Edenred

The Global Workplace Joy Index

Global insights from **26,000 employees and HR leaders** revealing how **workplace joy** fuels business performance

2026

Foreword

Workplace joy can sound like an intangible idea, a feeling, a mood, hard to pin down and even harder to act on. This report shows it is none of those things. Joy at work is measurable, it varies enormously by market, and it is closely and consistently linked to three things every business leader cares about: retention, productivity and advocacy.

At Edenred, we set out to understand something that gets talked about far less rigorously than engagement: whether joy is real enough, and consistent enough, to be treated as a genuine driver of business performance, rather than a cultural add-on. What we found is that it is. Workplace joy shapes how people feel about their work, how long they stay, and how they speak about the organizations they work for, and it does so in ways that show up directly in the numbers that matter to any HR leader's scorecard.

The Global Workplace Joy Index draws on the views of 17,450 employees and 8,920 HR leaders across 27 markets with regions grouped using the cultural clusters established by the GLOBE project, one of the most widely cited academic frameworks for understanding how culture shapes leadership and organizational life. By going beyond the traditional geographic focus on sales territories, we were able to uncover how workplace joy is experienced by thousands of workers, and crucially, how it can also be misunderstood.

Behind the Global Workplace Joy Index average (63 out of 100) sits a world of contrasts. Workers in fast-growing markets like India, Mexico and Peru report some of the highest joy scores anywhere in our study. By contrast, many workers in more established economies report levels of joy below the global baseline. These differences are not simply about prosperity or working conditions. They speak to culture, to expectations, and to how differently joy is built and sustained from one market to the next.

Perhaps more notable is what we found when we compared what HR leaders believe about their people to what those people report. Across almost every measure in this study, from everyday feelings of joy to engagement, to the quality of feedback conversations, HR leaders often see a more positive picture than the one their employees are living. This is not, in our view, a failure of care, but reflects how difficult it has become to keep a genuine finger on the pulse of a workforce that is more distributed, more generationally diverse, and under more competing pressures than ever before.

What gives us confidence is the evidence that this gap is closeable, and that closing it pays for itself. Workers with higher joy scores are dramatically more likely to stay with their employer, to feel productive, and to recommend their organization to others. And the levers that build that joy – meaningful recognition, thoughtfully chosen benefits, and genuine connection with colleagues and leaders – are well within reach of any organization willing to invest in them deliberately.

We hope this report gives you the clarity and the evidence to make that case within your own organization, and the confidence to treat joy not as a cultural nice-to-have, but as one of the most reliable drivers of business performance available today.

Jacques Adoue
EVP of HR, Edenred

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How we measure joy

The Global Workplace Joy Index turns workers' everyday experience into a single score from 0 to 100, built from ten measures covering how people feel at work day-to-day. These include their sense of energy, pride, purpose, connection and appreciation, as well as burnout, frustration, overall engagement and likelihood to recommend their employer.

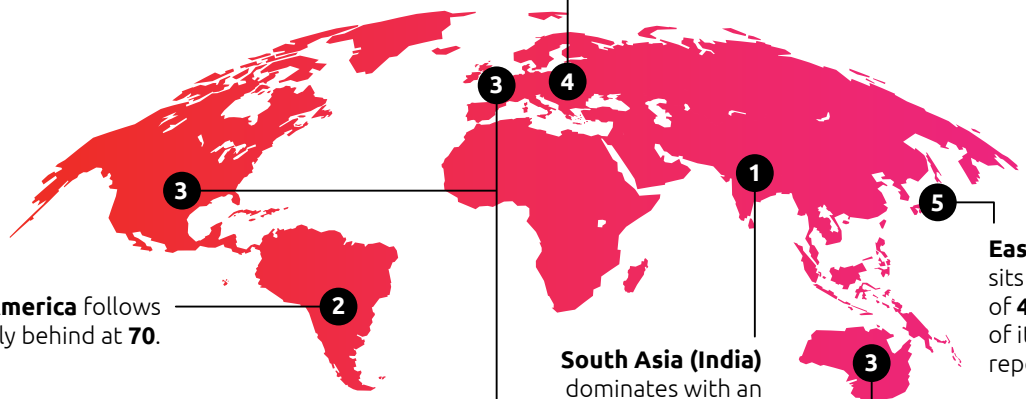
Each worker's answers are averaged into a single score, then grouped into **Low Joy** (0–49), **Medium Joy** (50–74) and **High Joy** (75–100), making it possible to compare people, benefits and countries on equal terms and to track how joy shifts over time. More detail can be found in the methodology.

The headline findings

Joy is geographically divided

The global average **63** Joy Index score

Workplace joy is highly regionalized, with South Asia (India) and Latin America leading the world



Central & Eastern Europe (60) are a few points behind.

East Asia (Japan) sits at a global low of **47** with 54% of its workers reporting low joy.

Latin America follows closely behind at **70**.

South Asia (India) dominates with an index score of **73**.

Anglo Cultures (63), Nordic & Germanic Europe (62) and **Southern Europe (62)** sit right around the global baseline.

Joy has a business ROI

Employee joy directly impacts balance sheets through retention and productivity gains

94%

of High Joy workers expect to stay with their employer for the next 12 months, compared to **63%** of Low Joy workers – a 31-point retention swing.

73%

of High Joy workers feel more productive than a year ago, compared to **27%** of Low Joy workers – a 46-point productivity uplift.

Benefits lay the foundations for workplace joy

Good benefits packages serve as the primary structural lever for enabling workplace joy

From the list of 20 potential benefits, High Joy workers receive an average of **5** whereas Low Joy workers receive an average of **3**.

Each benefit correlates with a Joy Index score above the global average of **63**, ranging from **64** to **71**.

Workers say benefits **(29%)** and growth opportunities **(28%)** are the main ways their organization enables joy.

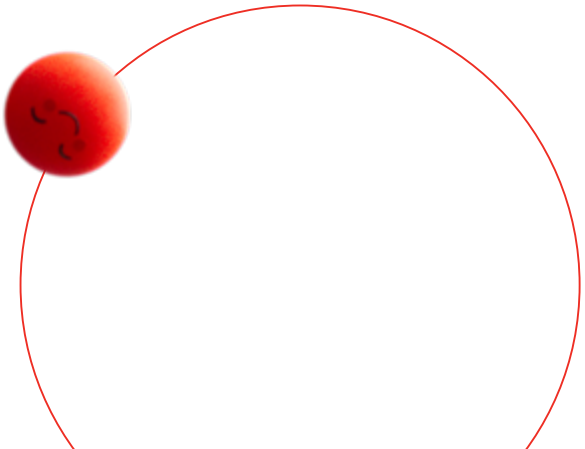
HR leaders recognize the value of benefits, with **38%** already leveraging them to increase workplace joy, higher than any other initiative.

Recognition has power

Small changes in feedback frequency catalyze major shifts in retention and productivity

Only 18% of workers receive formal or informal recognition from their manager at least three times a month.

Simply moving from 0 to 1 instance of recognition per month drives a substantial increase in the proportion of employees likely to stay with their employer for the next 12 months (from 73% to 86%) and **boosts worker productivity by an average of +23 percentage points globally.**

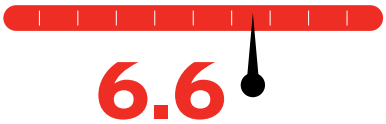


HR leaders might be too optimistic ... or too insulated

HR leaders consistently overestimate employee joy, with individualistic cultures showing wider disconnects



7.6
out of 10
The average global joy estimate of HR leaders



6.6
out of 10
The average global joy rating of workers

The perception gap in employee joy is widest in **Anglo Cultures (+1.33) and Central & Eastern Europe (+1.24).**

Southern Europe (+1.05) and **East Asia (Japan) (+1.0)** have joy perception gaps close to the global baseline **(+1.0)**.

HR leaders are most aligned with their workforces in **South Asia (India) (+0.80)** and **Latin America (+0.83)**, where actual joy scores also happen to be highest.

HR leaders also overestimate employee engagement and commitment with Anglo Cultures and Nordic & Germanic Europe the most detached from worker opinion



66% of HR leaders
believe employees are more engaged compared to a year ago



37% of workers
say they are more engaged compared to a year ago

Engagement bias is most severe in **Anglo Cultures (+36.6pp)** and **Nordic & Germanic Europe (+32.1pp).**

Southern Europe's (+29.6pp) and **East Asia's (Japan) (+30.0pp)** engagement perception is close to the global baseline **(+29pp).**

HR leaders are most aligned with their workforces in **South Asia (India) (+22.0pp)** and **Latin America (+24.2pp)**, with the narrowest engagement gap in **Central & Eastern Europe (+19.2pp).**



Benefits matter most at the top and the start of a career

The importance of benefits rises with seniority, and matters early in careers too

75% of senior executives rate benefits as important as, or more important than, base salary, compared to 60% of mid-level employees.

1 in 5 Gen Z workers say **benefits are among the things that contribute most to their joy at work.**

What keeps people in is different to what pushes them out

Salary and compensation sit at different ends of both

The top reasons workers expect to stay are **enjoying the work, feeling secure in their job, liking the people they work with, and having good work-life balance.** Pay only just makes the top five.

Flip the question around and pay jumps straight to the top reason to leave. **Retention is won on culture, security and relationships, but lost on pay and recognition.**

Low Joy workers are significantly more likely to cite almost every negative driver of attrition.

The global workplace joy index

The anatomy of workplace joy

Workplace joy is built from a chain of small factors which add up to a profile of everyday sentiment. From how much joy workers derive from their work to their energy, enthusiasm and engagement, joy in the workplace reflects a plethora of small everyday experiences that impact workplace wellbeing and culture.

It can help to think of joy as a product of these interlocking variables. Some workers may have strong connections with their colleagues but feel undervalued and underappreciated by management. Some may derive a strong sense of purpose and meaning but feel burnt out and exhausted. Some might even recommend their company as a great place to work but feel the need to move on and be challenged elsewhere. We created the Global Workplace Joy Index to understand what drives joy and where it breaks down to help HR leaders build and sustain joy anywhere in the world.

Joy Index scores are significantly higher in fast-developing and high-growth markets

Far from being an indication of baseline prosperity or absolute working conditions, established economies are more likely to have below-average scores.

The Joy Index, by region

Ranked by highest joy index score

South Asia (India)	73
Latin America	70
Anglo Cultures	63
Nordic & Germanic Europe	62
Southern Europe	62
Central & Eastern Europe	60
East Asia (Japan)	47

South Asia (India), with its Joy Index of 73, and **Latin America (Argentina, Mexico, Peru, Chile, Uruguay and Brazil)**, with a score of 70, stand out as the world's joy frontrunners.

Anglo Cultures (UK, USA, Australia) sit at the global baseline, pulled up by an above-average score of 68 in the USA.

Southern Europe (France, Italy, Portugal, Spain, Greece, Türkiye) and **Nordic & Germanic Europe (Austria, Belgium, Finland, Germany, Sweden)** index just below average, with the former affected by low-scoring Portugal at 56, and the latter by Austria at 60.

Central & Eastern Europe (Bulgaria, Czechia, Poland, Romania, Slovakia) have lower overall scores, pulled down by lower-scoring markets like Slovakia and Czechia (57).



The Global Workplace Joy Index

India	73
Mexico	72
Peru	72
Brazil	70
Chile	69
USA	68
Argentina	66
Uruguay	65
Türkiye	65
Romania	64
Sweden	64
France	64
Spain	63
Germany	62
Belgium	62
Finland	62
UK	62
Austria	60
Poland	60
Australia	60
Italy	59
Greece	58
Bulgaria	58
Slovakia	57
Czechia	57
Portugal	56
Japan	47

Joy frontrunners (70+)

Joy strongholds (60-69)

Joy potential (<60)

The global average **63** Joy Index score

Ranked by highest joy index score

Cultural response styles and economic context may also play a role in these patterns

Rising wages and a sense of upward mobility could lift optimism and self-reported joy in high-growth markets such as Peru, Mexico and India. India's average salary increases are projected at 9.1% for 2026 against inflation of around 4–4.5%, translating to real wage growth near 4.5–4.9%, while across Latin America, minimum-wage hikes are running ahead of inflation, restoring household purchasing power and helping lift consumer confidence across the region.



Workers in mature and prosperous markets such as Australia, Germany and the UK may be benchmarking against a higher baseline of expectation, but they're also navigating a genuinely tougher economic backdrop. Real wage growth across advanced economies slowed to around 1.8–2.2% in late 2025 and early 2026 – roughly half the pace seen a year earlier – and real pay still hasn't recovered to pre-2022 levels. The European Central Bank expects real wage growth to turn negative in the second half of 2026 as inflation, driven partly by higher energy prices, outpaces pay rises. Persistent cost-of-living pressure, even amid headline disinflation, may be dampening day-to-day sentiment in these markets in ways a single joy score can't fully separate from culture or expectation alone.

Some markets demonstrate a unique combination of worker challenges and cultural nuance against the backdrop of a Western framework. Japanese workers have a longstanding cultural tendency to avoid extremely positive survey responses due to humility and social caution but do face a work culture still shaped by long hours and stricter hierarchy than elsewhere in the study.[1]

At its core, workplace joy is a hyper-local experience

Regional clustering is a useful lens for spotting directional trends, but there are some significant variations within these clusters.

> **Southern Europe** spans a 9-point range between **Türkiye (65)** and **Portugal (56).**

> **Central & Eastern Europe** likewise ranges from **Romania (64)** to **Slovakia (57).**

Labor market conditions, generational composition of the workforce, and recent economic history clearly have some bearing on local contexts and worker sentiment.

[1]https://www.gallup.com/workplace/349484/state-of-the-global-workplace.aspx

Post-Covid, employees are seeking higher levels of trust, psychological safety and flexibility to manage their personal priorities alongside organizational priorities. The underlying insecurity created during that period has fundamentally changed what people value at work.

Indrajeet Sengupta
Former CHRO, M&M, Coca-Cola & J&J (India)

The global workplace joy gap

The anatomy of employer/employee disconnect

Workplace joy is really a sum of many smaller everyday realities, including energy, pride, connection and appreciation. It isn't one single feeling. So, it makes sense that the gap between how workers feel and what HR leaders believe isn't one single disconnect. It shows up separately, and to different degrees, across joy, advocacy, engagement, feedback quality and even how often sentiment gets measured in the first place.

