest predictor of perceived team productivity is team enjoyment, followed by the effectiveness of collaboration, inspiration, and information flow. The top of the list blends social and organizational dimensions: people feel their team is productive when they enjoy working together, when collaboration actually works, and when the organization keeps them informed and gives them a reason to care. Feeling valued, being listened to, and the amount of challenge in the role all cluster tightly, reinforcing that productivity as experienced by workers is a function of energy and environment, not bandwidth.

At the bottom, workload management is the single weakest predictor of productivity in line with being the weakest driver of any output in the entire key driver analysis. Work-life balance, physical environment, and feedback frequency sit just above it. The counterintuitive finding is that the variable most obviously connected to getting things done (whether you can manage the amount of work on your plate) has the least to do with whether you feel your team is productive.

Organizations chasing productivity through workload optimization or environmental upgrades may be pulling the least effective levers available to them.

The productivity driver profile is distinct from the others in that it's the only output where social dimensions rank at the very top. Team enjoyment and colleague energy both rank higher than they do for happiness, eNPS, or intent to remain. This makes sense as productivity is experienced collectively in a way that happiness and advocacy are not. But even here, the organizational dimensions run close behind. Inspiration, information flow, and feeling valued are all narrowly behind the top driver. The message is that productivity isn't purely related to team chemistry; it requires organizational context. A team that enjoys each other's company but lacks inspiration, information, or recognition won't sustain the feeling that they're doing meaningful, effective work.

Demographic splits

- **Age.** Perceived productivity is remarkably flat across the working lifespan, with the narrowest gap between generations of any question in the age data. People feel their team is roughly equally productive regardless of whether they're 25 or 65. This stability contrasts sharply with the U-shaped curves seen in happiness, trust, and inspiration, and suggests that productivity is experienced as a baseline condition of work rather than something that fluctuates with the emotional arc of a career.

- **Company size.** Perceived productivity rises steadily with company size. The gradient is gentler than for happiness or eNPS, suggesting that while enterprises outperform on team productivity, the advantage is more modest than in the emotional and cultural dimensions. Mid-size firms don't fall into a productivity trough the way they do on recognition, trust, and inspiration. People in this range feel their teams are somewhat less productive than their enterprise counterparts, but the gap is nowhere near as acute as the gaps in the dimensions that drive how they feel about the work.

- **Gender.** Men rate their team's productivity slightly higher than women. This is one of the narrower gender differences in the survey, and productivity is one of the few dimensions where the gap is small enough to be close to noise. Both genders feel their teams are getting things done.

- **Seniority.** Operational managers report the highest team productivity, followed by entry-level employees and professional contributors. Executive leaders give their teams the lowest productivity rating in the seniority spectrum. The executive dip is consistent with a pattern seen throughout the data: the wider C-suite (excluding CEOs) rates nearly everything lower, likely reflecting a vantage point where strategic gaps and organizational friction are more visible than they are from the middle of the org chart.

- **Tenure.** New employees rate team productivity highest before it settles to a near-flat line for everyone else. The honeymoon effect is present but slight, and the mid-tenure trough that shows up so dramatically in happiness and inspiration barely registers here. People stop feeling as happy and inspired well before they stop feeling productive, which reinforces the broader finding that organizations are sustaining output while allowing the emotional experience of work to erode underneath it.

- **Work style.** Remote workers report the highest team productivity, followed by hybrid, office, and field-based professionals. The gap between remote and field mirrors the pattern seen across nearly every dimension, but it carries particular weight here because productivity is one of the central arguments used to justify return-to-office mandates. The data says the opposite: employees with the most autonomy over where they work believe their teams are the most productive. Whether this reflects actual output or the felt experience is a fair question, but it challenges the assumption that proximity equals performance.

Take part in the 2027
Global Workplace Happiness Report

Intention to Remain: Capturing the Passive Middle

The survey measures intent to remain by asking how likely someone is to still be working at the organization in 12 months, rather than whether they are actively looking to leave. The framing matters. Asking "are you planning to leave?" forces a binary commitment that most people haven't made, and those who have may not want to say so in an employer-administered survey (even an anonymous one).

The 12-month horizon and the likelihood scale allow respondents to express degrees of uncertainty without declaring intent.

This approach captures the passive middle, the substantial share of the workforce that isn't heading for the door but isn't fully committed either, which a direct question about job-seeking would miss entirely. As the data shows, that passive group is often the most revealing segment.

They don't trigger alarm bells in exit data, but they represent a latent retention risk that could convert quickly if the labor market shifts or a better offer arrives.

Key drivers: *How likely are you to be working here in 12 months time?*

Top three drivers			Bottom three drivers		
Belonging	Inspiration	Values alignment	Enjoyment of working with team	Interaction with colleagues	Ability to manage workload

The strongest predictor of whether someone intends to remain with their employer is a sense of belonging, followed by inspiration, values alignment, and trust. The top drivers of intent to remain are almost entirely emotional, suggesting that people remain where they feel they're part of something that reflects who they are. Career progression, often assumed to be the primary lever for retention, sits in the middle of the pack rather than at the top. It matters, but not more than the foundational question of whether someone feels they belong.

At the bottom, workload management is once again the weakest predictor, and in this case it's the lowest driver score for any output in the entire analysis. Colleague energy, team enjoyment, and work-life balance sit just above it. You can like the people, handle the hours, and manage the volume, and still walk out the door.

The social and operational dimensions that make today tolerable do almost nothing to keep a hold of someone tomorrow.

What's most distinctive about the retention profile is how compressed the range is. Only a fraction of a point separates the strongest driver (belonging) from the weakest (workload), which is the narrowest spread of any output in the key driver analysis. This suggests that retention isn't driven by any single factor but by a cumulative sense of organizational fit. No one dimension keeps people; the compound effect of belonging, inspiration, trust, and feeling valued does. That makes retention harder to fix with a targeted intervention, such as a new career opportunity or a pay bump, and easier to damage by neglecting any one of these dimensions.

Demographic splits

- **Age.** Intention to remain rises steadily with age, and is one of the cleanest linear progressions in the survey. Unlike some other measures, which dip and recover, intent to remain simply accumulates. This likely reflects a combination of factors that compound over time: reduced labor market mobility, accumulated benefits, proximity to retirement, and a narrowing set of alternative career paths. The youngest workers aren't necessarily unhappy enough to leave, they simply have more options and less anchoring them to any single employer. The practical implication is that retention risk is highest where it's least visible: among younger workers whose scores look adequate but whose commitment is the lightest.

- **Company size.** Intention to remain rises with company size, but the spread is the narrowest of any output across the company-size lens. Unlike happiness or eNPS, where the mid-market trough is pronounced, intent to remain is relatively flat across size brackets. The mid-size firms that trail dramatically on inspiration, recognition, and trust don't trail by nearly as much on whether people plan to remain. This may be the most concerning finding in the company-size data: mid-market employees aren't leaving at significantly higher rates despite being meaningfully less happy. They may be staying for the same reasons women stay: not because the experience is good enough, but because the alternatives aren't obviously better.

- **Gender.** Women report a very slightly higher intention to remain than men, making this effectively the only question in the survey where the gender difference is negligible.

- **Seniority.** Operational managers report the highest intention to remain, while executive leaders report the lowest, in a gap that is the widest in the seniority data for this question. The executive dip is consistent with the broader C-suite pattern in the report: lower happiness, lower work-life balance, lower information flow, and now lower intent to remain. Professional contributors and entry-level employees sit in the middle, suggesting that the sweet spot for retention is the management layer – the same group that reports the highest happiness and engagement scores across the board. The people most likely to leave are at the very top and the very bottom, for very different reasons.

- **Tenure.** Intention to remain follows a distinctive pattern: it starts moderately high for new employees, dips during the 2–5 year bracket, then rises steadily to its peak at 10+ years. The mid-tenure dip aligns with the broader trough seen in happiness and inspiration, but the recovery is much stronger here with the highest intent to remain score for any tenure bracket by a clear margin. Long-tenured employees may have lower eNPS and lower inspiration, but they plan to stay.

- **Work style.** Remote workers report the highest intention to remain, followed by hybrid, office, and field-based professionals. The hierarchy is consistent with every other output, but the gaps here are narrower than for happiness or productivity. This suggests that while work style has a strong influence on how people feel day to day, its effect on whether they actually plan to leave is more modest.

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eNPS: A Higher Threshold Than Satisfaction

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The Employee Net Promoter Score asks whether someone would recommend their employer to a friend or relative. This question was borrowed from customer experience research, where it has a long track record as a predictor of loyalty and growth.

Its power lies in the personal stakes. Unlike satisfaction questions, which ask how you feel, eNPS asks whether you'd put your reputation on the line.

Recommending an employer to someone you know is an act of personal endorsement with social consequences because if the experience is bad, it reflects poorly on you. That higher threshold is what makes eNPS one of the most discriminating measures in the survey: it separates the merely satisfied from the genuinely committed. It also explains why eNPS can be negative even in organizations where most other scores are healthy. Liking your job and being willing to vouch for your employer are very different things.

Key drivers: *How likely are you to recommend working here to a friend or relative?*

Top three drivers			Bottom three drivers		
Values alignment	Inspiration	Belonging	Interaction with colleagues	Clarity of job requirements	Ability to manage workload

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The strongest predictors of whether someone will recommend their employer are values alignment and inspiration, belonging, and trust. These are the most identity-driven dimensions in the survey, reflecting not just whether someone is satisfied at work but whether they see themselves in the organization. Feeling valued and being listened to follow closely. The top of the eNPS driver list reads like a checklist of emotional investment: do I share this organization's values, does it inspire me, do I belong here, and do I trust it?

At the bottom, workload management, job requirements clarity, and colleague energy are the weakest predictors.

Team enjoyment lands surprisingly low for a question about recommending your workplace to a friend. You can genuinely like the people you work with and still not put your name behind the organization. This makes sense if one views advocacy as a public act of personal endorsement. People are selective about what they attach their reputation to.

The eNPS driver profile carries the widest spread of any output in the analysis. This means the dimensions that matter to advocacy are more sharply differentiated from those that don't, making eNPS the most emotionally selective outcome in the survey.

Demographic splits

- **Age.** Willingness to recommend follows a shallow U-shape, dropping from 19–29 to its lowest point for those between 50–59 before recovering for those 60+. The late-career dip means that the workers with the most institutional knowledge and the most credibility as advocates are the least likely to recommend their employer. The 60+ recovery may reflect a survivorship effect: those who stay into their 60s have largely self-selected into organizations they feel good about.

- **Company size.** eNPS follows the same gradient as other outputs, generally following the growth curve, except that micro-businesses sit below the midpoint. Small companies may generate belonging and collaboration, but they don't necessarily have the stable qualities that make someone willing to put their reputation behind the employer. Enterprise-scale organizations, with their investment in brand, culture, and formal infrastructure, are producing advocacy that smaller firms can't match, and the gap opens up well before the mid-market.

- **Gender.** Men are more likely to recommend their employer than women. This is consistent with the broader patterns around gender but takes on additional weight in the context of eNPS, because advocacy is discretionary in a way that most workplace behaviors are not. No one is required to recommend their employer. The fact that women are consistently less willing to do so, despite near-identical intentions to remain, suggests that retention and advocacy are driven by different things.

- **Seniority.** Conforming to the familiar pattern within the seniority lens, strategic and operational managers are the most likely to recommend, while executive leaders are the least, contributing to the widest gap in the seniority data. Entry-level employees and professional contributors sit between.

- **Tenure.** eNPS declines steadily with tenure, with one of the steepest tenure gradients in the entire survey. This is the inverse of the retention pattern, where 10+ year employees post the highest intention to remain. Long-tenured workers are the most committed to remaining and the least willing to advocate. They've made their peace with the organization without feeling compelled to sell it. This "loyalty without advocacy" pattern may be the single most actionable finding in the tenure data: the employees with the deepest institutional knowledge and the longest relationships are the least likely to be vocal ambassadors. Organizations that take their veteran workforce for granted by providing less feedback, fewer development opportunities, and less visible recognition, as the data elsewhere suggests, are turning their most loyal cohort into their quietest.

- **Work style.** eNPS follows the work style pattern, with remote workers the most likely to recommend their employer, and so on. But the gap in advocacy between remote and field-based workers is one of the widest for any question across any lens in the survey, and the spread makes eNPS one of the dimensions most sensitive to location autonomy. This reinforces a finding from the key driver analysis: advocacy is an identity-driven act, and remote workers, who report the highest scores on freedom, belonging, values alignment, and trust, have the strongest emotional foundation for putting their name behind their employer. Office workers, who sit in the middle on most dimensions, are also in the middle on advocacy.

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Global Workplace Happiness Report

Fairly Rewarded: It's Not Just the Money

The survey asks whether people feel fairly rewarded for the work they do, explicitly referencing pay, benefits, and incentives. The word "fairly" is doing the heavy lifting.

The question doesn't ask whether compensation is high or low, simply whether it feels proportionate. That distinction matters because fairness is a relative judgment, filtered through everything else the employee experiences.

Someone who sees a future, feels recognized, and believes in what the organization stands for is significantly more likely to say their compensation is fair than someone on the same salary who feels stuck and invisible. This makes the question a barometer of the broader employment relationship rather than a proxy for payroll benchmarking. When scores are low, the instinct is to look at the compensation structure. The data suggests looking first at whether people feel they're going somewhere and whether their efforts to get this far have received any recognition.

Key drivers: *How fairly rewarded are you for the work that you do?*

Top three drivers			Bottom three drivers		
Opportunity to progress	Inspiration	Feeling valued	Clarity of job requirements	Interaction with colleagues	Ability to manage workload

The strongest predictor of whether someone feels fairly rewarded is career progression, followed by inspiration, and feeling valued. Learning opportunities, information flow, and being listened to follow closely. The top of this driver list describes a person who sees a future, feels inspired by where they work, and believes their contribution is noticed, and that person is far more likely to say they're fairly compensated than someone who lacks those things but earns the same salary. The "fairly rewarded" driver profile is the most future-oriented in the analysis: it's the only output where career progression ranks first.

At the bottom, workload management is again the weakest predictor, the same ranking it occupies across every output. Colleague energy and job clarity, team enjoyment, and the link between role and organizational success round out the lowest tier.

The pattern is now familiar, but the implication here is sharper than for other outputs, because compensation is the one area where organizations assume the fix is mechanical. The data suggests otherwise. An employee who feels stuck, uninspired, and invisible is far more likely to feel underpaid than one doing the same job for the same salary who sees a path forward and feels their work is recognized. This doesn't mean pay doesn't matter; the question specifically asks about pay, benefits, and incentives, and the overall score is among the lowest in the survey. But it means that dissatisfaction with compensation is filtered through the broader relationship with the organization. For some employees, "I'm not fairly rewarded" may be the language they reach for when the real issue is "I don't see where this is going" or "nobody notices what I do."

Demographic splits

- **Age.** The sense of being fairly rewarded is essentially flat across the core working years from age 19 through 59, before jumping for those 60+. The late-career uptick is the most distinctive feature of this profile. Unlike happiness or inspiration, which follow a gradual U-shape, fair reward barely moves for four decades and then steps up at the end. One reading is that older workers have either negotiated their way to compensation they're comfortable with or have recalibrated their expectations. Another is that the 60+ cohort has self-selected – those who felt chronically underpaid may have left long ago, and the ones who remain are the ones who made their peace.

- **Company size.** Employees at the largest firms feel most fairly rewarded, while those at mid-size companies feel least fairly rewarded. Micro-businesses outperform the mid-tier despite presumably having fewer resources for compensation and benefits, which reinforces the key driver finding: feeling fairly rewarded has more to do with visibility, growth, and recognition than with the size of the payroll. Mid-size firms that can't compete on salary with enterprises can potentially compete on the dimensions that actually shape the perception of fairness: career progression, inspiration, and making people feel their contribution is noticed.

- **Gender.** Men feel more fairly rewarded than women, reflecting one of the larger gender differences in the survey. This is likely to be a composite signal. Part of it may reflect actual pay gaps. But given the key driver analysis, which shows career progression, inspiration, and feeling valued as the strongest predictors of feeling fairly rewarded, part of it almost certainly reflects the same cultural deficits that run through the rest of the gender data. Women who feel less recognized, less inspired, and less certain about their career trajectory will perceive the same compensation as less fair. The pay gap and the recognition gap appear to reinforce each other.

- **Seniority.** Operational managers feel most fairly rewarded, followed by strategic managers and executive leaders, who sit level with entry-level employees and below their own direct reports. Professional contributors score lowest. At senior levels, compensation expectations scale with accountability, and the key driver analysis suggests the issue isn't just a number.

- **Tenure.** New employees feel most fairly rewarded before a sharp drop at 2–5 years, where it effectively flatlines through 10+ years. The honeymoon-to-plateau drop is one of the steepest tenure gradients in the survey, and unlike happiness or retention, there's no recovery for long-tenured employees. The implication is that the sense of fair reward is set early and erodes fast. The first two years presumably benefit from the glow of a new salary, a fresh benefits package, and the absence of a comparison baseline.

- **Work style.** Remote workers feel most fairly rewarded, followed by hybrid, office, and field-based professionals, suggesting that the flexibility dividend contributes to remote workers' concept of total compensation.

Take part in the 2027 Global Workplace Happiness Report

Paul Dolan is Professor of Behavioural Science in the Department of Psychological and Behavioural Science at the London School of Economics and Political Science and the author of Happiness by Design*,* Beliefism*, and* Happy Ever After.[36]

Of all the things that matter to you, feeling good is surely right up there. You might be motivated by fame, fortune or family, but rarely as ends in themselves; rather, for the happiness that reputation, riches, or relationships bring. We can feel good in myriad ways.

When it comes to work, we might not all want pleasurable jobs but most of us, in one way or another, would like to experience purpose from the work that we do. Even those who might think they're only in it for fame or fortune are more likely to quit a job that doesn't feel worthwhile.

Happiness at work is not only good for individuals, it's also good for all those outcomes that employers care about beyond how their employees feel. Happier workers are more productive and take less time off sick. They are more pro-social, they contribute more towards a good culture in the workplace, and to the happiness of their colleagues. So even if you're a hard-nosed employer who cares only about the bottom line, your profits will be higher if your staff are happier.

Happiness at work is frequently treated in much the same way as exercising or eating vegetables: everyone agrees it's important, few people want to do it properly, and most organisations do very little that works in improving it. Given the countless hours we spend at work, travelling to and from work, and thinking about work late at night or on the weekends, happiness at work should go beyond yoga classes, or whatever, to tick some boxes. It is about creating workplace environments for long-lasting experiences of purpose.

Most of the ways to improve happiness in work, as elsewhere, are obvious but, as elsewhere, the obvious is invariably overlooked. We are all aware of the benefits of good communication, for example, which apply as much to happy workplaces as to happy marriages. And yet employers frequently fail to provide employees with timely, salient, and constructive feedback. And employees often feel that they cannot speak to their employers when they notice an issue that needs addressing. An honest conversation about how to embed more honest conversations in your workplace could be a good place to start.

Many of the most effective – and straightforward – workplace interventions to promote purpose and productivity will focus on relational aspects. An appreciation of a colleague's efforts. A timely and genuine "thank you" for their work. Making them a cup of tea from time to time if you're in the office. Small acts of kindness like these can have the biggest effects. Several studies demonstrate the benefits of kindness for both the giver and the recipient. When employees experience kindness from their colleagues and managers, it promotes a sense of psychological safety and belonging.

A sense of belonging is a fundamental determinant of pleasure, purpose, and productivity. We are happier and work harder when we feel that we are in it together with our colleagues.

There are some universal determinants of happiness that can be used to garner not only a sense of belonging but also to open our minds to different perspectives and ideas.

Managers can use humour, for example, to reduce stress and increase group cohesion. Affiliative humour, involving sharing jokes, funny stories, and witty banter, has been shown to be particularly effective.

None of these things, no matter how small, will start to happen by themselves. They need to be designed into the fabric of the workplace. Managers must lead by example. It is worth noting that the physical layout of a workplace can also impact upon how happy and productive we are. Crowded and hectic environments diminish our capacity to notice and respond to the needs of others, leading to a decrease in happiness, kindness, and connection. Conversely, spaces that foster a sense of calm, and encourage positive social interactions, enhance positive outcomes.

Many people now work from home, of course. The flexibility that this provides can be a source of happiness, on top of the pleasure from not losing any time stuck in a traffic jam, or on a crowded bus or tube. But only up to a point. Weeks on end at home quietly erode purpose, which comes from feeling useful, connected, and part of something larger than yourself. We are social animals who benefit enormously from the small, informal interactions that Zoom cannot create. Moreover, the best ideas will often be generated outside of formal meetings, so productivity suffers too.

To improve both happiness and productivity, my tip for employers is to ask their employees to come into the office one day a week more than they want to. This won't work everywhere of course, and each employer needs to determine what works in making for happy workers and workplaces, ideally using an iterative test-and-learn approach.

Whatever firms do, increased happiness will be found in the small things that happen day to day and not in the grand narratives pertaining to mission statements, visions, and the like.

Having said that, creating a convincing narrative around the importance of happiness at work is a precursor to improving it. So is measurement. Gallup has been at the forefront of measuring happiness at work, shaping the landscape for workplace wellbeing for the past 90 years.

While The Happiness Index has only been around for a decade, it is already providing more finely grained insights into the determinants of workplace wellbeing that build on the relational aspects discussed here. These efforts should serve to make all of us that little bit happier.

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References

[36]Paul Dolan, Happiness by Design, Penguin Books, 2015; Beliefism, The Bridge Street Press, 2025; Happy Ever After, Allen Lane, 2019

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Global Workplace Happiness Report

The Neuroscience Themes at Work

GWHR
2026

The Happiness Index: Converting culture into business performance

1. Benchmarking your organisation: *Not sure how your culture stacks up?*
Our global benchmark compares your organisation against tens of millions of cultural insights from organisations around the world. Discover your strengths and uncover key focus areas for cultural improvement.

2. Employee engagement platform: *Curious how your people think, feel, and behave?*
Our engagement platform gives a live view of your cultural health. Use research-backed surveys or create your own, then explore insights to see what really drives engagement at every stage of the employee journey.

3. Culture consultancy: *Unsure what's driving impact or where to focus?*
Our consultants turn insights into action. We help you build a culture that boosts performance — from revenue and profit to customer retention. Wherever you want to see results, we help you get there faster.

The Happiness Index

Neuroscience at Work

GWHR

Neuroscience shows that the brain and body are deeply connected: emotions affect physical health and our environment shapes how we feel. We embrace this holistic view, which recognizes that culture, safety, and meaning at work directly influence wellbeing and performance.

The Global Workplace Happiness Report is based on The Happiness Index questionnaire, a psychographic tool which has been in use since 2014 and was updated in 2025. It uses neuroscience to understand how people think, feel, and behave at work.

Its goal is to help organizations create cultures where employees can thrive by grounding cultural and engagement insights in how the human brain actually works.

The questionnaire is based on a model that organizes human behavior into the two areas of **Happiness** and **Engagement**, examining them via four key brain systems, each linked to core workplace needs.
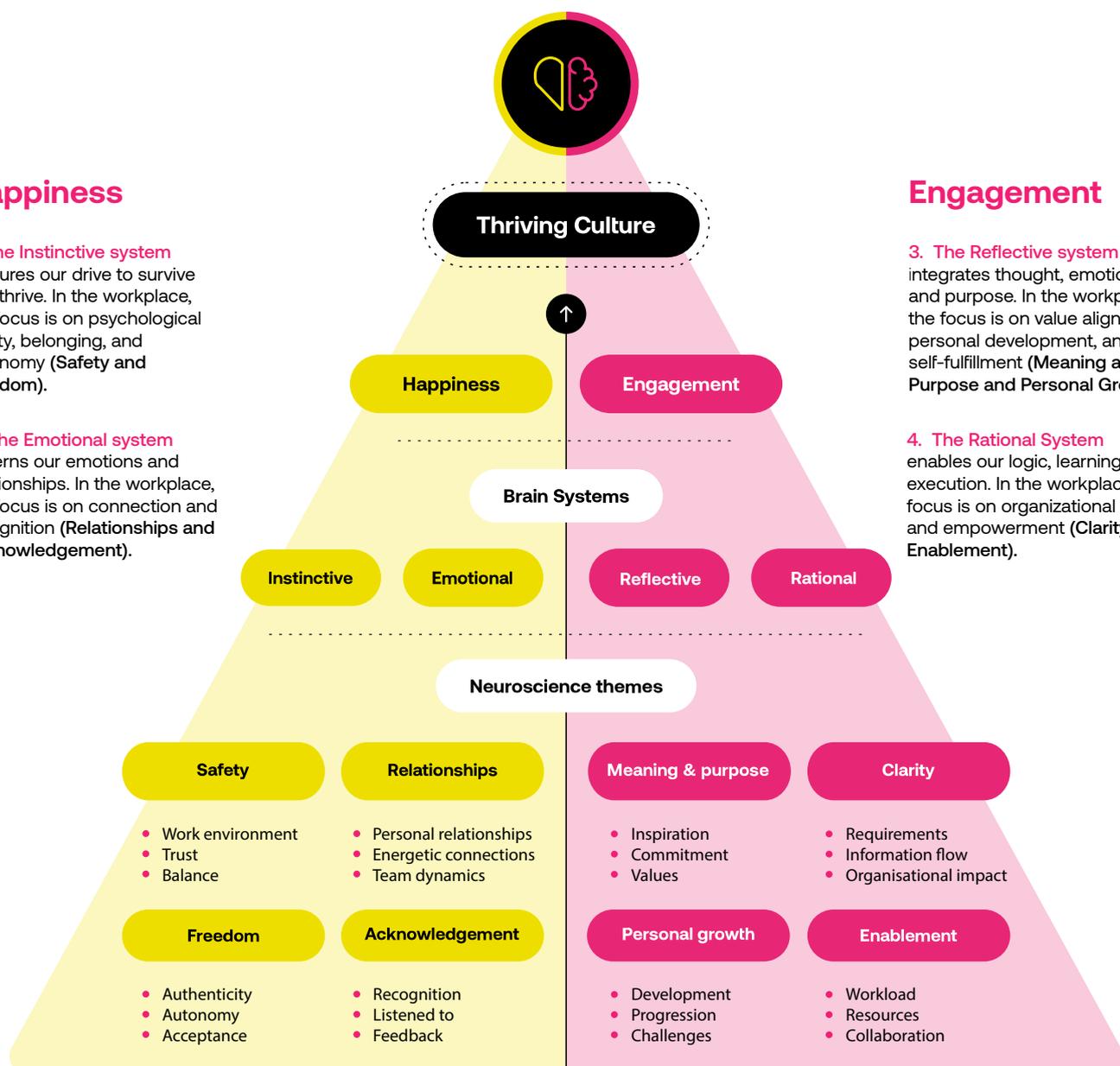
Happiness

1. The Instinctive system captures our drive to survive and thrive. In the workplace, the focus is on psychological safety, belonging, and autonomy (**Safety and Freedom**).

2. The Emotional system governs our emotions and relationships. In the workplace, the focus is on connection and recognition (**Relationships and Acknowledgement**).

Engagement

3. The Reflective system integrates thought, emotion and purpose. In the workplace, the focus is on value alignment, personal development, and self-fulfillment (**Meaning and Purpose and Personal Growth**).

4. The Rational System enables our logic, learning, and execution. In the workplace, the focus is on organizational clarity and empowerment (**Clarity and Enablement**).

Thriving Culture

Happiness | **Engagement**

Brain Systems

Instinctive | **Emotional** | **Reflective** | **Rational**

Neuroscience themes

Safety
- Work environment
- Trust
- Balance

Relationships
- Personal relationships
- Energetic connections
- Team dynamics

Meaning & purpose
- Inspiration
- Commitment
- Values

Clarity
- Requirements
- Information flow
- Organisational impact

Freedom
- Authenticity
- Autonomy
- Acceptance

Acknowledgement
- Recognition
- Listened to
- Feedback

Personal growth
- Development
- Progression
- Challenges

Enablement
- Workload
- Resources
- Collaboration

Safety

A word cloud of this report would rain the phrase "psychological safety." It captures essential elements of the relationship between a worker and their organization and is a prerequisite for vital qualities, including resilience under pressure and the ability to innovate.

Safety sits on the Happiness side of the neuroscientific model. It looks at the Instinctive area of the brain, which is concerned with our genetically programmed responses to the environment. It is our most basic instinct and we depend on a feeling of safety to be our true selves on the job, to take risks and keep work-related stress at bay.

The Global Workplace Happiness Survey explores safety with three questions:

1. How much do you trust your organisation?
2. How satisfied are you with the balance between your work and home life?
3. How satisfied are you with the physical environment you work in?

Based on over 245,000 data points, the findings reveal that while employees are largely satisfied, there are clear areas for improvement.

	How much do you trust your organisation?	How satisfied are you with the balance between your work and home life?	How satisfied are you with the physical environment you work in?
Seniority			
Executive leadership	7.2	7	7.4
Strategic management	7.5	7.2	7.7
Operational management	7.3	7.1	7.8
Professional/Specialised contributors	7.2	7.1	7.5
Entry level	7.3	7.1	7.6
Tenure			
0-2 years	7.5	7.3	7.7
2-5 years	7.3	7.2	7.6
5-10 years	7.2	7.0	7.4
10+ years	7.3	7.1	7.5
Work style			
Field-based	6.9	6.6	7.0
Office	7.2	6.9	7.4
Hybrid	7.4	7.4	7.7
Remote	7.5	7.7	8.2
Gender			
Female	7.1	6.8	7.3
Male	7.3	7.0	7.5
Age			
19 - 29	6.8	6.5	7.2
30 - 39	7.0	6.7	7.3
40 - 49	7.2	6.9	7.4
50 - 59	7.2	7.1	7.4
60+	7.5	7.4	7.6
Company size			
10 and under	7.4	6.6	7.1
11-50	7.0	6.6	7.1
51-250	6.9	6.7	7.2
251-1000	7.0	7.2	7.4
1000 +	7.5	7.3	7.7

- **Trust** correlates with overall happiness and eNPS, placing it in the upper half of drivers for both. It's not the top predictor of anything, but it's consistently in the conversation. It functions as connective tissue between the dimensions that do lead: belonging, inspiration, and feeling valued all implicitly require trust to operate.
- **Work-life balance** received the lowest score in the area. The results imply that regardless of improvements around where employees work in hybrid models, companies are still struggling with the when and in establishing a healthy balance around how much professional demand encroaches on personal life
- **Physical environment** is a hygiene factor for most respondents. Analysis of key drivers shows that the physical environment has a low correlation with overall happiness, productivity, and collaboration. It sits near the bottom of the driver rankings for every output. It's noticed when it's bad, invisible when it's adequate, and barely matters to the outcomes organizations care most about.

Themes from comment analysis

The concept of Safety is the baseline from which all other dimensions operate. When our safety needs are unmet, the brain remains in a threat-response mode that crowds out the capacity for creativity, collaboration, and risk-taking. The global employee comments reveal that while most workers feel physically and professionally secure, the erosion of trust and the strain on work-life boundaries represent fault lines that cut across industries, seniority levels, and geographies.

The comment analysis surfaces a crisis of trust directed at executive leadership, concentrated in highly skilled roles in developed economies, and driven by poorly communicated layoffs, restructuring, and return-to-office mandates. This theme hits hardest in the 2–5 year tenure bracket, potentially people who joined during or after the pandemic expecting one culture and now experiencing another. The contrast between what organizations say and what they do is the most frequently cited factor eroding trust.

I do not trust [the company], because there seems to be a big difference between what head office say and what they do. Lots of their statements are focused around listening to staff... while their decisions seem to be more focused around protecting themselves.

(Other, Manufacturing, UK)

Individual comments reinforce the data: the ability to work flexibly or in a hybrid capacity is frequently cited as the ultimate driver of work-life balance and psychological safety. This theme is highly prominent in the comments among females and employees in the 30–49 age range. For working parents and caregivers, the removal of the daily commute and the autonomy to manage their own schedules reduces daily stress, directly fulfilling their instinctive need for environmental control and stability.

