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Transforming happiness management in Spanish SMEs: the role of consultants

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This research project was born out of a consultancy endeavor, responding to the emerging trend in the Spanish market towards adopting well-being and happiness initiatives within companies. Its primary aim is to develop a formal framework for a happiness management certification explicitly tailored for Spanish SMEs, with the indispensable assistance of external consultants. A mixed-methods approach combining quantitative and qualitative techniques has been employed to achieve this objective, ensuring a comprehensive and multifaceted analysis. The study unfolds through sequential phases, commencing with an exhaustive review of existing literature, followed by a quantitative assessment to gauge the happiness levels among the workforce nationwide. Additionally, semi-structured, in-depth interviews with experienced practitioners were conducted to refine the proposed framework, emphasizing the significance of corporate social responsibility and the promotion of internal and external happiness. The outcome of this endeavor is a structured consulting framework designed to facilitate the attainment of a Happiness Management Certificate within SMEs. This underscores the pivotal role of management consulting in fostering the dissemination of valuable and groundbreaking insights for SMEs to foster employee well-being with its myriad benefits and reinforce their competitive advantage. Moreover, it addresses the gap between large corporations and SMEs in accessing certified happiness management, obviating the need for cumbersome and expensive infrastructures through the guidance of adept consultants.

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Introduction

Given the market's highly competitive environment, companies' interest in caring for their workers has grown recently, becoming a fundamental element in company development, growth, and innovation. Wellness programs, happiness management, and corporate social responsibility programs are all fundamental tools today (Li 2020).

If we look at the data shown in the Spanish Center for Sociological Research's study in 2021 (CIS 2021), we see that the working class has been more affected by the COVID-19 pandemic in their mental health than the non-working class. This has alerted companies to adjust their wellness and happiness programs further and to continue to work on this aspect as a fundamental element of development and a strategic component of their organizations. This positively impacts the organization by attracting, developing, maintaining, and retaining talent, resulting in improved productivity (Bonsu 2020). Furthermore, the current COVID-19 pandemic profoundly impacts organizations worldwide as businesses and societies face their most significant challenges in decades (Bailey and Breslin 2021).

The scope of this study specifically focuses on Small and Medium-Sized Enterprises (SMEs), which represent a crucial component of the Spanish economy but often lack the structured processes and resources to implement happiness management practices systematically. While larger corporations have access to advanced frameworks and tools, SMEs face unique challenges such as resource limitations, lack of expertise, and the need to formalize well-being strategies. This research focuses on filling this gap in the context of SMEs, where it is necessary to have a model that aligns organizational processes with employee well-being initiatives. The study addresses the urgent need for these companies to compete effectively, improve workforce happiness, and foster resilience in the post-pandemic era by focusing on SMEs.

The key objective of this study is to propose a structured consulting framework that facilitates the attainment of the Happiness Management Certificate (CHM) for SMEs. This framework integrates key components such as employee well-being, corporate social responsibility (CSR), and measurable performance indicators, ensuring that happiness management strategies produce tangible benefits. Specifically, the framework will (1) offer SMEs clear guidelines for implementing happiness programs, (2) standardize processes to ensure consistency and effectiveness, and (3) provide tools to monitor and measure the impact of happiness management on employee engagement, productivity, and retention. By achieving this objective, the study supports SMEs in enhancing organizational culture and contributes to broader societal goals by prioritizing employee happiness as a driver of sustainable business performance. This objective arises based on the experiences of two authors who are part of the research. In the professional field, they provide these services, finding specific difficulties in their growth and implementation and not detecting an explicit and consensual frame of reference. The idea is to solve the different problems in their application and connect them with other areas in the organization.

To this end, this research begins with a review of the literature on wellness programs and happiness management, followed by quantitative research with data on happiness in Spain from the Center for Sociological Research in 2021, following previous research in the same place (Núñez-Barriopedro et al. 2020). After this, there is a qualitative orientation with in-depth interviews with companies in the sector. Next, we present the results. The paper ends with a discussion, conclusions, and specific proposals for the consulting sector.

Literature review

The health and well-being of workers have been of growing interest in the scientific literature and among practitioners due to the benefits it brings to companies and their workers. The International Labor Organization (ILO 2014) already emphasized that companies should promote and maintain the highest degree of physical, mental, and social well-being of employees in all jobs; prevent any damage to their health; protect them in their employment against risks resulting from agents harmful to their health; and place and offer them employment appropriate to their physiological and psychological aptitudes; in short, adapt work to people and each person to their activity.

Moreover, in recent years, happiness management has emerged as a step-in companies' philosophy to care for their employees. This concern for employees' happiness and mental health has increased not only in the COVID-19 era but also in the post-COVID-19 era. This is because employees are suffering very negative consequences in their mental health and well-being (Yıldırım et al. 2021), and these consequences are especially detrimental to companies.

Happiness management emphasizes creating workplace conditions that foster employee satisfaction and well-being. Large companies often implement advanced strategies backed by significant resources, such as comprehensive Human Resources (HR) tools, coaching programs, and digital platforms for employee engagement. For instance, digital tools incorporating gamification and coaching features enable large firms to effectively promote and monitor workforce happiness in Industry 4.0 environments (Salvadorinho and Teixeira 2023; Núñez-Sánchez et al. 2024). These systems ensure structured and measurable approaches to enhancing employee well-being.

