

Great
Place
To
Work®

European Workforce Study 2025

Time for High-Trust Leadership

Inside →

1

Workforce culture drives productivity in a divided Europe

2

Leadership quality is a key differentiator

3

Differences in workforce effectiveness are amplified by key challenges

4

Effective leadership is built on trust, proximity skills and psychological safety

Welcome to the first edition of the **European Workforce Study**, a comprehensive exploration of workforce culture and leadership across Europe.

In this annual report, we delve into the vital role that workforce culture and effective leadership play in shaping productivity, innovation, and competitiveness, offering insight based on one of the largest pan-European surveys ever conducted on this subject.

Our goal is to equip policymakers, business leaders, and stakeholders with critical insights to navigate today's complex landscape and harness the full potential of their people.

Contents

Introduction.....	3
Methodology.....	4
Glossary.....	5
CHAPTER 01	
Workforce culture drives productivity in a divided Europe.....	6
CHAPTER 02	
Leadership quality is the key differentiator of workforce effectiveness.....	13
CHAPTER 03	
Differences in workforce effectiveness are amplified by challenges posed by employee retention, AI, ESG and hybrid work.....	23
CHAPTER 04	
Effective leadership is built on trust, proximity skills and psychological safety.....	40
APPENDIX 01	
Country indicators.....	55

Introduction

Europe is at cross-roads, facing disruptions and significant challenges threatening its security, prosperity, and welfare models. The challenges are multifaceted and systemic, with drivers including geopolitical shifts, climate change, energy transition, disruptive technologies, political and social fragmentation.

Resilience and self-reliance are therefore at the forefront of all agendas. European policymakers and business leaders recognise the need for creating a level playing field and closer collaboration to navigate the uncertainties, foster innovation, competitiveness and, productivity.

In this context, it is paradoxical that the effects of workforce culture and leadership still remain largely unscrutinised. Ever more so, we live in a time where the employee, both as an individual and as part of a team, is more empowered than ever to influence

productivity and results – supported by new technologies and new ways of working.

Thus, it has never been more important to understand the effects of workforce culture and leadership on performance and productivity. Nor has it ever been more crucial to understand the workforce potential as an asset or liability in the chase for competitiveness, innovation, change, and resilience.

We are therefore pleased to introduce Great Place To Work's first annual European Workforce Study. The report covers the quality of workforce culture and leadership in Europe.

Based on the most comprehensive pan-European survey on this subject to date, we hope the study will contribute to filling knowledge gaps in how to foster productivity and competitiveness in Europe more effectively.

Presenting only high-level extracts

from the survey, the report reveals some extraordinary findings – showing a divided Europe with a huge untapped potential.

Specifically, and for the first time on a pan-European level, the study examines:

- A relationship between workforce culture and national productivity (BNP)
- Leadership quality as the key factor driving workforce culture
- The drivers of leadership effectiveness

The strength of the study's conclusions is further underscored by Great Place To Work's more than 30 years of data, assessing the quality of culture and leadership in tens of thousands of workplaces across Europe. This wealth of data enables the use of "European Best Workplaces" as a benchmark for the potential that can be realised.

More research is needed, and this report will be followed up by both topical and country-specific analyses.

However, one conclusion remains clear: the direct impact of workforce culture and leadership quality on performance is undeniable. It's time to act on the findings, at both macro and micro levels. The insight presented in this report should engage policymakers, business leaders, and anyone focused on enhancing competitiveness and productivity in these turbulent times.

On behalf of
Great Place To Work Europe

Tron Kleivane
Project lead, European Workforce Study

Methodology

Annual online quantitative survey

Fieldwork conducted in summer 2024

The survey included 80 Likert scale statements. 60 of the statements covered workplace culture and leadership, matching Great Place to Work's Trust Index® statements, and 20 statements covered specific workplace challenges, such as ESG, AI and hybrid work.

Throughout the report, some statements have been shortened for readability.

Multiple regression was used to quantify relationships between different variables to identify key relationships and drivers of business outcomes.

Great Place To Work metrics are grass-roots indicators, reflecting the perception of employees in Europe.

24,938

Employees

19

Countries

Austria	France	Luxembourg	Spain
Belgium	Germany	Netherlands	Sweden
Cyprus	Greece	Norway	Switzerland
Denmark	Ireland	Poland	UK
Finland	Italy	Portugal	

1,500

Respondents per country¹

¹ Smaller samples in Austria (500), Finland (500), Luxembourg (1,000), Spain (900) and Poland (700)

Glossary

AI: organisations that are AI business ready are those where employees agree with “My organisation is making investments in using AI tools”.

European Best Workplaces is a blended benchmark combining data from 2024’s Fortune’s 100 Best Companies To Work For™ in Europe List makers (organisations with 500+ employees) and the 100 Best Small & Medium Workplaces in Europe™ List makers (50–499 employees).

European Best Workplaces – Demographic View is a sub-category of European Best Workplaces benchmark including demographic data and stemming from the aggregate of six National Best Workplaces Lists most representative of the European landscape and range of company sizes. The six countries are: Norway, Netherlands, Germany, UK, France and Italy.

Employee satisfaction is measured by the percentage agreement with the statement “Taking everything into account, I would say this is a great place to work”.

Employee satisfaction ratio is a ratio of satisfaction among all employees to senior leaders. The lower the ratio, the further away senior leaders are from employees

ESG: organisations with successful ESG efforts are those where employees agree with “My organisation’s business decisions meaningfully improve the environment, society or human well-being”.

High-trust leadership definition is based on 41 statements, which measure leadership credibility and whether employees feel respected and treated fairly.

Hybrid work is a flexible approach that combines working in an office/on-site environment and working from home.

Multiple linear regression (MLR) is a statistical technique that uses several explanatory variables to predict the outcome of a response variable. The technique is used to perform driver analysis.

PP is an abbreviation of “percentage points”, which is a unit of measurement for the difference between two percentages.

Proximity leadership is a fundamental skill. When leaders develop the ability to get proximate, they leverage empathy, curiosity and authenticity and integrate them into their leadership skill set. In this report proximity leadership skills are defined by 11 statements.

Proximity gap is a ratio of the average perception of proximity leadership skills among senior leaders to the average perception among employees. It’s calculated by dividing the average percentage agreement to the 11 proximity

leadership statements among senior leaders by the average percentage agreement among the employees. The lower the ratio, the smaller the proximity gap.

Psychologically safe workplaces are those where employees agree with the statement “This is a psychologically and emotionally healthy place to work”.

CHAPTER 01

Workforce culture drives productivity in a divided Europe

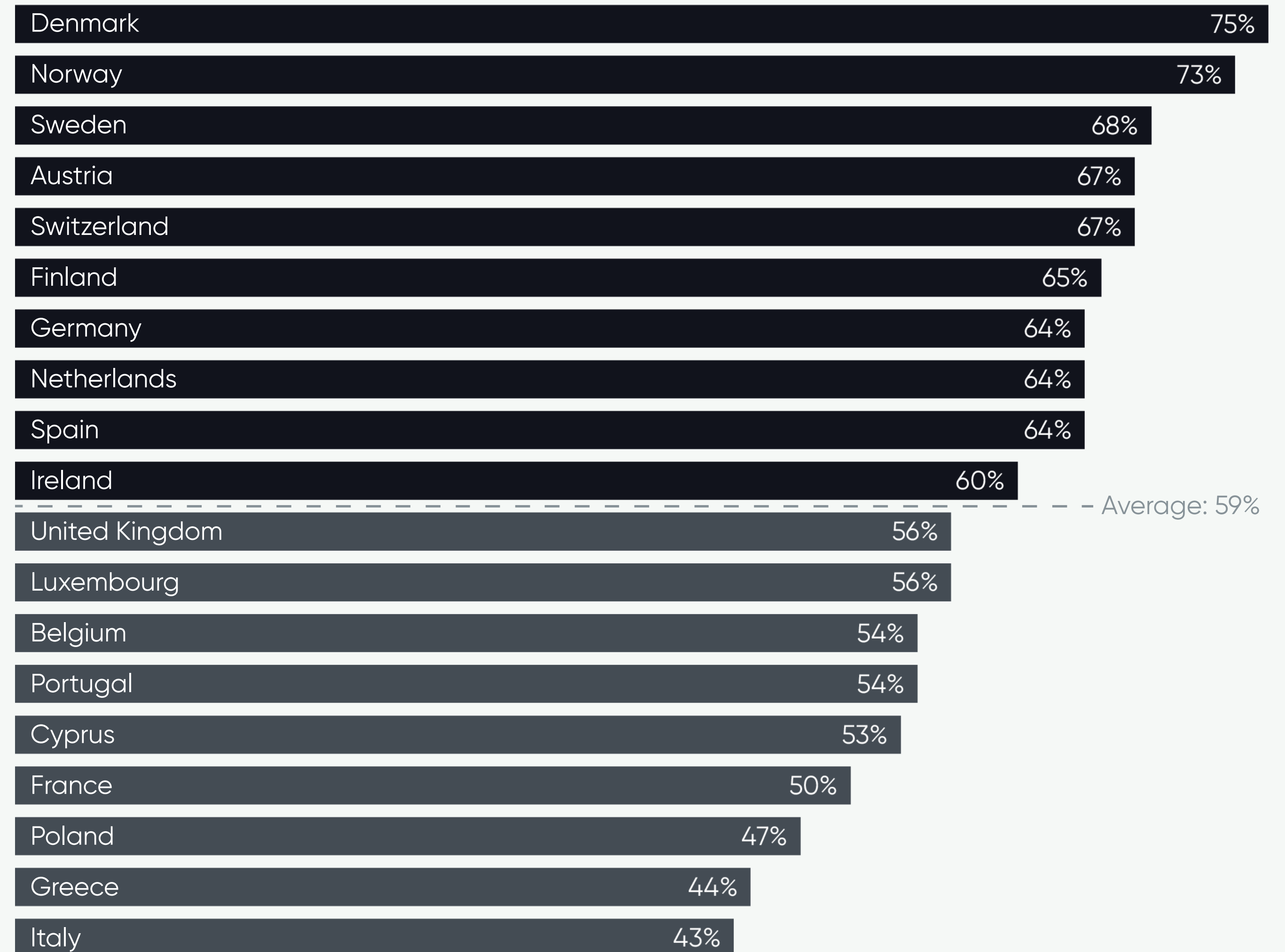
Europe's workforce shows huge differences in satisfaction

Southern European countries and Poland lag behind

INSIGHT

In most South European countries and Poland, only 1 in 2 employees or fewer consider their organisation a great place to work.

% of the workforce that agrees with:
"Taking everything into account, I would say this is a great place to work"



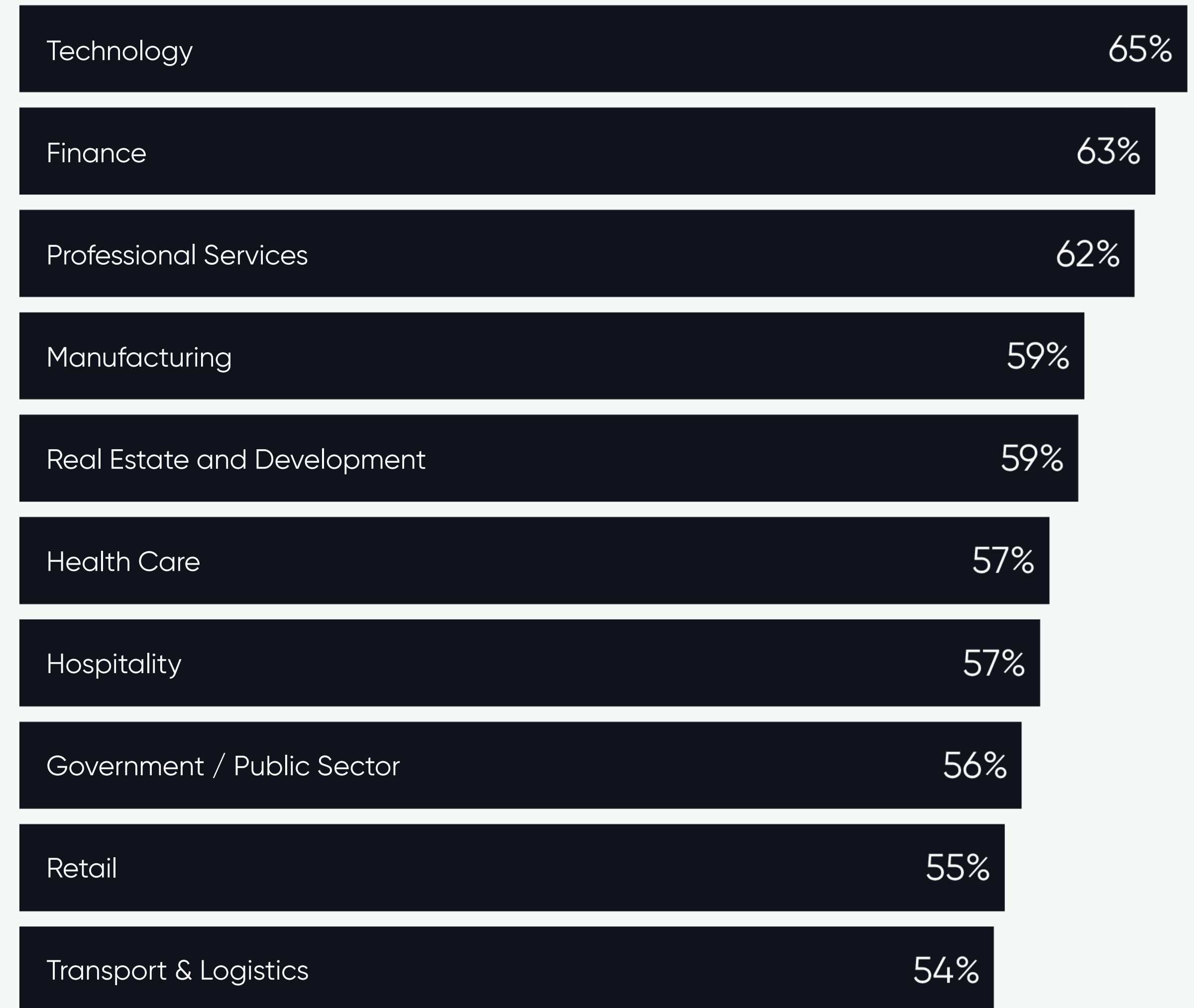
Employees in industries with high-demand skills have higher workplace satisfaction

Skilled workers feel more engaged in tech, finance, and professional services

! INSIGHT

When it comes to healthcare, there is a disconnect between the demand for skills and employee satisfaction. This is due to healthcare in Europe being part of the public sector, where employees are less satisfied.

% of the workforce that agrees with:
"Taking everything into account, I would say this is a great place to work"



A large part of Europe's workforce feels undervalued

Low appreciation from management drives dissatisfaction

INSIGHT

Most lowest scoring statements indicate that European employees are feeling not valued, not included and taken for granted.

% agree

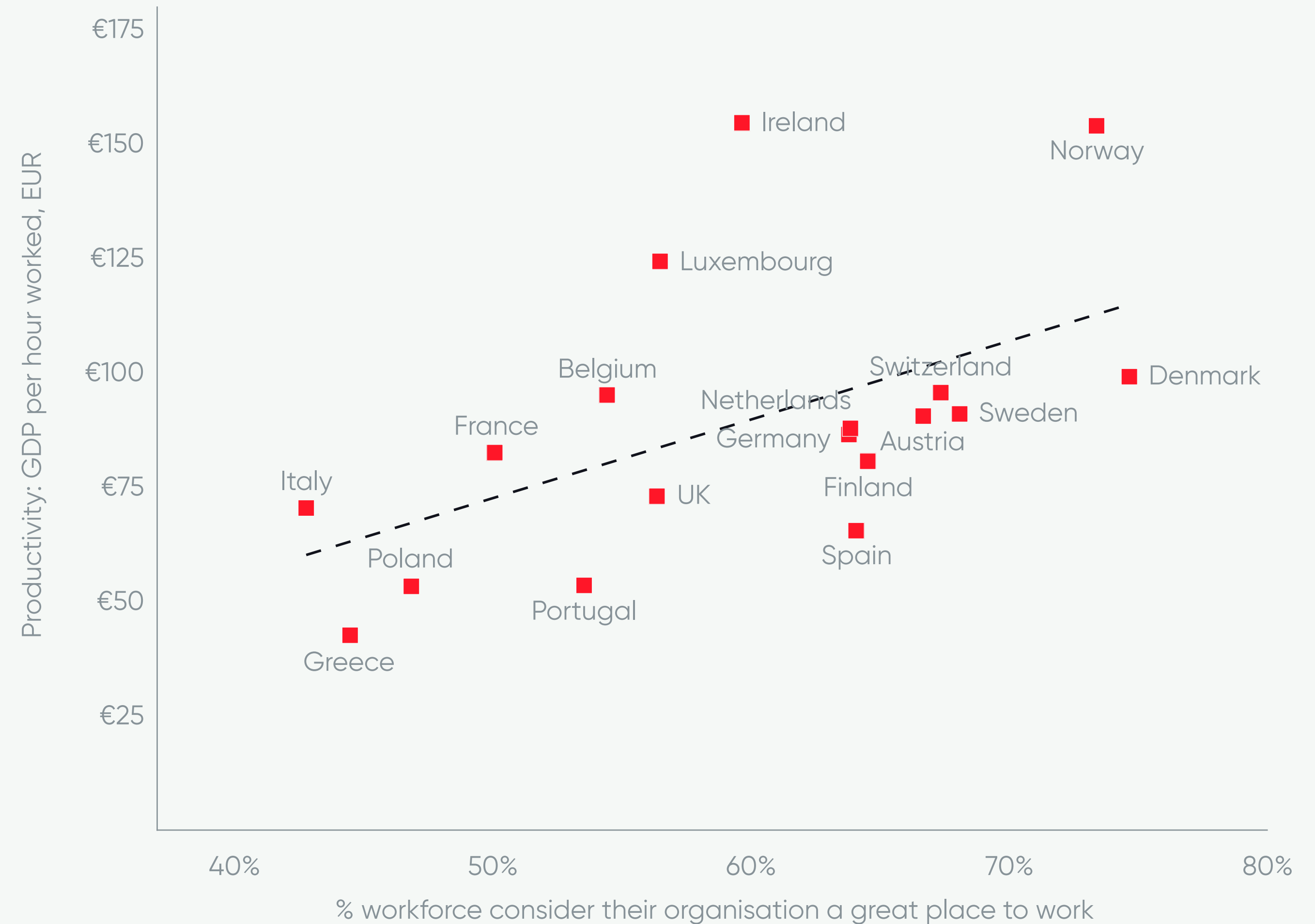
Lowest ranking statements on management and culture



Workforce satisfaction directly impacts productivity

Countries with engaged workforces see higher labour productivity

Labour productivity, expressed as GDP per hour worked¹ vs. % agree with "Taking everything into account, I would say this is a great place to work"



¹ Source: OECD

Five drivers of workforce culture reveal significant differences

But all countries fall short on leadership alignment with values and addressing fair compensation

⚙️ METHODOLOGY

Using multiple regression, we have identified top five drivers (out of 60 that we've measured) of employee satisfaction: there is a vast difference in the scores for most of these drivers between the top and bottom scoring countries.

Top scoring countries: Netherlands, Denmark, Norway, Finland, Switzerland, Sweden.

Bottom scoring countries: Poland, Portugal, France, Greece, Italy.

Top five drivers of employee satisfaction Spread between the top and bottom scoring countries

% agree with the drivers:



A divided Europe shows productivity gaps driven by workforce culture

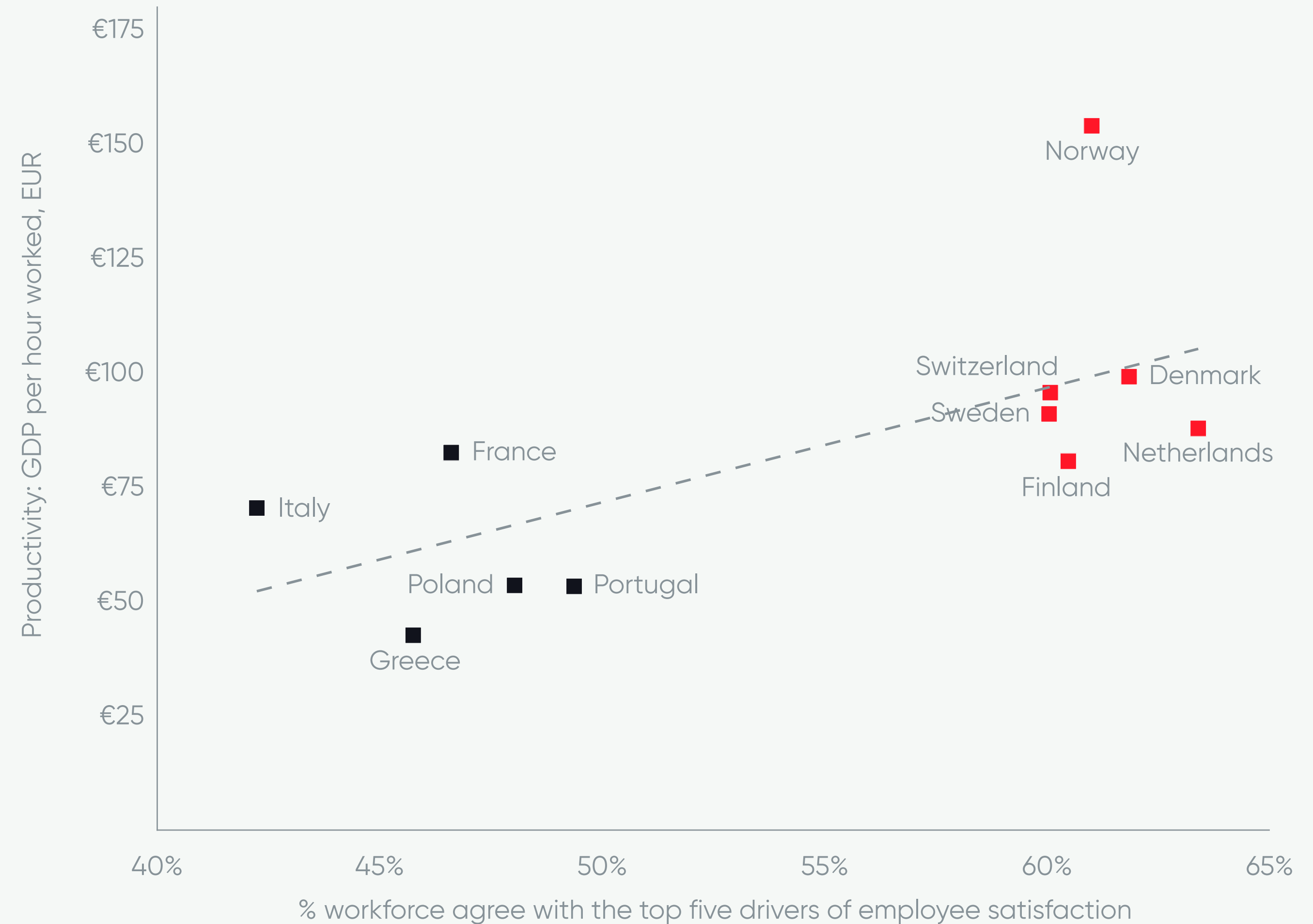
Top-scoring countries demonstrate stronger productivity linked to better workforce culture

EXPLAINER

The top five drivers of employee satisfaction are being treated with respect, work-life balance, psychological safety, leaders living their values, and fair pay.

Labour productivity, expressed as GDP per hour worked¹ vs. average % agree with top five drivers of employee satisfaction

Top and bottom scoring countries



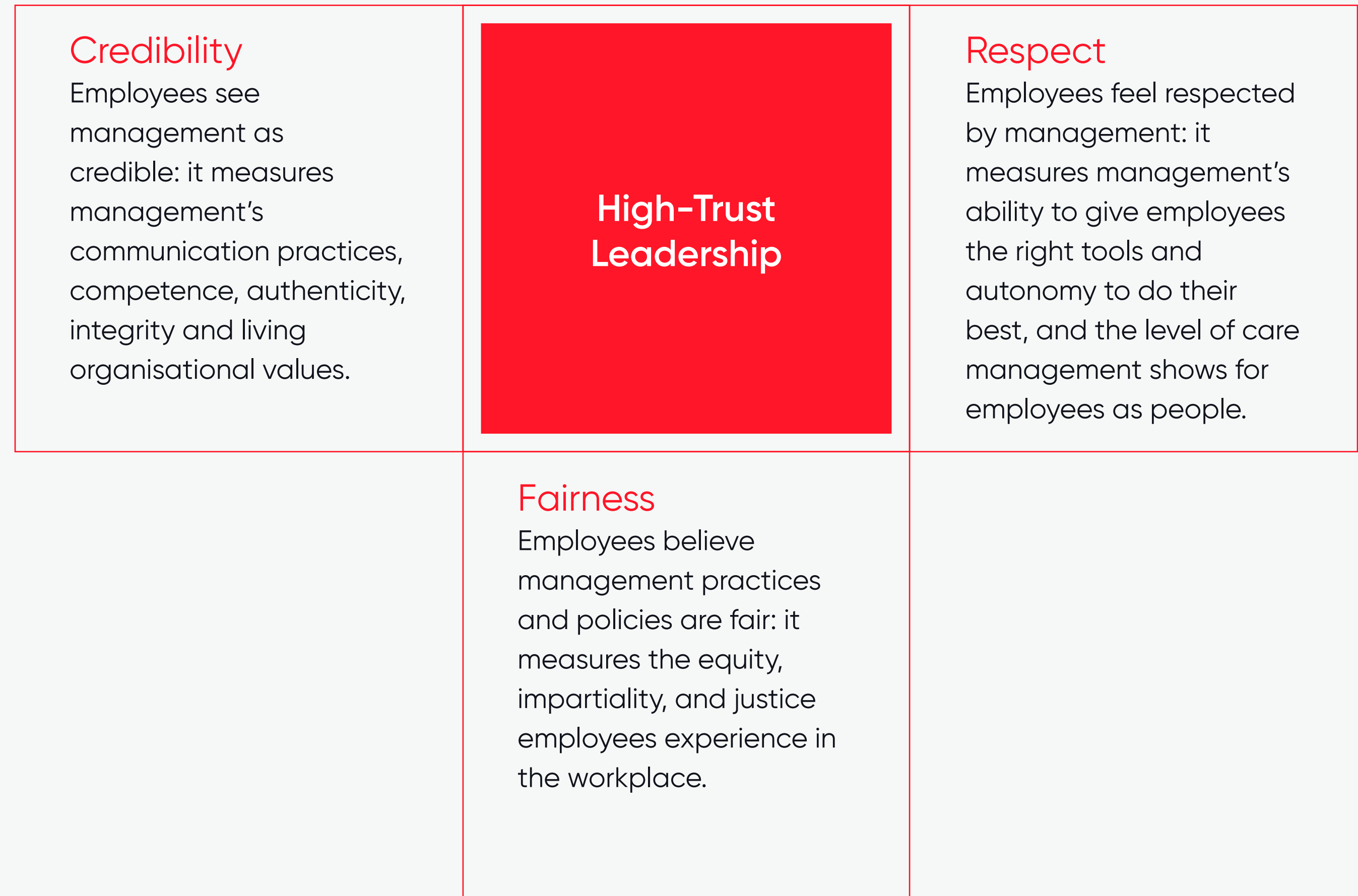
¹ Source: OECD

CHAPTER 02

Leadership
quality is the
key differentiator
of workforce
effectiveness

What is high-trust leadership?

Great Place To Work utilises a framework of leadership qualities that affect business outcomes. These leadership qualities form three dimensions.



Leadership quality varies significantly across Europe

In France, Poland, Luxembourg, Greece and Italy fewer than 1 in 2 employees experience high-trust leadership

EXPLAINER

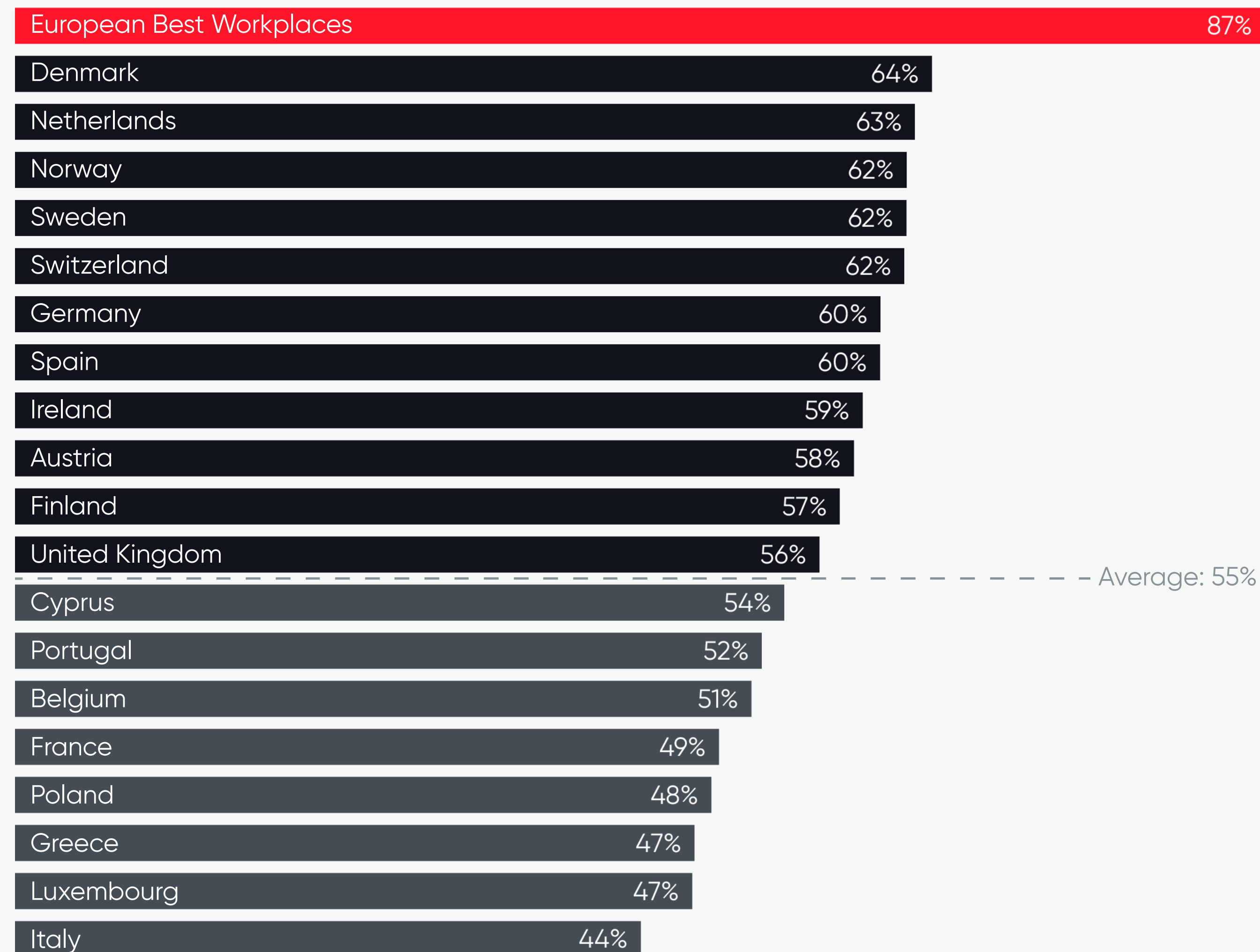
“European Best Workplaces” is a blended benchmark combining data from 2024’s Fortune’s 100 Best Companies To Work For™ in Europe List makers (organisations with 500+ employees) and the 100 Best Small & Medium Workplaces in Europe™ List makers (50–499 employees).

METHODOLOGY

High-trust leadership definition is based on 41 statements, which measure leadership **credibility** and whether employees feel **respected** and **treated fairly**.

High-trust leadership by country

% of the workforce that agree to the relevant statements



The tech sector leads in high-trust leadership

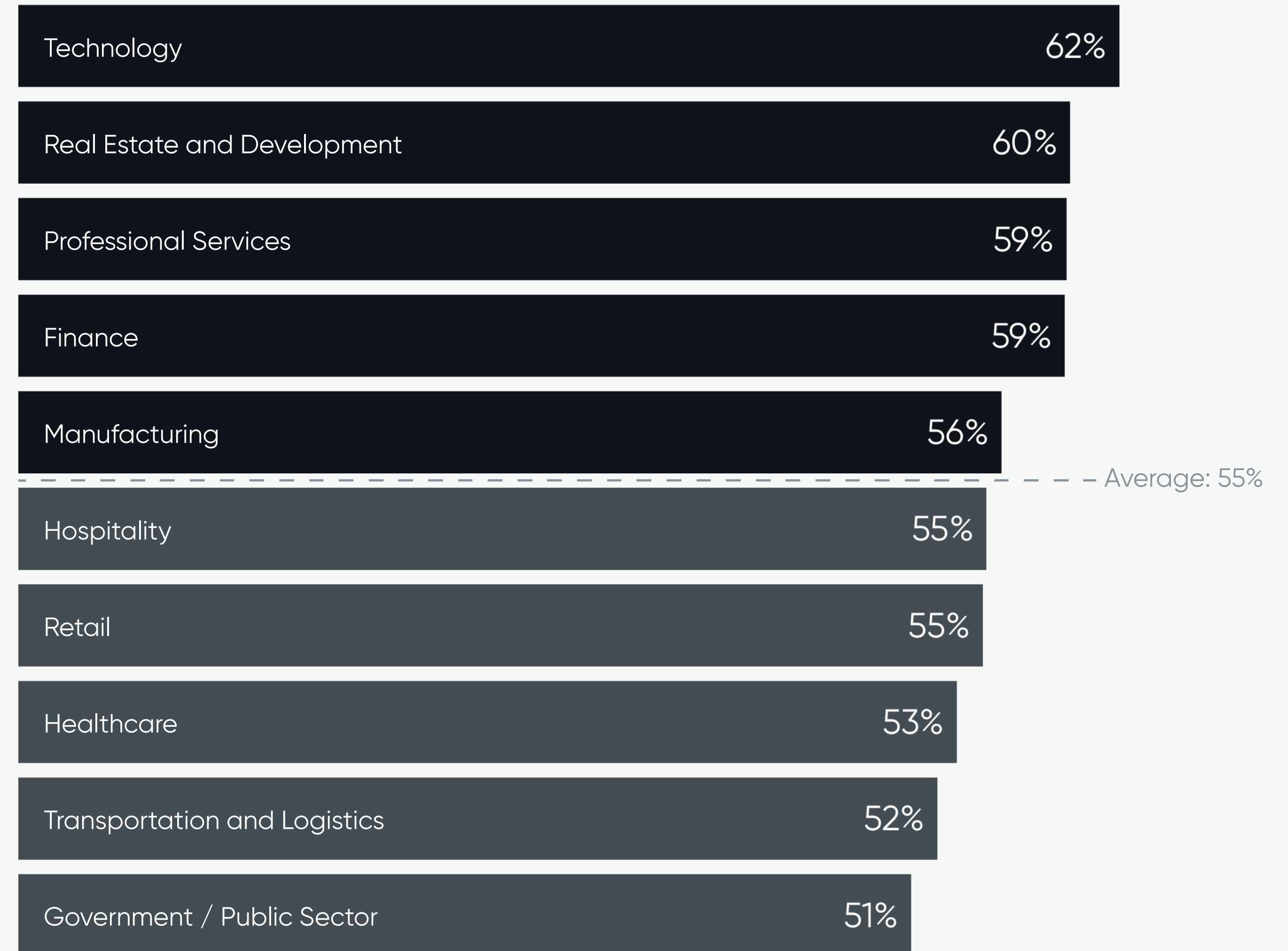
While the public sector lags behind

⚙️ METHODOLOGY

High-trust leadership definition is based on 41 statements, which measure leadership **credibility** and whether employees feel **respected** and **treated fairly**.

High-trust leadership by industry

% of the workforce that agree to the relevant statements



Leadership quality has a profound impact on performance

Employee satisfaction and retention skyrocket when leaders are trusted

⚙️ METHODOLOGY

High-trust leadership is present when on average people score their organisations 4 or 5 out of 5 on 41 constituent statements.

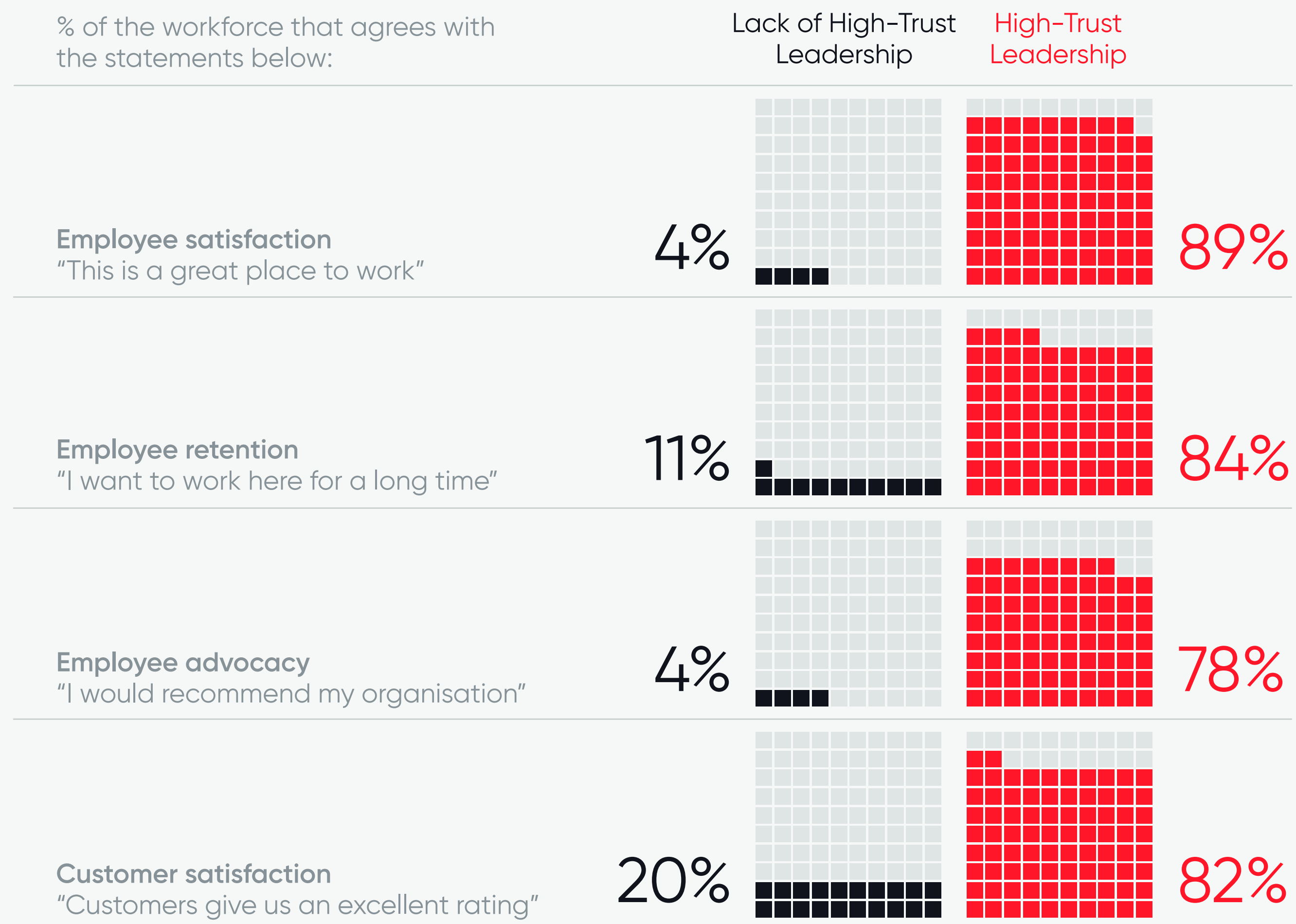
There's a lack of high-trust leadership when the average scores are 1 or 2 out of 5.

💡 INSIGHT

Only 4% of employees feel satisfied with their organisations where there's a lack of high-trust leadership. This is compared to 89% employee satisfaction in organisations with high-trust leadership.

Comparison between those who work in an organisation with high-trust leadership vs. those who don't

% of the workforce that agrees with the statements below:



Best European organisations vastly outperform the rest

High-trust leadership drives business outcomes, including customer satisfaction

EXPLAINER

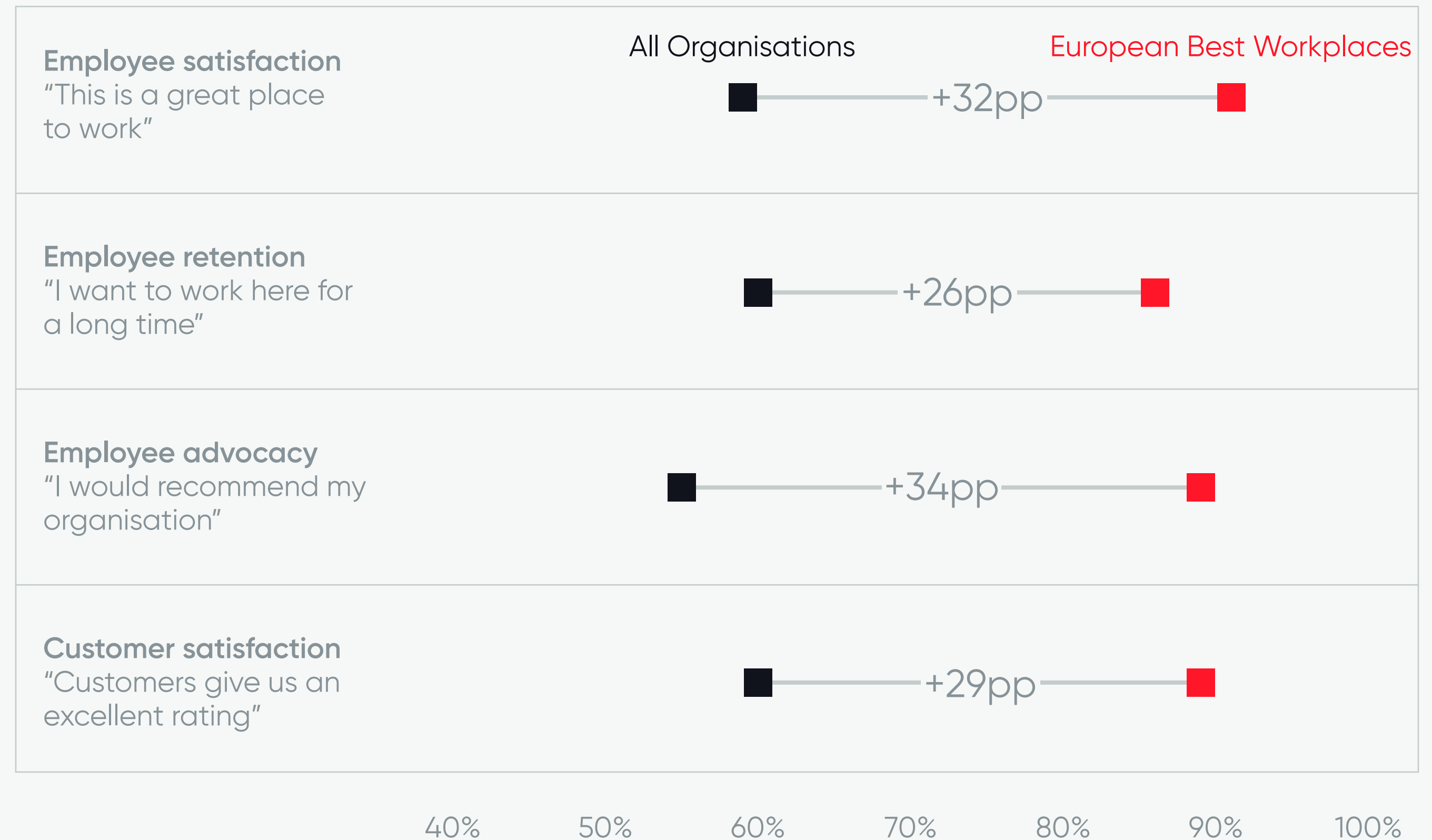
“European Best Workplaces” is a blended benchmark combining data from 2024’s Fortune’s 100 Best Companies To Work For™ in Europe List makers (organisations with 500+ employees) and the 100 Best Small & Medium Workplaces in Europe™ List makers (50–499 employees).

INSIGHT

Good leadership results in high customer satisfaction. Best Organisations lead on customer satisfaction by 27 percentage points.

Comparison between average European employee experience vs. European Best Workplaces

% of the workforce that agrees with the statements below:



Leaders are out of touch with the workforce in most countries

Leaders overestimate how well their organisations are doing

⚙️ METHODOLOGY

Employee satisfaction ratio is a ratio of satisfaction among all employees to senior leaders. The lower the ratio, the further away senior leaders are from employees.

💡 INSIGHT

Leaders in most countries are significantly over-estimating their organisations as being great places to work. For example, in Austria 100% of senior leaders agree to “Taking everything into account, I would say this is a great place to work” vs. 66% of employees and managers, resulting in a ratio of 0.7.

Employee satisfaction ratio: % agree with “Taking everything into account, I would say this is a great place to work”, all employees to senior leaders.
The lower the ratio the more out of touch the leaders are.



Leaders' blind spots are widening the disconnect

Misalignment between leaders and employees exists in most countries

EXPLAINER

European Best Workplaces – Demographic View is a sub-category of European Best Workplaces benchmark, that includes seniority level data and is the aggregate of six¹ National Best Workplaces Lists most representative of the European landscape and range of company sizes.

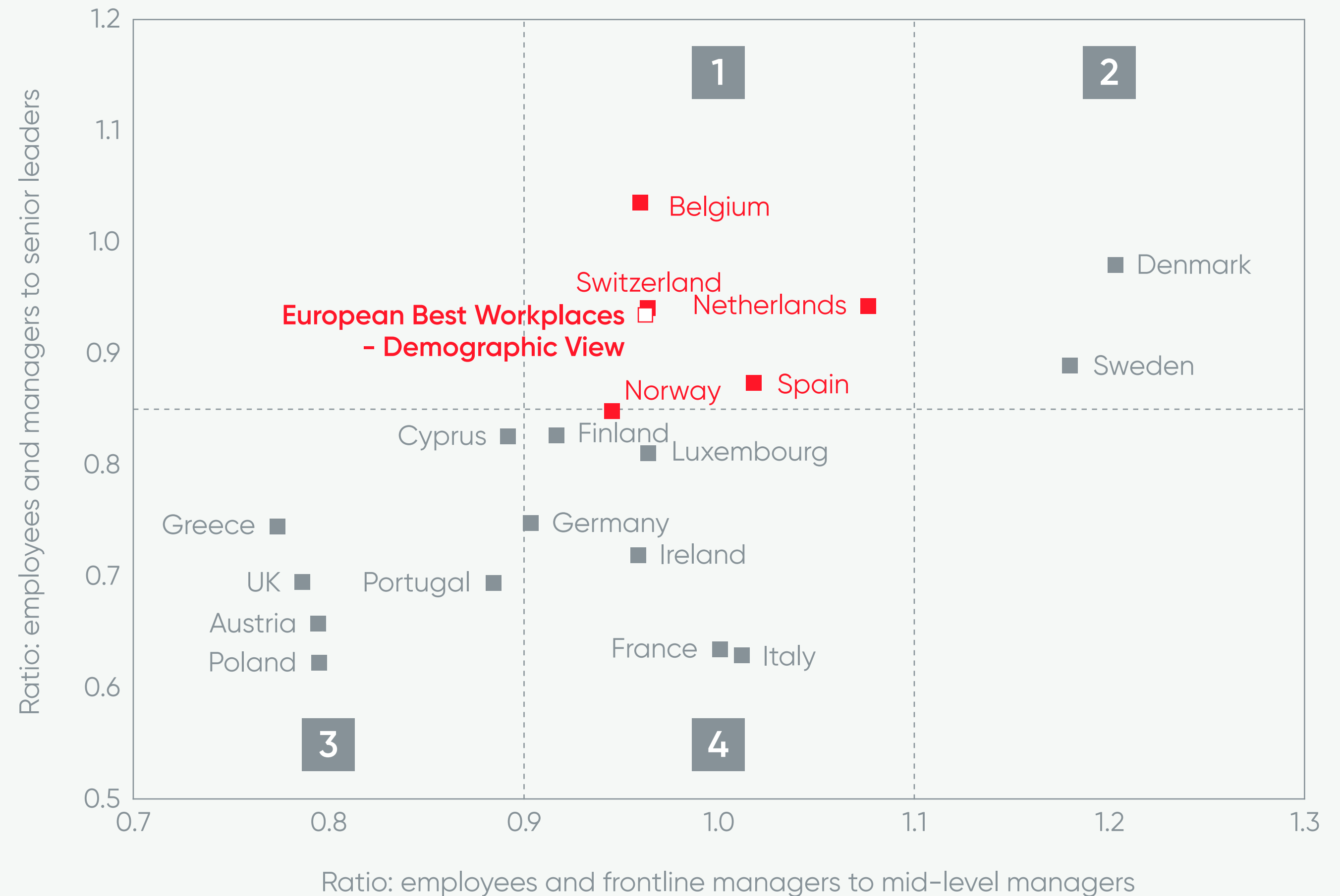
1 Leaders are in-touch with employees at all levels

2 Employees and frontline managers feel happy, but mid-level managers don't feel supported

3 Leaders and mid-level managers are out of touch

4 Leaders are out of touch, but mid-level managers are trying to keep things afloat

Employee satisfaction ratios: agreement to "Taking everything into account, I would say this is a great place to work"



¹ The six countries included are: Norway, Netherlands, Germany, UK, France and Italy.

Mid-level managers, holding the key to workforce satisfaction, feel unsupported

Lack of support leads to frustration around work-life balance and autonomy

! INSIGHT

In European Best Workplaces the gap in high-trust leadership perceptions between senior leaders and mid-level managers is low. The overall level of trust is significantly higher.

! INSIGHT

Mid-level managers feel lack of support around work-life balance, change fatigue and autonomy.

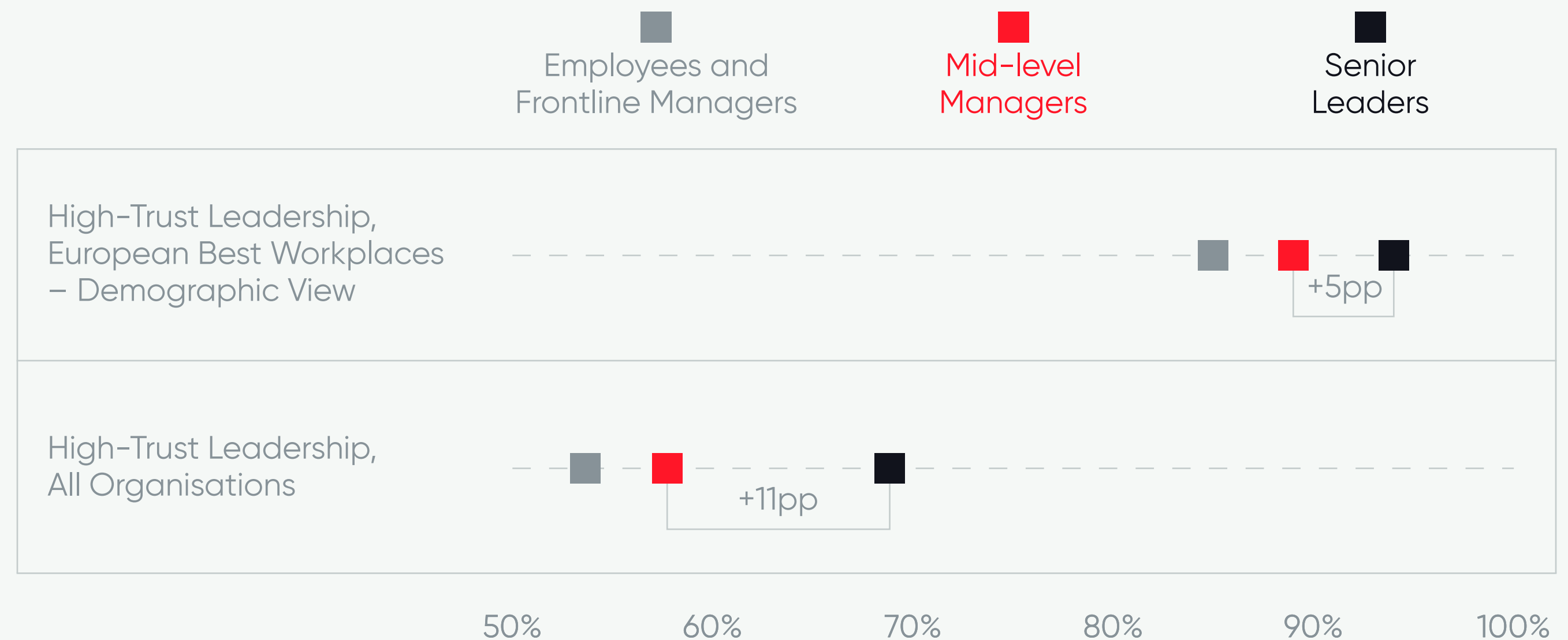
📖 EXPLAINER

European Best Workplaces – Demographic View is a sub-category of European Best Workplaces benchmark, that includes seniority level data and is the aggregate of six¹ National Best Workplaces Lists most representative of the European landscape and range of company sizes.

¹ The six countries included are: Norway, Netherlands, Germany, UK, France and Italy.

High-trust leadership by seniority

% that agree to the relevant statements



Best European organisations are governed by high-trust leadership

Credibility, respect, and fairness drive high-trust leadership

EXPLAINER

“European Best Workplaces” is a blended benchmark combining data from 2024’s Fortune’s 100 Best Companies To Work For™ in Europe List makers (organisations with 500+ employees) and the 100 Best Small & Medium Workplaces in Europe™ List makers (50–499 employees).