I really enjoy the hybrid working approach and flexibility with working hours, making work-life balance so easy and satisfactory, definitely a key element of why I like working at [the company] and sets it apart from competitors.

(Female, Finance, Phillipines)

A strong theme of pride emerged among employees who feel a deep connection to their company's mission. This trend skews toward long-tenured employees (10+ years), older demographics (50+), and those in purpose-driven sectors like Education, Healthcare, and specialized Consulting. For these individuals, emotional safety is derived from a sense of belonging, loyalty, and the belief that their work positively impacts others.

I have been working for this company for 15 years, and it is the best place I've ever worked. I have learned a lot here and continue to grow every day. I go to work with a smile on my face every single day.

(Hospitality, 1,000+ employees)

Demographic splits

- **Age:** There's a U-shaped curve in Safety based on employees' age. The 19–29 age bracket recorded the lowest scores for organizational trust and work-life balance. As employees progress through their careers, scores steadily climb. Safety scores plateau for those in their 40s and 50s, eventually peaking with the 60+ demographic.

- **Company size:** Larger organizations tend to achieve higher Safety scores across the board. Smaller organisations face distinct challenges. While trust is relatively high in micro-businesses with 10 or fewer members of staff, these employees report the lowest work-life balance score in the entire study. This suggests that the intimacy of a small team often comes at the cost of personal time.

- **Mid-sized firms** (51–250 employees) report the lowest trust levels. Overall, the data indicates that as companies scale, they are better able to implement the formal structures and infrastructure necessary to support both a high-quality physical workspace and a more sustainable work-life balance.

- **Gender:** Analysis reveals the same persistent gender gap in workplace Safety as in other measures. The most significant disparity appears in work-life balance, suggesting that professional and domestic pressures may still fall disproportionately on female employees.

- **Seniority:** The Safety data for seniority levels highlights the surprising "inverse peak" at the very top of the hierarchy. While middle management reports the highest overall Safety scores and the strongest organizational trust, executive leadership (excluding CEOs) registers the lowest trust levels in the study. Across the entire spectrum, work-life balance remains the primary pain point.

- **Tenure:** The results reveal a distinct "honeymoon effect" followed by a mid-career slump as employee tenure increases. New hires (0–2 years) report the highest levels of Safety across all metrics, with peak levels of organizational trust.

However, the level of Safety steadily erodes, reaching its lowest point among employees with 5–10 years of service. This mid-tenure trough is most evident in work-life balance, indicating that as staff become more integrated and take on greater responsibilities, the pressure on their personal life increases. Safety eventually stabilizes for those with 10+ years of seniority.

- **Work style:** The results highlight a clear benefit to flexibility, with remote and hybrid work significantly outperforming traditional office and field-based roles. Remote workers report the highest overall Safety scores, excelling particularly in satisfaction with their physical environment and work-life balance. This suggests that autonomy over one's workspace and schedule is a primary driver of workplace wellbeing.

In stark contrast, field-based employees report the lowest scores across every question in the survey, especially work-life balance. Office-bound staff occupy the middle ground, hampered by lower balance scores than their flexible counterparts. The results indicate a widening gap between those who enjoy the benefits of modern flexible arrangements and those in rigid or mobile roles who feel disconnected from organizational trust and personal time.

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Global Workplace Happiness Report

Designing Safety That Performs
Spotlight: Andrea D. Carter

Andrea D. Carter is a researcher and organizational scientist, a workplace belonging expert, and adjunct professor at Adler University. She leads Andrea Carter Consulting and is the founder of Belonging First.

Every organization wants speed, quality, innovation, and performance. Every organization also runs into friction: people disagree, priorities compete, perspectives collide, and progress stalls. Many respond by adding more process, control, or hierarchy. But friction itself is not the issue. The deeper problem is what happens when teams do not have the relational and behavioural infrastructure to move through friction well. Gallup's 2025 workplace research shows how often organizations can appear functional on the surface while struggling underneath. underneath.[37]

The Happiness Index data confirms what researchers have long understood: people perform better when they feel secure, trusted, and balanced. Edmondson and Bransby's review of 185 studies across 39 countries reinforces this, showing that psychological safety supports performance, learning, creativity, and voice.[38] Safety matters because it reduces social threat, and when teams feel safe, they perform better. But safety, measured in isolation, does not tell organizations what to build when friction stalls progress.[39]

Safety is essential, but it cannot carry the full load of what today's workplaces demand, especially when tension, competing interests, and pressure test how people actually work together.

This is where belonging infrastructure enters. My research identified five neurological belonging indicators – comfort, connection, contribution, psychological safety, and wellbeing – that shape the nervous system's capacity to operate under pressure.[40] These are not categories of culture. They are the behavioural infrastructure of belonging, grounded in neuroscience and reflected in how people think, respond, and perform.

Comfort reduces threat through clarity and predictability. Connection creates trust and reciprocity. Contribution reinforces that effort has visible value. Psychological safety supports honest voice, learning, and risk-taking. Wellbeing protects recovery capacity. Together, these indicators form an interdependent system. When one weakens, behavior shifts toward self-protection, trust erodes, and executive functioning suffers. When all five are present, people are better able to think clearly, contribute fully, stay engaged through difficulty, and operate under pressure.[41] Coan's Social Baseline Theory helps explain why: belonging reduces the social energy required to function, leaving more capacity available for the work itself.[42]

This matters most during friction and conflict, where teams either accelerate or stall. The five-indicator model shows that psychological safety works best when reinforced by the other four indicators. Comfort creates clarity and predictability, which preserve executive functioning by diminishing perceived threat. Connection builds the trust and reciprocity needed to keep working through differences. Contribution confirms that effort has value and a visible impact, sustaining motivation. Wellbeing protects the recovery capacity required to keep showing up.

Together, the five indicators keep safety from collapsing into passivity and instead turn friction into movement, learning, accountability, and better outcomes.[43,44]

Real belonging demands navigating difference, repairing conflict, and enduring mutual need.[45] These are inconvenient. They are also non-negotiable. You cannot automate interdependence, and you cannot skip friction and still get belonging.

Belonging infrastructure does not compete with happiness; it supports it. Belonging infrastructure provides the system through which safety, engagement, and ongoing performance become designable outcomes rather than aspirational ones. Because belonging is measurable, it is fixable. And because it is fixable, it becomes a competitive advantage. For a 10,000-person company, that advantage is worth $52 million a year in recovered productivity alone.[44]

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Relationships

Whether it's early Monday morning or a project that stretches into the night, our colleagues make it easier to press on and maintain a sense of humor about it. Many of us spend more time with coworkers than with family members or friends, so those relationships are vitally important, if unmeasured by employers.

Relationships sit within the Happiness side of the model. They stem from the Emotional area of the brain, which is focused on our responses to other people. It's these responses which affect how we think about our relationships with others.

The Global Workplace Happiness Survey explores safety with three questions:

1. How satisfied are you with the relationship you have with your line manager?
2. To what extent do your interactions with colleagues boost your own energy and motivation at work?
3. How much do you enjoy working with your team?

Based on over 230,000 data points, the Relationships theme achieves the highest global average across the neuroscientific lenses.

	How much do you enjoy working with your team?	How satisfied are you with the relationship you have with your line manager?	To what extent do your interactions with colleagues boost your own energy and motivation at work?
Seniority			
Executive leadership	7.7	7.3	7.5
Strategic management	8.1	7.7	7.9
Operational management	8.2	7.9	8.1
Professional/Specialised contributors	7.7	7.5	7.5
Entry level	7.7	7.5	7.6
Tenure			
0-2 years	8.1	7.9	8.1
2-5 years	7.9	7.7	7.9
5-10 years	7.7	7.4	7.6
10+ years	7.7	7.4	7.6
Work style			
Field-based	7.4	7.0	7.2
Office	7.6	7.3	7.4
Hybrid	7.9	7.6	7.7
Remote	7.9	7.8	7.7
Gender			
Female	7.6	7.4	7.7
Male	7.8	7.6	7.8
Age			
19 - 29	7.5	7.4	7.7
30 - 39	7.6	7.5	7.7
40 - 49	7.7	7.4	7.6
50 - 59	7.6	7.3	7.4
60+	7.9	7.6	7.8
Company size			
10 and under	7.4	7.4	7.5
11-50	7.3	7.2	7.4
51-250	7.5	7.3	7.5
251-1000	7.9	7.7	8.0
1000 +	8.1	7.9	8.2

- **Line manager satisfaction** scores predictably but notably lower than both team enjoyment and colleague energy. Of the three Relationships questions, the manager relationship carries the most variance across the dataset and is the most sensitive to context. It's also the most organizationally actionable: team chemistry is hard to engineer, but manager capability can be trained, supported, and measured. In the key driver analysis, line manager satisfaction correlates more strongly with happiness than team enjoyment does, suggesting that while people draw comfort from their peers, the manager relationship has a larger influence on their overall experience.

- **Colleague energy** scores level with team enjoyment, jointly highest of the three Relationships questions. People overwhelmingly report that their colleagues lift them up. But this is the question with the sharpest gap between sentiment and influence. In the key driver analysis, interaction with colleagues ranks 21st out of 23 as a predictor of overall happiness, and also sits in the bottom three for intent to remain and perception of pay fairness. It is, by a clear margin, the least consequential Relationships variable across every outcome measured. The implication is that colleague energy functions as a comfort, not a catalyst.

- **Team enjoyment** is tied with colleague energy as the highest of the three Relationships questions. It is, on the surface, a uniformly positive measure and a powerful driver for productivity, ranking first out of 23 variables. People who enjoy their team believe it delivers. But for intent to remain, it drops into the bottom three alongside colleague energy and workload management. For happiness, it lands in the middle of the pack rather than at either extreme. The pattern suggests that team enjoyment is task-facing: it shapes how people experience the work in front of them, but has little bearing on whether they see a future in the organization.

Themes from comment analysis

The analysis of global employee comments within the neuroscience theme of Relationships reveals that workplace connections are a profound double-edged sword, serving as both the greatest source of workplace happiness and the primary driver of emotional exhaustion.

A prevailing trend across the dataset is the difference between micro and macro relationships: employees overwhelmingly cherish their immediate peers, often describing them as a "second family" or a vital support system that makes demanding jobs bearable. This camaraderie fosters resilience, particularly in high-pressure industries like Healthcare, Hospitality, and Food & Beverage.

> *Honestly, the people I work with are the reason I've stayed in this job... my colleagues have been there for each other in ways the organisation hasn't, and I'm genuinely grateful for that.*
> *(Female, 30–39, Other Industry)*

Conversely, systemic relationship breakdowns occur at the macro level. Employees frequently report feelings of alienation from senior leadership, citing toxic management practices, rampant favoritism, and a distinct lack of psychological safety when raising concerns. Demographically, the data highlights that frontline workers and those in non-managerial roles rely heavily on peer-to-peer bonds to navigate workplace stress, whereas mid-level supervisors and specialists express deep frustration over unequal workloads and unaccountable team members.

> *I do not get along with management... When we have issues on the floor, instead of helping find a solution, their immediate reaction is to blame people. It is a severely toxic environment.*
> *(Female, Healthcare, Supervisor, US)*

Furthermore, company size plays a critical role; employees in large enterprises (1000+ headcount) frequently suffer from cross-departmental silos, experiencing an "us versus them" mentality between operations and head office, or between different functional teams. Remote and hybrid workers also note the challenge of building organic connections outside their immediate teams. Ultimately, while localized teamwork is a thriving asset that contributes to high scores at the enterprise level, organizations have an opportunity to bridge departmental divides, train empathetic leaders, and enforce equitable accountability to cultivate a truly cohesive global workplace.

A real difference between commercial teams and product and tech teams... like different companies.

(Female, 50–59, Technology, Netherlands)

Demographic splits

- **Age.** Relationship satisfaction follows the mid-career dip, with younger and older workers reporting the strongest interpersonal connections and the 50s cohort hitting the lowest point in the dataset. The decline is concentrated in the manager relationship rather than peer bonds, suggesting that as careers lengthen, the vertical relationship frays while horizontal ones hold. The rebound after 60 implies that those who stay past the trough either resolve the friction or stop expecting the manager relationship to carry the same weight.

- **Gender.** Men report the highest relationship satisfaction across all three questions, with women scoring slightly but consistently lower – particularly on team dynamics and line manager quality rather than colleague energy.

- **Company size.** Relationship scores climb steadily with organizational scale, with the largest firms recording the highest marks in every interpersonal dimension. The effect is most pronounced on colleague energy, where the gap between the smallest and largest employers is wider than for any other Relationships question. Manager satisfaction, by contrast, remains relatively flat regardless of size. Scale amplifies peer culture more than it improves management quality. Larger organizations aren't necessarily better led, but they do support more social momentum.

- **Seniority.** Relationships follow a bell curve across the hierarchy, peaking at operational management and tapering at both ends. Mid-level managers report the highest team enjoyment and the strongest colleague energy in the study, positioning them as the social engine of the organization. Executive leaders and specialist individual contributors share the lowest scores, though for different reasons – executives report the most friction with their own line managers, while contributors appear to sit outside the team-based energy loop altogether.

- **Tenure.** Relationship satisfaction starts high and erodes steadily, following a honeymoon-to-plateau trajectory. New hires report the strongest scores across all three questions, with the sharpest decline occurring in the manager relationship as tenure increases. Peer-level energy holds up better over time but still fades. The pattern suggests that organizations are effective at building early social bonds but struggle to maintain or deepen them, particularly on the vertical axis where the manager-employee connection gradually loses its initial quality.

- **Work style.** Remote and hybrid workers report the highest relationship scores in the study, outperforming their office-based and field-based counterparts on every measure. Field-based employees sit at the bottom, with the widest gap appearing in manager satisfaction. The finding challenges the assumption that physical proximity drives connection – deliberate, structured interaction in remote settings currently appears to foster stronger bonds than the passive co-location of the office or the isolation of the field.

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Relationships in the Workplace: Making Connections

Spotlight: Dr Shannon Hirst, Jimi Odell, and Verity Glasgow; OnePlusOne

GWHR

Strong relationships are essential for a healthy, happy life. For 87 years and counting, The Harvard Study of Adult Development has found that good quality relationships keep us healthier and happier and help us live longer – more than career achievement, more than exercise, more than diet. Other studies have found relationship quality to be as impactful on our longevity as smoking and drinking, and more impactful than obesity and physical activity.[47]

These aren't just the relationships we have with our partners, family members, or friends – all social connections contribute to our ability to navigate the challenges of life, protect against loneliness, and improve our overall wellbeing. In the words of Robert Waldinger, head of the Harvard Study,

> *The trick is that those relationships must be nurtured.*

Even though many of us spend nearly a third of our waking hours at work, it is often easy to forget that the relationships we have at work need to be nurtured to thrive. Good quality relationships with colleagues and managers help employees do their jobs, through practical things such as job-related knowledge, but also emotional support.[48,49]

These connections enhance teamwork, communication and cooperation. Friendships in the workplace are linked with increased job satisfaction, job performance, team cohesion, retention rates, and organisational commitment.[50,51] Organisational commitment is in turn associated with increased motivation, job satisfaction and reduced staff turnover. The quality of our relationships at work can even reduce the risk of making errors and provide a sense of psychological safety that allows us to speak up.[52]

Relational leaders have a profound impact on workplace culture, supporting the development and nurturing of good quality relationships in the workforce. Managers can create an environment through their actions that has direct and indirect effects on workplace relationships. Leader inclusiveness – when leaders invite and appreciate the contributions of others – improves collaboration across teams.[53]

Compassionate leaders who listen to, understand, and empathise with employees create an environment where people feel valued and respected, resulting in a more engaged and motivated workforce.[54] When leaders are empathic there is greater empathy amongst colleagues. When they are effective communicators, it increases job satisfaction and efficacy. When staff feel truly valued and respected by their managers, they are happier, and have higher job satisfaction, with better outcomes for them and for their workplace.

The quality of our relationships at work also has a direct impact on the quality of our relationships at home. Studies have demonstrated the connection between our experiences at work and our relationship wellbeing. When we have positive experiences at work, this can have a positive impact on our home relationships.

However, negative workplace experiences such as role ambiguity, role overload, and lack of support, can spill over into our relationships at home, and have a detrimental impact on relationship wellbeing. This is a bidirectional process, meaning the negative impact on our home relationships bounces straight back into our work life in the form of lower job satisfaction, higher risk of burnout, increased sickness absence, and greater likelihood of wanting to find new employment.[55]

The association between home and work stress is even more profound for high earners, with one study reporting that 69% of high earners experience difficulty in their romantic relationship, and 38% say that work pressures were the reason for their relationship difficulties.[56] The message is clear – when we are happier and less stressed at home, we are happier and less stressed at work. Happy homes lead to productive workplaces, and productive workplaces lead to happy homes. It's a cycle, and it doesn't end.

When thinking about your relationships at work, remember that you have the power to contribute to a positive environment, with fewer mistakes, more productivity, and a loyal and committed workforce. In doing so, you are also contributing to happy homes, and a happier and healthier society.

So, as you approach your next interaction with a colleague or group of colleagues, make the effort to focus, tune in, and really listen. When you can show another person that they have your full attention, you're opening the door to a world of positive changes.

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Creating Energetic Connections Through In-Person Events
Sponsor Spotlight: OnSiteHub

Milana Martinovic is a remote work expert with 15 years of experience managing and optimizing distributed teams. She is the founder of OnsiteHub.

Nobody can really dispute the impact that workplace happiness has on the success of an organization. The logic is simple: when people feel valued, supported, and happy at work, they contribute more to the organization's success. This report is full of the evidence. Engagement rises, collaboration improves, and teams move faster because people actually want to show up and do great work together.

For a long time, keeping employees happy felt relatively straightforward. Most of us worked in offices. A well-designed workspace, friendly colleagues, and a few perks went a long way. There were spontaneous conversations over coffee, weekly happy hours, and the small moments that made work feel human. Your manager sat nearby, your team was within reach, and decisions happened quickly. Laughter flowed easily and work just . . . worked.

Then the pandemic hit, and everything changed. Almost overnight, organizations had to rethink how and where work happens. Hybrid and remote models became the norm, and the old playbook for building strong workplace culture suddenly didn't translate so easily.

The physical office had quietly been doing more work than we realized – creating connection, alignment, and shared energy in ways that are harder to replicate through screens. Remote and hybrid work didn't kill culture. They just made it harder to fake.

You can still have smart people, good intentions, and decent morale. But the cracks rarely show up in the atmosphere – they show up in execution. Decisions take longer. Priorities drift. Feedback loops stretch. Everyone is busy, yet the machine feels slower than it should. That's why in-person events matter more than ever today. Not as a reward, but as a way to recalibrate the operating system.

What the data shows before people meet

At OnsiteHub, we ran a baseline measurement ahead of a global retreat: 180 employees from 27 countries coming together for three days in Turkey.

At first glance, the results looked strong. The eNPS score was 57. Safety scored 8.5, and work environment 8.9. The fundamentals were clearly in place – people felt respected and generally positive about their experience. But the insight wasn't in the headline numbers. It was in the gaps.

Clarity scored 8.1 – solid in isolation, but noticeably lower than the rest. That's how remote friction often appears: not as a crisis, but as drag. Personal Growth was the weakest theme at 7.5, suggesting that while people were able to deliver, they were less confident they were improving. Overall sentiment was mildly positive at 0.3, yet more than a quarter of comments skewed negative.

In other words, this wasn't an unhappy team. It was a team that was emotionally aligned but operationally misaligned.

Ctrl + Alt + Retreat

In-person events work because they address the conversations that async communication struggles to hold. You cannot Slack your way into clarity around priorities, trade-offs, or ownership. Those decisions require shared context, visible tension, and real-time discussion.

When teams are in the same room, they can finally tackle the questions that tend to slow organizations down: What actually matters this quarter? What gets cut? What does "done" look like? Who owns what – and what happens when we disagree? Enablement improves because blockers surface faster and can be resolved with the right people present. Recognition improves because work becomes visible again, not as status updates but as outcomes people can acknowledge and celebrate. Juniors gain mentorship, managers gain alignment, and executives reconnect with operational reality.

Closing the growth gap

Trust accelerates in person. Once that trust exists, disagreements become more productive because context and rapport are already there. Teams can challenge each other without defaulting to defensiveness. We saw that shift clearly in the data.

Impact of the retreat (pre vs. post event)

How much do you feel you belong at this organisation?

- Before retreat: **8.3**
- After retreat: **8.7**
- ⬆ Change: **+0.4**

How much do you enjoy working with your team?

- Before retreat: **8.6**
- After retreat: **9.0**
- ⬆ Change: **+0.4**

To what extent do your interactions with colleagues boost your energy and motivation at work?

- Before retreat: **8.1**
- After retreat: **9.0**
- ⬆ Change: **+0.9**

How clear is the link between your role and the success of the organisation?

- Before retreat: **8.3**
- After retreat: **8.7**
- Change: **+0.4**

How committed are you to helping the organisation succeed?

- Before retreat: **8.3**
- After retreat: **8.7**
- Change: **+0.4**

> Average score increase across measured areas: **+0.56**

The most notable shift was in the energy people get from interacting with colleagues. That suggests something important: in-person time doesn't just improve alignment – it restores momentum.

The impact after everyone goes home

Retreats don't replace strong management or good operating systems. They amplify them. The real impact shows up once everyone returns to their laptops. Teams hold fewer meetings because decisions already exist. Approvals move faster because decision rights are clear. Handoffs improve because "done" has been defined together. Stress decreases because workload trade-offs were discussed openly rather than absorbed silently.

On a human level, something shifts as well. Colleagues stop being names in a channel and become people you can rely on, challenge, and move quickly with. That difference is most visible when pressure rises or priorities change. Trust speeds execution.

When done well, a retreat leaves tangible assets behind: a one-page plan teams actually use, a short list of decisions that won't be reopened next week, named blockers with owners and dates, and a simple cadence for updates and recognition that survives the return to remote work. **That's Ctrl + Alt + Retreat.**

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Freedom

When we think about work, freedom isn't necessarily the first thing that comes to mind. But underneath the innately transactional relationship between employer and employee, work can be where we get to be creative thinkers, problem solvers, mentors, and innovators, if organizational culture allows it.

Freedom sits within the Happiness area of the model. It stems from the Instinctive area of the brain, the oldest and most fundamental system we carry. Once our basic safety needs are met, the instinct to thrive takes over – to explore, to extend our influence, to be ourselves. In organizational terms, it's about whether the workplace allows people to show up as who they are, whether they feel they belong there, and whether they have the latitude to do their work as they see fit.

The Global Workplace Happiness Survey explores safety with three questions:

1. How free do you feel to be your true self at work?
2. How much do you feel you belong at this organisation?
3. How satisfied are you with the level of freedom you have in your role?

Based on over 190,000 data points, Freedom scores unevenly and perhaps unfairly.

	How free do you feel to be your true self at work?	How much do you feel you belong at this organisation?	How satisfied are you with the level of freedom you have in your role?
Seniority			
Executive leadership	7.3	7.2	7.4
Strategic management	7.7	7.5	7.7
Operational management	7.7	7.5	7.6
Professional/Specialised contributors	7.4	7.2	7.5
Entry level	7.3	7.1	7.5
Tenure			
0-2 years	7.6	7.2	7.6
2-5 years	7.5	7.0	7.5
5-10 years	7.4	7.1	7.5
10+ years	7.5	7.2	7.5
Work style			
Field-based	7.1	6.9	7.2
Office	7.2	7.1	7.3
Hybrid	7.5	7.3	7.7
Remote	7.8	7.4	7.9
Gender			
Female	7.2	7.0	7.2
Male	7.4	7.3	7.4
Age			
19 - 29	7.0	7.1	6.9
30 - 39	7.2	7.1	7.2
40 - 49	7.3	7.2	7.4
50 - 59	7.3	7.1	7.4
60+	7.6	7.5	7.6
Company size			
10 and under	7.2	7.3	7.2
11-50	7.1	7.2	7.1
51-250	7.1	7.0	7.1
251-1000	7.4	7.0	7.4
1000 +	7.7	7.2	7.6

- **Authenticity** is among the stronger scoring questions in the survey. Many people feel they can be themselves at work, but authenticity is not equally distributed. It is most available to those whose identity already fits the dominant culture and least available to those for whom showing up as themselves carries social or professional risk.
- **Belonging** is the lowest-scoring question in the set and one of the most important variables in the entire survey. It ranks as one of the top two predictors of overall happiness and sits in the top three for retention and eNPS. Belonging is a dimension that cannot be self-generated: you can independently manage your workload, build a relationship with your manager, or develop a skill, but you cannot make yourself belong. Belonging is conferred by the environment, and operational competence can't compensate when it is absent.
- **Role freedom** scores identically to authenticity, rounding out a picture of a global employee population that feels it has reasonable latitude in how it approaches its work. In the key driver analysis, role freedom sits in the middle of the pack for most outputs – meaningful but not one the most powerful predictors. It supports the broader experience of work without being the dimension that tips someone from content to committed.

Themes from comment analysis

The concept of Freedom in the workplace is a critical driver of employee happiness and engagement. An analysis of global employee comments reveals a dichotomy in how freedom is experienced across different roles, industries, and organizational sizes.

When employees feel free, they describe environments characterized by high trust, empowering leadership, and the flexibility to execute their roles without heavy-handed oversight. This positive experience is frequently reported by individuals in hybrid work settings, senior management roles, and those in smaller to mid-sized organizations. These employees feel their unique perspectives are valued, which naturally fosters a deeper sense of belonging, engagement, and innovation.

I am given [a] free hand to work on my work. There is no close monitoring. My views and decisions are heard and valued.

(Male, 50–59, Senior Manager, India)

Conversely, a significant portion of the workforce feels highly restricted. In large enterprises (1,000+ employees), particularly within frontline industries like Manufacturing, Retail, and Food & Beverage, freedom is often stifled by intense micromanagement, rigid procedures, and even physical surveillance. Furthermore, across various sectors, middle managers and operational staff report a burden of bureaucracy and red tape, stripping them of their decision-making power.

I feel micromanaged, and I do feel that it is difficult to express myself. When sharing facts or thoughts on situations, even in a constructive way, it is viewed as complaining.

(Food & Beverage, 1,000+, Unknown)

Psychological safety also remains a pressing concern. Many employees report the exhausting need to "mask" their true personalities to fit corporate expectations or avoid office politics. Ultimately, the data indicates that while companies espouse the values of autonomy and inclusivity, the day-to-day reality for many is still constrained by hierarchical control. Bridging this gap by building genuine trust is essential for cultivating a happy, high-performing workforce.

There is very little freedom within [company name]. In general, everything is micromanaged at the AD level, and there is no possibility to innovate, create, and do great things. None of these people have budgets, so everything anybody wants to do needs raising.

(Male, 10+ years, Defense and Space, UK)

Demographic splits

- **Age.** Freedom and authenticity increase steadily with age, making this one of the clearest linear progressions in the dataset. Younger workers predictably report the lowest autonomy, particularly in how much latitude they feel they have within their roles. By the time employees reach their 60s, they report the highest freedom scores across every dimension. The trajectory suggests that authenticity at work is partly an earned asset and a function of accumulated credibility, seniority, and the confidence to set boundaries. An interesting question is whether this should be the case. In highly changeable fields, such as high tech, freedom for younger workers to suggest new ways of doing things and challenge accepted wisdom could be the difference between stagnation and growth.

- **Company size.** The familiar U-shape reappears, with the largest firms leading on individual autonomy and micro-businesses leading on belonging, while mid-sized organizations deliver the weakest scores on both. The trough is sharpest for firms in the 51–250 range, where employees report the lowest sense of belonging in the study. These firms have grown past the intimacy of a small team but haven't yet built the formal infrastructure that supports empowerment at scale, leaving them in a structural no-man's land where neither proximity nor policy is doing the work.

- **Gender.** Men report the highest freedom scores across every dimension, with women trailing consistently, particularly on belonging. Among other reasons, this matters because freedom is a prerequisite for risk. We can be committed and diligent without it, and women's commitment scores bear that out, where they are nearly as high as men's. But innovation, advocacy, and the kind of discretionary effort that distinguishes a good employee from a great one require the confidence that comes from feeling free to act, speak, and take a position without penalty.

- **Seniority.** Freedom peaks at the management tiers and drops at both extremes of the hierarchy, mirroring the bell curve seen in Relationships. Strategic and operational managers report the highest autonomy and the strongest belonging. Executive leaders, despite their positional authority, score no higher than entry-level staff, challenging the assumption that seniority and freedom move in lockstep. The constraint at the top appears to be one of isolation rather than restriction, while at the bottom it is more conventionally about limited latitude within the role.

- **Tenure.** Belonging is the weakest dimension throughout our working years, dipping earliest and recovering least. The implication is that organizations struggle to sustain the sense of connection and agency that made the early experience feel expansive.

- **Work style.** As you would expect, remote workers report the highest freedom scores in the study. Field-based employees sit at the bottom, with the widest gap appearing on belonging, suggesting that mobility without connection produces isolation rather than independence. The pattern reinforces a finding that runs across multiple themes: physical distance from a traditional office, when paired with deliberate communication, produces better perceived outcomes than proximity without intentional design.

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Global Workplace Happiness Report

The Freedom to Be Yourself
Spotlight: Fiona McDonnell

Fiona McDonnel is an executive leader with three decades of experience at global enterprises such as Amazon and Booking.com. She is the author of Two Mirrors and a Cheetah, a guide to career ownership and authenticity.[58]

> *I have been surrounded by preventative maintenance for the last three decades. When a production line stops or a system fails, a team are deployed to fix, along with a deep dive to understand, learn and avoid a repeat.*

We finesse our understanding of failure modes to predict and prevent events that stop systems operating optimally. The cost of not doing so is too high.

Dashboards highlight issues before they become critical, metrics help find pressure as it builds, and downtime gets scheduled in to avoid pushing systems to their breaking point. Great use of data has driven understanding, increased reliability and performance of our systems.

During the same time, I have seen companies fail to identify and prevent the build-up of pressure in people, all the while identifying employees as their greatest asset. Instead of learning about the signals that precede human breakdown, we celebrate stoic resilience, reward workaholism and seldom schedule in regular downtime.

Stress, burnout, anxiety are all on the rise, and these are indicators that our human systems are not set up for reliability and performance. Incentives can be deployed to boost short term performance, but they are insufficient to sustain it. It is time for preventative maintenance of our people.

There's nothing quite like the feeling and the energy of being amongst people doing their best work, understanding what they do and why it matters, and all collaborating in a way that fits everyone. Over the years I have led various diverse teams and organisations and that feeling is rare. It is seldom something that happens by accident, but we can achieve it more often by design. Setting people up for success, and removing the hurdles that stop them from succeeding as they are, can work wonders. When we give people the freedom to simply be themselves, without fear of consequences, we unleash a pure source of energy and intrinsic motivation.

The energy people bring to their work is shaped by many things, including their past experiences, but the team, the culture, and the manager relationship go a long way in helping, or hindering someone being themselves. Feeling like we can be ourselves should be the path of least resistance, but it needs the right environment. When people put effort into non-productive things like keeping up appearances, trying to be something or someone they are not, worrying about being accepted, holding back contributions for lack of confidence, or fear of being judged, then the whole team suffers.

Not only does the business miss out on the diverse perspectives but the individual suffers, not just from the stress of keeping up the pretence, but with the slow erosion of their self-esteem, self-belief and sense of value. When people lack the conditions they need for success, they hide who they are as a mode of self-protection.

It takes more than a corporate slogan that shouts "come as you are" to change this. To truly embed this freedom, managers, not just companies, need to be knowledgeable and equipped to create the environments that nurture uniqueness and give people what they need, rather than penalise those brave enough to come as themselves.

Some of the worst burn out rates and engagement scores I have seen come from managers who fail to connect on a human level. Managers who can't listen to or trust their teams, who have rewarded silence over freedom of expression and taught people to hide what they have to say and who they are. To them a KPI to hit and the promise of large bonuses is a sufficient carrot, and when it fails they reach for the stick.