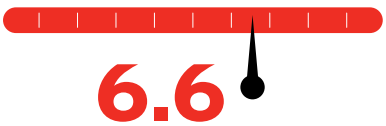
There's often a natural gap between how joyful HR leaders believe their people feel day-to-day, and how employees themselves experience it. Joy can be hard to see from the outside, even for the most attentive leaders.

Average HR leader rating:



7.6
out of 10

Average worker rating:



6.6
out of 10

Disconnect: A persistent +1.0 perception gap between the joy workers feel and the joy HR leaders estimate, shows up consistently enough to suggest that this isn't a one-off visibility gap. It suggests that leaders cannot always see the full or accurate picture of daily employee sentiment, especially without the right tools, signals or support to surface it.

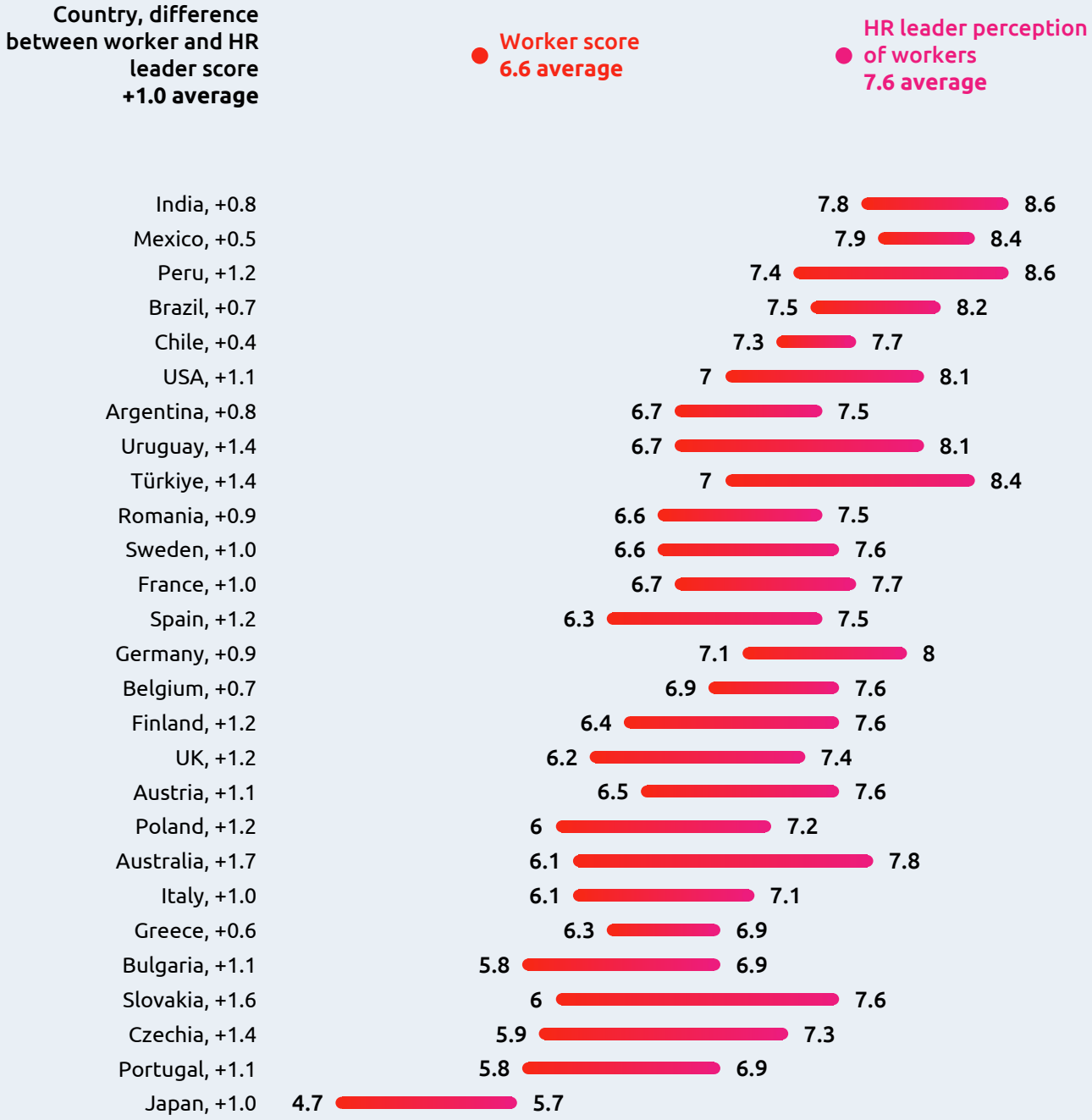
Employees feeling joyful when working, by region

Workers vs HR leaders; average perception gap on a 0–10 scale

South Asia (India)	0.80
Latin America	0.83
Nordic & Germanic Europe	0.98
East Asia (Japan)	1.00
Southern Europe	1.05
Central & Eastern Europe	1.24
Anglo Cultures	1.33

Employees feeling joyful when working, by market

Workers vs HR leaders; average perception gap, ranked by highest overall Joy Index score, 0–10 scale



Countries with the smallest perception gaps had an average Joy Index score of 66.2, 3.2 points above the global average. By contrast, countries with the largest gaps averaged 60.8, 2.2 points below average. Whether a happier workforce is simply easier to read accurately, or whether HR leaders in these markets have a stronger grasp of what drives employee joy and are prioritizing accordingly, the pattern is a useful signal. Closing the visibility gap and lifting overall joy may be part of the same underlying effort.

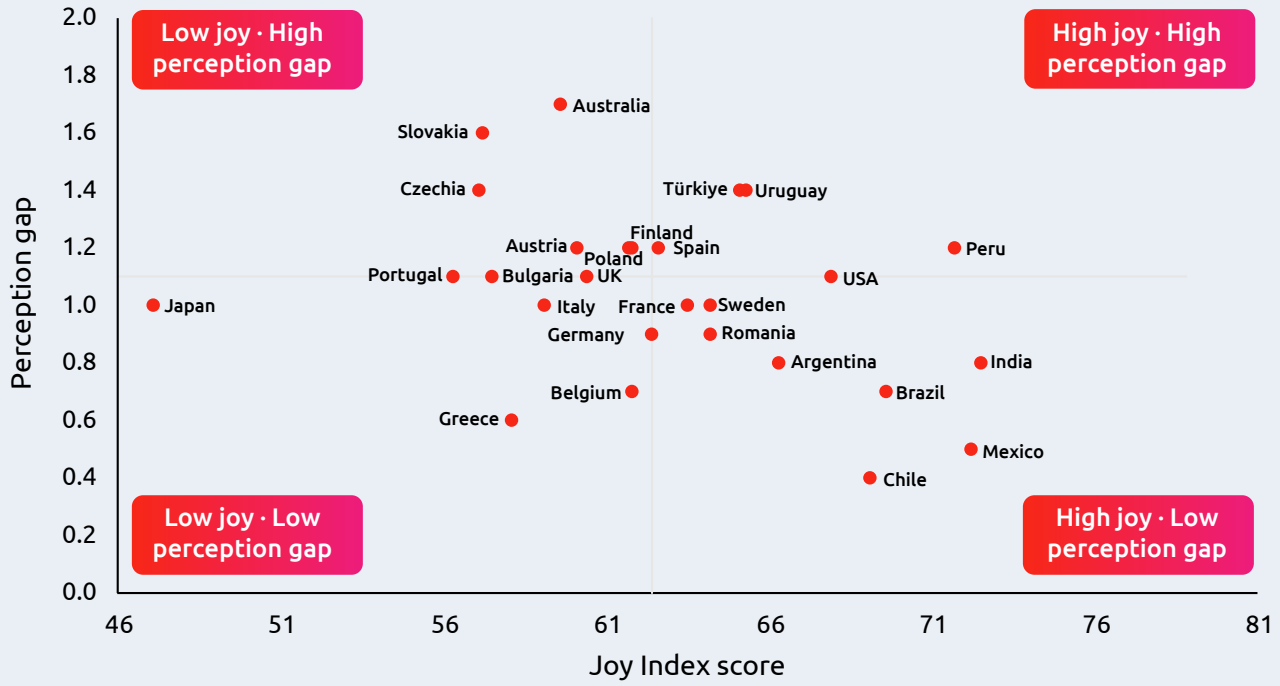
However, this pattern is not absolute. Ranking every market from the smallest to the biggest joy perception gap demonstrates notable outliers:

Uruguay and Türkiye, while both in the top 10 for worker joy scores, still show gaps of **+0.4 points above the global average.**

Australia has the widest gap, even though it is not the lowest-scoring market on the Joy Index.

Japan's gap is exactly at the global baseline, suggesting HR leaders mirror worker reluctance to over-index on positive responses.

Joy Index score versus perception gap, by country



The perception gap widens with age, but narrows, and eventually reverses, with seniority

Gen Z workers report the highest joy of any generation (7.0 out of 10) and the smallest perception gap (0.6). By contrast, Gen X and Boomers report lower joy (6.3) and the widest perception gap (1.4).

Seniority tells a different story. Mid-level employees show a 1.4-point gap, but senior executives rate their own joy at 7.8, higher than the average HR leader's estimate of 7.6.

HR leaders may be right to worry about the workforce broadly, but they may be underestimating just how well things are going at the top … a perception gap in the opposite direction.

Joy Index of countries with the **highest HR leader perceptions (8.0 and over):**

68

(5 points above average)

Joy Index of countries with the **lowest HR leader perceptions (7.2 and under):**

56

(7 points below average)



Working for responsible organizations

Belief that a company does social good isn't immune to the perception gap. Just 59% of workers globally agree that their organization demonstrates social and environmental responsibility, a full 13 points behind feeling part of a team (72%). 70% of workers who believe their employer acts responsibly say they feel more productive at work than 12 months ago, versus only 12% who do not believe their company acts responsibly. CSR credibility is built the same way trust in culture and leadership is – through consistent, visible action that employees experience day by day.

HR leaders are broadly aligned with how employees feel, but not fully calibrated. Sentiment moves in the right direction. Where they rate joy least confidently, worker-reported joy really is lower. But the gap widens in lower-joy markets, suggesting the problem is one of calibration rather than just visibility.

Moving from an annual survey to even one additional pulse check a quarter would give leaders a live read on the markets where their confidence is currently least reliable, helping close the gap before it becomes a bigger risk.

Romain Monthaye
HR Director – Benefits & Engagement, Edenred

Employer brand advocacy



When it comes to whether employees would recommend their employer to a friend, the picture is similar, only the gap is wider.

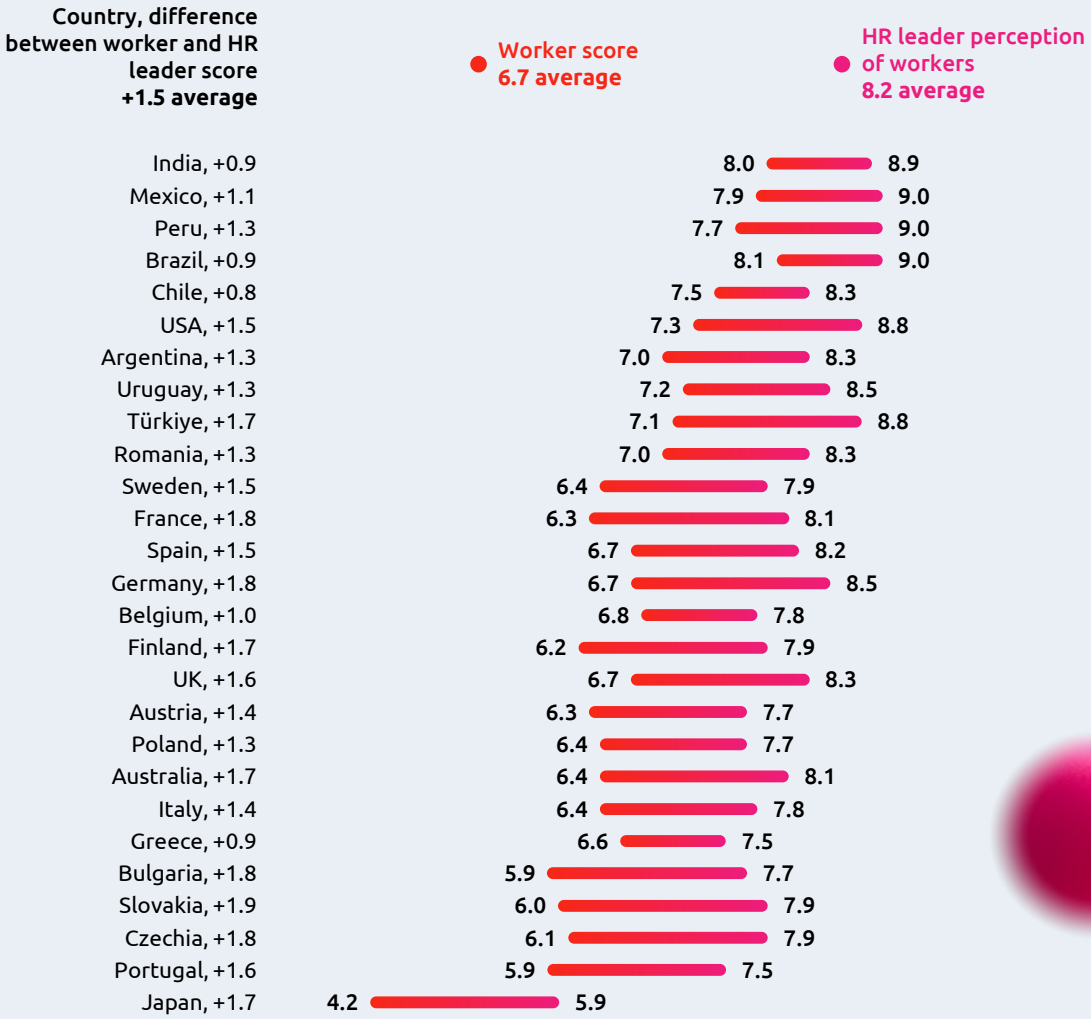
Average HR leader rating: 8.2 out of 10.

Average worker rating: 6.7 out of 10.