In contrast, SMEs face limitations such as financial constraints and smaller HR departments, yet they often excel in fostering a personal, human-centric culture. Even without explicit strategies, SMEs achieve positive outcomes through informal practices, such as recognizing employees' contributions and building strong interpersonal relationships. Research indicates that SMEs benefit from increased employee motivation, productivity, and stronger customer relations despite the absence of formal happiness management frameworks (Barbosa et al. 2023).

Ultimately, while large firms focus on systemic and resource-heavy approaches to happiness management, SMEs can leverage the flexibility and close-knit environments to nurture employee happiness. By implementing tailored formal or informal strategies, large companies and SMEs can significantly improve workplace satisfaction and organizational success (Firmansyah and Wahdiniwati 2023).

Happiness management has gained traction globally, especially within the SME context, as organizations strive to foster employee well-being while enhancing productivity and innovation. A recent study in India highlights that happiness management frameworks, originally developed in Spain, can be successfully applied in culturally similar collectivist economies. Indian SMEs are tapping into workplace happiness as a competitive advantage, emphasizing the importance of cultural adaptability and leadership in implementing such strategies effectively (Human Resource Management International Digest 2020). Similarly, Ravina-Ripoll et al. (2021) explored happiness management in Spanish SMEs, revealing that aligning brand orientation with happiness initiatives can enhance organizational sustainability and employee satisfaction (Ravina-Ripoll et al. 2021). However, despite progress, Spanish SMEs often lack the formalized frameworks required to implement and measure these strategies compared to larger enterprises.

Globally, organizational happiness has also been linked to the United Nations' Sustainable Development Goals (SDGs), emphasizing well-being as a driver of corporate success. Research across Chile, Colombia, and Spain reveals that fostering organizational happiness contributes to sustainable workplaces, particularly in higher education institutions, through dimensions such as engagement, recognition, and positive relationships (Munar et al. 2020). In contrast, SMEs in Spain face challenges in fully integrating happiness management with broader sustainability goals, often due to limited resources and expertise. Additionally, López-Ruiz et al. (2021) examined the relationship between happiness and quality of life in Spain, highlighting the critical role of job stability and organizational culture in influencing worker happiness, particularly in the aftermath of the COVID-19 pandemic (López-Ruiz et al. 2021).

The well-being of workers in organizations. The health and well-being of employees are the result of a balance of physical, mental, and social components, as well as health habits related to good physical condition, energy, and vitality (Basińska-Zych and Springer 2021). The workforce's health is essential to a company's long-term success, and workers' health is a strategic element in managing human resources (Sparling 2010). The well-being of employees is a critical factor in achieving the organization's success (Page and Vella-Brodrick 2009).

Companies want their employees to be in good health as it has been shown that they are more productive and have lower absenteeism (Mujtaba and Cavico 2013). It is in the interest of any company to have a healthy workforce, as it helps their employees' work engagement and improves their productivity, having the potential to improve the company's profitability and helping to achieve other organizational goals (Kent et al. 2016).

In recent times, there has been a worldwide pandemic that has had devastating consequences for employee health. The worsening of their health has been very considerable, with one-third of workers in Spain stating that their general health has worsened during the pandemic (Salas-Nicás et al. 2021). It is important to note that this pandemic and the teleworking situation is having negative consequences not only for the physical but also for the mental health of employees (Núñez-Sánchez et al. 2021).

Likewise, the expansion of teleworking derived from the pandemic has also caused reductions in the physical activity of workers that can influence the effectiveness of work and a worsening of their well-being (López-Bueno et al. 2020); this is very worrying for companies. Well-being is also related to happiness, as many researchers refer to happiness as subjective well-being (Zelenski et al. 2008). In this sense, it can be established that happiness emerges strongly and is closely related to well-being. The basis of happiness is found in inner well-being and mental health (Diener et al. 2010), which, as we have seen, has been affected by the pandemic. Therefore, in the post-pandemic and teleworking era, it is more than necessary and advisable for companies to be concerned about the health and well-being of their employees as it will result in multiple benefits for the company.

Happiness management. The scientific community's interest in the management of happiness in organizations has been growing over the years. However, in Spain, it is a relatively new concept (Jambrino-Maldonado et al. 2022). Organizational happiness appears as one of the most representative elements of a new trend in organizations, in which a growing concern of managers for the conditions of employees is perceived (Mendoza-Ocasal et al. 2021).

The management of employee happiness has recently become a competitive strategy for companies due to the multiple benefits it brings inside and outside the organization. Thus, happiness at work is an important issue for companies, with worker happiness being a determining factor of their short- and long-term efficiency. Among the measures of happiness at work, there is a diversity of constructs, the most widely used of which is job satisfaction, with happy workers having a high level of job satisfaction (Frey 2020).

The recent scientific literature has shown that happy workers are more productive, resourceful, and loyal to their employers. Yet the personnel policies observed in companies do not seem to consider the benefits of having happy employees (Ravina-Ripoll et al. 2021). These happy workers also present a greater predisposition to improve their professional qualifications and work in a team and as a team, all with a high level of job satisfaction (Frey 2020). Workers' happiness, joy, satisfaction, and motivation are not only consequences of management that achieves positive results but precisely the path toward them (Foncubierta-Rodríguez and Sánchez-Montero 2019).

Considering the pandemic and post-pandemic effects on the mental health of workers and taking into account the time we spend at work, workers' happiness emerges as a fundamental pillar to achieving the personal well-being of our employees. This factor is particularly relevant in the post-COVID-19 era.