Ironically, this is where I have seen engagement data help out the most.

Giving managers a sense of where something is wrong, and when to have a conversation, is game changing. If managers connect with people as individuals and leverage data to guide them in choosing where to probe, to understand, then progress is possible. The majority of hurdles I have seen in business come from misunderstandings, and dialogue is frequently a positive step forward.

Data gives us a way to see if our visions and intentions translate not only into actions, but how those actions are interpreted by people. Wellness data and engagement data literally holds up the mirror to leadership. Data keeps leaders accountable for how their team feels, not just how they perform. The what in tandem with the how makes it teachable too.

When people are engaged in activities they enjoy, with people they enjoy spending time with, barriers are dropped and breakthrough rather than breakdown performance can happen. Healthy employees tend to work better and more productively, and as well as having lower burnout, anxiety, and absenteeism. Wellness driven by people being themselves and setting environments where others can be too, becomes the company's capacity to drive performance sustainably over time.

As a leader at your organisation, ask yourself which conversations are not happening and what signal would you need to see before you take action to improve?

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References

[58] McDonnel, Two Mirrors and a Cheetah, Double Magpie, 2021

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Acknowledgement

When was the last time you received meaningful feedback, the kind that made you feel seen for your efforts, or taught you something about yourself, or your work? In many workplaces, feedback is either too infrequent or too unconsidered to reach this level, often a simple check-in on the task list instead of the people involved.

Acknowledgement sits within the Happiness area of our model. It is part of the Emotional area of the brain. Acknowledgment plays a vital part in connecting us to other people and our environment.

The Global Workplace Happiness Survey explores safety with three questions:

1. How much do you feel valued as an individual?
2. How much do you feel your opinions are listened to?
3. How often do you receive feedback on your work?

Based on over 180,000 data points, acknowledgment represents one of the clearest opportunities for organizations and leaders.

	How much do you feel valued as an individual?	How much do you feel your opinions are listened to?	How often do you receive feedback on your work?
Seniority			
Executive leadership	6.9	6.9	6.3
Strategic management	7.4	7.3	6.7
Operational management	7.2	7.1	6.8
Professional/Specialised contributors	6.9	6.9	6.5
Entry level	6.9	6.8	6.6
Tenure			
0-2 years	7.3	7.1	6.8
2-5 years	7.0	6.8	6.4
5-10 years	6.8	6.7	6.3
10+ years	6.9	6.8	6.2
Work style			
Field-based	6.6	6.3	6.1
Office	6.8	6.7	6.3
Hybrid	7.1	7.1	6.8
Remote	7.4	7.3	7.0
Gender			
Female	6.8	6.7	6.3
Male	7.1	6.8	6.6
Age			
19 - 29	6.8	6.5	6.7
30 - 39	6.9	6.7	6.5
40 - 49	6.9	6.7	6.4
50 - 59	6.8	6.7	6.2
60+	7.1	7.0	6.5
Company size			
10 and under	7.1	6.9	6.4
11-50	6.8	6.6	6.2
51-250	6.7	6.5	6.2
251-1000	6.9	6.7	6.4
1000 +	7.2	7.0	6.6

- **Feeling valued** ranks third in the key driver analysis for overall happiness, behind only inspiration and belonging, and sits in the upper tier for eNPS and perceived pay fairness as well. It is a bridge between the emotional and the organizational: unlike belonging, which describes a person's relationship with a collective, or inspiration, which describes their relationship with a mission, feeling valued describes whether the organization notices and knows them. The gap between its importance and its delivery is one of the most actionable findings in the study. It is a specific, measurable deficit in recognition that correlates strongly with the outcomes organizations care most about.

- **Opinions listened to** measures something subtly different from feeling valued: not whether your contribution is recognized, but whether your voice shapes decisions. It tracks closely with feeling valued across every demographic and firmographic lens, but sits consistently below it, suggesting that organizations are marginally better at making people feel appreciated than at making them feel heard. In the key driver analysis, being listened to clusters in the upper-middle range for happiness and eNPS. It is not as powerful as belonging or inspiration, but meaningfully stronger than operational dimensions like workload or clarity. The practical implication is that listening is a cultural signal that tells employees whether they are participants.

- **Feedback frequency** is a concrete and operationally addressable dimension in the Acknowledgement theme: feedback can be systematized, scheduled, and measured. That it scores so poorly despite being the easiest to formalize suggests that many organizations haven't treated it as a priority. The finding pairs with the key driver analysis, where Acknowledgement and Personal Growth, the two dimensions most dependent on regular, individualized communication, are among the strongest correlates of eNPS. Organizations are underdelivering most where the return on investment would be highest.

Themes from comment analysis

The comments surrounding the theme of Acknowledgement reveal a polarized global workforce experience.

At the micro-level, a significant portion of the dataset reflects high levels of happiness and psychological safety, driven by supportive direct line managers and cohesive immediate teams. In these localized bubbles, employees feel their opinions matter, their hard work is recognized, and peer-to-peer acknowledgment serves as a strong emotional anchor.

> *Our opinions are heard and there's no wrong answer or question we ask.*
>
> *(US, Transportation, 51–250, Male, 30–39)*

However, as the lens widens to the macro-organizational level, a disconnect emerges. A pervasive trend across multiple industries is the frustration directed at senior leadership. Employees frequently describe feeling like "just a number," a "statistic," or a "cog in a machine," expressing resentment that upper management is detached from the day-to-day realities of their roles. This sentiment isn't so common nor so powerful that it counteracts the strength of large organizations' scores across the dataset, but it's likely to be a strong variable at the level of individual companies.

> *We are just a number. It doesn't feel like a family and when we have our say it just goes out the window.*
>
> *(UK, Food & Beverage, 251–1,000)*

There is also a systemic issue with how feedback is delivered and received. While organizations might boast about soliciting opinions, employees feel this is often performative. Many view these efforts as "fake listening," where ideas are gathered but decisions are ultimately forced top-down without operational context. Additionally, recognition remains heavily skewed toward the punitive; respondents globally note that silence is the default for good work, while mistakes are met with immediate reprimand.

> *Opinions may be listened to, but they aren't heard. No one cares what the 'little people' think because a decision has already been made by higher management on what will happen in any given situation.*
>
> *(US, Other, 251–1,000, Female, 30–39)*

Demographic splits

- **Age.** Acknowledgement scores are remarkably flat across the working life, with no age group pulling significantly ahead of any other on feeling valued or being listened to. The one exception is feedback frequency, where the youngest workers report the lowest scores in the study, a finding that cuts against the intuition that early-career employees would presumably need and receive the most guidance. The issue may well be quality rather than the strict frequency of feedback. The 60+ cohort edges ahead on all three questions, consistent with the broader pattern of older workers reporting higher satisfaction, but the differences are small.

- **Company size.** The largest firms lead on all three Acknowledgement questions, while the mid-sized trough that appears across other themes is visible here too, particularly on feeling valued and being listened to, where firms in the 51–250 range sit at the bottom. Micro-businesses hold up better than their slightly larger counterparts, likely because proximity makes recognition more automatic. The gap between the smallest and largest firms is widest on feedback frequency, suggesting that enterprise-level organizations are more likely to have formalized the mechanics of feedback even if the broader culture of acknowledgment remains a work in progress.

- **Gender.** Men outscore women on all three Acknowledgement questions, with the gap widest on feeling valued. For acknowledgment specifically, this suggests that the mechanisms through which organizations recognize contribution are not gender-neutral. Research has long documented that women disproportionately carry the informal, relational, and coordinating work of teams, work that rarely enters the performance conversation. When recognition systems default to rewarding output that is visible, measurable, and individually attributed, these essential contributions that hold teams together go unacknowledged.

- **Seniority.** The management tiers report the highest scores on all three questions by a clear margin. Executives score notably low on feedback frequency, which aligns with the broader isolation pattern at the top of the hierarchy. Entry-level employees and professional contributors share similarly modest scores, suggesting that recognition flows most naturally to those in the visible middle of the organization rather than to those at its edges.

- **Tenure.** Acknowledgment erodes steadily with time in the organization, following a steeper version of the honeymoon-to-plateau pattern. New hires report the highest scores across all three questions, with the sharpest decline appearing in feedback frequency, which drops significantly within the first few years and never fully recovers. The implication is that organizations front-load recognition during onboarding and the early employment period but fail to sustain it, part of the dynamic that feeds the mid-tenure disengagement visible elsewhere in the data.

- **Work style.** Remote workers report the highest acknowledgment scores in the study, leading on all three questions and widening the gap most dramatically on feedback frequency. The pattern inverts the assumption that physical presence would make recognition easier: in practice, remote workers may operate within more deliberately structured communication rhythms that include more frequent and intentional feedback.

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Engagement is a Two-Way Street
Sponsor Spotlight: Pluxee

pluxee

GWHR

Viktoria Otero Del Val is the Group Chief Strategy Officer for Pluxee.

Over the course of our lives, most of us will spend hundreds of thousands of hours at work. Yet many of us don't feel truly seen in this place where we invest so much time. Acknowledgement, which is defined as feeling recognised, receiving feedback, and being listened to, scores among the lowest dimensions in employee happiness research. Understanding why, and what to do about it, requires looking at employees differently.

The data from The Global Workplace Happiness Survey confirms that acknowledgement is one of the lowest-scoring dimensions, particularly among employees later in their careers and those who have been in the same role for several years. This presents both a challenge and an opportunity for organisations willing to look more closely at how their people experience work. Pluxee's New Rules of Engagement research offers exactly that perspective. Its findings point to two ideas that are central to understanding acknowledgement: employees feel more acknowledged when they are seen as multidimensional people and not just workers, and when their relationship with their employer feels genuinely reciprocal.

The New Rules of Engagement is one of the first studies of this scale on employee engagement, drawing on responses from 8,700 employees across 10 countries and 80 in-depth video interviews. And the findings are more optimistic than many might expect: 83% of employees say they like or love their organisation; 71% describe work as essential to their lives. Yet the same research makes clear that work sits within a much larger equation.

Today's employees want work and life to flow. They are not looking to keep the two worlds separate, but to blend them more seamlessly. People do not want to feel pressured to choose between their job and their personal life.

Our research is among the first to highlight Measured Engagement which means committing to work while protecting boundaries. It taps into that sweet spot where employees can balance their involvements without feeling overextended. It also serves as a middle ground where people can enjoy their jobs without sacrificing their personal lives.

In this context, acknowledgement is important. When people feel recognized and valued as individuals, they can find the right balance.

But engagement isn't all in or all out. It is as individual as we are. The New Rules of Engagement identifies eight distinct engagement profiles, shaped by two key factors: how much importance an individual places on work relative to the rest of their life, and whether their focus tends to be more personal or collective. Each reflects a different shade of engagement we might experience throughout our careers.

The profiles range from the All Parts Engaged, the engagement superstars who are actively involved at work and in the community, to the Outsiders at the other end, who are entirely centered on their personal life and withdrawn from the community.

Life stages and priorities determine where we fall on this spectrum. For example, we might become more focused on personal life as we age, when family and caregiving move to the top of the list. At other moments, such as right after finishing school or when a promotion is within reach, we may feel more driven toward our careers.

Employees expect their companies to recognise that they are not only workers, but individuals and citizens with lives that extend well beyond their job. What they want, in return, is the freedom to shape their own engagement at work, and a personalised experience that reflects this multidimensionality.

This has direct implications for acknowledgement. When organisations apply a uniform approach to recognition, they risk missing the people who need it most. Employees feel genuinely seen when their employer recognises the full context of their lives, not only their professional contribution.

Recognition and acknowledgement are also relevant to the broader dynamic of reciprocity. Employees are willing to invest their time and energy in their work, but they expect that commitment to be matched. They are clear about what they want in return for their hard work: opportunities for growth and autonomy, authentic human connections at work, and benefits that genuinely fit their needs.

More than one-third of employees in our study cited relevant, personalised benefits as a key factor in what makes an employer attractive. When people can choose how they are supported, in ways that reflect their actual lives, they feel acknowledged in ways that are meaningful to them.

What does this all look like in practice?

Understanding your workforce means creating conditions in which people consistently feel acknowledged. This can be done through open and honest dialogue between leadership and employees, surveying employees and responding to their feedback, recognition embedded in everyday culture rather than reserved for formal moments, and benefits that adapt to the real and changing needs of a diverse workforce.

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Meaning and Purpose

There's nothing more powerful than purpose, in our lives and in our work. The distance between what people are willing to give and how their work makes them feel is the defining tension of this theme and, arguably, of this report as a whole.

Meaning and Purpose sits within the Engagement area of our model. It looks at the Reflective functions of the brain, where we focus on ensuring what we are doing connects to a cause, and it's why we attach ourselves to something beyond simple necessity.

The Global Workplace Happiness Survey explores safety with three questions:

1. How aligned are the values of the organisation with your own personal values?
2. How committed are you to helping the organisation succeed?
3. How inspired are you by your organisation?

Based on over 173,000 data points, Meaning and Purpose is the theme that most starkly exposes the gap between what matters and what organizations deliver.

	How aligned are the values of the organisation with your own personal values?	How committed are you to helping the organisation succeed?	How inspired are you by your organisation?
Seniority			
Executive leadership	6.9	7.8	6.5
Strategic management	7.4	8.4	7
Operational management	7.4	8.3	6.8
Professional/Specialised contributors	7	7.7	6.4
Entry level	7.1	7.5	6.5
Tenure			
0-2 years	7.3	8.1	6.9
2-5 years	6.9	7.9	6.7
5-10 years	6.9	7.7	6.4
10+ years	6.8	7.9	6.5
Work style			
Field-based	6.6	7.4	6.1
Office	6.9	7.6	6.4
Hybrid	7.3	7.8	6.7
Remote	7.4	7.8	6.9
Gender			
Female	6.8	7.7	6.4
Male	7.1	7.9	6.6
Age			
19 - 29	7.0	7.3	6.1
30 - 39	7.0	7.6	6.3
40 - 49	7.0	7.9	6.5
50 - 59	6.8	7.8	6.4
60+	7.1	8.1	6.8
Company size			
10 and under	7.0	7.7	6.4
11-50	6.8	7.5	6.1
51-250	6.8	7.5	6.2
251-1000	6.9	8.0	6.5
1000 +	7.2	8.3	7.0

- **Values alignment** scores in the middle of the survey, but its influence is disproportionate to its score. Values alignment is the strongest predictor of eNPS in the key driver analysis. Recommending your employer is an act of personal endorsement, and people will not stake their reputation on an organization whose values they don't share. Where alignment is weak, no amount of operational competence will convert a satisfied employee into an advocate.
- **Commitment** is the highest-scoring question in the survey by a clear margin. People overwhelmingly say they want to help their organization succeed. But it coexists with some of the lowest scores on the dimensions that would sustain it: inspiration, feedback, and career progression. The risk is that organizations might read high commitment as proof that the emotional contract is healthy, when it may reflect habit, obligation, or a lack of alternatives rather than genuine engagement.
- **Inspiration** is among the lowest-scoring questions in the survey, and the single most important one in it. It ranks first in the key driver analysis for overall happiness, second for eNPS, and sits in the top tier for every other output measured. No other variable combines this degree of statistical influence with this degree of underperformance. People know their roles, have the tools they need, and get along with their colleagues, so organizations know how to build a solid foundation, but they have not given people a reason to care beyond the transactional.

Themes from comment analysis

The analysis of the Meaning and Purpose comments reveals a workforce deeply driven by intrinsic motivation and a desire to make a positive impact.

Across the globe, employees find profound meaning in their day-to-day responsibilities, particularly when their work directly benefits clients, patients, or communities. Many express a strong personal work ethic, indicating that their commitment to success stems from their own professional standards and loyalty to their immediate teams, rather than overarching corporate mandates.

I like the service my company provides to the market and the world, by financing, supporting and collaborating with projects that...are born with the purpose of generating a positive impact on society...
(Chile, Male, 30–39, Insurance)

However, how employees view their personal purpose and how they perceive their organizations can be starkly different. While the theoretical missions of their companies are often praised, employees frequently report a disconnect between stated values and the actual behaviors of senior leadership. A prevailing sentiment is that organizations are increasingly prioritizing profits, cost-cutting, and shareholder returns over employee well-being and service quality. This "profit-over-people" perception breeds cynicism and actively diminishes inspiration.

I fully share the values that are pasted on the walls, but I absolutely do not share the behavior of the leaders who ultimately define the company culture.
(Argentina, Male, 50–59, Retail)

Many employees also feel their dedication is treated as a one-way street. They consistently go above and beyond, such as managing heavy workloads due to understaffing, yet report a lack of recognition, inadequate compensation, and poor communication from the top down. Consequently, while employees remain highly committed to their personal roles and immediate colleagues, their inspiration derived from the wider organization is jeopardized. To restore a shared sense of meaning and purpose, organizations must ensure that their operational decisions authentically reflect their stated core values and that employee contributions are genuinely recognized and reciprocated.

I've always been deeply committed to doing my job well and supporting the organisation's success...however, that same level of commitment has not always felt reciprocated. The lack of visible investment in my growth, recognition, or wellbeing has left me feeling uninspired.

(UK, Director, Retail)

Demographic splits

- **Age.** Commitment rises steadily with age, making it one of the cleanest upward progressions in the survey. Older workers are significantly more invested in organizational success than younger ones. Values alignment and inspiration, however, are essentially flat across the working life, with no cohort pulling meaningfully ahead. The youngest workers report the lowest commitment and among the lowest inspiration levels, but this likely reflects the early stage of the employment relationship rather than disengagement. The 60+ cohort leads on all three questions, consistent with the broader pattern. The takeaway is that purpose deepens with tenure and experience, but inspiration does not.

- **Company size.** The largest firms lead on all three Meaning and Purpose questions, with the widest advantage appearing on inspiration and commitment, both of which rise sharply at enterprise scale. Mid-sized firms sit at the bottom on inspiration and values alignment, extending the structural trough visible across other themes. Micro-businesses, despite their intimacy, do not outperform on purpose the way they do on belonging or relationships. The implication is that mission and vision require deliberate organizational investment in narrative, communication, and visible leadership.

- **Gender.** Men outscore women on all three questions, with the gap narrowest on commitment and widest on values alignment. Both studied genders report high willingness to contribute to organizational success, but women may feel slightly less connected to the organization's identity and less inspired by it.

- **Seniority.** Meaning and Purpose follows the familiar bell curve, peaking sharply at strategic and operational management. These tiers report the highest commitment, the strongest values alignment, and the most inspiration, by a considerable margin over every other level. Executives score well below the management layers immediately beneath them, particularly on inspiration, reinforcing the pattern of isolation at the top. Entry-level employees and professional contributors share similarly modest scores. The people closest to both the mission and the teams that execute it feel the most purpose; those at the extremes of the hierarchy feel the least.

- **Tenure.** All three questions decline from the point of hire, but they decline at different rates. Inspiration drops the fastest, falling significantly within the first few years before partially stabilizing. Values alignment erodes more gradually. Commitment, while still highest among new hires, holds up better than either; people continue wanting the organization to succeed even as their belief in it fades. The divergence is the signature of the mid-tenure plateau: employees who once felt inspired settle into a posture of dutiful contribution without the emotional fuel that drove it initially.

- **Work style.** Remote workers report the highest scores on all three questions, with the gap largest on inspiration and values alignment. Field-based employees sit at the bottom across the board. The spread between remote and field-based workers is among the widest for any question across any demographic lens, suggesting that how and where people work has a pronounced effect on whether they feel connected to organizational purpose.

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The Importance of Meaning and Purpose at Work
Spotlight: Dr. Sarah Pass

GWHR

Dr. Sarah Pass is a Senior Lecturer at Nottingham Business School and an Advisory Board member of Engage for Success.

From a young age, we are often asked, "What do you want to be when you grow up?" Our answers often focus on a role that has meaning: a teacher, a doctor, a firefighter. As adults, social introductions continue this pattern. "What do you do?" is one of the first questions we ask, and our answer is often met with admiration, curiosity, or sympathy. What we do at work, and where we do it, defines us. It gives us meaning, a sense of purpose to our lives. From childhood to adulthood, it gives us a direction of travel. A destination.

While academics have studied meaning and purpose at work for decades, its presence in boardrooms and executive conversations is more recent. What was once considered a personal or philosophical issue has become essential to attracting, retaining, and inspiring employees. A range of social and economic factors have amplified its importance.

Fewer of us are constrained by socioeconomic background or family expectations. People have more mobility, more career choices, and greater access to education. With options comes an opportunity for reflection and the question, "What do I want to do?"

The global financial crisis exposed the fragility of the promise that relentless work guarantees stability. The Covid-19 pandemic reshaped priorities, prompting people to reconsider where they want to focus their time and energy. Increasing burnout and anxiety have pushed workers to reassess what feels worthwhile and what does not.

Research has also accelerated this shift. Studies increasingly show that purpose and meaningful work are powerful drivers of engagement, commitment, innovation, and performance. When people feel their work matters, they are more resilient in the face of deadlines, restructures, and day-to-day pressures. Teams with a clear sense of shared purpose pull together more effectively, navigate uncertainty more calmly, and apply more discretionary effort to collective challenges.

Although often used interchangeably, it is important to note the difference between meaning and meaningful work. Meaning is personal and interpretive. It reflects how individuals understand the significance of their work within the bigger picture. Meaningful work, on the other hand, is the lived momentary sense that what we are doing is significant, worthwhile, and aligned with our personal values.

Meaningfulness is not constant; ironically, if it were, it would lose its meaning. It is found in moments when impact becomes visible or when values are enacted. These moments often appear small, but they have an outsized impact. Simple things like a customer thanking you for helping them solve their problem, a colleague appreciating your support, or a note of thanks from senior leaders for something specific you have done. These experiences provide a sense of connection, contribution, and visibility of the impact of our efforts.

While meaning is personal, organisations play a decisive role in creating, or constraining, the conditions that give work purpose. Organisations can strengthen meaning by helping employees see the value and impact of their contributions. A culture that consistently reinforces shared values amplifies these moments, turning individual effort into collective purpose.

Work has more meaning and purpose when employees have autonomy and voice. Autonomy transforms work from something we have to do into something we choose to do. It increases ownership, strengthens intrinsic motivation, and allows people to act in alignment with their values. Micromanagement has the opposite effect, diminishing purpose and narrowing the psychological space needed to ignite meaning.

Relationships also play a powerful role. Colleagues, customers, and leaders shape the social elements of work. Teams that collaborate closely and support one another create shared narratives of purpose. Leaders and managers who coach, engage, and genuinely listen help employees connect personal values with organisational goals.

While employees want meaning and purpose in work, it needs to be an authentic lived experience, embedded into everyday practices, behaviours, and decisions. Organisations that use purpose as a slogan, a "tick-box exercise", risk losing talent and driving disengagement.

Advancements in technology add a new dimension. AI offers the potential to automate low-meaning, repetitive tasks and personalise work to individuals' strengths. However, if it is used to monitor, control, or deskill workers, it risks eroding the psychological foundations of meaning. The future of work will depend on whether organisations use technology to empower people or to constrain them.

Cultivating meaning and purpose requires workplaces that support autonomy, growth, and alignment with personal values. Organisations that are purpose-rich, values-aligned, and human-centred will be best positioned to thrive, but only if leaders intentionally shape the everyday conditions that allow meaning to emerge. As a leader, when was the last time you asked yourself or your team, "What would make this work feel more meaningful?" The challenge is then to act on it.

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Global Workplace Happiness Report

Clarity

In 2016 an illuminating, if slightly sadistic, study found that subjects found it less stressful to know they were definitely going to receive a mild electric shock than the uncertainty of a 50% chance of getting one.[59] Anyone who has been part of an organization in transition will be familiar with that stress of not knowing, and leaders should consider it when they debate how much information to share with their teams.

Clarity sits within the Engagement area of the model. It looks at the Rational area of the brain, which operates at a slower speed than our instincts, allowing us to go through our thought process and consider our options.

The Global Workplace Happiness Survey explores safety with three questions:

1. How clear are you on the requirements of your job?
2. How clear is the link between your role and the success of the organisation?
3. How well does your organisation keep you informed?

Based on over 245,000 data points, Clarity is the second-highest-scoring theme in the survey. It is a weak driver of happiness, but information flow has a considerable impact on productivity.

	How clear are you on the requirements of your job?	How clear is the link between your role and the success of the organisation?	How well does your organisation keep you informed?
Seniority			
Executive leadership	7.6	7.4	6.9
Strategic management	8.1	7.9	7.2
Operational management	8.2	7.8	7.3
Professional/Specialised contributors	8	7.5	6.9
Entry level	7.8	7.5	7.1
Tenure			
0-2 years	8.2	7.7	7.4
2-5 years	8.2	7.7	7.2
5-10 years	8.0	7.5	6.9
10+ years	8.1	7.6	7.1
Work style			
Field-based	7.9	7.4	6.7
Office	7.9	7.4	6.9
Hybrid	7.9	7.6	7.2
Remote	8.2	7.8	7.5
Gender			
Female	8.0	7.5	7.0
Male	8.1	7.7	7.1
Age			
19 - 29	7.9	7.3	6.8
30 - 39	7.9	7.4	6.9
40 - 49	8.0	7.6	7.0
50 - 59	8.0	7.5	7.0
60+	8.3	7.7	7.4
Company size			
10 and under	8.0	7.8	7.2
11-50	7.8	7.5	6.6
51-250	7.8	7.4	6.6
251-1000	8.2	7.5	7.0
1000 +	8.4	7.8	7.5

- **Job requirements** is the highest-scoring question in the Clarity theme and one of the highest in the entire survey. People know what is expected of them. But in the key driver analysis, it is also one of the weakest predictors of happiness, sitting in the bottom three alongside workload management and colleague energy. The same pattern holds for intention to remain, perceived pay fairness, and eNPS. This makes role clarity the clearest example of a hygiene factor in the dataset: its absence would cause problems, but its presence does almost nothing to move the needle on the outcomes organizations care about most.

- **Organizational impact** is the link between an individual's role and the success of the organization, and it scores solidly but a step below job requirements. The gap between the two is instructive. People understand what they are supposed to do, but can be less certain that it matters. Seeing the connection between effort and outcome is where clarity begins to shade into purpose, and the modest drop from requirements to impact suggests that many organizations succeed at defining tasks but fall short of explaining why those tasks matter.

- **Information flow** is the lowest-scoring Clarity question and the one that behaves most differently. While still an operational dimension, being kept informed ranks among the top drivers of perceived team productivity; it's third overall, behind only team enjoyment and collaboration. The contrast with its weak influence on happiness and eNPS is revealing: information flow is a performance lever, not an emotional one. Where information flow breaks down, the cost shows up in coordination failures and duplicated effort rather than in disengagement.

Themes from comment analysis

Within the theme of Clarity, the rational brain relies on transparent, consistent, and predictable information to feel secure and engaged.

On an individual level, employees generally possess a strong sense of purpose; they understand their day-to-day tasks and clearly see how their work impacts the end customer and contributes to the organization's success. This intrinsic clarity supports workplace happiness, particularly for frontline and operational staff.

I know what's expected of me, and I know why it matters. The team keeps me in the loop, and I can see how my work connects to the bigger picture. That clarity helps me stay focused, and it reminds me that what I do actually makes a difference.
(Media, Philippines, 1,000+)

However, organizational clarity, typically how information flows from the top down, is a major source of cognitive friction. The data reveals widespread frustration with poor communication from leadership. Employees frequently report being blindsided by sudden organizational changes, restructures, or redundancies, learning about critical updates through the "grapevine" or external channels rather than official internal communications. This lack of transparency triggers uncertainty and disengagement.

Communication from senior executives is virtually non-existent on issues that matter to the workforce. When we do receive communication, it reads as though it's been generated by AI and rarely imparts any information that's of assistance.
(Female, Legal, UK, 51–250)

Furthermore, chronic understaffing across various industries has led to severe "scope creep." Employees note that their job descriptions no longer match reality, as they are forced to absorb the duties of multiple roles without corresponding recognition or compensation. Finally, siloed working environments hinder lateral clarity; departments frequently fail to communicate with one another, leading to conflicting priorities and inefficiencies.

Ultimately, while employees know how to do their jobs, they need leaders to provide clearer strategic direction, update job boundaries, and foster transparent, cross-departmental collaboration to achieve true organizational clarity.

My official requirements are made quite clear but my job role requires me to take on many more responsibilities to make my workplace succeed and keep running... the expectations of myself and the workplace are always in question.

(Male, 19–29, Food & Beverage, 1,000+)

Demographic splits

- **Age.** Clarity is one of the most stable themes across the age spectrum. Job requirements scores barely move from the youngest to the oldest cohort, and role-to-organization impact is similarly flat. The one dimension with meaningful variation is information flow, where the youngest and oldest workers report notably higher scores than the mid-career groups. The mid-career dip on information flow likely reflects the experience of being deep enough into an organization to notice where communication breaks down, but not senior enough to sit closer to the source.

- **Company size.** The largest firms lead on all three Clarity questions, with the widest advantage on information flow, the dimension where organizational infrastructure matters most. Mid-sized firms sit at the bottom on both information flow and job requirements, extending the structural trough visible across other themes. As firms grow past that point of natural visibility but before they build formal communication systems, clarity suffers.

- **Gender.** Men outscore women modestly on all three questions, with the gap narrowest on job requirements and widest on organizational impact. On information flow, the gap is modest, reinforcing that Clarity is one of the more gender-neutral themes in the data – the operational dimensions of work are experienced more evenly than the cultural ones.

- **Seniority.** Clarity peaks at operational management and drops at both ends of the hierarchy. Operational managers report the highest scores on all three questions, seeming to understand their roles, see how their work connects to the organization, and feel well-informed. Executives (albeit not CEOs) report the lowest job requirements clarity and the lowest information flow of any seniority level, despite their proximity to strategy.

The executive role is often defined by ambiguity, competing priorities, and information that is political rather than operational. Entry-level employees sit in the middle, with reasonable role clarity but weaker visibility into how the organization communicates and how their work fits the bigger picture.

- **Tenure.** Job requirements clarity holds up well over time as one of the few dimensions in the survey that barely erodes with tenure. People continue to understand what is expected of them regardless of how long they've been in the organization. Information flow, however, follows the familiar downward slope, dropping steadily from the honeymoon period onward and never recovering. The link between role and organizational impact also dips in the mid-tenure years before partially recovering, suggesting that the sense of strategic relevance fades as routines set in, then returns for those who settle into more senior or embedded positions.

- **Work style.** Remote workers report the highest clarity scores across all three questions, with the largest advantage on information flow, which inverts conventional assumptions about remote work and communication. Field-based employees sit at the bottom, particularly on information flow, where the gap between remote and field-based workers is among the widest in any demographic comparison on any question. The pattern suggests that remote work environments have developed more deliberate, structured communication practices, such as documented expectations, written updates, and regular check-ins, that produce better clarity outcomes than the informal, ambient information flow of an office or the near-total communication void of the field.

References

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Let's be Clear: Clarity is Capital
Spotlight: manda Henwood

Dr. Amanda Henwood is principal behavioural scientist at Influence at Work.

Discussions of workplace happiness often focus on compensation, flexibility, or team culture. Yet, one of the most powerful and overlooked drivers is far simpler: clarity.

The workplace has always been fraught with uncertainty, and now, perhaps more so than ever. Hybrid working has blurred boundaries; digital tools have multiplied messages without necessarily improving understanding. Employees are asked to absorb more information, more quickly, and often with less context. In the face of such uncertainty, we're all left searching for a way to cut through the mud.

Clarity helps us do this. It helps us understand what is expected of us in our roles, what is going on in the company more generally, and how our work connects to the broader picture. This helps reduce background noise so that employees can tune into what really matters. Think of it as blinkers that help narrow our attention and focus our vision.

There are several ways to achieve clarity in the workplace. It can emerge through clear role definitions and delivery expectations, transparent communication from leadership, communications that help employees see how their work fits into the bigger picture, and clear processes for hiring, rewarding, and recognising employees.

As organisations scale, relational networks expand and progression paths become more complex, making clarity an even stronger priority.