Disconnect: An average +1.5-point gap, with the largest in 3 out of the 5 lowest-scoring markets: Slovakia, Czechia and Bulgaria – **Central & Eastern Europe.**

Likelihood to recommend the organization as a place to work, by market

Workers vs HR leaders; average perception gap, ranked by highest overall Joy Index score, 0–10 scale



Engagement perception and reality

HR leader's view:

- **66%** believe employees are *more* engaged than a year ago.
- **6%** believe employees are *less* engaged than a year ago.

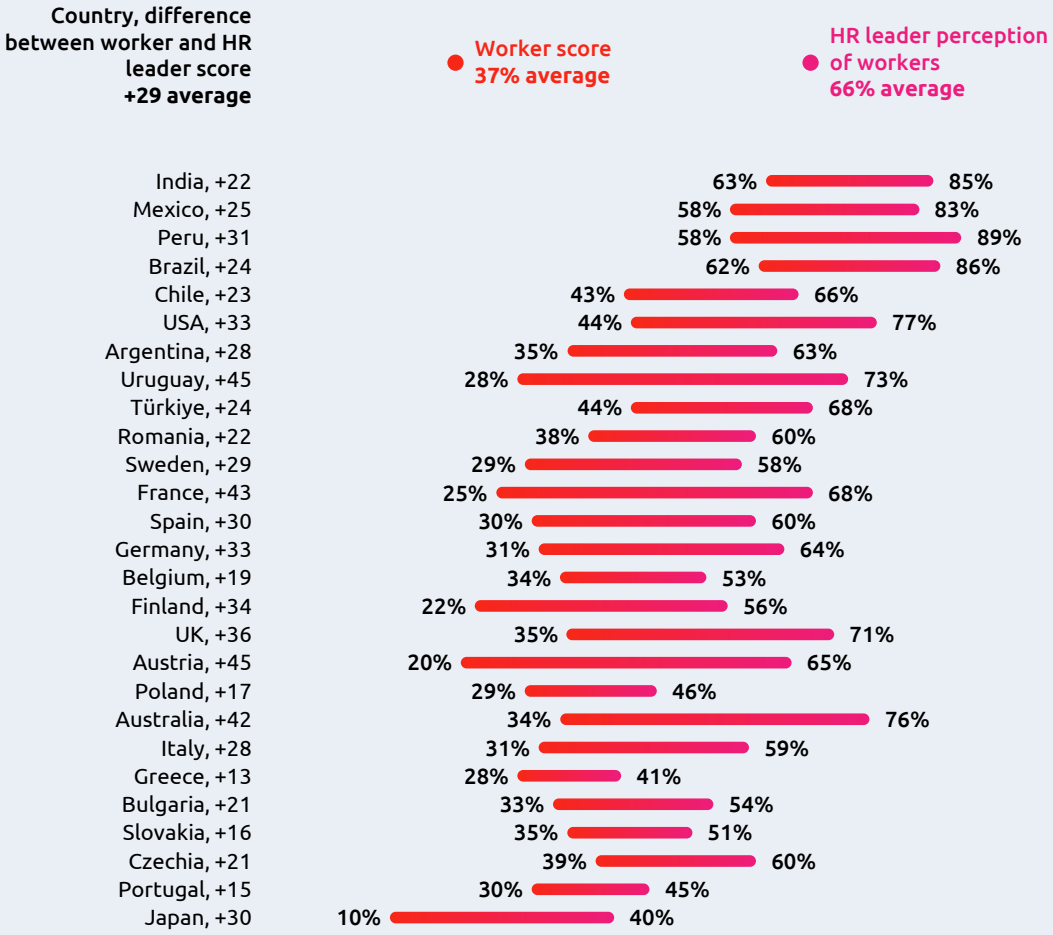
Worker view:

- **37%** say they are *more* engaged than a year ago.
- **18%** say they are *less* engaged than a year ago.

Disconnect: HR leaders are far more upbeat about engagement than workers themselves. Take the share who think engagement has gone up and subtract the share who think it's gone down, and HR leaders land at **+60%**. Workers land at just **+19%**. That **41-percentage point gap** suggests either workers aren't telling HR the full story, or HR has less visibility into day-to-day engagement than it assumes.

Employees feeling more engaged at work compared to 12 months ago, by market

Workers vs HR leaders; average perception gap, ranked by highest overall Joy Index score



Productivity shifts

HR leader's view:

- **69%** believe workers are *more* productive than a year ago.
- **6%** believe workers are *less* productive than a year ago.

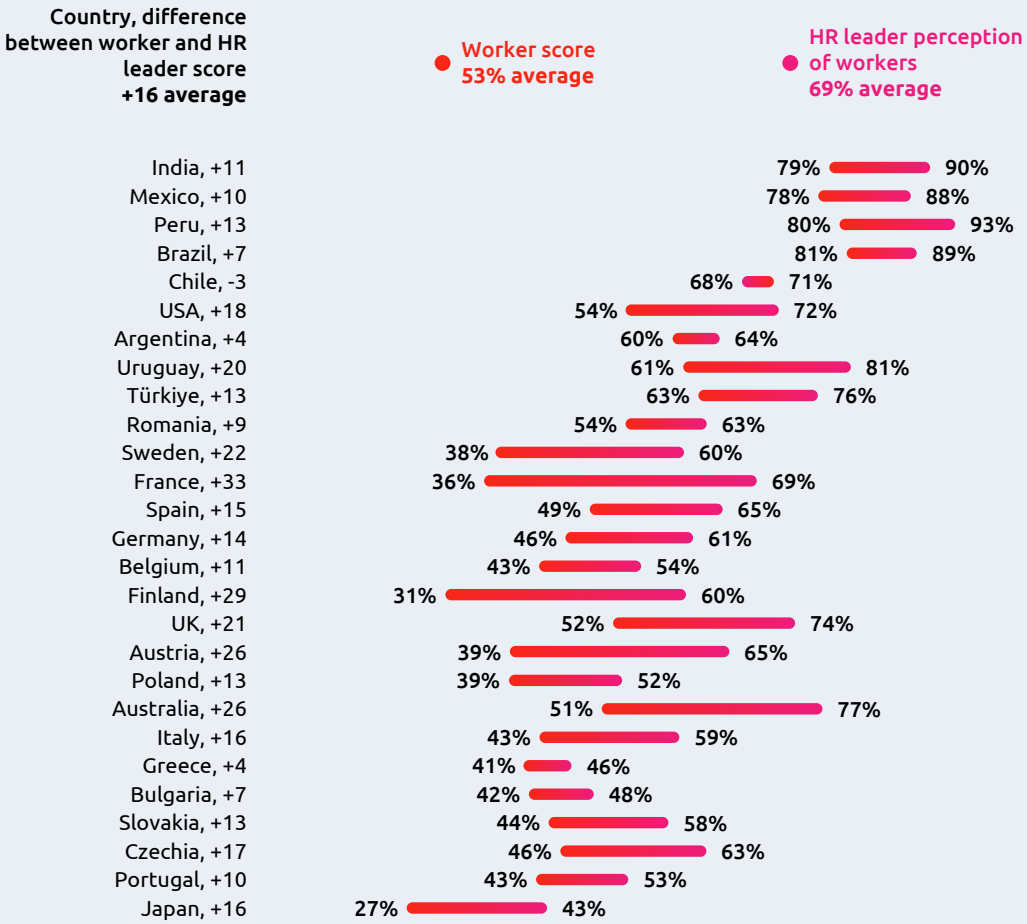
Worker view:

- **53%** report feeling *more* productive than a year ago.
- **11%** report feeling *less* productive than a year ago.

Disconnect: Netting these figures reveals a **21-percentage point gap** between HR leaders, with **+63%** who say productivity has increased compared with **+42%** among workers. While both groups broadly agree that productivity has improved, leaders appear notably more confident about the scale of that improvement than workers themselves feel day-to-day. This suggests HR may be somewhat overestimating gains, or that workers' sense of their own productivity doesn't fully register the improvements leadership is seeing in their own outputs or performance data.

Employees feeling more productive at work compared to 12 months ago, by market

Workers vs HR leaders; average perception gap, ranked by highest overall Joy Index score



Communication and feedback culture

HR leader's view:

- 74% rate the quality of feedback and performance with managers as "good" or "excellent."
- 7% rate the quality of feedback and performance with managers as "poor" or "very poor."

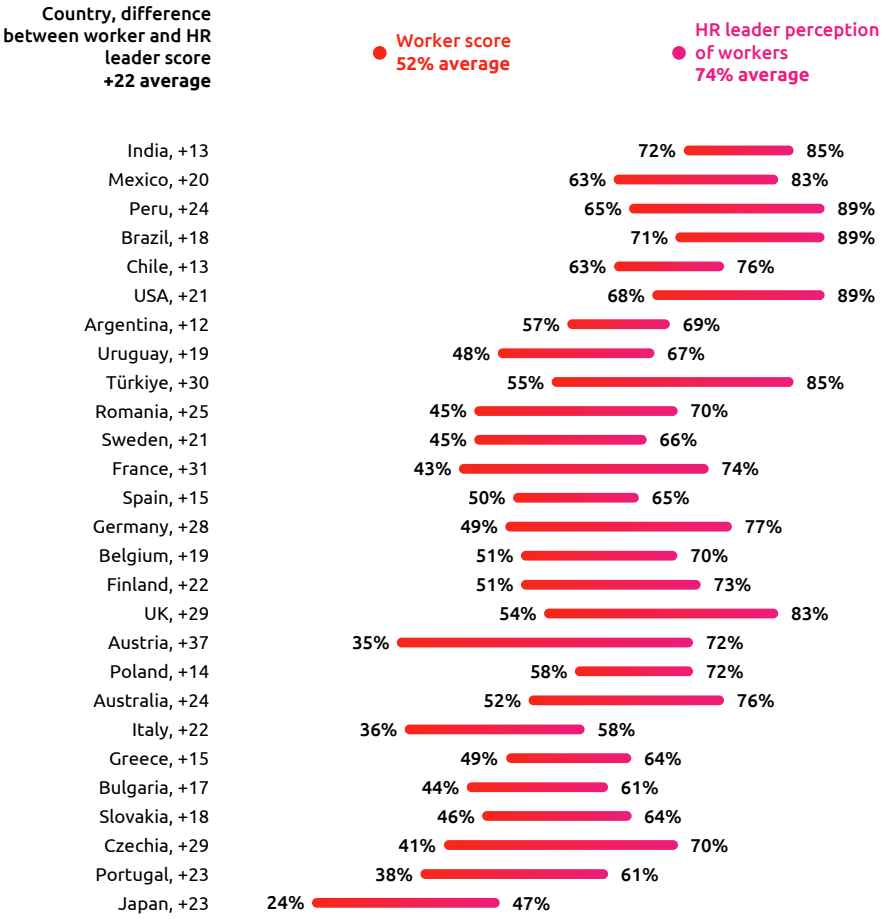
Worker view:

- 52% rate the quality of feedback and performance with managers as "good" or "excellent."
- 19% rate the quality of feedback and performance with managers as "poor" or "very poor."

Disconnect: HR leaders report a net satisfaction score of +67%, compared to +33% among workers. **The 34-percentage point gap** is one of the widest in the data, suggesting HR leaders may be significantly overestimating how well feedback and performance conversations are landing with employees, or that the quality bar they hold managers to is simply higher than leaders assume.

Frequency and quality of feedback and performance with managers rated as "Good" or "Excellent" by market

Workers vs HR leaders; average perception gap, ranked by highest overall Joy Index score



Measurement of employee satisfaction

HR leader's view:

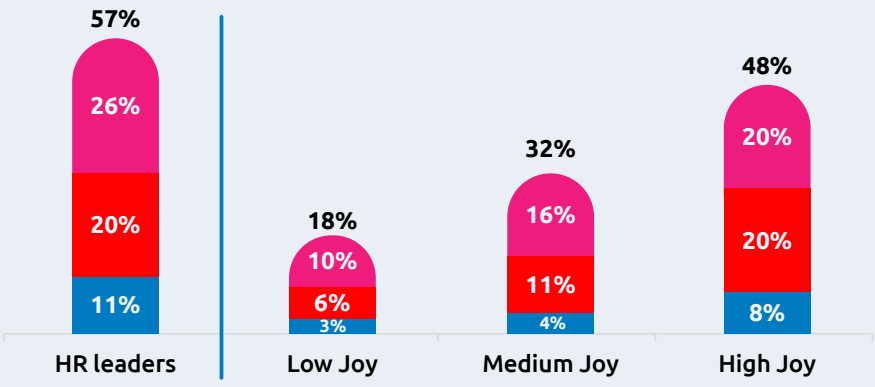
Leaders say their organization measures employee engagement or satisfaction (including performance reviews, one-on-one meetings, informal feedback sessions and employee surveys) every 6 weeks (8.7 times per year).

Worker view:

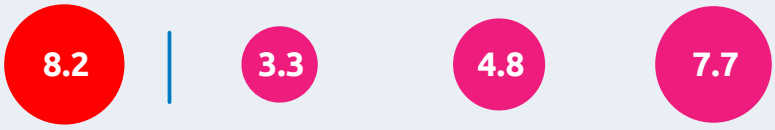
Workers say their organization measures employee engagement or satisfaction (including performance reviews, one-on-one meetings, informal feedback sessions and employee surveys) every 10 weeks (5.2 times per year).

Disconnect: HR leaders believe their organization checks in on employee sentiment roughly every six weeks, while workers experience it closer to every ten. That means workers may be receiving three to four fewer check-ins a year than HR leaders assume. If organizations are measuring sentiment less often than their own HR teams believe, early warning signs of disengagement have more room to build unnoticed before the next check-in catches them.