Given the above, it is unsurprising that large multinationals act to increase their workers' motivation and psychosocial well-being (Ravina-Ripoll et al. 2021). However, this does not occur in SMEs, probably due to their lack of financial, material, and human resources to perform these actions. Among the necessary human resources to carry out this happiness management, we find the figure of the Chief Happiness Officer. The philosophy of happiness management through the Chief Happiness Officer and transformational leadership positively influences workers' subjective well-being (Hassani 2017).

Organizations must first know how to foster happiness, and after this, they will obtain all the positive outcomes associated with happiness at work (Bastos and Barsade 2020). Considering the benefits of happiness management and that it is a strategy which, according to various authors, is limited to being applied by large multinationals with abundant resources, it could be inferred the opportunity within the human resources consulting business to offer these services to SMEs. This would include advice and accompaniment for obtaining a formal certificate to ensure a proper implementation given the various problems we encounter.

Happiness management certification model. An exhaustive review of the literature and practice in this field has been carried out to find a happiness management certification model that could help companies, with or without the advice of a consulting firm. Being a relatively new field in Spain, finding a certificate in the literature has not been easy. Throughout this search concerning existing business certifications, it is emphasized that this process should not be a mere bureaucratic procedure that helps the company's image (Martínez-Costa et al. 2008) but rather a means, a tool to achieve, in our case, effective happiness management.

Moreover, this tool should become part of the innovative strategy for human resources management, which helps to achieve the happiness of workers in the post-COVID-19 era from the perspective of happiness management (Kamel et al. 2017). For all these reasons exposed, Ravina-Ripoll et al. (2023), in the absence of a certificate of this type, concluded the convenience and need to start planning a quality seal that measures and guarantees a positive climate in organizations,

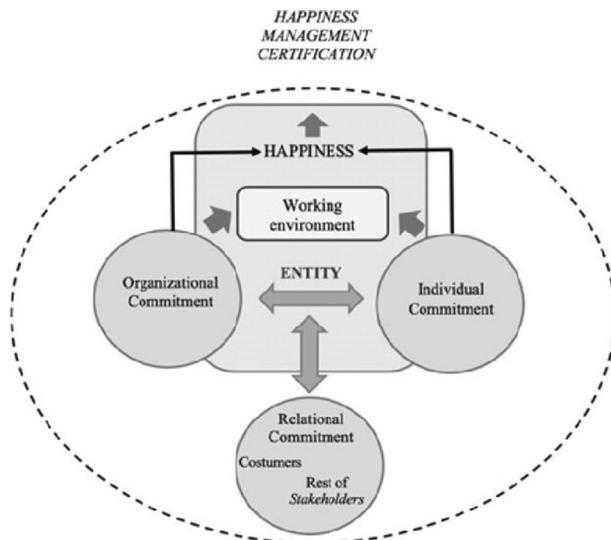


Fig. 1 Generating a model of CHM applying happiness management.

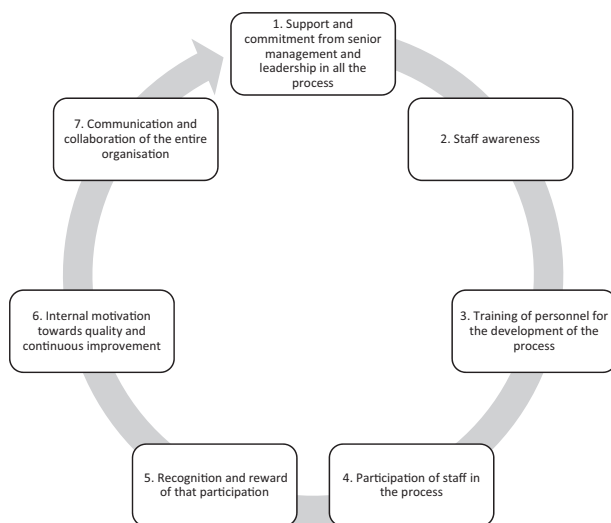


Fig. 2 Series of factors needed to show the true philosophy pursued by the entity to achieve the certificate.

called “Certification of Happiness Management” (CHM). This instrument can become an attractive and innovative axis for managing human resources in the comprehensive search for the corporate happiness of workers in the post-COVID-19 era.

This is the certification model chosen by the authors to be applied in SMEs through consulting. Figure 1 shows the model and the underlying philosophy of CHM.

This model highlights the importance of the organization’s commitment and the internal and external customers and the rest of the stakeholders, all in a work environment that favors achieving the objective of Happiness of all the system components. The CHM is acquired as the culmination of the process.

Previously, it should be emphasized that it is essential for the whole process to be successful and that behind it all, there is a valid philosophy, led by the leaders of the company, and not just the Human Resources department, to place the worker at the center as the pillar of happiness management, and for this, we will use the process of implementing the certification as a means to achieve it and not as an end in itself. There are also several key

factors for success in obtaining a certificate of this type, which can be seen in Fig. 2.

Once the happiness philosophy has been implemented throughout the company, as well as the processes leading to obtaining the certificate, we can affirm, following Ravina-Ripoll et al. (2023), that these organizations are characterized by having achieved strengths that will be pillars for the organization: listening to the emotions of their internal customers, and possessing a transformational leadership style that focuses on innovation, training, and corporate welfare. These pillars on which this happiness management is based will strengthen the company, making it more efficient to take advantage of the environment’s opportunities and face its threats, such as those generated by the current pandemic, with greater success.