The impact of lacking clarity is stark. People experience a kind of cognitive smog: time is lost to second-guessing priorities, as they hedge against imagined risks, and try to read between the lines. Leaders often slip into micromanagement – not out of malice, but uncertainty and fear of missing the mark – duplicating effort and burning through already limited resources.

Without clear criteria, decisions about hiring and promotion drift towards subjective judgement, increasing the risk of bias and unfairness. Over time, this corrodes trust in organisational decision-making and weakens the informal systems of governance that depend on shared understanding rather than written rules. The result is predictable: motivation drops, stress rises, and the organisation quietly pays the price. Those experiencing clarity, on the other hand, feel more in control. Clear goals and boundaries help them decide how best to act, rather than waiting for instruction or approval. This matters because wellbeing is not simply about feeling good; it is also about feeling free and able to make choices within clear limits.

When people understand what success looks like and where the guardrails sit, they make faster decisions, prioritise more effectively, and are more willing to take responsibility. Clarity reduces the emotional tax of uncertainty and replaces it with a sense of agency. Employees who feel competent and purposeful are more likely to engage deeply with their work, and less likely to disengage.

As a result, the organisational consequences to clarity are significant. Firms that prioritise clarity tend to see higher engagement, lower turnover, and stronger performance.

Happiness and performance are mutually reinforcing. Reduced ambiguity lowers stress, while increased autonomy raises motivation. Together, they improve output. Well-defined roles, goals, and delivery expectations reduce wasted effort and duplication.

Leadership capacity frees up and decision-making accelerates because fewer questions arise. Teams become more resilient, as individuals are better equipped to act independently when conditions change. Retention improves, lowering recruitment and training costs in already tight labour markets.

In short, clarity improves the efficiency with which human effort is converted into value and satisfaction. The case for clarity is especially strong in hybrid and flexible working models because physical distance amplifies ambiguity; what once could be inferred i nformally now requires explicit communication. Those that succeed use clarity as a stabilising force, enabling flexibility without loss of direction.

There's a final, broader implication to clarity that amplifies its impact on individual wellbeing and productivity, and that's trust. Clarity signals competence and care, both of which are fundamental to building trust. But it also signals fairness and consistency. When expectations, standards, and decision criteria are clear, people understand not just what decisions are made, but why. Employees who trust and feel trusted by their employers are more likely to take ownership, make decisions with confidence, and stay engaged, and they are also more likely to remain loyal to the organisation, further strengthening retention and long-term performance.

Clarity is not a managerial nicety. It is a wellbeing intervention, a performance lever, and a governance tool rolled into one. By setting clear expectations, decision rights, and standards of success, clarity enbles organisations to guide behaviour at scale without excessive control. In a volatile economic environment, where attention is scarce and uncertainty abundant, organisations that invest in clarity are better placed to support their people, manage risk, and outperform their peers.

So how do you know whether your organisation has a clarity problem?

The warning signs are often subtle before they become systemic. Look out for creeping micromanagement, inconsistent standards across teams or projects, and a growing sense of distrust, either in leadership decisions, formal processes, or, more quietly, between colleagues themselves. A demotivated workforce is another signal, particularly when effort no longer feels proportionate to reward or recognition.

One of the simplest tests is also the most direct: ask people. If you track employee feedback already, this is exactly the place to probe whether expectations feel clear.

Where confusion exists, seek to rectify it. For a quick win, start small and targeted. Pick one core process – all team meeting communications, performance evaluations, or hiring decisions – and write down, in plain language, what good actually looks like. Not the aspirational version, but the one you can imagine seeing (and ideally have seen) day to day. Now share that understanding, and have employees feed into it where necessary.

Clarity does not always require more rules or longer documents; it requires shared understanding. Making the implicit explicit is often enough to reduce friction, rebuild trust, and boost motivation.

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Personal Growth

Our individual ambitions and definitions of success may vary, but we all want to grow, or at least feel that there's an opportunity to do so.

Some people embrace training for example, while others simply appreciate that it's there for the taking.

Personal Growth sits within the Engagement area of the model. It looks at the Reflective area of the brain, which focuses on our mental and emotional ability to "step back" and consider our Instinctive, Emotional and Rational responses.

The Global Workplace Happiness Survey explores safety with three questions:

1. How satisfied are you with the amount of challenge in your role?
2. How satisfied are you with the amount of learning opportunities on offer?
3. How satisfied are you with the opportunity to progress your career here?

Based on over 220,000 data points, Personal Growth is the lowest-scoring theme in the survey and one of the most powerful drivers of the outcomes organizations care about.

	How satisfied are you with the amount of challenge in your role?	*How satisfied are you with the amount of learning opportunities on offer?*	*How satisfied are you with the opportunity to progress your career here?*
Seniority			
Executive leadership	7	6.6	6.4
Strategic management	7.4	7	6.8
Operational management	7.4	7.3	7
Professional/Specialised contributors	6.9	6.7	6.2
Entry level	6.9	6.9	6.3
Tenure			
0-2 years	7.3	7.2	6.9
2-5 years	7.1	7.0	6.5
5-10 years	6.9	6.7	6.2
10+ years	7.0	6.7	6.3
Work style			
Field-based	6.6	6.4	5.9
Office	6.8	6.6	6.2
Hybrid	7.1	7.0	6.4
Remote	7.2	7.2	6.7
Gender			
Female	6.7	6.7	6.2
Male	7.0	6.8	6.4
Age			
19 - 29	6.6	6.6	6.1
30 - 39	6.7	6.6	6.1
40 - 49	6.8	6.7	6.2
50 - 59	6.8	6.7	6.2
60+	7.2	7.3	6.8
Company size			
10 and under	6.6	6.6	6.2
11-50	6.4	6.3	5.9
51-250	6.6	6.4	5.9
251-1000	7.0	6.8	6.4
1000 +	7.4	7.3	6.8

- **Challenge** scores in the lower-middle tier of the survey. Of the three Personal Growth questions, it is the highest-scoring and probably the least actionable except at the direct manager level. Most people feel adequately stretched by their work. In the key driver analysis, challenge sits in the middle of the pack for happiness and engagement, neither powerful enough to rank among the top drivers nor weak enough to be dismissed. When it's present, it contributes to the experience of work; when it's absent, the role feels stale. Challenge keeps people engaged in the task without necessarily keeping them engaged in the organization.

- **Learning opportunities** scores lower than challenge and begins to expose the structural deficit that defines this theme. The question measures whether the organization actively invests in expanding what people can do and whether there is a deliberate pathway for development. It sits in the upper-middle range of the key driver analysis for happiness, and among the stronger predictors of perceived pay fairness. People who see opportunities to learn are more likely to feel fairly compensated, reinforcing the finding that the perception of reward is filtered through the broader sense of whether the organization is investing in them.

- **Career progression** is the lowest-scoring question in the Personal Growth theme and among the lowest in the entire survey, sitting alongside feedback frequency and inspiration at the bottom of the global rankings. But its influence is outsized. Career progression is the single strongest predictor of whether someone feels fairly rewarded. It also sits in the upper tier for happiness, retention, and eNPS. The gap between its importance and its delivery is second only to inspiration as the most consequential deficit in the data. When people cannot see where they are going, the dissatisfaction bleeds into everything else: how fairly they feel paid, how inspired they feel, how long they intend to stay. This is the question where the future-orientation of the employment relationship is most visible, and where organizations are most clearly falling short.

Themes from comment analysis

The comments on Personal Growth describe a workforce that is highly motivated to learn, stretch their capabilities, and contribute meaningfully to their organizations.

Across all demographics, employees equate personal growth with job satisfaction; when they feel they are stagnating, engagement plummets.

On a positive note, many employees celebrate the dynamic nature of their work. They thrive in environments where "every day is a school day" and appreciate employers who invest in structured learning, such as apprenticeships, leadership academies, and online platforms (e.g., Coursera, LinkedIn Learning). Strong, supportive line managers who carve out time for one-to-one development conversations are frequently highlighted as the key differentiator between a good job and a great career.

> *I feel challenged most days I come to work (in a good way)... I am very satisfied with the learning opportunities, career growth potential, and the challenges in my role—they keep me motivated and engaged.*
> *(Senior Manager, IT, US, 40–49)*

However, three significant barriers to personal growth emerge from the data. The most prominent is time scarcity. Across almost every industry, employees report that heavy workloads and understaffing make it impossible to utilize the learning resources their companies provide. Training is often relegated to personal time, leading to burnout.

> *Learning and progression opportunities exist, but sustained workload, extensive meetings, and constant delivery pressure significantly limit the time and headspace needed to access them.*
> *(Healthcare, UK)*

Secondly, employees can be deeply frustrated by opaque progression pathways. Many describe flat organizational structures where promotion relies on a "dead man's shoes" scenario (waiting for someone to leave) or, worse, favoritism and nepotism.

Finally, there is a distinct trend of neglect toward older employees and those with long tenure.

Workers over 50 frequently report that training and development opportunities "dry up," leaving them feeling sidelined and undervalued in the later stages of their careers.

> *There seems to be no solid framework for job roles or promotion in the business except for popularity...there is no clear criteria I have ever been shown that sets out what to do to get to the next level.*
>
> *(Consulting, UK)*

Demographic splits

- **Age.** Personal Growth scores are flat through the core working years and rise only for the 60+ cohort, a pattern that distinguishes this theme from others where a gradual upward curve is visible. The youngest workers report the lowest satisfaction with challenge and learning, while career progression scores bottom out for those in their 30s and 40s, the years when the gap between ambition and opportunity is felt most acutely. For the broad middle of the workforce, Personal Growth registers as a persistent, undifferentiated weakness.
- **Company size.** The largest firms lead on all three questions by a wide margin, with the gap most dramatic on career progression, where enterprise-level organizations outscore mid-sized firms by nearly a full point. Small and mid-sized firms cluster at the bottom, with the 11–250 range recording the lowest learning and progression scores in the dataset. The finding is structural: career pathways, formal training programs, and promotion infrastructure require organizational scale to build and sustain.
- **Gender.** Men outscore women on all three questions, with the widest gap on career progression and challenge. The career progression finding carries particular weight given that progression is the single strongest predictor of whether someone feels fairly rewarded, and women already report feeling less fairly compensated than men.

The gap on challenge is subtler but may reflect differences in the types of work assigned or in how stretch opportunities are distributed, a pattern consistent with the broader acknowledgment deficit where the informal allocation of visibility and development tends to favor men.

- **Seniority.** Personal Growth follows the bell curve, peaking at operational management and dropping at both ends. Operational managers report the highest scores on all three questions, with a particularly strong lead on career progression; they are the group that most clearly sees a path ahead. Professional contributors and entry-level employees share similarly modest scores, though for different reasons: contributors may have plateaued in specialist roles with limited vertical mobility, while entry-level employees are still waiting for the development infrastructure to reach them.
- **Tenure.** Personal Growth erodes more steeply than almost any other theme in the tenure data. New hires report the highest scores on all three questions, with career progression and learning opportunities dropping sharply within the first few years and never recovering. The trajectory is the clearest illustration of the mid-tenure plateau: by the time employees have been in an organization for five years, the initial investment in their development has tapered off, the role has become familiar, and the sense of forward motion has faded.
- **Work style.** Remote workers report the highest Personal Growth scores in the study, leading on all three questions.The pattern suggests that remote workers may benefit from organizational structures that make growth more explicit and deliberate. Field-based employees, detached from the daily rhythms of the organization, appear to fall outside the development conversation entirely, invisible not just to daily management but to the systems that allocate opportunity.

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Global Workplace Happiness Report

Personal Growth at Work: Recognising the Human Challenge
Spotlight: Anne Hsu

GWHR

Ann Hsu is a Lecturer and Associate Professor in Computer Science and Psychology at Queen Mary, University of London.

The idea of personal growth at work may appeal naturally to the intrinsically motivated employee. But it may sound like a push for productivity to those for whom work is a Faustian bargain, a compensated obstacle to personal fulfillment.

Can workplaces offer meaningful growth to all?

The answer is yes, but only when we recognise what work asks of us, not merely as productivity machines, but as full-fledged human beings. The following example is a fictionalised situation that I commonly encounter in my coaching and workshops. Sarah was used to excelling at writing, but was struggling to write a report for her new role. Her task seemed straightforward, to analyse the pros and cons of various strategic options. Yet, Sarah was stuck. Frustrated, she doubted her abilities and wondered if she was cut out for the role.

When we explored the situation, Sarah realised her difficulties lay not in writing the report, but in navigating the conditions surrounding the task: unclear requirements, incomplete or contradicting information, and a tight deadline. Sarah dreaded having to chase colleagues to point out inconsistencies and ask for clarification.

She worried about coming across as pestering and incompetent.

The challenge Sarah faced was not in the task, but in overcoming her own discomfort with uncertainty, asking questions, and navigating relationships. Once Sarah understood the true challenges, she was able to focus on learning how to cut through ambiguity, communicate diplomatically, and seek the clarification she needed. While she received positive feedback on the work itself, Sarah's personal victory, including her newfound confidence to act in uncertain situations and take interpersonal risks, was far more valuable to her.

When the humanly difficult dimensions of tasks go unnamed and unexamined, we can get stuck. Had Sarah been aware from the beginning, "The difficulty isn't just producing the report. It's having the discernment and courage to point out gaps and contradictions, navigating relationships to get clarity, and staying steady under pressure," she could have avoided time spent floundering and been spared unnecessary distress.

Personal growth is more likely when people feel psychologically safe to set intentions for not only what they need to deliver, but also how they'd like to approach their work. We could invite them to reflect on their personal values, strengths, and challenges with questions such as: What would being your best self look like to you?

What values would you find motivating to express here? What might make this task especially hard for you? How can you support yourself when difficulty arises?

Through this reflection, an employee might realise that they struggle with ambiguity, lack confidence to ask questions, or become self-critical or overwhelmed under pressure.

Naming these challenges opens the door to a more tailored conversation about support—what would help this individual meet the task with greater clarity and confidence.

In great stories, heroes struggle not only against outer obstacles, but against inner vulnerabilities, their personal kryptonite. Similarly, we can help people approach their work as heroes of their own making by helping them identify how it uniquely challenges them.

Our growth is supported when we celebrate not only successful outcomes, but also individual victories: when a typically timid person starts speaking up in meetings, or a conflict-averse person learns to constructively disagree.

Personal growth happens when we see work not just for its outputs, but for how it shapes our character. An employee who dislikes detail may take little pride in a perfect spreadsheet, but can still value building their attentional muscle for rigour and precision, especially when it doesn't come naturally. Someone who dreads presentations may never become a public speaker, but by emboldening themselves to speak in front of others, they gain composure and confidence that transfers to other social situations.

Work is also a prime arena for developing interpersonal skills: giving constructive feedback, navigating different viewpoints, collaborating across personalities, and handling conflicts diplomatically. Mastering these skills strengthens our capacity to relate meaningfully and communicate across differences with our loved ones, communities, and society at large.

More than ever, people are seeking meaning in their work. But meaning doesn't reside in the tasks themselves; it emerges from how we engage with them, what they reveal about our values and strengths, and how they stretch our capacities. Encouraging growth and meaning doesn't require new programs or frameworks. It begins with conversations guided by curiosity and the desire to help people connect with what matters to them.

A simple, powerful question to ask in one-to-ones is: "How can you approach this in a way that feels meaningful to you?" Leaders can make this question more accessible by offering a list of values (e.g., learning, curiosity, contribution, autonomy, mastery, connection), inviting employees to notice which feel most energising or resonant. Using value-related prompts helps people articulate what matters to them and opens up an exploration of how those values can be expressed in upcoming tasks. In doing so, leaders enable employees to take ownership of their growth and find meaning in everyday work.

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Enablement

If Meaning and Purpose are the why of work, and Clarity addresses the what, Enablement addresses the how: whether the organization is putting individuals and teams in a position to succeed. Enablement sits within the Engagement area of the model. It stems from the Rational area of the brain, the part concerned with interpretation and execution, in other words, with getting things done.

These are the most practical, operational questions in the survey, and they score solidly, unremarkably, and with almost no influence on the outcomes that matter most.

The Global Workplace Happiness Survey explores safety with three questions:

1. How able are you to manage your workload?
2. How effective do you feel collaboration is in your organisation?
3. To what extent do you have access to the resources you need to support you in your role?

Based on over 170,000 data points, Enablement is the theme that most clearly illustrates the limits of operational competence.

	How satisfied are you with the amount of challenge in your role?	How satisfied are you with the amount of learning opportunities on offer?	How satisfied are you with the opportunity to progress your career here?
Seniority			
Executive leadership	7	6.6	6.4
Strategic management	7.4	7	6.8
Operational management	7.4	7.3	7
Professional/Specialised contributors	6.9	6.7	6.2
Entry level	6.9	6.9	6.3
Tenure			
0-2 years	7.3	7.2	6.9
2-5 years	7.1	7.0	6.5
5-10 years	6.9	6.7	6.2
10+ years	7.0	6.7	6.3
Work style			
Field-based	6.6	6.4	5.9
Office	6.8	6.6	6.2
Hybrid	7.1	7.0	6.4
Remote	7.2	7.2	6.7
Gender			
Female	6.7	6.7	6.2
Male	7.0	6.8	6.4
Age			
19 - 29	6.6	6.6	6.1
30 - 39	6.7	6.6	6.1
40 - 49	6.8	6.7	6.2
50 - 59	6.8	6.7	6.2
60+	7.2	7.3	6.8
Company size			
10 and under	6.6	6.6	6.2
11-50	6.4	6.3	5.9
51-250	6.6	6.4	5.9
251-1000	7.0	6.8	6.4
1000 +	7.4	7.3	6.8

- **Workload management** is among the highest-scoring questions in the survey suggesting that most people feel they can handle the volume. But it is also, without exception, the weakest driver of every output in the key driver analysis. The finding does not mean workload doesn't matter as chronic overload will eventually surface in burnout and attrition. But it means that workload management is a baseline condition, not a differentiator. Getting it right keeps problems at bay, but does little to create the conditions that make people feel happy, committed, or willing to recommend their employer.

- **Collaboration** scores lower than workload management, and it behaves very differently in the key driver analysis. Collaboration ranks second as a predictor of perceived team productivity and sits among the stronger drivers of engagement. The data suggests that collaboration is not primarily a social or interpersonal phenomenon since team enjoyment and colleague energy rank in the lower half of its driver profile. What drives the sense that collaboration is working is inspiration, information flow, and access to resources, a true mix of emotional and structural dimensions. Effective collaboration, in other words, is less about chemistry and more about infrastructure: whether people are motivated, informed, and equipped.

- **Resources** scores in the middle of the Enablement theme. In the key driver analysis, access to resources sits in the mid-range for most outputs, but it is one of the stronger predictors of collaboration effectiveness and team productivity, which makes intuitive sense: people can't collaborate well if they don't have what they need to do the work. However, it ranks low for happiness, retention, and eNPS. Resources are a necessary condition for execution, and an insufficient condition for engagement.

Themes from comment analysis

An analysis of the global comments regarding Enablement reveals a workforce that is deeply dedicated and highly reliant on localized micro-cultures to succeed.

Across all industries and company sizes, the strongest driver of enablement is human connection. Employees consistently praise their immediate colleagues, supervisors, and line managers for stepping in, sharing the burden, and providing emotional and practical support.

Furthermore, when employees are granted autonomy and trusted to manage their own schedules, their sense of enablement rises significantly, fostering a proactive and resilient work ethic.

> *The workload can become a lot although the team is great for support and helping each other out. But when everyone is busy and there is nobody to share the workload with, it becomes more difficult to manage.*
> *(Consulting, 251–1,000)*

However, these strong local safety nets are frequently straining under the weight of macro-organizational failures. The data highlights a critical tension: employees are being asked to do more with less. Chronic under-staffing is the most pervasive issue globally, leading to unmanageable workloads, unpaid overtime, and a high risk of burnout. Employees feel they are constantly "firefighting" rather than engaging in strategic, meaningful work.

> *I am doing the work of 3 people alone, there are no words to say.*
> *(Turkey, 1,000+)*

Although globally the average scores suggest that organizations provide employees with the tools they need to do their jobs, frustration with inadequate resources is not uncommon. From agonizingly slow, outdated IT systems and legacy software to physically broken equipment on the manufacturing and hospitality floors, employees feel their organizations are not investing in the basic tools required for success. Finally, while immediate teams function well, cross-departmental collaboration is often viewed as broken. A siloed mentality, poor interdepartmental communication, and a lack of shared accountability cause severe bottlenecks. Ultimately, employees are successfully enabling each other, but they do not always feel the organization is enabling them.

> *Everyone works in their own corner and tries to pull the blanket to themselves without worrying about the impacts on others...*
> *(Engineering, France, 251–1,000)*

Demographic splits

- **Age.** Enablement is one of the flattest themes in the age data. Workload management barely moves across the lifespan, and resource access is similarly stable. The one dimension with any meaningful variation is collaboration, where the youngest workers report notably lower scores – possibly reflecting less organizational fluency or fewer established working relationships. The overall story is that enablement is experienced as a constant: the mechanics of work function similarly regardless of career stage.

- **Company size.** The largest firms lead on workload management and resource access, while mid-sized firms sit at the bottom, extending the structural trough visible across every theme. On collaboration, however, the pattern shifts: micro-businesses outperform every group except the largest, and the mid-sized trough is at its deepest. This makes intuitive sense as collaboration in a 10-person firm is a conversation; in a 200-person firm without the right infrastructure, it becomes a coordination problem. The largest firms have presumably invested in the systems and processes that make cross-functional work manageable at scale; mid-sized firms are caught in the gap between informal coordination and formal infrastructure.

- **Gender.** Men outscore women modestly on all three questions, with the gap narrowest on resource access and slightly wider on workload management and collaboration. This is one of the smaller gender differences in the survey. The operational dimensions of work are experienced more similarly across genders than the cultural and emotional dimensions that dominate other themes.

- **Seniority.** Enablement breaks the bell curve that dominates other themes. Entry-level employees report among the highest scores on collaboration and resources – higher than executives on both. Executives, in fact, sit at the bottom of every Enablement question, with the lowest workload management, the lowest collaboration, and the lowest resource access of any seniority level.

- **Tenure.** Enablement follows a mild version of the honeymoon-to-plateau pattern. New hires report the highest scores on all three questions, with collaboration showing the steepest decline over time. Workload management holds up well as people continue to feel they can handle the volume regardless of how long they've been in the organization. Resource access dips modestly in the mid-tenure years. The collaboration decline is the most telling finding: it suggests that new employees arrive into a structured onboarding environment where coordination is facilitated, and then gradually enter the more complex, less curated reality of organizational life where collaboration becomes harder to navigate.

- **Work style.** Remote workers report the highest enablement scores across all three questions, with the widest advantage on collaboration and resource access. The collaboration finding is particularly notable given the prevailing narrative that remote work undermines teamwork; the data says the opposite. Remote workers perceive collaboration as more effective than office-based employees do, likely because the collaboration they experience is more intentional, better documented, and less dependent on the ambient, often unstructured interactions of a shared physical space. Field-based employees, as elsewhere, bear the cost of being outside both the digital and physical infrastructure of the organization.

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Collabureaucracy: The Difference Between Having a Strategy and Delivering It
Spotlight: Dr. Carrie Goucher

Dr. Carrie Goucher has transformed meeting culture in 150+ companies. She has a PhD from the University of Cambridge and is the founder of FewerFasterBolder.

In most organisations, performance is no longer limited by individual capability. It is limited by how work moves between people. Bright, nice people are spending their working day in meetings, only half of which are useful.[60,61]

Collaboration, which should be a 21st-century advantage, becomes the constraint. Why?

For most of the industrial era, we were judged for the speed with which we could finish predictable, repeatable tasks carried out within clear lines of authority. Work moved vertically, decisions were escalated, and though coordination was slow, the work itself was stable. That logic no longer holds.

Today, we create value through knowledge, judgement, and speed of collaboration across boundaries. Yet the way we move work between people remains largely unchanged.

There is a mismatch between how value is created now and how work is organised to deliver it.[62] For example, meetings remain the default mechanism for alignment and decision-making, despite being a time-intensive pattern we inherited from the industrial era.

This is a limiting factor for most organisations because their people are:

- In meetings throughout their day. This atomises their calendar, squeezing out stretches of time required to do deep work and solve complex problems.[63]
- Burning time finding information, aligning stakeholders, reporting on work, translating context across groups, and coordinating diaries, tasks, and dependencies.[64]
- Struggling to disagree in helpful ways, resulting in the paradox of being too risk averse to be truly innovative – and yet many projects don't succeed because risks weren't raised, despite all those meetings.

This is where the idea of "collabureaucracy" is useful. Collabureaucracy describes the accumulation of processes, meetings, channels, hand-offs, and unwritten rules that are meant to help people work together but instead create friction and frustration. No single meeting or process is the problem. The issue is the system of coordination layers that are added over time to manage risk, alignment, and accountability. Each layer made sense at some point to someone. Collectively, they create a heavy cognitive and operational load that people must navigate just to get work done.

Leaders: You can design out "collabureaucracy"

Enablement requires more than better meeting hygiene or new collaboration software. It requires an evolution in how collaboration itself is treated by organisations. **If the industrial era functioned on specialisation or "command and control," the knowledge era functions on these three things:**

1. Just enough structure
2. Act fast, learn "cheap"
3. Adult-to-adult relationships

Here's how to do this in practice

Actively design in just enough structure to create flow, i.e. ways to update each other, solve problems, make decisions, and build trust.[65] Most organisations invest heavily in designing products, services, and customer journeys. Collaboration, by contrast, is often assumed to emerge naturally if capable people are put in a room or a channel together.

Reduce the cognitive nightmare of modern work. In many organisations, people hold a constantly shifting mental map of where things go. What belongs in a meeting versus a document. What should be emailed versus posted in chat. Where decisions are made, recorded, and revisited. This invisible complexity consumes attention. Enablement improves when there are simple, shared patterns for how work flows.[66]

Develop explicit ways to establish healthy, helpful conflict. Collaboration without challenge leads to weak decisions. Conflict without structure leads to defensiveness and drama which in turn means we do not experiment and learn. People need permission and practical methods to disagree, test ideas, and surface risks in ways that feel safe and productive. This includes clarity about decision rights, shared language for raising concerns, and leaders who model regulated, adult-to-adult behaviour under pressure.[67]

Bringing it together

Meetings are one of the most visible places where collaboration succeeds or fails, but they are only a symptom of the deeper issue of collabureaucracy: the accumulation of well-intended coordination that no longer serves the work.
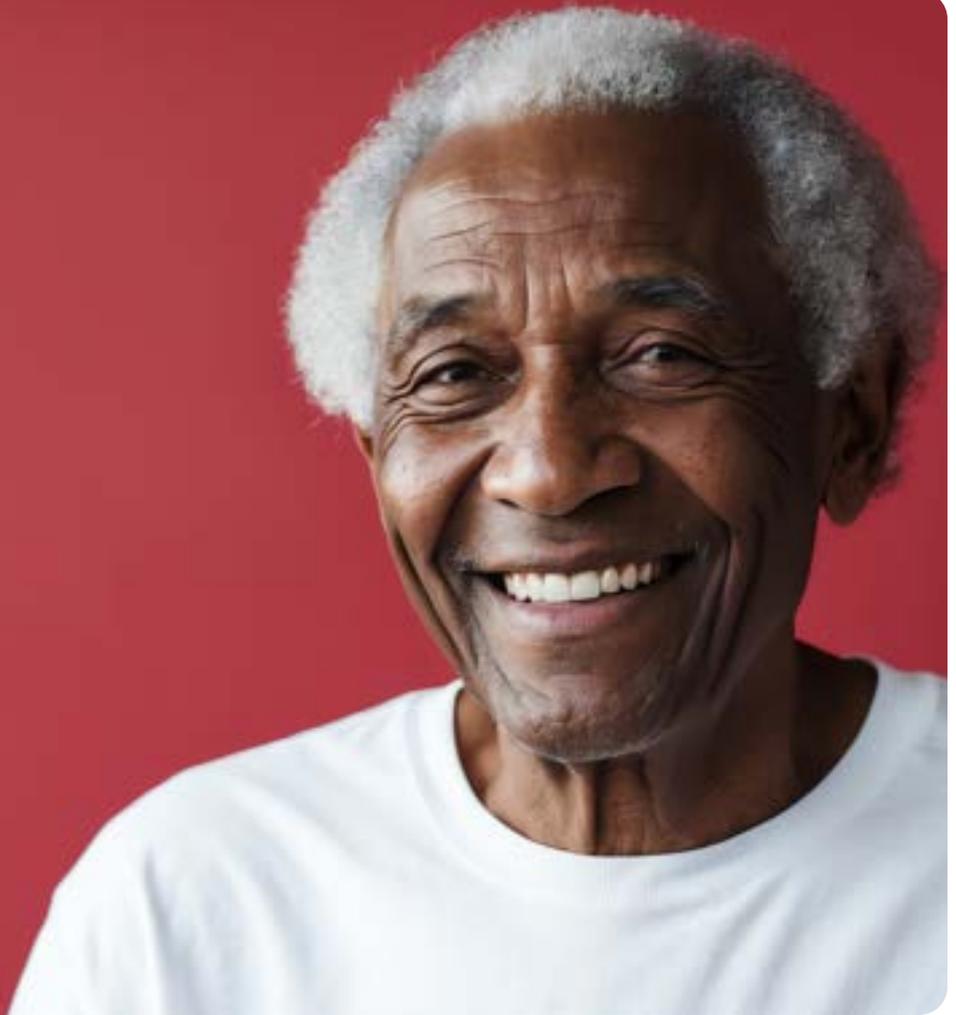
If you want speed, better decisions, and more resilient people, treat collaboration as a system to be intentionally shaped. Designing for it with intention, reducing cognitive load, and enabling healthier conflict are the most practical levers at your disposal for turning effort into progress – and the difference between having a strategy and delivering it.

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Country Snapshots

GWHR
2026

The Happiness Index: Converting culture into business performance

1. Benchmarking your organisation: *Not sure how your culture stacks up?*
Our global benchmark compares your organisation against tens of millions of cultural insights from organisations around the world. Discover your strengths and uncover key focus areas for cultural improvement.

2. Employee engagement platform: *Curious how your people think, feel, and behave?*
Our engagement platform gives a live view of your cultural health. Use research-backed surveys or create your own, then explore insights to see what really drives engagement at every stage of the employee journey.

3. Culture consultancy: *Unsure what's driving impact or where to focus?*
Our consultants turn insights into action. We help you build a culture that boosts performance — from revenue and profit to customer retention. Wherever you want to see results, we help you get there faster.

The
Happiness
Index

Country snapshot profiles

The following section features the top-level scores for 17 countries around the world with over 500 responses in The Global Workplace Happiness Survey. We've added two additional scores for contrast: global averages and peer group.

The **global average** is a blended "average of averages" across the global dataset. This is designed to include every response while ensuring no single country disproportionately influences the global results due to a higher response volume.

The **peer group** average is derived by comparing the average of surveyed countries that rise to both statistical minimums and provide the best regional and/or socio-economic context.

A full description of the approach used to determine the global averages and peer group comparisons is included in **Appendix 1: Methodology of the Global Workplace Happiness Survey**.

In each snapshot, you will find an overview of the **country profile** and an **Overall score**, along with the peer and global averages for comparison. You will also find **Happiness** and **Engagement** scores for each country.

Each snapshot provides a chart of the country's scores across the **neuroscience dimensions**, along with an **eNPS** and **Productivity** rating.

Why not compare individual countries against one another?

Cultural response styles vary significantly across countries. Some populations tend to rate more generously, others more critically, and this survey was not designed to normalize for those differences. Comparing a country's scores to those of structurally similar peers, rather than to any individual country, provides a more relevant benchmark by holding some of that cultural and economic variation constant.