Frequency of measurement of employee engagement or satisfaction among HR leaders and workers, by Joy Index score



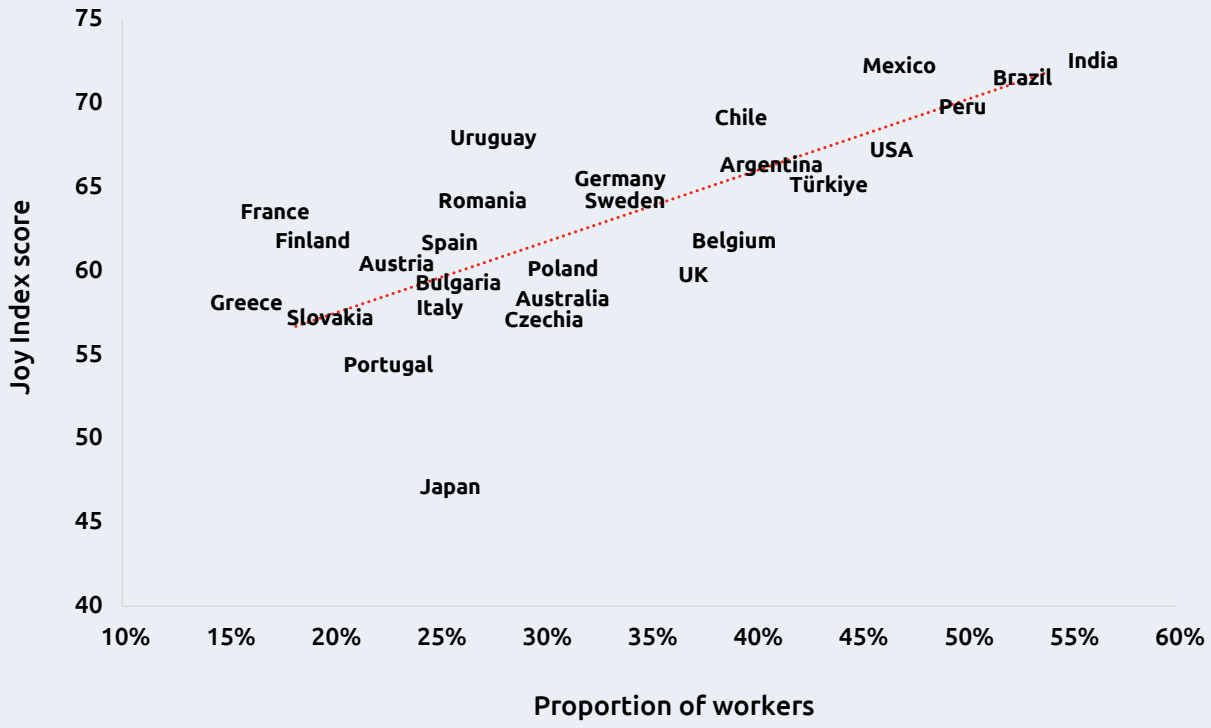
Average number of engagements per year



Once every two weeks+ Once every month Once every 3 months

Workers in countries with higher Joy Index scores are also more likely to say their organization measures employee satisfaction at least quarterly.

Proportion of workers who say their organization measures employee engagement or satisfaction at least quarterly, by Joy Index score and market





Understanding the gap

HR leaders are stretched across a set of primarily future-facing priorities

HR leaders are being asked to do more with less focus. With 12+ competing priorities on their plate, attention is spread so thinly that no single issue gets the depth it needs, or commands even a third of attention. Budgets and leadership focus are both finite resources. When leaders are stretched across this many fronts, it becomes harder to stay closely attuned to how employees are actually thinking and feeling day-to-day, and easier for early warning signs on decreasing morale, retention or engagement to slip through the gaps.



What are your organization's top three HR priorities for the next 12 months?

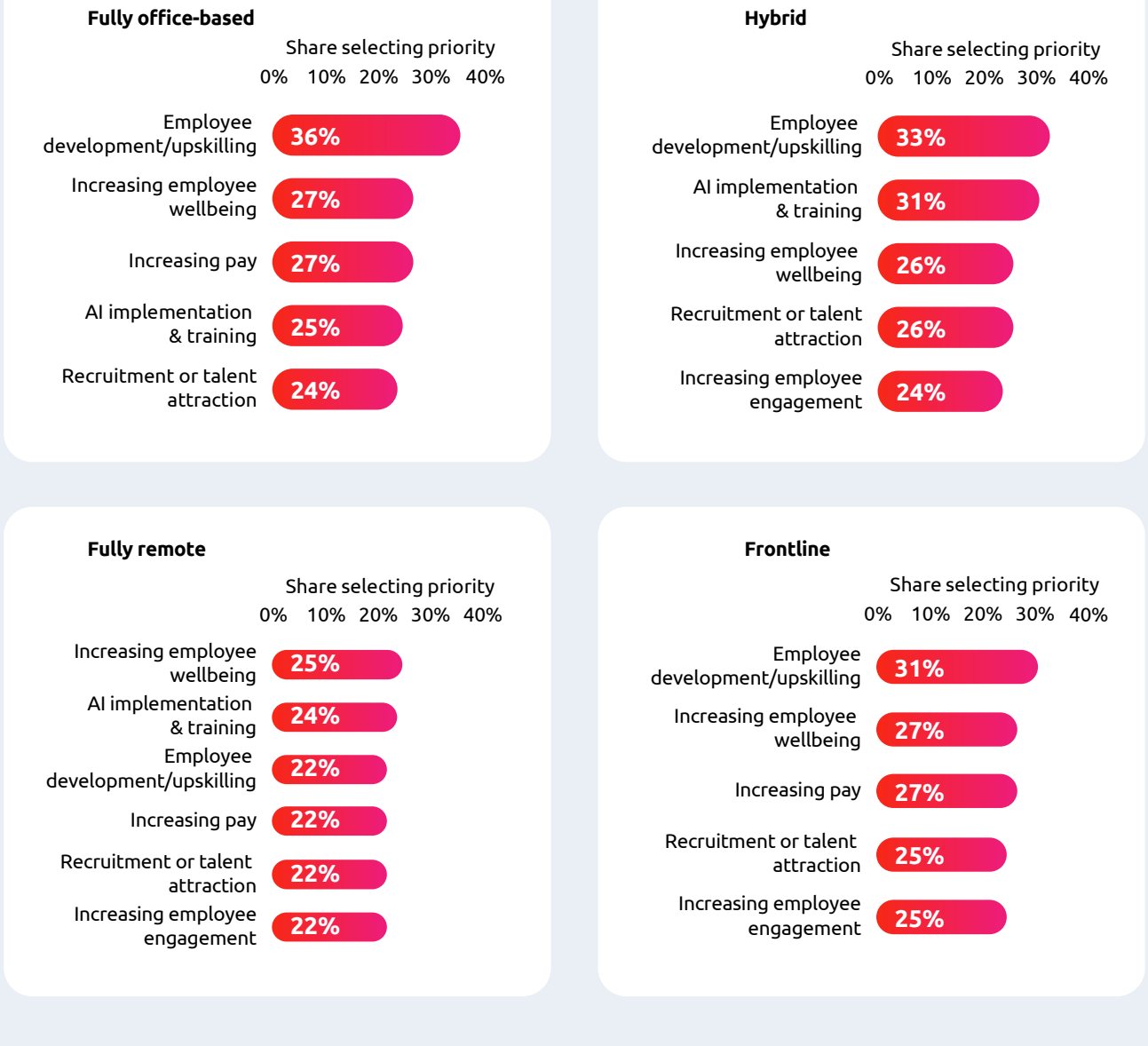
HR leaders (N = 8,920)



This lack of focus becomes even harder to manage once you consider that priorities aren't universal. HR priorities understandably shift depending on how and where people work, so what matters most to office-based staff isn't necessarily what matters most to frontline or deskless workers. There is no one-size-fits-all strategy; prioritizing the most impactful initiatives depends heavily on an organization's distinct workforce composition and operating model.

Top 5 HR priorities, by working arrangement

HR leaders (N = 8,920)





Increasing employee wellbeing features as the top priority for HR leaders in fully office-based, hybrid and frontline organizations, while HR leaders in fully remote organizations are more concerned with employee wellbeing and AI implementation and training.

All feature employee development in their top three. Leaders in fully remote companies place greater importance on DE&I than others, while those in frontline organizations show the lowest prioritization of AI implementation and training.





Every type of work arrangement features employee development/upskilling as a top three priority, with most placing it in the #1 spot. **But employee development is a future-facing, capability-building priority rather than a present-tense, sentiment-reading one.** Upskilling asks "where do we need people to be in a year," not "how do people actually feel right now.

The same is true of AI implementation and training (a high priority for hybrid workplaces) and recruitment (a high priority for frontline workplaces): these are all forward- or outward-looking priorities. None of them require or reward accurately reading current employee sentiment, since "are we upskilling enough people" and "do we feel engagement is up" are two very different questions.

Michelle Kujawa
Learning and Performance Consultant, Edenred

A strategic performance driver, not a cost center

It's easy to view these numbers as soft culture metrics, but in reality, employee joy impacts risk and return. Every business understands the P&L impact of lost output, disengagement and employee turnover – and workplace joy is a lever that mitigates these risks, rather than a standalone expense competing for budget.

To put this into context: Gallup estimates disengaged employees cost the global economy roughly $8.8 trillion–$10 trillion a year in lost productivity[2], around 9% of global GDP. Separately, the cost of replacing a single departing employee typically runs 50–200% of their annual salary[3], or $4,700–$5,475 for replacing a single non-executive role, according to SHRM's 2025 benchmarking data.[4]

Based on the SHRM benchmark, a 1,000-person organization closing the 31-point retention gap between its High Joy and Low Joy workers could potentially avoid around $1.46 million–$1.70 million in replacement hiring costs a year. As shown, even a modest shift in the High Joy/Low Joy split translates directly into avoided cost at these rates.



What this looks like in practice – an example from the UK

For organizations wanting to model this against their own numbers, Reward Gateway | Edenred's UK ROI calculator shows how investing in engagement and recognition can translate into real retention and productivity gains. It's built around UK tax rules and benefits, so the numbers won't carry over directly to other countries, but it's a useful example of the same ideas in this report working in practice, and a good starting point if you're building a business case for your own market.

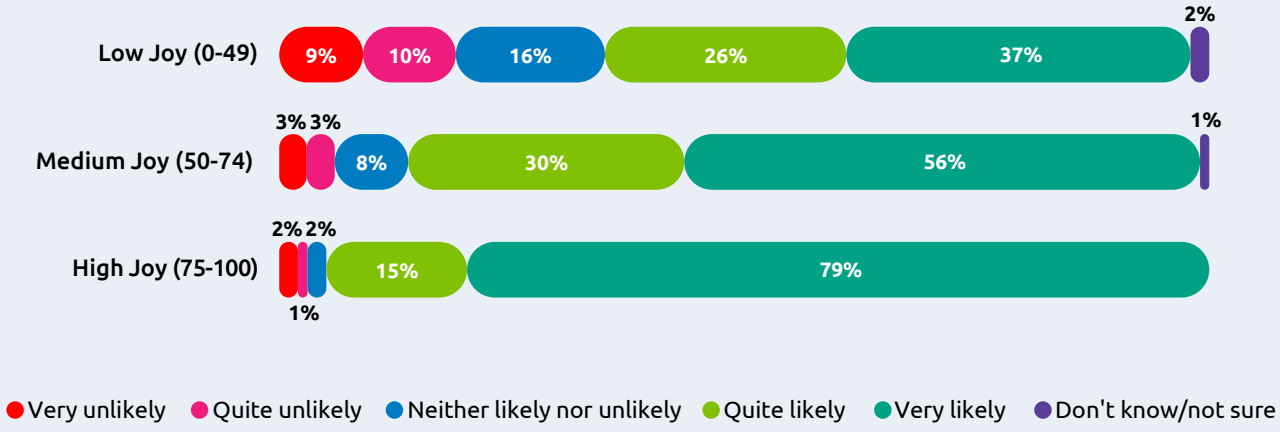
2 https://www.gallup.com/workplace/708071/global-employee-engagement-continues-decline.aspx
3 https://www.americanprogress.org/article/there-are-significant-business-costs-to-replacing-employees/
4 https://www.shrm.org/about/press-room/shrm-releases-2025-benchmarking-reports--how-does-your-organizat

Joyful workers stay put

Joy Index scores correlate directly with the metrics that sit at the top of every HR leader's scorecard: retention, productivity, advocacy and engagement. Businesses that treat joy as a driver of growth, rather than a cost center, have a clear evidence base to make that case.

94% of High Joy workers expect to still be with their employer in a year vs 63% of Low Joy workers.

Likelihood to stay with current employer in next 12 months, by joy index score



So, what actually keeps workers – and joyful workers – in place? The retention gap shown above comes down to a handful of concrete, addressable factors. When we asked workers directly why they choose to stay, the answers point less to pay and more to the everyday experience of the job itself.

Top 5 reasons they decide to stay



At Brasserie Vanuxeem, we recognize the importance of employee wellbeing to attract and retain staff. Beyond essential benefits like meal vouchers, we foster a positive work environment by organizing annual gatherings, Saint Nicholas gifts, and special celebrations for Mother's and Father's Day. Birthdays are marked with shared breakfasts or drinks, and in recent years, we have covered registration fees for employees and their families to the city marathon. This year, we are also hosting a free mountain bike ride for staff and their loved ones. These gestures help to strengthen workplace relationships both inside and outside the company.

Margaux Raedt
HR Manager, Brasserie Vanuxeem (Belgium)

Top 3 reasons: **High Joy**

64%	54%	51%
Enjoying the work	**Feeling secure in their job**	**Liking their colleagues**

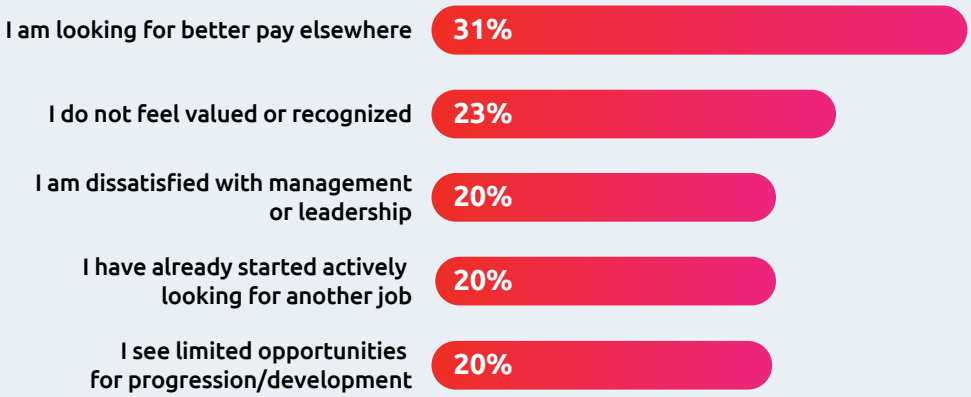
Top 3 reasons: **Low Joy**

46%	33%	24%
It would be difficult to find a better role elsewhere	**Feeling secure in their job**	**Good work-life balance**

Attracting skilled employees is consistently one of HR's toughest and most costly challenges, and much of the current response is to over-invest in upskilling. But employee joy has a direct bearing on how an organization is perceived by the labor market, and retention driven by genuine attachment reduces the recruiting spend needed to backfill roles.