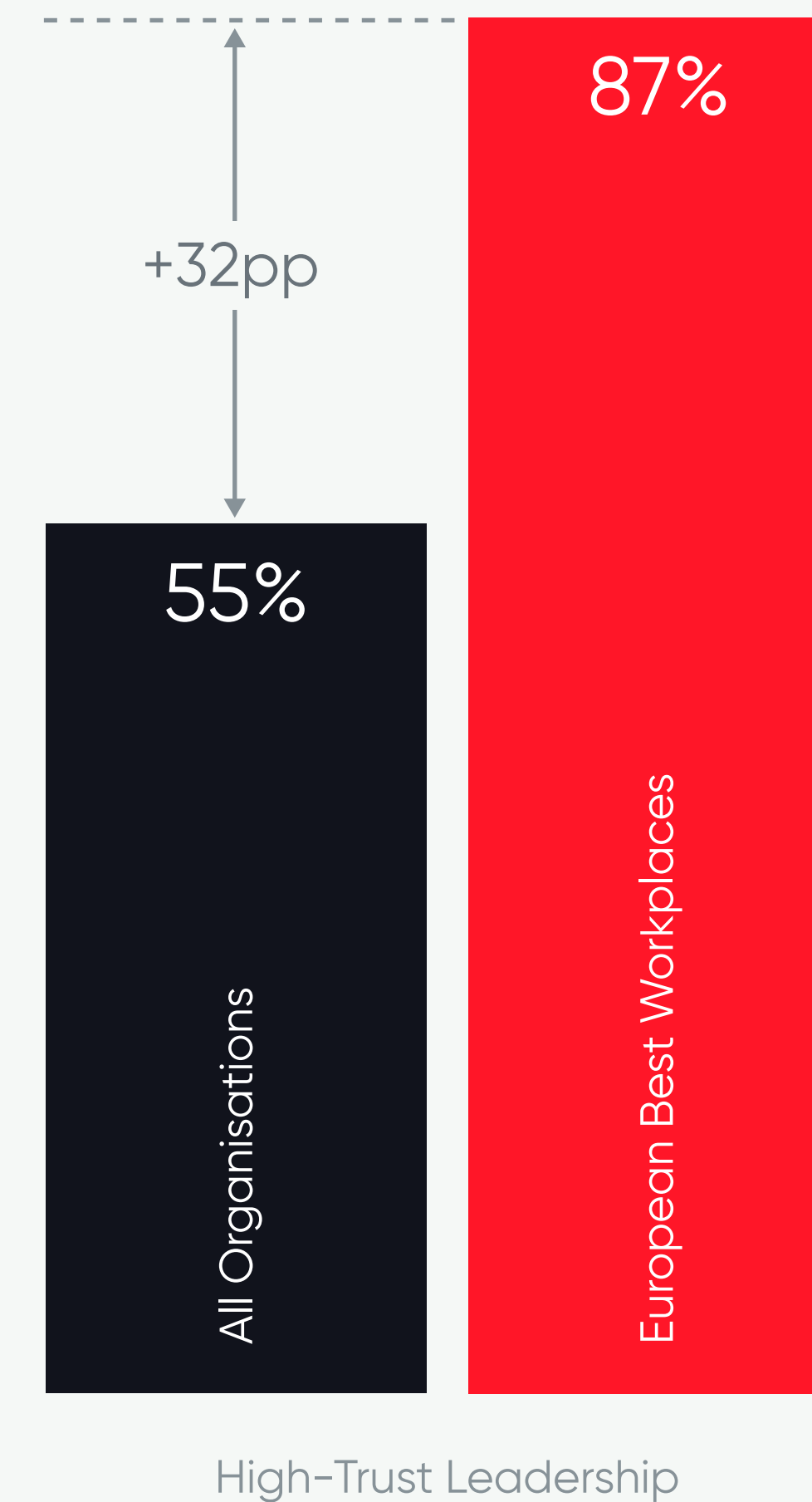
METHODOLOGY

High-trust leadership definition is based on 41 statements, which measure leadership **credibility** and whether employees feel **respected** and **treated fairly**.

INSIGHT

European Best Workplaces outperform all organisations on high-trust leadership by 32pp. They perform consistently higher on all the components of high-trust leadership.

Comparison between all European organisations
vs. European Best Workplaces
% of the workforce that agrees with the relevant statements



CHAPTER 03

Differences in workforce effectiveness are amplified by challenges posed by employee retention, AI, ESG and hybrid work

RETENTION

Employee retention is a real issue, especially for younger workers

Younger employees are more likely to seek new opportunities

⚙️ METHODOLOGY

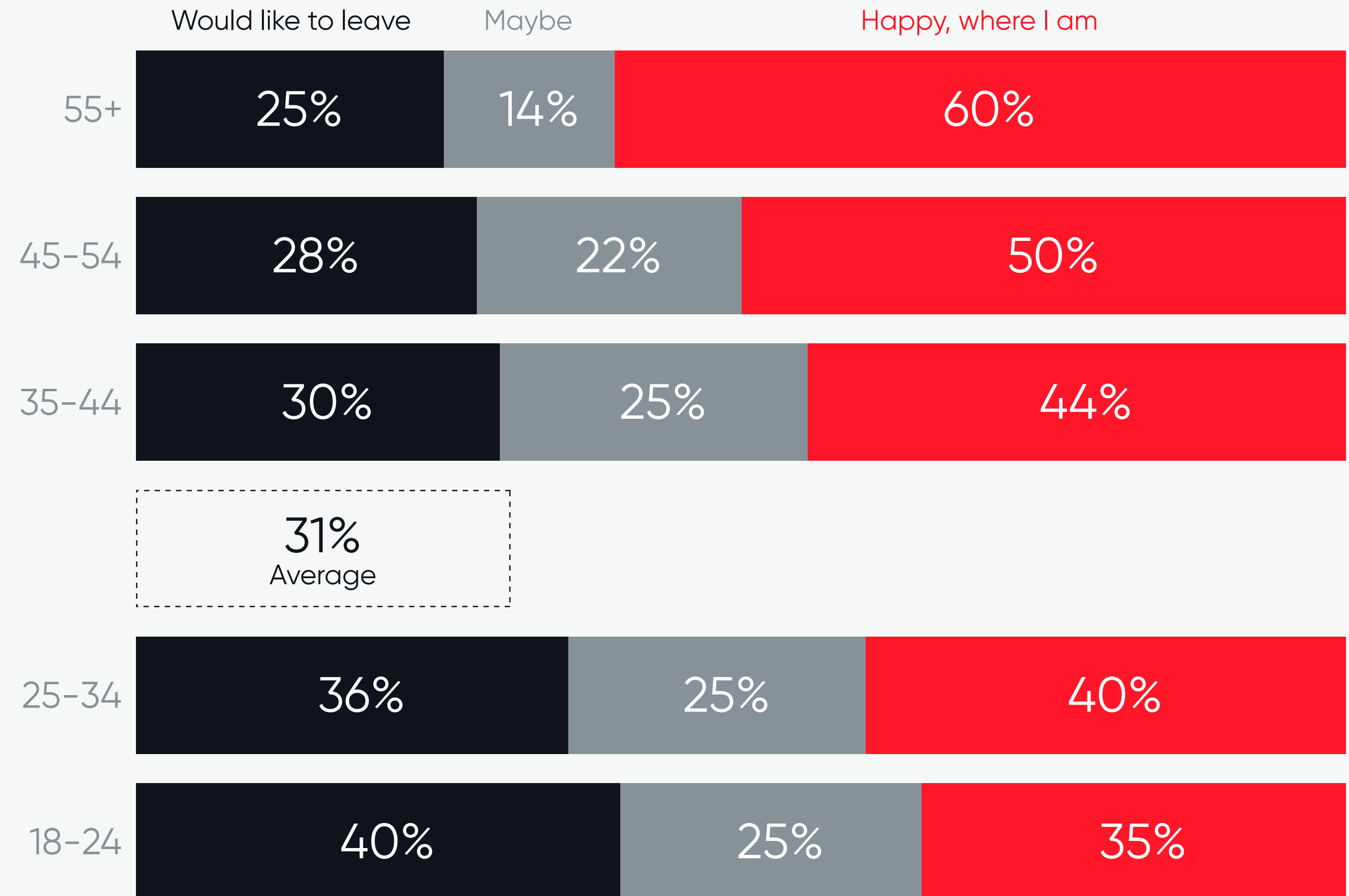
The figures are shown for employees and frontline managers, in order not to conflate age with seniority. Younger employees are more likely to want to leave than older employees at the same seniority level.

💡 INSIGHT

Younger employees have higher expectations of their leaders and are more likely to leave if those expectations are not met.

“Will you be looking for a new job this year?”

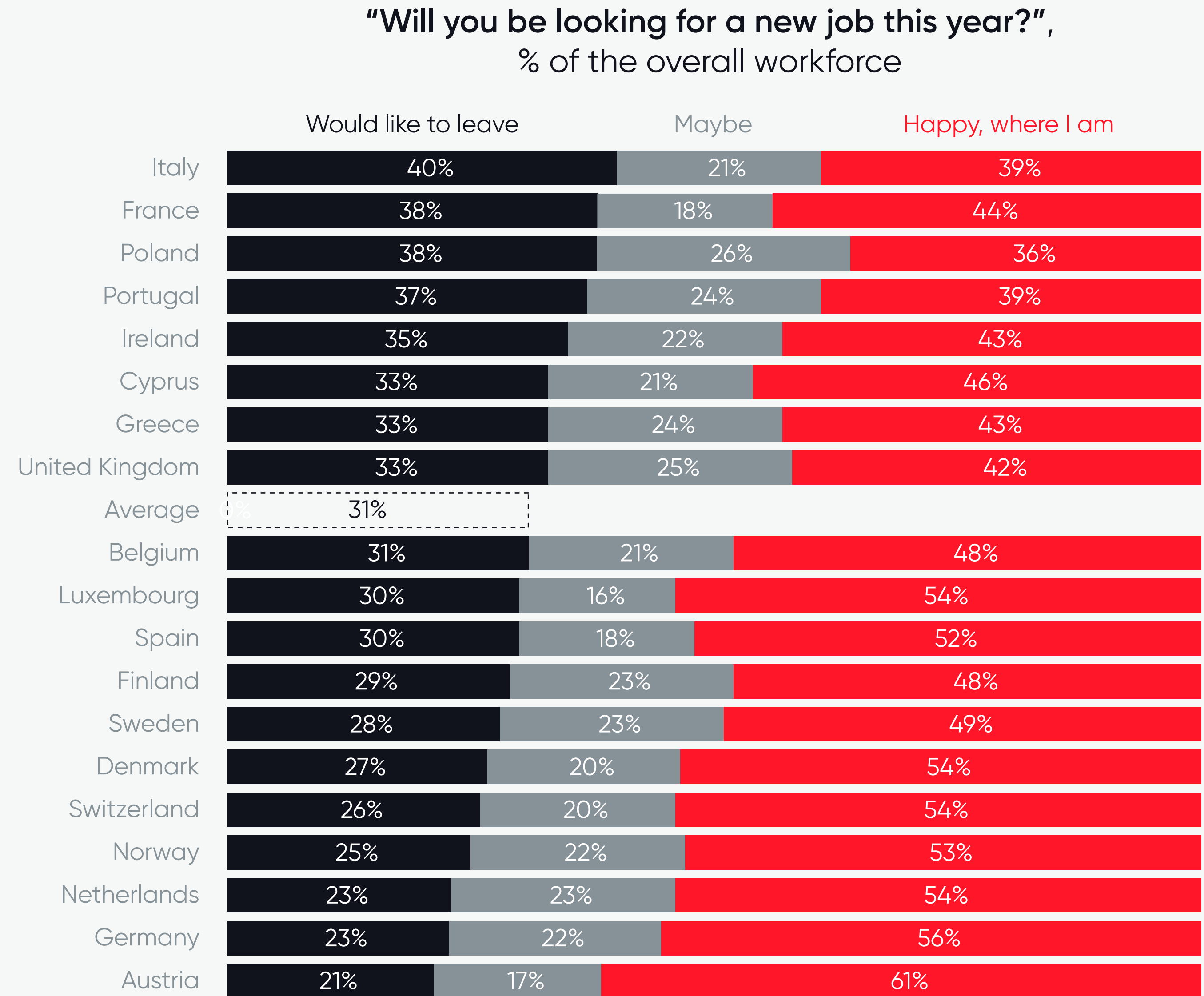
Employees and frontline managers



RETENTION

Employee retention is challenging in most countries

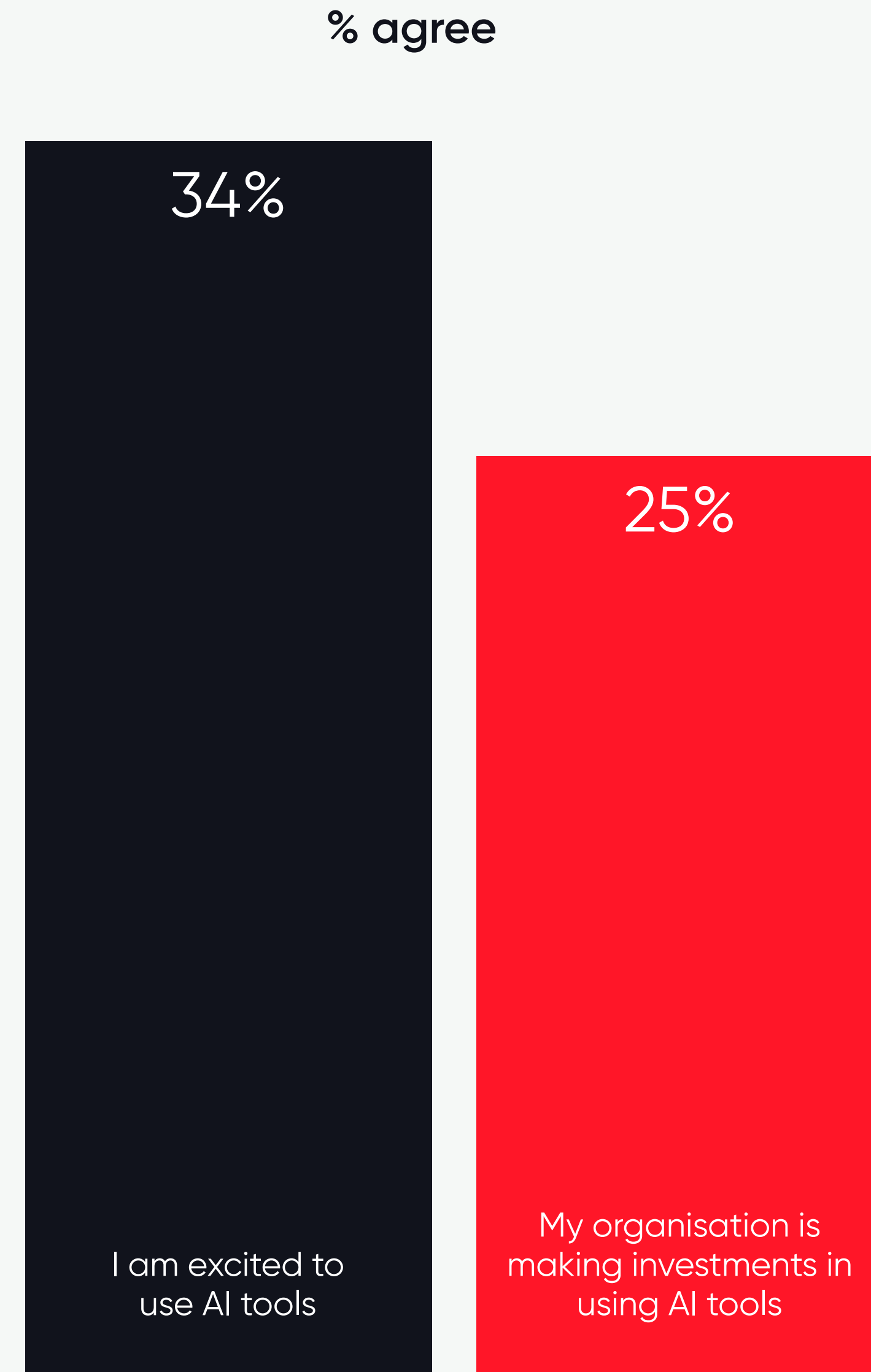
But Southern European countries and the UK have higher retention problems



AI

Artificial intelligence is gaining momentum, but organisations are unprepared

Only 1 in 4 European organisations are investing in AI tools



AI

There's a seniority-based information gap around AI

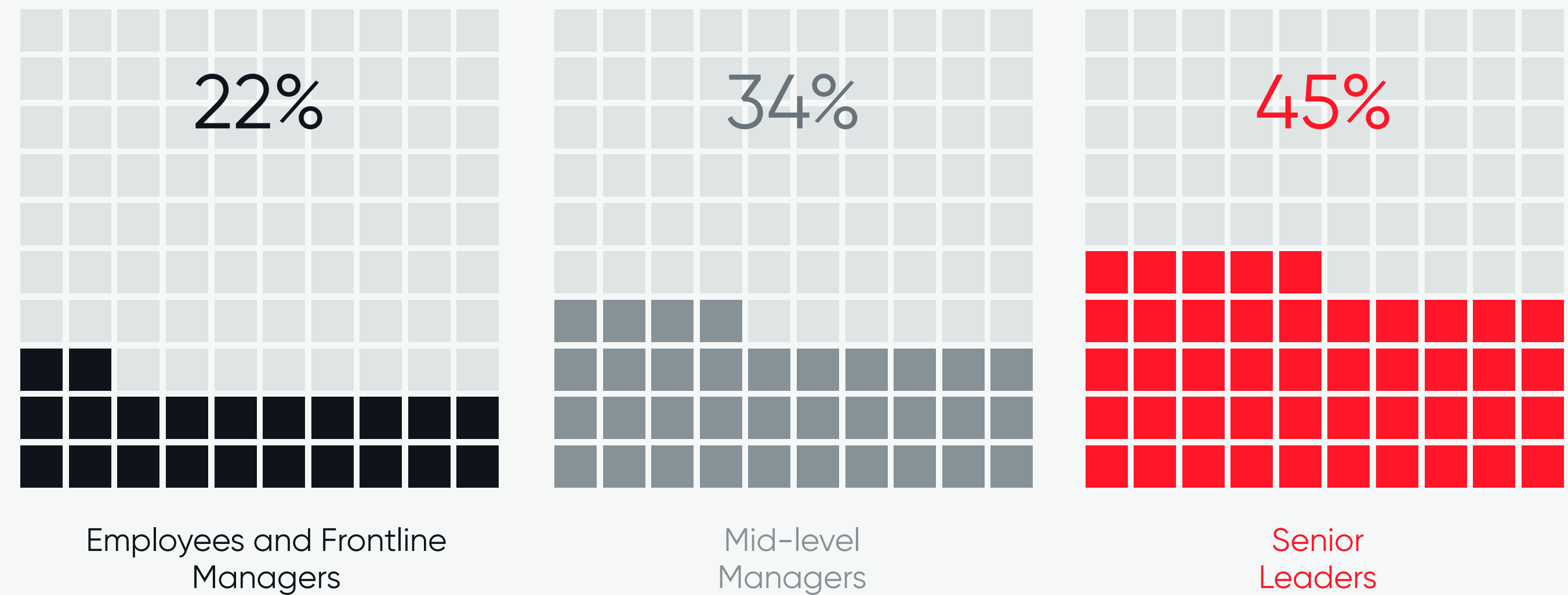
Senior leaders are more aware of AI investments than frontline managers



INSIGHT

Knowledge and perception of investments in AI tools increases with seniority, meaning there needs to be a greater involvement of employees at all levels in conversations about AI tools.

% agree:
"My organisation is making investments in using AI tools", by seniority



AI

Organisational AI readiness is linked to employee empowerment

3 in 4 AI ready organisations celebrate people who try to do new things

INSIGHT

In AI business ready organisations management is twice as likely to involve people in decisions affecting their work.

METHODOLOGY

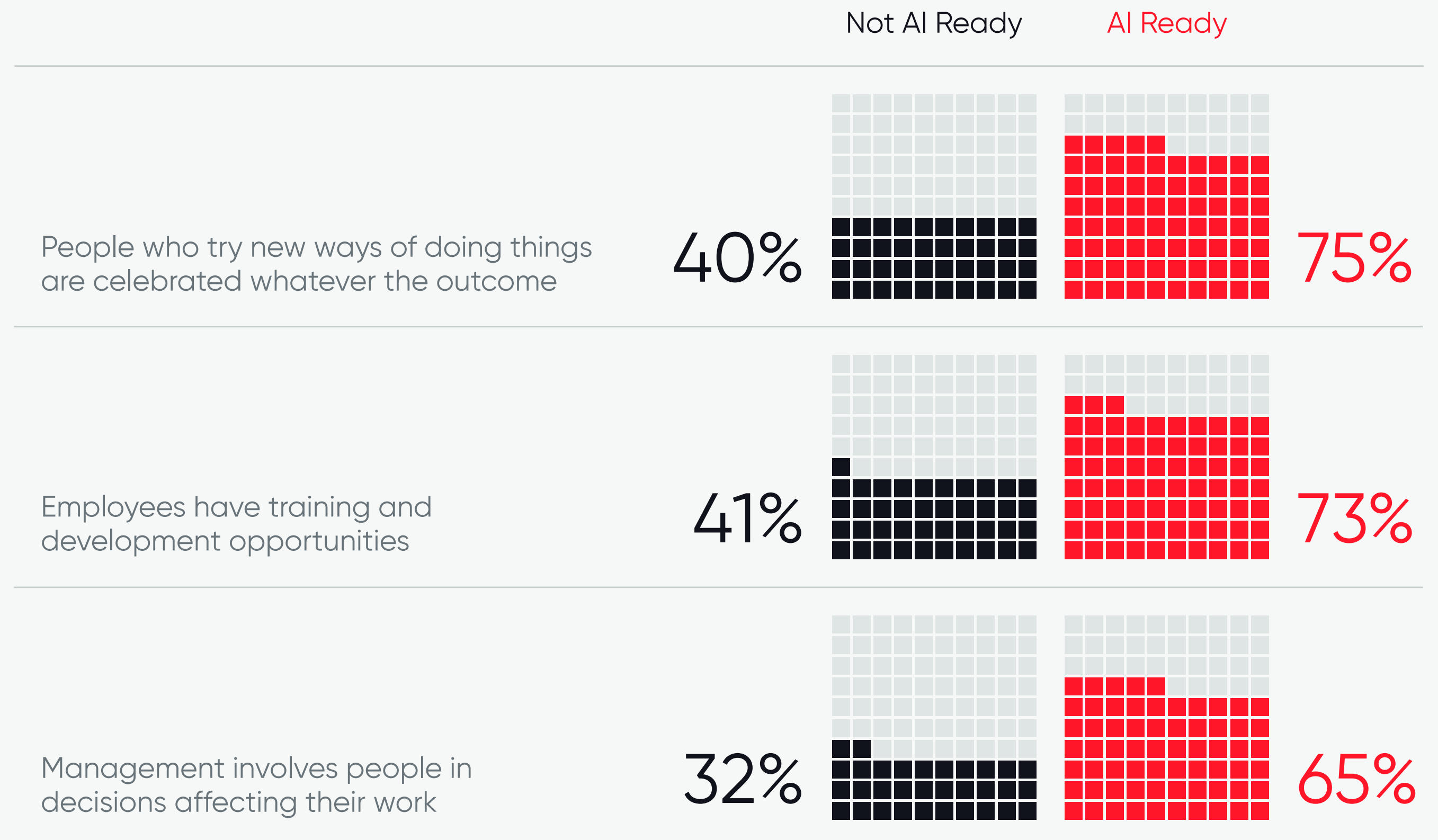
Using multiple regression, we have identified three drivers of AI business readiness: there is a two-fold difference in the scores between AI ready organisations and those that aren't ready.

EXPLAINER

Organisations that are AI business ready are those where employees agree with "My organisation is making investments in using AI tools".

Top drivers of AI business readiness

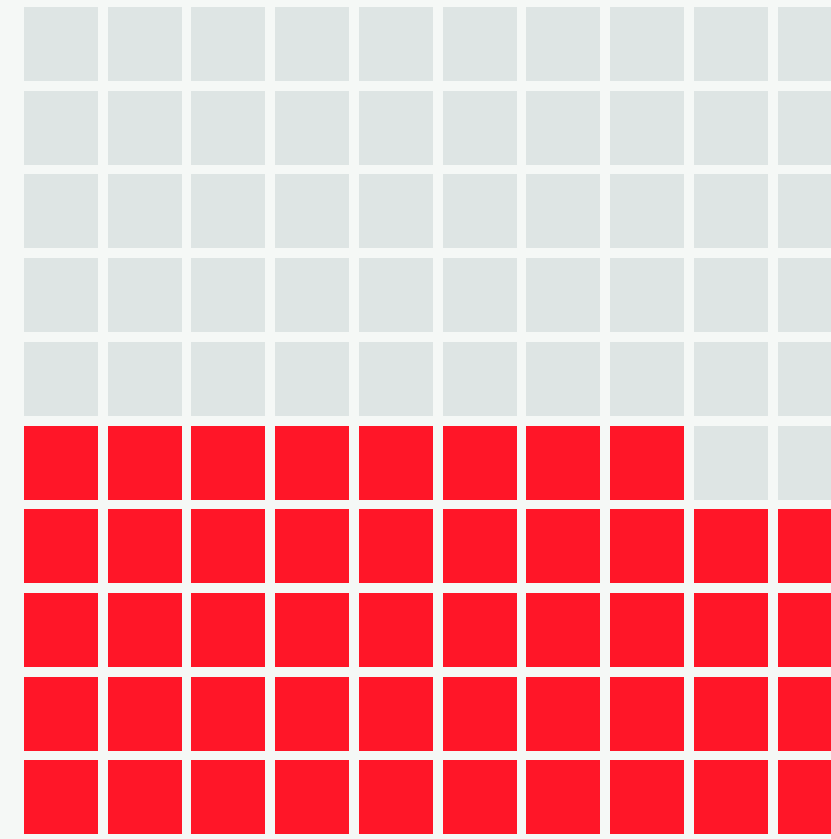
The **difference** in % agreement with the drivers **between** those working in AI ready organisations and those working for not AI ready organisations



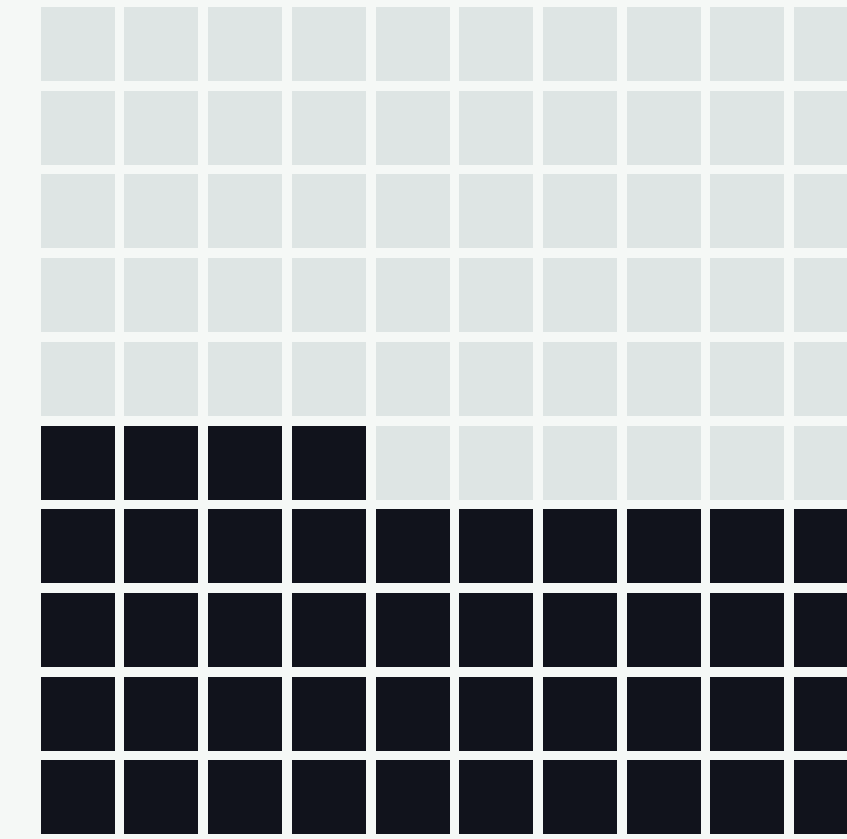
ESG

Only 48% of the workforce believes their organisation's decisions benefit society

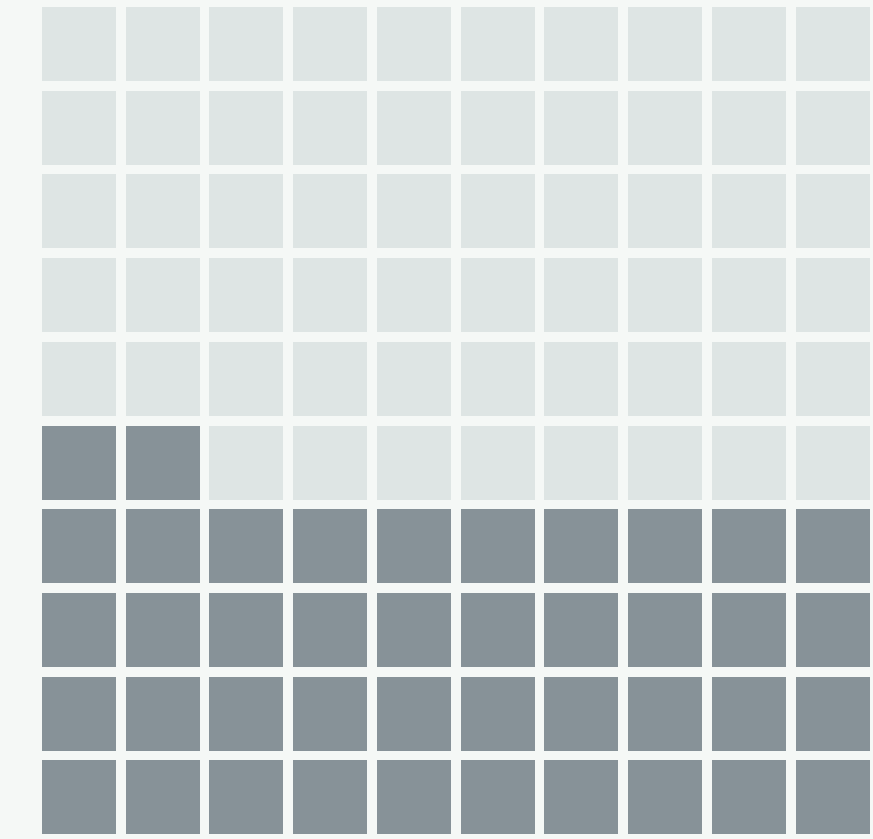
ESG (environmental, social, governance) efforts are not yet widely effective



Only 48%
of the workforce
think that their
organisation's
business decisions
benefits the
environment, society
or human wellbeing



Only 44%
of the workforce
agree that
management clearly
communicates
the organisational
impact on the
environment,
society and human
wellbeing



Only 42%
of the workforce
feel that people
committed to ESG
receive enough
support

ESG

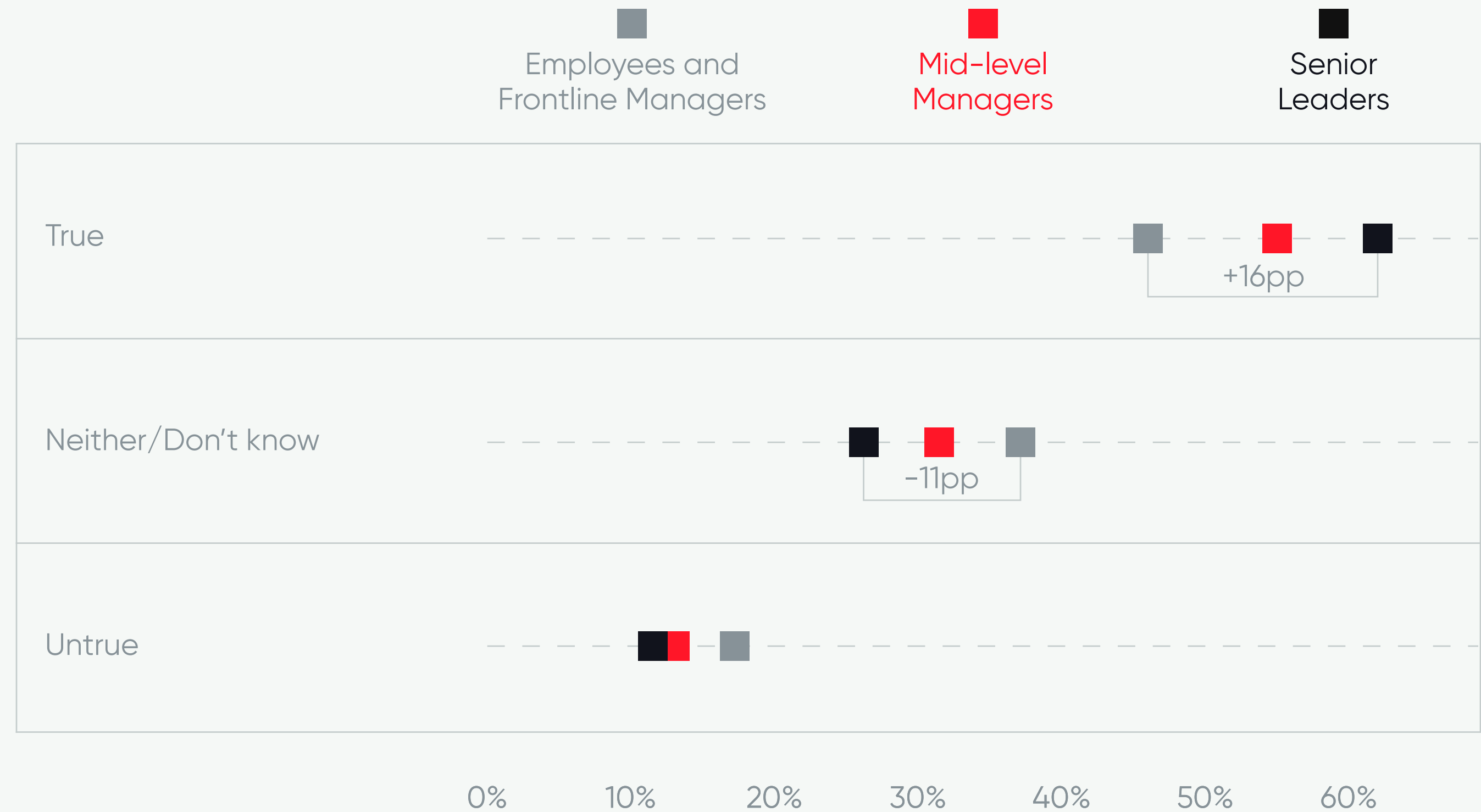
Leaders are out of sync with employees on ESG impact

Leaders overestimate their organisation's positive influence on environmental, social, and governance outcomes

! INSIGHT

There are gaps in perceptions about ESG between senior leaders and more junior employees. While 62% of senior leaders believe that their business decisions meaningfully improve the environment, society or human well-being, only 46% of employees agree.

% agree:
"My organisation's business decisions meaningfully improve the environment, society or human well-being"



ESG

ESG starts at home: organisations living their values are more successful

Organisations, where leaders embody organisational values, excel in ESG efforts

! INSIGHT

In organisations successful in their ESG efforts leaders are 3.4 times more likely to live organisational values.

⚙️ METHODOLOGY

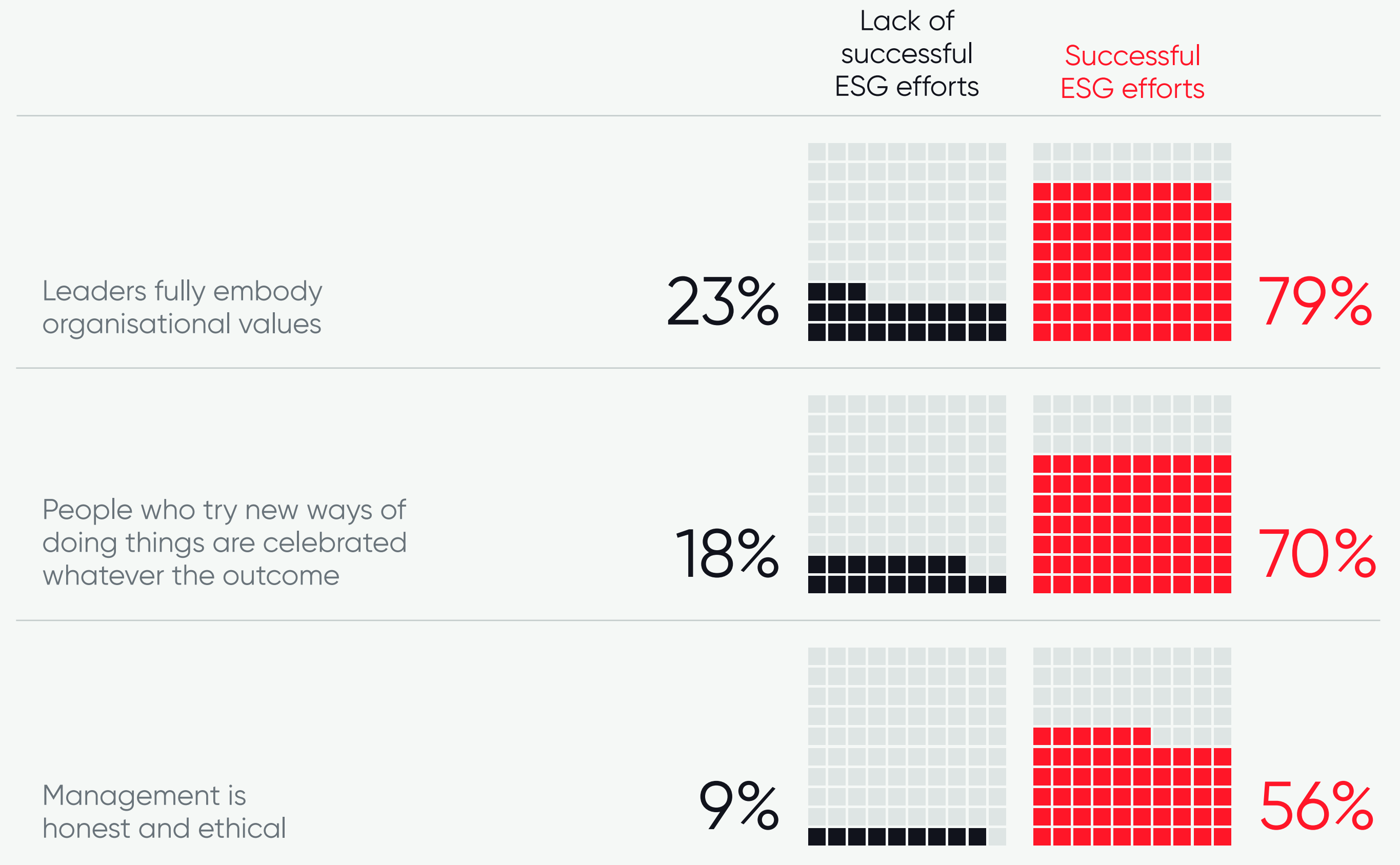
Using multiple regression, we have identified three drivers of ESG success: there is a huge difference in the scores between organisations with successful ESG efforts and those without.

📄 EXPLAINER

Organisations with successful ESG efforts are those where employees agree with "My organisation's business decisions meaningfully improve the environment, society or human well-being".

Top drivers of ESG success

The difference in agreement with the drivers between those working in organisations with successful ESG efforts and those who don't



HYBRID WORK

Hybrid work is becoming the norm for 1 in 4 European employees

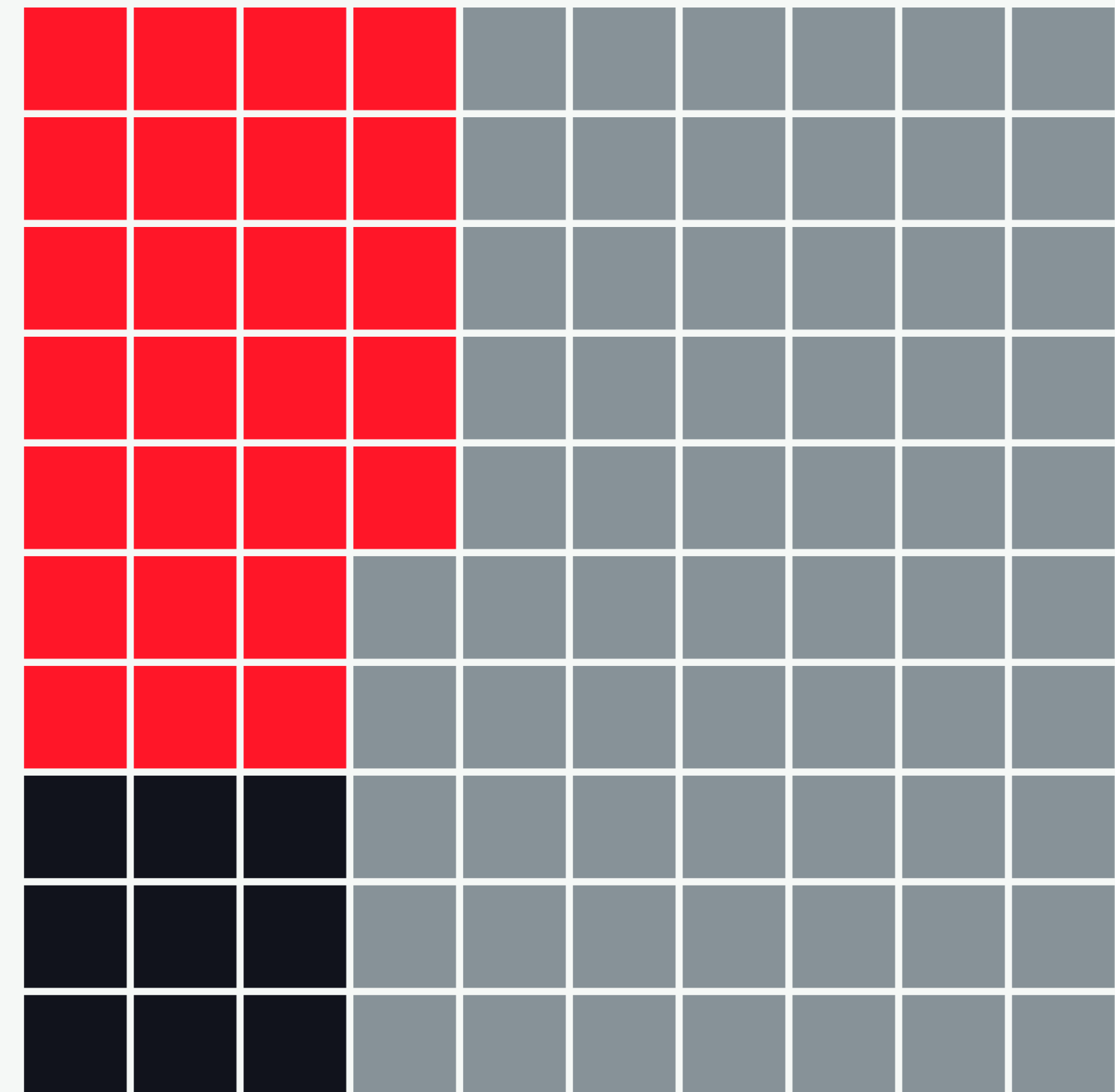
The majority of employees still work onsite, but hybrid is gaining ground

Where does the workforce conduct their work?

26%
Hybrid

9%
Remote

65%
Onsite



HYBRID WORK

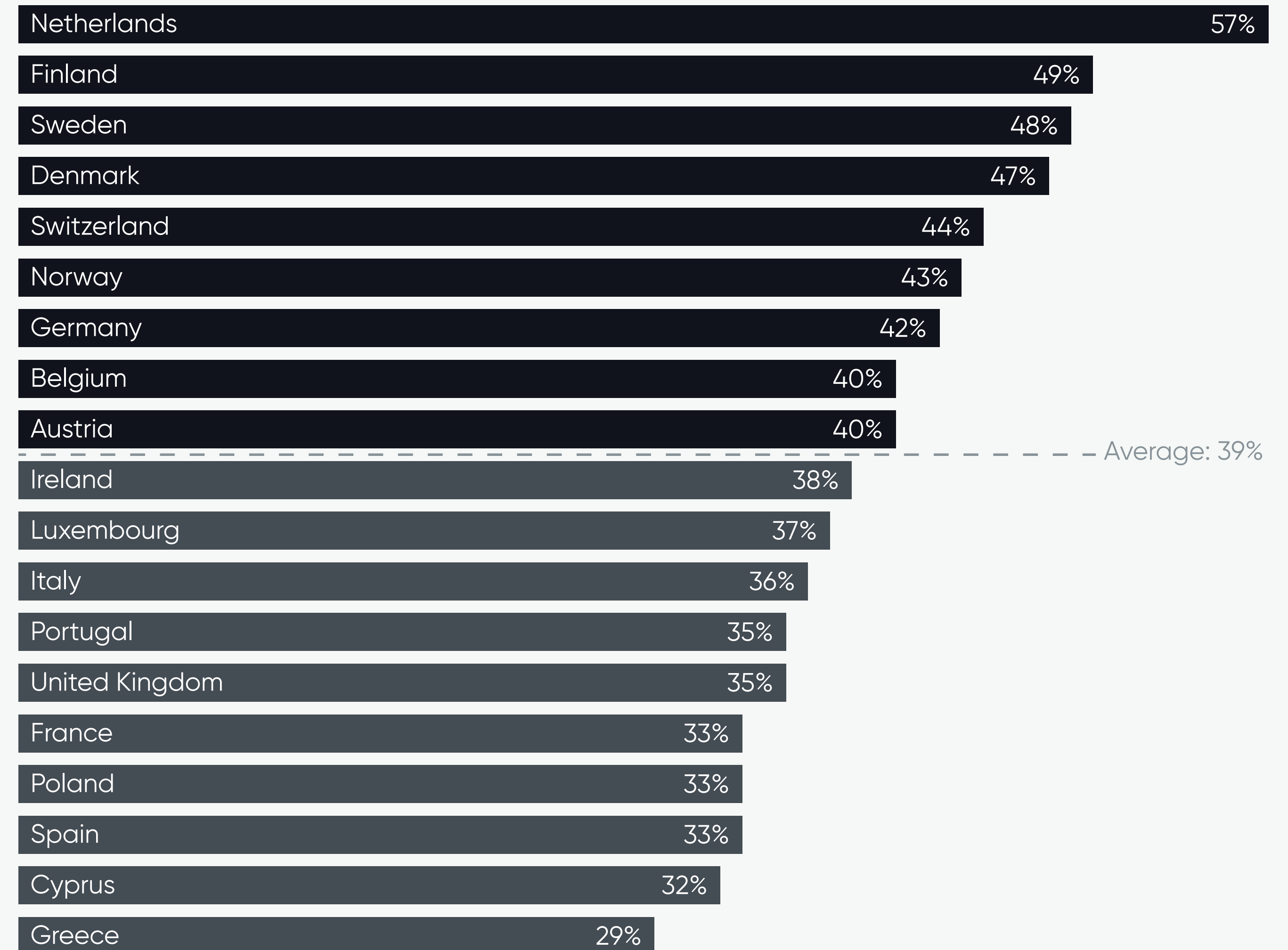
Workforce flexibility differs across Europe

The Netherlands and Scandinavia lead in offering employees work flexibility

EXPLAINER

The difference between the countries is in part, due to the types of industries prevalent in each country, but mostly due to the workplace culture of trust.

% employees that choose where they work

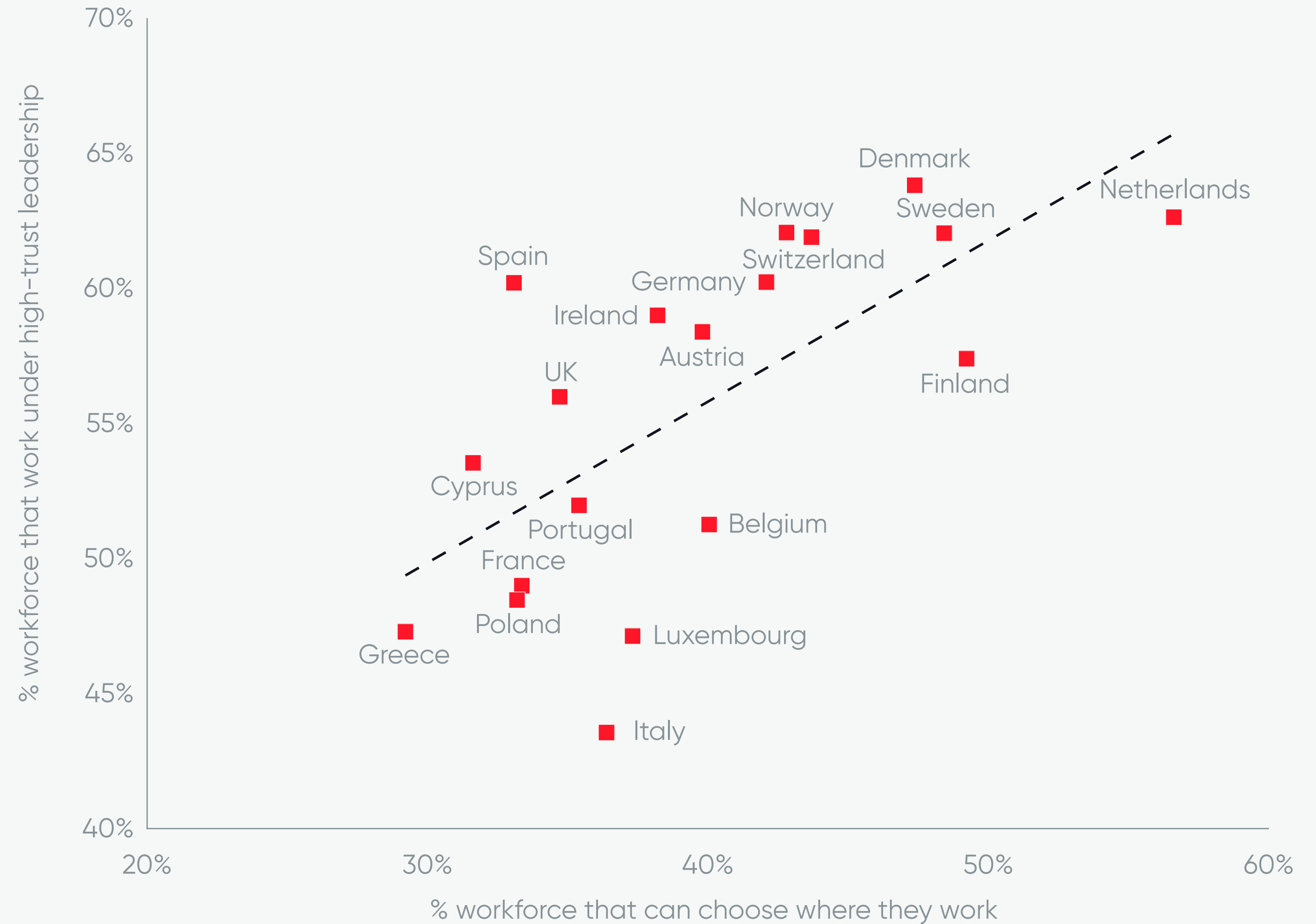


HYBRID WORK

Successful workforce flexibility is a product of high-trust leadership

Employees in high-trust environments experience more flexibility at work

Workforce flexibility is linked to high-trust leadership



HYBRID WORK

When employees decide, they prefer hybrid work

57% of employees choose hybrid work over fully onsite when given the option

INSIGHT

Employers are not in-sync with what's best for employees and organisational performance. When employers decide where employees should work, most of them (83%) choose onsite. When employees decide - they choose hybrid (57%).

Who decides where people work

Where employees work by who makes the decision

Where employees work

		Onsite	Remote	Hybrid
Who decides where people work	Employee	31%	11%	57%
	Team	49%	17%	34%
	Employer	83%	6%	11%

HYBRID WORK

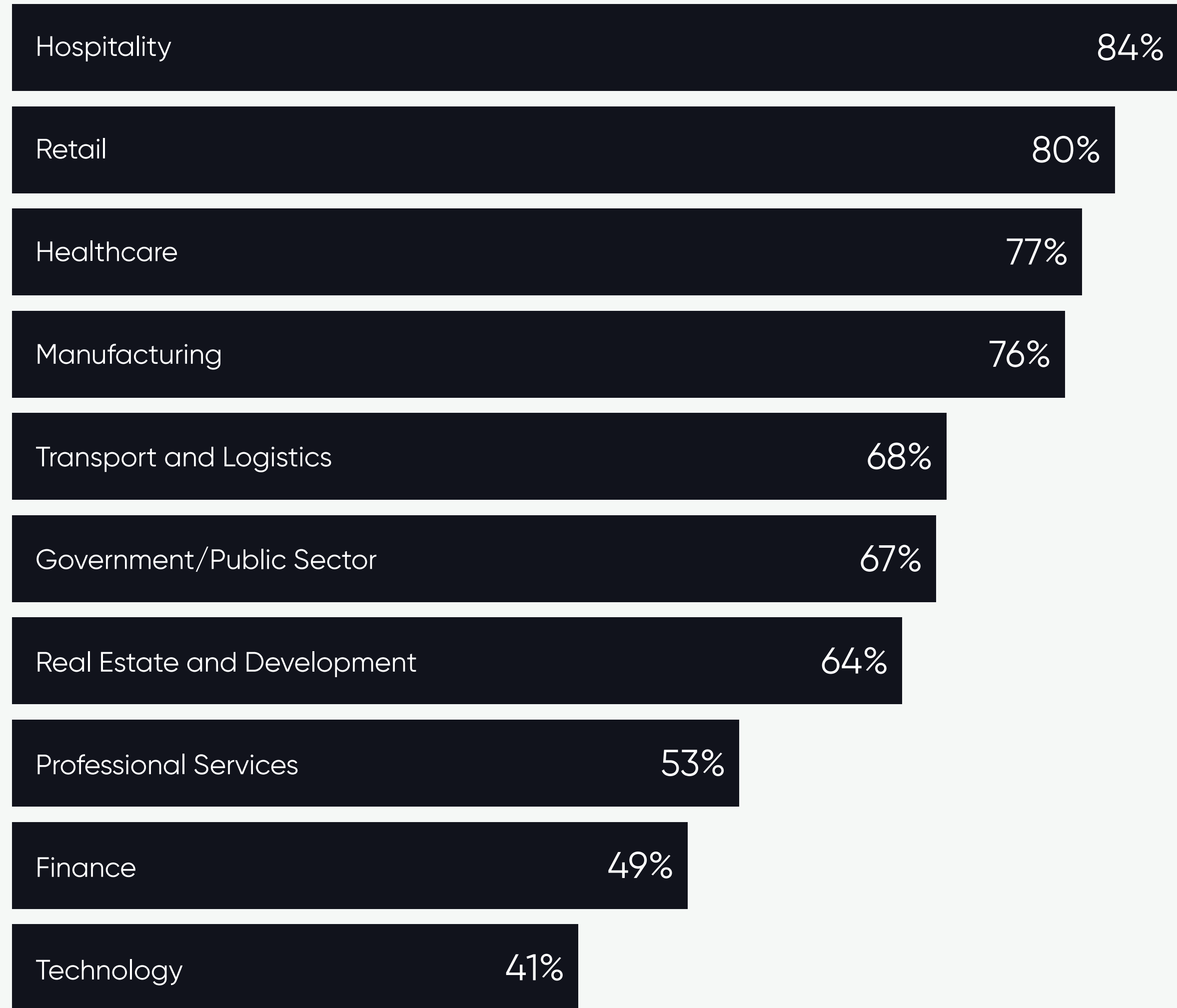
Some industries have no choice but to work onsite

Onsite work dominates industries like hospitality, retail, and healthcare, limiting flexibility

! INSIGHT

Employees in professional services, finance and tech have a choice.