Before implementing the Certification model, the researchers, who are also consultants in corporate well-being and happiness, have decided to evaluate the process, components, and phases with those responsible for Happiness in companies that, in one way or another, have been applying happiness policies to assess it from a qualitative point of view.

For all the above analyzed and commented on, the main objective of this research is to determine the characteristics that a Happiness Management Certificate in Spain should have. The intention is to standardize the process, emphasizing SMEs as a market opportunity for the consulting sector since these companies have smaller structures and fewer resources than large companies.

According to the latest data from the National Institute of Statistics (INE, 2021), SMEs comprise 97% of companies in Spain, a percentage that marks the predominance of micro-enterprises, which constituted 94% of private sector companies in January 2020, with a total of 3,417,000 companies. Corresponding to June 2022, there are 2,935,000 SMEs in Spain, counting all categories. However, they still comprise almost the totality of the business fabric, reserving a spectrum of 0.17% for large companies.

The specific objective is to evaluate the level of happiness of the working class in Spain, based on research conducted by the CIS in 2021, and to compare it with that of the non-working class.

Research Methodology

A sequential mixed-methods approach combining quantitative and qualitative methods has been employed to achieve the research objectives. This design ensures triangulation of results, enhancing the study’s rigor and consistency (Patton 2015). Specifically, the research follows a phased structure, where the qualitative phase builds upon the findings of the quantitative phase. Such a model helps contextualize and deepen the understanding of happiness management between large companies and SMEs (Punch 2014).

The mixed-method model involves a two-phase sequential design:

1. Quantitative Phase: Analysis of existing survey data to assess happiness levels among workers.
2. Qualitative Phase: Semi-structured interviews with HR managers and employees to explain and expand on the quantitative findings, thus using a non-experimental parallel method with a single measurement on participants from the qualitative perspective adjusted to the objective of study (Ballester 2001), as it is the reality described by the participants (Patton 2015).

This combination enables a holistic exploration of the research gap: the underrepresentation of happiness management in SMEs compared to large companies. This research was organized into the following phases:

1. Phase 1: Literature Review – A thorough analysis of happiness management practices, focusing on SMEs and large companies.
2. Phase 2: Research Objective Determination – To examine the disparities in happiness management implementation between SMEs and large companies.
3. Phase 3: Methodological Design – Development of a mixed-method sequential model.
4. Phase 4: State-of-the-Art Analysis – Review of Happiness Management Certification and Implementation Trends in Spain.
5. Phase 5: Quantitative Study – Analysis of the CIS 2021 Mental Health Database to measure happiness levels among Spain's working population.
 - a. Sample: 2481 individuals (1708 workers, 773 non-workers).
 - b. Technical Parameters:
 - i. Population: Spanish residents aged 18 +.
 - ii. Sampling: Simple Random Sampling (CIS, 2021).
 - iii. Error Margin: $\pm 1.8\%$ for a 95.5% confidence level.
6. Phase 6: Qualitative Study – Semi-structured interviews with employees and HR managers, ensuring alignment with the research gap and objectives.
 - c. Participants: Employees and HR managers from SMEs and large companies.
 - d. Interview Guide: Structured into three sections: context, central topics (happiness programs), and conclusions.
 - e. Data Collection: Two face-to-face interviews (12/01/2022–12/15/2022) at company headquarters in Spain.
7. Phase 7: Data Integration and Analysis – Triangulation of quantitative findings with qualitative insights to identify gaps and comparisons in happiness management practices.
8. Phase 8: Conclusions and Practical Applications – Proposals for SME-specific frameworks to implement happiness management effectively.

To develop the quantitative research phase, we have chosen to work with the database of the Center for Sociological Research (CIS) in Spain, with a sample of 2481 individuals in 2021, to verify the level of happiness of the working population in Spain. It should be noted that for reasons of dealing with the labor field, the researchers have focused on the working class. The active

population in Spain in 2021 is 23,365,380, while the number of employed people is 20,320,000 so, in 2021, the activity or occupation rate is 58.6%, with an unemployment rate of 13% Table 1.

Concerning the sample description, we observe 2481 individuals, of which 1708 are workers, and 773 are non-workers, representing 31% of non-workers versus 69% of workers. Regarding sex, 52.23% are men versus 47.48% women. If we break this down by sex and employment status, we see that 71% of men are workers compared to 29% of non-workers. As for women, the proportion is very similar to that of men, with 66.66% of workers compared to 33.44% of non-workers.

A guide of questions structured in three parts was prepared to develop the qualitative research phase and based on a thorough literature review on the current situation of implementing employee happiness and well-being programs in companies in Spain (Ruiz-Blázquez 2015). The first part is generic to contextualize the interview, the second part is the central axis, and the last part is the interview's conclusion. As for the selection of companies and experts, several international companies from different sectors were selected, and the HR manager of the organization was proposed for the interview.

Specifically, two face-to-face semi-structured interviews were conducted between 12/01/2022 and 12/15/2022 at the companies' headquarters. The companies are in different sectors, such as production and services, and their headquarters are in Spain.

Results

To better understand the main results obtained, we will first comment on the quantitative data, followed by the qualitative data. This approach integrates a holistic perspective that matches our goals and increases our understanding of the need for certification in SMEs based on the current environment and the needs of the human talent inside the organizations.