Of course, the flip side matters just as much. HR leaders also need to know what pushes people towards the door and whether those triggers differ by how happy someone already is. They do. High Joy and Low Joy workers diverge sharply on why they plan to leave their jobs, and retention risk also doesn't have a universal solution.

Reasons they decide to leave



Top 3 reasons: **High Joy***

20%	10%	10%
Considering retirement	**Wanting more flexibility**	**Changing industries**

Top 3 reasons: **Low Joy**

40%	36%	31%
Looking for better pay	**Feeling undervalued**	**Dissatisfied with leadership**

**"Other" was the second most selected response among High Joy workers (12%) but is excluded from the ranked reasons because it does not identify a specific driver.*

The research shows that professionals remain with a company mainly because of the work environment, job security, and work-life balance, with remuneration coming only afterwards. However, when they consider leaving, salary becomes the primary reason. This underscores how a positive organizational climate is essential to retain talent, but if pay or recognition are insufficient, everything else loses value. Companies need to understand and maintain this balance to keep their employees engaged.

Vanete Barros
People Administration Supervisor, Techmail (Brazil)

Joyful workers are more productive

Joy also changes how productive workers feel. The gap between High and Low Joy workers is stark, and the gap between what drives that productivity shows striking similarities to what drives joy in the first place.

73% of High Joy workers feel more productive than 12 months ago.

27% of Low Joy workers say the same.

Disconnect: What drives productivity does not always align with what HR assumes are its biggest challenges.

What makes you productive at work?

All workers (N = 17,450)



Productivity is shaped by the experience people have every day, not simply by tools, pay or programs. When work is meaningful with visible and valued impact, and people feel a genuine sense of connection and belonging, they are more engaged and more likely to perform at their best. This reinforces employee experience as one of the most important levers leaders have to drive both engagement and performance.

Fiona Blaine, Employee Experience Manager, O'Brien (Australia)

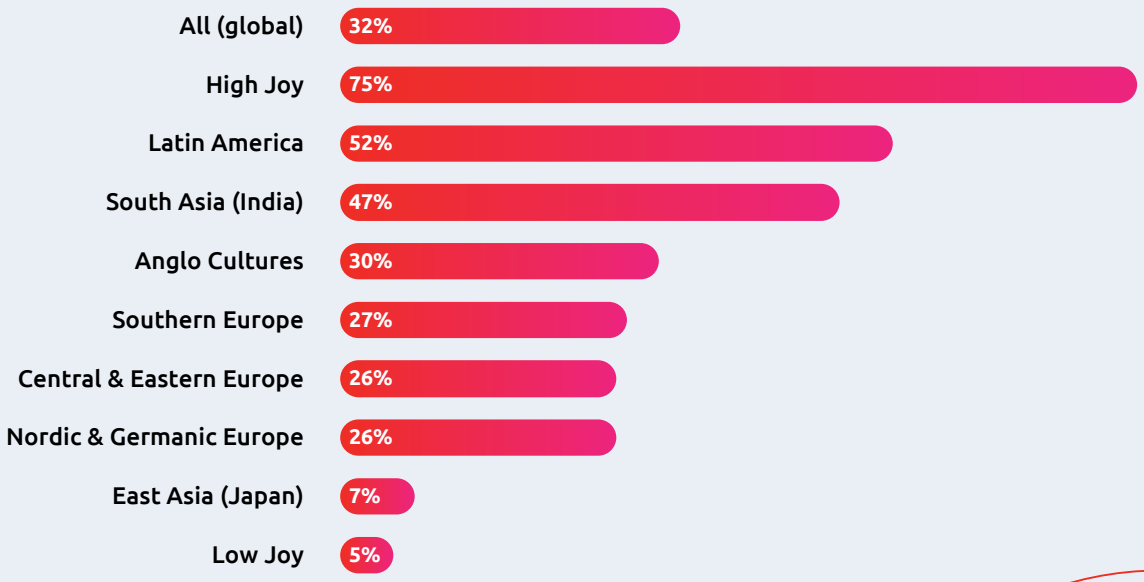


Joyful workers are more engaged

High Joy workers report engagement levels that outpace every regional and cultural grouping in the study. How someone feels about their work matters more to engagement than where in the world they're doing it.

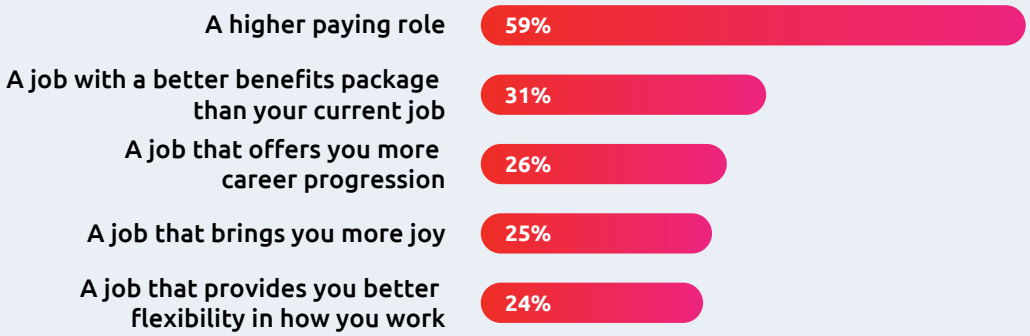
Because engagement is a leading indicator of both productivity and retention, leadership underestimating the importance of employee joy will end up risking both.

Percentage of employees who rated engagement while working 9 or 10 (out of 10)



Employees who lack joy have different priorities

The most important factor workers look for in a new role



But ...

When evaluating new opportunities, engaged and productive employees prioritize long-term cultural and developmental benefits over short-term pay increases:

- **Productive workers:** Employees reporting higher productivity are significantly less likely to prioritize base pay (56%) when job hunting, placing greater weight on better benefits (33%) and career progression (32%).
- **Engaged workers:** Similarly, highly engaged employees place less emphasis on salary alone (55%), preferring superior benefits (34%) and growth opportunities (32%).
- Conversely, employees who are unlikely to recommend their current employer actively seek workplaces that offer greater day-to-day joy (35%).

In a nutshell: the workers that organizations are at greatest risk of losing are disproportionately motivated by pay, and pay, as we've seen, is the most expensive and least durable retention lever.

Meanwhile, the workers who report better productivity and engagement and therefore the most worth investing in are disproportionately motivated by benefits, progression and joy, and less motivated by pay when job hunting.

That is the business case in a single sentence: that joy is not a cost center competing with the P&L, but a cost-effective and accessible way to protect it.

Jacques Adoue
EVP of HR, Edenred

The building blocks of joy

So far, we have shown what workplace joy delivers for business performance, from significant retention gains to measurable productivity lifts. But if HR leaders are going to act on these findings, they need to know what actually builds and sustains joy in the first place.

The data reveals a meaningful gap between what leaders assume matters and what workers actually report as top drivers. Closing this gap requires moving away from viewing benefits as a random list of isolated perks and treating them as a joined-up, strategic ecosystem.

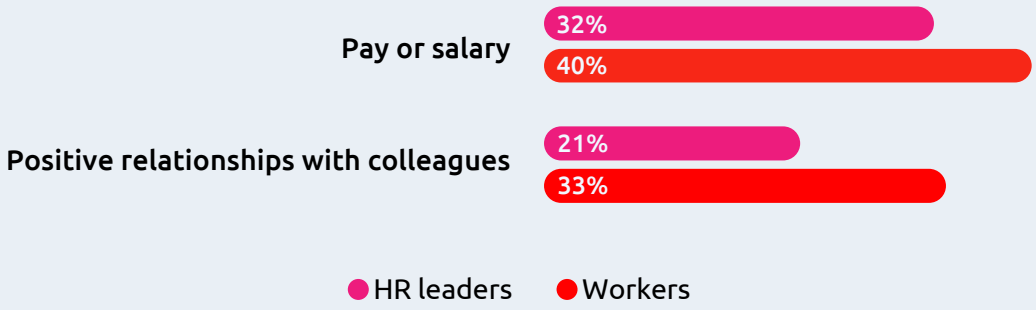


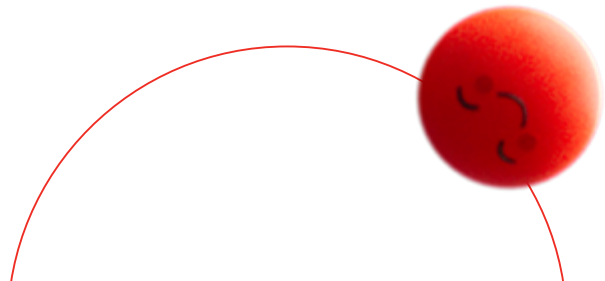
Joy drivers: the perception gap

When asked what contributes most to workplace joy, workers place greater importance on everyday relationships than HR leaders assume. While pay remains the leading factor for workers at 40%, 33% cite positive relationships with colleagues, compared with just 21% of HR leaders.

Which factors contribute most to your joy/employee joy at your organization?

HR leaders vs workers







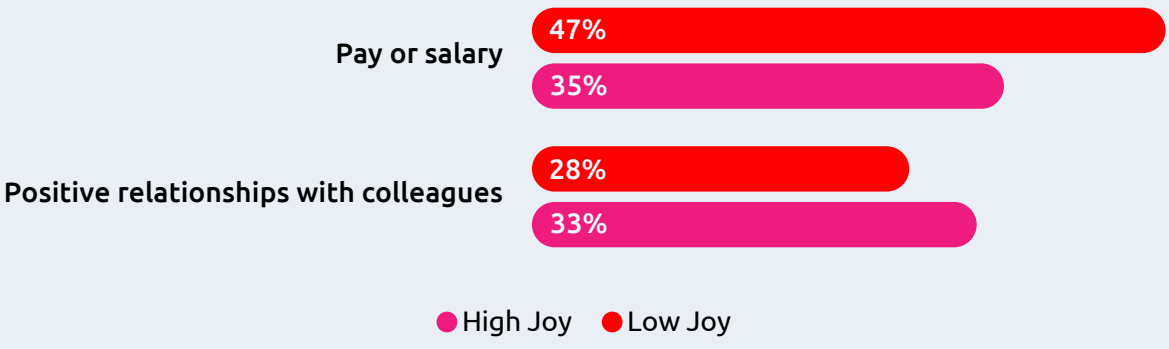
Shifting priorities: from base pay to workplace culture

Look closer at the worker data and the split makes complete sense: pay matters far more to Low Joy workers (47%), while positive relationships matter far more to High Joy workers (33%). This demonstrates that pay and culture are not competing priorities, but rather different stages of the same journey. Once basic financial needs feel met, relational and cultural drivers take over to build true joy and retention.

Frontline workers are especially likely to say that positive relationships with colleagues contribute to joy at work (36%), compared to 24% of fully remote workers, who placed work-life balance and job security ahead of workplace relationships.

Which factors contribute most to your joy/employee joy at your organization?

Low Joy vs. High Joy workers

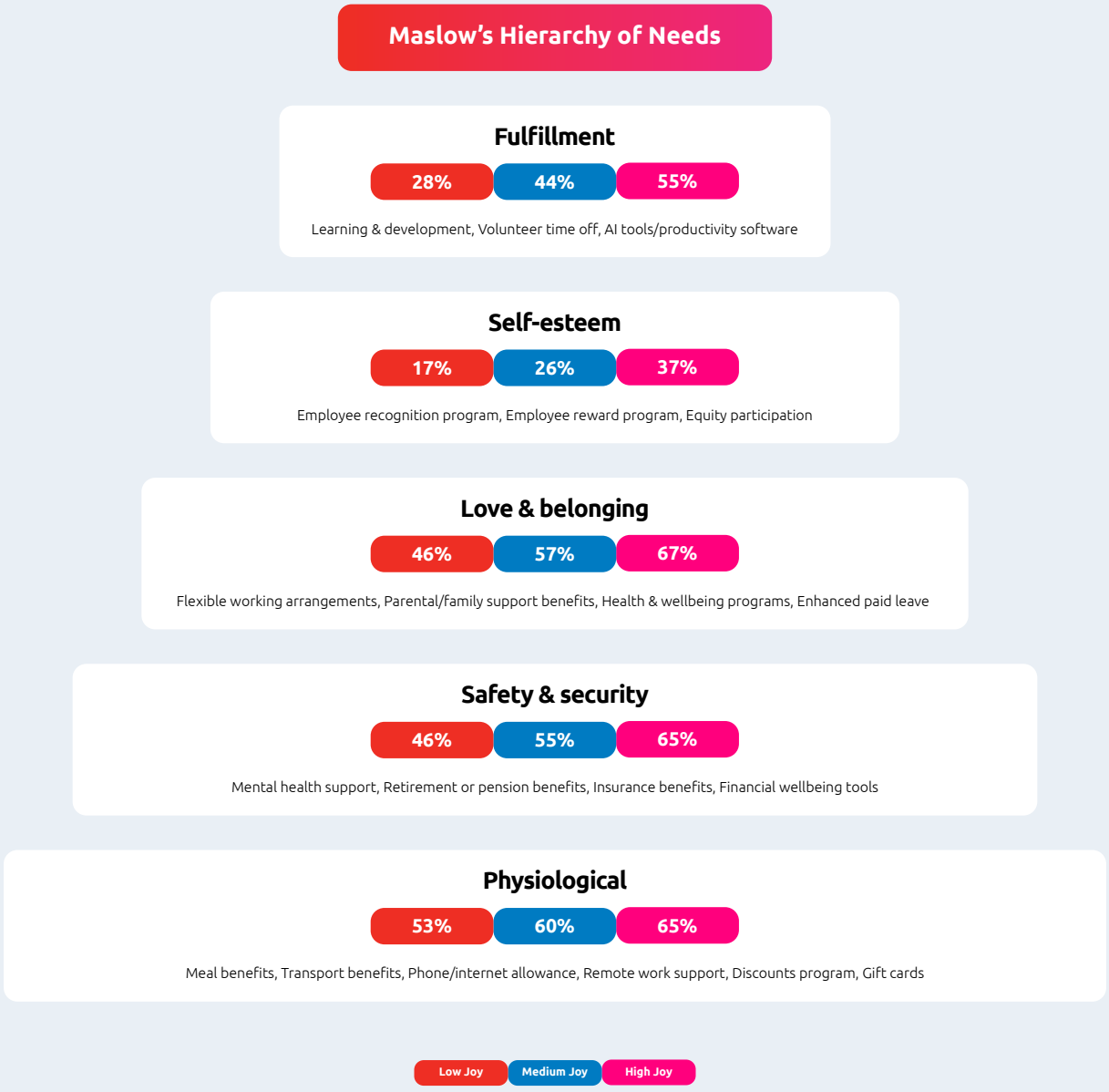


A systematic approach to total rewards

Benefits work best as an interconnected ecosystem rather than a collection of standalone initiatives. Using **Maslow's Hierarchy of Needs** as a framework, employee benefits fulfill distinct roles across an employee's experience, from removing foundational daily friction to driving long-term organizational fulfillment.