% workforce work onsite by industry



HYBRID WORK

Hybrid workers are less likely to leave

Hybrid work arrangements improve employee retention

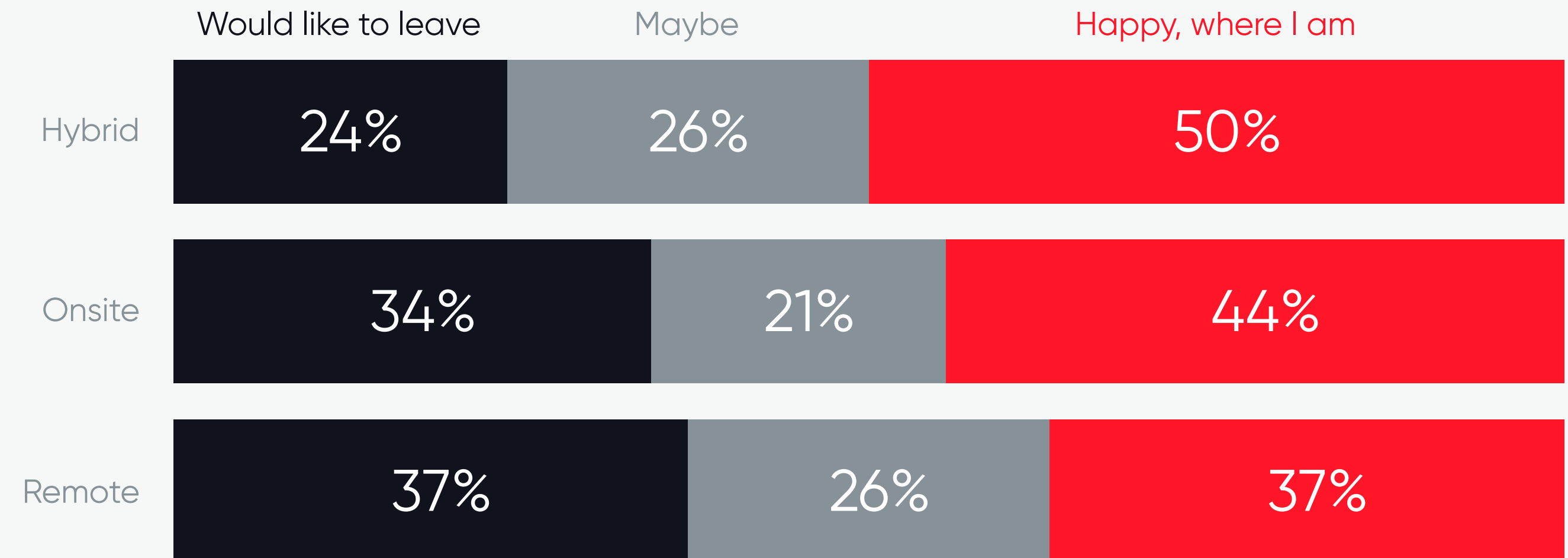
EXPLAINER

In many industries, such as retail, hospitality and manufacturing, employees can't choose where they work.

Therefore, for this analysis we have chosen industries, where people told us they had a choice. These are: tech, finance and professional services.

"Will you be looking for a new job this year?"

By mode of work in industries, where employees are relatively free to choose where to work: tech, finance and professional services



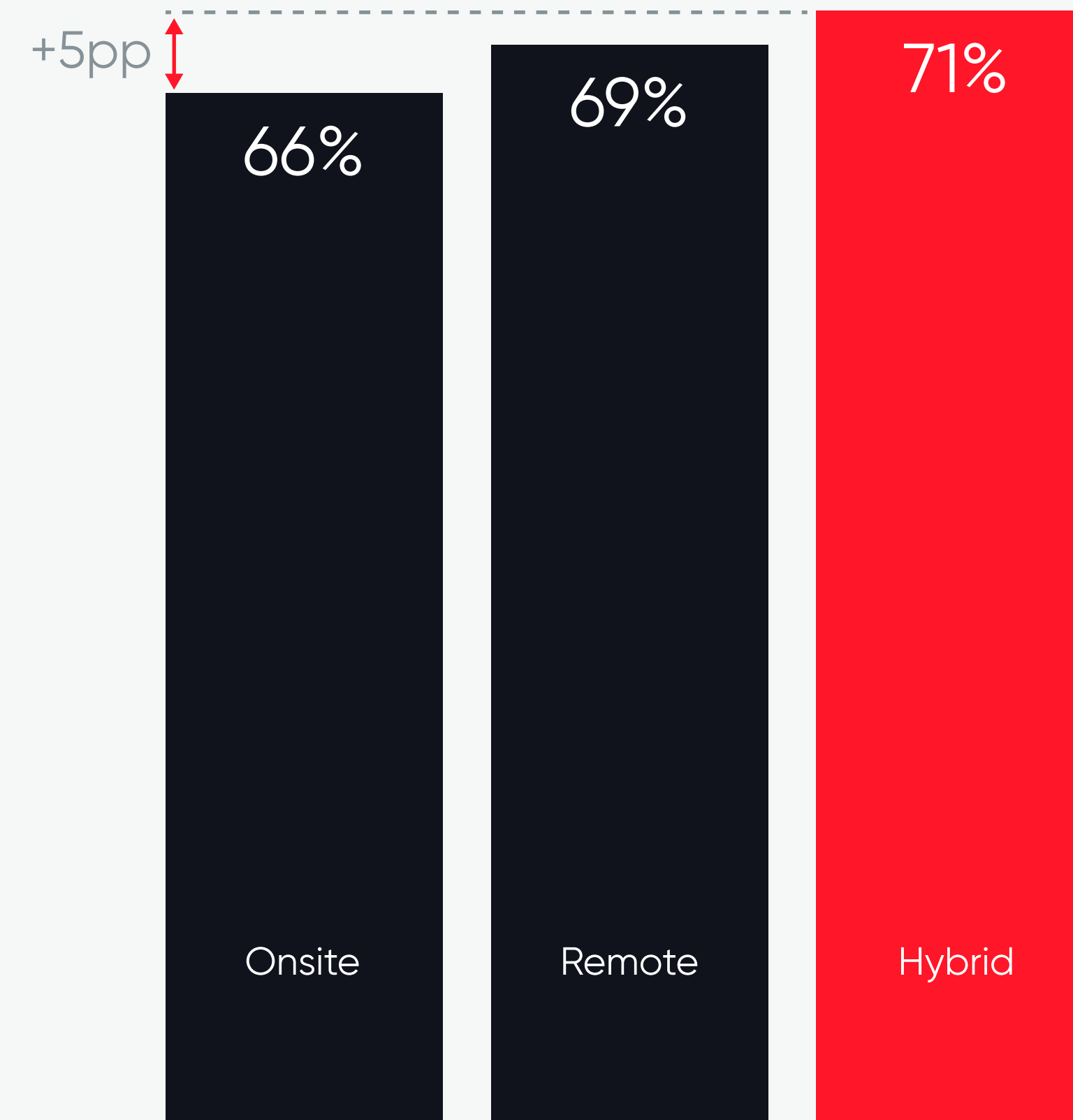
HYBRID WORK

Hybrid work leads to more innovation

Hybrid employees have more opportunities to innovate than onsite workers

% workforce who had opportunities to develop new things and do things better

By mode of work in industries, where employees are relatively free to choose where to work: tech, finance and professional services



HYBRID WORK

Hybrid work leads to better business outcomes

Employee satisfaction is higher in hybrid environments compared to fully onsite

! INSIGHT

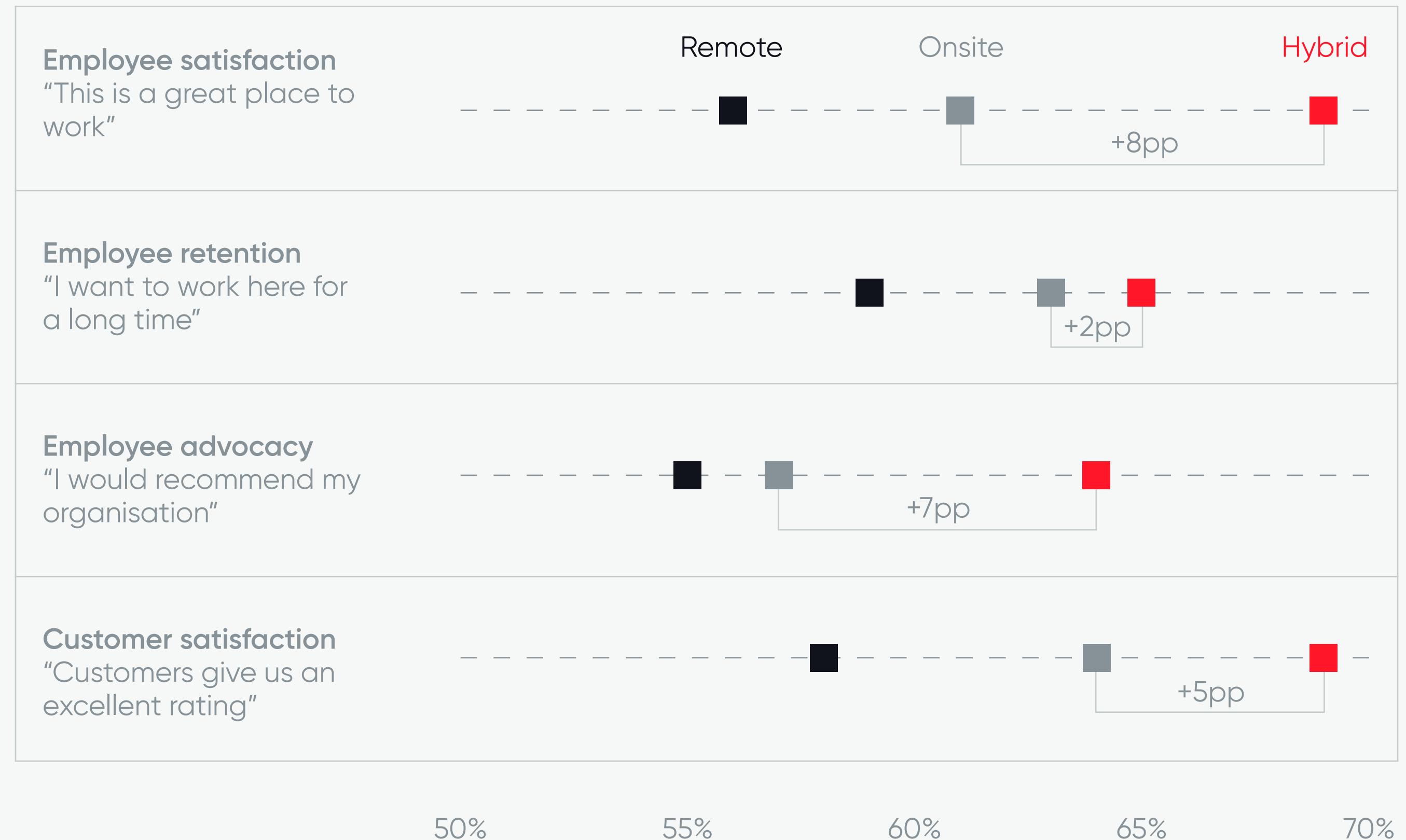
On average, employee satisfaction is 8 percentage points higher when they work in a hybrid way vs. fully onsite.

📄 EXPLAINER

In many industries, such as retail, hospitality and manufacturing, employees can't choose where they work.

Therefore, for this analysis we have chosen industries, where people told us they had a choice. These are: tech, finance and professional services.

Business outcomes by mode of work
in industries, where employees are relatively free to choose where to work: tech, finance and professional services



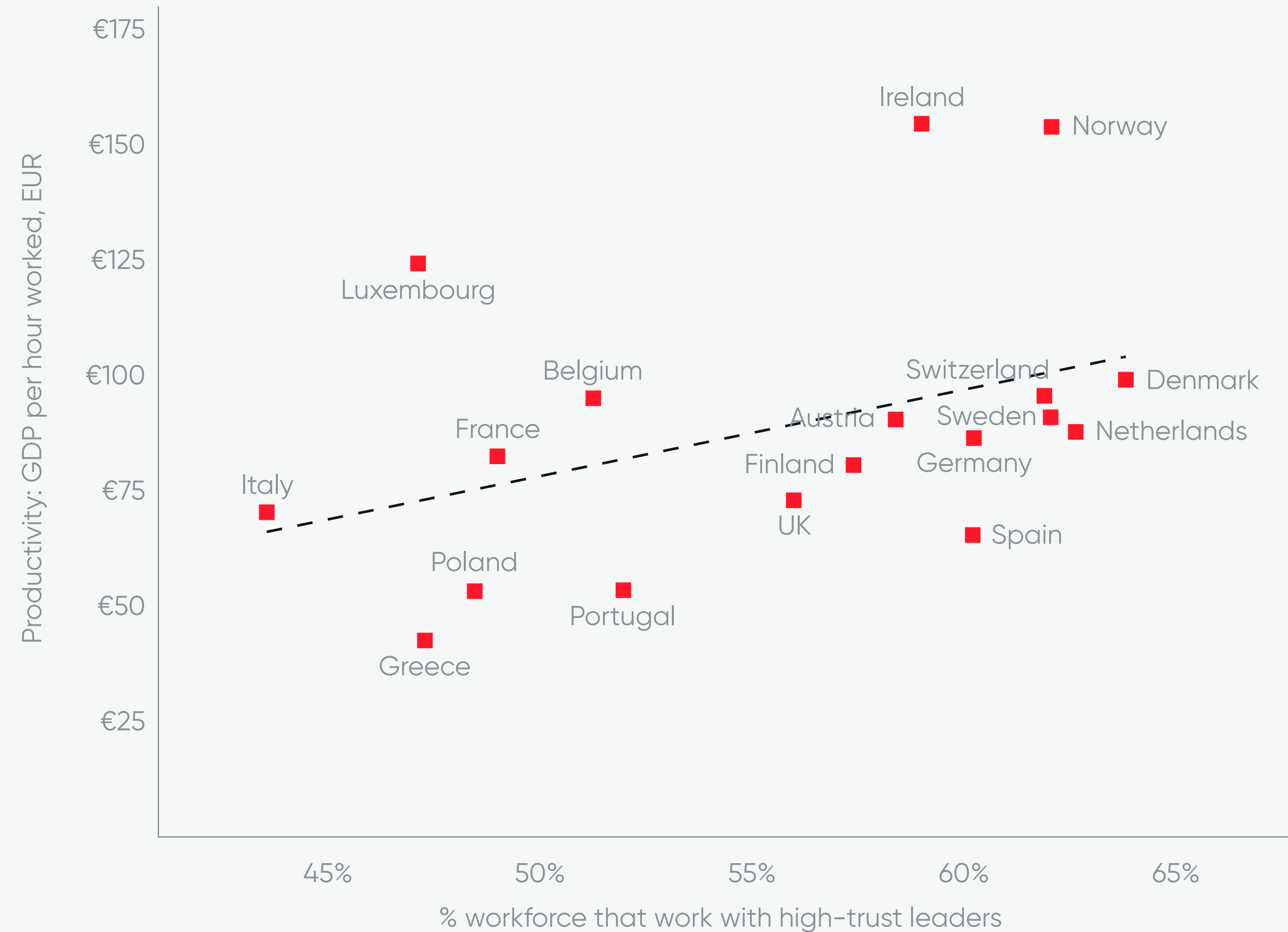
CHAPTER 04

Effective leadership
is built on trust,
proximity skills and
psychological safety

High-trust leadership: the benchmark of leadership effectiveness

Trust-based leadership drives superior workforce engagement and business outcomes

Labour productivity, expressed as GDP per hour worked¹ vs. average % agree with high-trust leadership statements



¹ Source: OECD

Europe's leaders fall short in proximity leadership skills

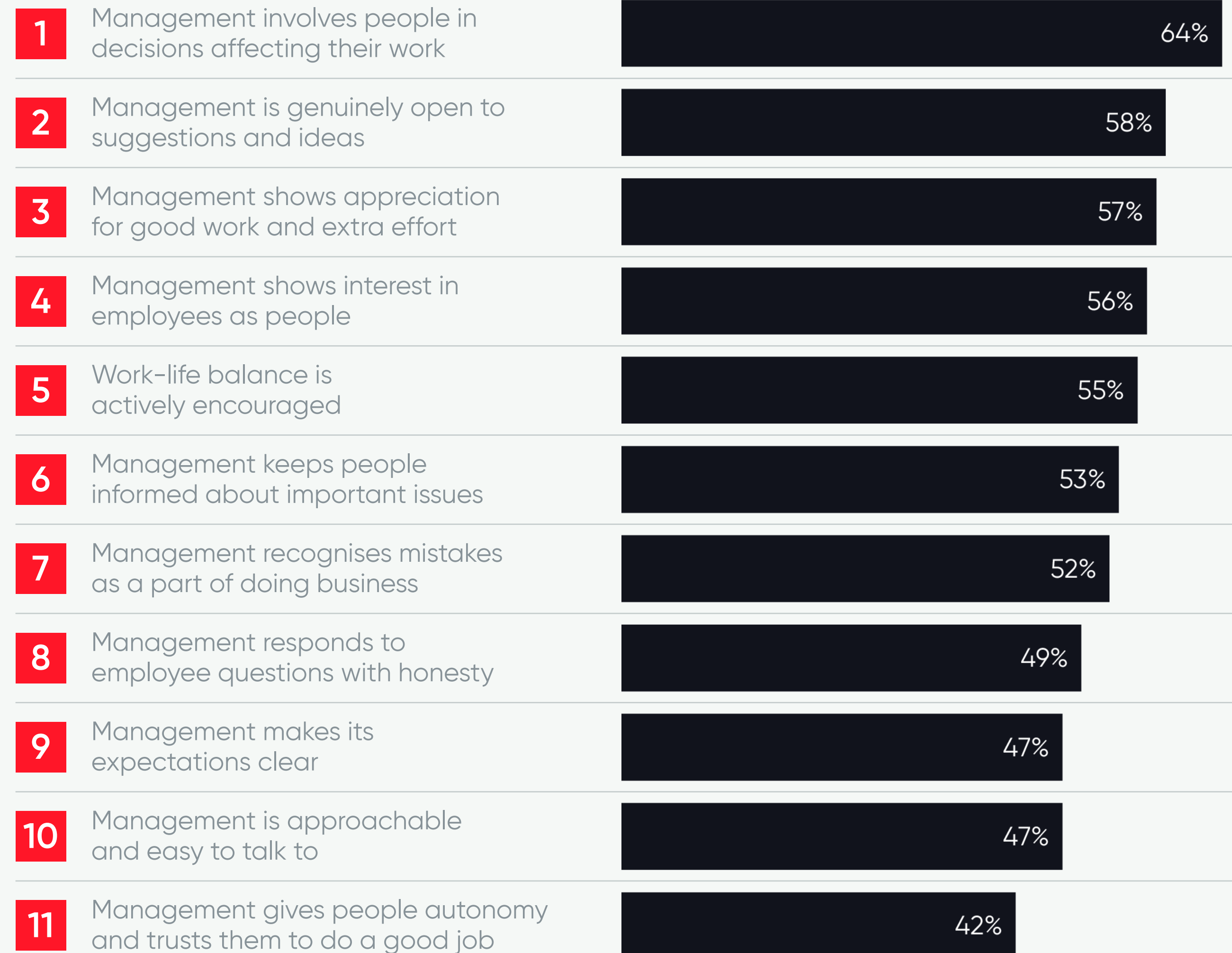
Fewer than 1 in 2 leaders are approachable or trust people to do a good job

EXPLAINER

Proximity leadership is a fundamental skill. When leaders develop the ability to get proximate, they leverage empathy, curiosity and authenticity and integrate them into their leadership skill set.

We have identified 11 statements to measure proximity leadership skills.

% agree with proximity leadership skills statements



Proximity leadership skills vary widely across Europe

Leaders in Northern Europe outperform their Southern counterparts in engaging with employees

⚙️ METHODOLOGY

We calculated the average percentage agreement with the 11 statements that define proximity leadership skills for each country and European Best Workplaces.

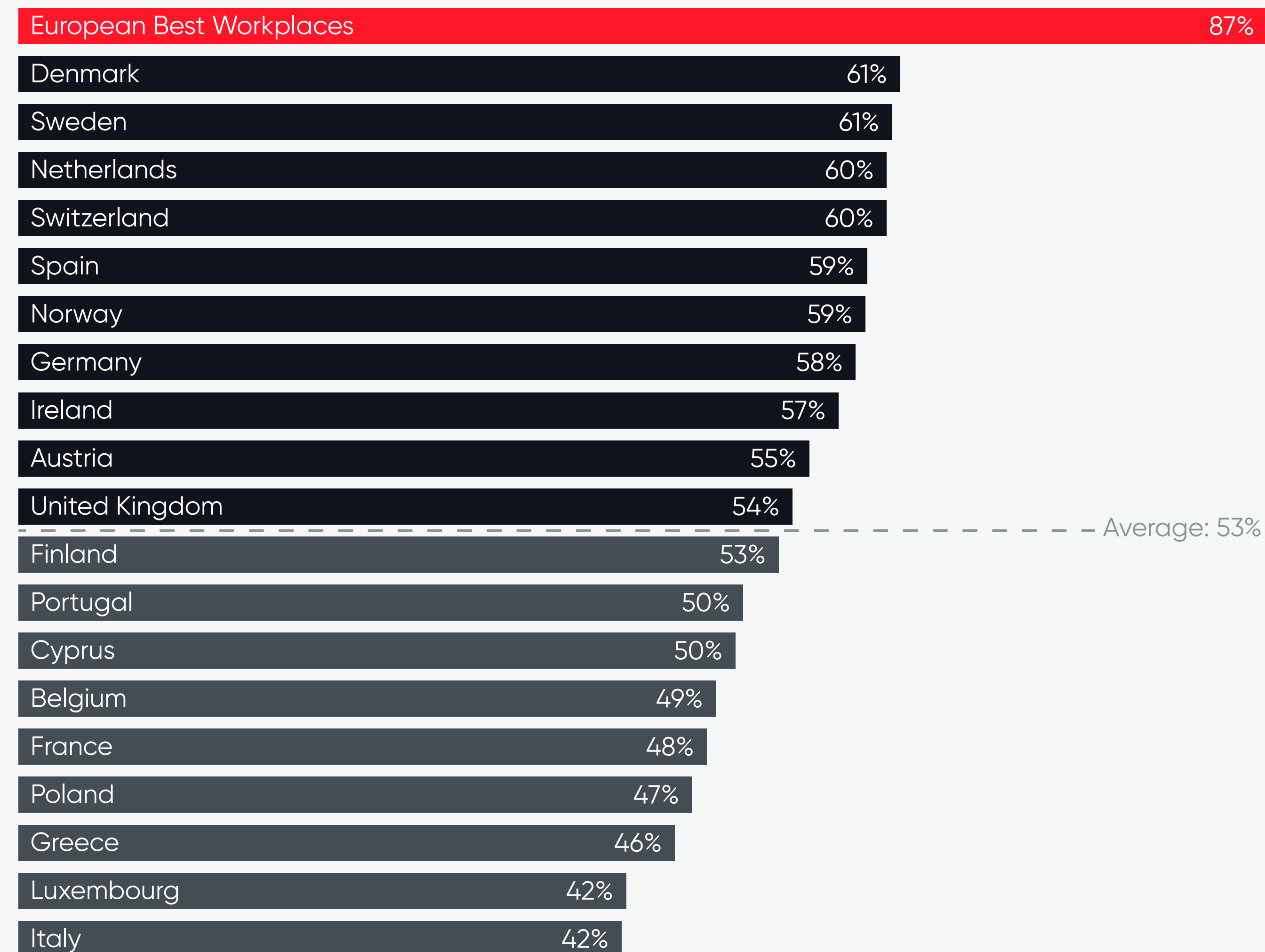
💡 INSIGHT

Denmark, Sweden, the Netherlands and Switzerland lead on proximity skills, outperforming bottom-ranking Luxembourg and Italy by almost 20pp.

📖 EXPLAINER

“European Best Workplaces” is a blended benchmark combining data from 2024’s Fortune’s 100 Best Companies To Work For™ in Europe List makers (organisations with 500+ employees) and the 100 Best Small & Medium Workplaces in Europe™ List makers (50–499 employees).

Average % of the workforce that agrees with leadership proximity statements



Top organisations excel by minimizing the leadership proximity gap

When leaders and employees perceive leadership the same way, overall performance is higher

⚙️ METHODOLOGY

We calculated the average percentage agreement with the 11 statements that define proximity leadership skills.

💡 INSIGHT

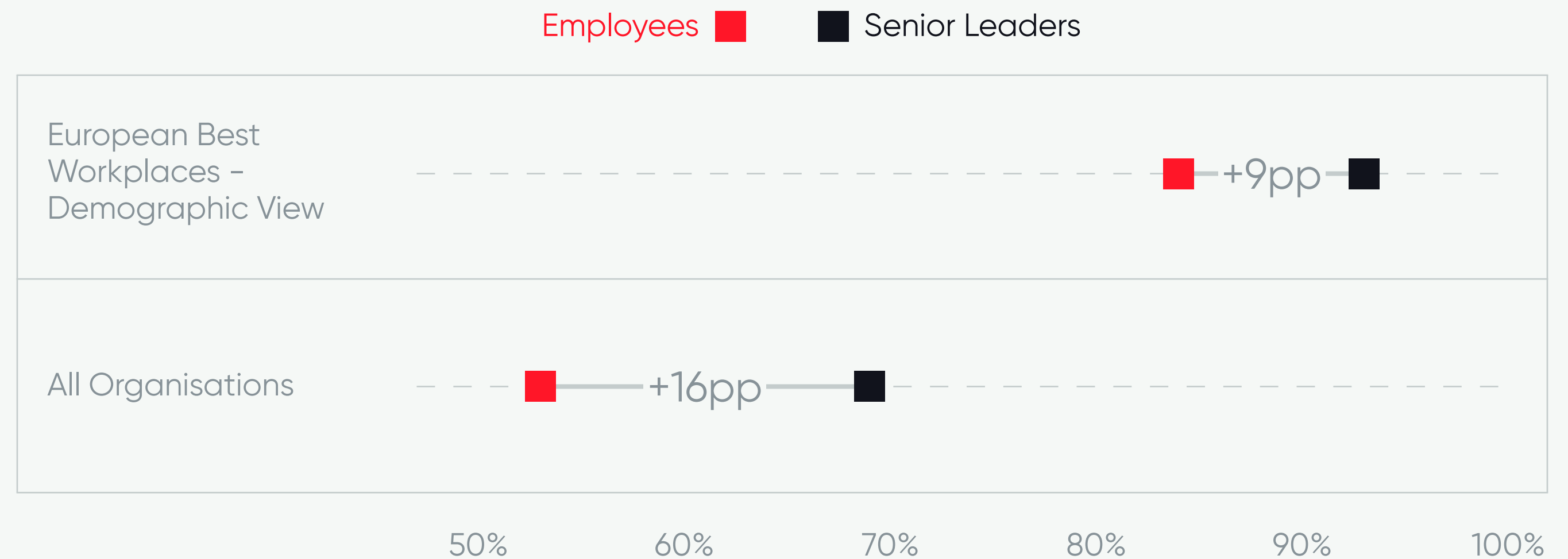
Senior leaders vastly overestimate their proximity leadership skills. The gap in European Best Workplaces is much narrower: half of what it is in all organisations.

📖 EXPLAINER

European Best Workplaces – Demographic View is a sub-category of European Best Workplaces benchmark, that includes seniority level data and is the aggregate of six¹ National Best Workplaces Lists most representative of the European landscape and range of company sizes.

¹ The six countries included are: Norway, Netherlands, Germany, UK, France and Italy.

Average % agree with leadership proximity statements



Leaders overestimate their proximity skills in many countries

European powerhouses France, Germany, UK and Italy have the largest proximity gaps, affecting workplace culture

EXPLAINER

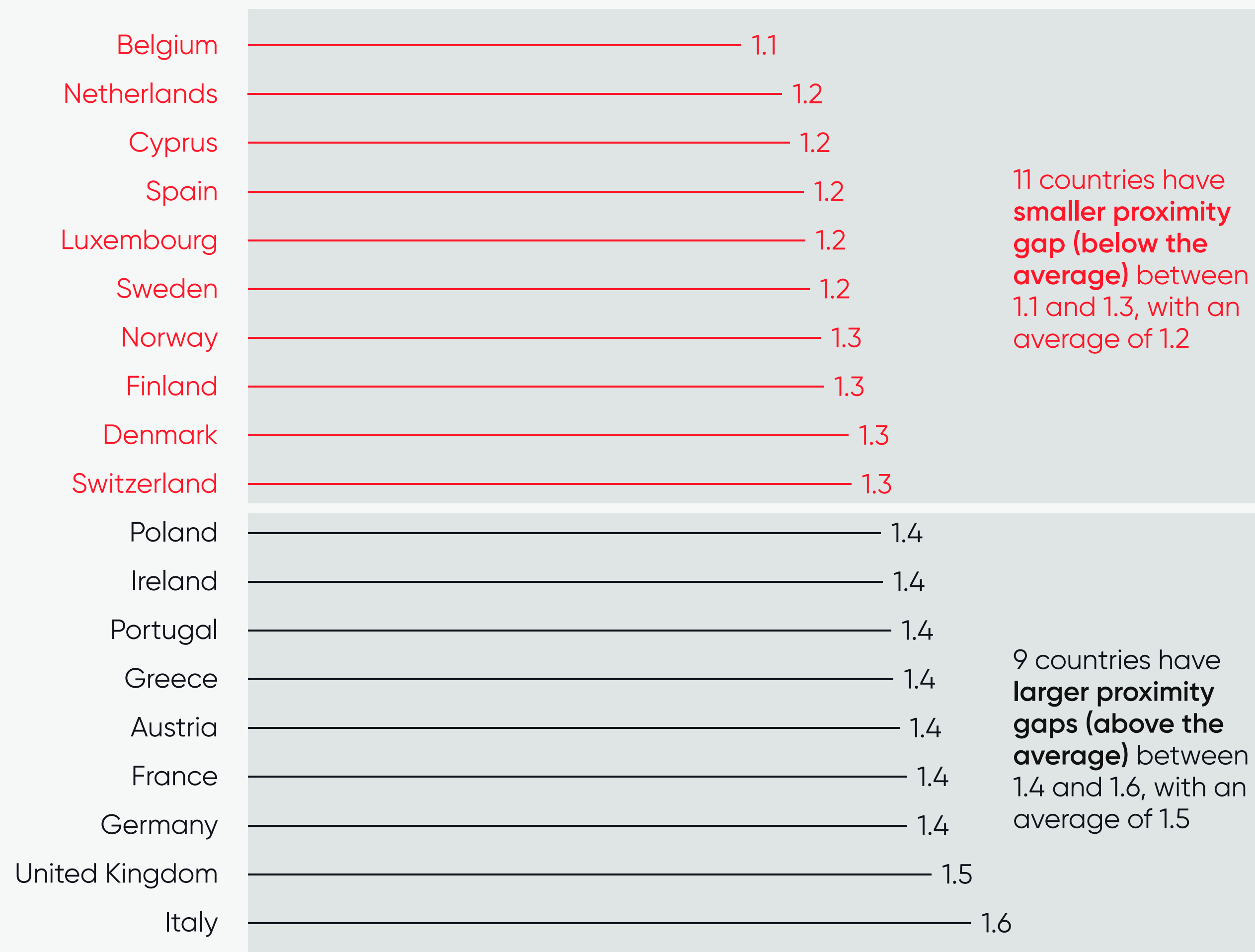
Proximity gap is a ratio of the average perception of proximity leadership skills among senior leaders to the average perception among employees. It's calculated by dividing the average percentage agreement to the 11 proximity leadership statements among senior leaders by the average percentage agreement among the employees. The lower the ratio, the smaller the proximity gap.

INSIGHT

Belgium has the smallest proximity gap of 1.1, meaning that leaders rate their proximity skills only slightly above the employees and are in-touch with them. Belgium has a strong tradition of workplace dialogue, and even when there are problems, these problems are recognised and experienced at all levels.

Ratio of the perception of leadership proximity, senior leaders to all employees

The lower the ratio the smaller the proximity gap



Closing the proximity gap leads to better business outcomes

Organisations with smaller gaps between leaders and employees achieve stronger outcomes

💡 INSIGHT

Countries with below the average proximity gaps have a 9 percentage point uptick in employee satisfaction.

Because we compare all countries with below the average proximity gap vs all countries with above the average gap, the differences are smaller than if we only compared the countries at each extreme.

📖 EXPLAINER

Proximity gap is a ratio of the average perception of proximity leadership skills among senior leaders to the average perception among employees. The chart shows the average difference between the 11 countries with smaller proximity gaps and 9 countries with larger proximity gaps.

Comparison between countries with a smaller and a larger gap between the perceptions of employees and senior leaders
% employees who agree to the statements below

Employee satisfaction
"This is a great place to work"

Smaller proximity gap

63%

Larger proximity gap

54%

+9pp

Employee retention
"I want to work here for a long time"

62%

57%

+5pp

Employee advocacy
"I would recommend my organisation"

58%

51%

+7pp

Customer satisfaction
"Customers give us an excellent rating"

62%

58%

+4pp

Leaders in most industries are not in sync with their employees

Only the leaders in the professional services and real estate are in-sync with their employees.

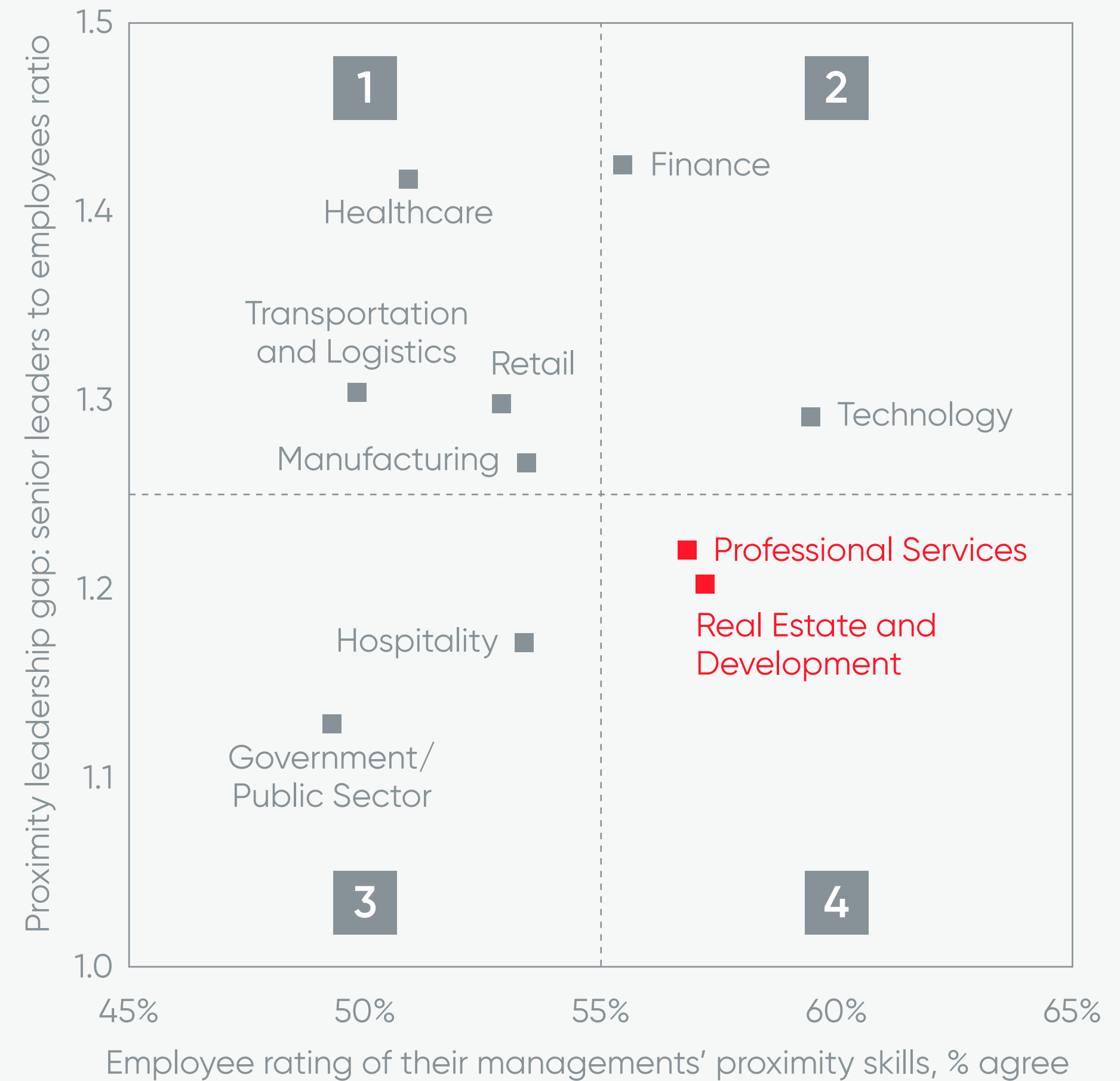
1 Employee rating of their managements' proximity skills is low but leaders don't see the problem

2 Employees rate their managements' proximity skills highly but leaders overestimate themselves

3 Employee rating of their managements' proximity skills is low but leaders are aware of the problems

4 Employees rate their managements' proximity skills highly and leaders are in-sync with the staff

Employee rating of their managements' proximity skills against the proximity gap by industry



Northern Europe leads in psychological safety at work

Norway, Denmark, and the Netherlands offer the most psychologically safe work environments in Europe

INSIGHT

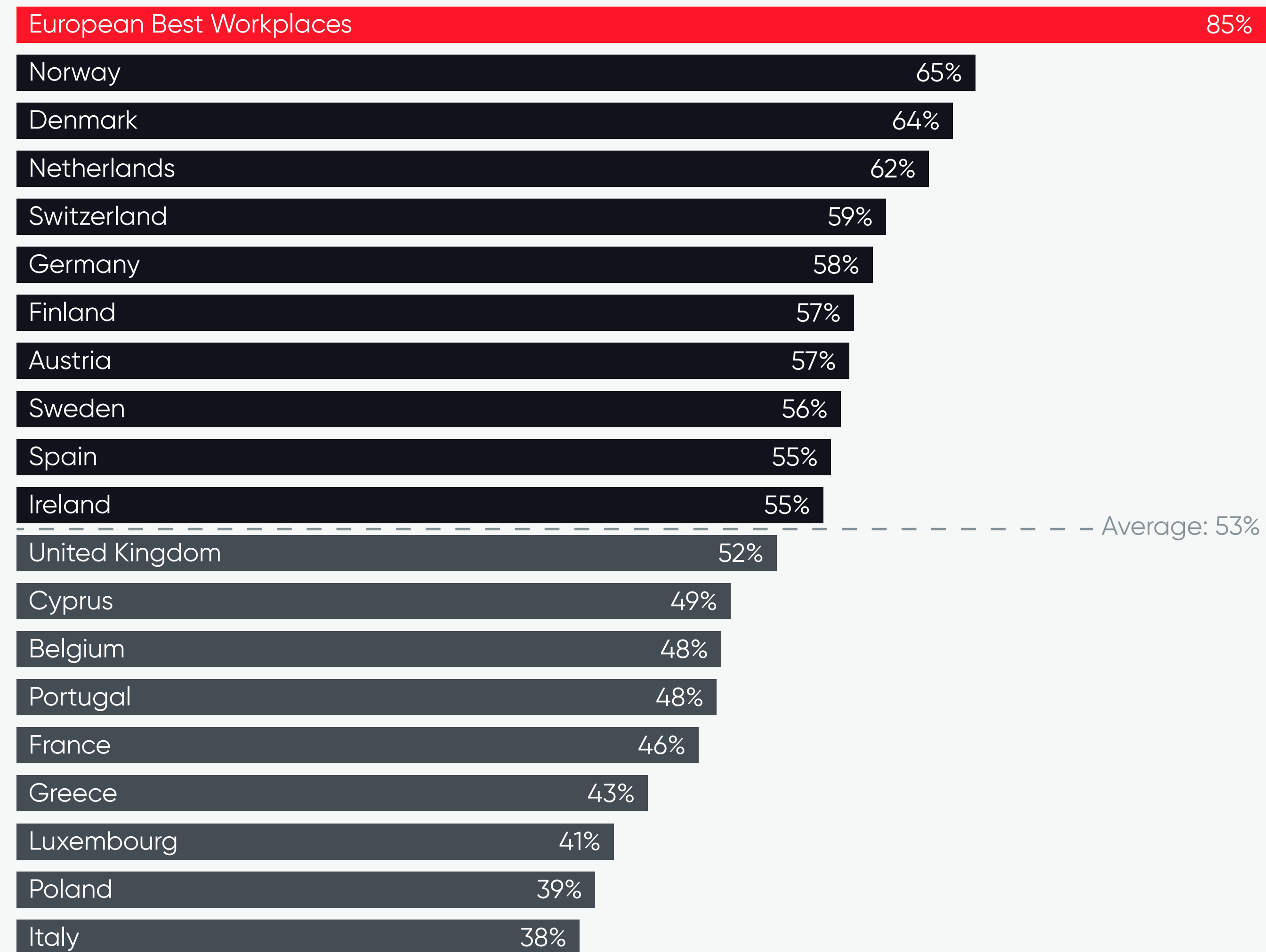
Top ranked countries on psychological safety outperform bottom-ranking countries Greece, Luxembourg, Poland and Italy by 20 percentage points or more.

EXPLAINER

“European Best Workplaces” is a blended benchmark combining data from 2024’s Fortune’s 100 Best Companies To Work For™ in Europe List makers (organisations with 500+ employees) and the 100 Best Small & Medium Workplaces in Europe™ List makers (50–499 employees).

% agree:

“This is a psychologically and emotionally healthy place to work”, by country

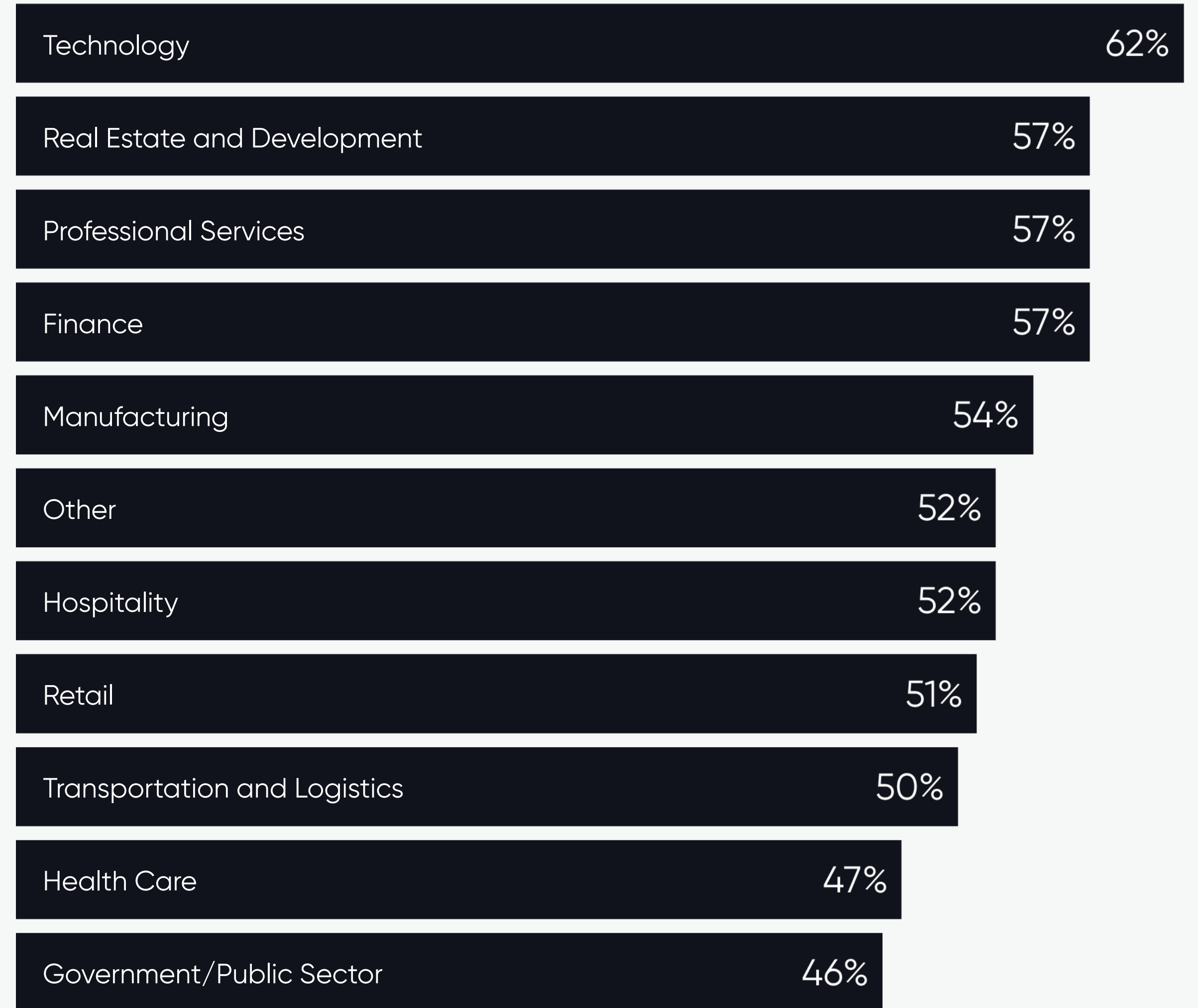


Tech sector leads in psychological safety, but there's room for improvement

Healthcare and government sectors lag in providing psychologically safe environments

% agree:

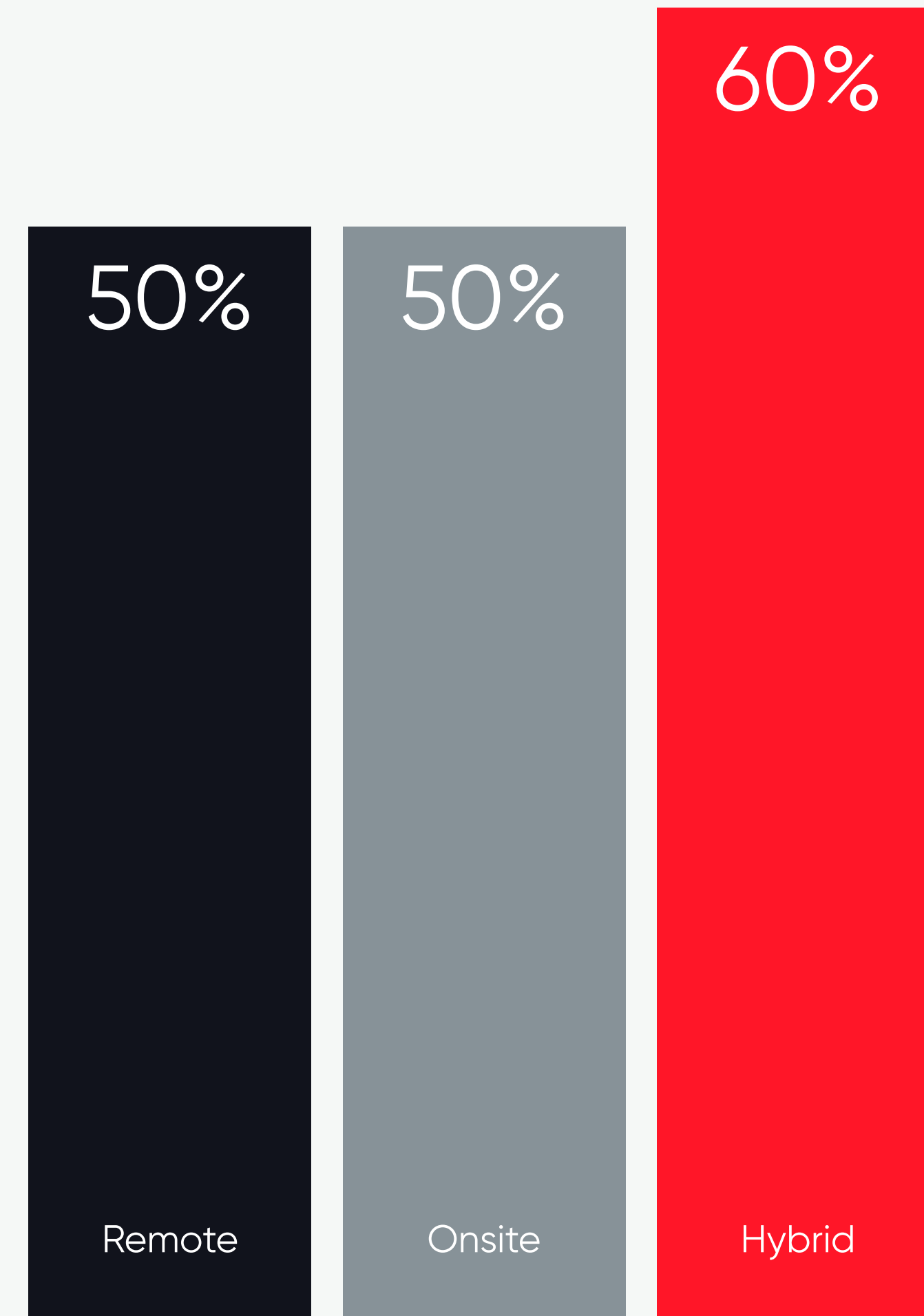
"This is a psychologically and emotionally healthy place to work", by industry



Hybrid workers feel more psychologically safe than fully onsite employees

Hybrid work arrangements create a greater sense of emotional security

% agree:
"This is a psychologically and emotionally healthy place to work"
By mode of work



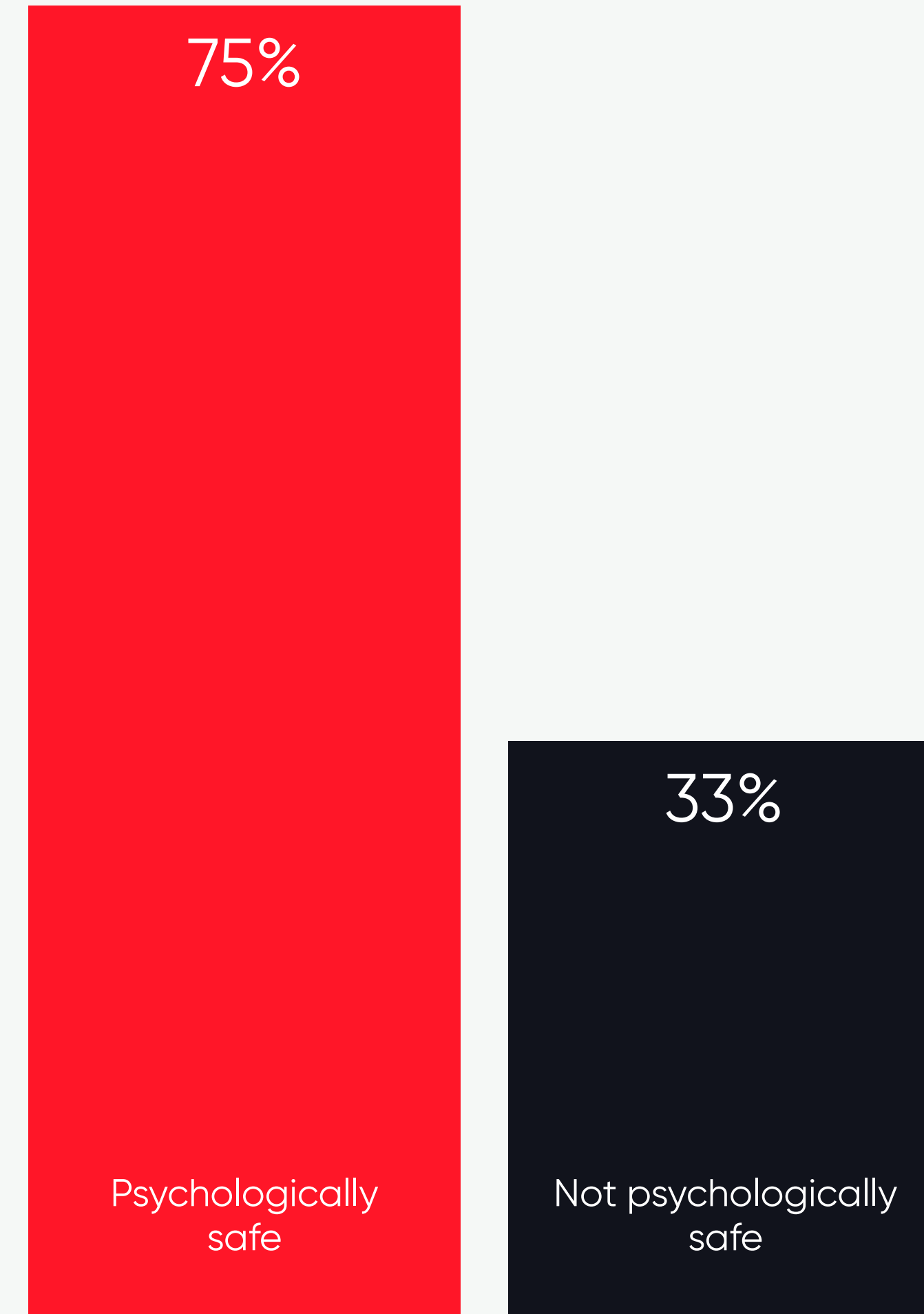
Psychological safety fosters change and innovation

Psychologically safe employees are more likely to develop new ideas

EXPLAINER

Psychologically safe workplaces are those where employees agree with the statement 'This is a psychologically and emotionally healthy place to work'. Where employees disagree are not psychologically safe.

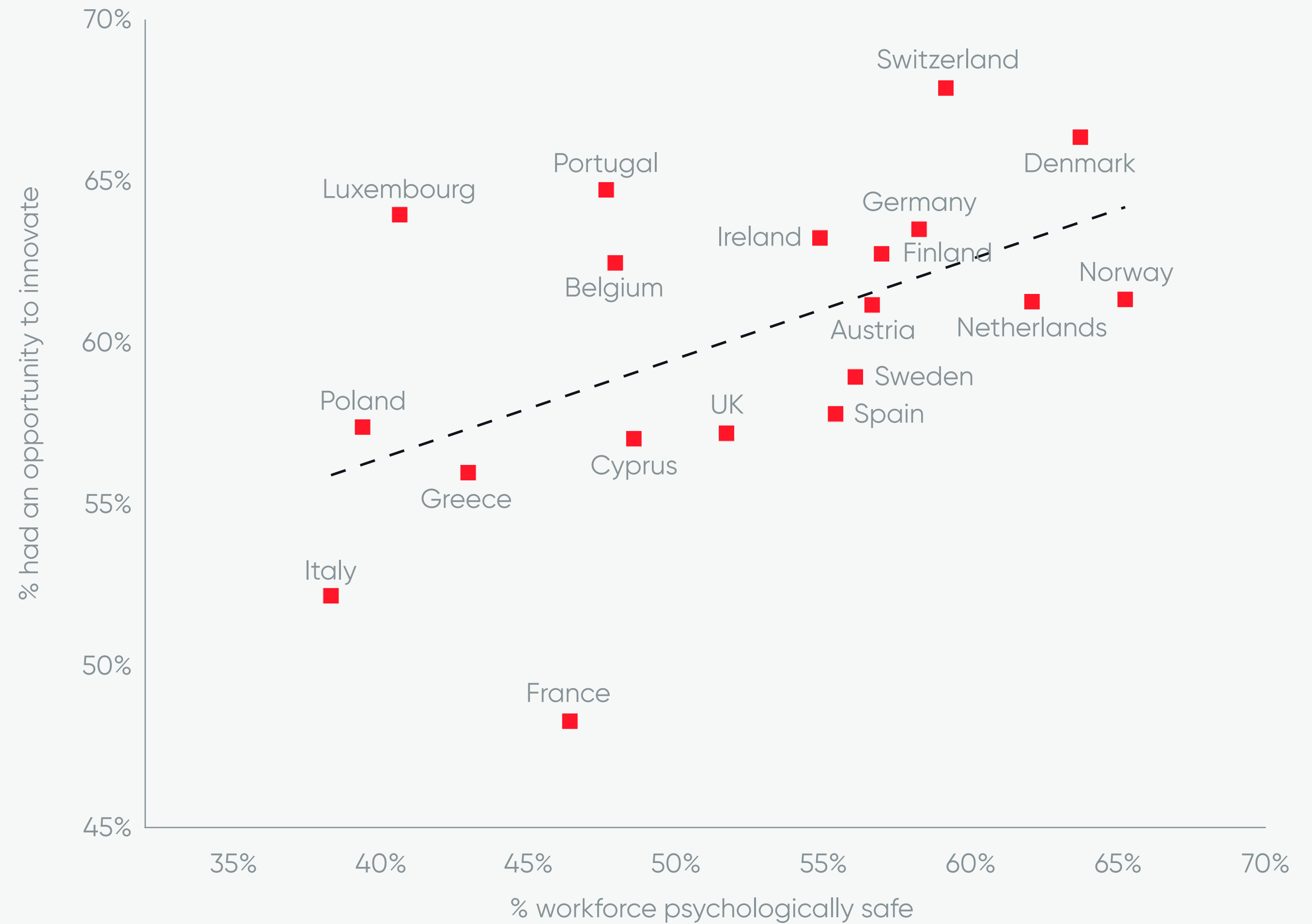
% workforce who had opportunities to develop new things and do things better



Wide differences in psychological safety and innovation across Europe

Northern Europe leads, while Southern Europe, particularly France and Italy, lags behind

Link between psychological safety and innovation



Psychological safety leads to better business outcomes

Customer satisfaction more than doubles in organisations where employees feel psychologically safe

! INSIGHT

Psychological safety greatly impacts employee retention. More than 8 in 10 employees in psychologically safe organisations want to continue working there.