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Country snapshot
Belgium

GWHR

Overview

Belgium leads its peer group by 0.2 to 0.4 points on most metrics, leading the pack in a region where the cultural norm is to score low. The one relative bright spot is retention, where 66.8% are likely to remain, which is 7.8 points above the peer average.
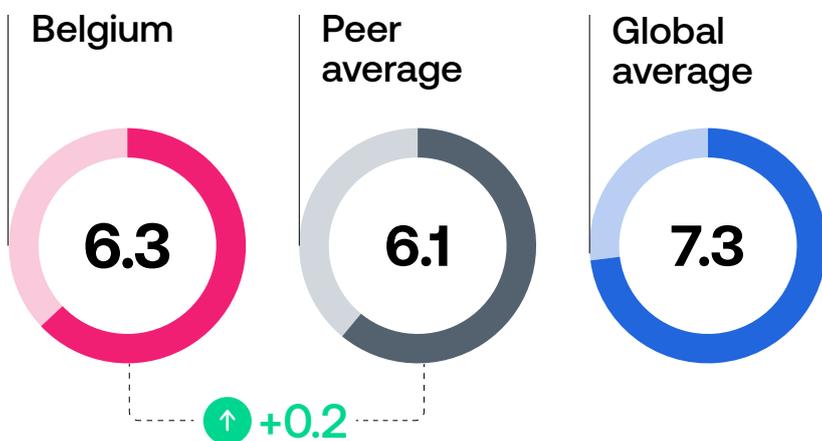
There may be a deeper story in the eNPS score. At -44, Belgium sits with France and Luxembourg at the bottom of the entire global dataset, which could go beyond cultural bias.

Acknowledgement and Personal Growth (both scoring 5.6) could suggest that this is a workforce that feels neither recognized nor mobile.

Peer group explanation: Belgium, France, Luxembourg: Immediate geographic neighbors sharing labor markets, regulatory frameworks (EU core) and to varying degrees, language.

Overall

🔼 Above benchmark   🔶 Equal to   🔻 Below benchmark

Belgium	Peer average	Global average
6.3	6.1	7.3

🔼 +0.2

Happiness

Belgium	Peer average	Global average
6.4	6.1	7.3

🔼 +0.3

Engagement

Belgium	Peer average	Global average
6.2	5.9	7.3

🔼 +0.3

Neuroscience themes

Legend: Belgium | Peer average | Global average

Theme	Belgium	Peer average	Global average
Safety (Instinctive)	6.6	6.2	7.3
Freedom (Instinctive)	6.6	6.2	7.4
Relationships (Emotional)	6.6	6.8	7.7
Acknowledgement (Emotional)	5.6	5.4	6.8
Personal Growth (Reflective)	5.6	5.3	6.8
Meaning & Purpose (Reflective)	6.1	5.7	7.2
Clarity (Rational)	6.6	6.4	7.5
Enablement (Rational)	6.5	6.1	7.6

eNPS

	Belgium	Peer average	Global average
eNPS	−44	−44	+1

Productivity

Belgium	Peer average	Global average
6.7	6.9	7.6

↓ −0.2

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Global Workplace Happiness Report

Country snapshot
Brazil

Overview

Brazil sits consistently below its Latin American peer group, trailing by 0.2 to 0.6 points on nearly every dimension.

While eNPS scores for the entire group are well above the global average, Brazil trails its peers by 9 points. The standout tension is in Personal Growth. At 6.8, it's the only dimension where Brazil merely matches the global benchmark rather than exceeds it, and the gap to the peer group (-0.9) is the largest in the entire profile.

Brazil's workforce feels connected, enabled, and productive, but stuck. The development pipeline isn't keeping pace with the energy around it.

Peer group explanation: Brazil, Mexico, Colombia, Chile: Large Latin American economies with shared language-family ties, similar BPO/services sector growth and comparable workforce demographics.

Overall

⬆ Above benchmark　⮕ Equal to　⬇ Below benchmark

Brazil	Peer average	Global average
7.5	7.9	7.3

⬇ –0.4

Happiness

Brazil	Peer average	Global average
7.6	7.9	7.3

⬇ –0.3

Engagement

Brazil	Peer average	Global average
7.4	7.9	7.3

⬇ –0.5

Neuroscience themes

Legend: Brazil | Peer average | Global average

Theme	Brazil	Peer average	Global average
Safety (Instinctive)	7.5	8.0	7.3
Freedom (Instinctive)	7.5	8.1	7.4
Relationships (Emotional)	8.2	8.1	7.7
Acknowledgement (Emotional)	6.9	7.5	6.8
Personal Growth (Reflective)	6.8	7.7	6.8
Meaning & Purpose (Reflective)	7.4	7.9	7.2
Clarity (Rational)	7.7	8.0	7.5
Enablement (Rational)	8.0	8.2	7.6

eNPS

	Brazil	Peer average	Global average
eNPS	+24	+33	+1

Productivity

Brazil	Peer average	Global average
8.2	8.3	7.6

Brazil vs Peer average: ↓ −0.1

Take part in the 2027
Global Workplace Happiness Report

Country snapshot
Bulgaria

GWHR

Overview

Bulgaria trails the global benchmark on most dimensions but sits comfortably above its peer group, leading on Safety (+0.4), Freedom (+0.4), Productivity (+0.4), and Clarity (+0.3).

At -11, eNPS is negative, but 4 points better than the peer average of -15. Retention is also a relative strength with likely to remain at 6.4 points above peers.

Personal Growth (6.1) and Meaning and Purpose (6.5) show the largest deficits against the global benchmark (both -0.7) and are the only dimensions where Bulgaria doesn't outpace its peers. Clarity scores highest in the entire profile at 7.6, beating the benchmark.

Peer group explanation: Bulgaria, Romania, Turkey, Poland: SE European / near-accession economies with similar GDP per capita, post-transition labor markets, and positions on the EU's economic periphery.

Overall
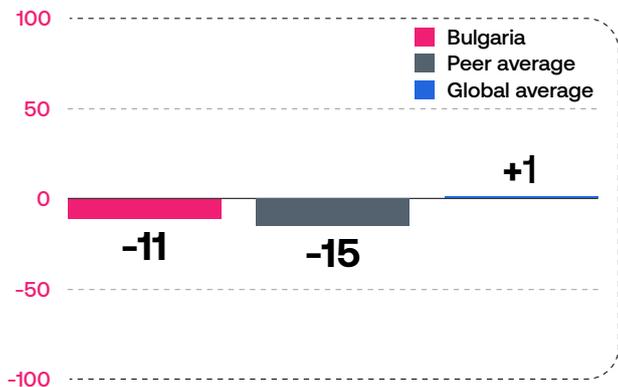
⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

Bulgaria	Peer average	Global average
6.9	6.8	7.3

⬆ +0.1

Happiness

Bulgaria	Peer average	Global average
6.9	6.7	7.3

⬆ +0.2

Engagement

Bulgaria	Peer average	Global average
6.9	6.8	7.3

⬆ +0.1

Neuroscience themes

Bulgaria **Peer average** **Global average**

Theme	Bulgaria	Peer average	Global average
Safety (Instinctive)	7.0	6.6	7.3
Freedom (Instinctive)	7.2	6.8	7.4
Relationships (Emotional)	7.2	7.2	7.7
Acknowledgement (Emotional)	6.4	6.2	6.8
Personal Growth (Reflective)	6.1	6.1	6.8
Meaning & Purpose (Reflective)	6.5	6.6	7.2
Clarity (Rational)	7.6	7.3	7.5
Enablement (Rational)	7.4	7.5	7.6

eNPS

Bulgaria **Peer average** **Global average**

- Bulgaria: **−11**
- Peer average: **−15**
- Global average: **+1**

Productivity

Bulgaria	Peer average	Global average
7.5	7.1	7.6

↑ +0.4

Take part in the 2027
Global Workplace Happiness Report

Country snapshot
Chile

Overview

Chile tracks almost exactly at the peer group average, with most dimensions sitting within a tenth of a point of peers. Freedom (8.0) and Productivity (8.3) are marginal strengths; retention is solid at 82.1% likely to remain.

This is a consistent, tightly clustered profile with no obvious weak spots relative to the region.

Together, Meaning and Purpose (-0.2) and Enablement (-0.2) scores suggest that while Chilean workers are productive and stable, they are less likely than regional counterparts to feel a sense of purpose or to advocate for their employer.

Peer group explanation: Chile, Mexico, Brazil, Colombia: Latin American peers with the strongest formal-sector employment bases and increasingly professionalized service economies across the region.

Overall

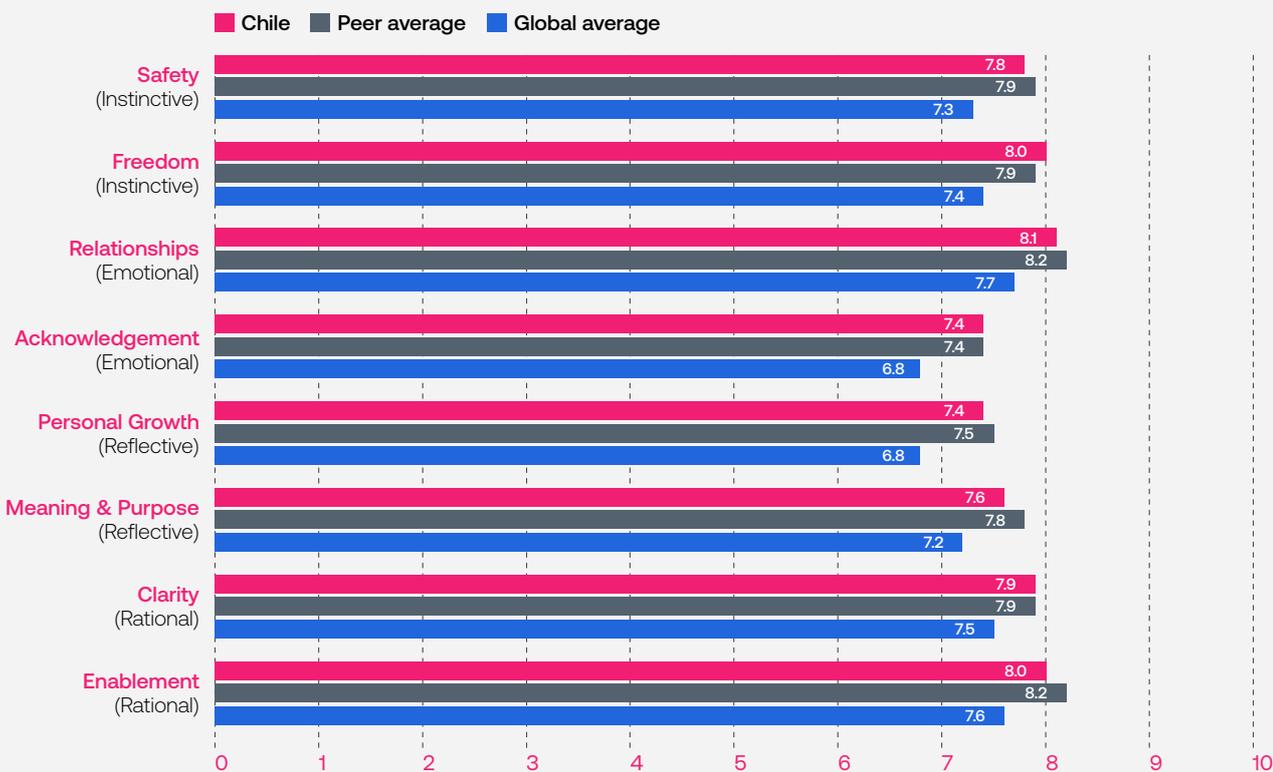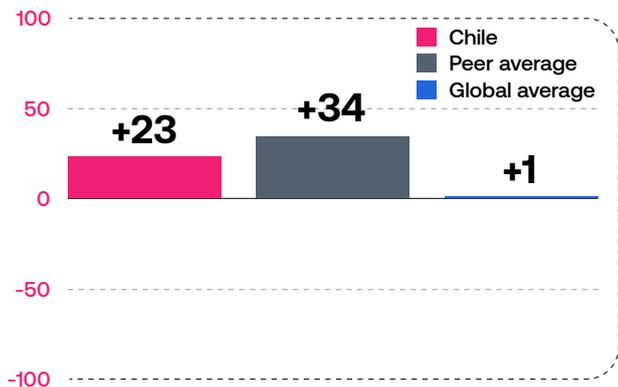⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

Chile	Peer average	Global average
7.8	7.8	7.3

➡ 0.0

Happiness

Chile	Peer average	Global average
7.8	7.9	7.3

⬇ -0.1

Engagement

Chile	Peer average	Global average
7.7	7.8	7.3

⬆ -0.1

Neuroscience themes

Legend: Chile | Peer average | Global average

Theme	Chile	Peer average	Global average
Safety (Instinctive)	7.8	7.9	7.3
Freedom (Instinctive)	8.0	7.9	7.4
Relationships (Emotional)	8.1	8.2	7.7
Acknowledgement (Emotional)	7.4	7.4	6.8
Personal Growth (Reflective)	7.4	7.5	6.8
Meaning & Purpose (Reflective)	7.6	7.8	7.2
Clarity (Rational)	7.9	7.9	7.5
Enablement (Rational)	8.0	8.2	7.6

eNPS

- Chile: +23
- Peer average: +34
- Global average: +1

Productivity

Chile	Peer average	Global average
8.3	8.3	7.6

→ +0.0

Take part in the 2027 Global Workplace Happiness Report

Country snapshot
China

Overview

China trails India (its only peer) by 0.4 to 1.0 points across every dimension, with large gaps in Meaning and Purpose (-1.0), Relationships (-0.8), and Freedom (-0.8). The profile is notably flat, as all eight dimensions cluster between 7.0 and 7.3, the narrowest range in the dataset.

At -14, eNPS sits 40 points below the peer average, the starkest single gap in any country's profile.

The retention numbers tell a specific story. Only 7.2% are likely to leave, but 22.9% are passive, which is by far the highest passive share in the dataset, and 12.7 points above the peer group. Few people are heading for the door, but nor are they committed.

Peer group explanation: China, India: Asian mega-economies with huge workforces, rapid urbanization trajectories, and large knowledge-worker segments alongside dominant manufacturing/services sectors.
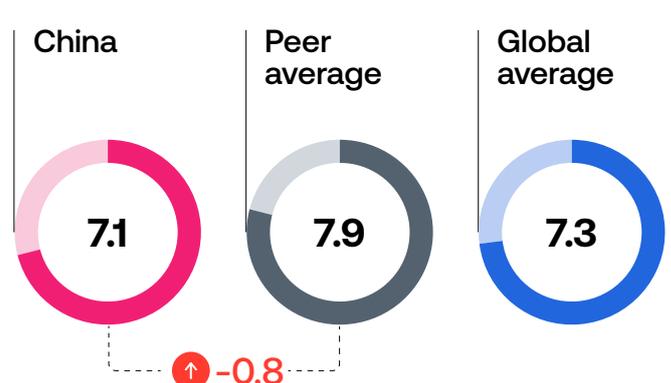
Overall

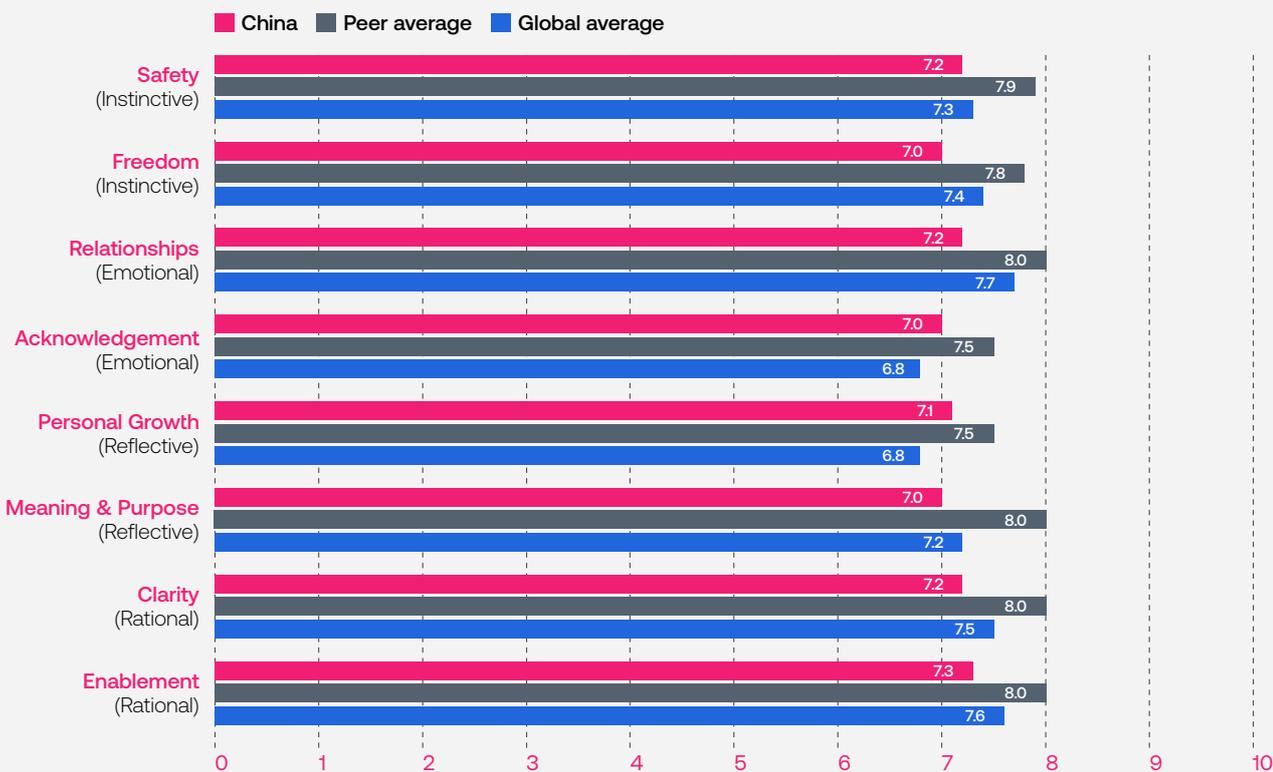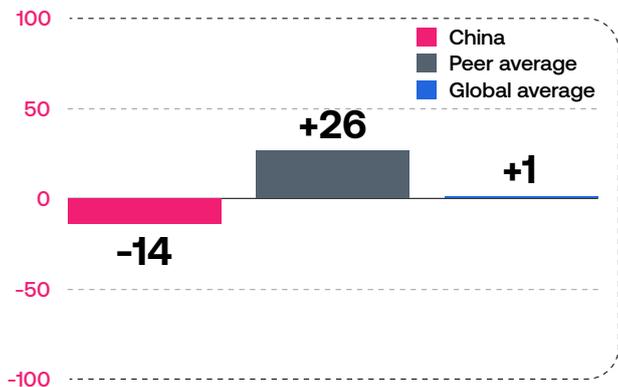⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

China	Peer average	Global average
7.1	7.8	7.3

➡ –0.7

Happiness

China	Peer average	Global average
7.1	7.8	7.3

⬇ –0.7

Engagement

China	Peer average	Global average
7.1	7.9	7.3

⬆ –0.8

Neuroscience themes

■ China ■ Peer average ■ Global average

Theme	China	Peer average	Global average
Safety (Instinctive)	7.2	7.9	7.3
Freedom (Instinctive)	7.0	7.8	7.4
Relationships (Emotional)	7.2	8.0	7.7
Acknowledgement (Emotional)	7.0	7.5	6.8
Personal Growth (Reflective)	7.1	7.5	6.8
Meaning & Purpose (Reflective)	7.0	8.0	7.2
Clarity (Rational)	7.2	8.0	7.5
Enablement (Rational)	7.3	8.0	7.6

eNPS

■ China ■ Peer average ■ Global average

- China: −14
- Peer average: +26
- Global average: +1

Productivity

- China: 7.2
- Peer average: 7.8
- Global average: 7.6

↓ −0.6

Take part in the 2027
Global Workplace Happiness Report

Country snapshot
Colombia

Overview

Colombia leads its peer group across every dimension, with the largest advantages in Acknowledgement (+0.6), Personal Growth (+0.6), and Meaning and Purpose (+0.6). Enablement and Productivity both hit 8.5, the highest in the group.
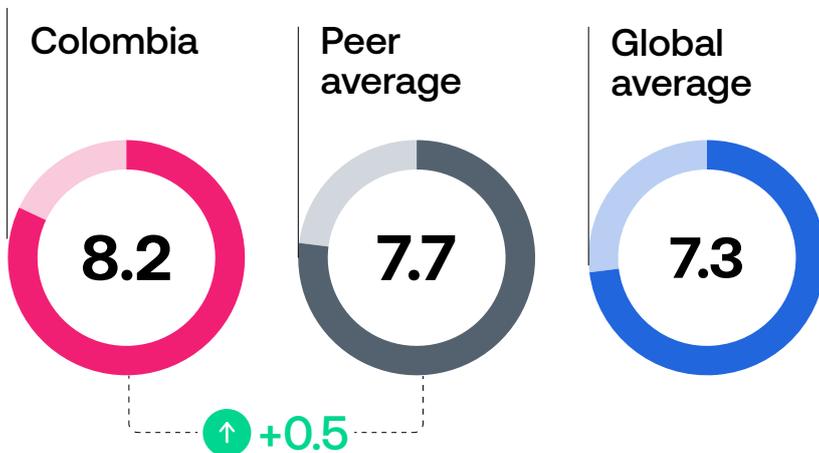
At 46, eNPS is 20 points clear of the peer average and the highest in the entire dataset. Retention follows, with 86.2% likely to remain, nearly 5 points above peers.

The distinctive feature is where Colombia pulls away. The biggest margins over peers aren't in operational dimensions, but rather in recognition, growth, and purpose, which are the weakest globally.

Peer group explanation: Colombia, Mexico, Brazil, Chile: Shared Latin American context with comparable workforce structures, growing BPO sectors, and similar middle-income trajectories.
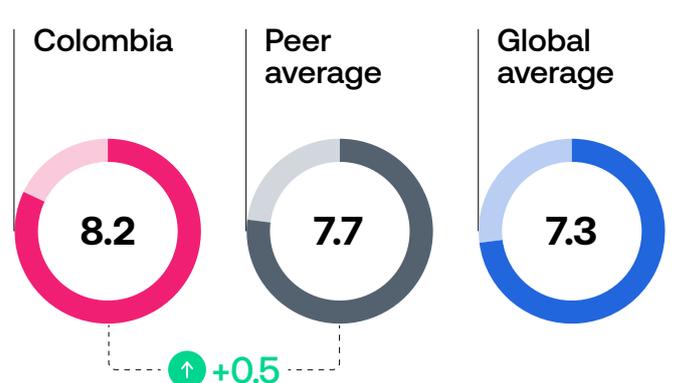
Overall

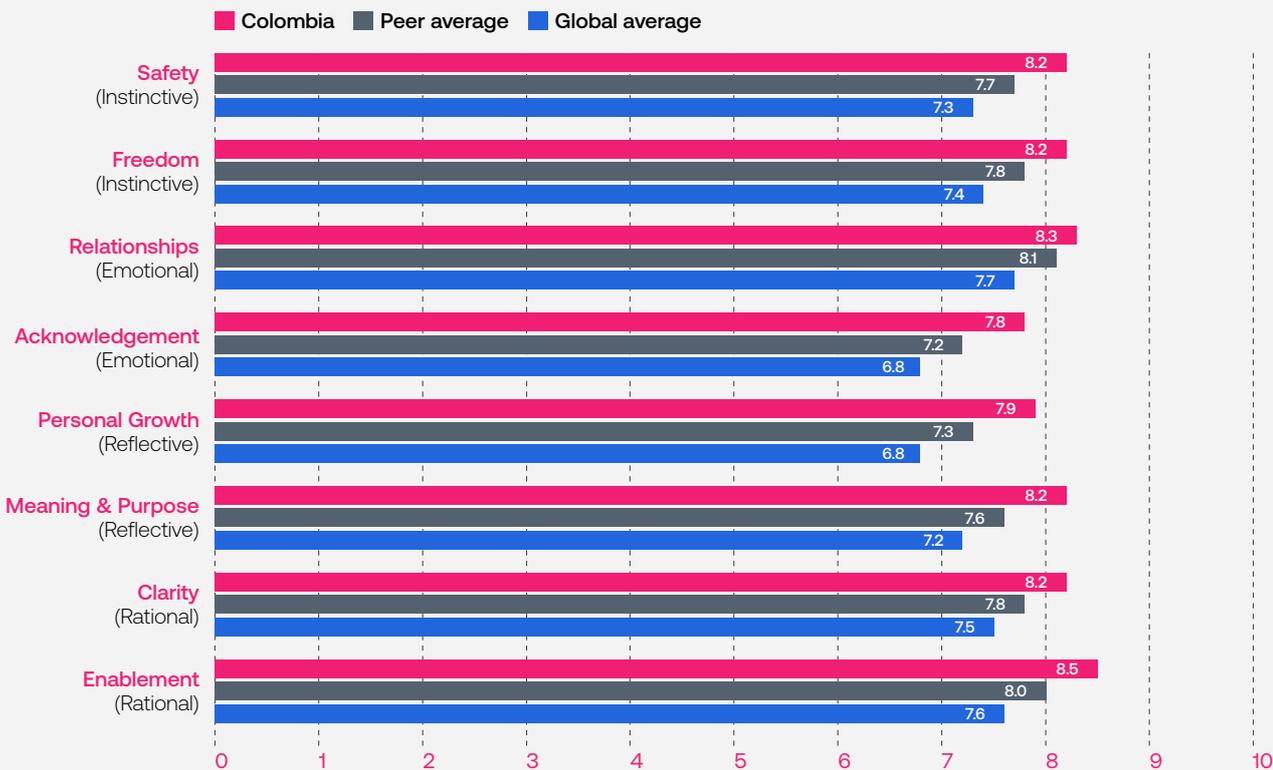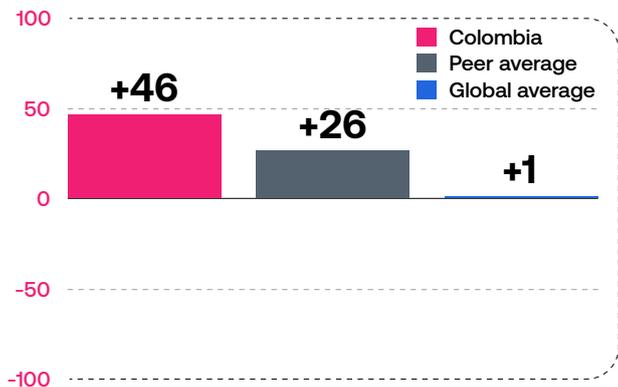⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

Colombia	Peer average	Global average
8.2	7.7	7.3

⬆ +0.5

Happiness

Colombia	Peer average	Global average
8.2	7.8	7.3

⬆ +0.4

Engagement

Colombia	Peer average	Global average
8.2	7.7	7.3

⬆ +0.5

Neuroscience themes

Colombia ■ **Peer average** ■ **Global average**

Theme	Colombia	Peer average	Global average
Safety (Instinctive)	8.2	7.7	7.3
Freedom (Instinctive)	8.2	7.8	7.4
Relationships (Emotional)	8.3	8.1	7.7
Acknowledgement (Emotional)	7.8	7.2	6.8
Personal Growth (Reflective)	7.9	7.3	6.8
Meaning & Purpose (Reflective)	8.2	7.6	7.2
Clarity (Rational)	8.2	7.8	7.5
Enablement (Rational)	8.5	8.0	7.6

eNPS

- Colombia **+46**
- Peer average **+26**
- Global average **+1**

Productivity

Colombia	Peer average	Global average
8.5	8.2	7.6

↑ +0.3

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Global Workplace Happiness Report

Country snapshot
France

GWHR

Overview

France trails its local peers across nearly every dimension. The largest gaps are in Meaning and Purpose (-0.4), Engagement (-0.3), and Personal Growth (-0.3).
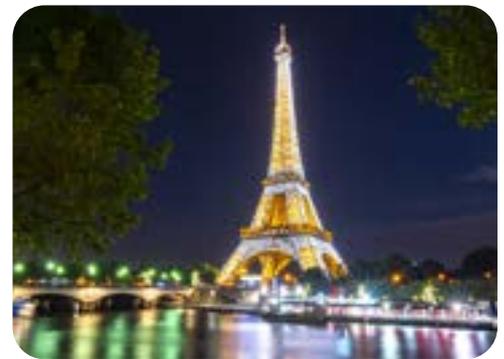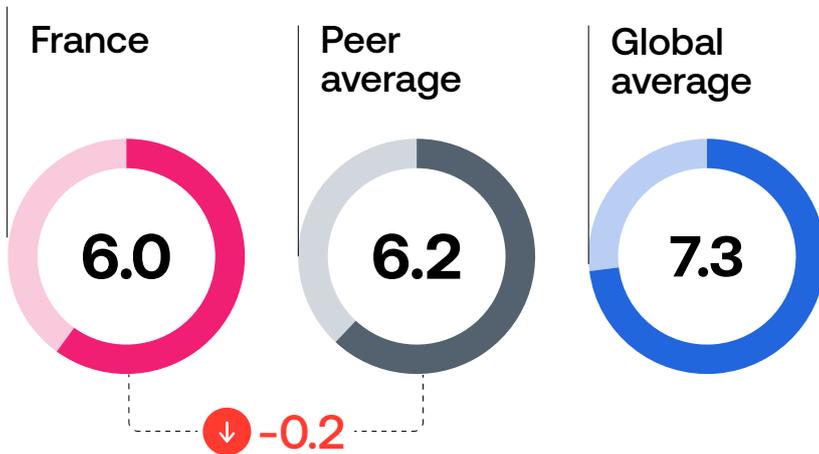
At -46, eNPS is 3 points below the peer average and the lowest in the entire dataset. Relationships at 6.8 is the only dimension where France narrowly outscores its peers.