No single benefit transforms workplace culture in isolation. The research demonstrates a powerful compounding effect: burnout drops from 19% among workers receiving a single benefit to just 11% for those receiving ten or more, while retention likelihood under the same circumstances increases to 90% and feeling productive reaches 66%. Building a joyful, resilient workforce requires supporting employees across every tier of need simultaneously.

Benefits and HR initiatives offered according to workers, by Low, Medium and High Joy index scores



Foundational support: protecting purchasing power and removing friction

Basic financial pressure is a primary driver of workforce stress and disengagement.

Foundational benefits, such as meal vouchers, gift cards, and employee discount programs, address physiological and security needs directly by easing cost-of-living strain and protecting real purchasing power.

Core benefits like gift cards, shopping vouchers, and discount programs provide immediate financial breathing room. Among workers who receive gift cards and shopping vouchers, 59% report feeling more productive than 12 months ago, and 37% achieve a Joy Index score at least 9 points above the global baseline.

By removing everyday financial friction, these foundational benefits create the essential baseline stability employees need to engage in higher-tier cultural, developmental, and performance initiatives.



Small benefit, big impact

Meal vouchers do more than subsidize lunch; they ease a specific kind of financial pressure that's grown more visible as living costs have risen. In a separate annual survey conducted by Edenred in partnership with the FOOD Programme in 2026, workers pointed out concrete, practical benefits:

- 80% say meal vouchers directly enhance their daily food budget.
- 68% view them as a practical solution at the point of purchase.
- 56% report that meal vouchers directly reduce financial stress.
- 73% state they would improve the quality of their daily meals if their voucher allocation were doubled.

In an economic climate where real wage growth has stalled across many mature markets, meal vouchers offer one of the few benefits that address purchasing power directly and immediately.

Performance accelerators: driving retention, productivity and joy

While foundational benefits secure baseline stability, higher-tier initiatives act as strategic performance accelerators. The research reveals a strong positive correlation between joy and productivity: benefits that widen the gap between Low and High Joy workers are the same benefits that drive workforce output.

Top 10 employee benefits or HR initiatives provided to employees, by productivity

Workers reporting higher vs lower productivity compared with 12 months ago



% of respondents whose employer provides this benefit

Top 10 employee benefits or HR initiatives provided to employees, by Joy Index score

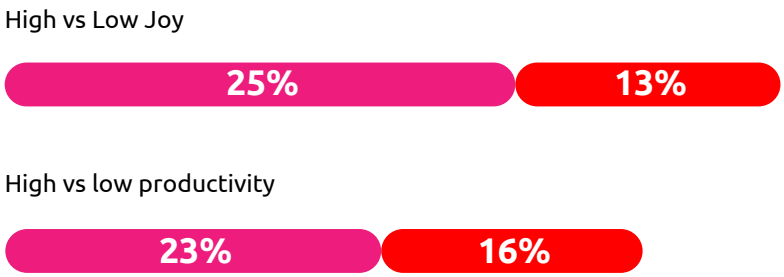
Low Joy workers vs High Joy workers



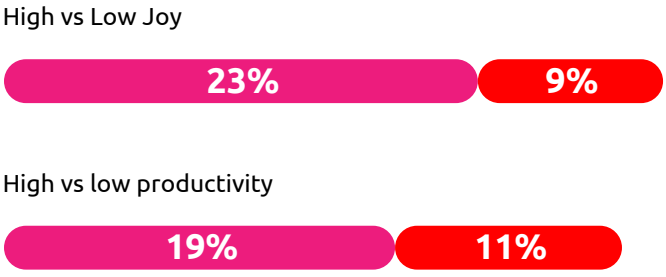
% of respondents whose employer provides this benefit

When comparing Low and High Joy workforces, three key employee benefits demonstrate a strong dual correlation with both joy and productivity:

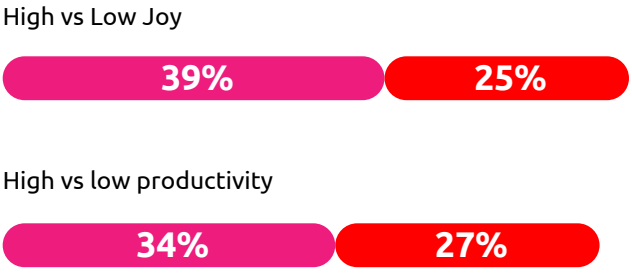
Health and wellbeing programs



Employee recognition or rewards platforms



Insurance benefits





Looking across the full research findings, the below categories emerge as primary drivers of long-term workforce performance:

- **Learning and development (fulfillment):** Learning and development opportunities represent the single largest differentiator in the study (+25 percentage point gap between High Joy and Low Joy workers: 45% vs. 20%), while ranking as the top driver for increased productivity (+12pt gap). Learning and development is the only benefit to feature in the top five across all three key study measures: joy at work, increased productivity, and overall Joy Index scores.

- **Health and wellbeing programs (safety and belonging):** Health and wellbeing initiatives serve as a vital dual-purpose investment, ranking as the second strongest all-rounder in the research. They widen the performance gap significantly across both overall joy (25% High Joy vs. 13% Low Joy) and self-reported productivity (23% high productivity vs. 16% low productivity).

- **Flexible working and work-life balance (belonging):** Core benefits including flexible working arrangements, meal benefits, and enhanced paid leave show a strong positive correlation with sentiment: they are an average of 11 percentage points more prevalent among High Joy workers compared to Low Joy workers, and 3 percentage points more prevalent among highly productive employees.

- **AI tools and software (productivity enablers):** Among workers who receive AI tools or software for work, 65% feel more productive (compared to the 53% average across all workers) and 40% achieve a High Joy score.

Wide-reaching benefits such as learning and development and health and wellbeing earn their place as genuine dual-purpose investments, while benefits like flexible working and AI tools each solve for one half of the joy-productivity equation particularly well.



Benefits matter most at career bookends

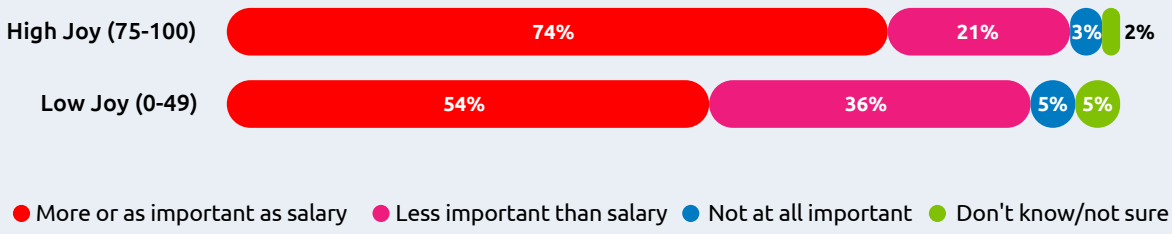
Across all respondents, 63% of workers rate employee benefits as equally important as, or more important than, base salary. Among High Joy workers, this figure rises to 74%, representing a striking reversal of the traditional assumption that pay always takes precedence.

The strategic value of benefits rises significantly at two key career stages:

- **Senior executive leadership:** 75% of senior executives rate benefits as important as, or more important than, base salary (compared to 60% of mid-level employees).
- **Early-career talent (Gen Z):** 1 in 5 Gen Z workers explicitly cite employee benefits as one of the top factors contributing to their day-to-day joy at work.

How employees value benefits compared with salary

High Joy versus Low Joy workers





Looking across the entire spectrum of benefits, every category evaluated correlates with a Joy Index score above the global average (63), demonstrating that while specific drivers accelerate peak performance, comprehensive coverage of employee benefits and HR initiatives creates a universally positive sentiment baseline:

Top 20 benefits provided, by Joy Index score

Benefit provided	Joy Index score
Financial wellbeing tools	71
Employee reward program or platform	70
Employee recognition program or platform	70
Remote work expense support	69
Phone/internet allowance	69
AI tools or productivity software	69
Learning & development opportunities	69
Stock options or equity participation	68
Volunteer time off	68
Health & wellbeing programs	68
Parental or family support benefits	67
Gift cards or shopping vouchers	67
Mental health support	67
Enhanced paid leave	67
Insurance benefits	66
Meal benefits	66
Flexible working arrangements	66
Retirement or pension benefits	65
Employee discounts programs or platform	65
Commuter or transport benefits	64



Belonging drives everyday culture, but trust in leadership secures it

Feeling a sense of belonging at work is a critical driver of overall sentiment. 94% of High Joy workers report feeling a strong sense of belonging at their organization (compared to just 33% of Low Joy workers), and 93% feel comfortable being their authentic self at work (against 38% of Low Joy workers).

However, the widest disconnect in the entire study centers on organizational leadership. Trust in senior leadership shows a massive **69-point swing** between sentiment tiers: 85% of High Joy workers trust their senior leaders, compared to just 16% of Low Joy workers.

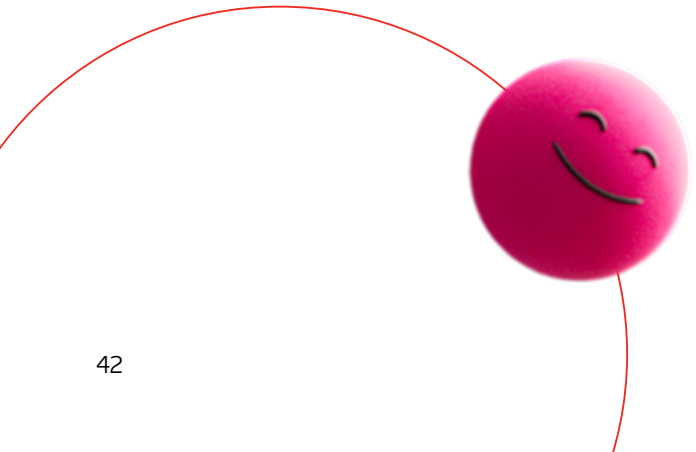
This demonstrates that while day-to-day colleague connection builds baseline belonging, establishing executive trust is the primary structural differentiator between a Low Joy and a High Joy organization. Improving leadership trust deserves equal priority alongside peer-to-peer culture initiatives when closing the workplace joy gap.

Aligning worker needs with HR leader priorities

While employees emphasize trust, culture, and foundational financial relief, HR leaders view flexible working and skills development as their primary operational levers. Examining what HR leaders identify as top productivity drivers reveals where executive strategies currently align with, or diverge from, worker expectations.

HR initiatives or benefits rated by HR leaders as strongest productivity drivers



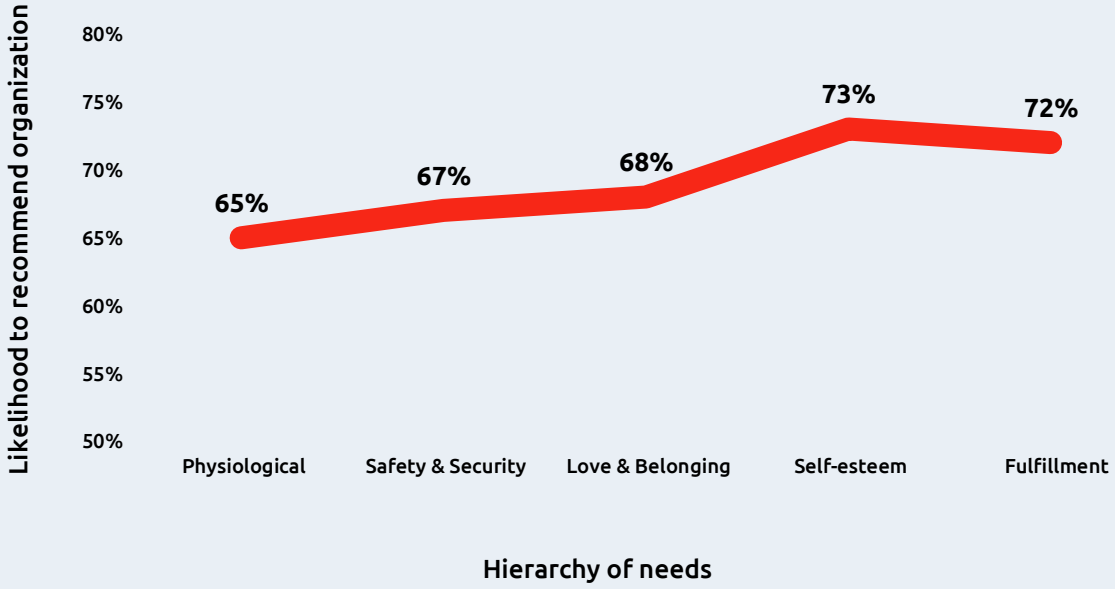




The advocacy dividend: from needs met to employee ambassadors

Addressing employee needs across the hierarchy does more than lift daily productivity; it directly fuels organizational advocacy. When organizations support workers across both foundational security and higher-tier fulfillment, employees' likelihood of recommending their employer increases dramatically across every tier.