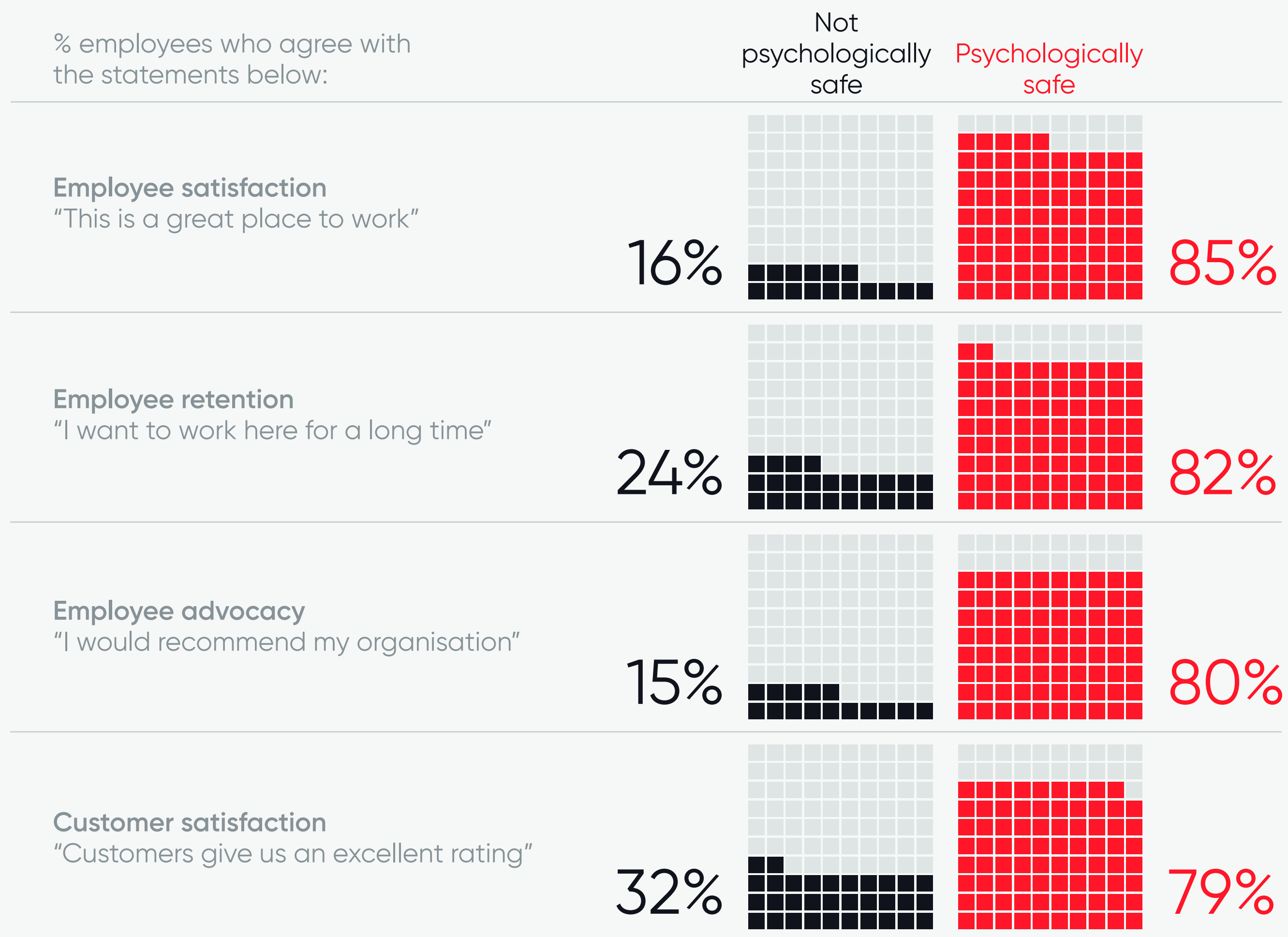
📄 EXPLAINER

Psychological safety is a state which organisations achieve. Trust and proximity skills are the means of achieving it.

⚙️ METHODOLOGY

Psychologically safe workplaces are those where employees agree with the statement "This is a psychologically and emotionally healthy place to work". Where employees disagree are not psychologically safe.

Comparison between those who feel psychologically safe and those who don't feel psychologically safe



High-trust leadership and proximity skills are essential for achieving psychological safety

Leaders who embody trust and empower employees are better at fostering psychologically safe workplaces

EXPLAINER

“European Best Workplaces” is a blended benchmark combining data from 2024’s Fortune’s 100 Best Companies To Work For™ in Europe List makers (organisations with 500+ employees) and the 100 Best Small & Medium Workplaces in Europe™ List makers (50–499 employees).





European Workforce Study 2025

APPENDIX 01

Country indicators



Country rankings on business outcomes

Based on the average %

⚙️ METHODOLOGY

The ranking is based on the average % scores for employee satisfaction, employee retention, employee advocacy and customer satisfaction.

Rank



Country rankings on leadership skills

Based on the average %

⚙️ METHODOLOGY

The ranking is based on the average % scores for high-trust leadership, proximity leadership skills and psychological safety.

Rank



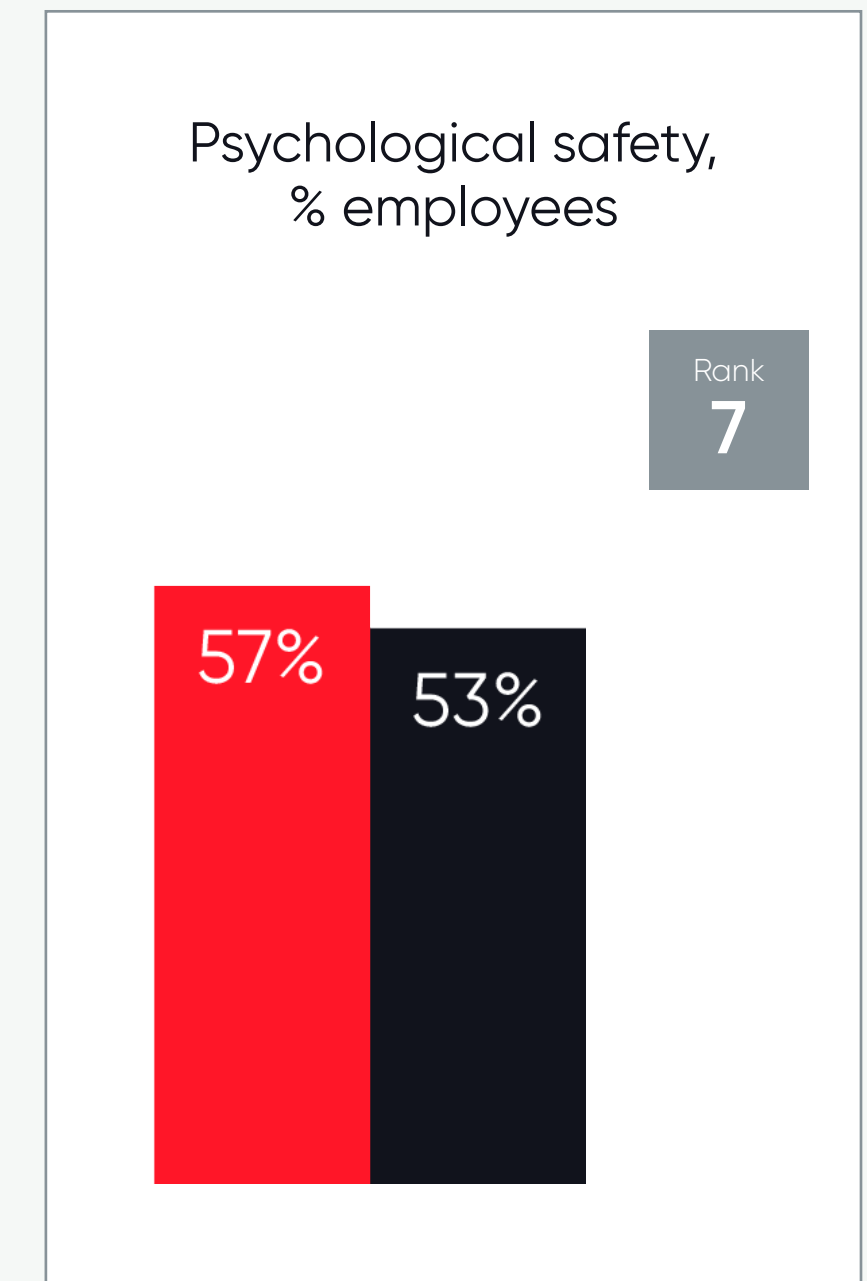
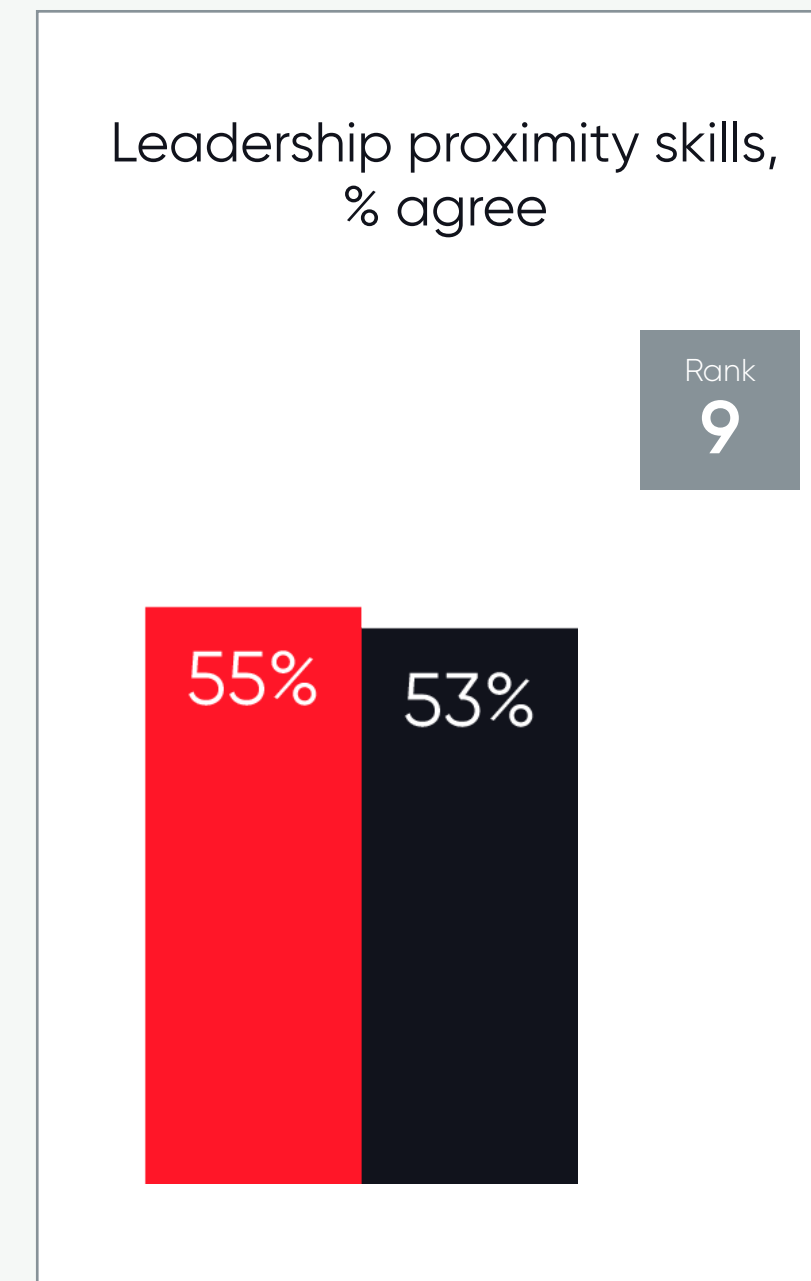
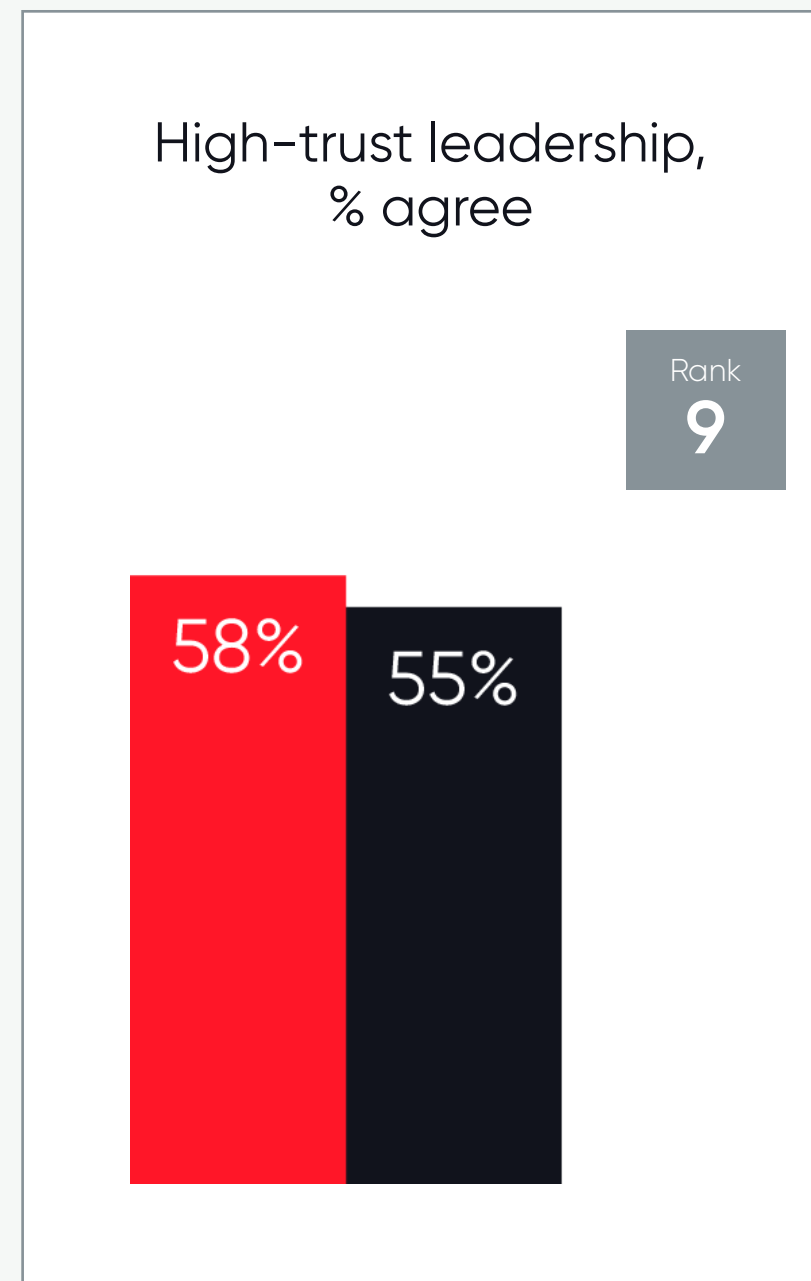
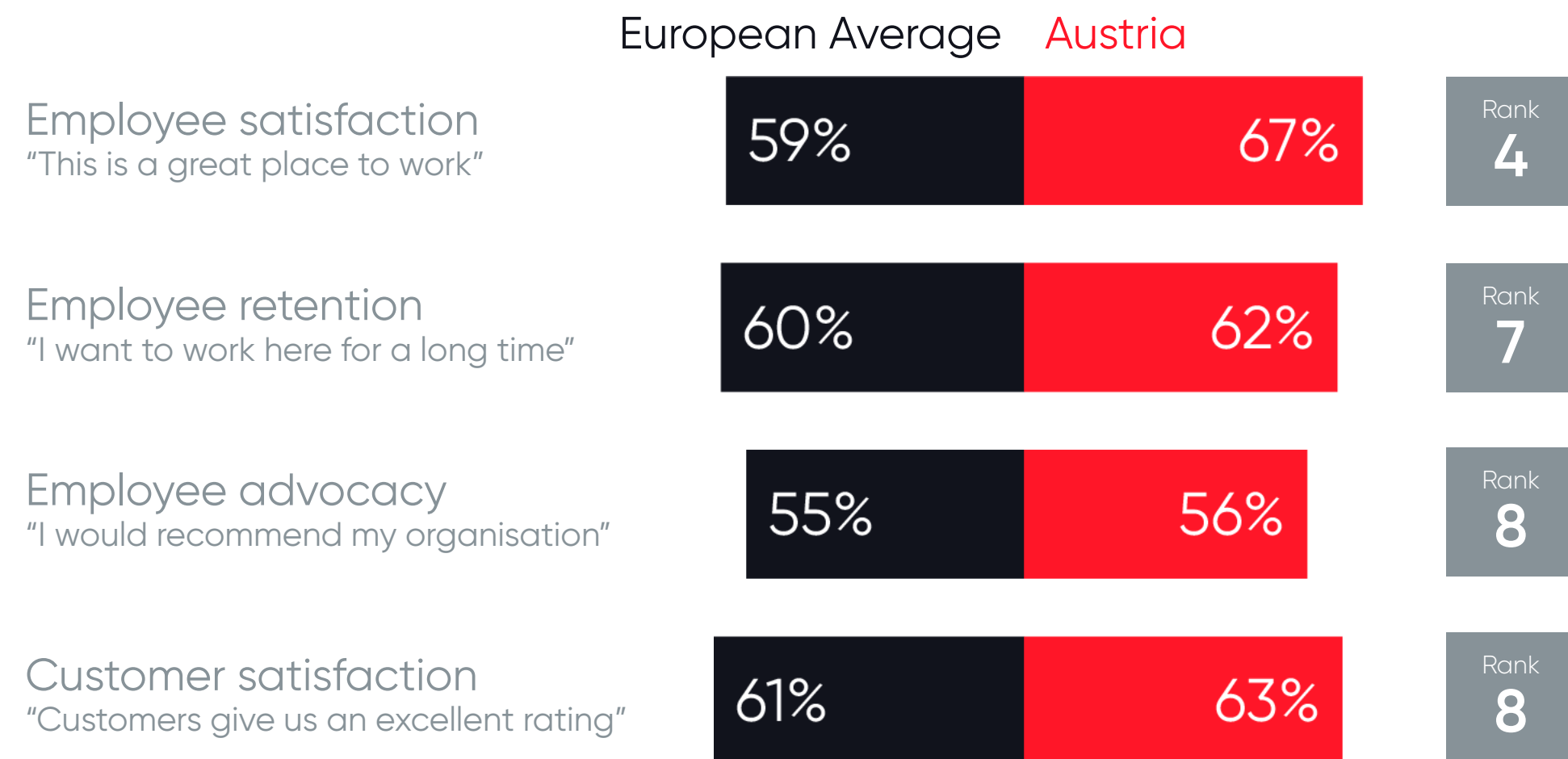
FOCUS ON

Austria



■ Austria
■ European Average

Business outcomes



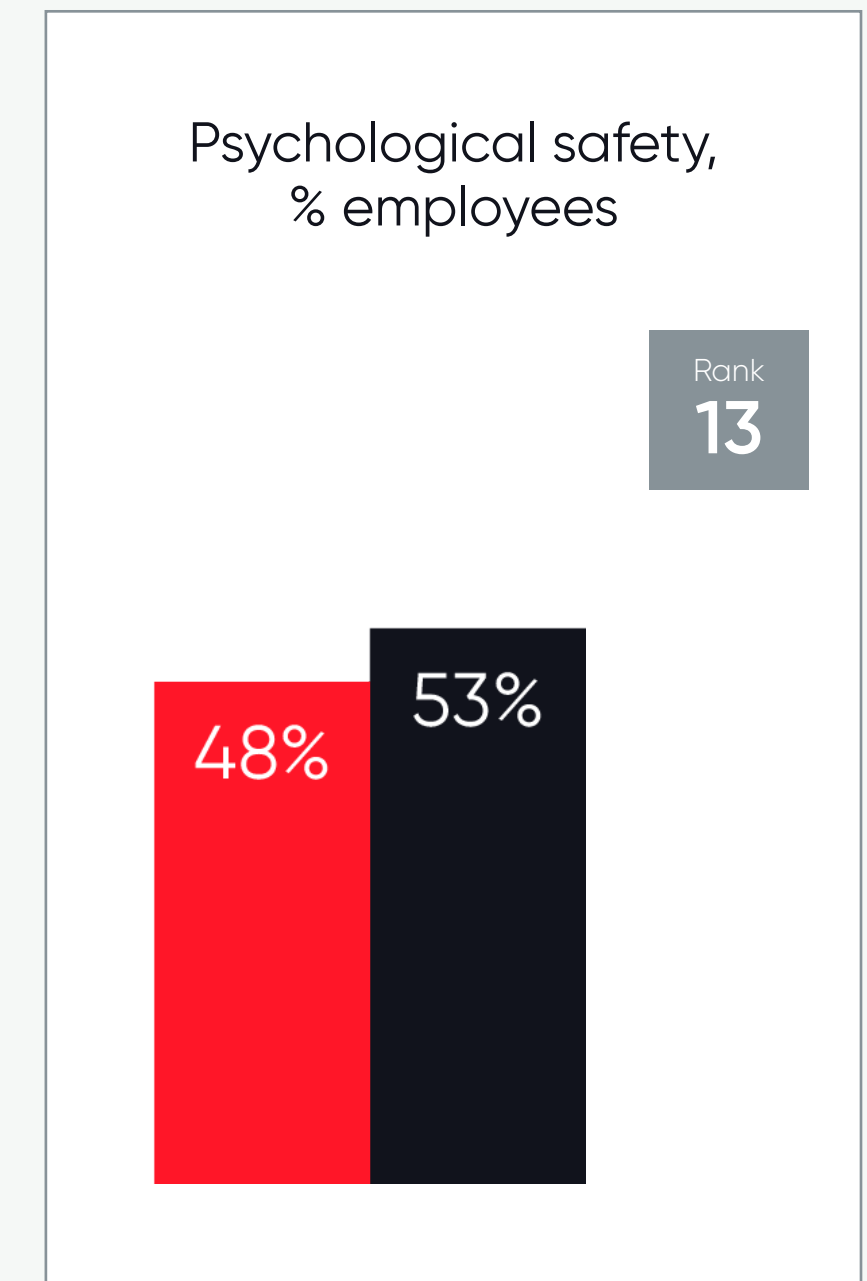
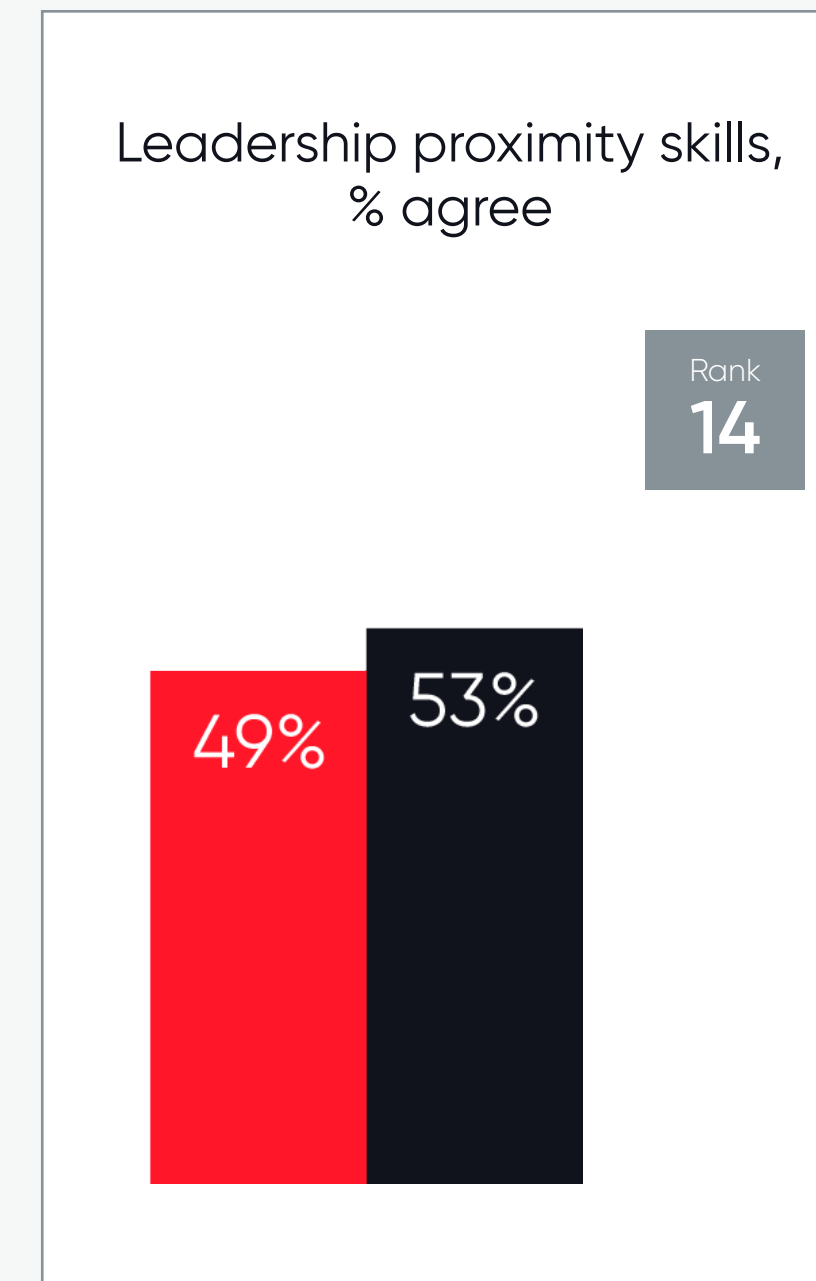
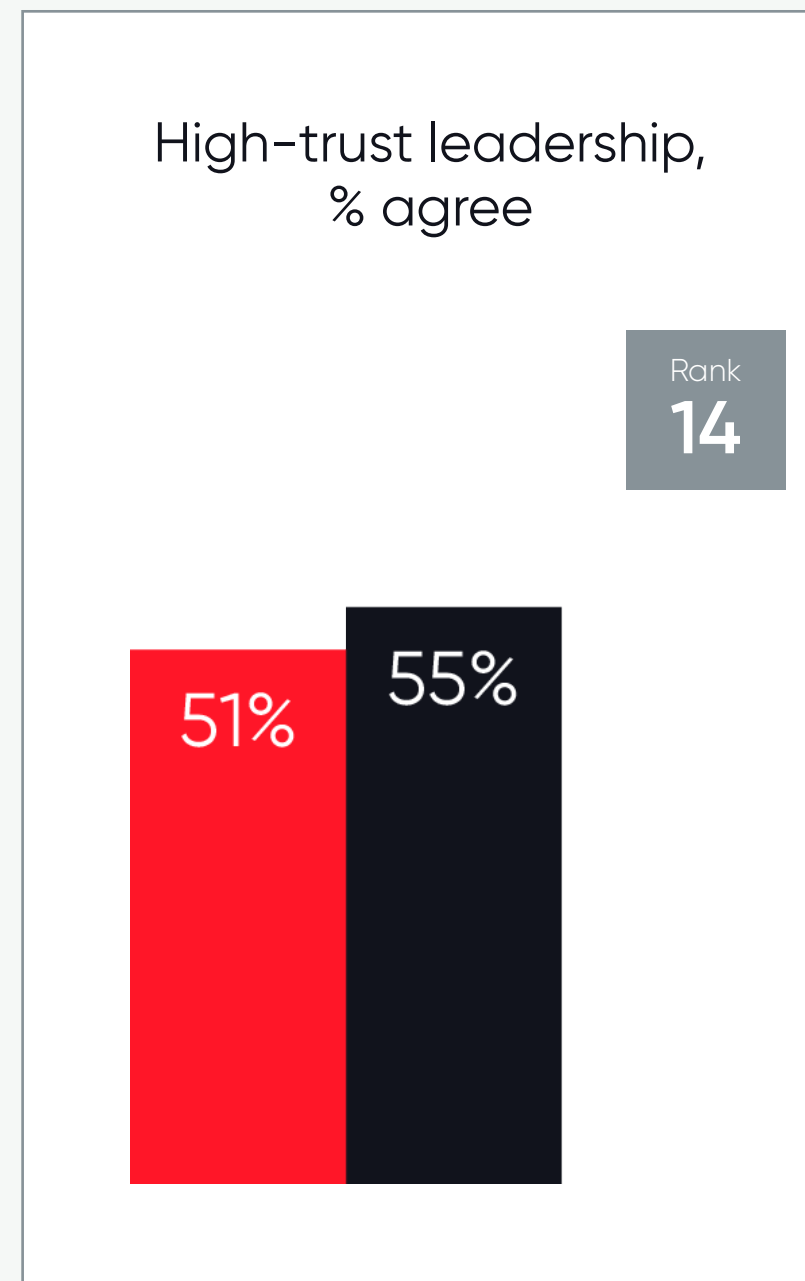
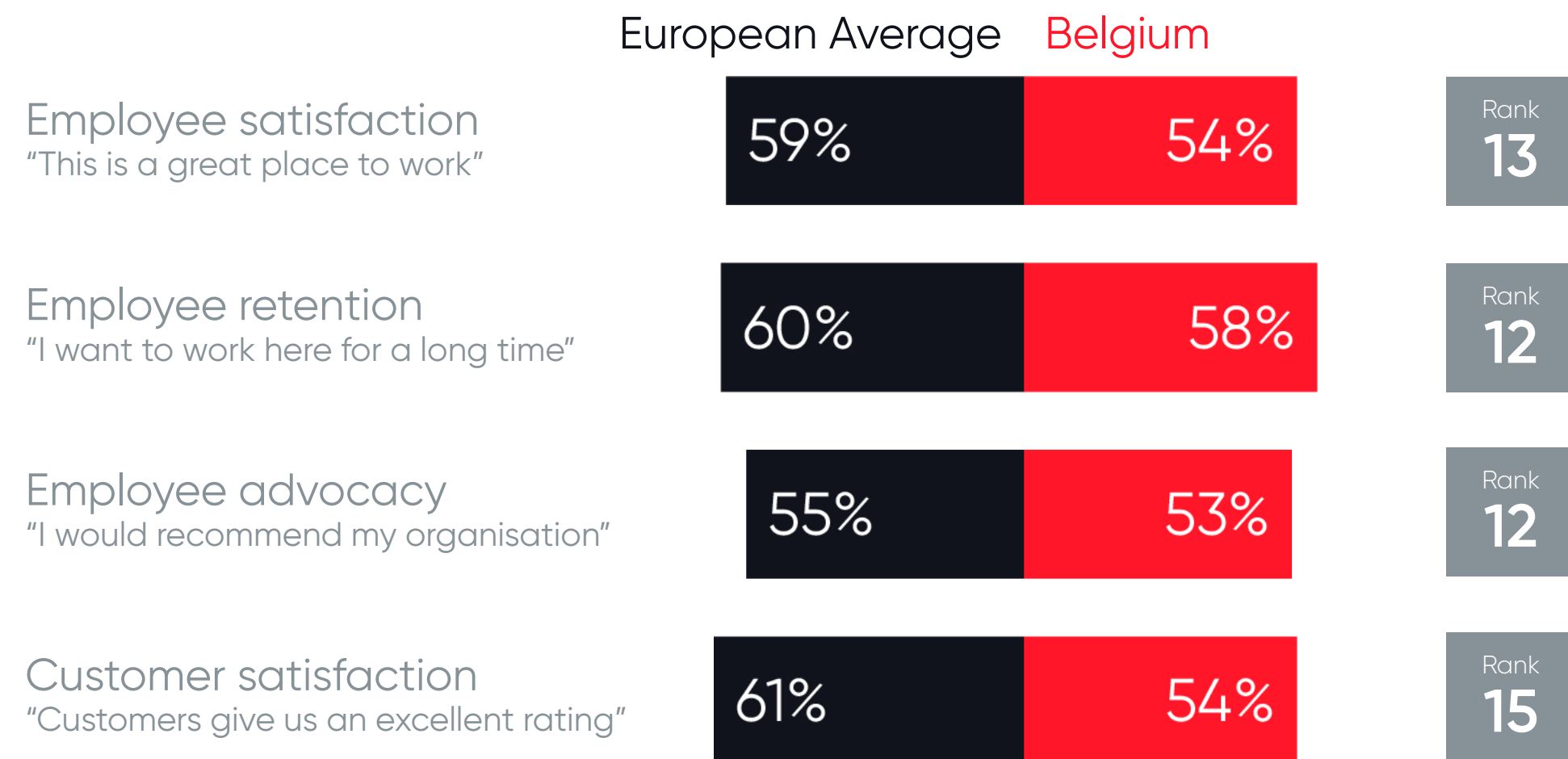
Rank is out of 20 countries

FOCUS ON
Belgium



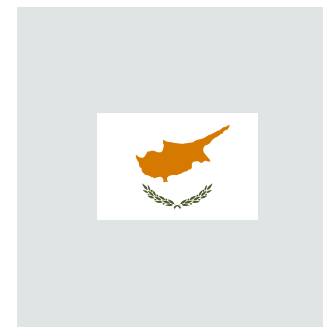
■ Belgium
■ European Average

Business outcomes



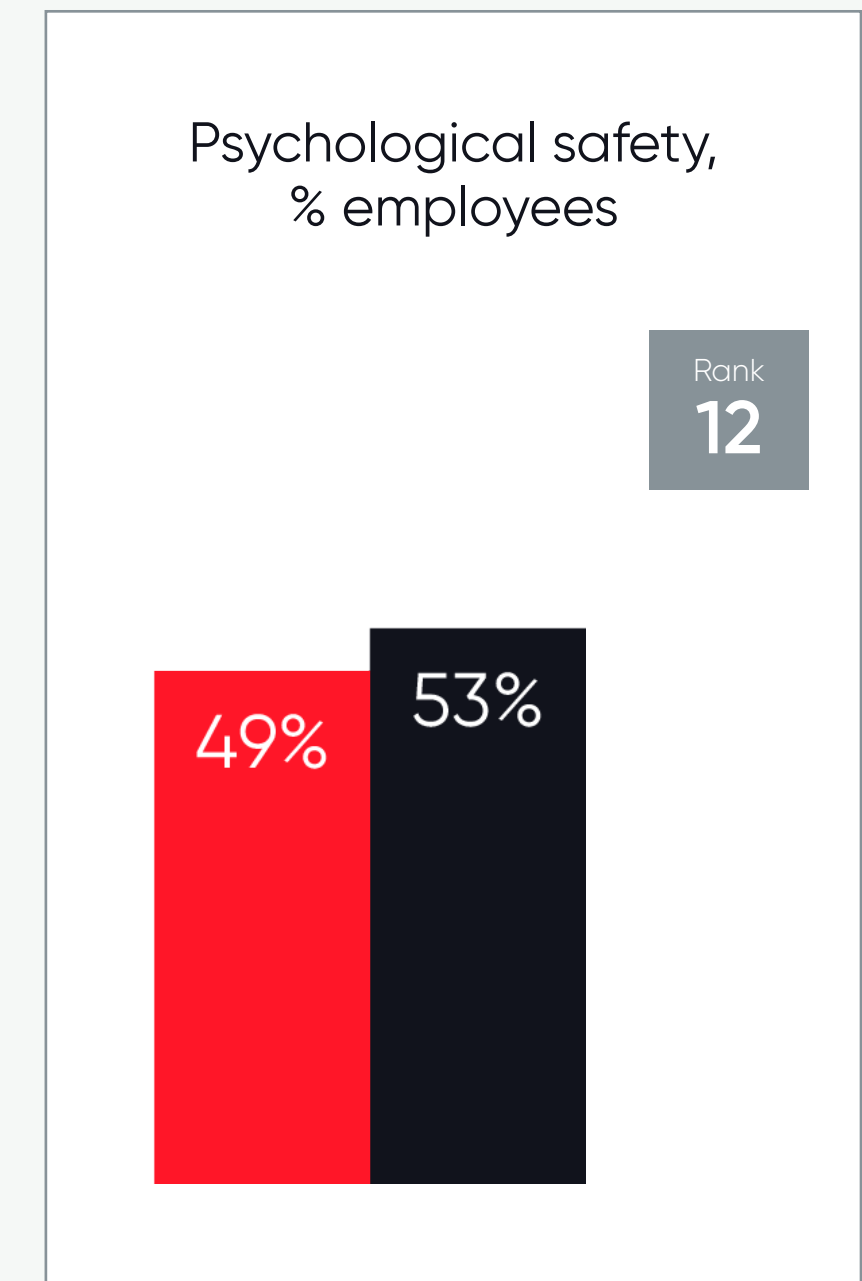
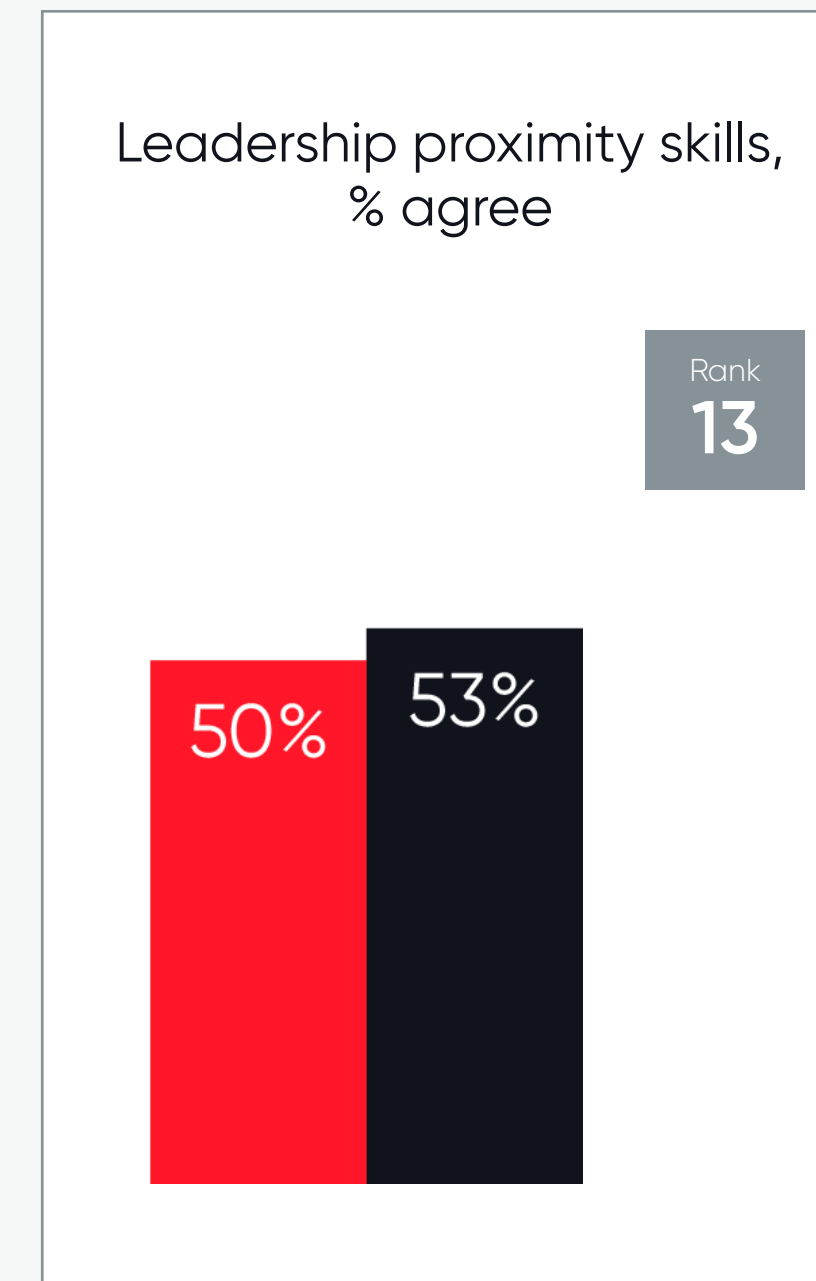
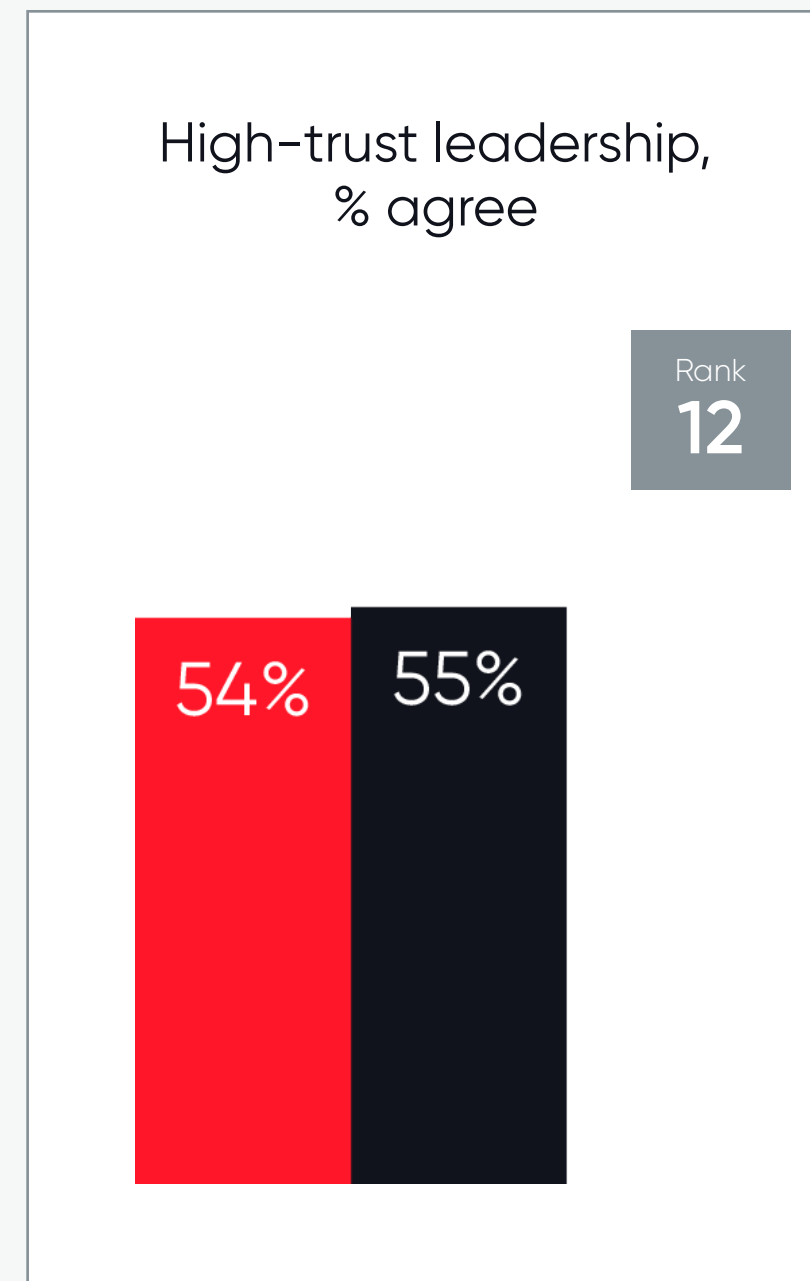
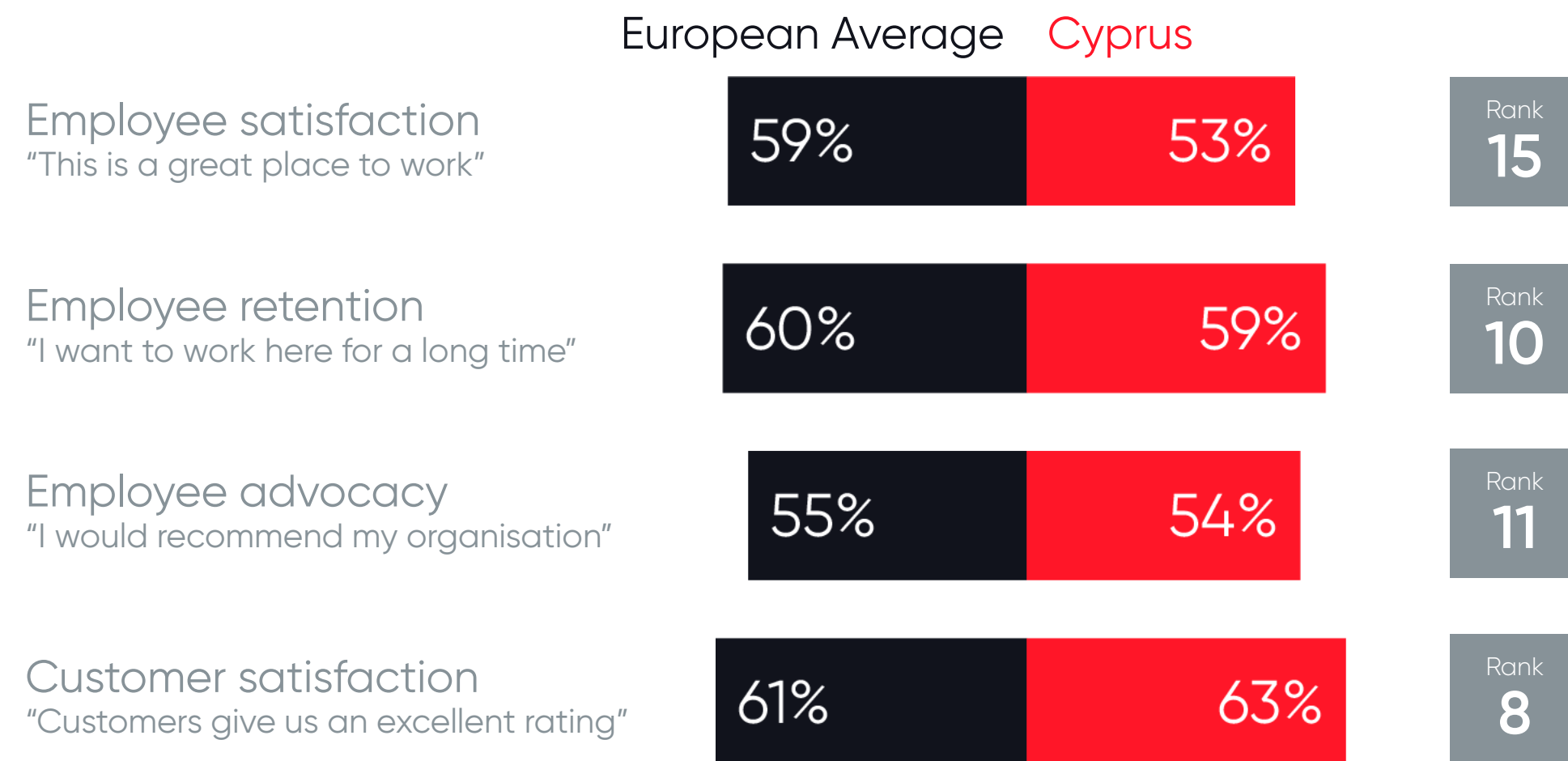
Rank is out of 20 countries