To interpret the quantitative results obtained in this work, we propose an exploratory statistical analysis of the happiness variable to check its normality. This is done with the Kolmogorov-Smirnov or Shapiro-Wilk test. After analyzing the results, we see that the happiness variable does not behave like a Normal in the test. Therefore, we will perform a non-parametric test as it is not normally distributed (Newbold 1998).

First, Tables 2 and 3 includes descriptive results for the two groups of participants, where a lower average rating (indicating lower happiness) was obtained in the sample of people who work (8.11 ± 1.407) compared to those who do not work (8.20 ± 1.658).

The results show us interesting information: in the year 2021, the working class in Spain was less happy than the non-working class, and if we analyze whether these differences are statistically significant from the non-parametric Mann-Whitney U test, as the p-value is less than 0.05 we can conclude that they are. This test also suggests a statistically significant difference in the happiness scores between those who work and those who don't, with non-working individuals reporting slightly higher happiness levels. However, the practical significance of this finding should be considered in the context of the actual difference in scores, which is minimal. Additionally, the analysis does not imply causation – it does not explain why non-working individuals report higher happiness, and other variables not included in the study could be influencing this result. These findings suggest further

Table 1 Technical sheet.

Field work	21st. to 30th. Oct 2021
Population	Population in Spain over 18 years old.
Population Size	40,377,885 (INE, 2021)
Sampling type	Simple Random Sampling
Sample size	2481 Individuals
Survey type	Computer-assisted telephone interviewing (Cati)
Sampling error	For a confidence level of 95.5%, $p = q$, the sampling error is $\pm 1.8\%$

Source: CIS (2021).

Table 2 Group statistics.

	About work	N	Average	Standard deviation	Average standard deviation error
Personal happiness scale (1-10)	Work	1705	8.11	1.407	0.034
	Don't work	769	8.20	1.658	0.060

investigation into workplace-related factors, such as work-life balance, mental health support, and employee engagement, that may explain why happiness levels among workers lag slightly behind those of non-workers.

The main results of the interviews with the experts are described below for the interpretation of the qualitative results. Specifically, in Table 4, we show the in-depth interview results, exposing the key phrases that relate to the primary key results of the interviews.

In organizational development discourse, a concept known as “Happiness Management Certification” (CHM) has emerged, capturing the attention of corporate leaders and human resource professionals. This innovative certification, as indicated in qualitative data, is not merely a transient trend but a necessary

evolution in the workplace environment, according to testimonials from company executives. Table 4 consolidates these testimonials into a coherent narrative that underscores five critical achievements of the certification’s implementation.

The results obtained through in-depth interviews with company leaders and HR managers highlight the transformative role of CHM in fostering a positive organizational culture. CHM is no longer perceived as a fleeting trend but a strategic tool that meets employees’ post-pandemic demands for well-being and mental health programs. Executives emphasize that embedding employee well-being into organizational culture is a long-term effort, positively affecting employee motivation, engagement, and departmental performance. An employee-centric approach enhances organizational attractiveness, improving talent acquisition and retention.

First, it is important to consider that corporations prominently encourage a progressive organizational culture. The shift from viewing such cultural dynamics as an operational activity to recognizing them as a strategic managerial tool signifies a maturation in corporate thinking. The testimonials reveal that, although embedding this culture into companies entails effort, the resultant internalization over time fosters a sense of collective ownership. Secondly, the adoption of these cultural practices yields strong benefits. The narratives speak to the holistic betterment of organizational departments and highlight the centrality of employee well-being in corporate strategies. The emphasis on employee-centric philosophies correlates with

Table 3 Test statistics.	
	Scale of personal happiness (1-10)
Sample size	2481
U Mann-Whitney	613946,500
Wilcoxon W	2068311,500
Z	−2606
Asymptotic sign (bilateral)	0,009
Grouping variable: About Work.	

Table 4 Key achievements vs. examples of testimonial sentences.	
Examples of testimonial sentences	Key Achievements
• “We saw that it was a trend in the market, and we went for its implementation”. • “It started as a market trend, but it has become a necessity today, employees demand such programs from us.” • “It took us some work to implement, but after several years, this culture is being introduced in the company as our own.” • “We have observed an increase in mental health concerns among employees in the post-pandemic era.” • “After several years of work the road has not been easy, but we are already seeing the positive effects on the organization”. • “It was a wise decision to implement this type of activities and programs.” • “It has a positive effect on all departments in the organization.” • “Putting the employee at the center not only generates positive elements for the organization, but for the employee himself.” • “We generate a cultural change from within the organization itself, all together, company and employees, as a single unit.” • “A happy employee is more motivated, more engaged, so it also allows us to be more attractive to attract talent, but above all, to retain it.” • “We consider this type of certification necessary, as its implementation is not easy, since it is a cultural change”. • “Determining a minimum standard helps to homogenize and differentiate from those companies that have it in their DNA”. • “Any external help and proceduralization helps significantly to the success of the project.” • “It would break the barriers of those companies that do not know where to start, due to their lack of experience”. • “It’s important to take into account not only the internal customer, but also the external customer.” • “It would be necessary to incorporate and value the company’s CSR within the certificate, since neither the market nor the workers would understand a company that does not seek greater Happiness and Welfare of Society”. • “This aspect would also improve employer-branding and the company’s image”. • “We consider that it should reach all companies, I do not consider that it’s a situation only of the companies, but of the change in society.” • “Companies are the place where they spend a lot of time of their lives, these should be the channelers of that cultural change” • “It should be implemented in all sectors and all sizes”.	1. Encouragement of this type of organizational culture by companies. ● It has gone from being a fad to a strategic tool for organizations.... ● It also has a positive effect on the employees themselves, a fundamental part of their development. ● Mental health as a new pillar of organizational well-being. 2. Positive results in the organization. ● The implementation of these programs has a positive effect on the organization’s departments. ● It also has a positive effect on the employee himself/herself. ● Employee-centric philosophy 3. The need to implement Happiness Management Certification ● Distinctive stamp on the company, identifying and differentiating it from the rest. ● Helps the implementation and standardization of processes. ● Ensures a minimum standard for this type of organization. ● Improves the company’s external image and employer branding. 4. Assessment of the proposed Happiness Management certificate ● Including CSR aspects would improve the internal and external image of the company. ● This image of a socially responsible company, both internally and externally, would help improve the company’s bottom line. 5. Need to reach all companies. ● Cultural change is not only in companies but also in society. ● The company becomes a means for social cultural change. ● Need to reach SMEs, which make up 99% of the Spanish business fabric.