Likelihood to recommend employer, by level of workplace need addressed



Benefits are HR's most credible lever

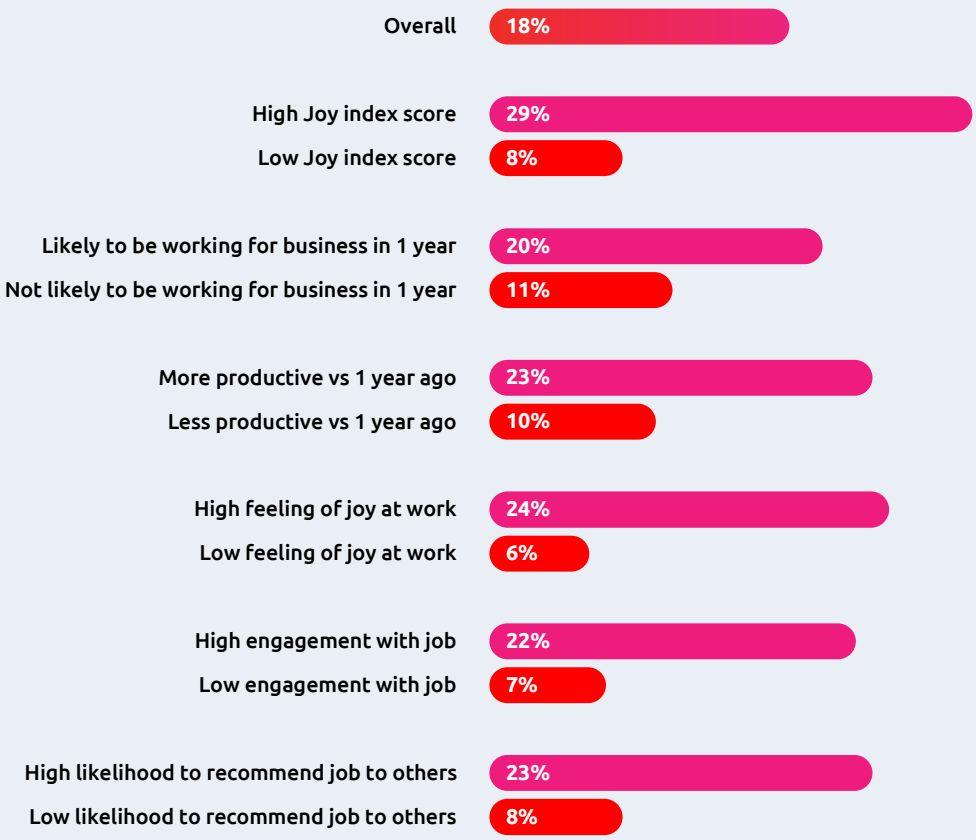
Benefits are the second most important factor workers look for in a new role (31%), trailing only higher base bay and placing ahead of career progression, flexibility or job security. **High Joy workers receive an average of five benefits, while Low Joy workers receive three** – a consistent gap maintained across every tier of the hierarchy.

Recognition: the lever with the fastest return on investment

Recognition can be embedded quickly and start paying off almost immediately, provided it's backed by the right framework, process, and visibility across the organization. That is what makes recognition so powerful: it is still surprisingly rare, yet it has a clear impact on one of this report's starkest findings.

Only 18% of workers receive recognition or appreciation, formal or informal, from their manager at least three times a month. Moving from zero instances of recognition a month to just one is enough to lift 12-month retention likelihood from 73% to 86%, while boosting productivity from 34% to 57%.

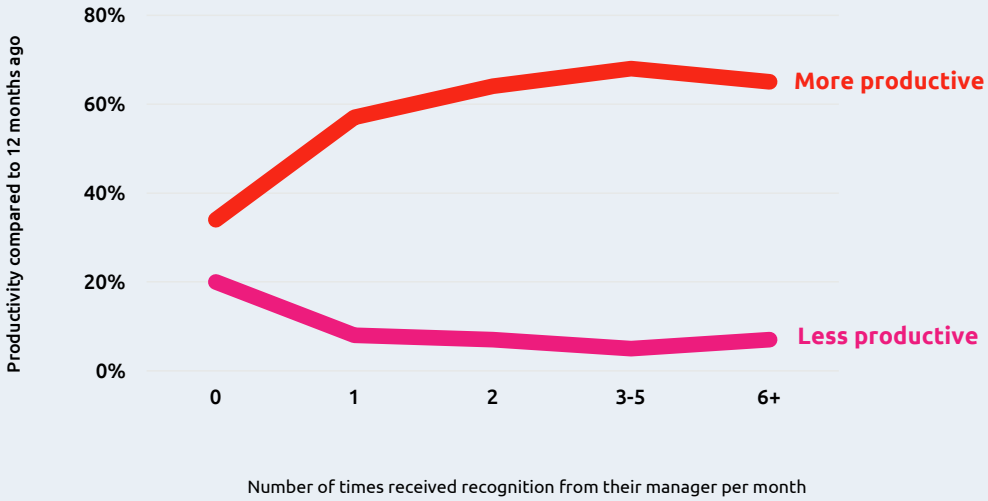
Percentage of workers that receive recognition (formal or informal) from their managers at least three times a month



Percentage of workers who feel unlikely to be working for their current employer in 12 months' time, by the number of times they receive recognition from their manager a month



Proportion of workers who are less productive vs more productive compared to 12 months ago, by the number of times they receive recognition from their manager a month





Start small and do it often

Recognition works best as a habit: small, frequent moments add up faster than occasional big gestures. Our own research[5] shows only around one in five employees say their organization actively enables regular recognition from managers or peer-to-peer appreciation, despite it being one of the most impactful levers for engagement, productivity and retention.

For managers, the takeaway is simple: don't wait for the perfect moment. Just start and keep it regular.

Unlike benefits further down the hierarchy, which require employees to feel their more basic needs are met before they register, recognition appears to work almost immediately and independently, which is what makes it such an accessible starting point for organizations not yet ready to overhaul their full benefits offer.

Recognition in practice at Suncorp Group Limited

For Suncorp Group Limited, recognition has become a powerful way to connect people, reinforce culture, and build a stronger employee experience at scale. Providing financial services and solutions to nine million customers, Suncorp employs over 11,000 people in a dispersed workforce across Australia and New Zealand.

That scale makes consistency of experience especially important. As a long-term client of Reward Gateway | Edenred for more than 10 years, Suncorp has embedded recognition into everyday working life, with more than 100,000 recognition moments sent in the past year alone. For Suncorp, recognition is not treated as a standalone initiative, but as part of how performance and culture are strengthened over time. As Neha Patel, Manager – Performance, Recognition & Benefits at Suncorp, explains: "Recognition has quietly woven itself into our performance story. When people are seen and heard at the right moment for the right things, it fuels pride, accountability, and ultimately drives great impact."

She adds: "Recognition is one of the most powerful yet underrated business levers. Done right, it drives engagement, boosts morale and strengthens performance across the board."

5 The workplace engagement index, Australia/New Zealand 2026

Longer service, lower recognition

Recognition is more common for less experienced workers: 48% of people working 21+ years received no recognition in the last month, compared to a third of those working five years or less. Workers who get recognized often (at least three times a month) report much higher joy, engagement and advocacy than those who rarely do: 29% vs just 8% on joy, with similar gaps in engagement and how likely they are to recommend their employer.

Joy scores by generation follow the same pattern: Gen X and Baby Boomers, the groups receiving the least recognition, also report lower joy than younger workers. Longer-serving employees may be the most overlooked group when it comes to recognition, and the data suggests that's costing more than goodwill.



Right now, the highest-impact step most organizations can take is simple: get every manager giving at least one meaningful thank-you a week, starting today. But habits built without any system behind them rarely last. Without something to prompt it, track it and spread it across teams, managers slip back into old habits within weeks. A recognition program or platform doesn't replace that habit, it's what keeps it going: the prompts, the visibility, the consistency that turn one manager's good intentions into something the whole organization does.

Chris Britton
People Experience Director, Edenred

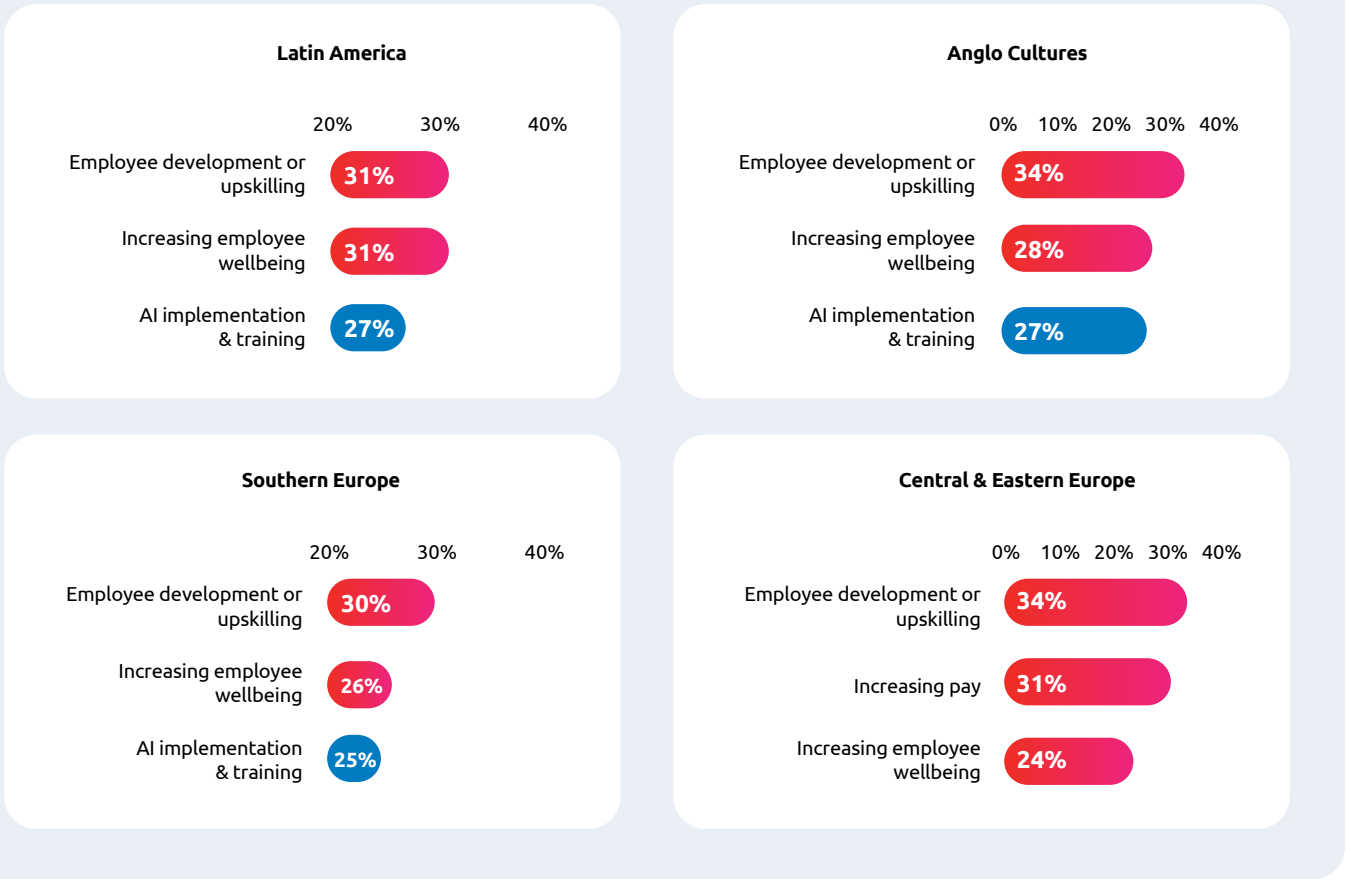
Looking ahead: AI and the future of workplace joy

Artificial intelligence dominates HR's forward agenda

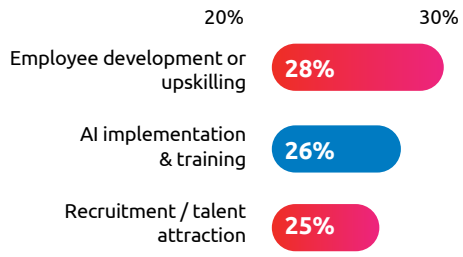
72% of organizations have implemented AI in at least some parts of the business, though only 23% have done so fully.

AI implementation and training are among the top three HR priorities in almost every region studied

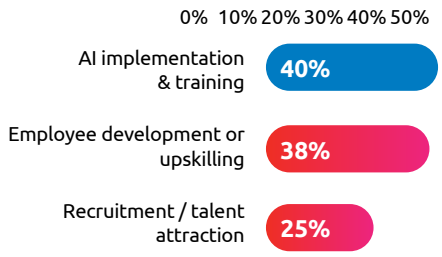
Top 3 HR priorities, by region



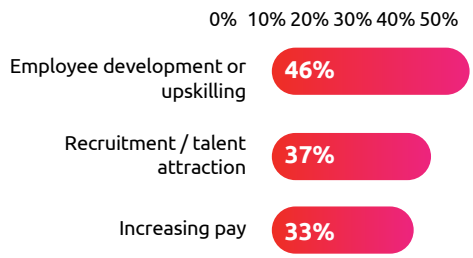
Nordic & Germanic Europe



South Asia (India)



East Asia (Japan)





HR leaders and workers broadly agree on its impact

- 73% of HR leaders believe AI implementation has helped employee engagement.
- Among those who say their engagement has increased over the past 12 months, 44% use AI often – well above the 33% average across all workers. The pattern holds for productivity too: 41% of workers who say their productivity has increased are also frequent AI users.

But ...

- AI usage shows no consistent correlation with a country's overall Joy Index score, and no correlation at all with lower burnout rates.
- The correlation between worker satisfaction and working arrangements with and without AI may be related to increased flexibility.