FOCUS ON
Cyprus



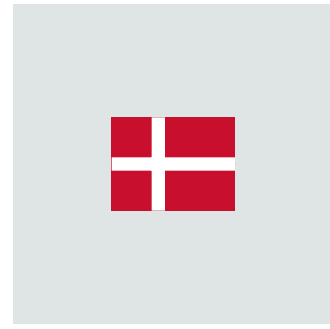
■ Cyprus
■ European Average

Business outcomes



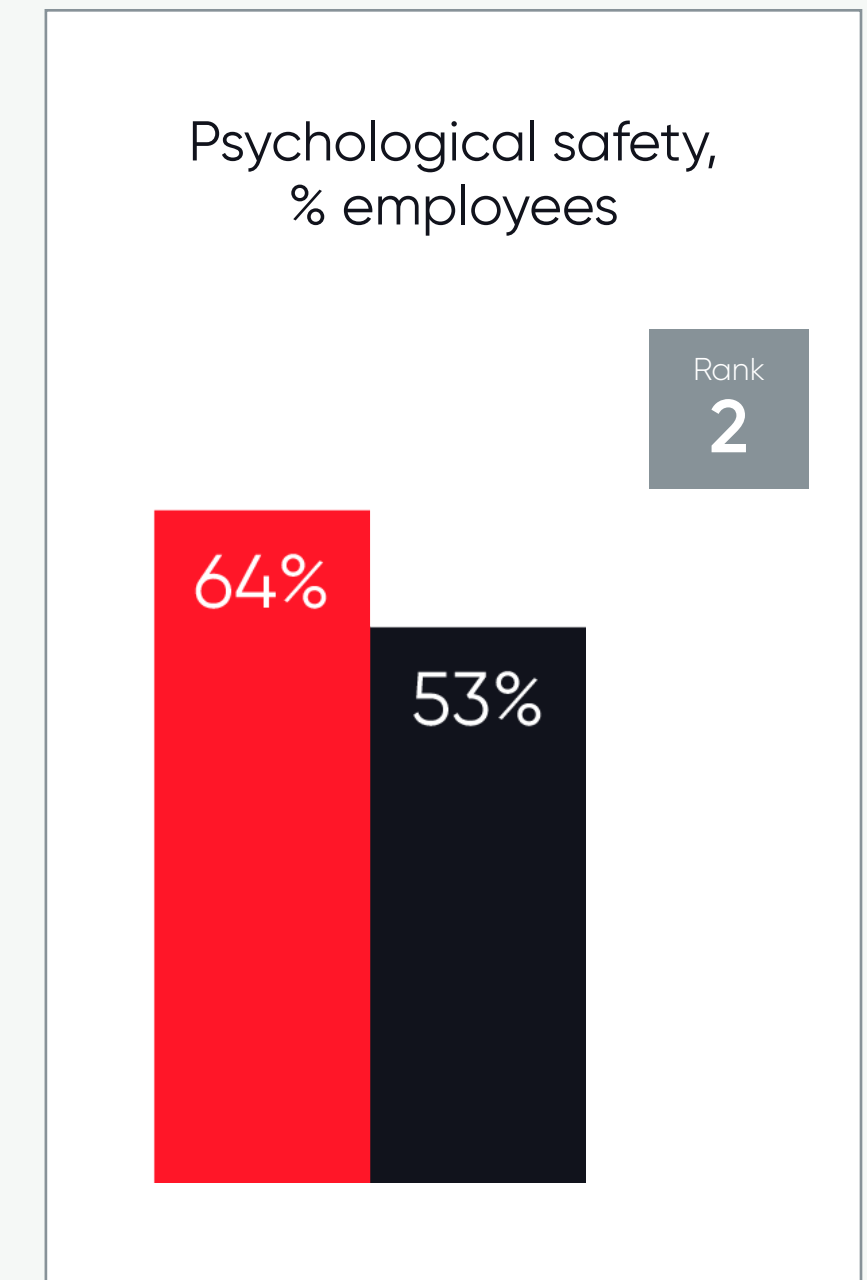
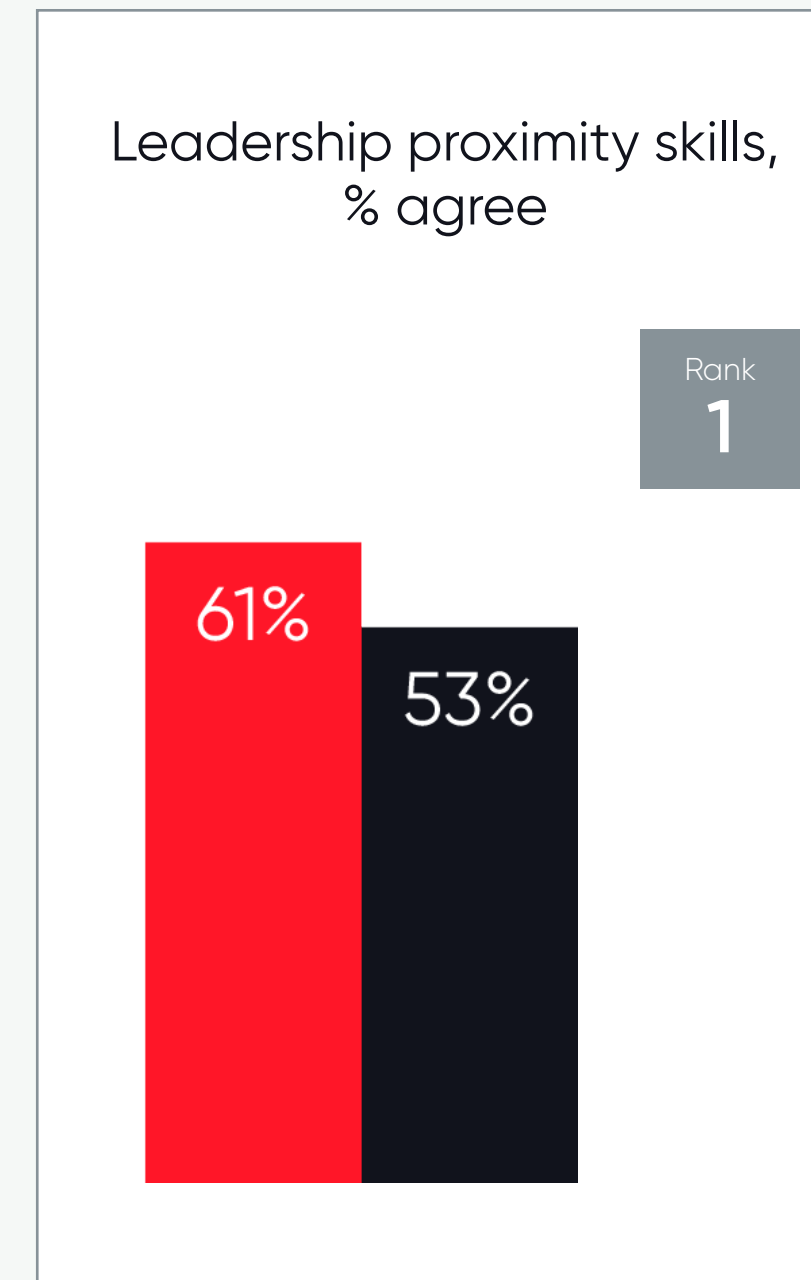
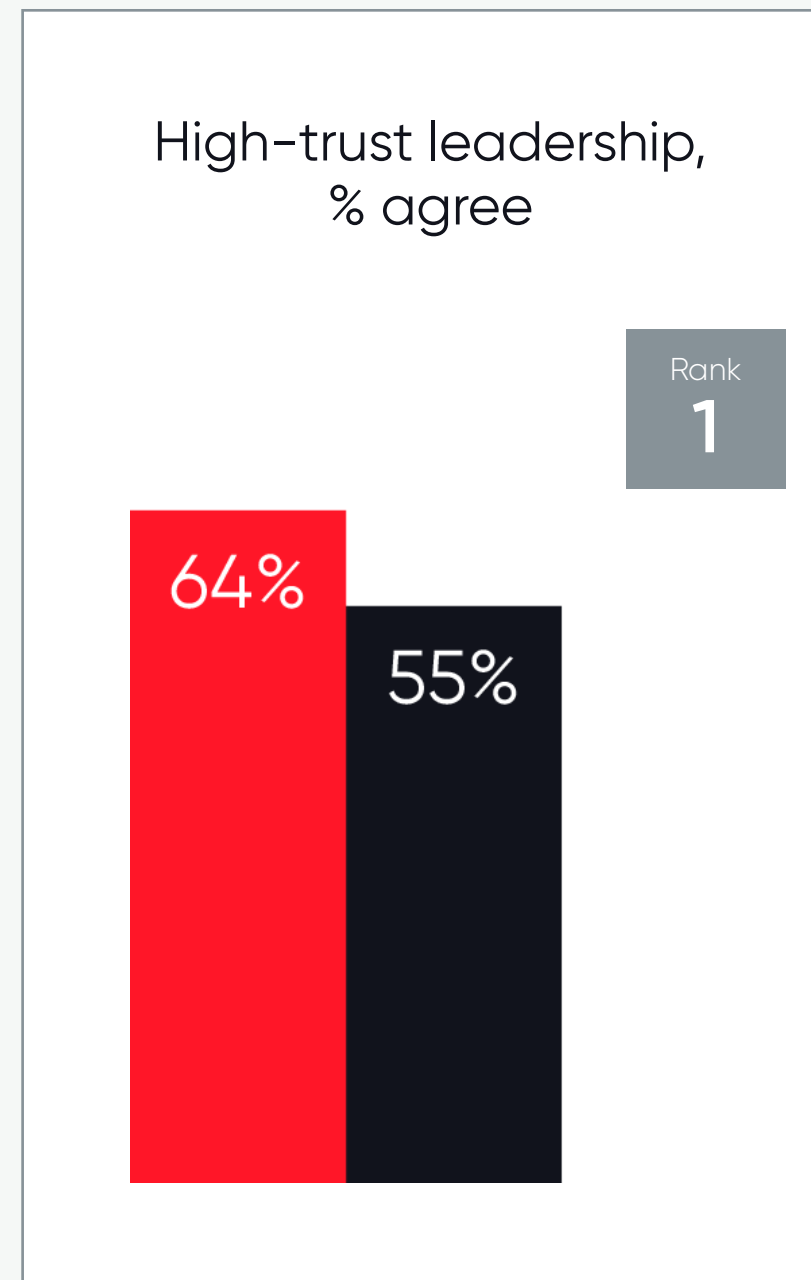
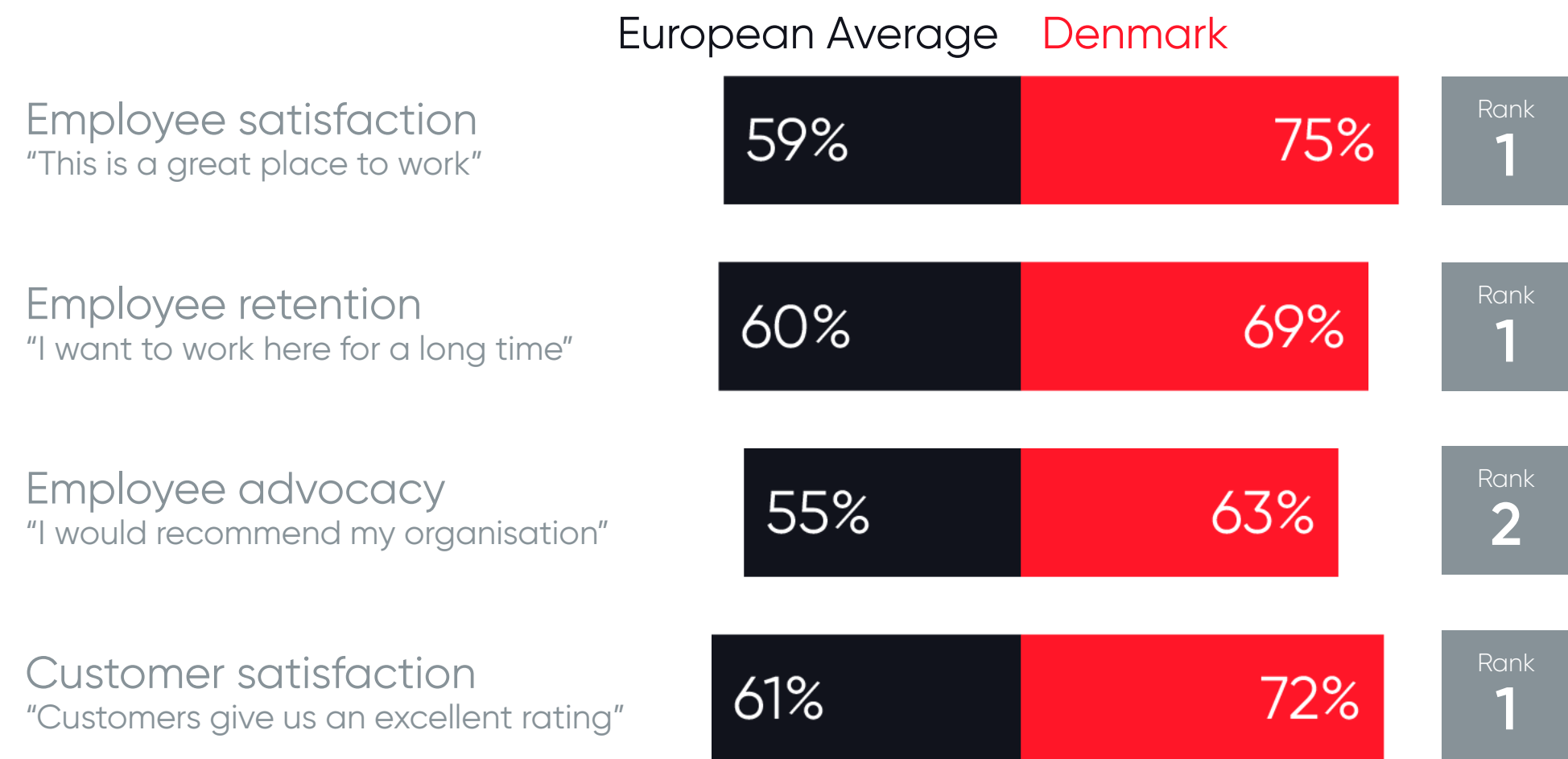
Rank is out of 20 countries

FOCUS ON
Denmark



■ Denmark
■ European Average

Business outcomes



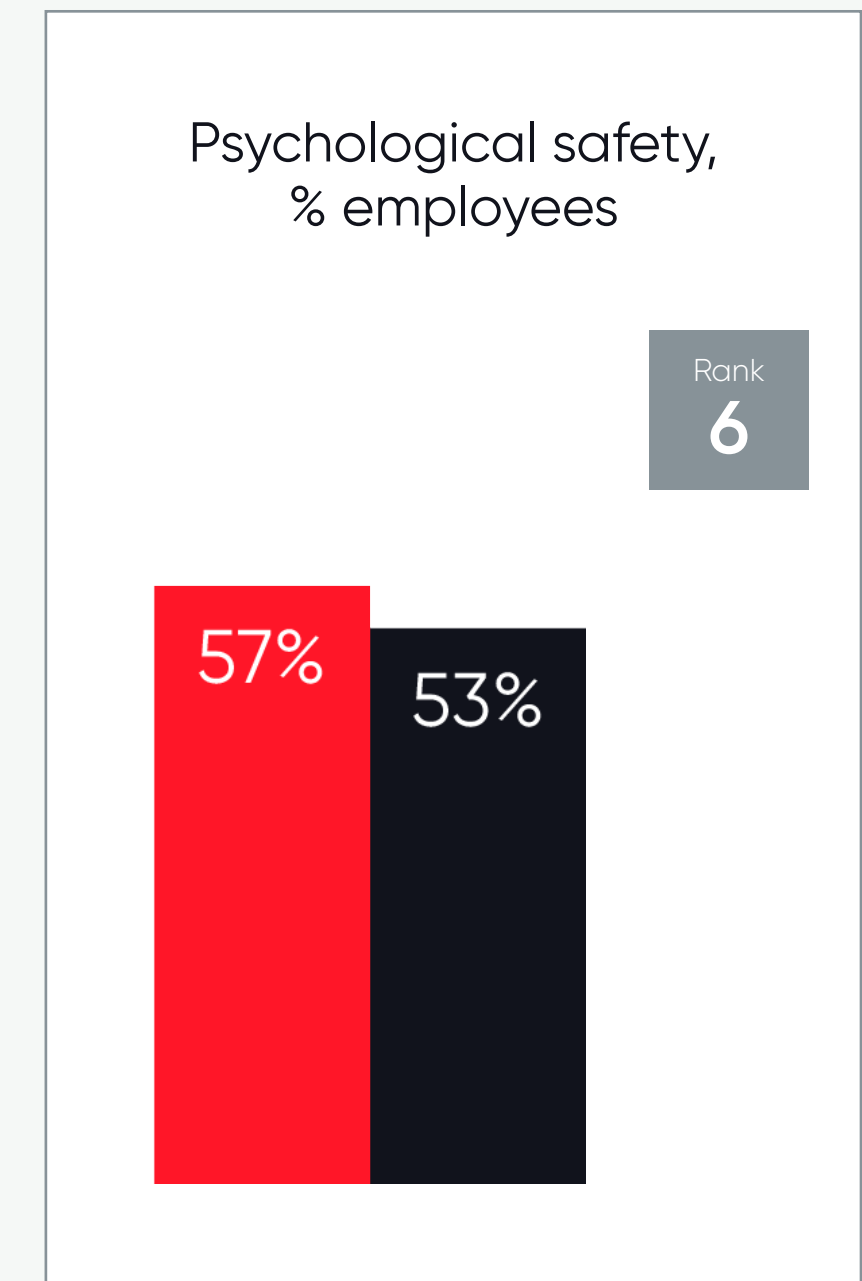
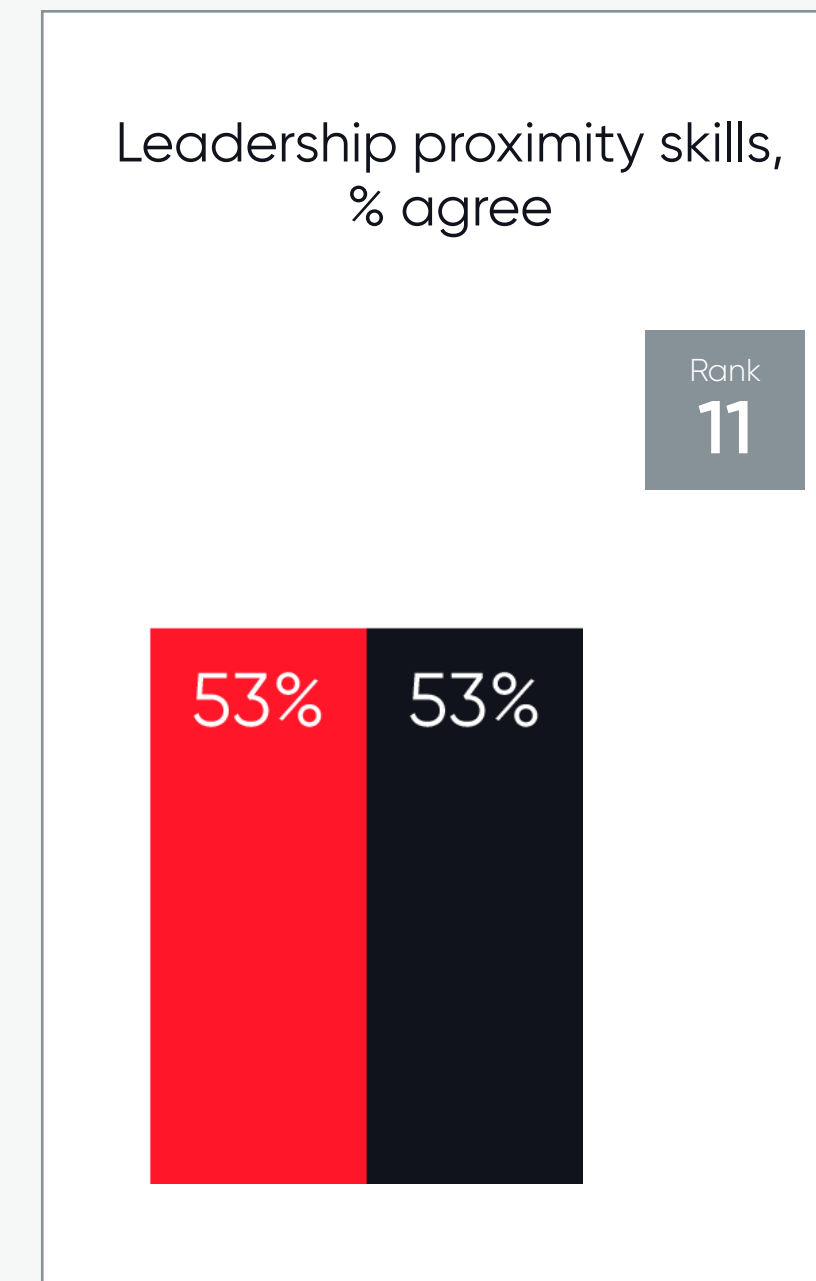
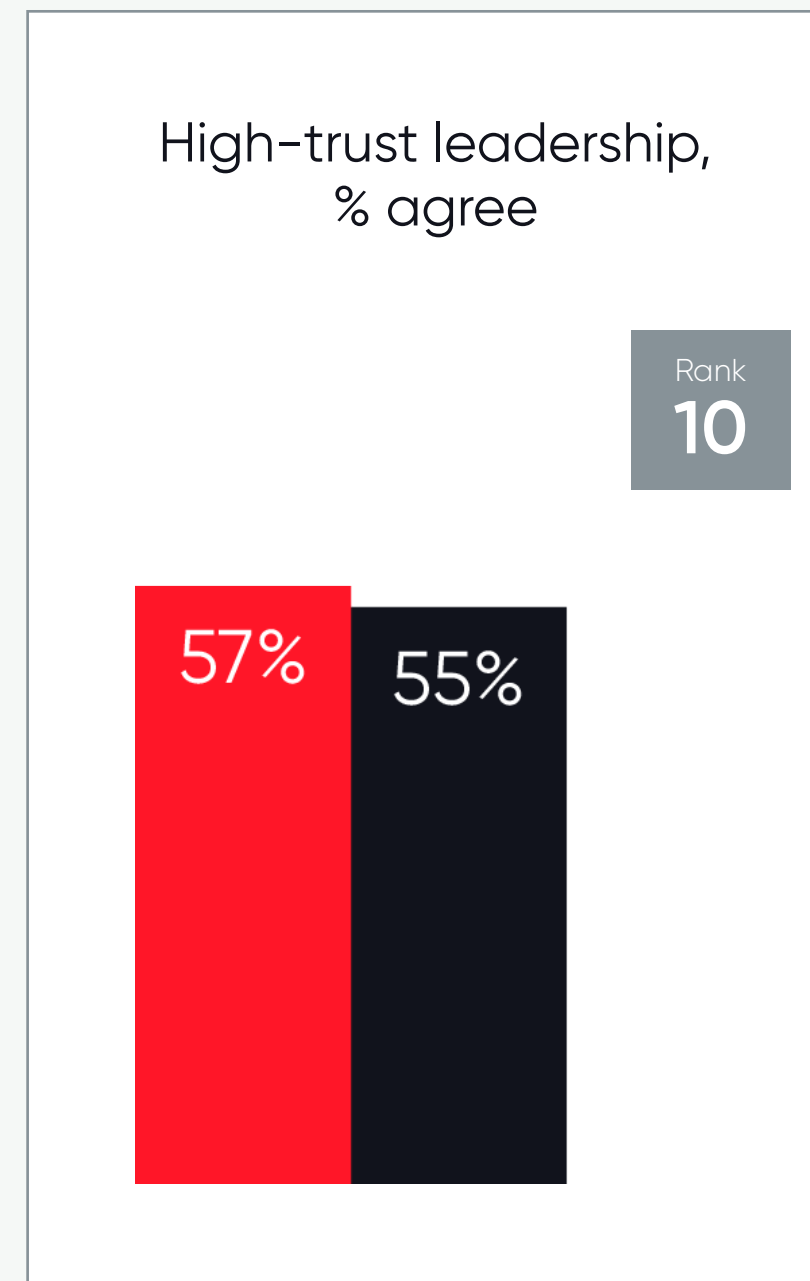
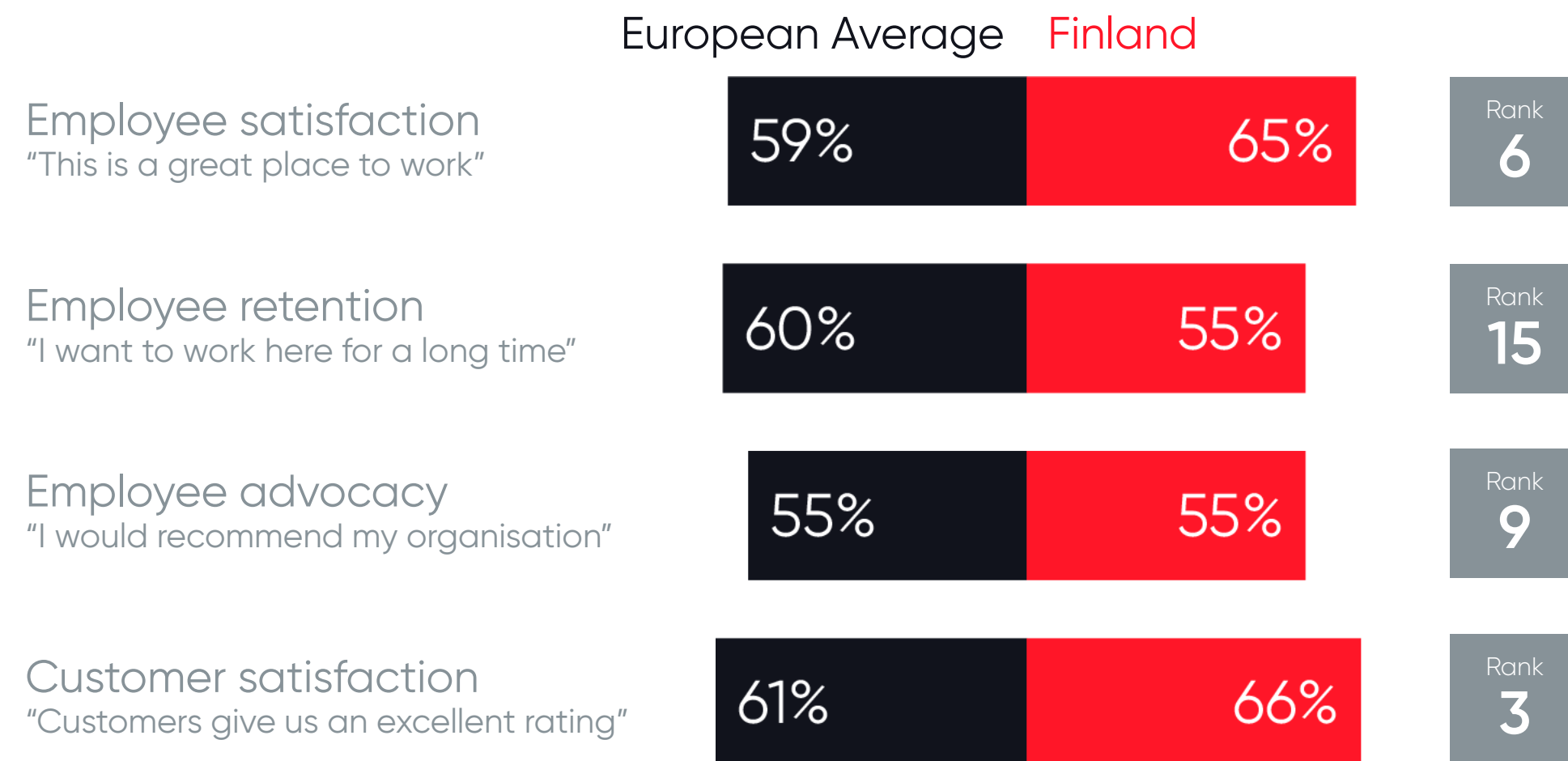
Rank is out of 20 countries

FOCUS ON
Finland



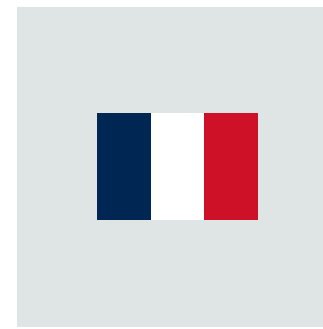
■ Finland
■ European Average

Business outcomes



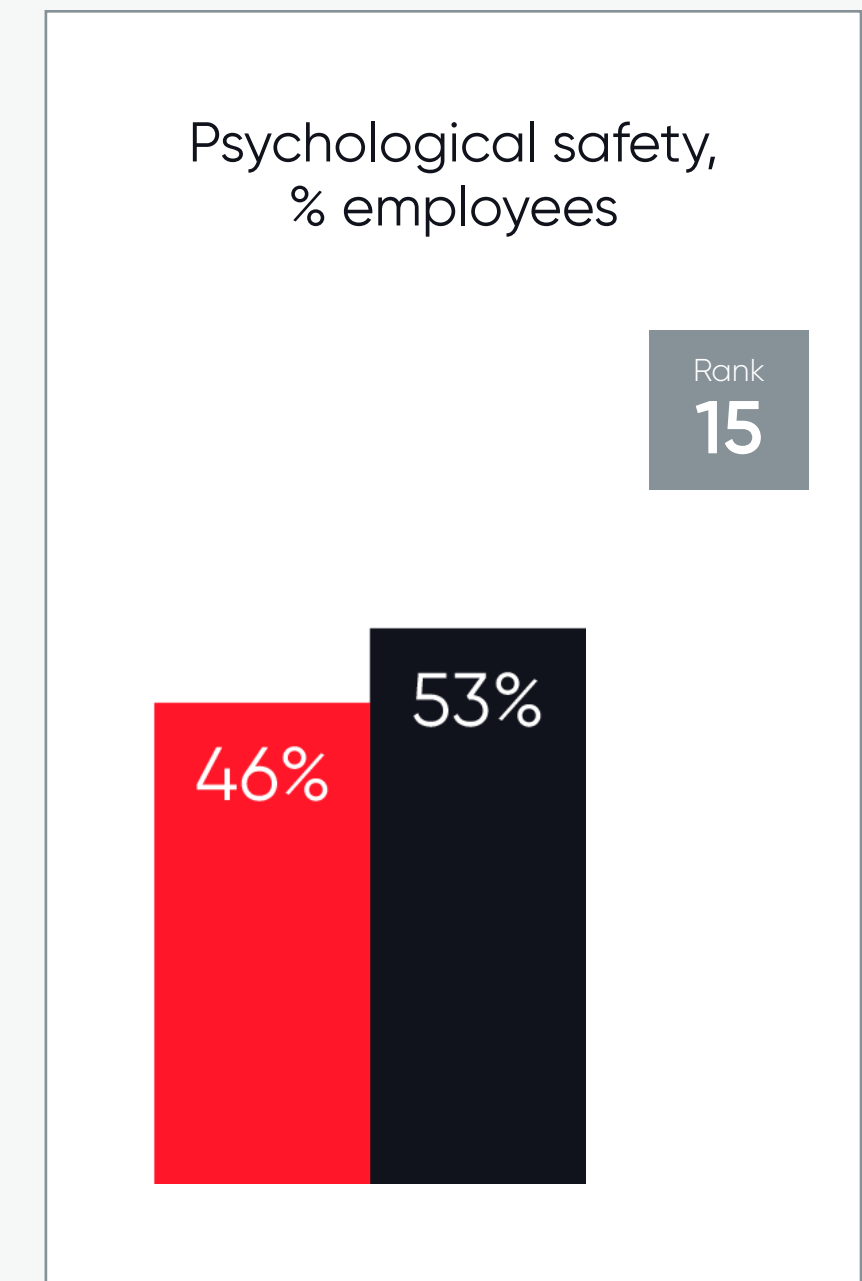
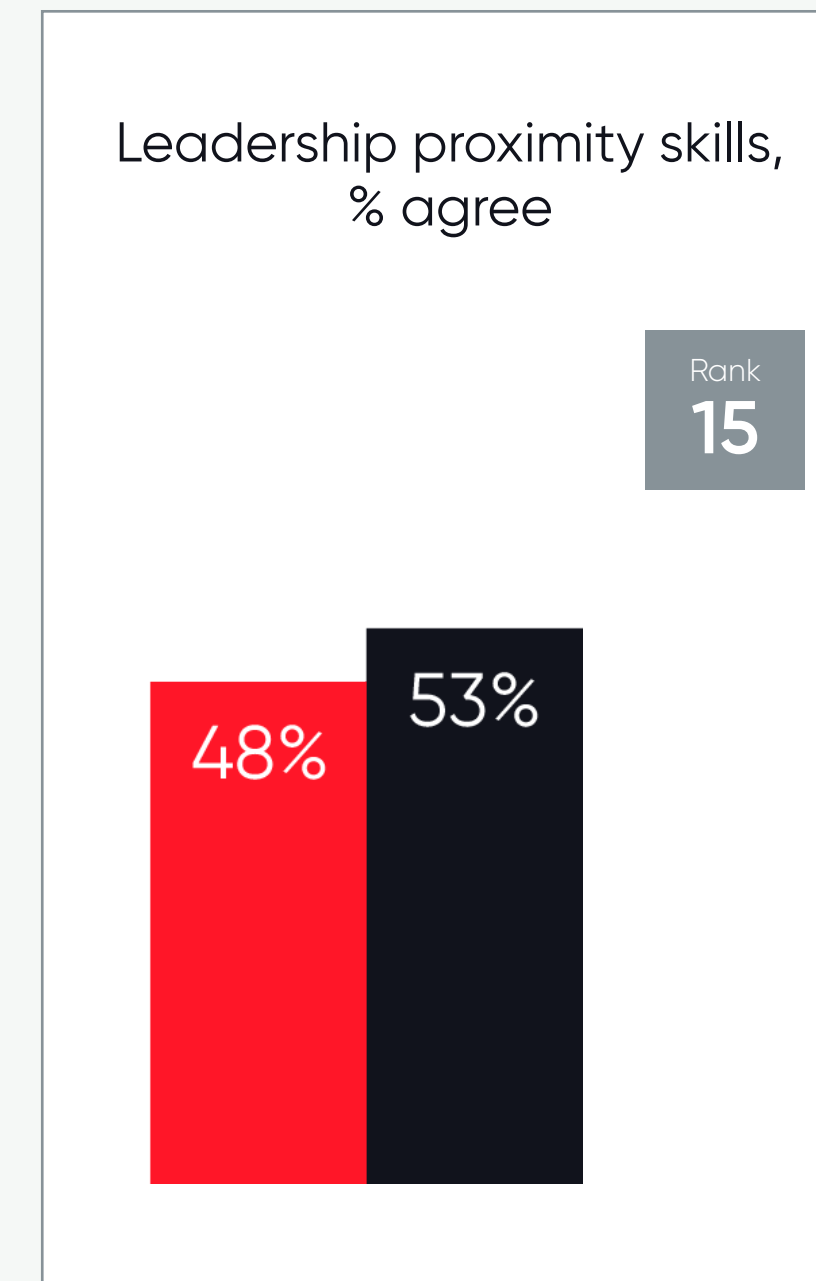
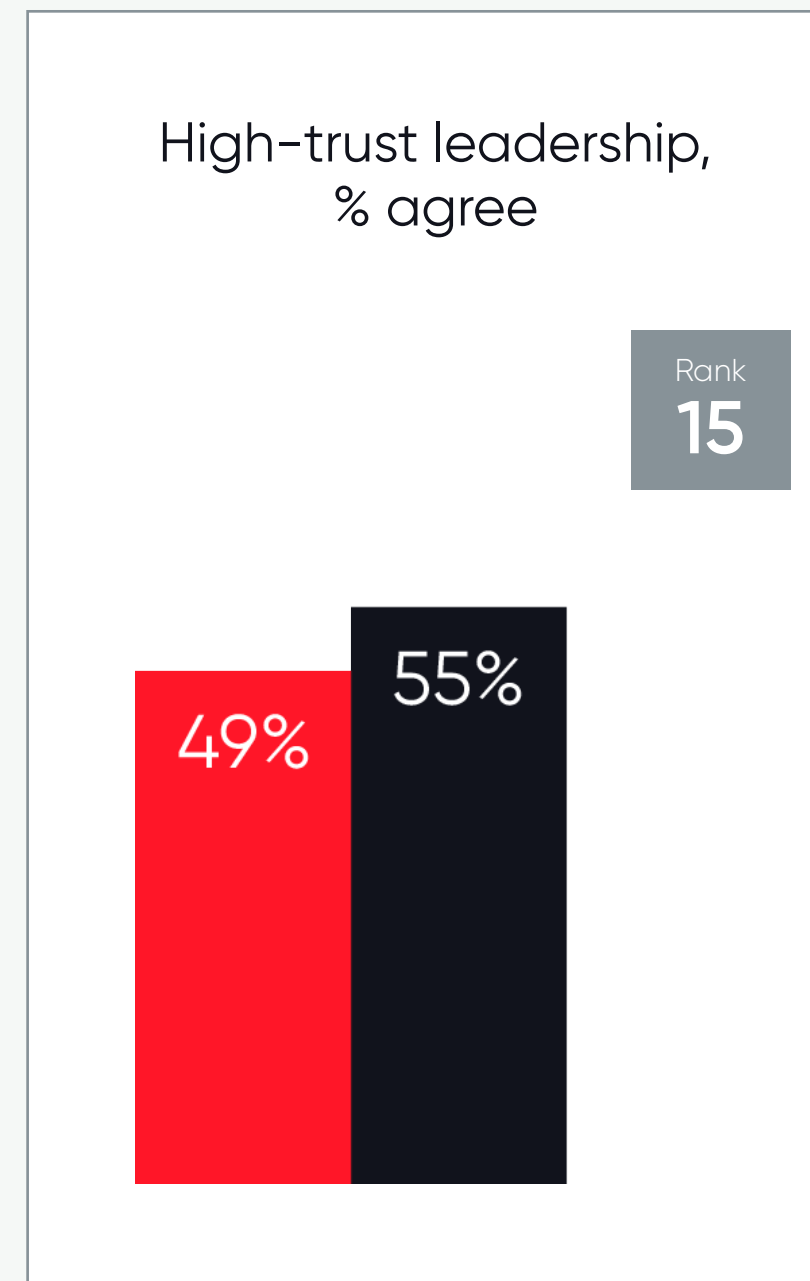
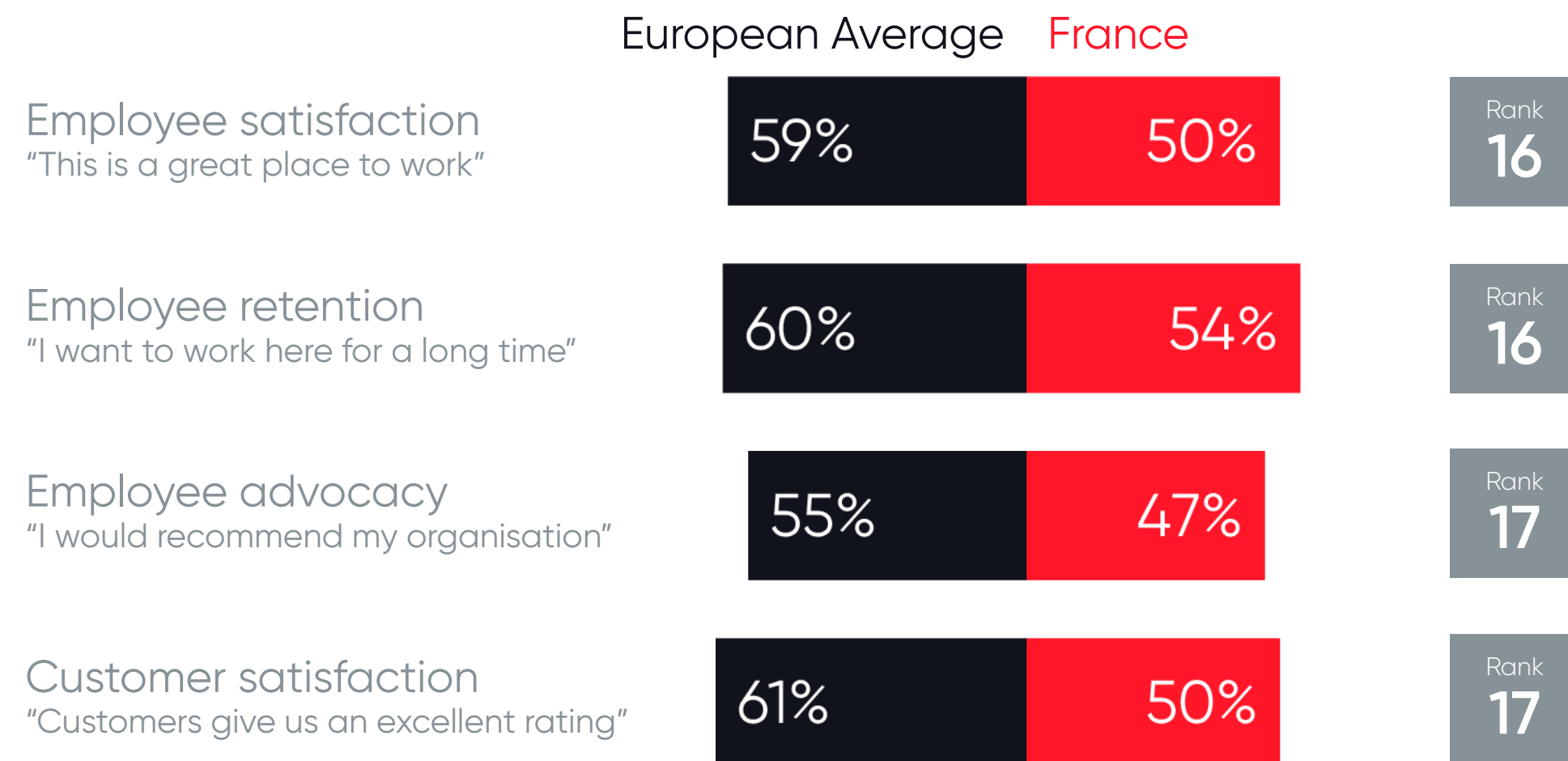
Rank is out of 20 countries

FOCUS ON
France



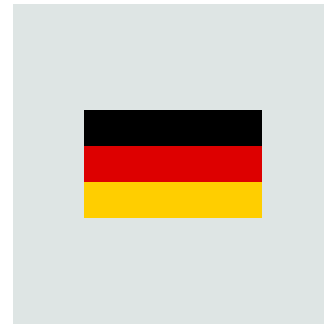
■ France
■ European Average

Business outcomes



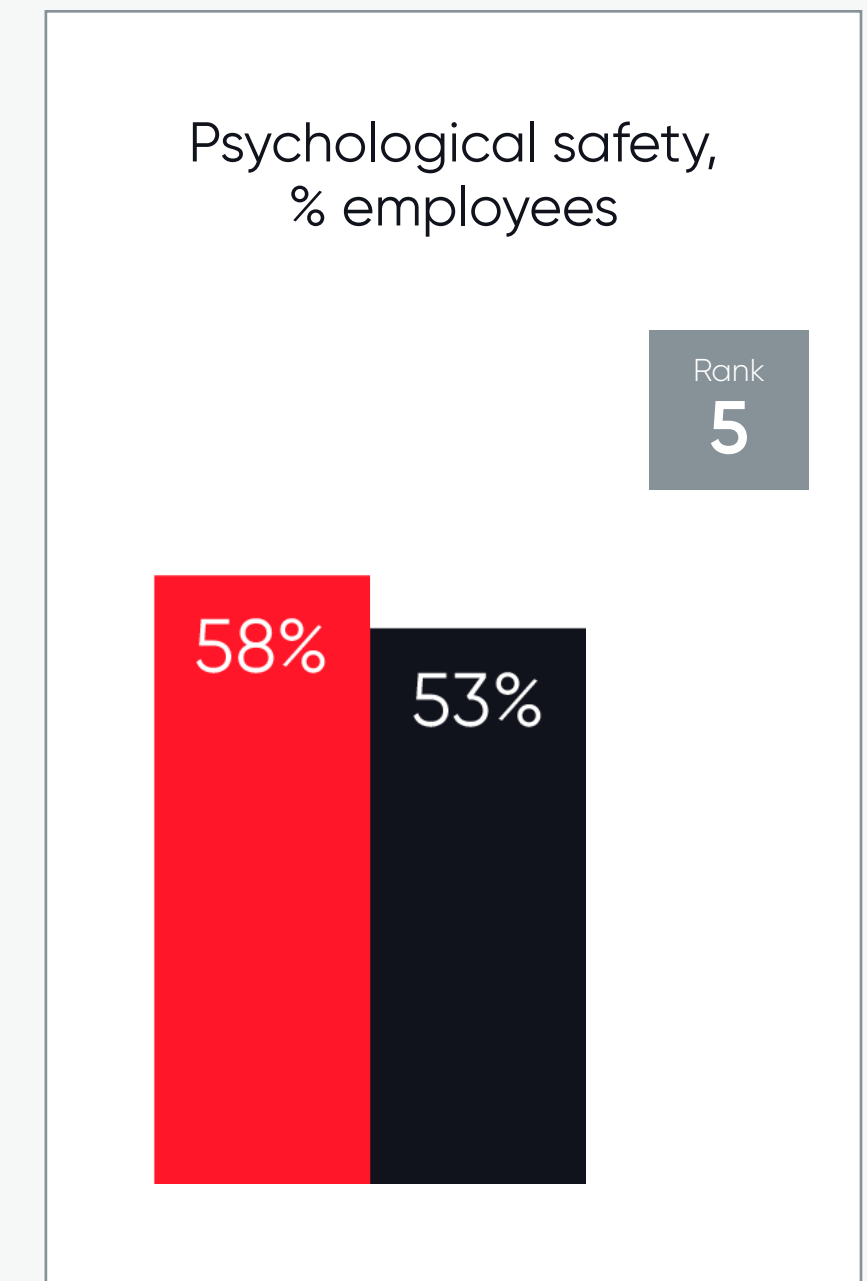
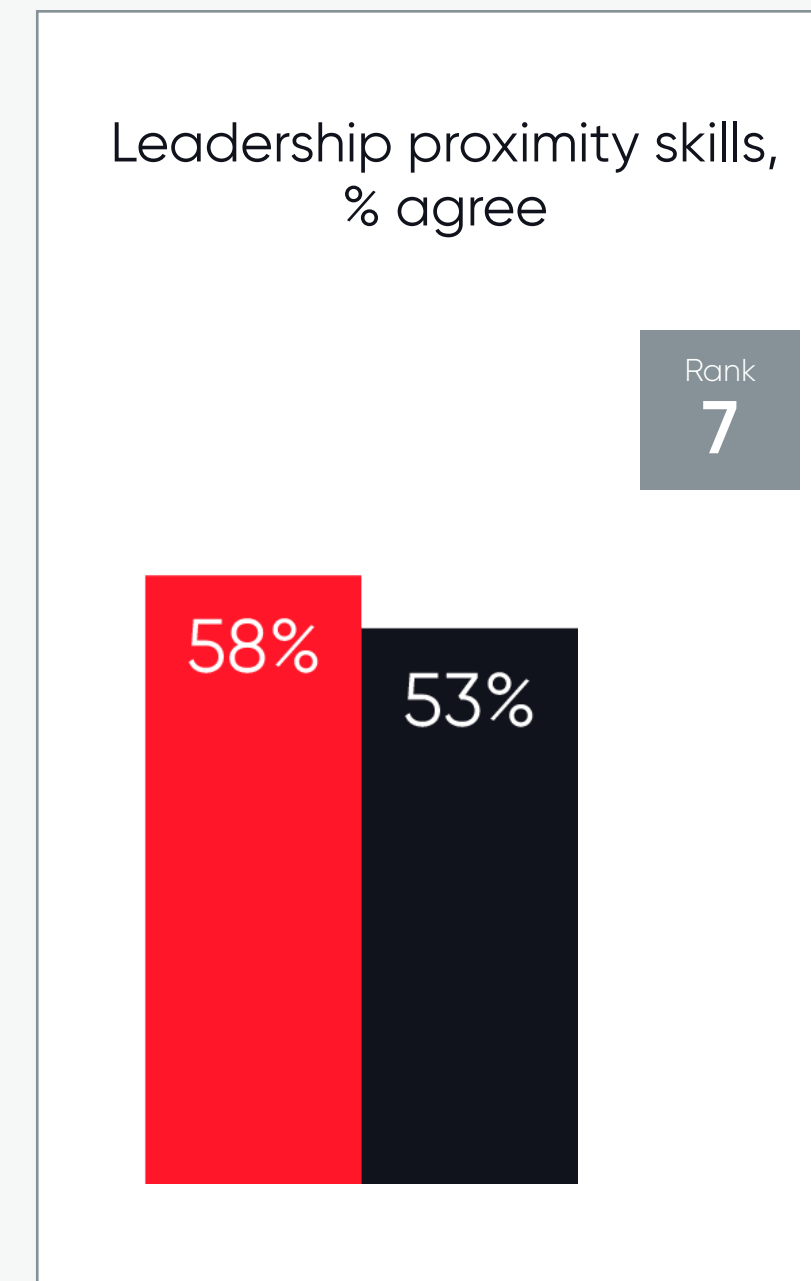
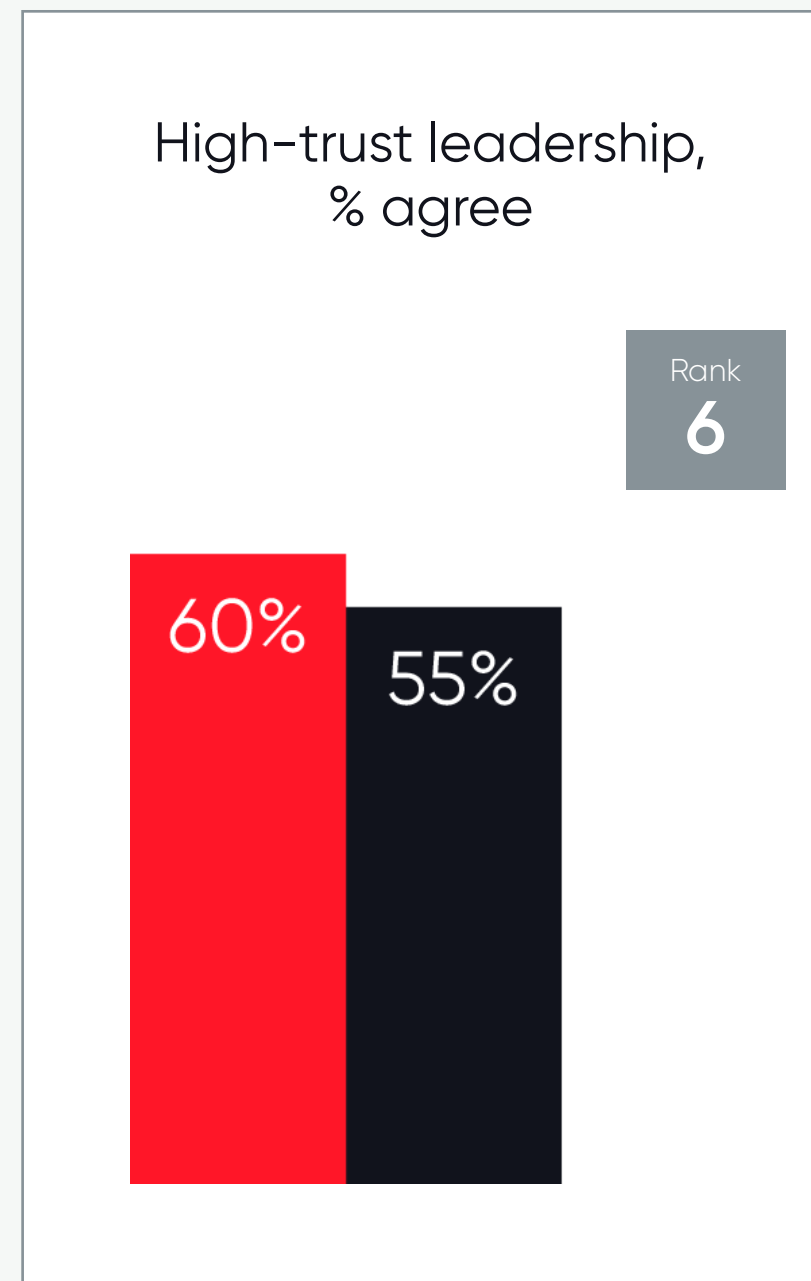
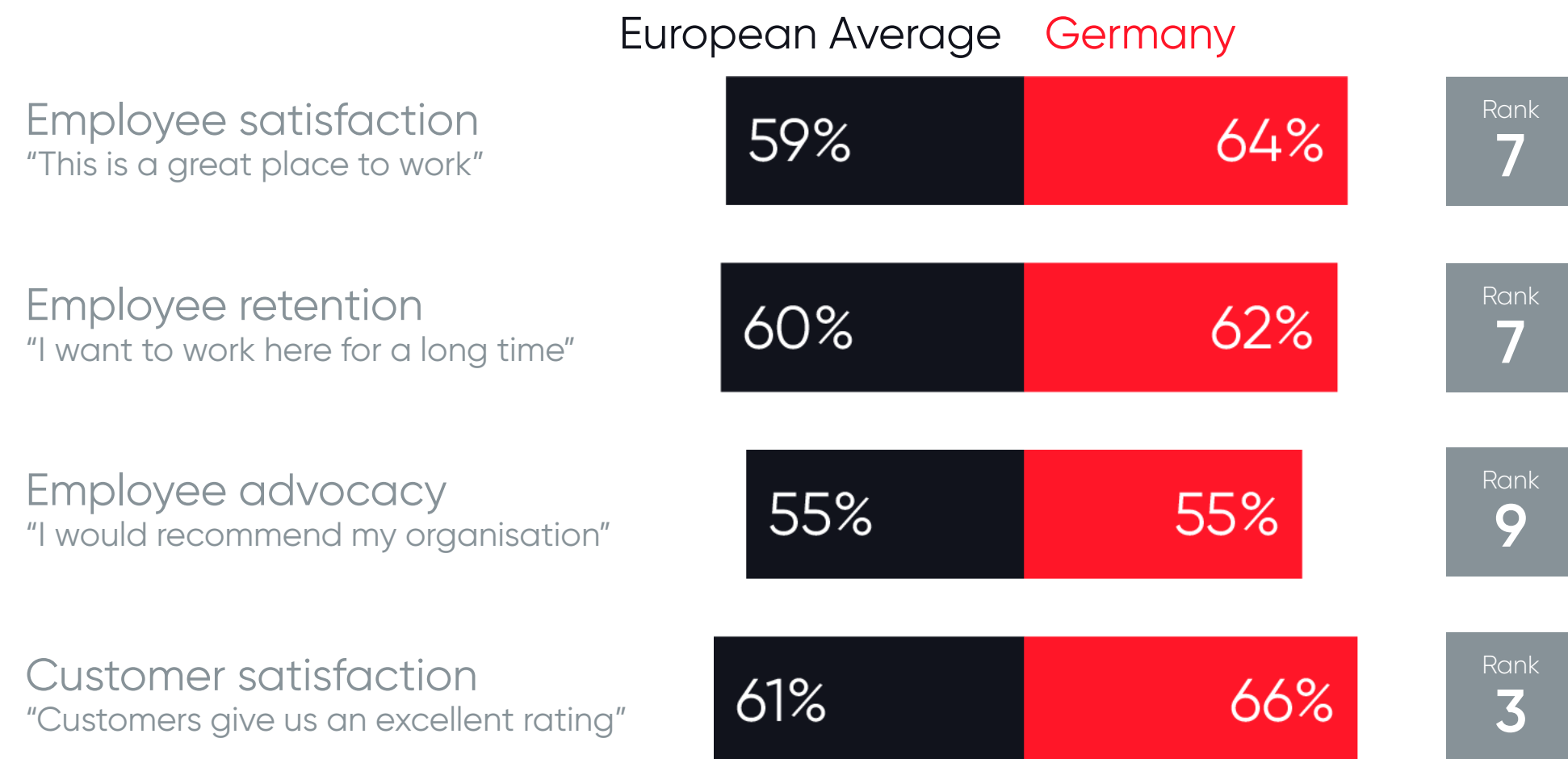
Rank is out of 20 countries