Table 5 Key Performance Indicators for CHM initial proposal.

KPI	Description	Implementation	Indication of Success
Employee Happiness Surveys	Measure overall happiness, satisfaction, and work-life balance among employees.	- Conduct anonymous surveys quarterly. - Use tools like Google Forms, SurveyMonkey, or HR software. - Include happiness scales (1-10) and satisfaction questions.	An increase in average happiness scores over time indicates improved workplace well-being.
Retention and Turnover Rates	Track the percentage of employees leaving the company annually and average tenure.	- Calculate turnover = (Number of departures / Total employees) × 100. - Use exit interviews to identify reasons for leaving.	Decreasing turnover and increasing average employee tenure signify improved job satisfaction.
Employee Performance Metrics	Measure productivity through task completion, project success, and performance appraisals.	- Monitor KPIs like task deadlines met, project outcomes, and quality of work. - Link performance reviews to happiness initiatives.	Improved task completion rates and higher-quality output indicate better engagement and focus.
Absenteeism and Presenteeism	Monitor missed workdays and productivity losses due to health issues or low morale.	- Calculate absenteeism rate = (Total missed days / Total available workdays) × 100. - Use self-reported presenteeism surveys.	Reduced absenteeism and presenteeism rates reflect improved physical and mental well-being.
Workplace Engagement	Evaluate enthusiasm, participation, and advocacy for the organization.	- Use engagement surveys (e.g., eNPS for willingness to recommend the workplace). - Monitor participation in team events.	Higher engagement scores and active participation indicate a positive and supportive work culture.
Talent Acquisition Metrics	Track recruitment outcomes, including job applications, referrals, and recruitment costs.	- Measure job applicant numbers, quality of hires, and referral rates. - Track employer brand reviews (e.g., Glassdoor).	Increased applicant interest, higher-quality hires, and improved brand reviews show CHM effectiveness.
Qualitative Feedback	Collect employee insights on happiness initiatives and areas for improvement.	- Conduct focus groups, interviews, and implement suggestion boxes. - Analyze feedback for recurring themes.	Positive feedback and actionable suggestions show alignment between initiatives and employee needs.
Financial Performance	Assess business stability through revenue growth, profit margins, and cost savings.	- Monitor operational costs, revenue growth, and savings from reduced turnover and absenteeism. - Analyze customer satisfaction.	Improved financial metrics demonstrate CHM's impact on productivity, stability, and competitiveness.

increased motivation, engagement, and talent retention (Perpétuo and Pestana 2022).

The third achievement involves the expressed need for a standard framework, provided by the Certification Happiness Management, to guide organizations through this transformative journey. This need for certification stems from its potential to facilitate cultural change, standardize practices, and enhance the external image of companies. Fourth, the qualitative data advocates include corporate social responsibility (CSR) within the certification framework. Integrating CSR practices is anticipated to fortify both the internal and external reputation of companies, aligning profitability with social responsibility and leadership (Ravina-Ripoll et al. 2019).

Lastly, the scope of the cultural change advocated extends beyond individual enterprises to encompass the entire business landscape, including SMEs. This approach positions companies as conduits for broader societal change. The CHM is poised to redefine corporate culture, transcending the conventional ethos by advocating for an inclusive, employee-focused, and socially responsible business environment that promises to revitalize the corporate world and society (Sánchez-Vázquez et al. 2019). These findings underscore the need for a standardized CHM framework to guide organizations, particularly SMEs, in implementing happiness-focused strategies. Certification ensures minimum standards, homogenizes best practices, and helps companies differentiate themselves in a competitive market. Participants note that such frameworks can assist SMEs in overcoming barriers related to resource limitations and experience gaps, thereby improving internal processes, enhancing external reputation, and boosting employer branding. Incorporating corporate social

responsibility (CSR) within CHM is also highlighted to align organizational goals with broader societal well-being.

To effectively measure and monitor the success of CHM, this proposal outlines a comprehensive framework of key performance indicators (KPIs). These indicators are tailored to the unique context of SMEs, ensuring that happiness initiatives can be implemented and assessed cost-effectively and scalable. The framework combines quantitative metrics (e.g., employee happiness and turnover rates) with qualitative insights (e.g., feedback and focus groups) to evaluate CHM's impact holistically.