The Engagement score (5.8) coupled with Happiness (6.1) sharpens the picture. The combination of rock-bottom advocacy with 23.1% likely to leave suggests a workforce that does not – or cannot – connect its employer relationship to its fundamental wellbeing.
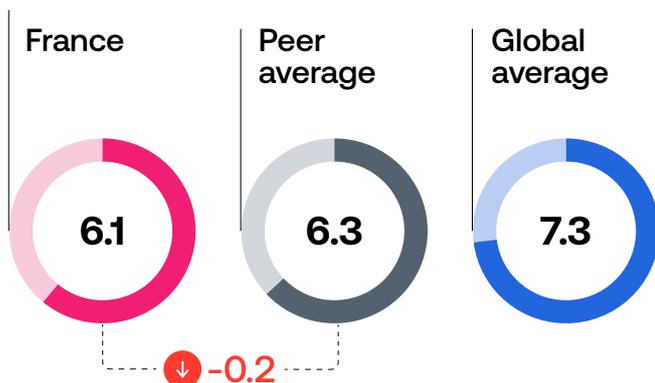
Peer group explanation: France, Luxembourg, Belgium: Western European neighbors with deeply integrated labor markets, a shared EU regulatory environment, and comparable workplace expectations.
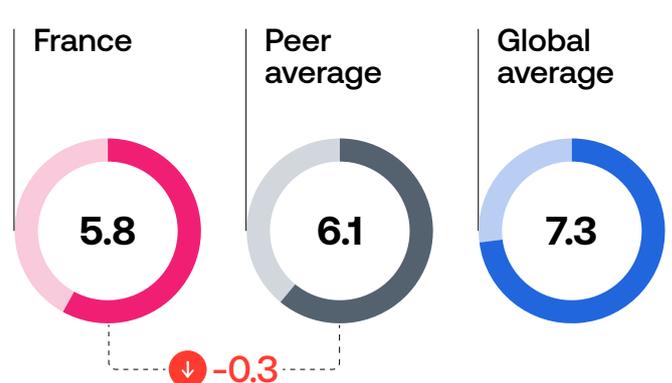
Overall

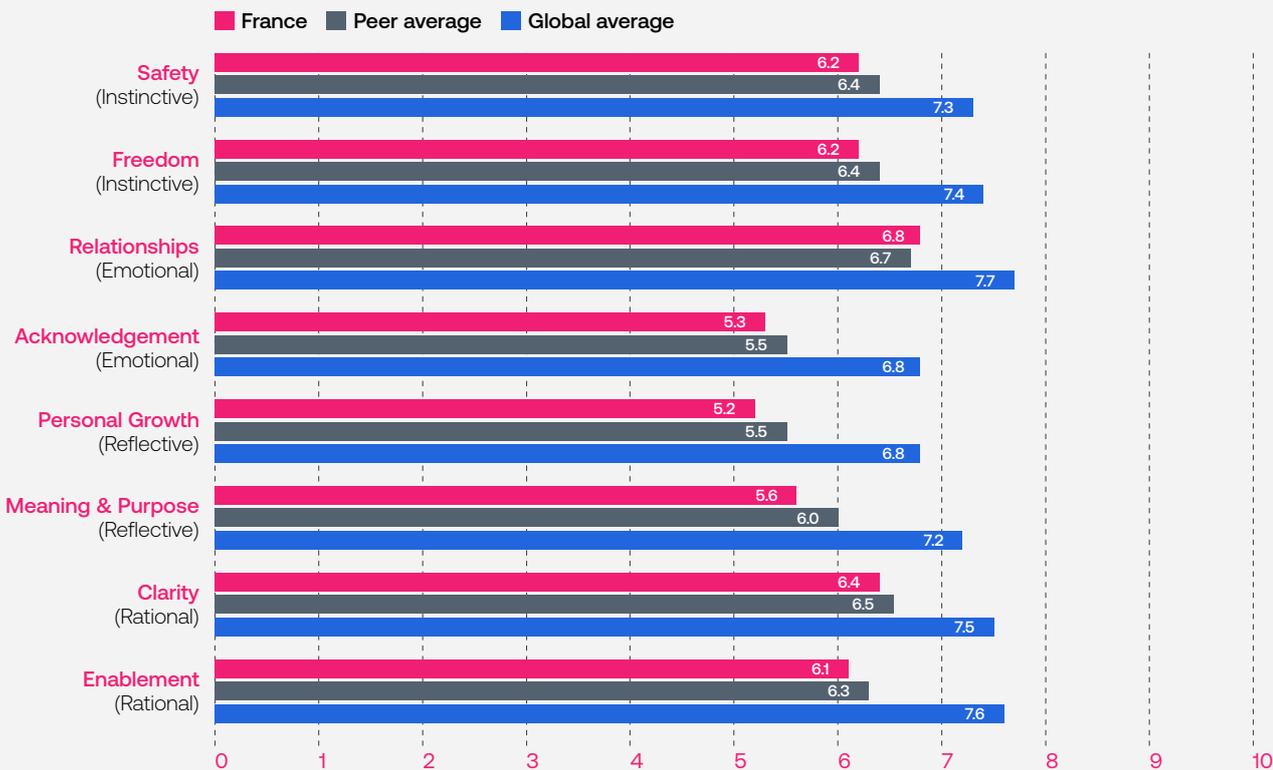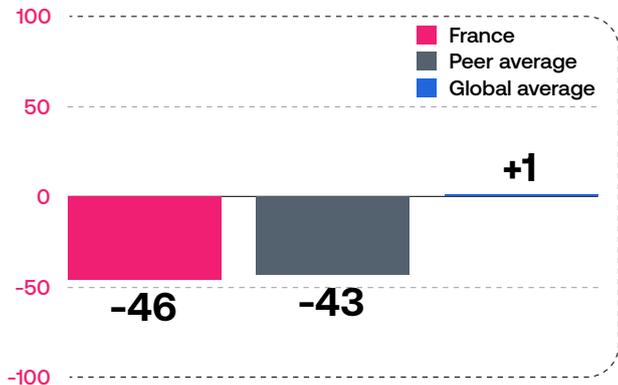⬆ Above benchmark ➡ Equal to ⬇ Below benchmark

France	Peer average	Global average
6.0	6.2	7.3

⬇ -0.2

Happiness

France	Peer average	Global average
6.1	6.3	7.3

⬇ -0.2

Engagement

France	Peer average	Global average
5.8	6.1	7.3

⬇ -0.3

Neuroscience themes

Legend: France | Peer average | Global average

Theme	France	Peer average	Global average
Safety (Instinctive)	6.2	6.4	7.3
Freedom (Instinctive)	6.2	6.4	7.4
Relationships (Emotional)	6.8	6.7	7.7
Acknowledgement (Emotional)	5.3	5.5	6.8
Personal Growth (Reflective)	5.2	5.5	6.8
Meaning & Purpose (Reflective)	5.6	6.0	7.2
Clarity (Rational)	6.4	6.5	7.5
Enablement (Rational)	6.1	6.3	7.6

eNPS

Legend: France | Peer average | Global average

- France: **-46**
- Peer average: **-43**
- Global average: **+1**

Productivity

France	Peer average	Global average
6.8	6.8	7.6

→ –0.0

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Country snapshot
India

Overview

India outscores China by 0.4 to 1.0 points across every metric, with large gaps in Meaning and Purpose (+1.0), Freedom (+0.8), Relationships (+0.8), and Clarity (+0.8). At 26 versus China's -14, eNPS reveals a 40-point gulf – the widest single comparison in the dataset.
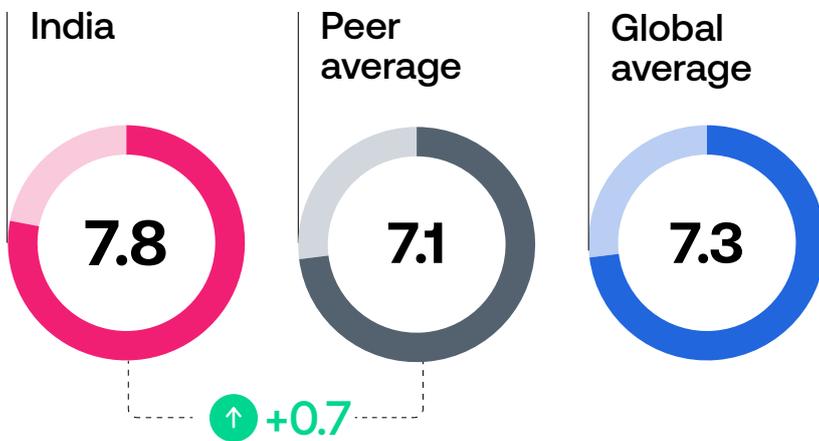
Retention is similarly divergent, with 79.4% likely to remain and only 10.2% passive, against China's 69.9% and 22.9%.

The distinguishing feature is conviction. Where China's profile is flat, India's is both high-scoring and differentiated. Indian workers are more satisfied than their Chinese counterparts and assured in their evaluations.
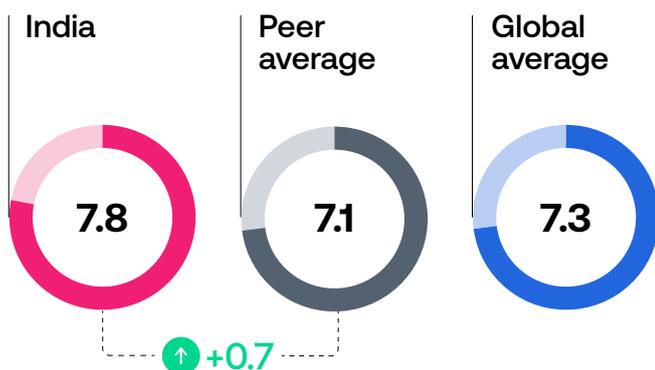
Peer group explanation: India, China: Paired as the two economies with similar workforce scale, rapid digital transformation, and the coexistence of informal and formal labor markets.
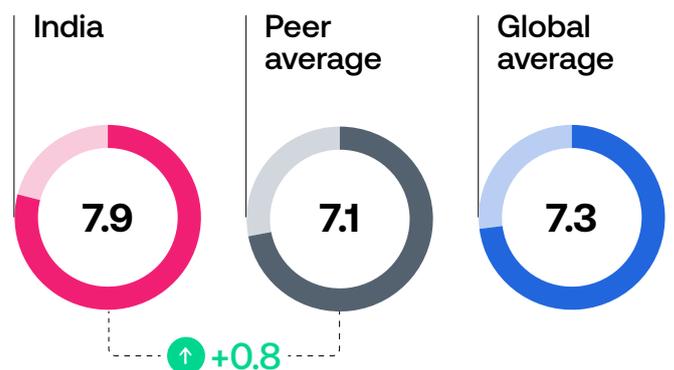
Overall

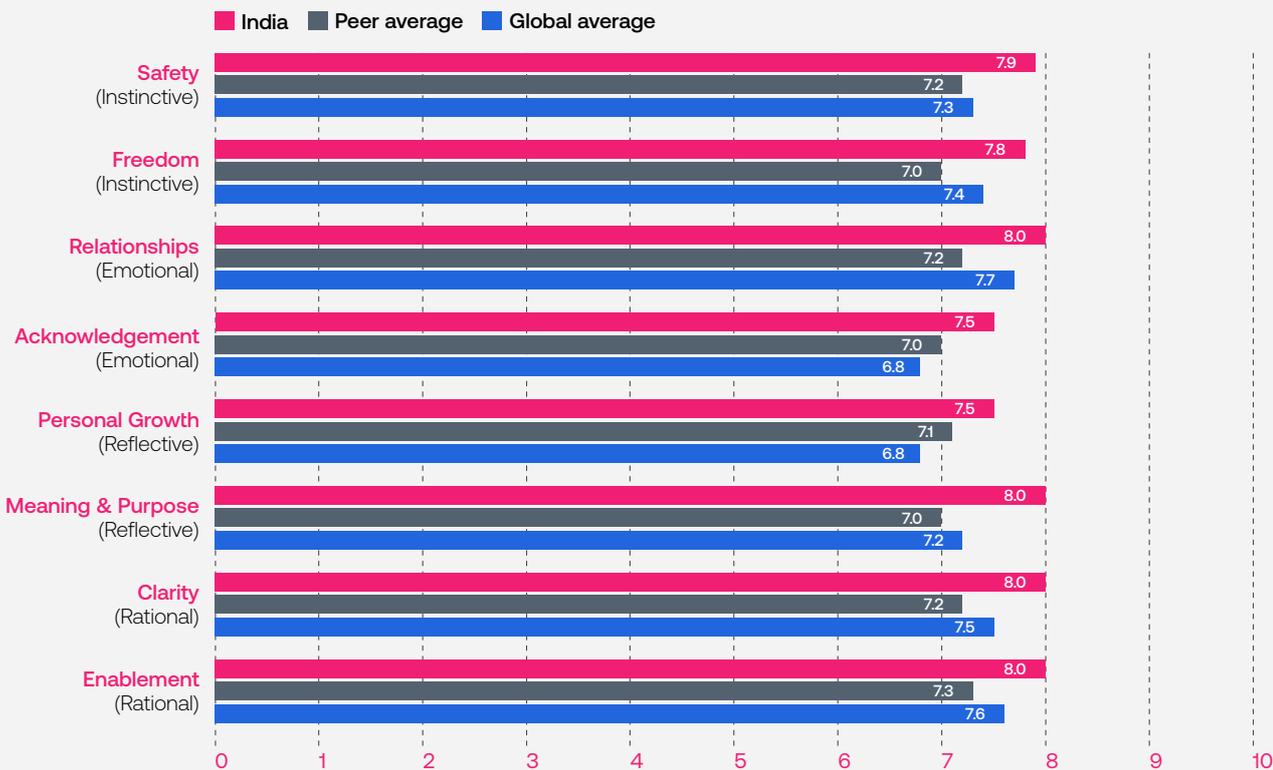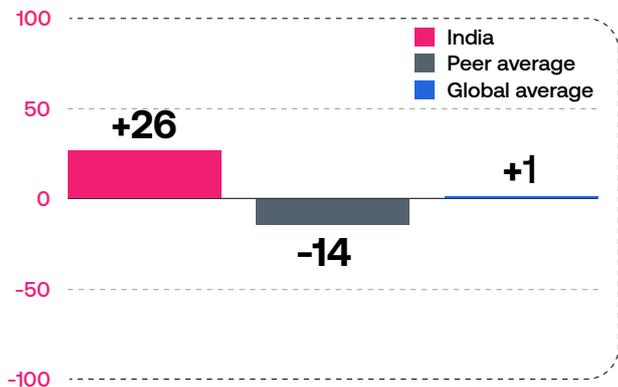⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

India	Peer average	Global average
7.8	7.1	7.3

⬆ +0.7

Happiness

India	Peer average	Global average
7.8	7.1	7.3

⬆ +0.7

Engagement

India	Peer average	Global average
7.9	7.1	7.3

⬆ +0.8

Neuroscience themes

Legend: India | Peer average | Global average

Theme	India	Peer average	Global average
Safety (Instinctive)	7.9	7.2	7.3
Freedom (Instinctive)	7.8	7.0	7.4
Relationships (Emotional)	8.0	7.2	7.7
Acknowledgement (Emotional)	7.5	7.0	6.8
Personal Growth (Reflective)	7.5	7.1	6.8
Meaning & Purpose (Reflective)	8.0	7.0	7.2
Clarity (Rational)	8.0	7.2	7.5
Enablement (Rational)	8.0	7.3	7.6

eNPS

India: +26
Peer average: -14
Global average: +1

Productivity

India: 7.8
Peer average: 7.2
Global average: 7.6

↑ +0.6

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Country snapshot
Italy

Overview

Italy leads Portugal by 0.6 to 1.7 points across every dimension, with the largest separations in Meaning and Purpose (+1.7), Personal Growth (+1.2), Acknowledgement (+1.1), and Relationships (+1.1).
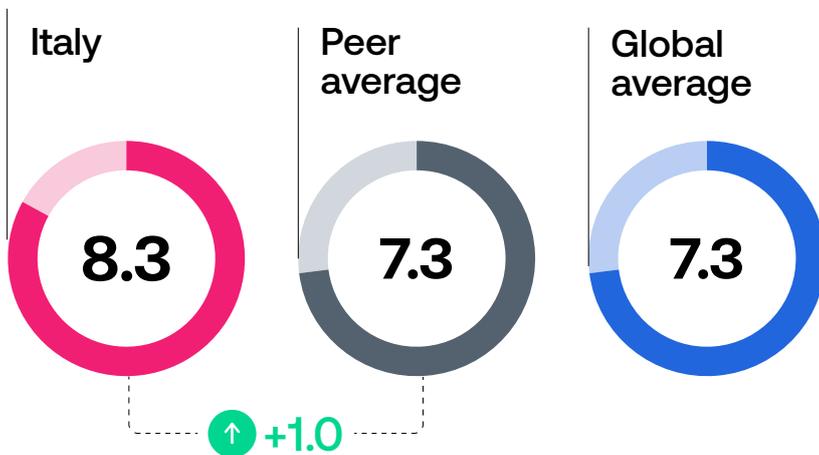
Retention is also strong, with 77.7% likely to remain, 3.2 points ahead of Portugal. Yet, at -14, eNPS sits 12 points below Portugal's -2.

Italian workers report deep satisfaction, appear to find meaning in their work, and plan to remain, but are markedly less likely to recommend their employer. Something breaks down between the felt experience and advocacy.
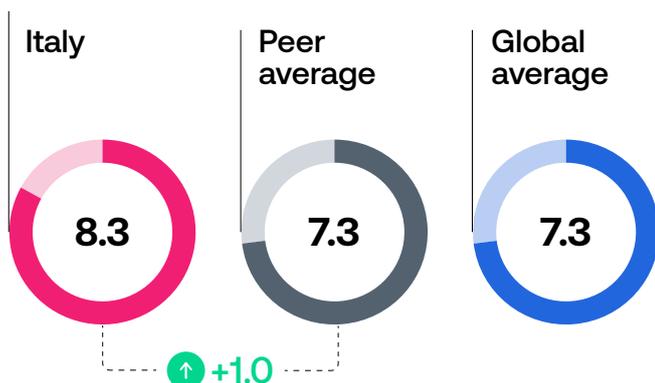
Peer group explanation: Italy, Portugal: Southern European Mediterranean peers with shared economic structure, strong SME sectors, comparable market rigidities, and cultural orientations to work-life integration.
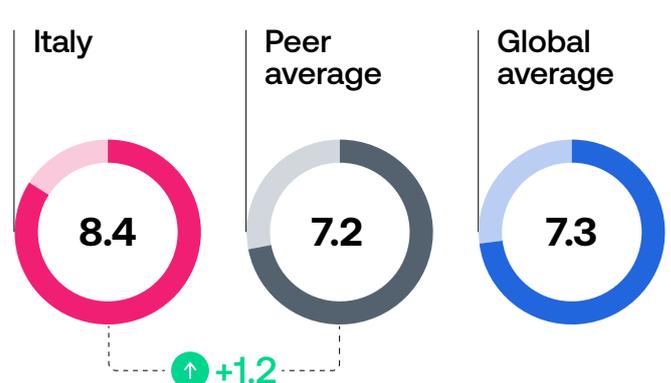
Overall
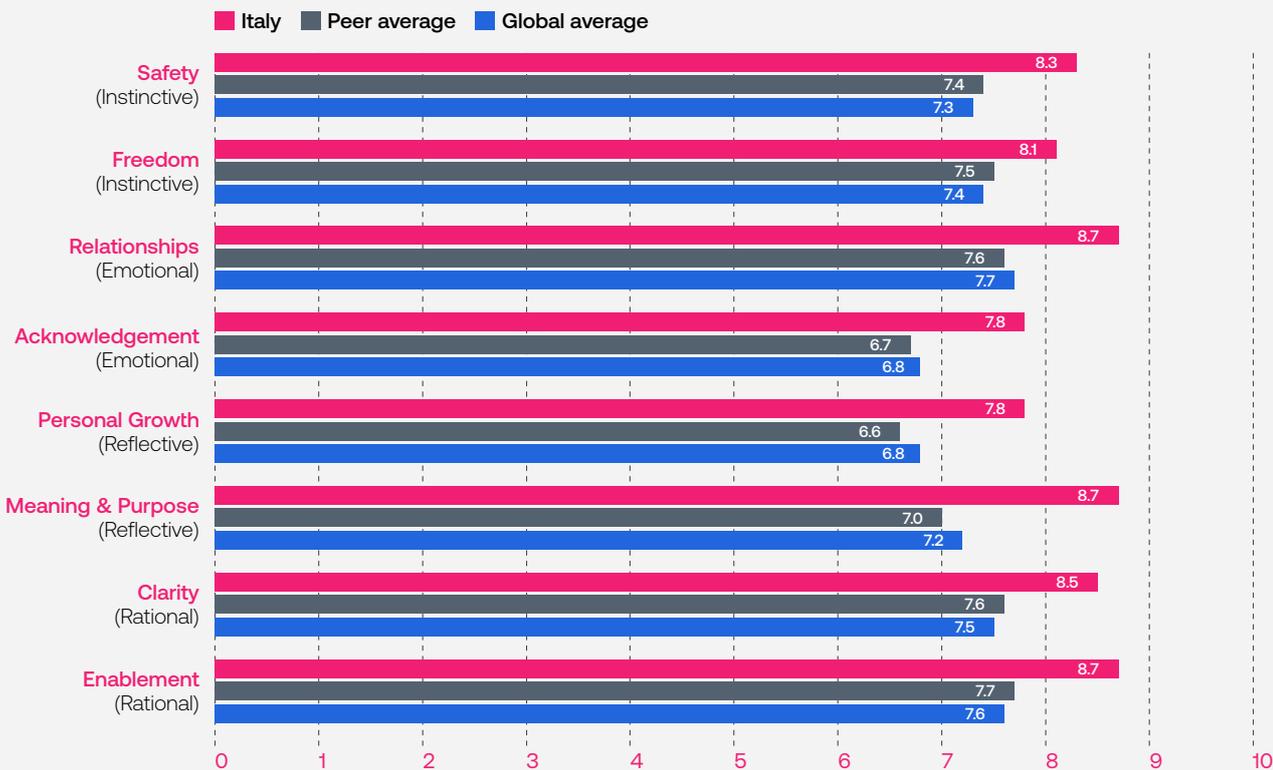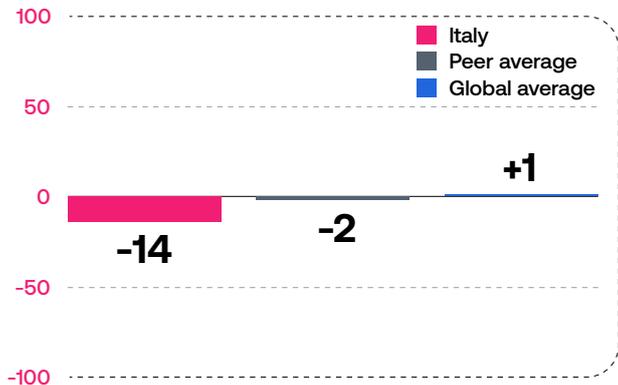
⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

Italy	Peer average	Global average
8.3	7.3	7.3

⬆ +1.0

Happiness

Italy	Peer average	Global average
8.3	7.3	7.3

⬆ +1.0

Engagement

Italy	Peer average	Global average
8.4	7.2	7.3

⬆ +1.2

Neuroscience themes

Legend: Italy | Peer average | Global average

Theme	Italy	Peer average	Global average
Safety (Instinctive)	8.3	7.4	7.3
Freedom (Instinctive)	8.1	7.5	7.4
Relationships (Emotional)	8.7	7.6	7.7
Acknowledgement (Emotional)	7.8	6.7	6.8
Personal Growth (Reflective)	7.8	6.6	6.8
Meaning & Purpose (Reflective)	8.7	7.0	7.2
Clarity (Rational)	8.5	7.6	7.5
Enablement (Rational)	8.7	7.7	7.6

eNPS

Legend: Italy | Peer average | Global average

Italy: –14
Peer average: –2
Global average: +1

Productivity

Italy: 8.3
Peer average: 7.7
Global average: 7.6

↑ +0.6

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Country snapshot
Luxembourg

Overview

Luxembourg trails its peer group across nearly every dimension, but only marginally, with most dimensions sitting 0.1 to 0.2 points behind.
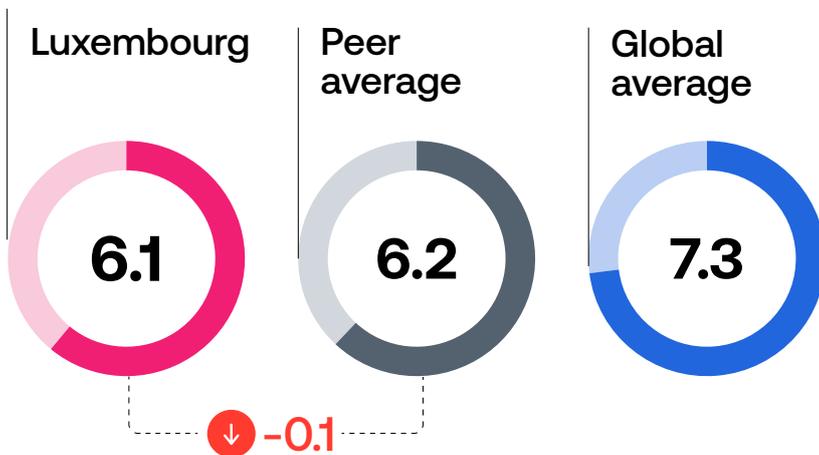
At -41, eNPS is 4 points below the peer average. Productivity (6.9) edges ahead of peers by +0.1.

The retention picture is the most acute in the dataset. Only 56.6% are likely to remain, which is 7.4 points below the peer average and the lowest figure of any country. A quarter of the workforce (25.3%) is actively planning to leave.
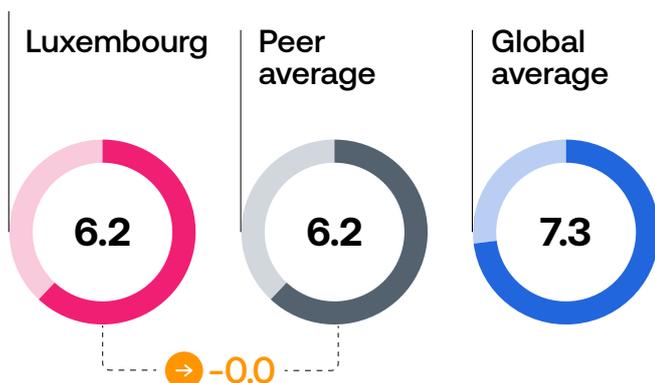
Peer group explanation: Luxembourg, Belgium, France: Luxembourg's workforce is actually drawn from these countries (cross-border commuters make up nearly half its labor force).
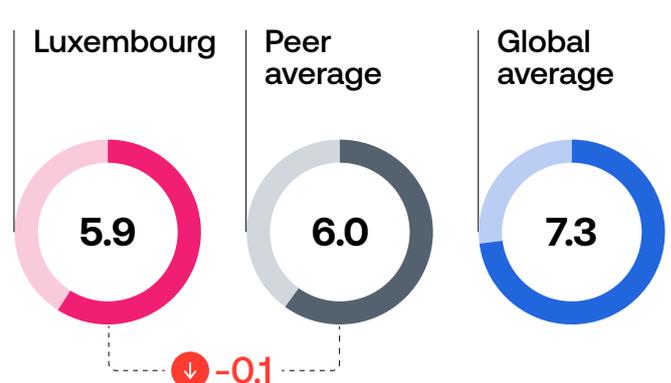
Overall

⬆ Above benchmark ➡ Equal to ⬇ Below benchmark

Luxembourg	Peer average	Global average
6.1	6.2	7.3

⬇ –0.1

Happiness

Luxembourg	Peer average	Global average
6.2	6.2	7.3

➡ –0.0

Engagement

Luxembourg	Peer average	Global average
5.9	6.0	7.3

⬇ –0.1

Neuroscience themes

Legend: Luxembourg ■ Peer average ■ Global average ■

Theme	Luxembourg	Peer average	Global average
Safety (Instinctive)	6.2	6.4	7.3
Freedom (Instinctive)	6.2	6.4	7.4
Relationships (Emotional)	6.8	6.7	7.7
Acknowledgement (Emotional)	5.4	5.5	6.8
Personal Growth (Reflective)	5.4	5.4	6.8
Meaning & Purpose (Reflective)	5.8	5.9	7.2
Clarity (Rational)	6.4	6.5	7.5
Enablement (Rational)	6.1	6.3	7.6

eNPS

Luxembourg: **-41**
Peer average: **-45**
Global average: **+1**

Productivity

Luxembourg	Peer average	Global average
6.9	6.8	7.6

↑ +0.1

Country snapshot
Mexico

Overview

Mexico sits level with its overall peer group average, but distinguishes itself on Personal Growth (+0.3), which is the largest positive gap in its profile.
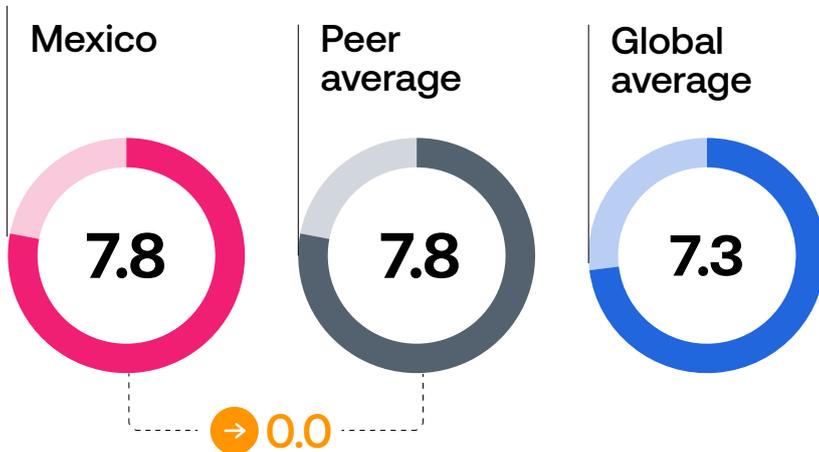
Safety and Freedom both edge ahead by 0.1, but Mexico trails marginally in Relationships (-0.2), Enablement (-0.1), and Productivity (-0.1). At 31, eNPS matches the peer average exactly.

The Personal Growth lead is worth noting precisely because it's the dimension that most consistently underperforms globally. At 7.7, Mexico pulls ahead its high-scoring regional peers in the one area where workforces worldwide feel most shortchanged.
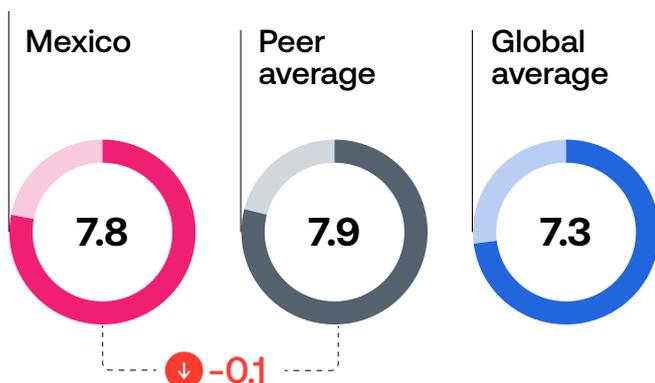
Peer group explanation: Mexico, Chile, Colombia, Brazil: The four largest Latin American formal-sector economies, sharing regional trade ties and comparable workforce modernization trajectories.
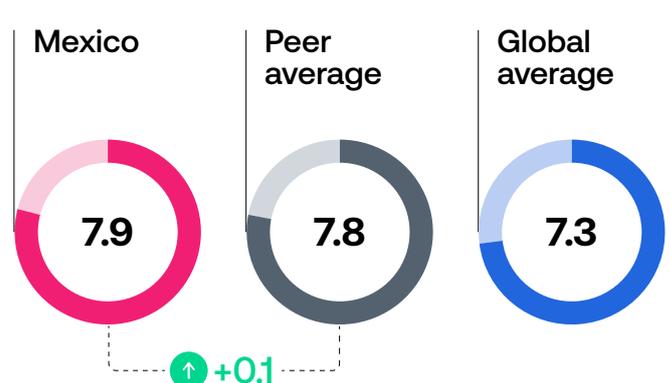
Overall

⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

Mexico	Peer average	Global average
7.8	7.8	7.3

➡ 0.0

Happiness

Mexico	Peer average	Global average
7.8	7.9	7.3

⬇ -0.1

Engagement

Mexico	Peer average	Global average
7.9	7.8	7.3

⬆ +0.1

Neuroscience themes

Mexico   Peer average   Global average

Theme	Mexico	Peer average	Global average
Safety (Instinctive)	7.9	7.8	7.3
Freedom (Instinctive)	8.0	7.9	7.4
Relationships (Emotional)	8.0	8.2	7.7
Acknowledgement (Emotional)	7.4	7.4	6.8
Personal Growth (Reflective)	7.7	7.4	6.8
Meaning & Purpose (Reflective)	7.9	7.7	7.2
Clarity (Rational)	7.9	7.9	7.5
Enablement (Rational)	8.1	8.2	7.6

eNPS

Mexico   Peer average   Global average

Mexico: +31
Peer average: +31
Global average: +1

Productivity

Mexico	Peer average	Global average
8.2	8.3	7.6

↓ −0.1

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Country snapshot
Philippines

Overview

The Philippines leads its peer group in many dimensions, with the biggest advantages in Acknowledgement (+0.4), Personal Growth (+0.3), and Meaning and Purpose (+0.3).
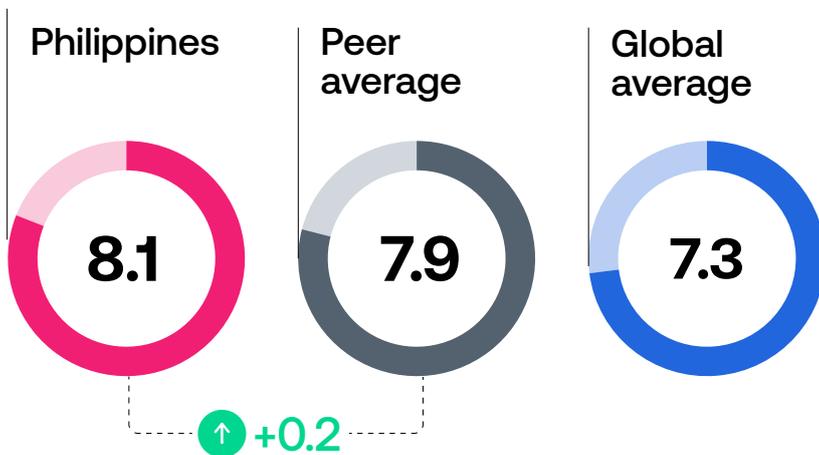
Retention is the strongest in the dataset, with 84.2% likely to remain and only 6.0% likely to leave. The profile is uniformly high with no weak spots relative to peers.