Employee satisfaction and flexibility experiences charted by frequent AI use at work (at least once a week) or none



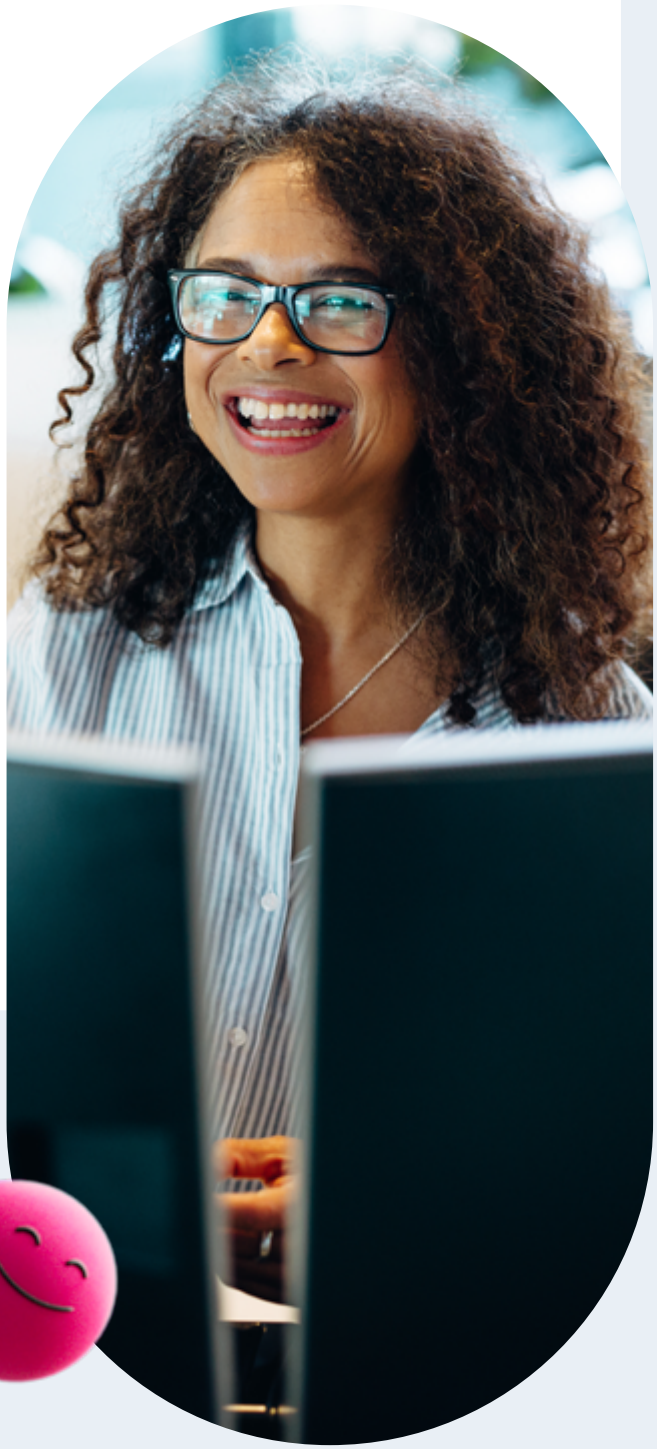
AI adoption tracks with individual productivity and joy for the people actively using it well, but it is not a silver bullet. Leaders should not assume AI rollout alone will move the needle on engagement: it may sharpen outcomes for engaged users without doing anything to close the structural gap for everyone else.

Conclusion

Workplace joy isn't just a feeling, it's something we can measure, and something that moves with real, trackable patterns. It shifts by geography and it's closely tied to how well leaders can see what's happening on the ground. And it responds fast to two things almost every organization can already do: recognize people more and get benefits right.

Across 27 markets and nearly 27,000 people, one thing came up again and again: workers see their own experience more clearly than the averages HR leaders are often working from. That's not a failure on HR's part, but it does show what happens when leaders are under pressure to keep track of a workforce that's more spread out, more generationally mixed, and under more pressure than ever before.

The encouraging part is that none of these gaps are fixed in place. Close them, and the payoff will show up, in who stays, how productive people feel, and whether they'd recommend working there.





5 key takeaways

1 Growth markets are leading on joy, and culture may be part of why

The Global Workplace Joy Index averages 63 out of 100. Fast-growing markets like India, Mexico and Peru are near the top. Long-established economies across Anglo Cultures and Nordic & Germanic Europe sit closer to the middle, and Japan comes in at the bottom.

Some of that gap is about momentum and rising expectations. But it's worth noticing that the markets performing best in joy also tend to be more collectivist – places where people lean on colleagues and community as a matter of course, rather than more individualist ones, where work and identity are often more separate from the group around you. That doesn't mean individualist cultures can't build joyful workplaces. Connection and belonging show up as strong drivers of joy everywhere in this data. It just means some cultures may have a head start on the very thing this report keeps coming back to: joy is built through relationships and connection, not perks alone.

2 HR and workers see the same direction, but not always the same scale

On everyday joy (+1.0), advocacy (+1.5), engagement (29pp) and feedback quality (34pp), HR leaders get the direction right; they know when things are better or worse, they just tend to think things are going better than employees actually feel. That gap gets bigger as the average sample age increases, but gets smaller as seniority increases. In fact, among senior executives, workers report more joy than HR leaders expect. So, this isn't about HR needing a different mindset, it's about checking in more often and more closely, especially with the groups that are hardest to read from the top.

3 Low joy costs real money, not just morale

When people aren't feeling joyful and engaged at work, that shows up in whether they stay and how much they get done. Replacing just one non-executive employee costs an average of $5,475 in recruitment expenses, according to SHRM's 2025 benchmarking data. So, for a company of a thousand people, closing that retention gap could mean saving well over a million dollars a year in hiring costs alone. That's considering Gallup's estimate that disengagement costs the world economy trillions each year. These figures alone show that joy is much more than just a nice-to-have.

4 Recognition and benefits are the two easiest wins most companies are still missing

Consistent, effective recognition and a well-rounded benefits offering are where many companies are missing the mark. Give people more benefits and joy goes up – and that's a pattern that holds no matter what kind of benefit you're looking at. The same is true for recognition: just going from zero to one moment of recognition a month lifts how many people plan to stay from 73% to 86%, and how many feel more productive from 34% to 57%. Yet only 18% of workers get recognition from their manager at least three times a month, and benefits are similarly underused relative to their impact.

Both levers work the same way: small, consistent actions that compound over time rather than one-off gestures. Benefits need budget and planning behind them to reach people well. Recognition may require relatively lower investment but still needs a habit, and ideally a system, to make it consistent across every manager and team. Neither is fully optional anymore – they're two of the highest-leverage, most underused tools most organizations already have available to them.

5 HR might be looking at the wrong calendar

The big priorities for HR teams right now – upskilling, AI, pay, hiring – are all about where the business needs to be next year. None of them are really about how people feel today. That's not criticism, it's just where the pressure sits. But it might explain why the gaps in this report keep showing up: if most of HR's time goes toward planning for the future, there's less room left to notice what's happening right now. Closing that gap doesn't mean dropping those bigger priorities; it means making room for both planning ahead and checking in at the same time.



Appendix
Methodology

Research design and data collection
Data was gathered by our research partner, Opinium, using a 15-minute online survey. Respondents were recruited through an online research panel and the fieldwork was conducted between 6th–24th July 2026.

Target audience and criteria
The study surveyed adults aged 18 and older. The respondent categories were:

Workers
- Employees without HR decision-making responsibility, working for organizations with 50+ employees.
- Minimum of 50 participants within small (50–499), medium (500–1,999) and large (2,000+) organizations, where feasible (see list below for market breakdown).
- Natural fallout across industry, seniority, age, gender and region.

HR leaders
- HR and business decision makers in companies with 50+ employees, responsible or part of a team responsible for HR decisions.
- Minimum of 50 participants within small (50–499), medium (500–1,999) and large (2,000+) organizations, where feasible (see list below for market breakdown).
- Natural fallout across industry, age, gender and region.

Sample size and geography
The research covers a sample of 26,370 respondents across 27 markets:

- **UK:** 1,500 respondents (1,000 workers, 500 HR leaders).
- **Germany:** 1,300 respondents (1,000 workers, 300 HR leaders).
- **Italy:** 1,400 respondents (1,000 workers, 400 HR leaders).
- **France:** 1,400 respondents (1,000 workers, 400 HR leaders).
- **Spain:** 1,500 respondents (1,000 workers, 500 HR leaders).
- **USA:** 2,000 respondents (1,000 workers, 1,000 HR leaders).
- **Brazil:** 1,500 respondents (1,000 workers, 500 HR leaders).
- **India:** 1,500 respondents (1,000 workers, 500 HR leaders).
- **Japan:** 1,500 respondents (1,000 workers, 500 HR leaders).
- **Mexico:** 1,400 respondents (1,000 workers, 400 HR leaders).
- **Australia:** 1,350 respondents (1,000 workers, 350 HR leaders).
- **Poland:** 1,200 respondents (1,000 workers, 200 HR leaders).
- **Romania:** 1,050 respondents (750 workers, 300 HR leaders).
- **Greece:** 620 respondents (300 workers, 320 HR leaders).
- **Belgium:** 700 respondents (400 workers, 300 HR leaders).
- **Argentina:** 700 respondents (500 workers, 200 HR leaders).
- **Türkiye:** 750 respondents (500 workers, 250 HR leaders).
- **Austria, Bulgaria, Chile, Czechia, Finland, Peru, Portugal, Slovakia, Sweden, Uruguay:** 500 respondents each (300 workers, 200 HR leaders.

Index creation
The Joy Index is a composite score designed to measure how joyful workers feel in their day-to-day working lives, moving beyond single-item measures of satisfaction or engagement to capture a broader, more reliable picture of workplace experience.

Calculation
Ten metrics were used to construct the Joy Index:
Q1: How joyful, if at all, do you feel when working?
Q2: In a typical week at work, how often do you feel energized and enthusiastic?
Q3: In a typical week at work, how often do you feel proud of your work?

Q4: In a typical week at work, how often do you feel a sense of purpose and meaning?
Q5: In a typical week at work, how often do you feel connected to your colleagues?
Q6: In a typical week at work, how often do you feel valued and appreciated?
Q7: In a typical week at work, how often do you feel burnt out or exhausted? (inverse-scored)
Q8: In a typical week at work, how often do you feel frustrated or irritated? (inverse-scored)
Q9: How engaged, if at all, do you feel with your job and the business?
Q10: How likely, if at all, are you to recommend your organization as a place to work?

Each of the 10 metrics was converted to a score between 0 and 100. A straight average was then calculated across all 10 scores to produce a single Joy Index score per respondent, also on a 0–100 scale.

Categorization
Respondents were grouped into three bands based on their overall Joy Index score:

- **Low Joy:** 0 to 49
- **Medium Joy:** 50 to 74
- **High Joy:** 75 to 100

These cut points were fixed in advance rather than derived from the sample's distribution (i.e. they are not equal-sized tertiles), meaning the proportion of workers falling into each band can shift year-on-year as underlying sentiment changes. This also allows the Joy Index to be tracked longitudinally in future waves of this research.

Regional classifications

Regional groupings in this report are based on the GLOBE project (Global Leadership and Organizational Behavior Effectiveness), a large-scale cross-cultural study of 62 societies that grouped countries into 10 clusters based on shared cultural values, norms and beliefs, rather than purely geographic proximity. This clustering allows comparison across markets with similar cultural characteristics, rather than treating each of the 27 markets surveyed as fully independent data points.

- **Region 1:** Latin America – Argentina, Brazil, Chile, Mexico, Peru, Uruguay.
- **Region 2:** Anglo Cultures – Australia, UK, USA.
- **Region 3:** Southern Europe – France, Italy, Portugal, Spain, Greece, Türkiye.
- **Region 4:** Central & Eastern Europe – Bulgaria, Czechia, Poland, Romania, Slovakia.
- **Region 5:** Nordic & Germanic Europe – Austria, Belgium, Finland, Germany, Sweden.
- **Region 6:** South Asia – India.
- **Region 7:** East Asia – Japan.

Definitions used

Each region reflects broadly shared geographic proximity and cultural or economic similarity among the markets included, rather than a formal political or institutional grouping (such as EU membership). Regional assignments were applied consistently across all analyses in this report to allow regional comparisons of Joy Index scores, engagement, recognition and benefits data. Where a market's regional fit was ambiguous (for example, Türkiye, which sits at the geographic and cultural intersection of Southern Europe and the Middle East), it was assigned based on closest alignment with observed Joy Index and engagement patterns in this study.

"Senior executives" refers to participants in the worker survey who self-identified as "Executive/Business unit manager" when asked to describe their role seniority. This is a self-defined classification based on how respondents characterized their own position, rather than a standardized title or verified organizational level, so definitions of "senior executive" may vary by respondent and by market.



About Edenred

Edenred is the global leader in Benefits & Engagement and Mobility.

With more than 1 million client companies across 44 countries, Edenred's platform gives more than 60 million users access to the services and products of more than 2 million partner merchants.

Edenred offers digital solutions dedicated to employees (meal vouchers, commuting, gift cards, wellness, rewards, and preferential offers), fleet managers (multi-energy solutions including EV charging, maintenance services, VAT refund services, tolls, and parking), and corporate payments (virtual cards).

Guided by Edenred's purpose, "Enrich connections. For good.", these solutions enhance employees' wellbeing and purchasing power and simplify the lives of professional drivers. They promote access to healthier food, more environmentally friendly products, and more sustainable mobility. Finally, they improve the attractiveness and efficiency of businesses while vitalizing the employment market and local economies.

Edenred's 12,000 employees are committed to making the world of work a connected ecosystem that is safer, more efficient and more responsible every day.

Our benefits and engagement solutions

HR and business leaders face mounting challenges in bridging the gap between business needs and employee expectations.

At Edenred, we help HR and business leaders like you bridge the expectation gap and create work environments where employees – and businesses – can flourish.

As global pioneers in benefits and engagement solutions for over fifty years, we've built a seamless all-in-one platform that redefines the employee experience. By offering tailored benefits, meaningful rewards and recognition and holistic wellbeing support, we deliver the refreshing daily lifts that make work and life more enjoyable for your employees.

With Edenred, you can:

- **Attract and retain top talent in a competitive market.**
- **Boost engagement, motivation and loyalty across your workforce.**
- **Build a healthier, more productive and more joyful workplace.**

It's time to transform your employee engagement, elevate business performance and create a thriving workplace fueled by joie de vivre.

Together, let's make work more rewarding, uplifting, and successful – for everyone.

Let's power up your joie de vivre.


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