Table 5 details each KPI, explaining its purpose, implementation process, and how it signals improvements in employee well-being, organizational performance, and overall business stability. This approach ensures that SMEs can adopt CHM strategically, align initiatives with employee needs, and measure tangible outcomes effectively.

Table 5 has our proposal for KPI that CHM framework should have to help SMEs in implementing Happiness strategies:

1. Employee Happiness Surveys: provide a direct, measurable way to assess well-being and track changes.
2. Retention and Turnover Rates: reflect workplace stability and employee satisfaction.
3. Performance Metrics: link CHM to tangible improvements in productivity.
4. Absenteeism and Presenteeism: address health-related issues, directly tied to employee happiness.
5. Workplace Engagement: focuses on employee enthusiasm and active participation.

6. Talent Acquisition: highlights CHM's role in improving employer branding.
7. Qualitative Feedback: complements quantitative measures, offering deeper contextual insights.
8. Financial Performance: demonstrates the long-term organizational benefits of CHM.

By tracking and analyzing these KPIs, SMEs can monitor CHM success effectively, ensure continuous improvement, and demonstrate measurable impacts on employees and business performance.

Discussion

In Spain, most companies that make up its industrial and commercial fabric cannot conduct in-depth research to determine their employees' happiness level at work. The happiness of workers is beginning to be a concern within companies (Mendoza-Casal et al. 2021), and it has been found that the happiness of workers versus non-workers is lower; a third of workers in Spain stated that their general health has worsened during the COVID-19 pandemic (Salas-Nicás et al. 2021). In fact, according to data from the CIS (2021) in its study on social, political, economic, scientific-technological, and mental health trends, mental health experts do not highlight happiness at work as one of the three main trends in occupational health between now and 2030. Notwithstanding, they warn of persistent problems in mental health derived from the pandemic era.

On the other hand, as shown in the interviews conducted and in the review of the scientific literature, the happiness of workers and consumers is closely linked to productivity, intrapreneurship, innovation, creativity, satisfaction, loyalty, and responsibility (Momparler et al. 2011). Likewise, it coincides with what was highlighted in the interviews: organizational respect for the employee and employee care positively influences employee well-being (Fisher 2003).

The philosophy of placing the employee at the center, employee-centric as a strength of the company, is in line with Bonsu (2020), who assured that an organization with an employee-centric philosophy, in which workers are happy and less stressed, manages to reduce turnover to insignificant levels, accomplishing the generation of competitive advantage in the company (Bonsu 2020). We know that these happy workers have a higher engagement and that talent retention and employee satisfaction are due to higher employee engagement (Momparler et al. 2011). Happiness management, therefore, helps talent retention, one of the main problems companies face (Ahumada-Tello and Ravina-Ripoll 2022).

Several studies recognize that human capital is key to achieving company growth and positioning. Therefore, companies must take actions that allow them to attract and retain the best human capital they can access and ensure optimal conditions (Jung 2021). Thus, organizational happiness appears as one of the most representative elements of this trend inclined to the concern of the levels and conditions of employees working in organizations (Mendoza-Ocasal et al. 2021).

It has been possible to verify the numerous positive effects for employees and organizations of managing workers' happiness. However, so far, only large companies have been able to access this type of management given the human, material, and economic resources that are needed, among others, to have a key figure, the Chief Happiness Officer (CHO), as highlighted by Ravina-Ripoll et al. (2021).

Any company wishing to obtain the benefits derived from organizational happiness should implement organizational and operational processes to carry it out. Consequently, the research consultants decided to ascertain how to help these SMEs achieve this goal, determining the characteristics that a Happiness Management Certificate in Spain should have with the intention of standardizing the process. This is due to the various difficulties encountered in its implementation. There is a particular emphasis on SMEs as a market opportunity for the consulting sector.

Once the scientific literature was reviewed, the CHM (Ravina-Ripoll et al. 2023) was chosen as the basis for starting the consulting process. However, it was previously assessed through interviews to obtain the evaluation of experts. It was concluded that the Certificate and its Phases are the correct basis for progress. However, due to companies lacking existing resources, there should be constant support and help from expert consultants. It is also highlighted that an evaluation of the company's Corporate Social Responsibility (CSR) policy should be included in the phases. This is in line with Guzzo et al. (2022), as the connection of CSR with human resource management can boost the perception of organizational support, influencing job performance. It may also increase workers' happiness and loyalty to the company, influence workers' well-being and work performance during a crisis, and offer a way to hire people who share similar organizational values.

Therefore, based on the literature review and in-depth interviews, it is advisable to modify and adapt the base model of Ravina-Ripoll et al. (2023), including new phases and factors to be considered in this process of Happiness Management through obtaining a certificate. See Fig. 3.