Acknowledgement (7.9) and Personal Growth (8.0) scores set the Philippines apart, as these are the two dimensions that consistently drag at the bottom of country profiles worldwide. This suggests a workforce that feels recognized and developed.
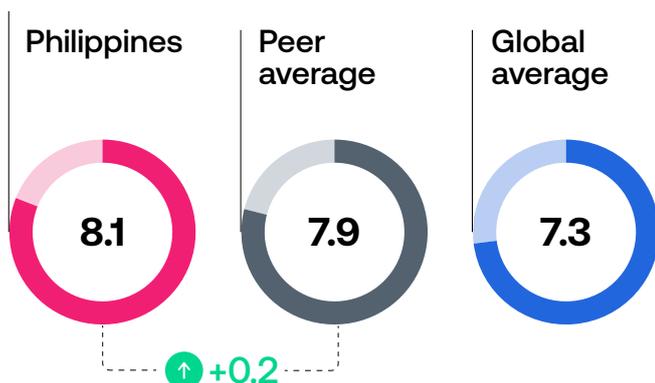
Peer group explanation: Philippines, Colombia, Mexico, Chile: Grouped by workforce structure rather than geography, all four are major BPO/outsourcing economies with large, service-sector workforces.

Overall

⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

Philippines	Peer average	Global average
8.1	7.9	7.3

⬆ +0.2

Happiness

Philippines	Peer average	Global average
8.1	7.9	7.3

⬆ +0.2

Engagement

Philippines	Peer average	Global average
8.2	7.9	7.3

⬆ +0.3

Neuroscience themes

Philippines **Peer average** **Global average**

Theme	Philippines	Peer average	Global average
Safety (Instinctive)	8.1	8.0	7.3
Freedom (Instinctive)	8.1	8.1	7.4
Relationships (Emotional)	8.3	8.1	7.7
Acknowledgement (Emotional)	7.9	7.5	6.8
Personal Growth (Reflective)	8.0	7.7	6.8
Meaning & Purpose (Reflective)	8.2	7.9	7.2
Clarity (Rational)	8.2	8.0	7.5
Enablement (Rational)	8.3	8.2	7.6

eNPS

Philippines **Peer average** **Global average**

+31   +33   +1

Productivity

Philippines	Peer average	Global average
8.4	8.3	7.6

↑ +0.1
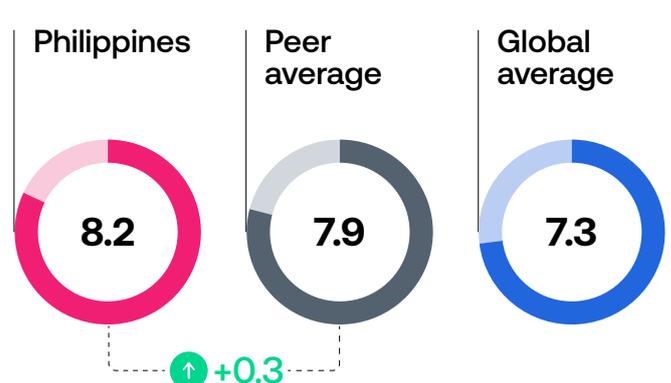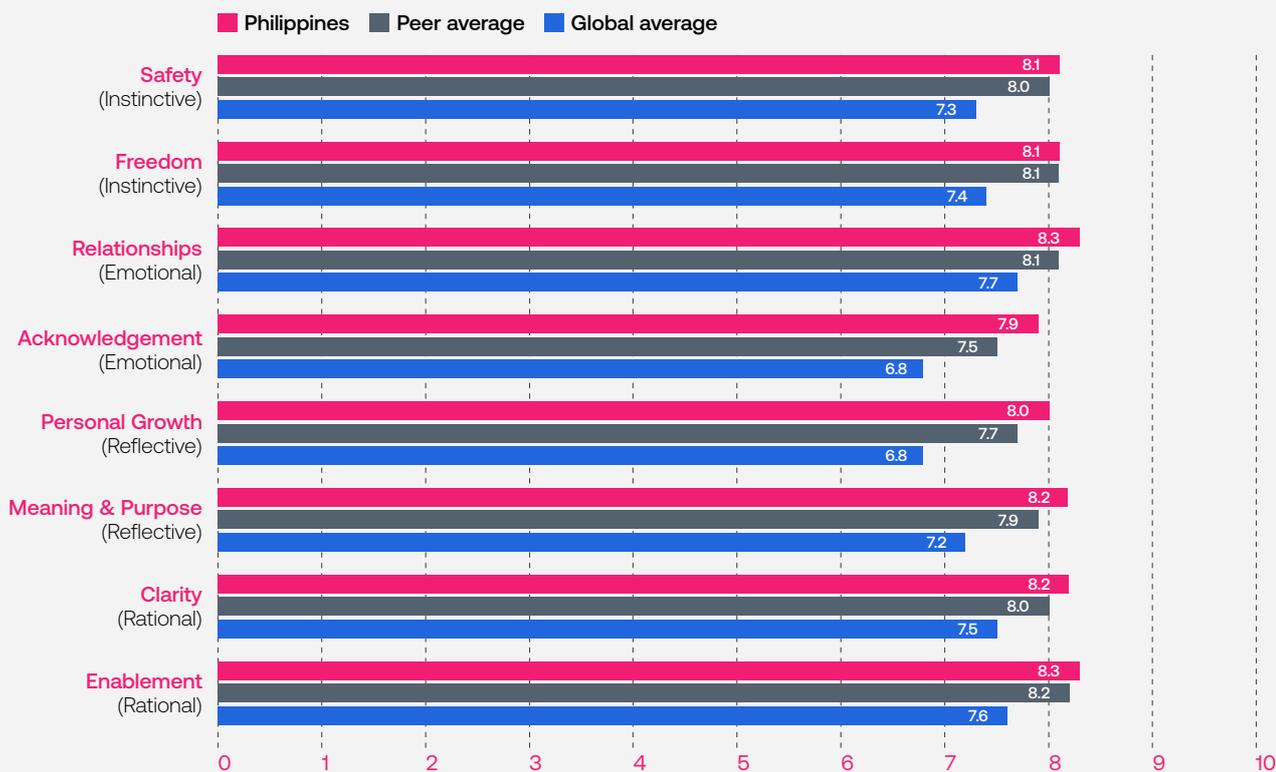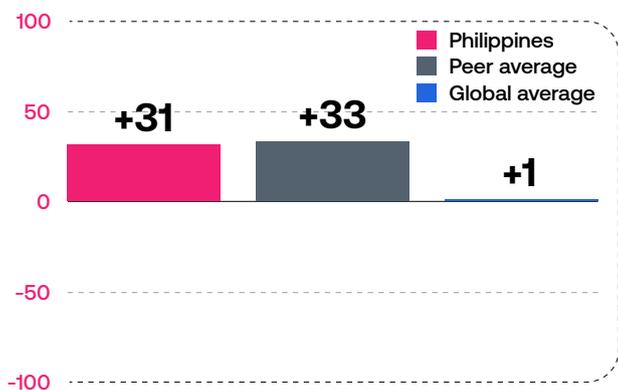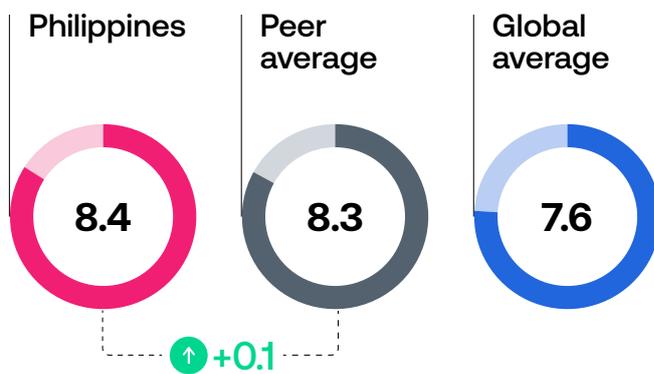
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Country snapshot
Portugal

GWHR

Overview

Portugal trails Italy by 0.6 to 1.7 points across every dimension, with the largest deficits in Meaning and Purpose (-1.7), Relationships (-1.1), and Personal Growth (-1.2).
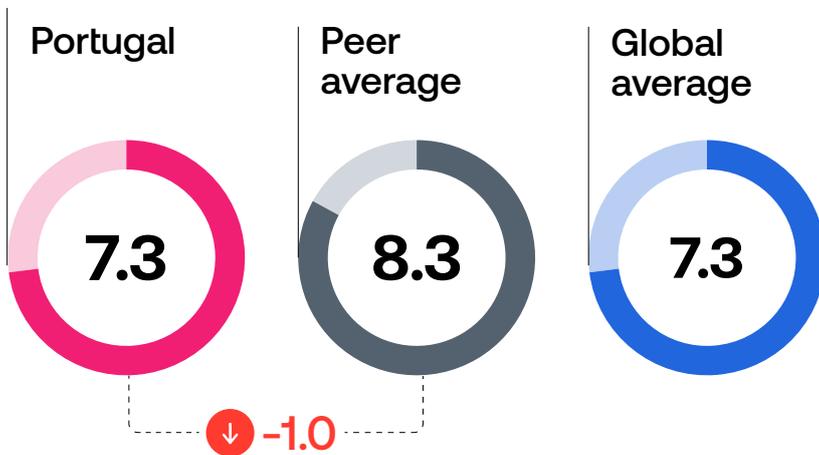
However, at -2, eNPS is actually 12 points ahead of Italy's -14, making it the one metric where Portugal clearly leads.

That eNPS reversal is the most interesting feature of this pairing. Combined with solid retention (74.5% likely to remain) and low flight risk (11.4% likely to leave), Portugal reads as a steady, if uninspired workforce.
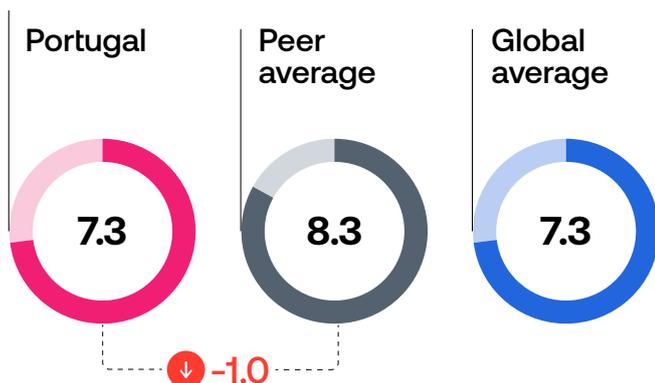
Peer group explanation: Portugal, Colombia, Mexico, Chile: Grouped by workforce structure rather than geography, all four are major BPO/outsourcing economies with large, service-sector workforces.

Overall

⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

Portugal	Peer average	Global average
7.3	8.3	7.3

⬇ -1.0

Happiness

Portugal	Peer average	Global average
7.3	8.3	7.3

⬇ -1.0

Engagement

Portugal	Peer average	Global average
7.2	8.4	7.3

⬇ -1.2

Neuroscience themes

Portugal · Peer average · Global average

Theme	Portugal	Peer average	Global average
Safety (Instinctive)	7.4	8.3	7.3
Freedom (Instinctive)	7.5	8.1	7.4
Relationships (Emotional)	7.6	8.7	7.7
Acknowledgement (Emotional)	6.7	7.8	6.8
Personal Growth (Reflective)	6.6	7.8	6.8
Meaning & Purpose (Reflective)	7.0	8.7	7.2
Clarity (Rational)	7.6	8.5	7.5
Enablement (Rational)	7.7	8.7	7.6

eNPS

Portugal · Peer average · Global average

Portugal: −2
Peer average: −14
Global average: +1

Productivity

Portugal	Peer average	Global average
7.7	8.3	7.6

↓ −0.6
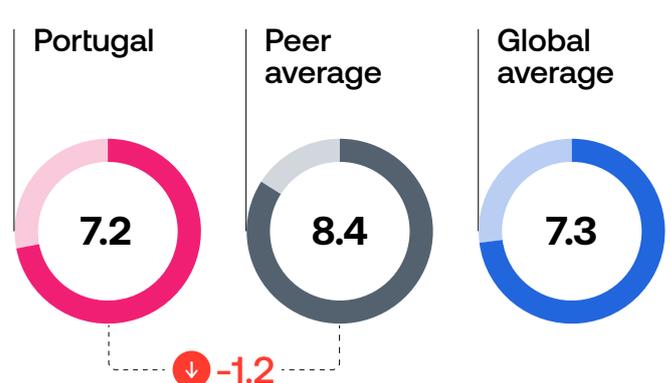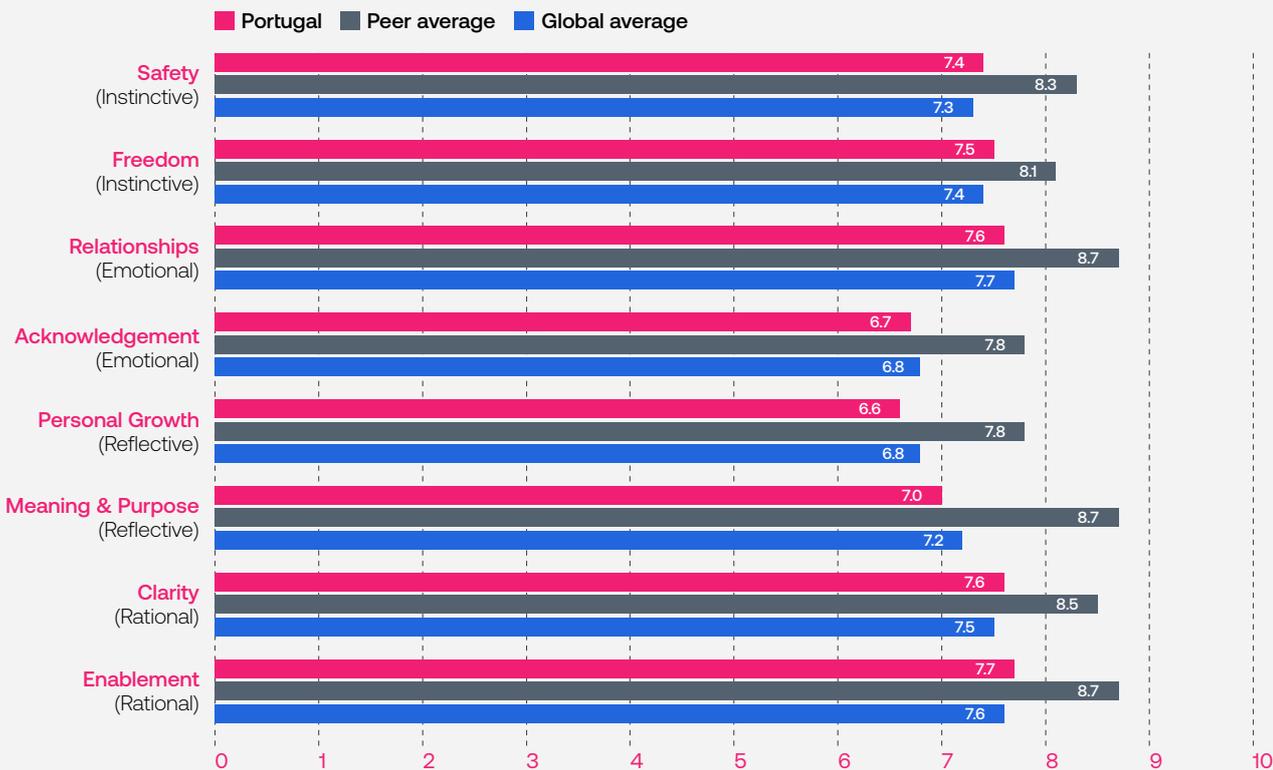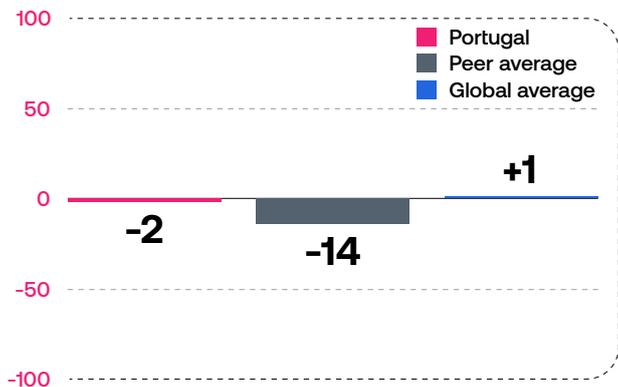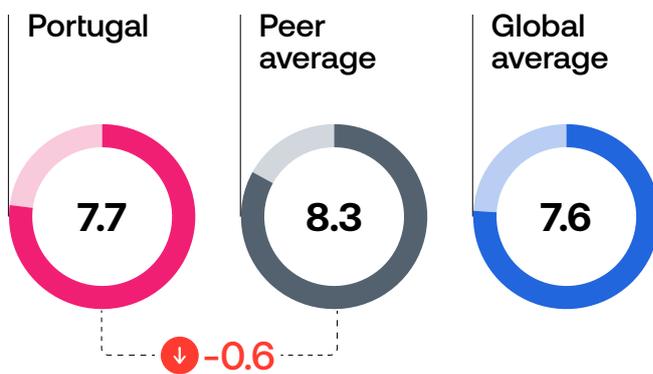
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Country snapshot
Romania

Overview

Romania leads its peer group across every dimension. At 1, eNPS is technically neutral but sits 20 points above the peer average of -19.
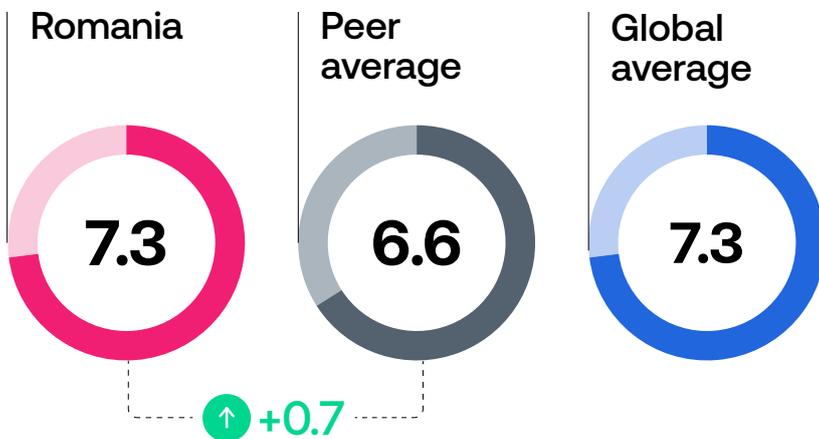
Retention is solid at 73.0% likely to remain, 9.3 points ahead of peers. This is comfortably the strongest profile in its regional cluster.

The standout finding is where Romania separates from its peers. Personal Growth (+1.0) and Meaning and Purpose (+1.0) are the two largest leads, and these are precisely the dimensions where Romania, Poland, and Turkey all struggle most.
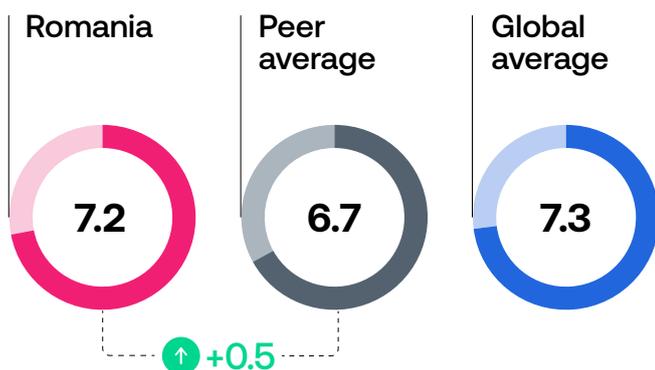
Peer group explanation: Romania, Romania, Turkey, Poland: Adjacent economies at similar stages of economic development, with comparable wage levels and post-industrial workforce transitions.

Overall

⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

Romania	Peer average	Global average
7.3	6.6	7.3

⬆ +0.7

Happiness

Romania	Peer average	Global average
7.2	6.7	7.3

⬆ +0.5

Engagement

Romania	Peer average	Global average
7.4	6.7	7.3

⬆ +0.7

Neuroscience themes

■ Romania   ■ Peer average   ■ Global average

Theme	Romania	Peer average	Global average
Safety (Instinctive)	7.2	6.5	7.3
Freedom (Instinctive)	7.2	6.8	7.4
Relationships (Emotional)	7.7	7.1	7.7
Acknowledgement (Emotional)	6.6	6.2	6.8
Personal Growth (Reflective)	6.8	5.8	6.8
Meaning & Purpose (Reflective)	7.3	6.3	7.2
Clarity (Rational)	7.7	7.3	7.5
Enablement (Rational)	7.9	7.3	7.6

eNPS

■ Romania   ■ Peer average   ■ Global average

Romania: +1
Peer average: –19
Global average: +1

Productivity

Romania	Peer average	Global average
7.9	7.0	7.6

↑ +0.9

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Global Workplace Happiness Report

Country snapshot
Turkey

GWHR

Overview

Turkey trails its peer group across all but one dimension, with its deepest deficits in Productivity (-1.1), Freedom (-1.0), and Safety (-0.8).
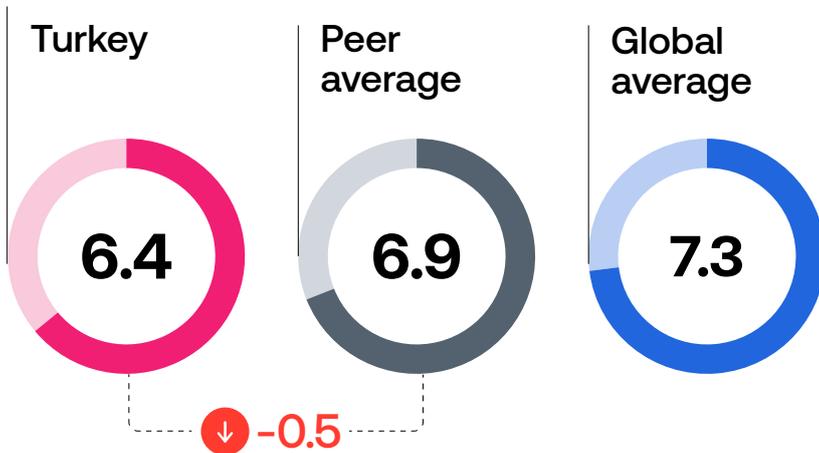
Acknowledgement (6.3) is the one dimension where Turkey matches peers exactly, though the peer average is itself comparatively low. At -18, eNPS sits 5 points below the group.

Retention is the weakest in the cluster, with 58.1% likely to remain, 10.5 points behind peers, and nearly a quarter of the workforce (24.3%) actively planning to leave. Safety and Freedom scores (both 6.1) are also the lowest in the peer group by a wide margin.

Peer group explanation: Turkey, Romania, Bulgaria, Poland: Grouped as economies straddling the EU's eastern frontier with similar per-capita income ranges, large young workforces, and labor markets.

Overall

⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

Turkey	Peer average	Global average
6.4	6.9	7.3

⬇ -0.5

Happiness

Turkey	Peer average	Global average
6.5	6.9	7.3

⬇ -0.4

Engagement

Turkey	Peer average	Global average
6.4	7.0	7.3

⬇ -0.6

Neuroscience themes

Turkey ■ Peer average ■ Global average

Theme	Turkey	Peer average	Global average
Safety (Instinctive)	6.1	6.9	7.3
Freedom (Instinctive)	6.1	7.1	7.4
Relationships (Emotional)	7.1	7.3	7.7
Acknowledgement (Emotional)	6.3	6.3	6.8
Personal Growth (Reflective)	5.6	6.2	6.8
Meaning & Purpose (Reflective)	6.3	6.6	7.2
Clarity (Rational)	7.0	7.5	7.5
Enablement (Rational)	6.9	7.6	7.6

eNPS

Turkey ■ Peer average ■ Global average

Turkey: −18
Peer average: −13
Global average: +1

Productivity

Turkey	Peer average	Global average
6.4	7.5	7.6

↓ −1.1

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Global Workplace Happiness Report

Country snapshot
United Kingdom (UK)

GWHR

Overview

The UK tracks closely with its peer group on most dimensions, but the profile splits in an interesting way.
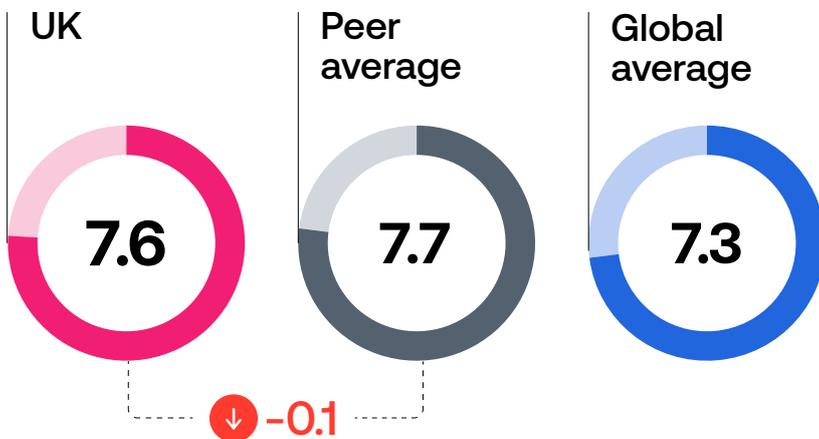
The UK edges ahead on Happiness (+0.1), Relationships (+0.1), Clarity (+0.2), and Productivity (+0.2), and posts a notably stronger eNPS (8 vs. 4). But it trails its peers slightly (at -0.1) in Engagement, Acknowledgement, Personal Growth, and Enablement.

The concern is retention. The UK's "likely to leave" figure of 21.5% is 12.7 percentage points higher than the peer group average of 8.8%, by far the largest single gap in the entire UK profile.

Peer group explanation: UK, USA, Germany: The three largest advanced Western economies with comparable corporate cultures, deep professional-services sectors, and globally benchmarked management practices.

Overall

⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

UK	Peer average	Global average
7.6	7.7	7.3

⬇ –0.1

Happiness

UK	Peer average	Global average
7.7	7.6	7.3

⬆ +0.1

Engagement

UK	Peer average	Global average
7.6	7.7	7.3

⬇ –0.1

Neuroscience themes

Legend: UK | Peer average | Global average

Theme	UK	Peer average	Global average
Safety (Instinctive)	7.4	7.4	7.3
Freedom (Instinctive)	7.7	7.8	7.4
Relationships (Emotional)	8.3	8.2	7.7
Acknowledgement (Emotional)	7.0	7.1	6.8
Personal Growth (Reflective)	7.2	7.3	6.8
Meaning & Purpose (Reflective)	7.7	7.8	7.2
Clarity (Rational)	7.9	7.7	7.5
Enablement (Rational)	7.8	7.9	7.6

eNPS

Legend: UK | Peer average | Global average

UK: +8
Peer average: +4
Global average: +1

Productivity

UK: 7.5
Peer average: 7.3
Global average: 7.6

↑ +0.2

Take part in the 2027
Global Workplace Happiness Report

Country snapshot
United States (US)

GWHR

Overview

The US trails its peer group by modest margins in most dimensions, with the largest gaps in Clarity (-0.5), Relationships (-0.4), and Personal Growth (-0.4).
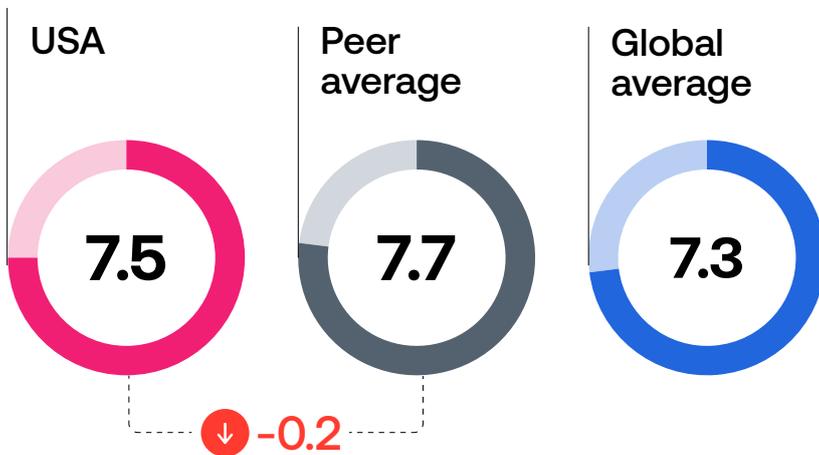
Productivity (7.6) is the one area where the US leads peers by a clear margin (+0.3). At 4, eNPS is positive but sits 4 points behind the peer average.

The retention shape is distinctive: only 8.8% are likely to leave (12.7 points below the UK), but 19.5% are passive, 3.5 points above peers. American workers aren't heading for the door, but nearly a fifth are uncommitted.

Peer group explanation: US, UK, Germany: The three dominant Western economies where multinational corporate culture, professional-services employment, and knowledge-worker expectations align.

Overall

⬆ Above benchmark   ➡ Equal to   ⬇ Below benchmark

USA	Peer average	Global average
7.5	7.7	7.3

⬇ –0.2

Happiness

USA	Peer average	Global average
7.5	7.8	7.3

⬇ –0.3

Engagement

USA	Peer average	Global average
7.5	7.7	7.3

⬇ –0.2

Neuroscience themes

Legend: USA | Peer average | Global average

Theme	USA	Peer average	Global average
Safety (Instinctive)	7.2	7.5	7.3
Freedom (Instinctive)	7.6	7.8	7.4
Relationships (Emotional)	8.0	8.4	7.7
Acknowledgement (Emotional)	7.0	7.1	6.8
Personal Growth (Reflective)	7.0	7.4	6.8
Meaning & Purpose (Reflective)	7.7	7.8	7.2
Clarity (Rational)	7.4	7.9	7.5
Enablement (Rational)	7.7	8.0	7.6

eNPS

Legend: USA | Peer average | Global average

- USA: +4
- Peer average: +8
- Global average: +1

Productivity

- USA: 7.6
- Peer average: 7.3
- Global average: 7.6

↑ +0.3

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Conclusion

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The Happiness Index: Converting culture into business performance

1. Benchmarking your organisation: *Not sure how your culture stacks up?*
Our global benchmark compares your organisation against tens of millions of cultural insights from organisations around the world. Discover your strengths and uncover key focus areas for cultural improvement.

2. Employee engagement platform: *Curious how your people think, feel, and behave?*
Our engagement platform gives a live view of your cultural health. Use research-backed surveys or create your own, then explore insights to see what really drives engagement at every stage of the employee journey.

3. Culture consultancy: *Unsure what's driving impact or where to focus?*
Our consultants turn insights into action. We help you build a culture that boosts performance — from revenue and profit to customer retention. Wherever you want to see results, we help you get there faster.

The Happiness Index

Actually Executing: How to Start moving from Good Intentions to Impact
Spotlight: Kate Thompson

Kate Thompson is Co-Founder of BusinessFourZero and Board Member of The World Wellbeing Movement, Action for Happiness, and The Forward Institute. She is Strategic Advisor to King's Trust, City of London Corporation, and Smartphone Free Childhood, and Visiting Lecturer at LSE and King's.