FOCUS ON
Germany



■ Germany
■ European Average

Business outcomes



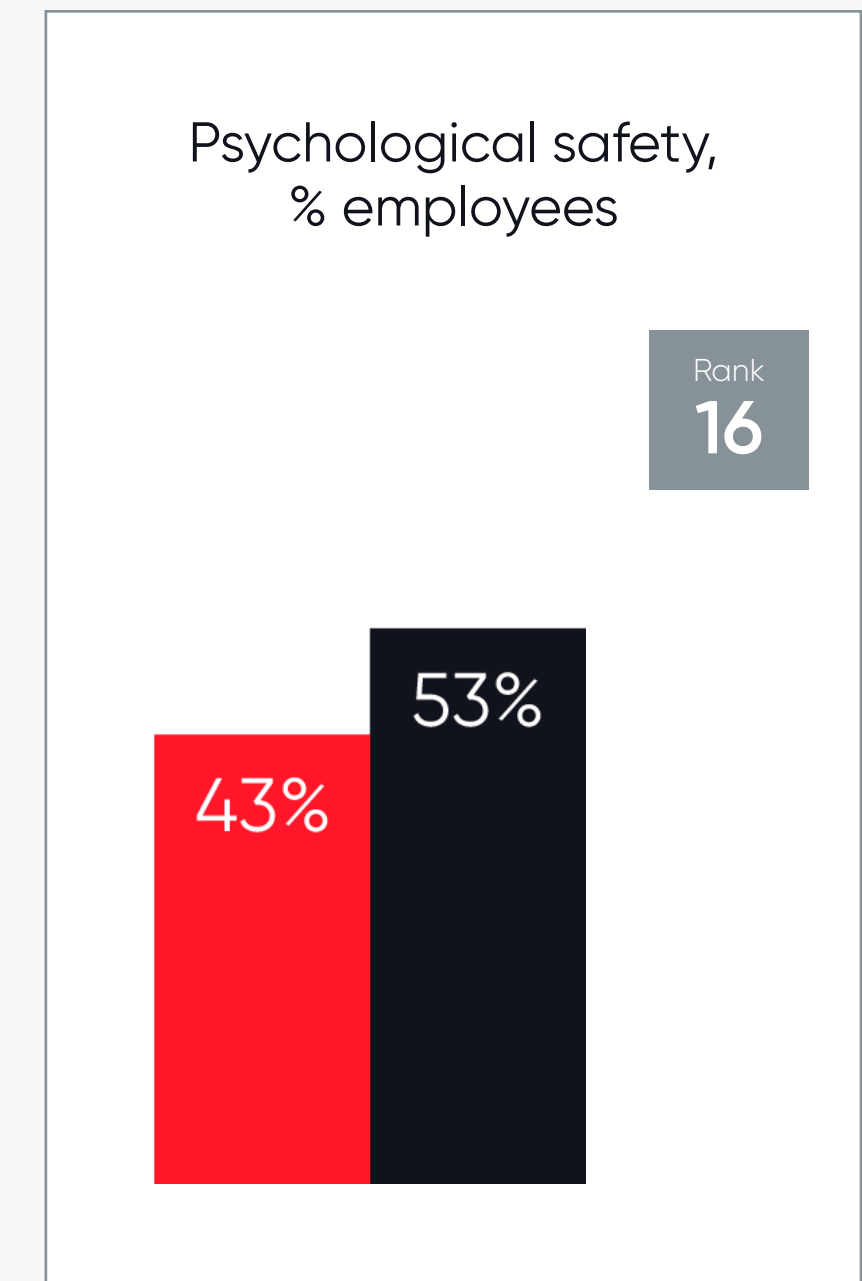
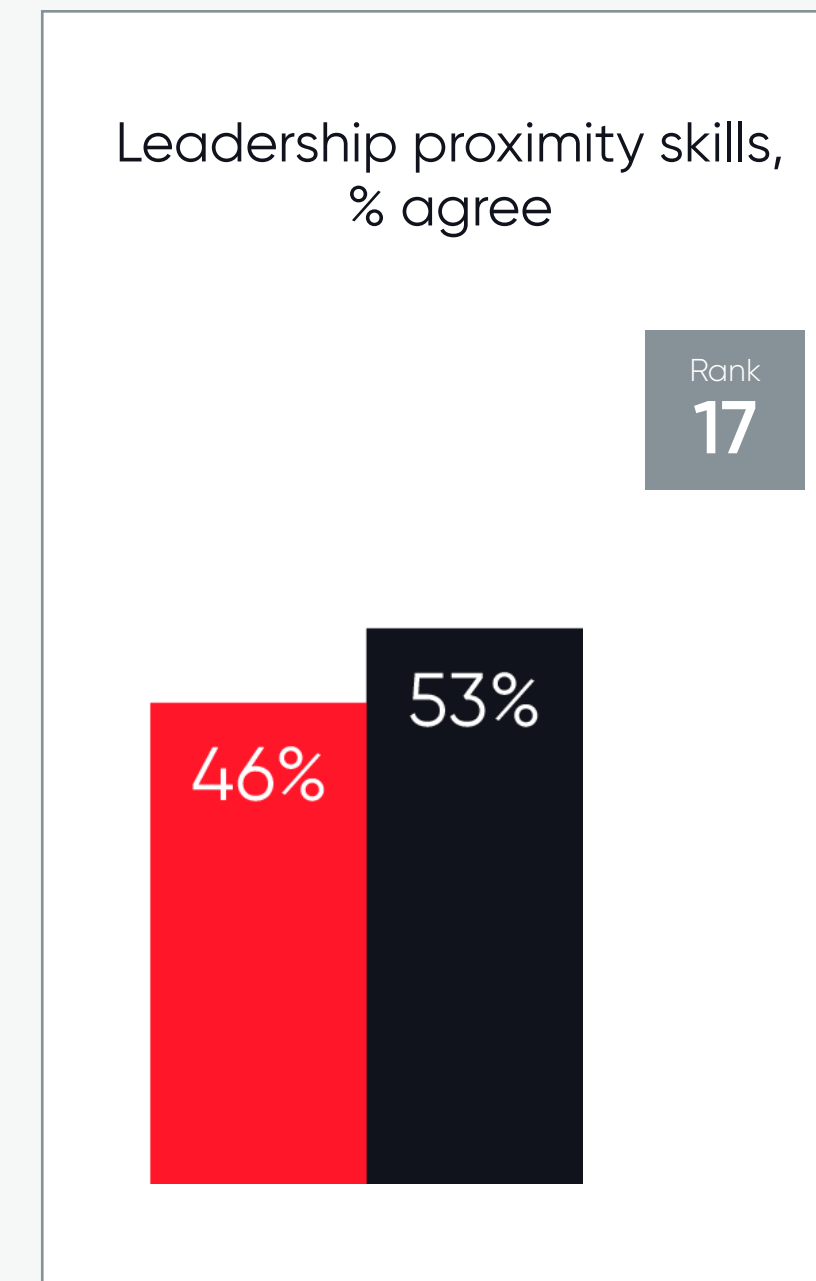
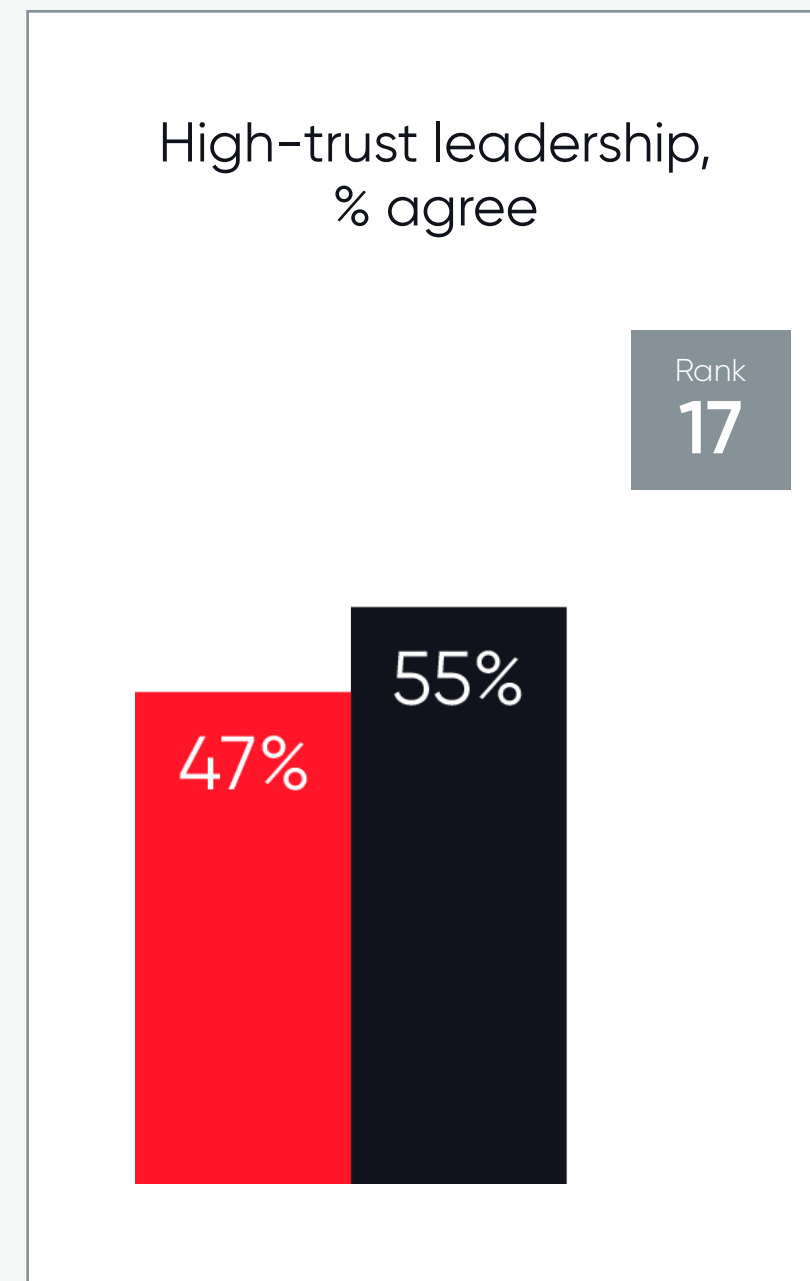
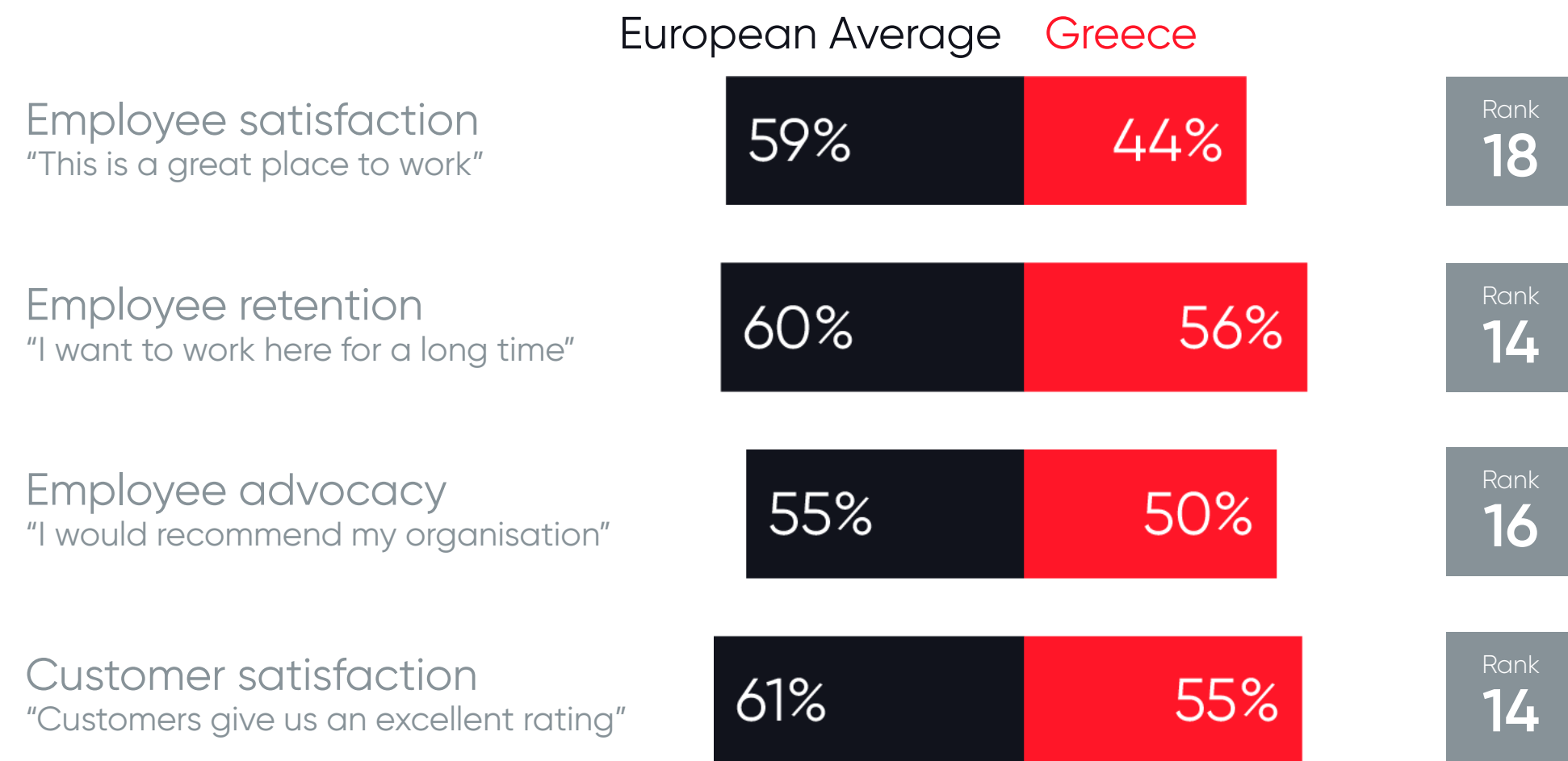
Rank is out of 20 countries

FOCUS ON
Greece



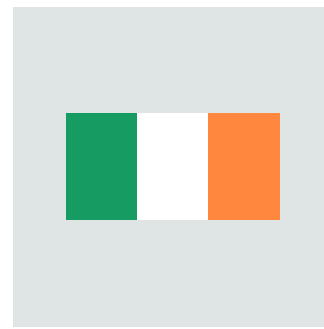
■ Greece
■ European Average

Business outcomes



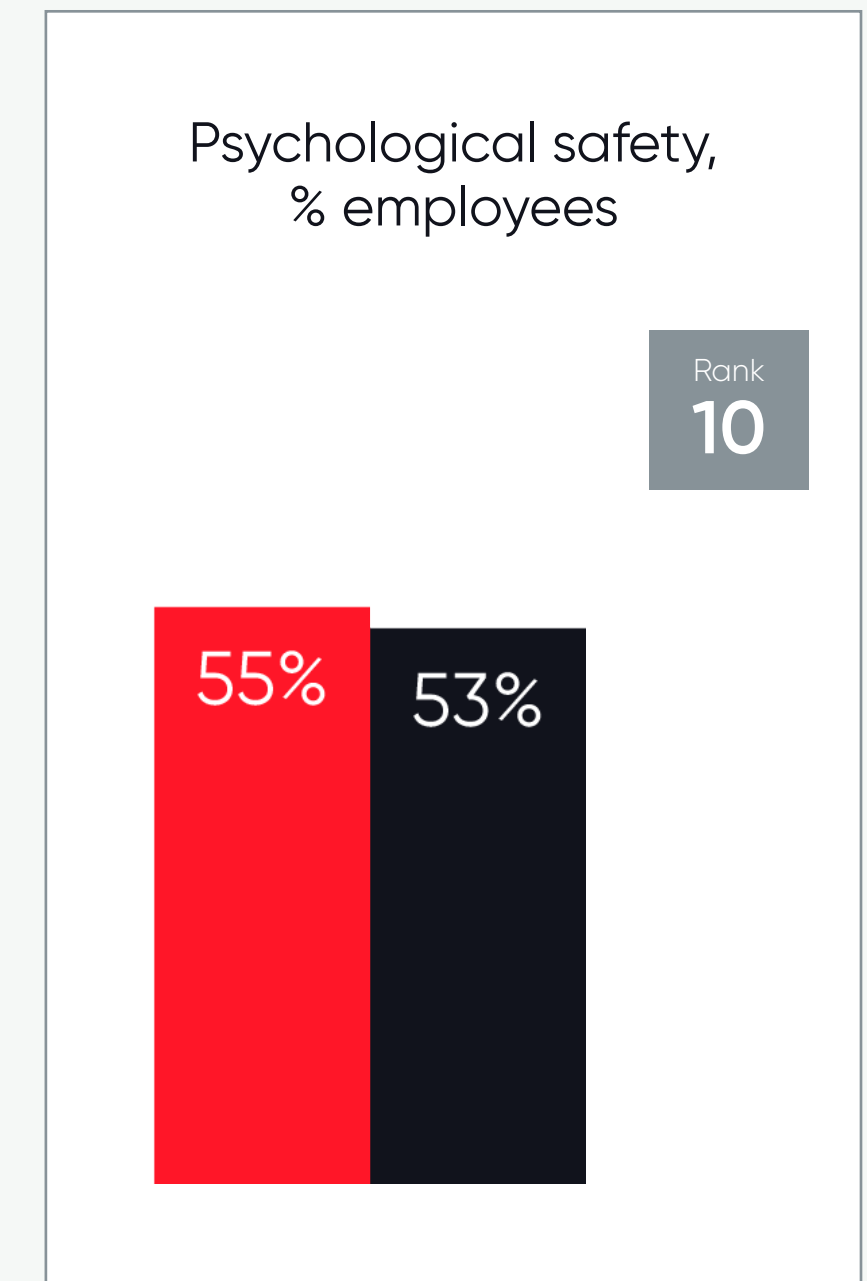
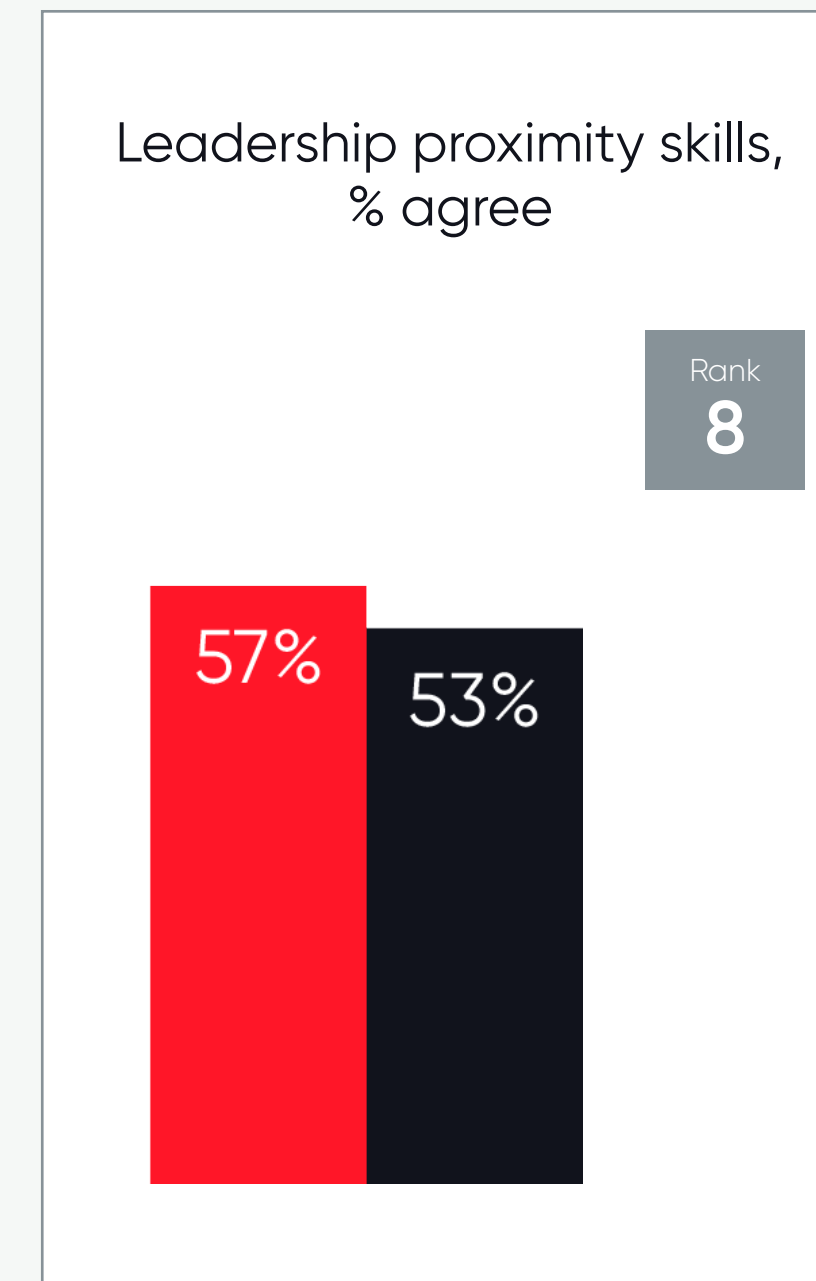
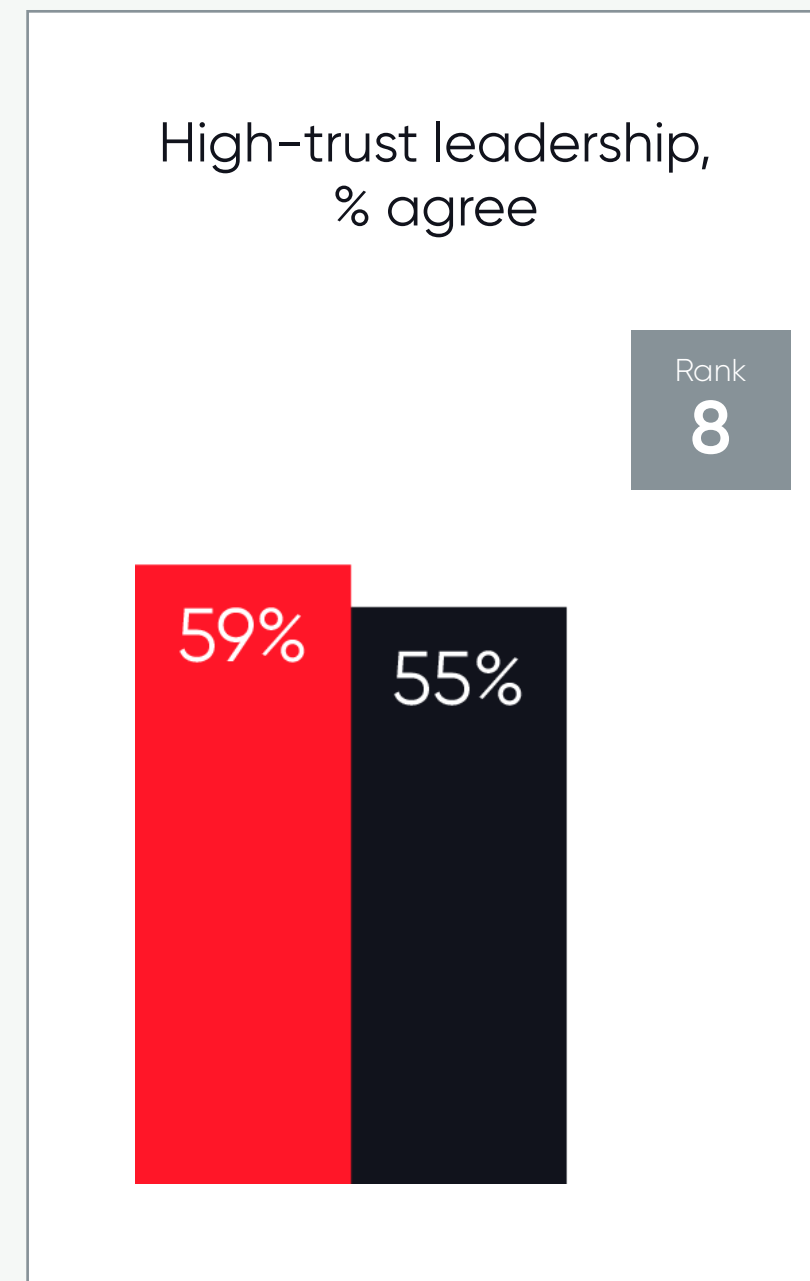
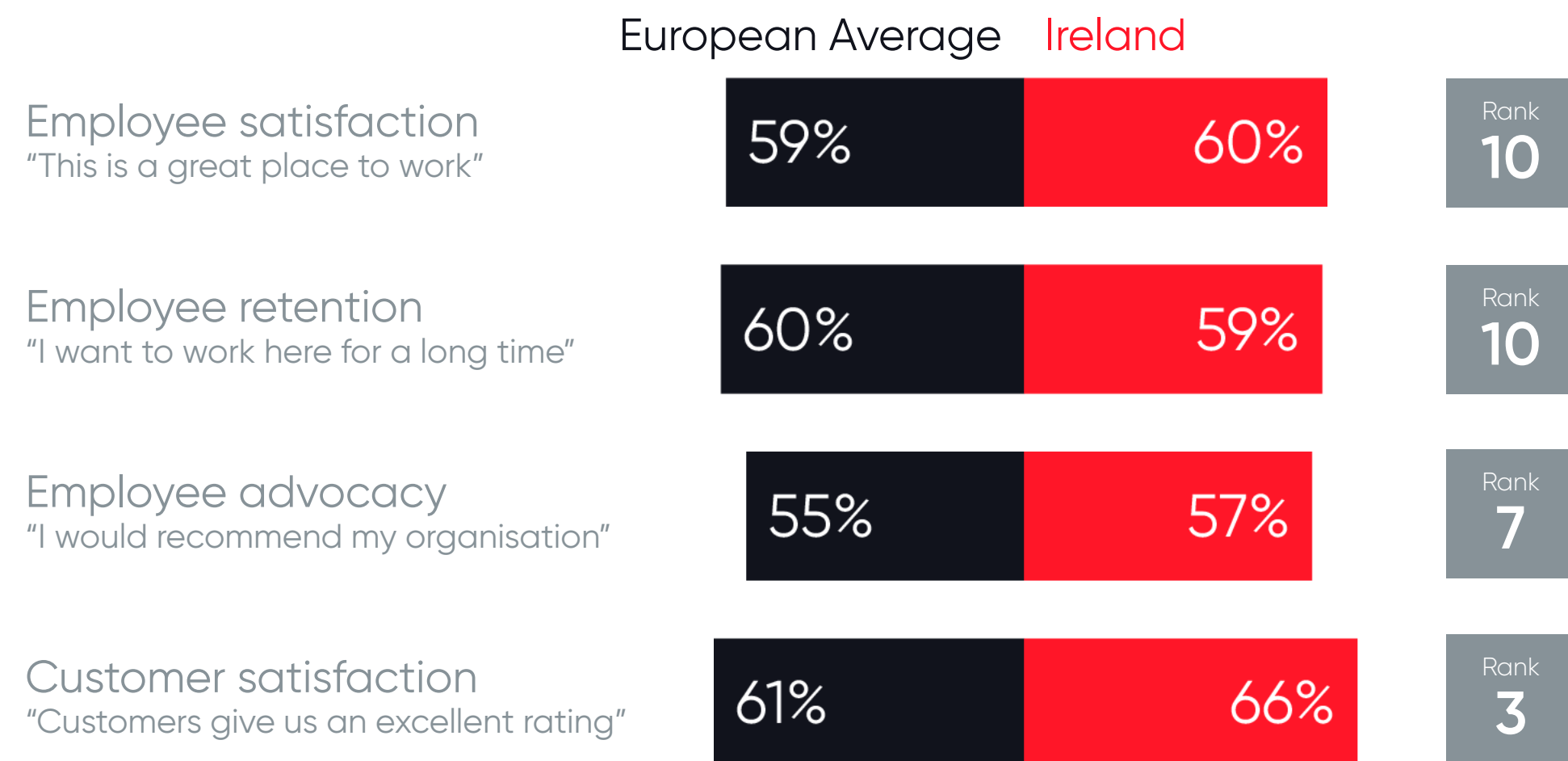
Rank is out of 20 countries

FOCUS ON
Ireland



■ Ireland
■ European Average

Business outcomes



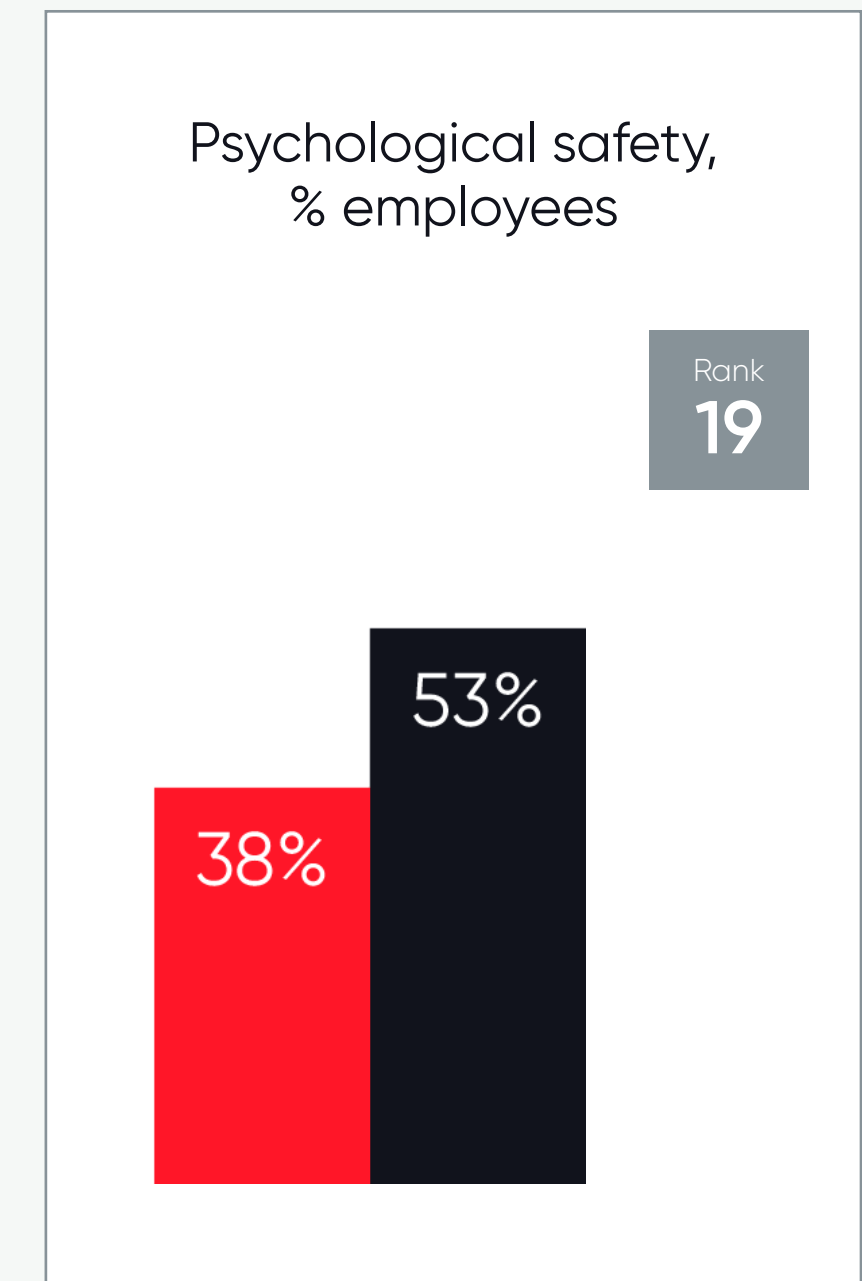
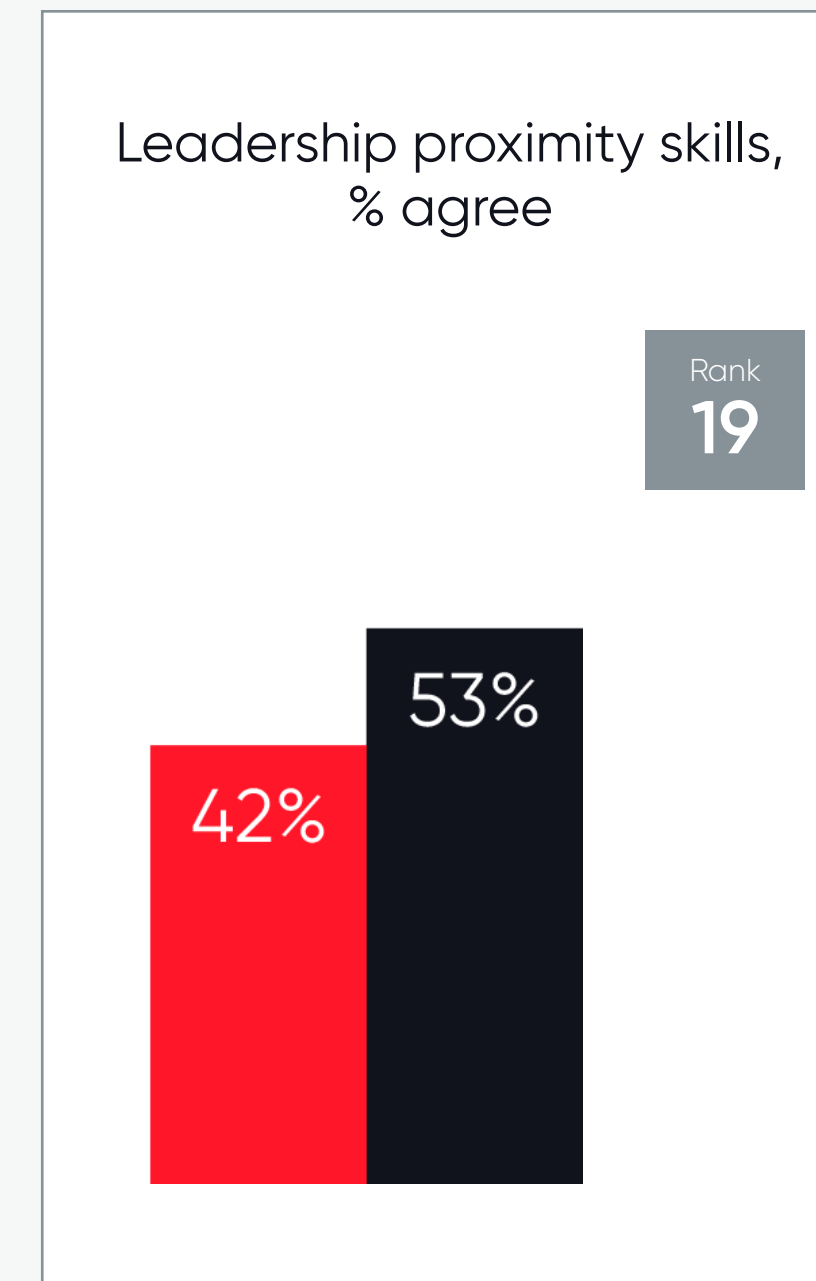
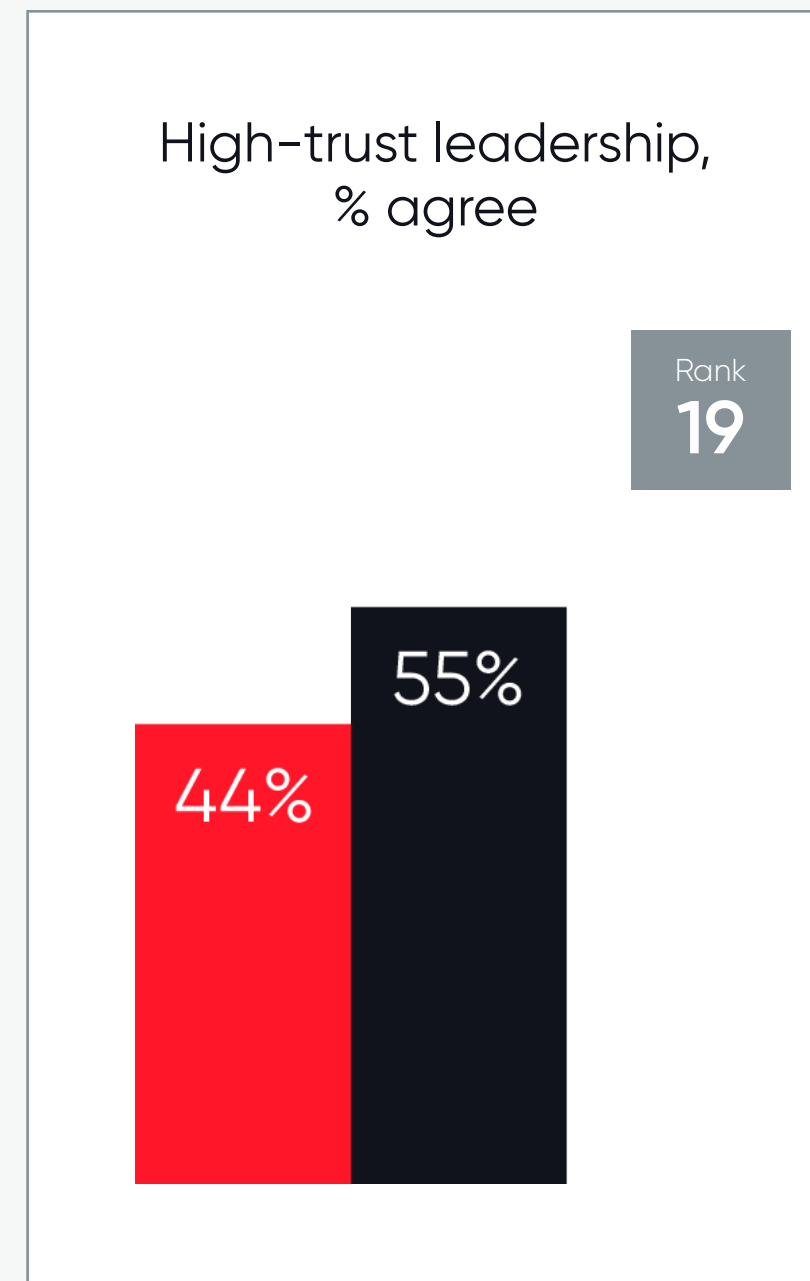
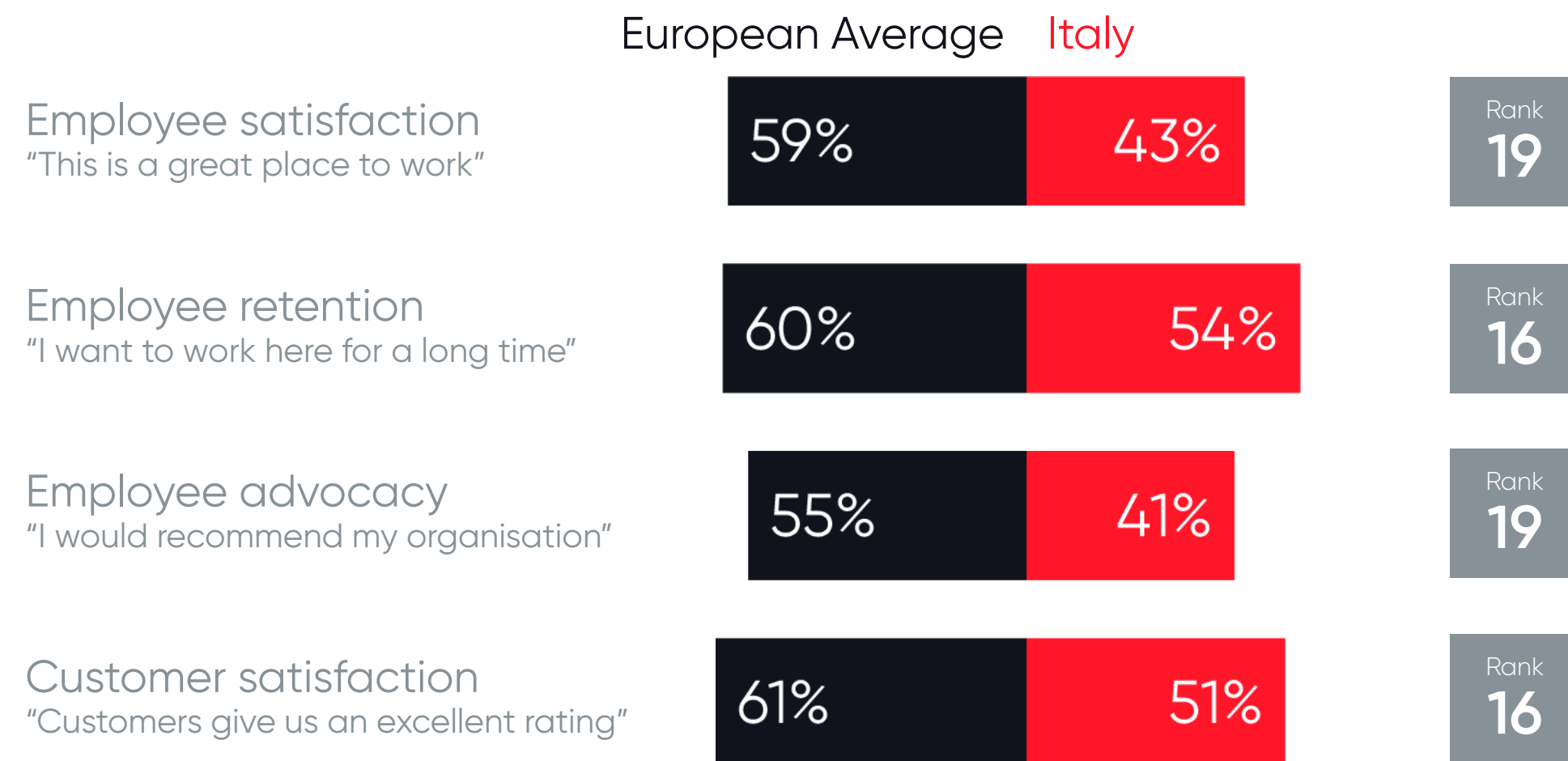
Rank is out of 20 countries

FOCUS ON
Italy



■ Italy
■ European Average

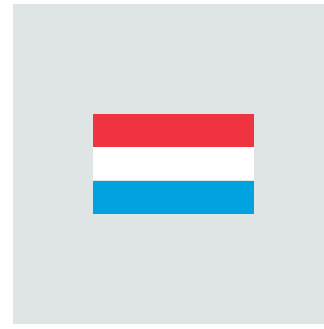
Business outcomes



Rank is out of 20 countries

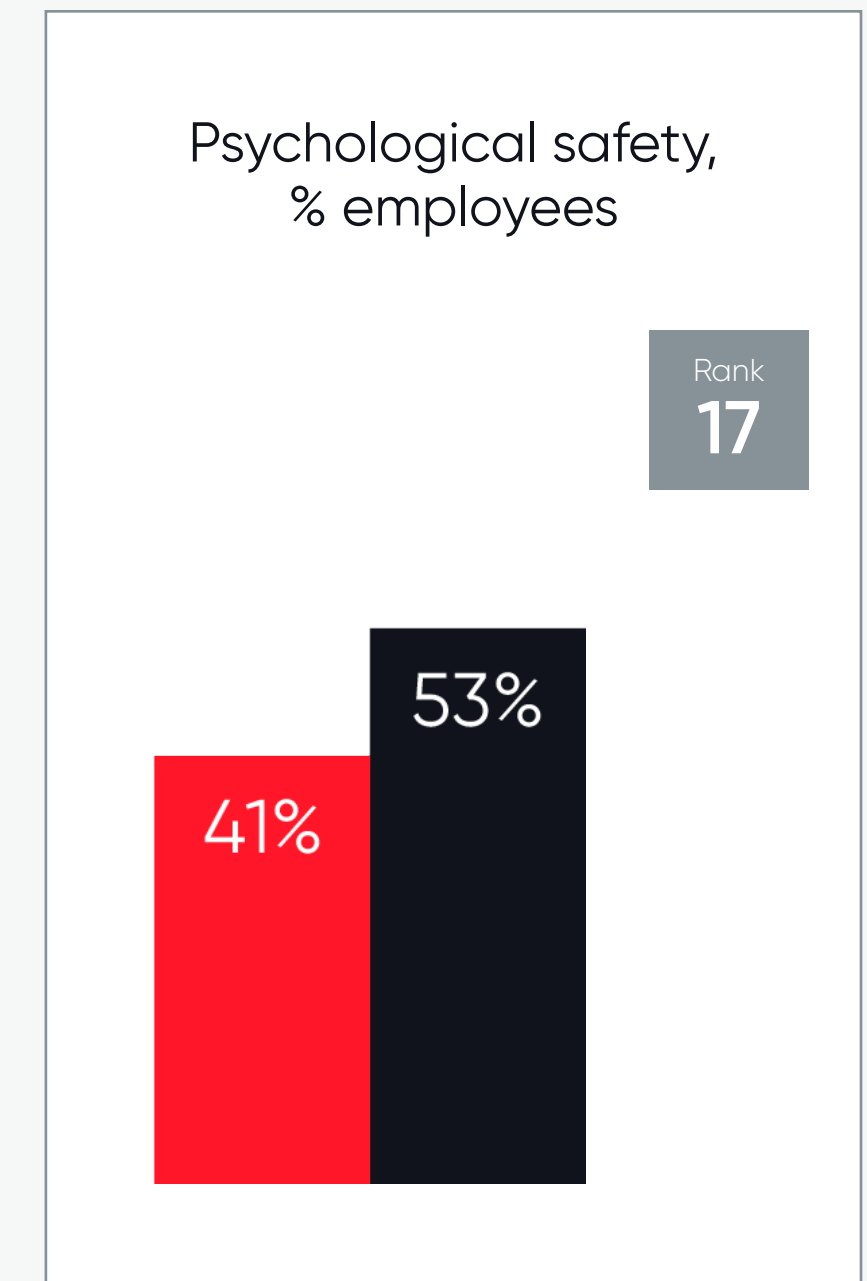
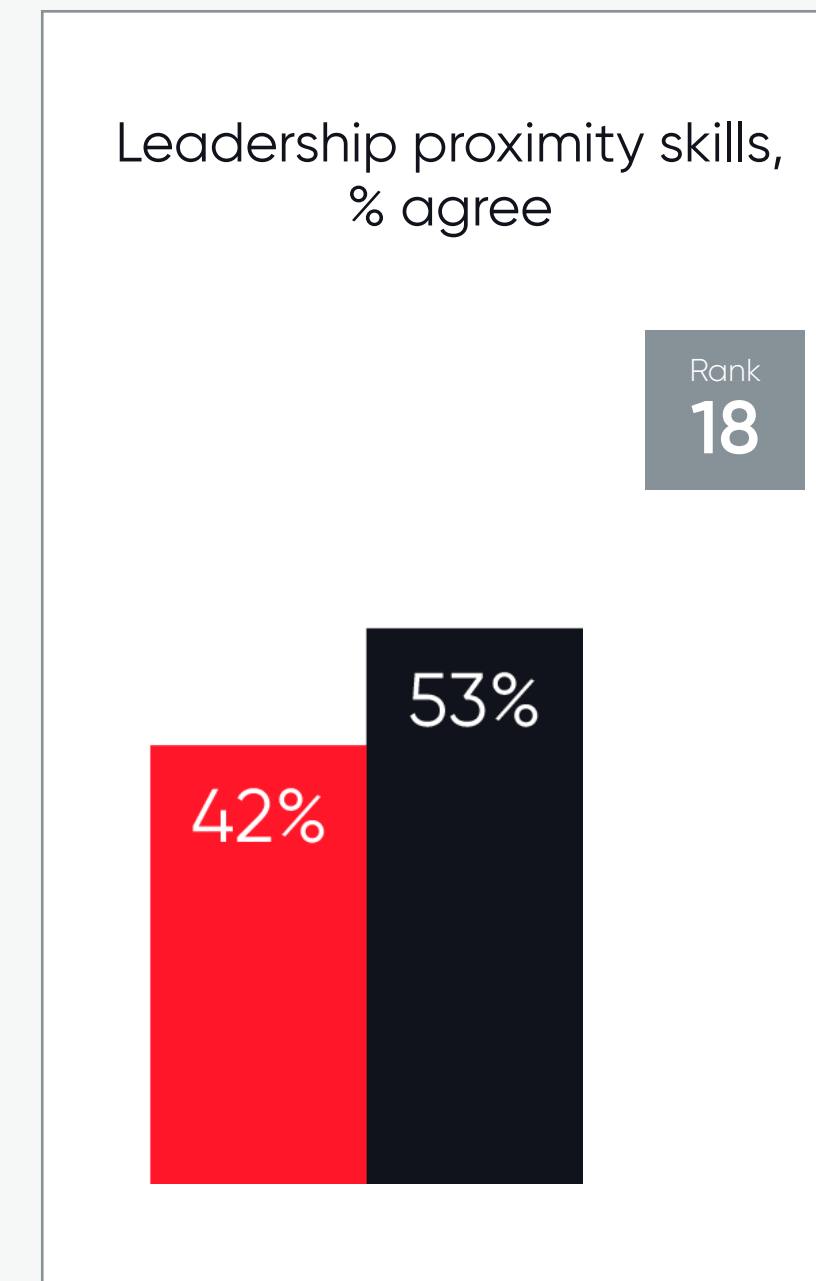
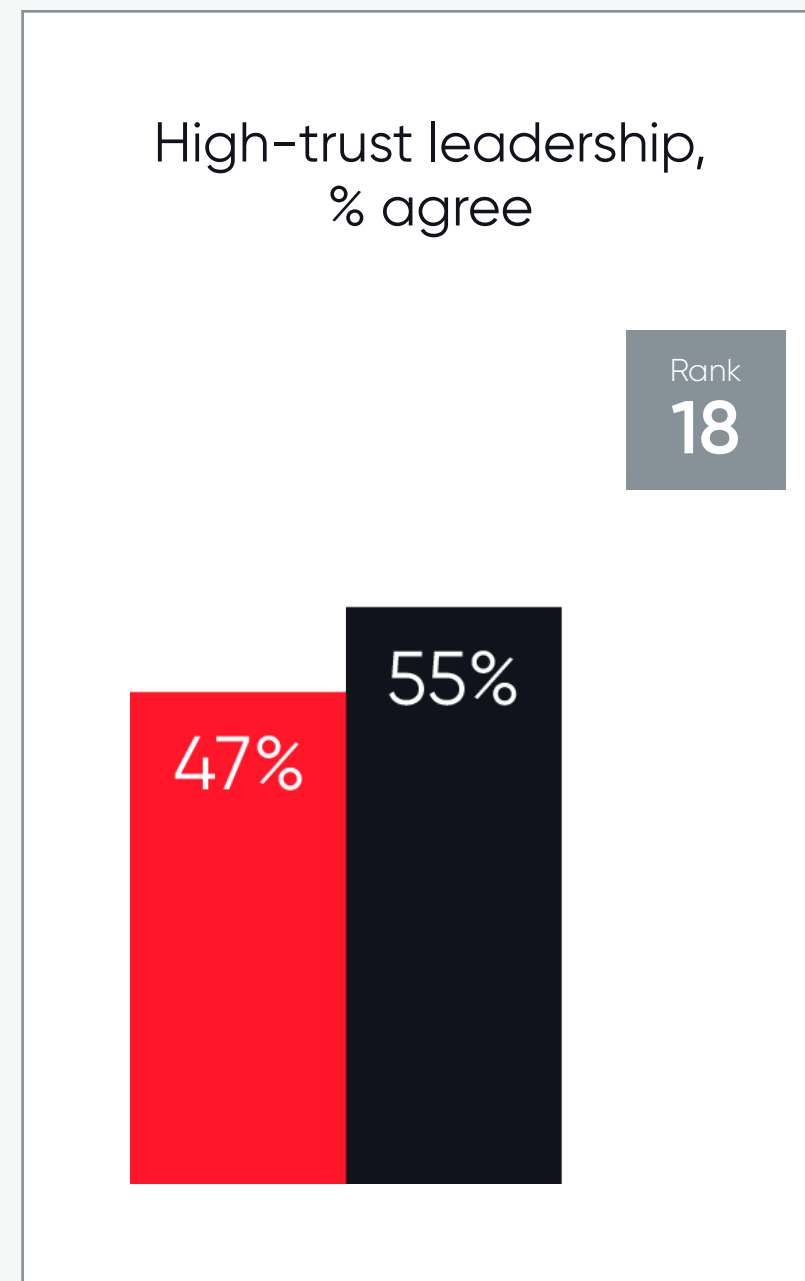
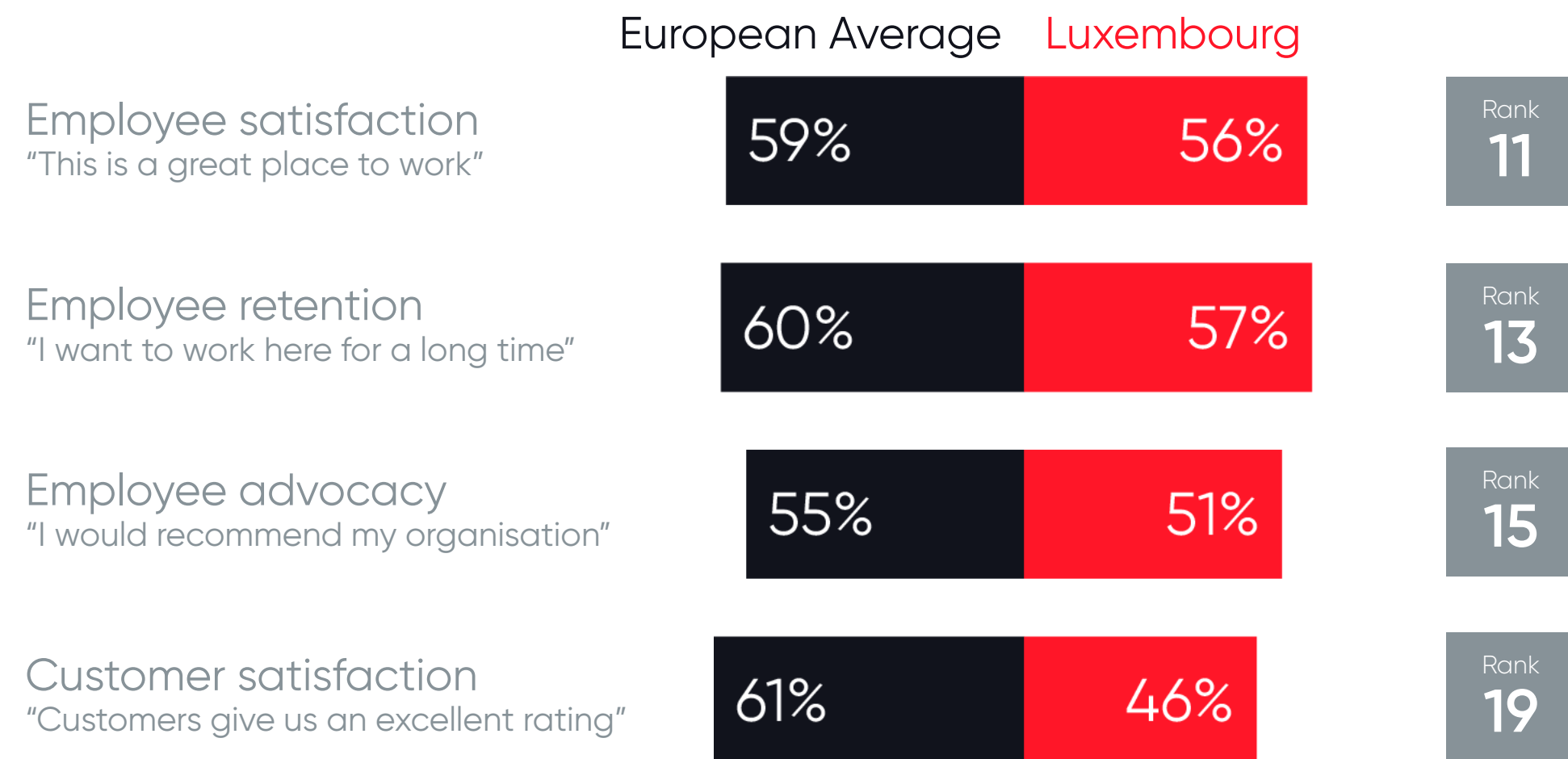
FOCUS ON

Luxembourg



■ Luxembourg
■ European Average

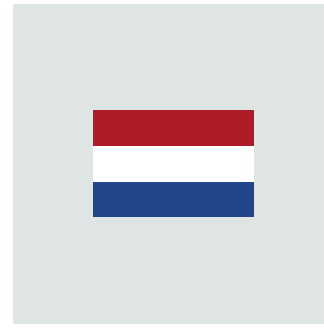
Business outcomes



Rank is out of 20 countries

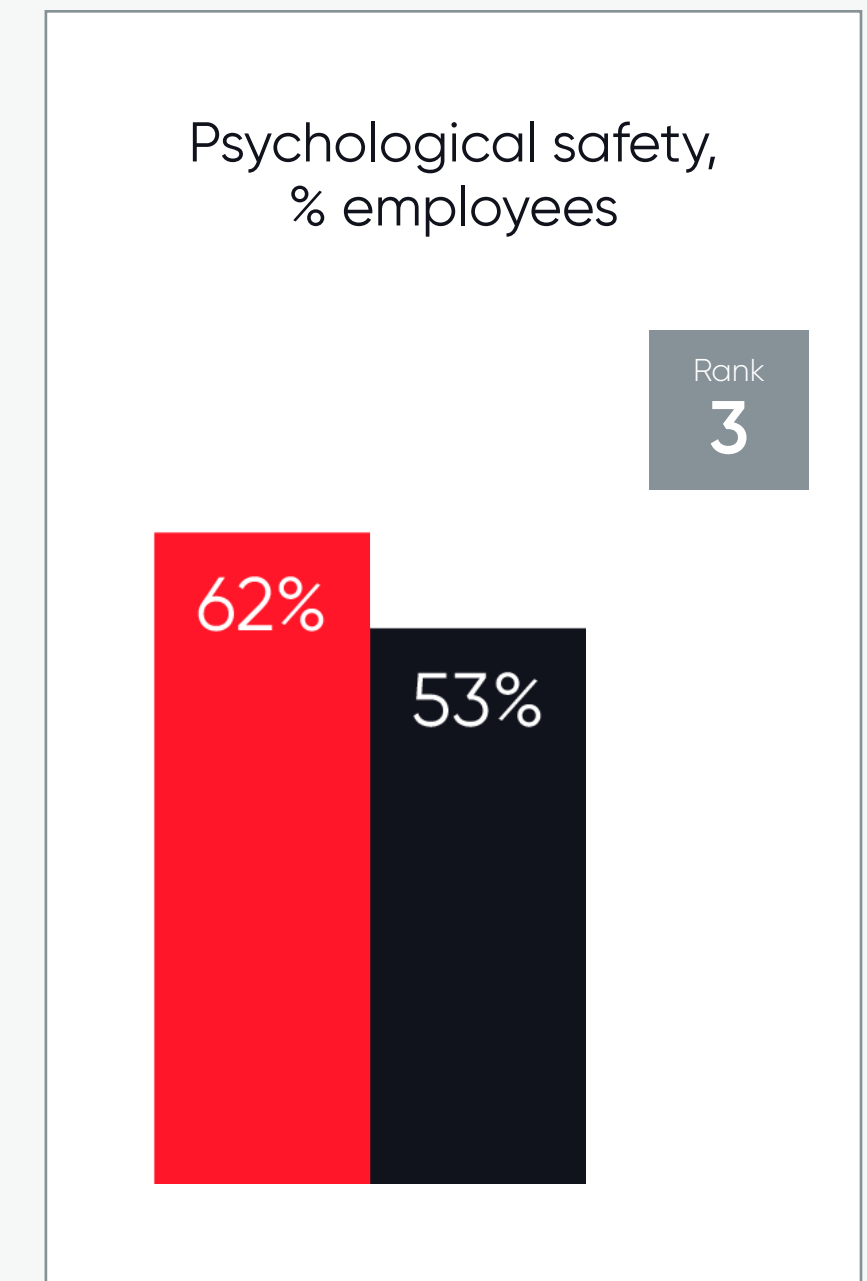
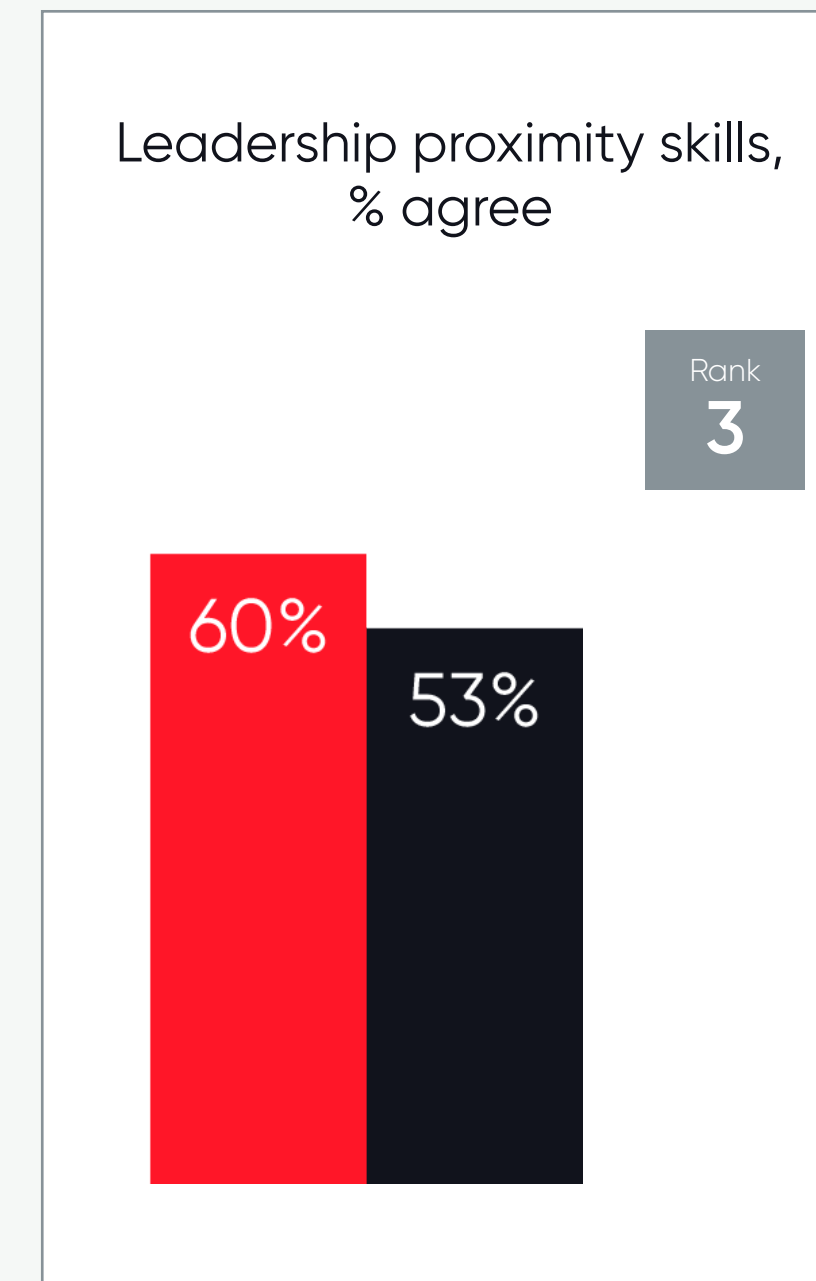
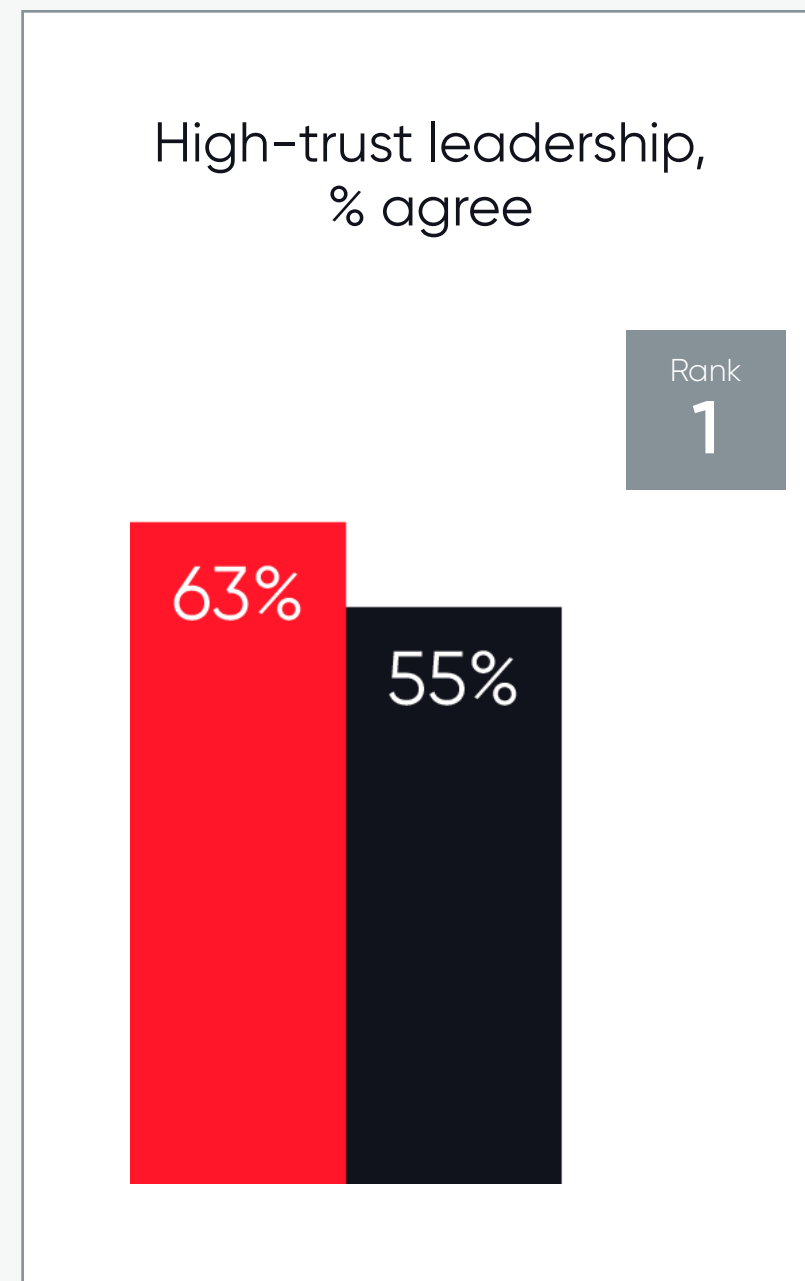
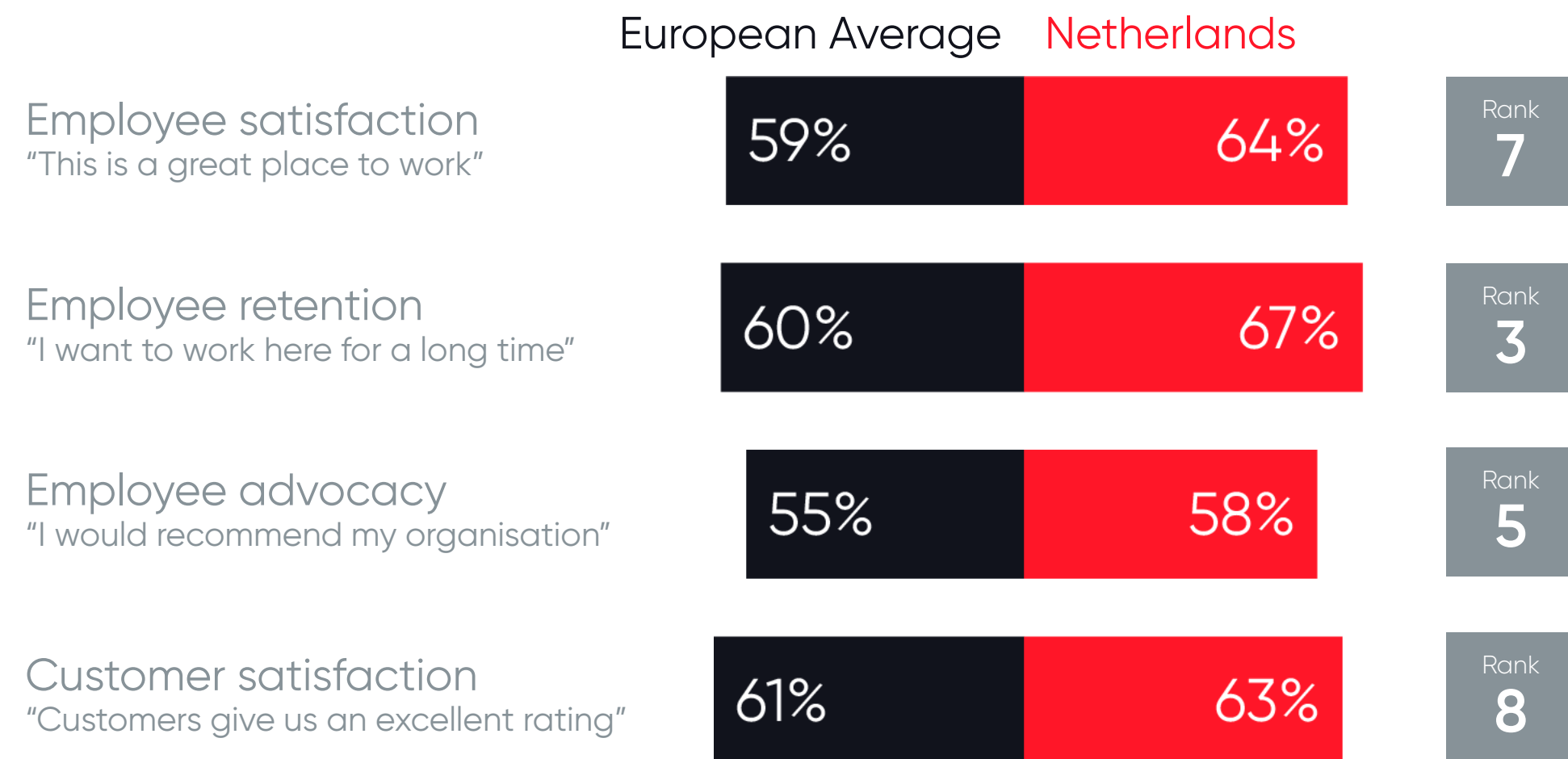
FOCUS ON

Netherlands



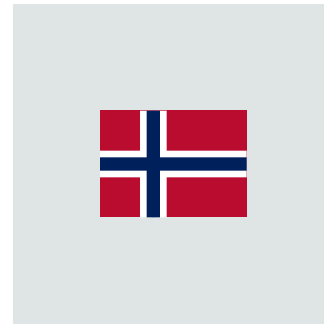
■ Netherlands
■ European Average

Business outcomes



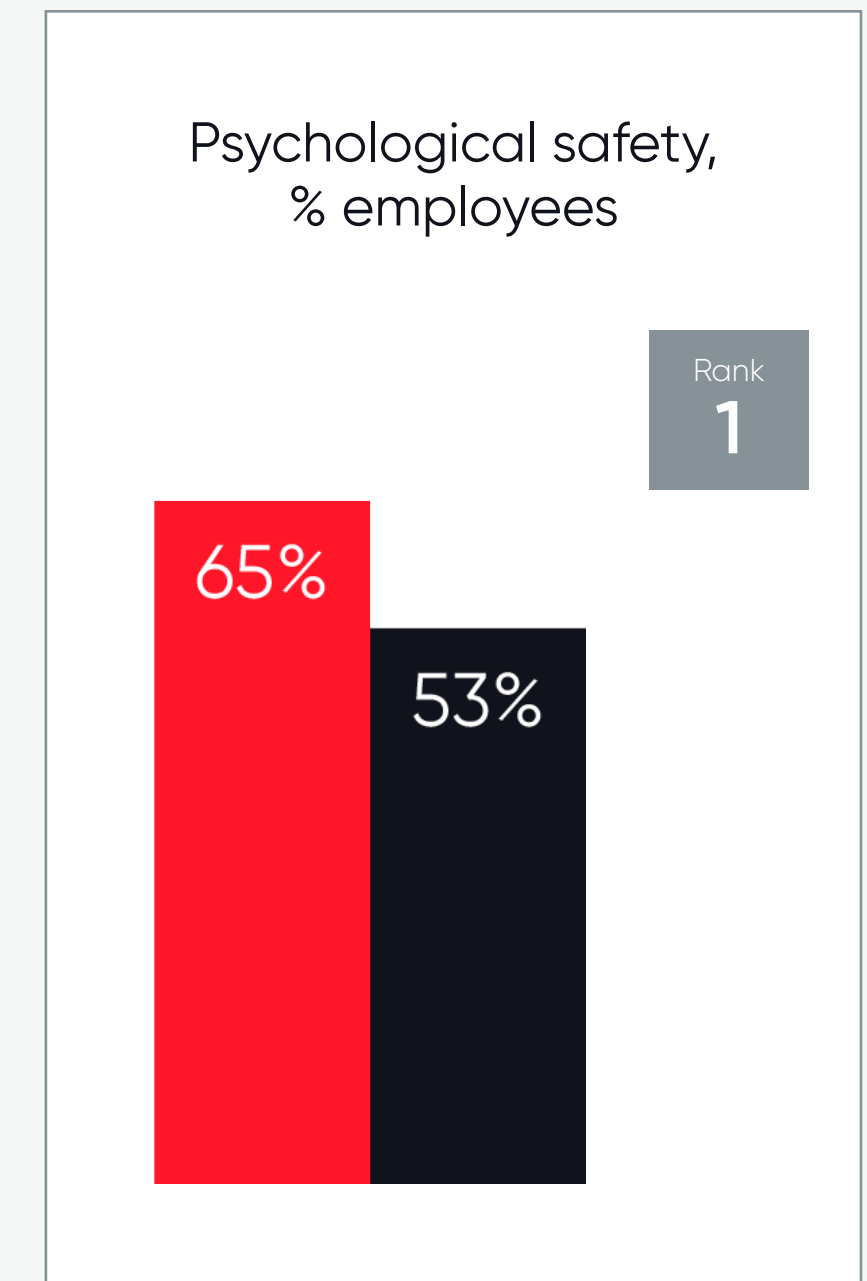
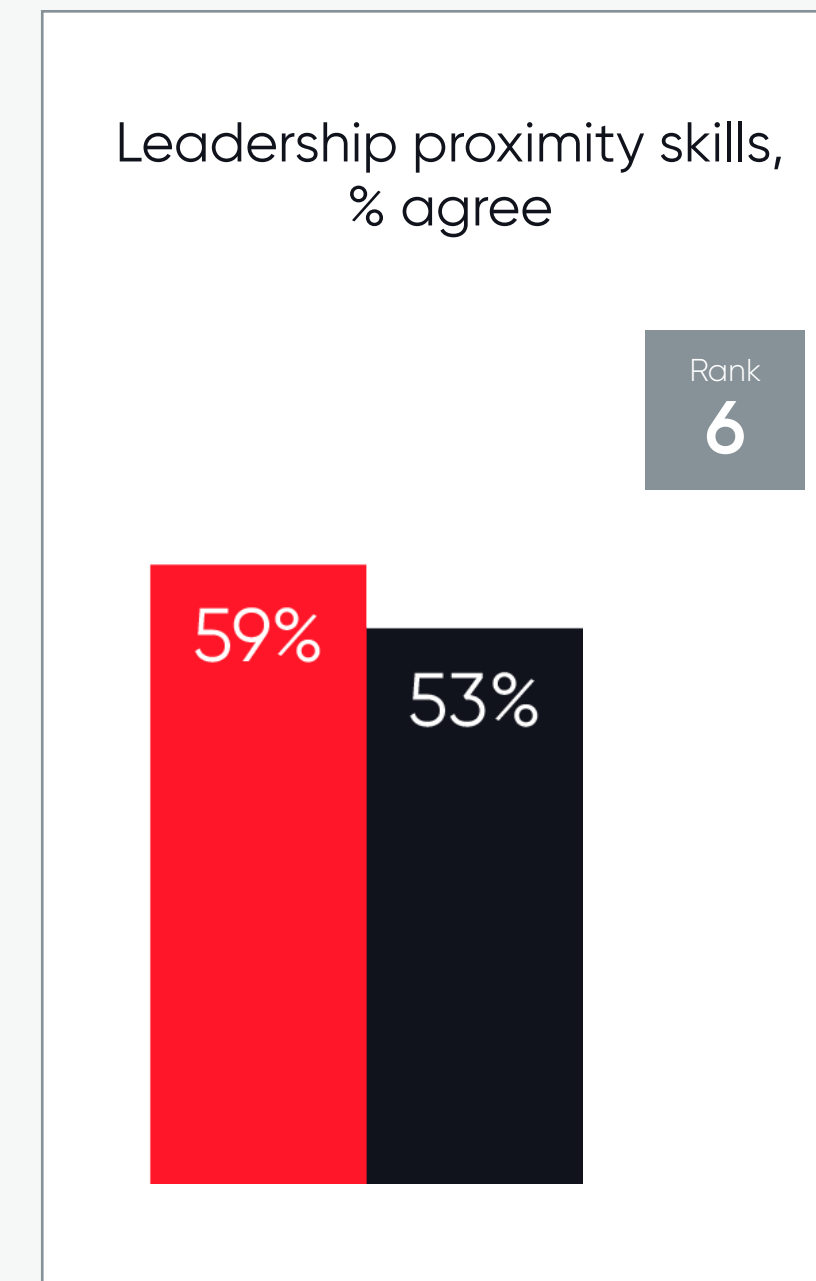
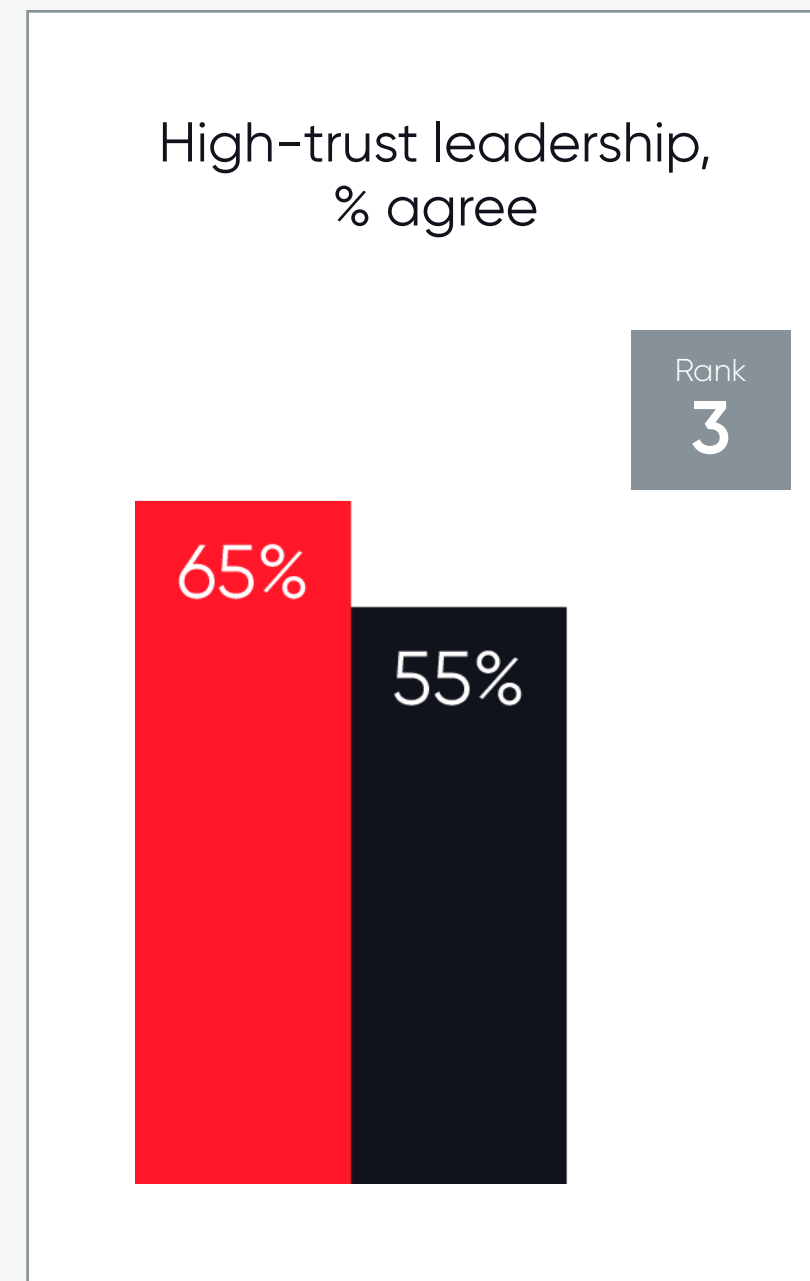
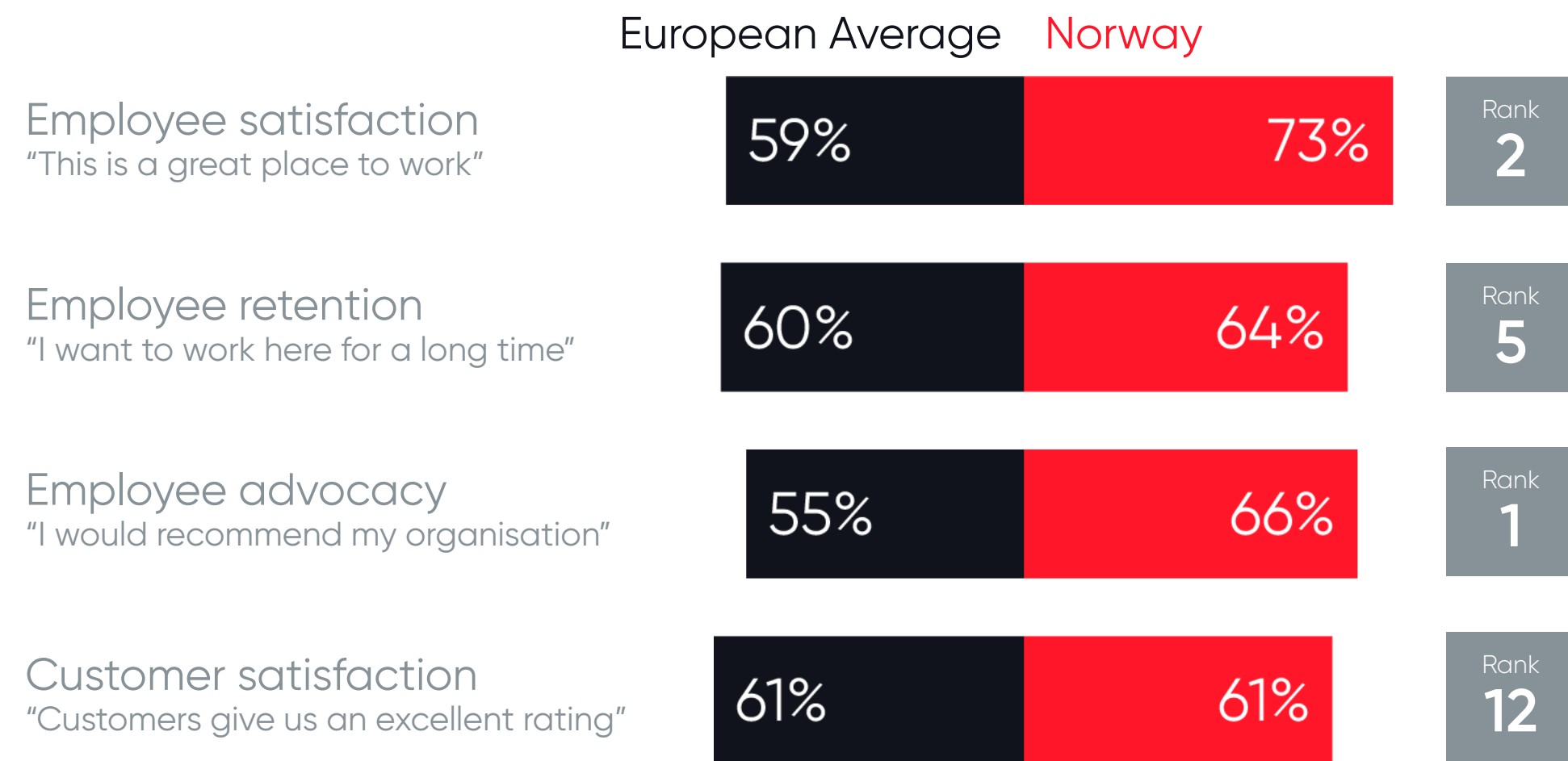
Rank is out of 20 countries

FOCUS ON
Norway



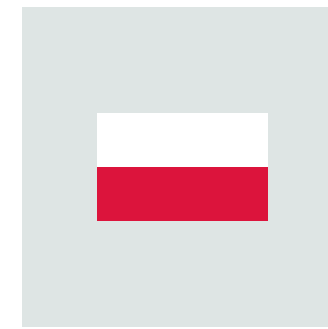
■ Norway
■ European Average

Business outcomes



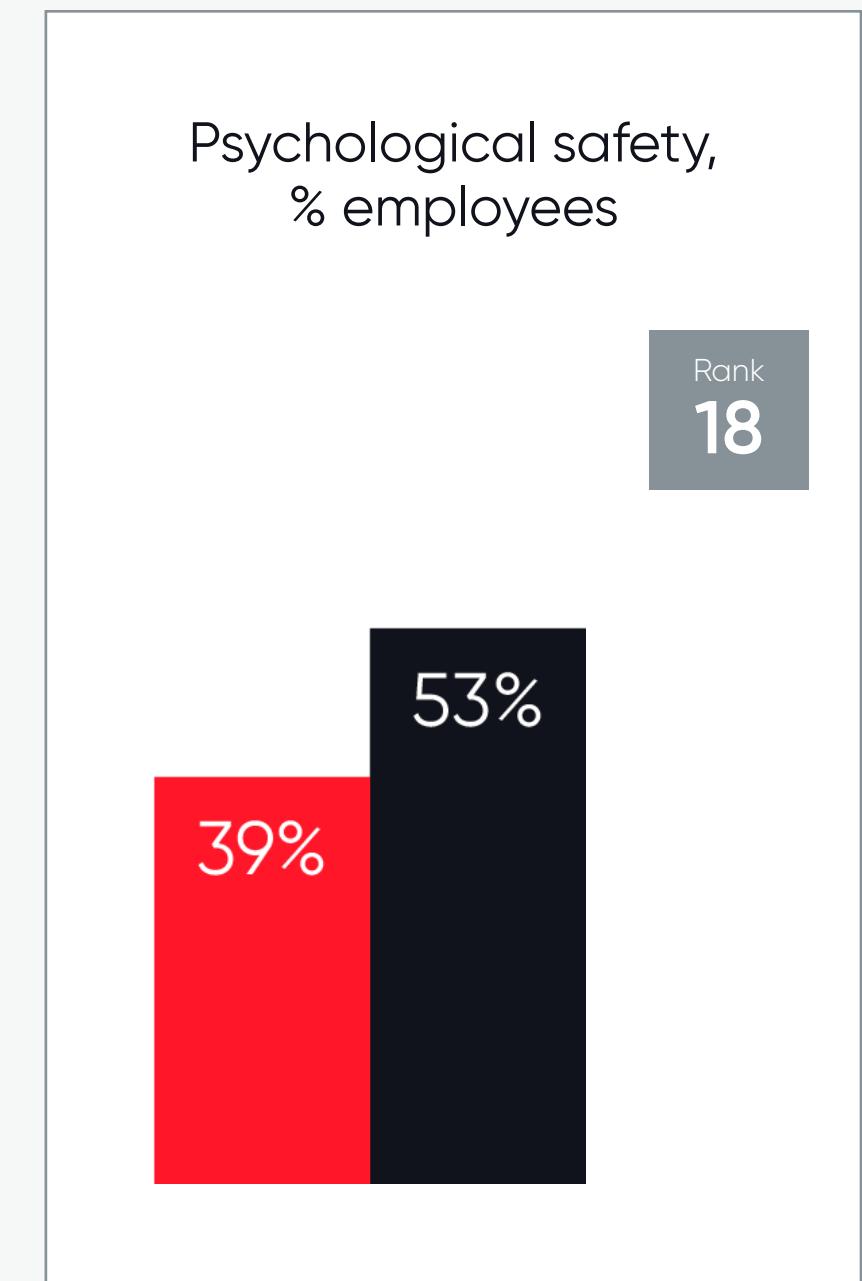
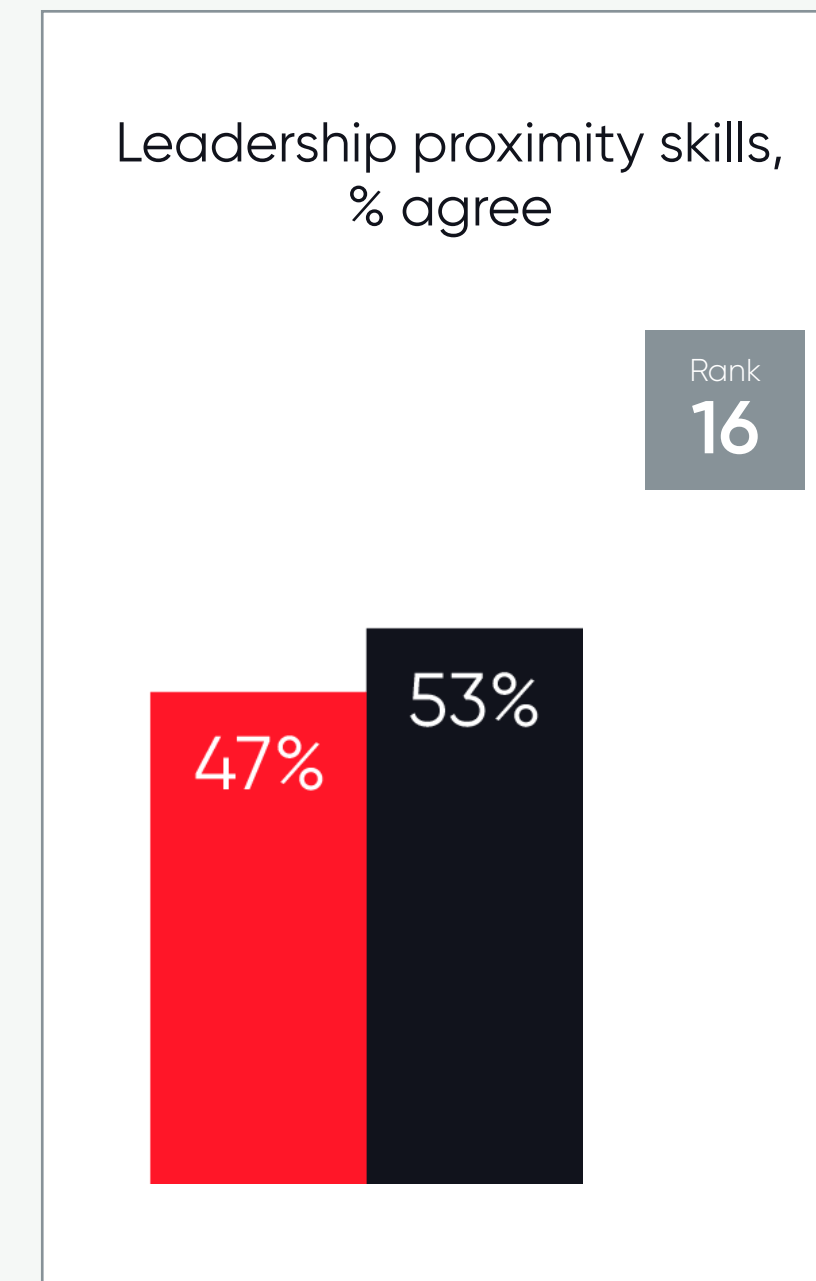
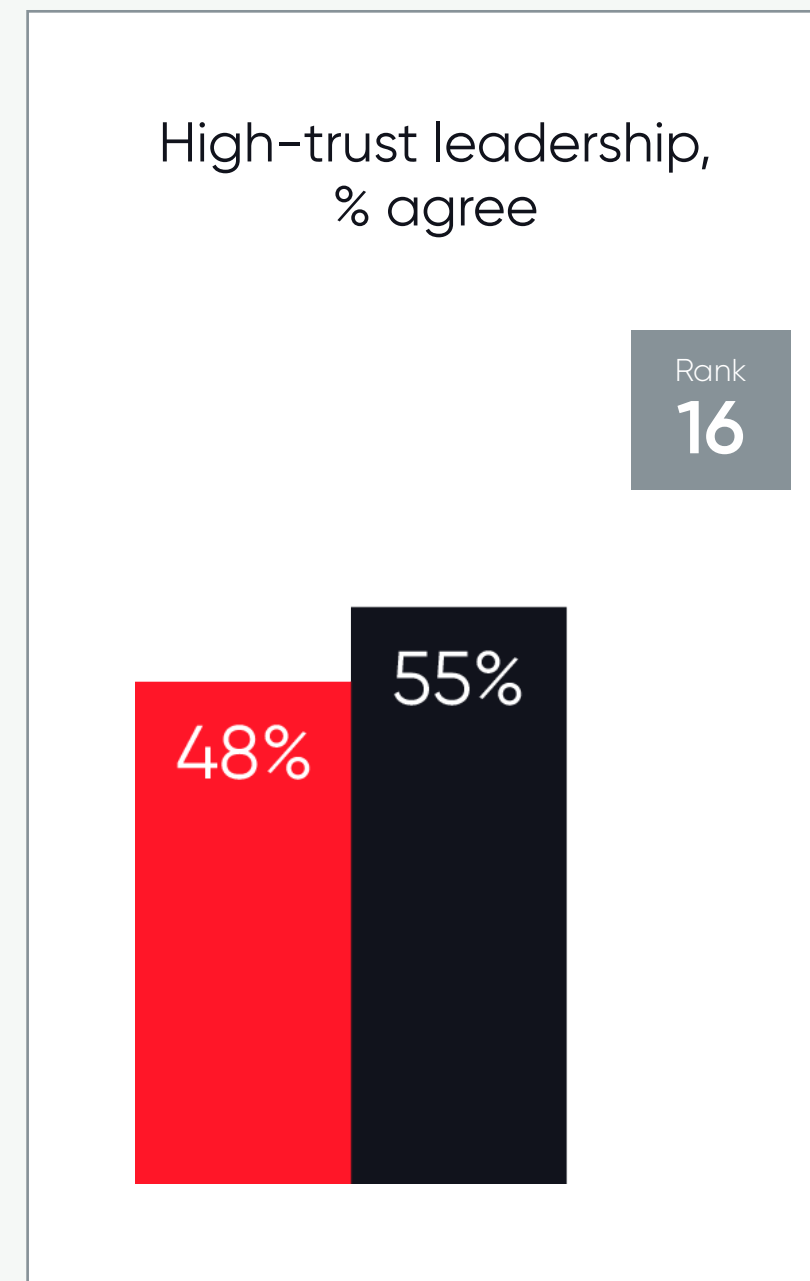
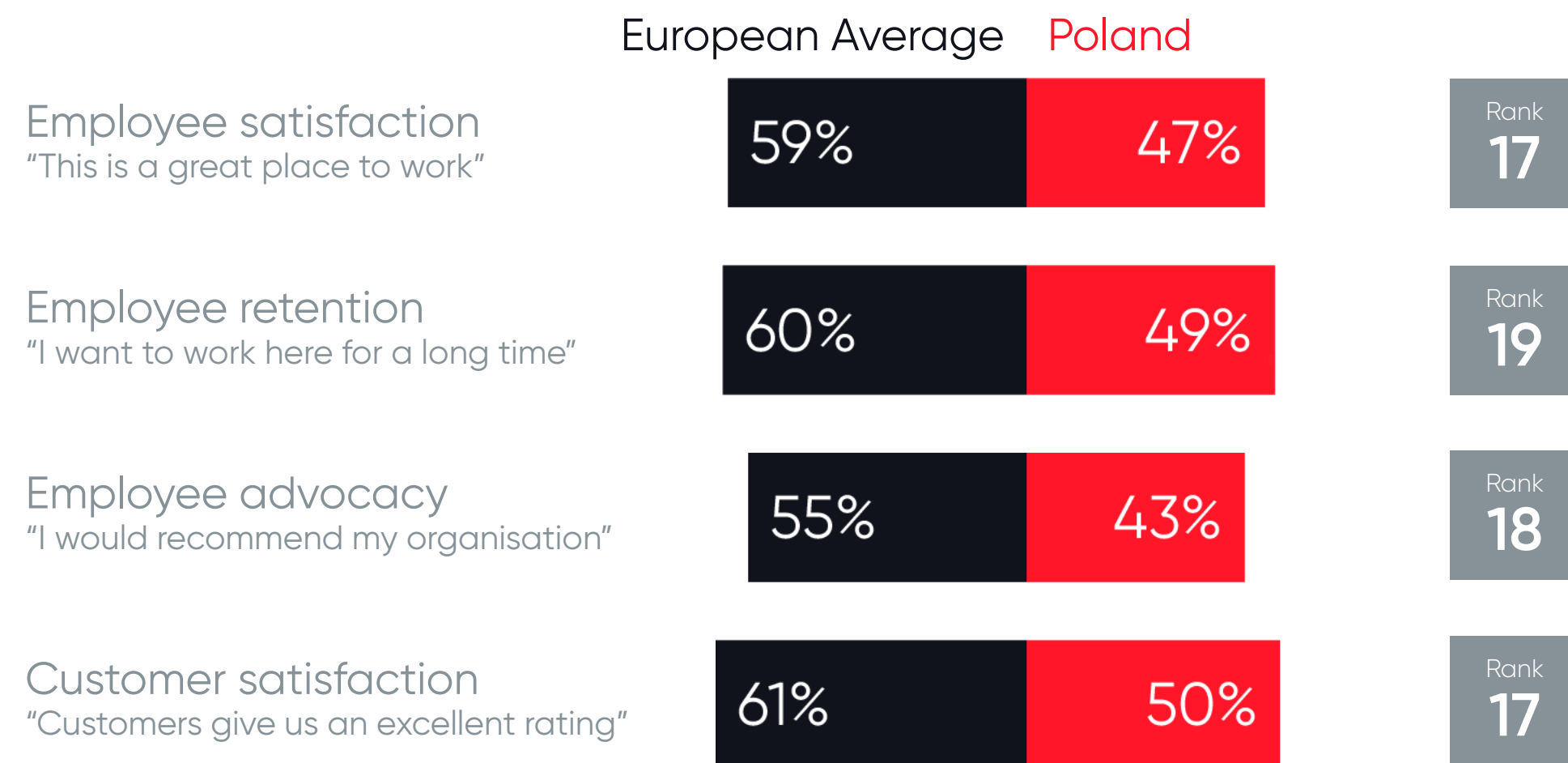
Rank is out of 20 countries

FOCUS ON
Poland



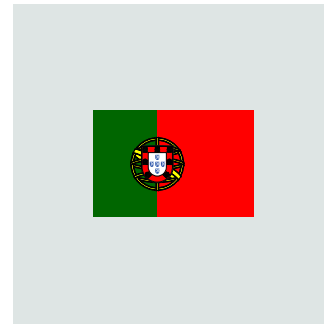
■ Poland
■ European Average

Business outcomes



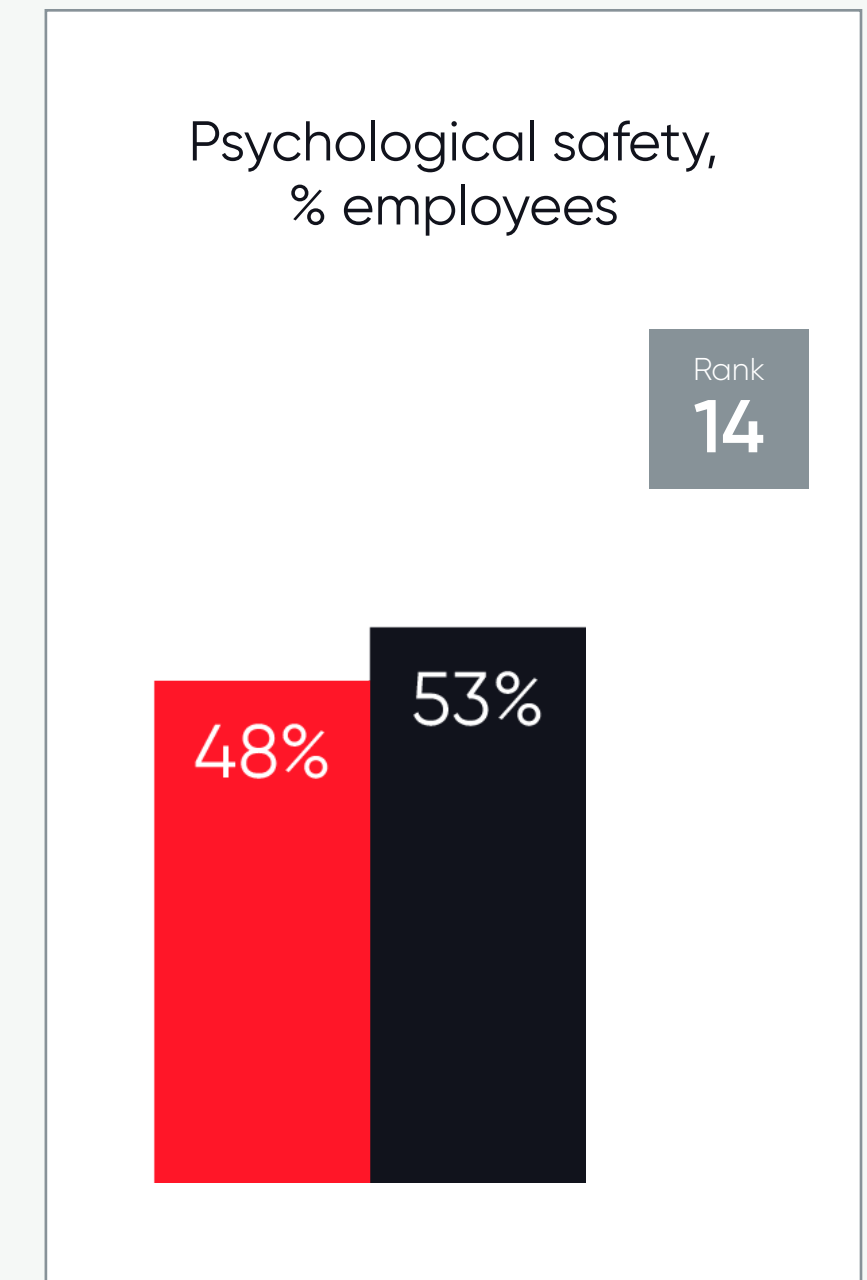
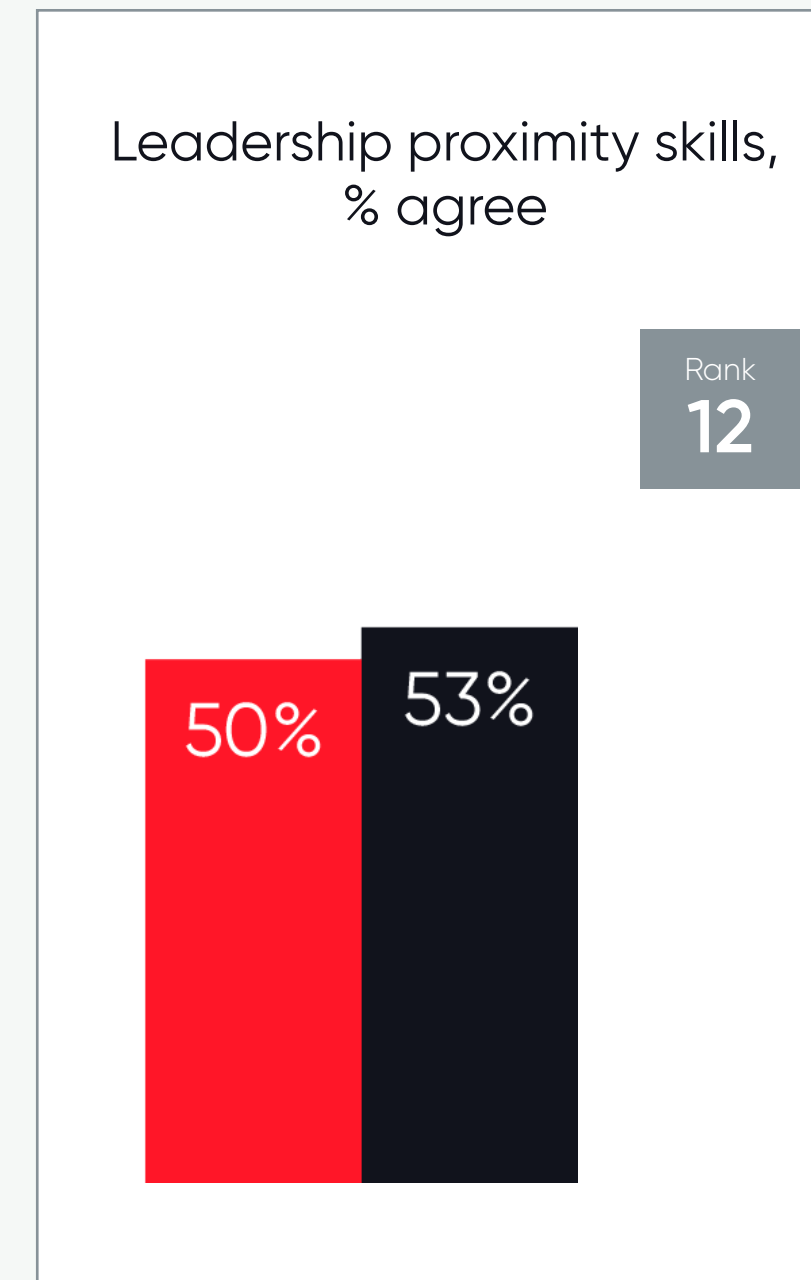
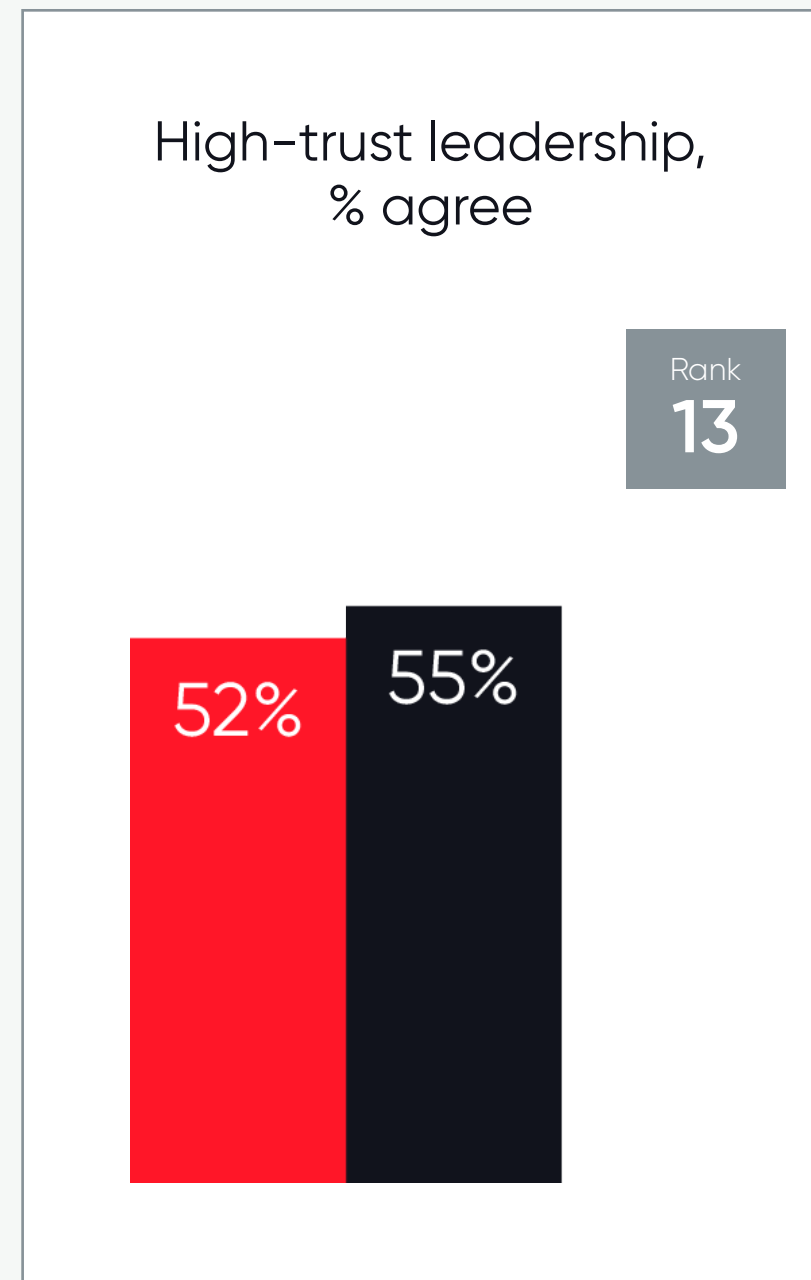
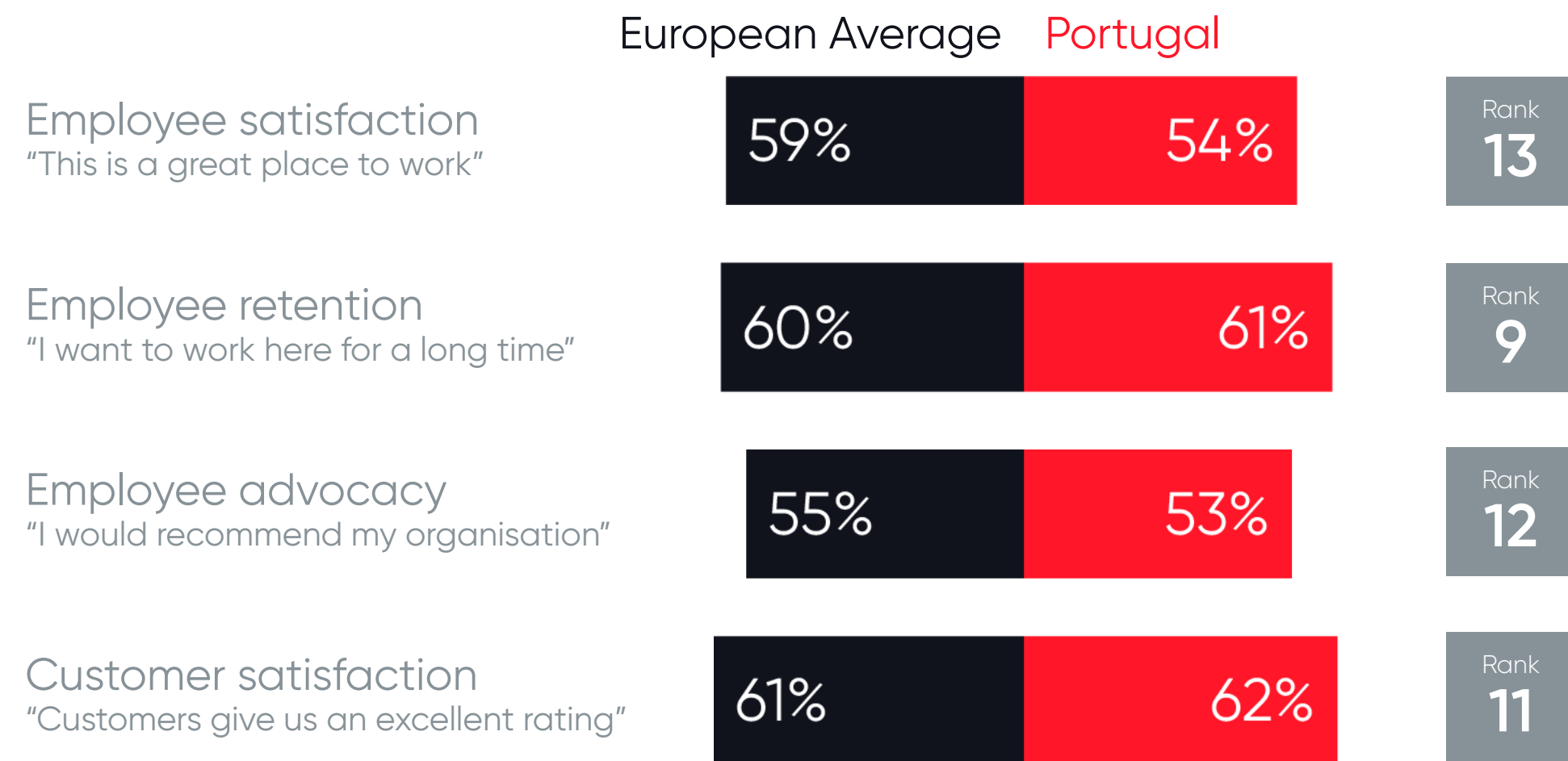
Rank is out of 20 countries