For decades, leaders have repeated the same stock phrase: our people are our greatest asset. A line so familiar it risks becoming background noise. And yet, perhaps this statement has never mattered more than it does now. We are entering an era defined by artificial intelligence and automation, where operational efficiency is increasingly table stakes. A world where the organisations that truly pull ahead will not be those that simply deploy AI fastest, but those that learn how to progress in partnership with it – carefully protecting and dialling up our uniquely human capacities for sense-making, influence, adaptability, creativity, and empathy.

Against this backdrop, competitive advantage is fundamentally shifting. The debate is no longer just about workforce productivity, but about workforce sustainability – the cumulative effect of wellbeing and engagement on long-term commitment and discretionary effort.

This is not a soft idea. Research led by Jan-Emmanuel De Neve and colleagues at Oxford's Wellbeing Research Centre found that an equal-weighted portfolio of US companies with the highest employee wellbeing outperformed the S&P 500 and Nasdaq Composite by almost 20% over five years.[65] In the field, the Human Capital Fund has consistently outperformed the S&P through good times and bad (see Chapter 5). The message is increasingly clear: how we experience work shows up in how businesses perform and how reliably that performance is sustained.

So why do many investors still undervalue the intangibles of workplace culture, despite the growing body of scientific and market evidence? And why do many senior leaders still fail to treat their workforce as a serious source of competitive advantage? With Harvard Business Review reporting that 79% of US executives agree employee unhappiness actively harms productivity, it's clear the C-suite understands the commercial stakes.[68] But when those same leaders were asked whether wellbeing is a strategic priority, only around 30% said yes, and fewer still – roughly 19% – reported having a defined strategy in place. The gap between belief and action is striking.

What explains this disconnect? As discussed throughout this report, one barrier is measurement. Despite real advances in behavioural science and people analytics, many leaders still struggle to see or trust a consistent set of metrics that link wellbeing to the top and bottom line. Another explanation is cultural. Away from the boardroom, workforce wellbeing feels compelling. But at the point where capital investment and resources are allocated, it still feels too intangible, too indirect, or too long-term to compete with initiatives aimed squarely at market share or EBITDA growth. But there is a more straightforward blocker at play here. Leaders aren't failing to understand the importance of workforce wellbeing, and there isn't a widespread lack of intent.

The reality is that it's simply much harder to execute than it sounds. So the real question becomes not whether workforce wellbeing matters, but how do we execute against it with the same discipline we apply to any other strategic priority? If we are serious about this agenda, what are the first practical steps leaders need to take?

1. A commercial story, not an HR one

This work goes wrong when wellbeing is framed as another people or HR initiative, rather than as a core driver of commercial performance. That means going well beyond the excellent but generic evidence that wellbeing improves attraction, productivity, and retention, and instead building a tailored business case that is unbreakably linked to the organisation's performance. One that draws a clear red thread from purpose and ambition through to strategic priorities and operational plans – quantifying how a sustainable workforce creates an outsized advantage in turning these plans into a reality.

Of course, in many businesses, this narrative runs headlong into the tension between short-term performance pressure and long-term value creation. Executing well requires us to understand the system we are operating in, educate investors and stakeholders, and learn how to frame long-term workforce investment in language the market can hear and respect.

For example, when quantifying how workforce experience influenced regulated care outcomes, a leading care home provider initially assumed the biggest gains in quality-of-care outcomes would be linked to frontline staff wellbeing. The data told a different story: the strongest association sat with the wellbeing of their location managers – particularly driven by their ability to access resources and manage workload. By uncovering this link between manager conditions and service outcomes, the organisation reframed workforce wellbeing as a core performance lever, redirecting long-term investment toward the targeted manager interventions needed to strengthen care quality from day one.

In shaping these commercial stories, it's easy to f orget how much words matter. It's not about dense PowerPoint decks. It's about a narrative that's clear enough to hold in crowded minds, and compelling enough to cut through corporate noise.

2. Emotional commitment, not just rational agreement

A strong commercial case is necessary, but never sufficient alone. Most change programmes fail not because leaders disagree with the logic, but because they never fully commit to the emotional work of change. To actually execute, we must invest the time and space needed for leaders and managers to get crystal clear on and genuinely committed to the wellbeing agenda. That means making room for debate, reflection, and shared sense-making: *why this matters now, what is at stake if we do nothing, and what will it take from each of us to properly shift the dial.*

For example, when embedding a bold cultural transformation, InterContinental Hotels Group set out to build deep connection not just superficial alignment. Leaders were taken through a carefully designed, human-centred journey which included a section on employee engagement insights. Strikingly, these were presented on a mirror backdrop, prompting leaders to recognise their own reflection and responsibility within the experience. By making ownership personal and visible, belief strengthened – helping lay the foundations for a three-year growth journey that marked their highest net-system size growth in a decade, whilst increasing almost every measure of cultural health.

When strengthening commitment, be wary of rose-tinting and one-way communication. Real buy-in only grows when teams have permission to surface doubts, tensions, and trade-offs – and to work honestly through what is exciting and what is uncomfortable.

3. Focused priorities, not sprawling programmes

With a clear commercial case and genuine ownership in place, the next risk is overreach. Too many wellbeing strategies collapse under their own weight, diluted by sprawling initiatives and competing priorities. The real question we need to answer is: *what are the leanest set of investments that will deliver the biggest impact?* Executing these ambitions requires discipline and attention to detail: clear priorities, a phased roadmap, and relentless simplification. The challenge here is to reduce plans to their purest form without losing strategic nuance.

Once armed with hyper-focused priorities, the key is to build early momentum. Progress feels real when people can see points on the board. Which shouldn't be left to chance. Create clear mechanisms for surfacing and celebrating early successes and learning fast from failures. Done well, this becomes a story engine that turns one-off wins into collective confidence.

4) Evidence-led action, not fashionable fixes

Equipped with a strong commercial story, deep emotional commitment and sharp priorities, the next exam question is: *which interventions will genuinely deliver what we need?* Here it is important to distinguish between direct and indirect interventions. Direct interventions are designed to improve personal wellbeing outside the flow of work itself – for example, gym memberships or mindfulness apps. In other words, the wellness industry. There is nothing inherently wrong with these. In fact, some are essential, such as ensuring workforces have access to high-quality, evidence-based mental health support.

However, research shows that indirect interventions – those that redesign how work actually works by addressing the underlying drivers of wellbeing such as job security and development, relationships, independence and flexibility, variety and fulfilment, and compensation[70] – tend to have far greater impact in work.[71] One of the most useful resources in this space is The Work Wellbeing Playbook, published by the World Wellbeing Movement and Oxford's Wellbeing Research Centre.[72] It is an up-to-date synthesis of the strongest evidence on workplace wellbeing interventions, translated into a practical menu that's ready to be put into practice. The team behind the Playbook have already done the heavy lifting – reviewing, summarising, and stress-testing the evidence – so professionals can focus on disciplined execution rather than chasing trends.

The reality is that many leaders – particularly those of you reading this report – already recognise that workforce wellbeing is a strategic lever for long-term performance. Ambition is not the issue. But the intention-implementation gap is real and closing it is not easy. Turning conviction into impact takes a credible commercial story, deep emotional commitment, disciplined focus, and evidence-led action. Workforce wellbeing will not advance on good intent alone. It will be won – or lost – in how seriously we choose to execute.

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As a workplace happiness community we need to help leaders in the future move from gut-based to evidence-based decision-making.

Jan-Emmanuel De Neve, 2026

Evidence-based decision-making is difficult even in a context where the data is familiar and relatively straightforward. It's more challenging when every data point is a person with unique attitudes, values, and feelings.

Couple that with the sheer wealth of advice, analysis, and benchmark data in this report, and it would be easy to get overwhelmed.

The antidote is *perspective*. To help provide this, and avoid overwhelm, we want to offer several ways for leaders to frame the findings as they consider their culture and strategies to shape it.

People experience work as a relationship. If there's one thing to take away from this report, this is it. The dimensions that predict happiness, advocacy, and retention are all about how we see ourselves in that relationship with the organization: Do I belong here? Does this organization inspire me? Are my contributions noticed? Do I see a future?

The important relationships in our lives amplify or diminish our energy, commitment, and overall wellbeing. Work is no exception. A successful relationship brings out our best selves, who find meaning in helping our organization succeed. When we stop feeling seen, the reverse is true; our contributions and commitment recede even if we remain for practical reasons.

For their part, employers typically approach employment as a transaction: they provide a role, resources, and compensation in exchange for the employee's output.

The standard architecture of management reflects this by focusing on job requirements, performance frameworks, comp structures, and org charts.

The tension between where organizations focus their resources and what people need to thrive is the central finding of this report.

Culture is never perfect nor finished. Every organization is on a journey, and it's not a straight line. Success is not a final destination but an ongoing commitment to understanding the strengths and weaknesses of the organization's culture, and then working to improve it. While measurement alone won't fix anything, it's the precondition for everything else.

There is no threshold you must cross before the work becomes valuable.

Averages are most useful as provocations. Demographic and industry benchmarks ask "how are we all doing?" The better questions are the ones you can only ask about your organization: "where is the experience failing our employees"; "where could it support their best selves?"

The various lenses throughout this report exist to help you ask the better questions. Your field-based workers are not having the same experience as your hybrid teams. Your mid-career employees are not on the same trajectory as your newest joiners. Without your organizational context, a broad average can obscure both the problem and the opportunity.

Anything big and undefined is daunting. And that's one of the reasons we talked about The Global Workplace Happiness Survey for years before launching it. Framing this edition as "year zero" helped us let go of the need for perfection and unblock the process. Writing the final word on workplace happiness was impossible, but establishing a first set of benchmarks was achievable.

Depending on where your organization is in its journey, it might be useful to think about your cultural transformation as being in "year zero" too.

Bring the challenge down to size, focus on something that matters to your business and your people, and get started.

The last competitive advantage

We believe that it has never been more important to understand workplace culture, because how we engage with it is, increasingly, a competitive question.

Technology is rapidly commoditizing operational efficiency. AI and automation are closing the distance between organizations on the dimensions where they typically focus, such as process, information flow, resource allocation, and productivity.

As this happens, one of the few durable sources of differentiation will be the quality of the human experience and the value it unlocks by driving creativity, resilience, and innovation.

The next five years may see the largest upheaval in business models and labor since the Industrial Revolution. No one can perfectly predict how it will affect their markets, their structures, or their people.

The organizations that inspire their employees, create a sense of belonging, and make them feel safe to take risks, won't simply be better places to work, they'll be far better at getting to the other side, whatever that looks like.

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Appendices

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The Happiness Index: Converting culture into business performance

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The Happiness Index

Appendix 1: Methodology of The Global Workplace Happiness Survey

The Global Workplace Happiness Survey is a study of employee happiness and engagement conducted by The Happiness Index. Unlike wellbeing surveys that focus primarily on rational outcomes (e.g. productivity, retention), this report utilizes a blended neuroscience-based methodology to measure the four distinct brain systems that drive human performance: the Instinctive and Emotional systems (Happiness) and the Rational and Reflective systems (Engagement).

The report aggregates data from The Happiness Index, a proprietary psychometric instrument, to provide benchmarks of how employees think, feel, and behave at work

Survey methodology

Fielding

Data collection ran between February 1, 2025, and January 31, 2026, garnering 81,907 total responses in responses across 115 countries. The breakdown of response by country is provided in the next section of this Appendix. The survey was deployed via digital employee-voice platforms via partner organizations, public distribution, and The Happiness Index's customer base.

Respondents were offered a choice of 12 languages, reflecting the primary languages of nearly 70% of the world's population. A list of the languages is included with the full questionnaire later in this section.

Survey data collection and validation

The data for the report was collected via The Happiness Index using a method that has been in use for over six years and tested in over 170 countries with over 5 million respondents.

The version of the assessment used for this report was last externally validated in April 2025 by:

- Dr. Jeremy Dawson, Professor of Health Management at the University of Sheffield
- Dr. Sarah Pass, Senior Lecturer at Nottingham Business School and an Advisory Board Member at Engage for Success
- Dr David Batman, MSc., MB, ChB, FFOM, physician and the Director of DCB Consulting

Survey composition

The Global Workplace Happiness Survey is a standardized questionnaire featuring 29 questions (reproduced later in this appendix).

- **Twenty-four questions** map to eight neuroscientific drivers, with three questions per driver. An explanation of this framework follows in **Appendix 2**.
- **Five questions** measure high-level outcomes, including overall happiness, eNPS, intent to remain, perception of team productivity, and fairness of compensation.

Scoring: Questions are answered on a Likert scale of 1–10, where 1 represents the lowest sentiment ("Very unsatisfied") and 10 represents the highest ("Very satisfied").

Qualitative data: The dataset includes unstructured text responses to "Please tell us why?" prompts in each section, encouraging respondents to contextualize their numerical scores.

Demographic/Firmographics: The dataset can be examined through a variety of filters:

- **Personal:** Gender, Age Range
- **Professional:** Seniority, Job Role, Tenure
- **Structural:** Industry, Company Size, Work Style (Field/Remote/Hybrid/Office)

Anonymity: The methodology strictly protects user privacy. Data was often aggregated using a **"Rule of 5,"** ensuring no data is displayed for groups smaller than five individuals to prevent identification.

Benchmark calculations

The Happiness Index is committed to ensuring that every voice is heard, meaning absolutely every survey response is included.

To calculate our aggregated scores fairly and accurately, we have organized responses into 24 groups based on geography:

- **Most responses** are grouped by qualifying country. A country must have over 250 responses to form its own group. Twenty-two countries meet this threshold.
- **1,499 responses** from known countries with fewer than 250 participants are consolidated into a "Rest of World" group.
- **A small minority of responses** are lacking country data and these responses are placed into an "Unknown" group.

To ensure no single country disproportionately influences the global results due to a higher response volume, we normalize the data by calculating an average of the group averages, granting equal weight to all 24 groups.

This normalization method is applied to all aggregated scores featured in the report.

Limitations and critical considerations

Sample and data collection

While the survey results offer a unique lens into workplace wellbeing, there are some limitations to the method of data collection that affect comparability. Unlike reports that use random population sampling, the vast majority of data for this report is obtained directly from client HR systems and active organizational surveys. Therefore, the dataset is not a random sample of the workforce. There is an inherent selection bias towards organizations with formal HR approaches to measuring worker engagement and wellbeing.

Certain groups will be underrepresented, such as the self-employed or those in sectors with limited HR infrastructure. Findings should not be assumed to generalize across all labor markets.

Additionally, responses may be shaped by contextual or social desirability effects linked to HR-related interactions, even where anonymity is emphasized.

Country comparisons

Direct comparisons between countries (e.g., "Mexico scores 8.5 vs. UK scores 7.2") may not be valid due to cultural response factors. **Different cultures have distinct baselines for how they use numerical scales:**

- **Acquiescence bias:** Some cultures may tend to rate higher to be polite or agreeable.
- **Critical bias:** Other cultures may rate more critically or conservatively.

This year's Global Workplace Happiness Survey was not designed to evaluate these cultural differences. Because we cannot easily gauge or normalize for these factors, the raw country data is useful primarily for internal benchmarking (comparing responses in Mexico against the Mexican average) rather than international ranking (claiming Mexico is "happier" than the UK). The exception is the peer group average, derived by comparing the average of surveyed countries that rise to both statistical minimums and provide the best regional and/or socio-economic context.

Peer group comparisons

- **Brazil.** **Mexico, Colombia, Chile:** Large Latin American economies with shared language-family ties, similar BPO/services sector growth and comparable workforce demographics.
- **Belgium.** **France, Luxembourg:** Immediate geographic neighbors sharing labor markets, regulatory frameworks (EU core) and to varying degrees, language.
- **Bulgaria.** **Romania, Turkey, Poland:** SE European/near-accession economies with similar GDP per capita, post-transition labor markets, and positions on the EU's economic periphery.

- **Chile.** Mexico, Brazil, Colombia: Latin American peers with the strongest formal-sector employment bases and increasingly professionalized service economies across the region.
- **China.** India: Asian mega-economies with huge workforces, rapid urbanization trajectories, and large knowledge-worker segments alongside dominant manufacturing/services sectors.
- **Colombia.** Mexico, Brazil, Chile: Shared Latin American context with comparable workforce structures; growing BPO sectors and similar middle-income trajectories.
- **France.** Luxembourg, Belgium: Western European neighbors with deeply integrated labor markets, shared EU regulatory environment and comparable workplace expectations.
- **India.** China: Paired as the two economies with similar workforce scale, rapid digital transformation, and the coexistence of informal and formal labor markets.
- **Italy.** Portugal: Southern European Mediterranean peers with shared economic structure. Strong SME sectors, comparable market rigidities, and cultural orientations to work-life integration.
- **Luxembourg.** Belgium, France: Luxembourg's workforce is largely drawn from these countries as cross-border commuters make up nearly half its labor force.
- **Mexico.** Chile, Colombia, Brazil: The four largest Latin American formal-sector economies, sharing regional trade ties and comparable workforce modernization trajectories.

- **Philippines.** Colombia, Mexico, Chile: Grouped by workforce structure rather than geography, all four are major BPO/outsourcing economies with large service-sector workforces.
- **Portugal.** Italy: Mediterranean Southern European pair with similar SME-heavy economies, comparable labor market characteristics, and shared EU institutional context.
- **Romania.** Bulgaria, Turkey, Poland: Adjacent economies at similar stages of economic development, with comparable wage levels, and post-industrial workforce transitions.
- **Turkey.** Romania, Bulgaria, Poland: Grouped as economies straddling the EU's eastern frontier with similar per-capita income ranges, large young workforces, and labor markets.
- **UK.** US, Germany: The three largest advanced Western economies with comparable corporate cultures, deep professional-services sectors, and globally benchmarked management practices.
- **United States.** UK, Germany: The three dominant Western economies where multinational corporate culture, professional-services employment, and knowledge-worker expectations align.

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Response by Country

Geographic location was available for 80,133 respondents. Countries with a minimum of 250 responses were included in top-level comparisons.

Those with over 500 are included in the Country Snapshots.

🇧🇷	Brazil	16,763
🇧🇪	Belgium	3,416
🇧🇬	Bulgaria	1,591
🇨🇱	Chile	5,393
🇨🇳	China	596
🇨🇴	Colombia	750
🇫🇷	France	841
🇩🇪	Germany	280
🇮🇳	India	2,693
🇮🇹	Italy	2,060
🇱🇺	Luxembourg	793
🇲🇽	Mexico	2,659

🇵🇦	Panama	283
🇵🇪	Peru	305
🇵🇭	Philippines	1,457
🇵🇱	Poland	419
🇵🇹	Portugal	6,368
🇷🇴	Romania	3,163
🇹🇷	Turkey	3,269
🇬🇧	UK	8,793
🇺🇸	US	507
🇺🇾	Uruguay	335
	Prefer not to say	310
	Subtotal	**64,543**

An additional 1,497 responses, representing 4% of the geo-tagged total, were received from 93 countries which fall below the measurement threshold.

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The Global Workplace Happiness Questionnaire

Demographic / Firmographic questions

Preferred language

- English
- Romanian
- Turkish
- Portuguese (Brazilian)
- Portuguese (European)
- French
- German
- Polish

- Italian
- Dutch
- Bulgarian
- Spanish
- Czech
- Chinese (Simplified)
- Hebrew

Country

Age

Gender

Tenure at company

Work style (remote, hybrid, office, field)

Seniority

Job role/function

Company size

Research questions (continued on next page)

	Question	Neuroscience themes	Anchor points
1	*How satisfied are you with the physical environment you work in?*	Safety	Very unsatisfied – Very satisfied
2	*How much do you trust your organisation?*	Safety	Never – Always
3	*How satisfied are you with the balance between your work and home life?*	Safety	Very unsatisfied – Very satisfied
4	*How free do you feel to be your true self at work?*	Freedom	Not at all – Entirely
5	*How satisfied are you with the level of freedom you have in your role?*	Freedom	Very unsatisfied – Very satisfied
6	*How much do you feel you belong at this organisation?*	Freedom	Not at all – Completely
7	*How satisfied are you with the relationship you have with your line manager?*	Relationships	Very unsatisfied – Very satisfied
8	*To what extent do your interactions with colleagues boost your own energy and motivation at work?*	Relationships	Not at all – Always
9	*How much do you enjoy working with your team?*	Relationships	Never – Always
10	*How much do you feel valued as an individual?*	Acknowledgement	Never – Always
11	*How much do you feel your opinions are listened to?*	Acknowledgement	Never – Always
12	*How often do you receive feedback on your work?*	Acknowledgement	Never – Always
13	*How satisfied are you with the amount of learning opportunities on offer?*	Personal Growth	Very unsatisfied – Very satisfied
14	*How satisfied are you with the opportunity to progress your career here?*	Personal Growth	Very unsatisfied – Very satisfied
15	*How satisfied are you with the amount of challenge in your role?*	Personal Growth	Very unsatisfied – Very satisfied
16	*How inspired are you by your organisation?*	Meaning and Purpose	Very uninspired – Very inspired

	Question	Neuroscience themes	Anchor points
17	*How committed are you to helping the organisation succeed?*	Meaning and Purpose	Not at all - 100% commited
18	*How aligned are the values of the organisation with your own personal values?*	Meaning and Purpose	Very unaligned - Very aligned
19	*How clear are you on the requirements of your job?*	Clarity	Very unclear - Very clear
20	*How well does your organisation keep you informed?*	Clarity	Not at all – Always
21	*How clear is the link between your role and the success of the organisation?*	Clarity	Very unclear - Very clear
22	*How able are you to manage your workload?*	Enablement	Not at all - Always
23	*To what extent do you have access to the resources you need to support you in your role?*	Enablement	Never - Always
24	*How effective do you feel collaboration is in your organisation?*	Enablement	Very ineffective - Very effective
25	*Overall, how happy are you at work and please tell us why?*	Output	Very unhappy - Very happy
26	*How likely are you to recommend working here to a friend or relative?*	Output	Very unlikely - Very likely
27	*How likely are you to be working here in 12 months time?*	Output	Very unlikely - Very likely
28	*How productive do you feel your immediate team is?*	Output	Very unproductive - Very productive
29	*How fairly rewarded are you for the work that you do (e.g. pay, benefits and incentives)?*	Output	Very unfairly - Very fairly

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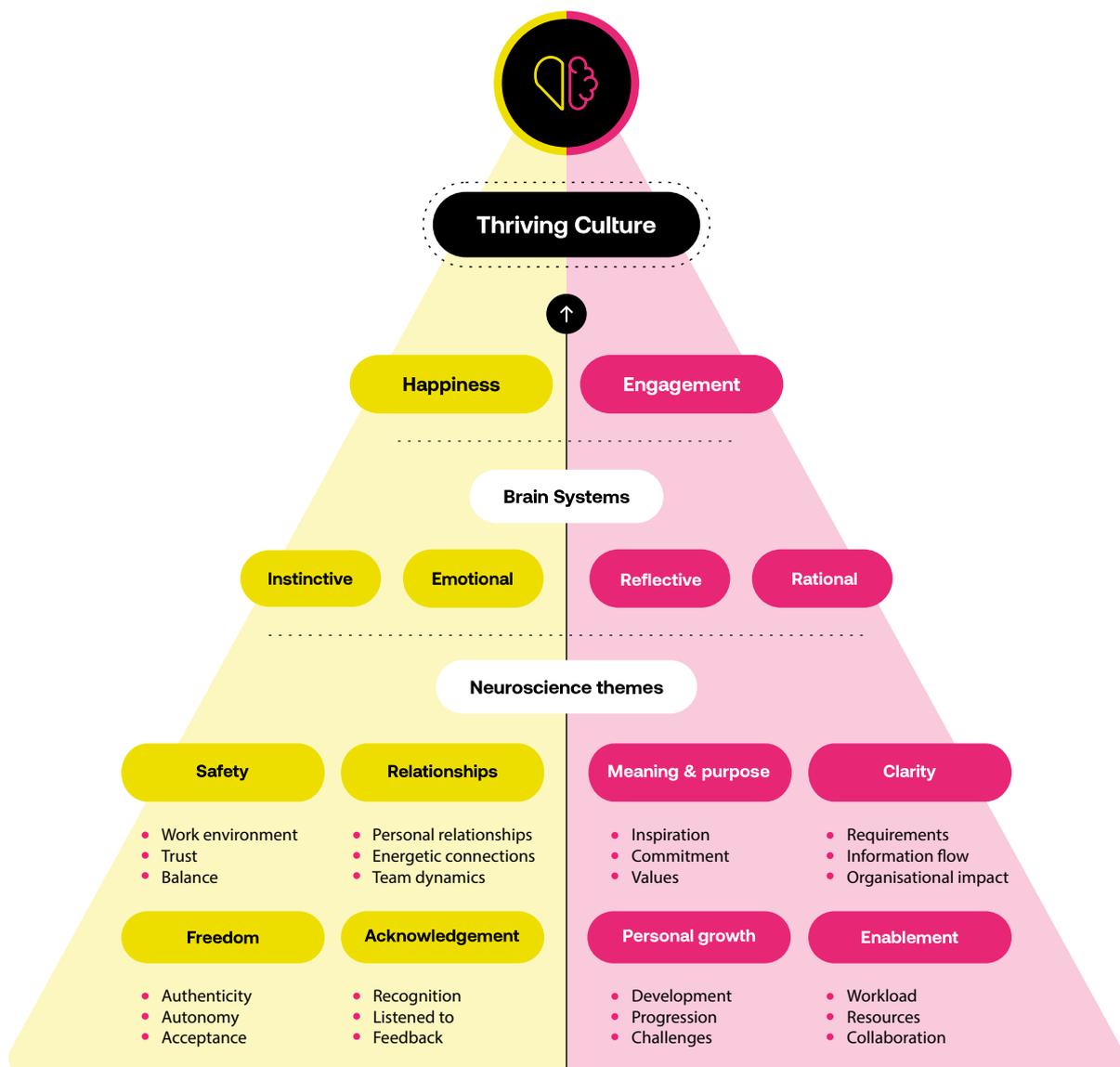# Appendix 2: Methodology of The Neuroscientific Framework

GWHR

Brain System Theory

Neuroscience is the study of the brain and the nervous system. Neuroscience understands that the brain and body are intricately connected; emotions affect our physical health, and our physical environment shapes how we feel. The Happiness Index explores this relationship in the workplace, looking at how emotional factors such as culture, safety, and meaning influence workplace wellbeing and performance.

The Happiness Index questionnaire is based on a model that organises human behavior around four key brain systems, each linked to fundamental workplace needs. Together, these systems explain the biological basis of motivation, collaboration, and engagement.

At its core, the methodology aims to give people the "freedom to be human." By aligning organisational systems with how the brain naturally functions, this approach helps workplaces become more empathetic, productive, and sustainable.

Thriving Culture

↑

Happiness   **Engagement**

Brain Systems

Instinctive   **Emotional**   **Reflective**   **Rational**

Neuroscience themes

Safety
- Work environment
- Trust
- Balance

Relationships
- Personal relationships
- Energetic connections
- Team dynamics

Meaning & purpose
- Inspiration
- Commitment
- Values

Clarity
- Requirements
- Information flow
- Organisational impact

Freedom
- Authenticity
- Autonomy
- Acceptance

Acknowledgement
- Recognition
- Listened to
- Feedback

Personal growth
- Development
- Progression
- Challenges

Enablement
- Workload
- Resources
- Collaboration

Happiness – How employees feel

- **Characteristics:** Fast, emotional, intuitive, and involuntary.
- **When these needs are met**, employees feel safe, valued, and connected.
- **Comprised of two systems**, the **Instinctive** and **Emotional.**

Instinctive system

The drivers of the Instinctive system are Safety and Freedom.

The instinctive system is concerned primarily with two needs, commonly referred to as "survive and thrive." Our genetic programming gives us the basic instructions we need to survive. We are constantly on the lookout for any threat which jeopardises this. This is essential to the longevity of the human species but has a downside in an organisational context. People in "survival mode" cannot give their best as the brain remains focused primarily on addressing ongoing threats.

The consequence is that it operates at a suboptimal level. To perform at our best we need to feel safe. This allows energy to be available for more constructive, collaborative, and creative activities. So, understanding people's sense of safety is paramount. If they do not feel safe, what is the source of that threat? The survey questions concentrate on the Physical Environment, Trust and Work-Life Balance.

But our instincts are not just concerned with survival. We also have a genetic need to thrive and to extend our boundaries of influence. The human species is innately curious and exploratory, and this sits at the heart of our evolutionary momentum. To give our best we need the Freedom to be ourselves and explore our environments. This is captured with questions around Authenticity, Autonomy, and Belonging.

Emotional system

The drivers of the Emotional system are Relationships and Acknowledgement.

The emotional system enables us to cooperate as social groups. Its primary role is to create bonding between us. Relationships therefore sit at the heart of our emotional needs.

In life, we are hugely impacted by those we care most about. In organisations, we have a deep-rooted need to experience fulfilling relationships with those we spend most time with. This includes those with our colleagues, our line managers, and the teams we want to feel part of. In parallel, the need for acknowledgement sits deep within us. In our early years, emotional cues and acknowledgement shape our direction and experience and this continues throughout life.

We need feedback from others to understand ourselves and to sustain our journey. This Acknowledgement is not just explicit, it includes the realm of subconsciously driven interactive behaviours which can challenge or endorse us, excite or depress us. Accordingly, questions focus on Recognition, Listening, and Feedback.

Engagement – How employees think

- **Characteristics:** Slow, reflective, deliberate, and logical.
- **When these needs are met**, employees are motivated, clear on their goals, and enabled to perform.
- **Comprised of two systems**, the **Rational** and **Reflective.**

Rational system

The drivers of the Rational system are Clarity and Enablement.

Human capacity for rational thought is far more advanced than any other living species, and this is reflected in the size and sophistication of the human cortex. Rational thought is concerned with interpretation and execution, ultimately, with getting things done. Its role is essentially practical. We have the capacity for action at a more basic instinctive level, but this is where we establish the rules of execution for the complex capabilities we learn through life.

We need to be clear about all sorts of relevant factors if we are to be able to take appropriate and effective action. The neural pathways we create in our brains are our rules of engagement.

To perform at our best we need clarity on matters like what is expected of us, what outcomes we are expected to achieve, what authority we have, who we are expected to engage with, what information we have access to, and so on. We therefore focus our questions on Requirements, Information Flow, and Organisational Impact.

We then need to have the means to get the job done. While Clarity focuses on the what, Enablement focuses on the how, hence the survey's questions on Workload, Resources, and Collaboration opportunities.

Reflective system

The drivers of the Reflective system are Personal Growth and Meaning & Purpose.

The prefrontal cortex is the region of the brain where we can bring together instinctive, emotional, and rational intelligence to create our sense of wholeness and self. Here we can be imaginative and think of the bigger picture. It is the world of our conscious aspirations, our hopes and dreams of self-fulfilment.

To tap into this potential, organisations need to be able to offer opportunities for personal growth and to provide meaning and purpose.

In terms of Personal Growth, people in organisations need to feel they are learning and developing. The work they do needs to stretch and energise them, and the organisation needs to offer opportunities for career development and progression.

Moreover, people want to feel inspired by their work. They seek Meaningful activity with a clear and fulfilling Purpose. Therefore, the survey focuses on Inspiration, Commitment, and Values.

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Add your data to the 2027 survey
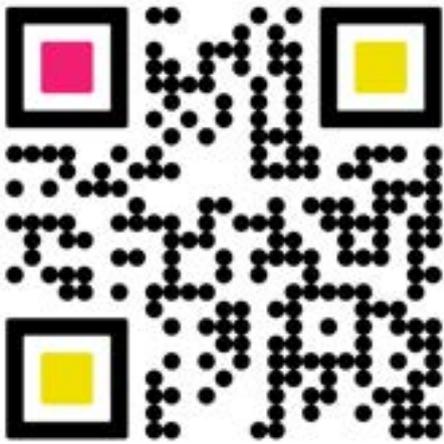
thehappinessindex.com

gwhr@thehappinessindex.com

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