FOCUS ON
Portugal



■ Portugal
■ European Average

Business outcomes



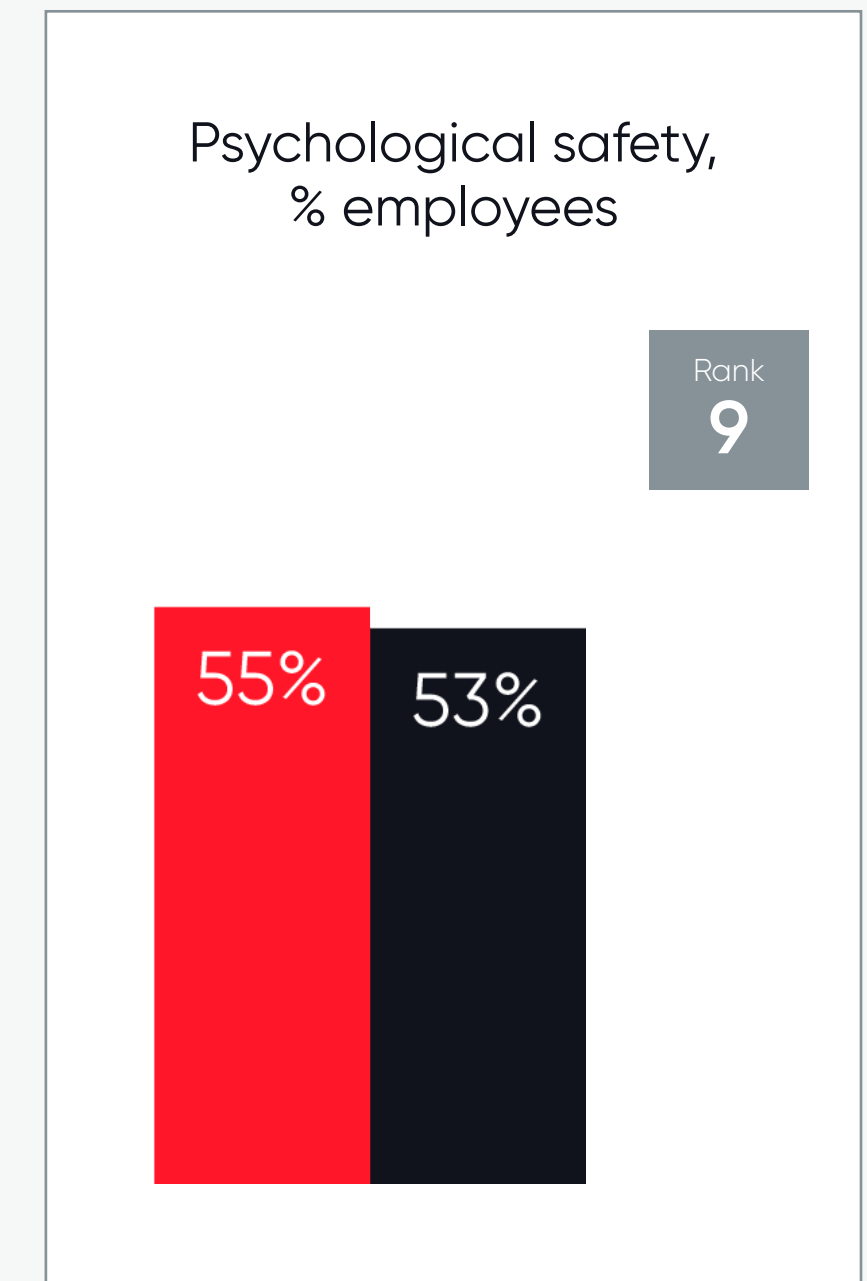
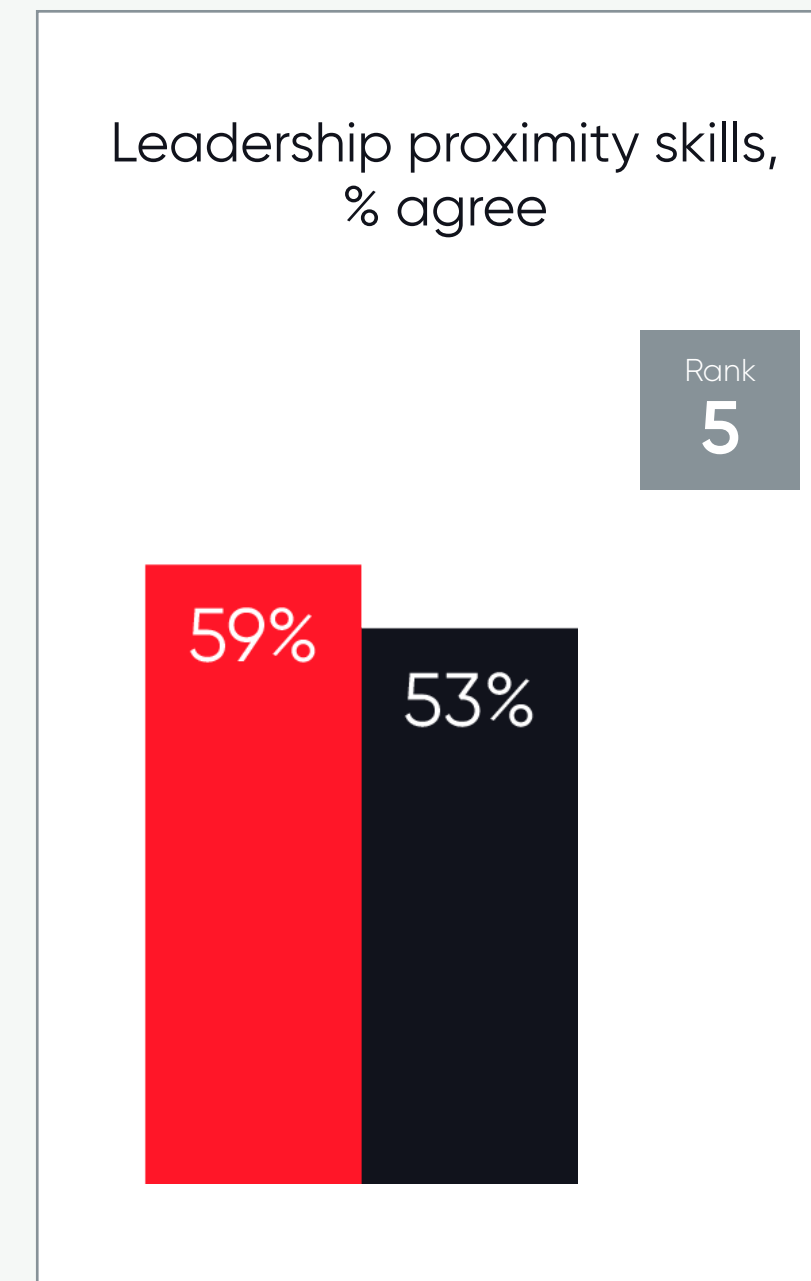
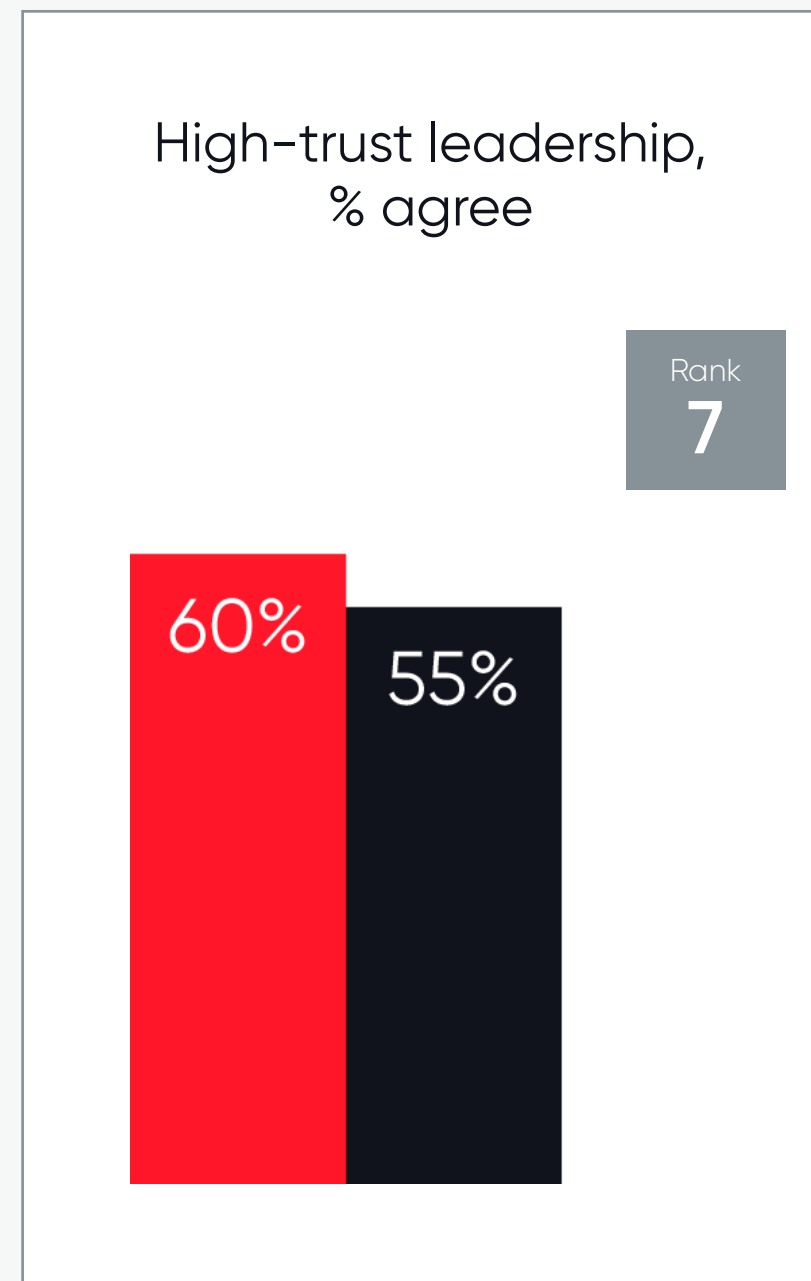
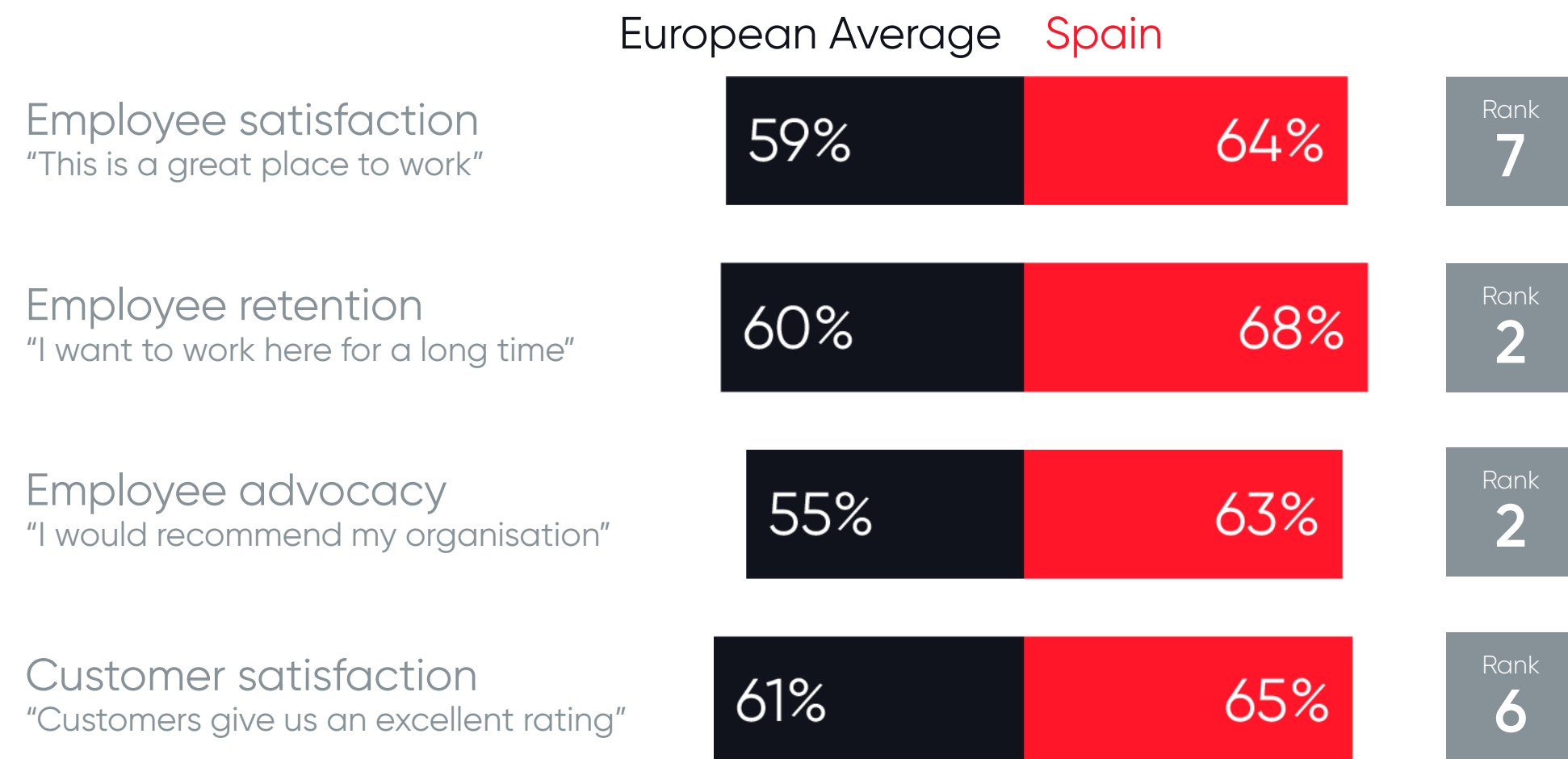
Rank is out of 20 countries

FOCUS ON
Spain



■ Spain
■ European Average

Business outcomes



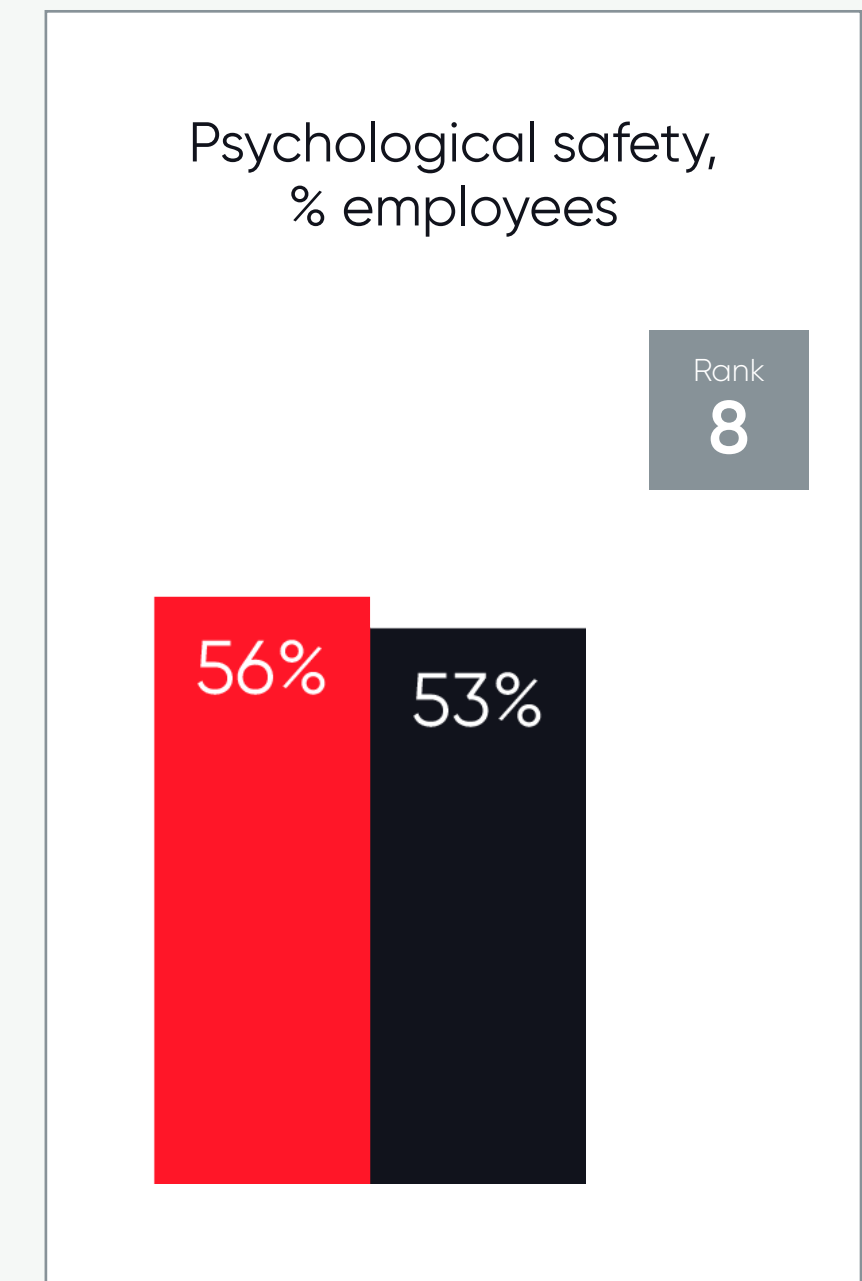
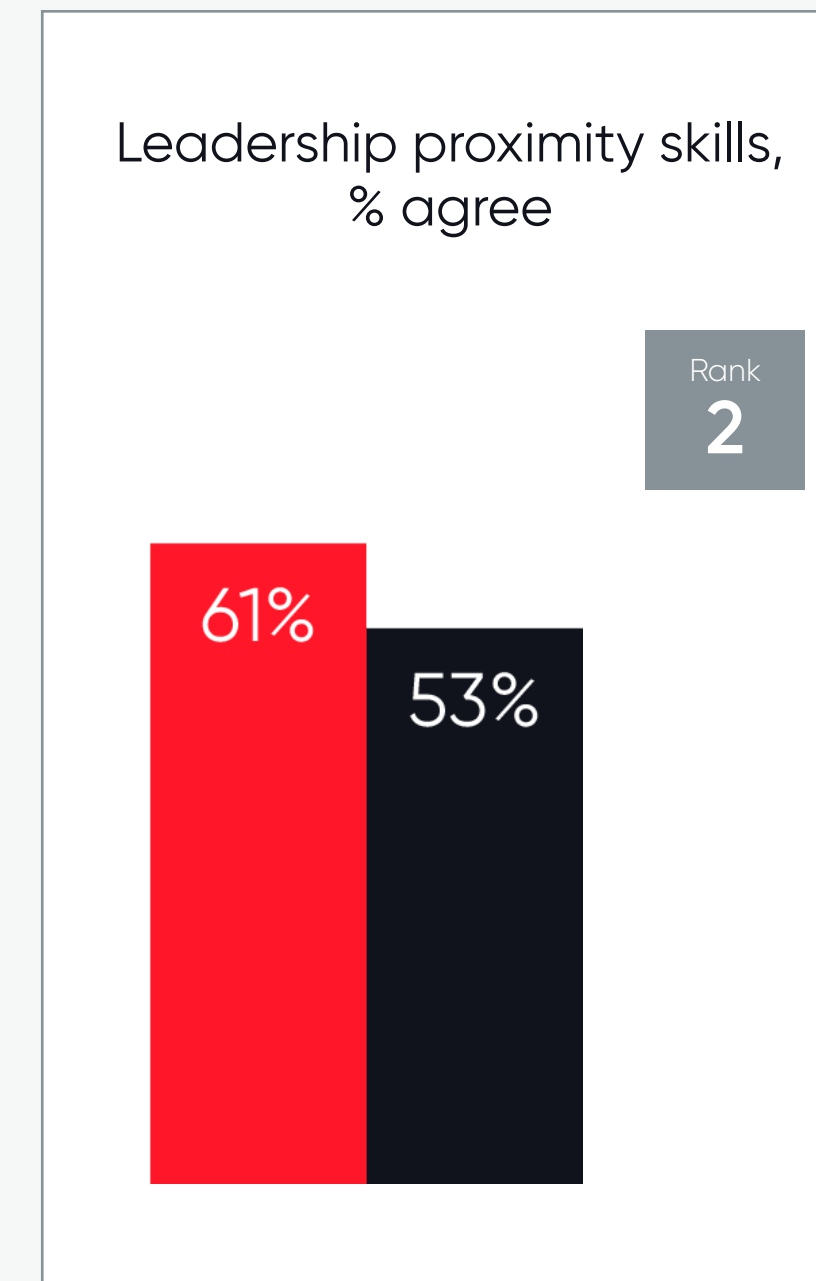
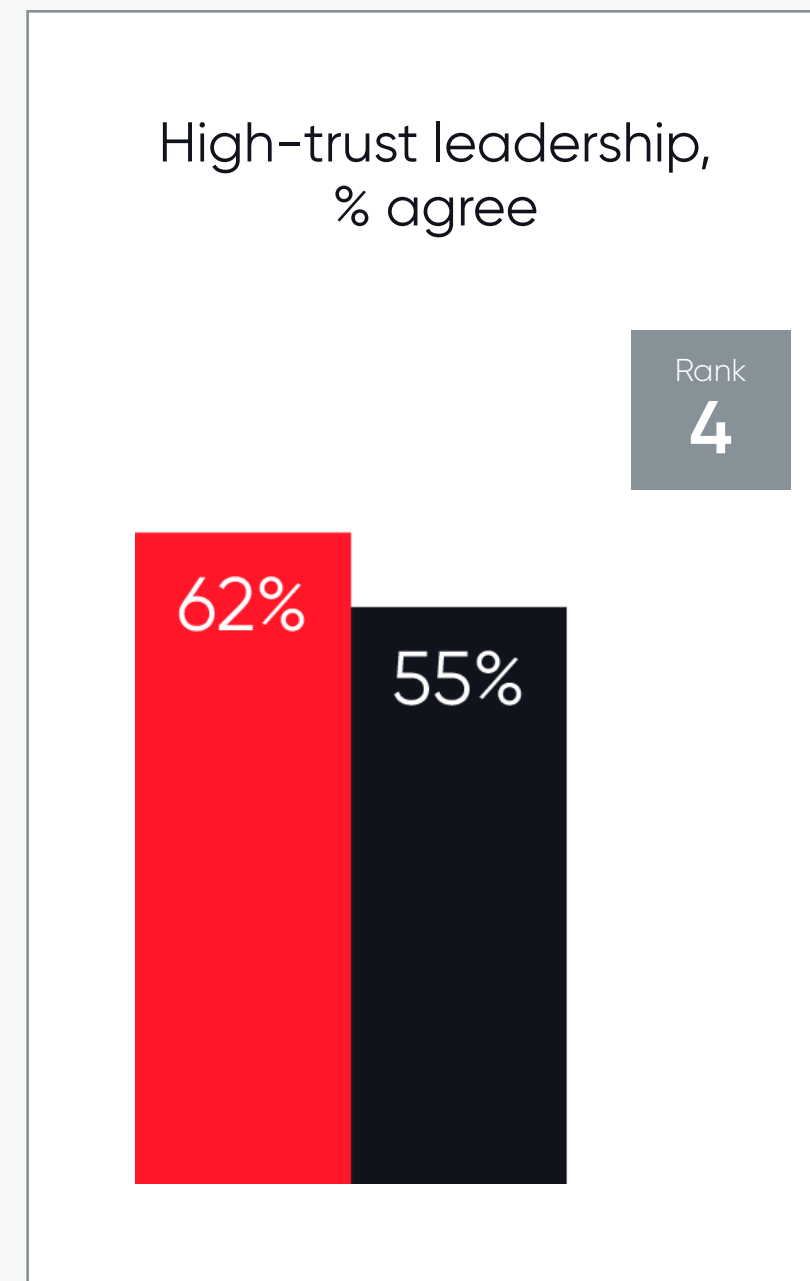
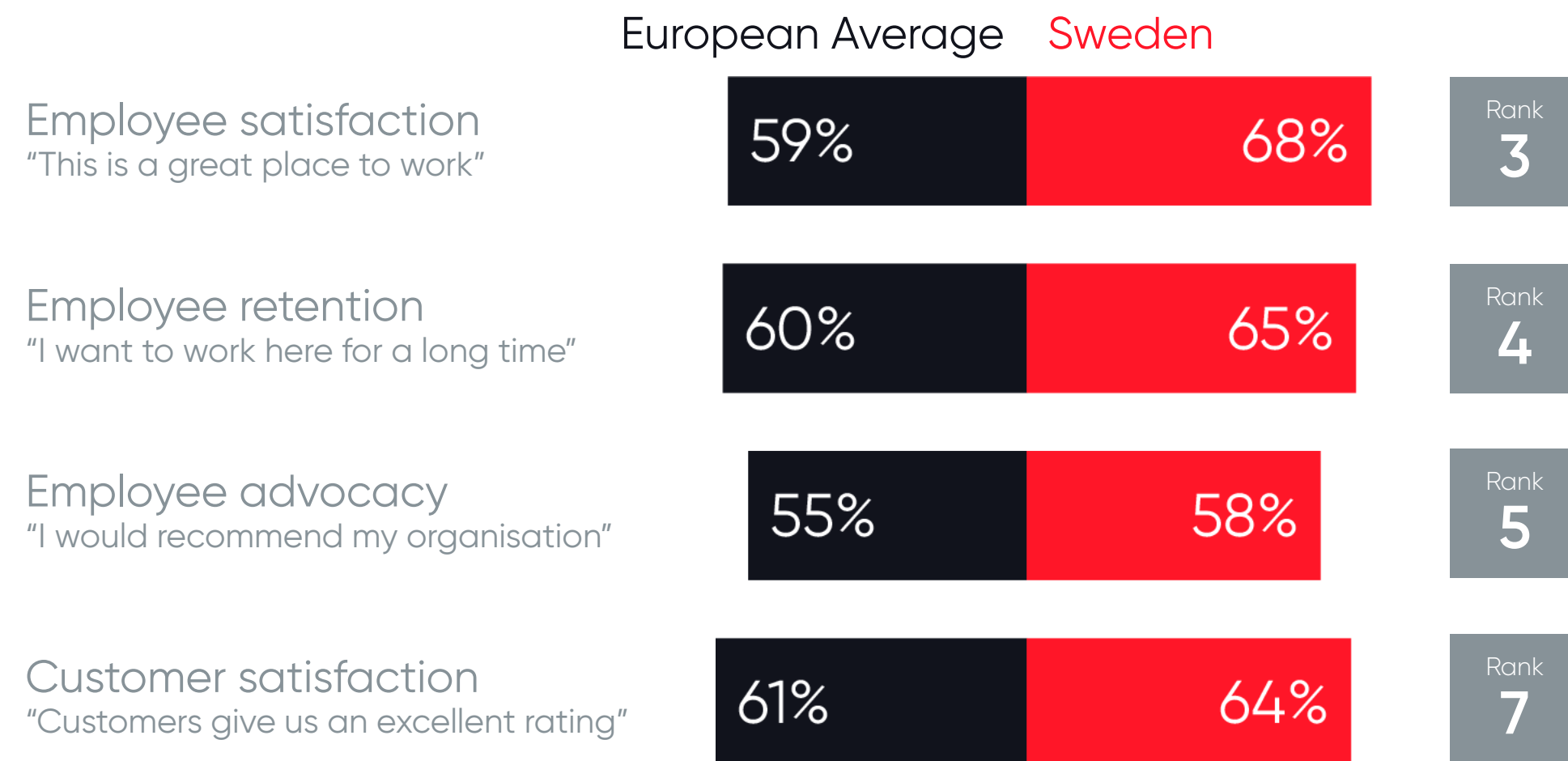
Rank is out of 20 countries

FOCUS ON
Sweden



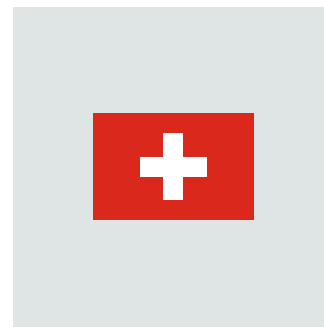
■ Sweden
■ European Average

Business outcomes



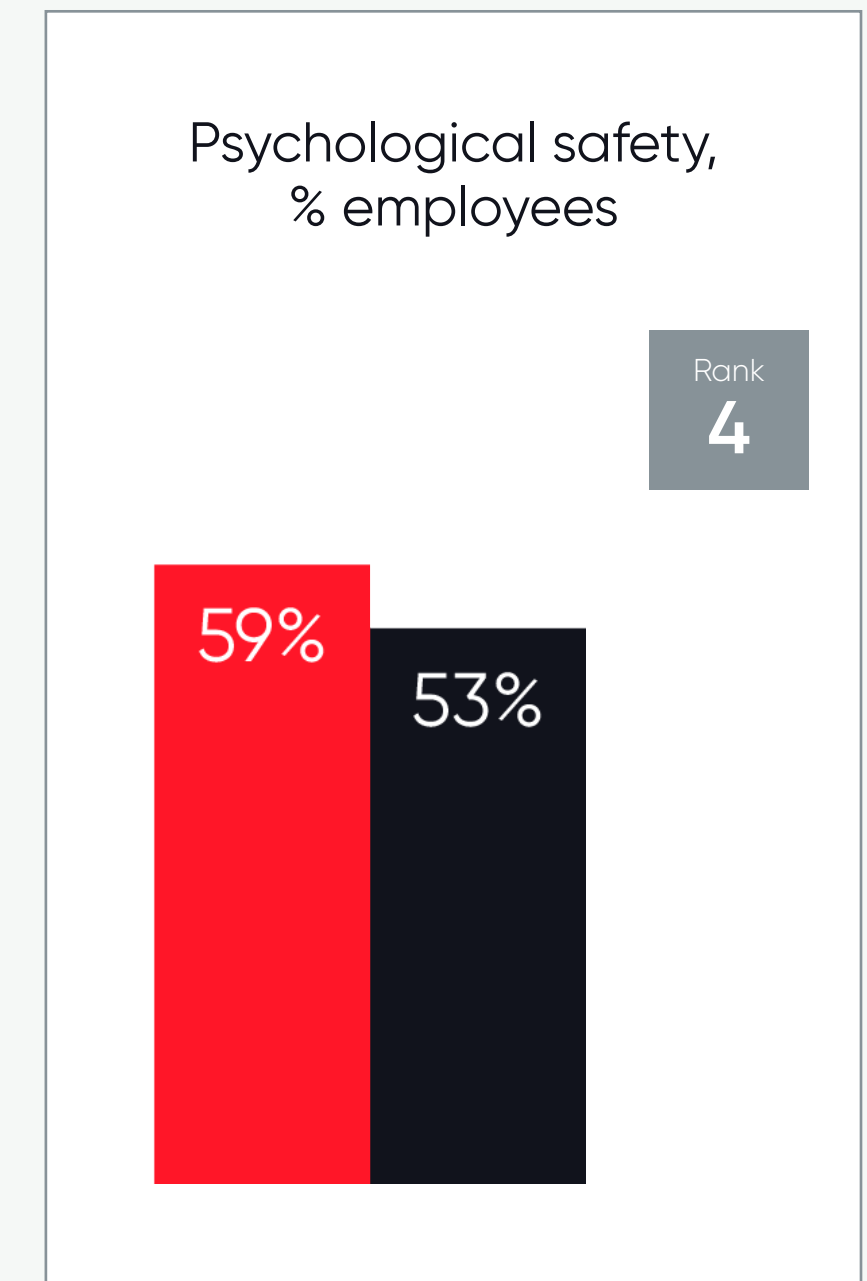
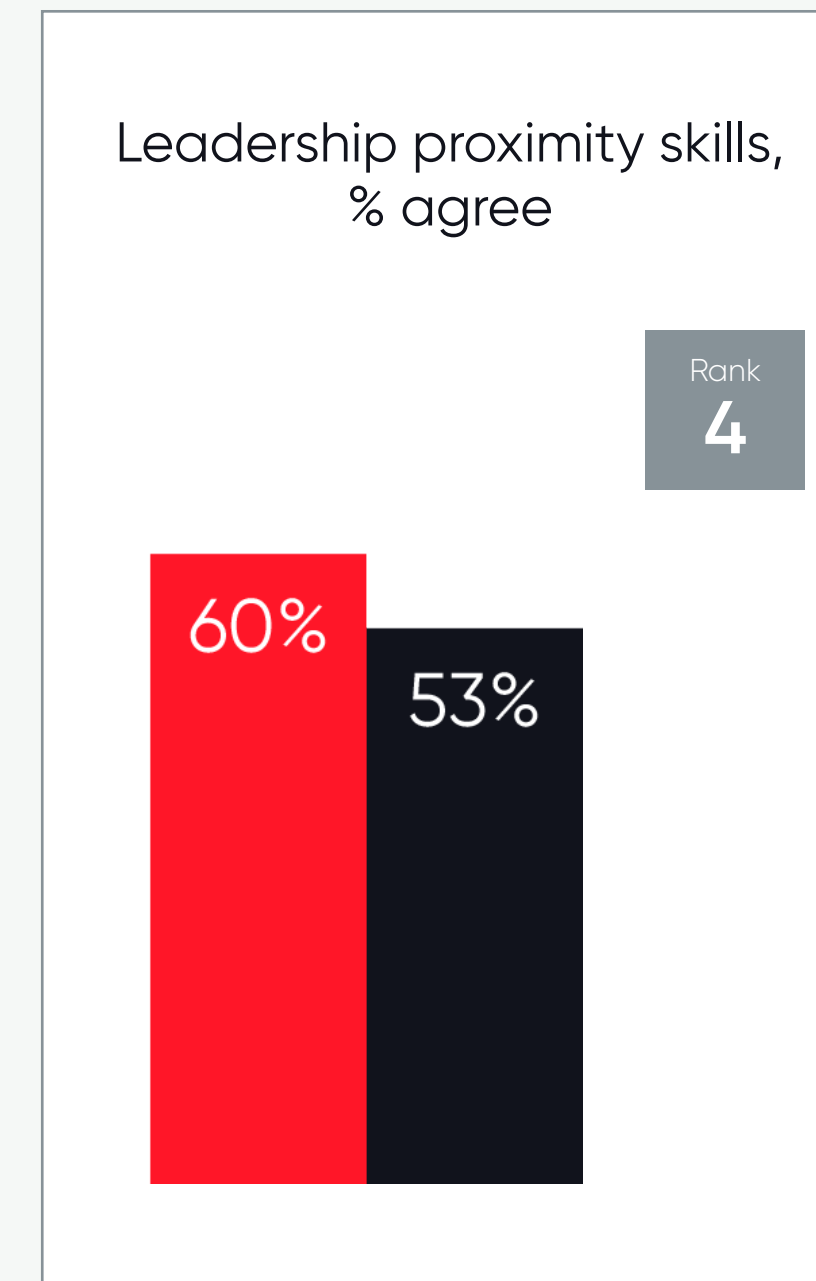
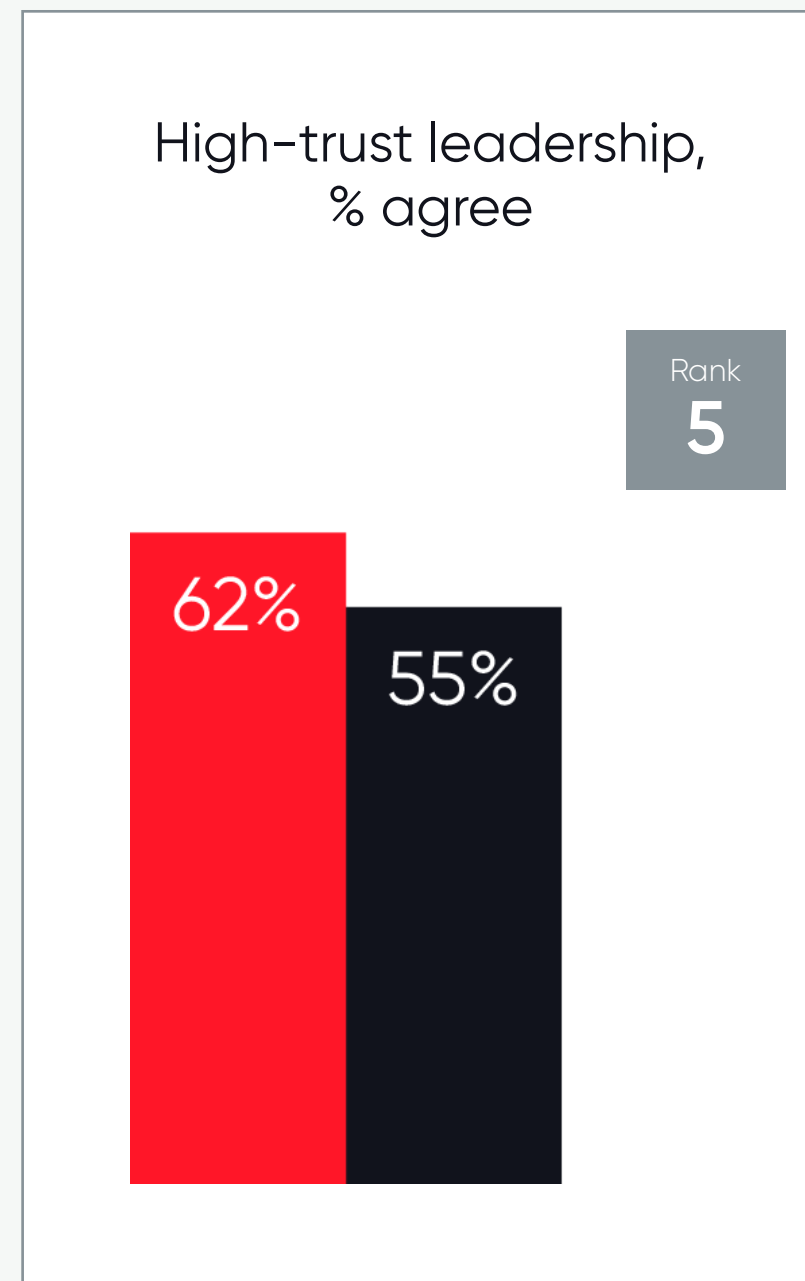
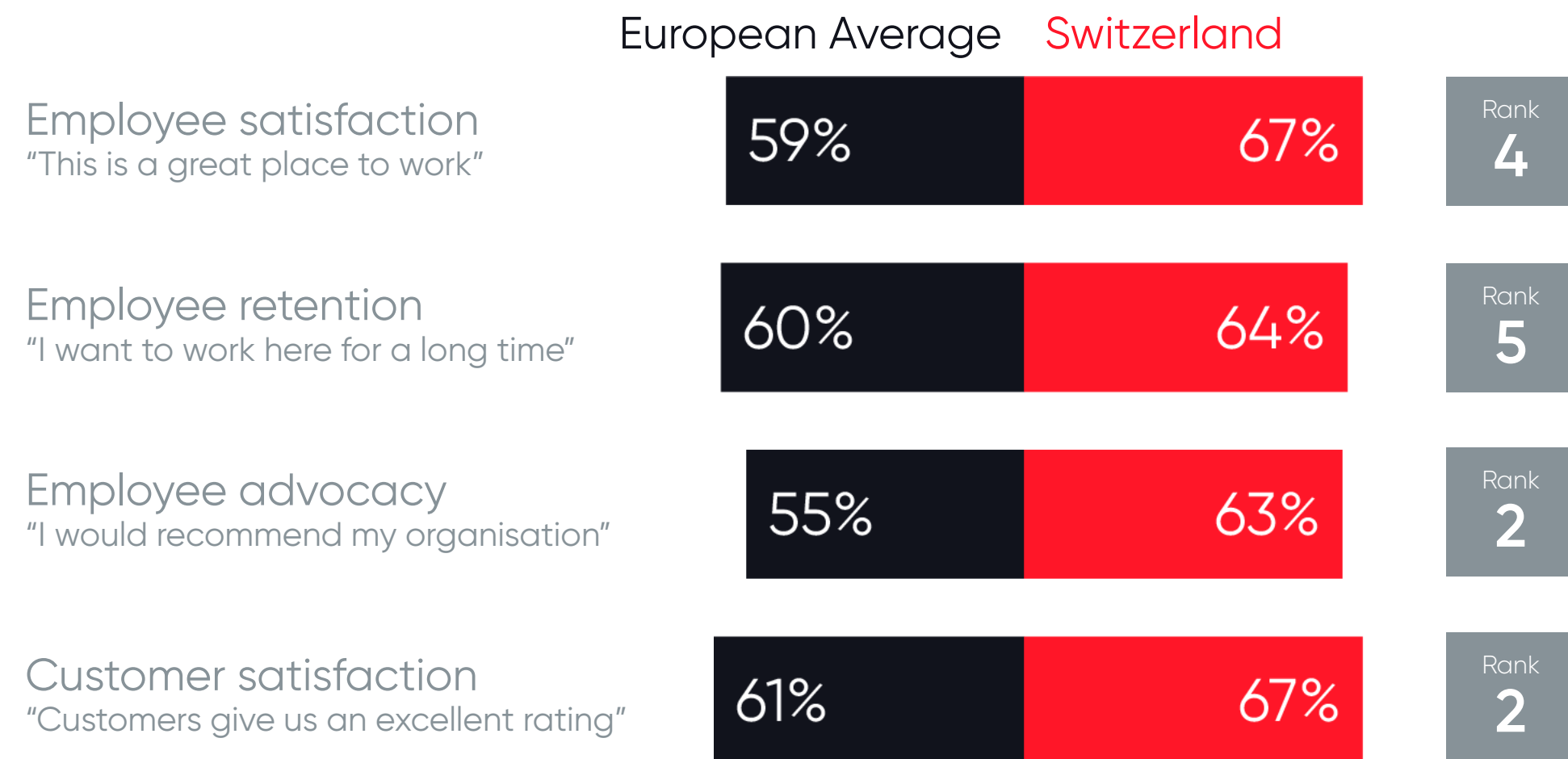
Rank is out of 20 countries

FOCUS ON
Switzerland



■ Switzerland
■ European Average

Business outcomes



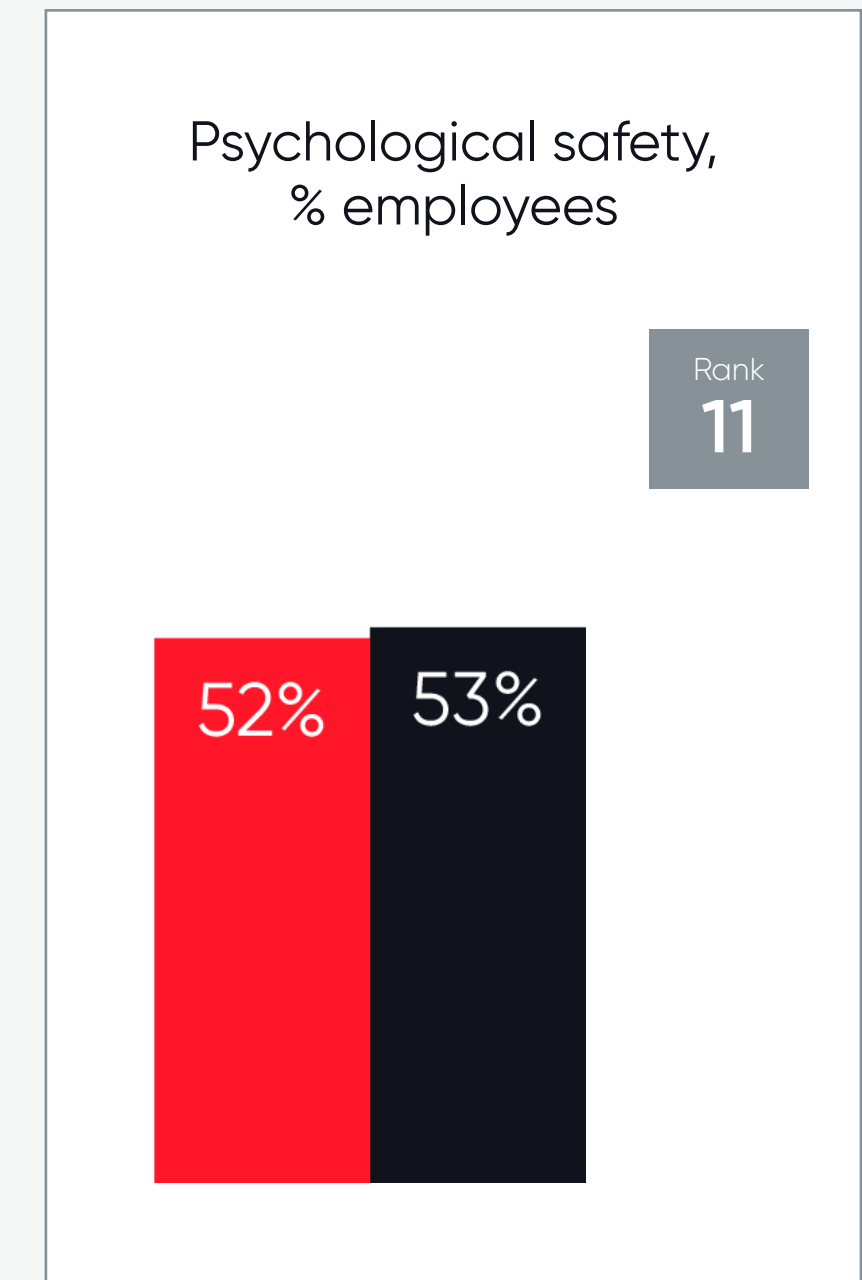
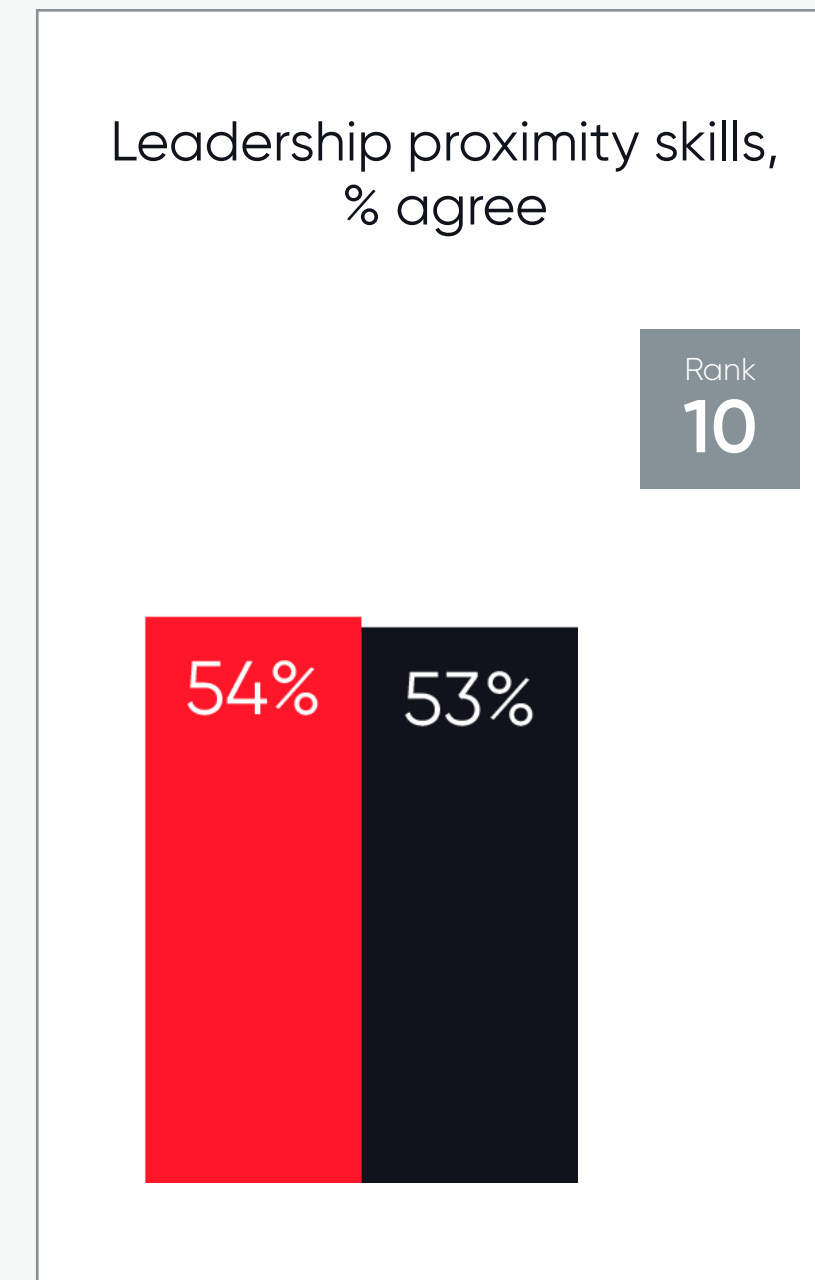
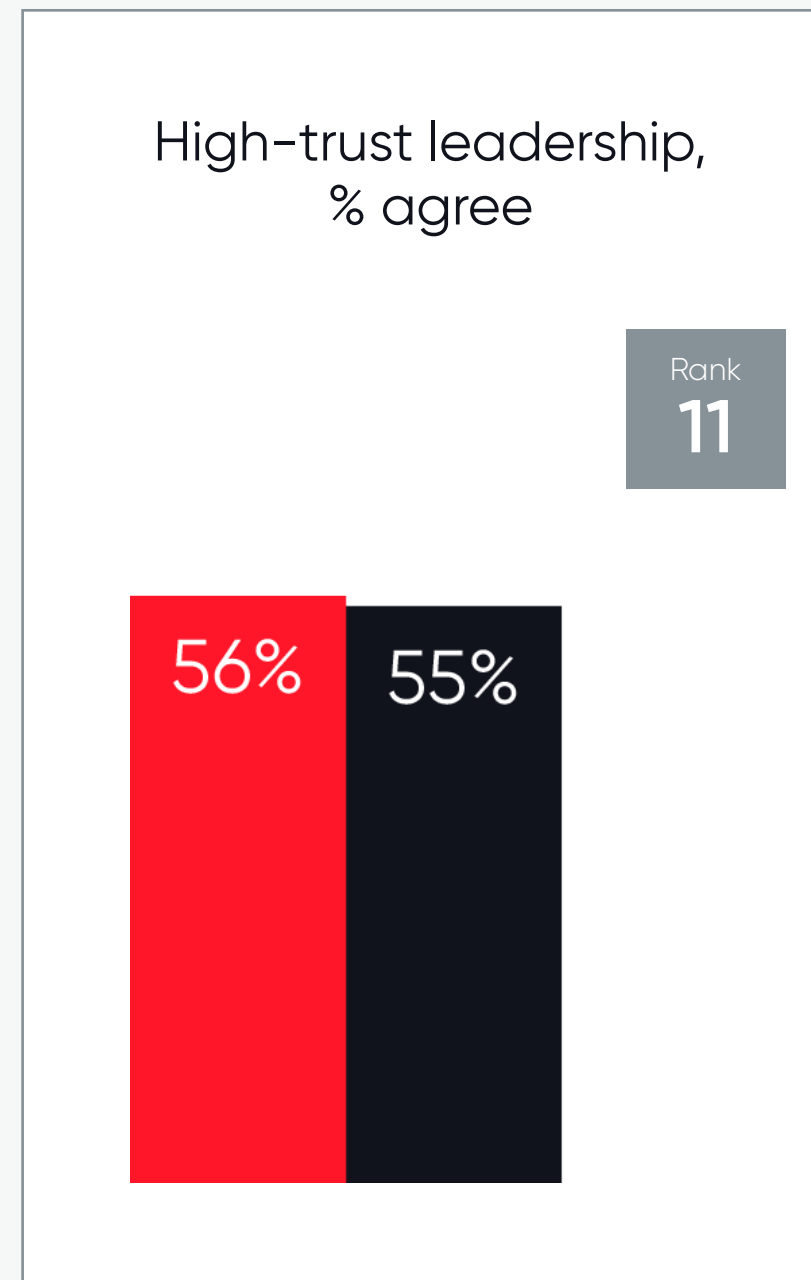
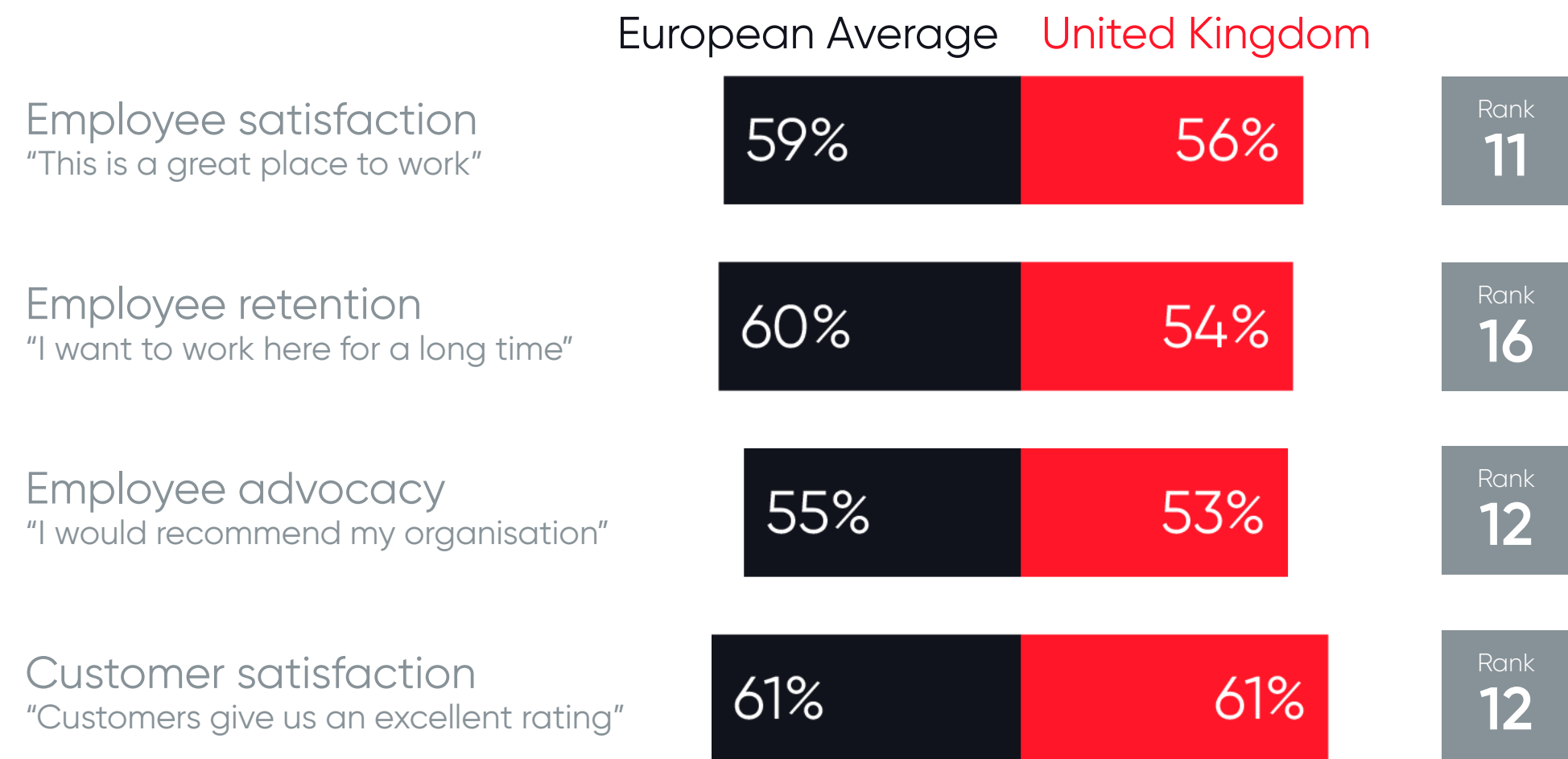
Rank is out of 20 countries

FOCUS ON
United Kingdom



■ United Kingdom
■ European Average

Business outcomes



Rank is out of 20 countries



European Workforce Study 2025

ABOUT

Great Place To Work

The global authority on workplace culture

With more than 30 years experience working with 15,000+ organizations annually, Great Place To Work offers unparalleled data and benchmarking assessing corporate leadership and culture, the most respected workplace certification, and industry leading research and insights.

Mission driven

Through hundreds of thousands of surveys, and thousands of hours of interviews and focus groups, Great Place To Work has decoded the DNA of great workplaces and set out on a mission to change the world of work. Providing leaders and organizations with the tools, insights and recognition to create a consistently and overwhelmingly positive employee experience, to foster more resilient, successful, sustainable workplaces.

For more information or further access to data and analysis, please contact your national Great Place To Work office or contact us on the web:

www.europeanworkforcesurvey.eu

ABOUT

The Survey

The core statements in the survey are based on Great Place To Work market leading Trust Index[®] Survey.

In total the survey included 80 Likert scale statements, 60 of which were covering workplace culture and leadership and 20 covering ESG, AI, and hybrid work.

The survey was conducted by Opinion, Norstat and Dynata as a written survey to 24,938 European respondents, selected by quotas to ensure full representativity.

ABOUT

The Team

Tron Kleivane is Chairman of Great Place To Work Norway; Alessandro Zollo and Jullien Brezun are CEOs of Great Place To Work Italy and France respectively; Claire Knights is CMO (UK) in Great Place To Work UK; whereas Ozoda Muminova is a Data Consultant, Jonathan Wichmann is a Marketing Consultant and Colin Brosnan is a Design Consultant working with Great Place To Work.