This model aligns with Jiménez-Marín et al. (2021) since it responds that Companies must undertake management models

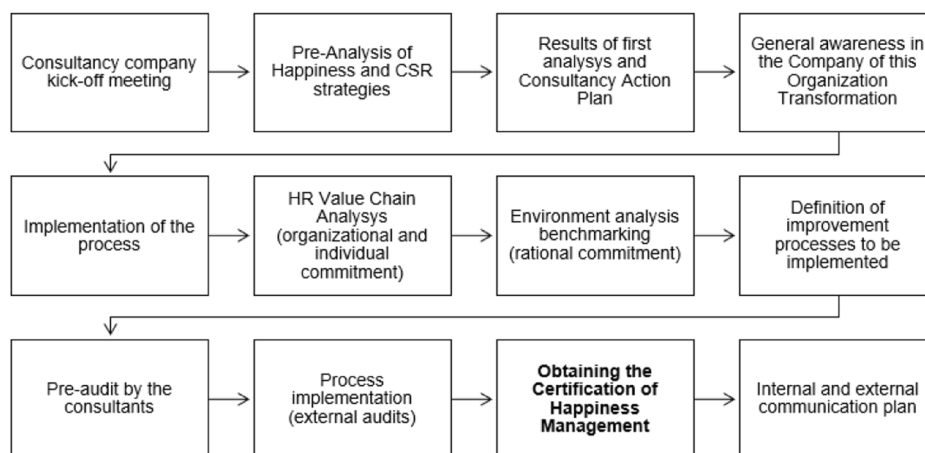


Fig. 3 CHM procurement process through an external consultant and CSR analysis.

where organizational, psychological, communicative, or social factors stimulate corporate happiness within organizations.

Given the lack of similar certifications in the current market that demonstrate the positive effects generated in the financial results of organizations by implementing models that pivot on the holistic pursuit of internal customer happiness (Ravina-Ripoll et al. 2023), this application in SMEs, through consulting and CHM processes, could make it advisable to develop this new line of consulting business. This would result in a competitive advantage as there are currently no companies offering it.

This happiness management can facilitate the creation of productive and purposeful workplaces. Corporate happiness is a complex and strategic concept in managing human resources and organizations (Ravina-Ripoll et al. 2017). This complexity justifies the search for expert consultants to help companies.

In summary, the benefits of a new philosophy of happiness management are made more accessible to SMEs through consulting. The aim is to achieve the CHM, thus attaining the associated benefits of having happy employees, such as better work performance, being more innovative and having higher intentions to stay (Bibi et al. 2021). For desirable outcomes, organizations must first know how to foster happiness at work (Bastos and Barsade 2020) and this is the objective of this Consulting work. We have clarified the needs and the process, and we can help companies obtain this Certificate.

To further strengthen the findings and address implementation gaps for SMEs, this study proposes a structured framework for measuring the success of Happiness Management Certification (CHM). By combining key performance indicators (KPIs) such as employee happiness surveys, turnover rates, absenteeism, and employee engagement metrics, SMEs can monitor the tangible impacts of CHM programs. These indicators provide SMEs with a practical, low-cost approach to evaluating employee well-being, workplace satisfaction, and organizational performance improvements. Through interviews and focus groups, qualitative feedback complements the quantitative measures, offering deeper insights into employee needs and program effectiveness. Integrating Corporate Social Responsibility (CSR) into the CHM framework further enhances external reputation and employer branding, ensuring alignment with organizational goals and societal values. This comprehensive measurement strategy addresses SMEs' specific challenges, enabling them to demonstrate CHM's benefits in employee productivity, talent retention, and market competitiveness.

• **Proposed Model for CHM Implementation Based on KPIs**

This model integrates a comprehensive approach to Happiness Management Certification (CHM) for SMEs, structured around measurable Key Performance Indicators (KPIs) as described in the Results section. The framework ensures practical implementation, continuous monitoring, and measurable success, addressing employee well-being and organizational performance.

1. **Core Pillars of the CHM Model**

- a. **Employee Well-Being:** Focuses on initiatives that improve employee happiness, mental health, and job satisfaction.
- b. **Organizational Performance:** Measures the tangible outcomes of happiness initiatives, such as productivity, retention, and financial stability.

- c. **Continuous Improvement:** Incorporates feedback mechanisms and monitoring tools to refine initiatives based on employee needs and organizational goals.

2. **CHM Implementation Framework**

- a. The following steps provide a roadmap for SMEs to implement CHM effectively:

Phase	Key Activities	KPIs Tracked
Phase 1: Assessment	- Conduct anonymous Employee Happiness Surveys to benchmark current well-being. - Analyze Retention and Turnover Rates to identify trends.	- Employee Happiness Surveys - Retention and Turnover Rates
Phase 2: Strategy Design	- Identify key initiatives based on survey feedback (e.g., mental health programs, flexible work schedules). - Develop policies to improve Absenteeism and Presenteeism.	- Absenteeism and Presenteeism Rates
Phase 3: Implementation	- Roll out well-being programs and performance-driven initiatives. - Link Employee Performance Metrics to happiness strategies. - Promote team engagement activities.	- Employee Performance Metrics - Workplace Engagement Scores
Phase 4: Monitoring	- Use regular surveys, performance reviews, and team participation data. - Track Talent Acquisition Metrics and analyze qualitative feedback from employees.	- Workplace Engagement - Talent Acquisition Metrics - Qualitative Feedback
Phase 5: Evaluation	- Assess the impact of CHM initiatives on Financial Performance and workforce stability. - Review KPIs to measure progress and identify areas for refinement.	- Financial Performance - Employee Happiness Trends - Turnover and Absenteeism Improvements

3. **Continuous Monitoring and Improvement**

- a. **Improved Employee Well-Being:** Higher happiness survey scores and lower absenteeism rates.
- b. **Enhanced Organizational Performance:** Increased productivity, reduced turnover, and improved financial metrics.
- c. **Positive Workplace Culture:** Higher workplace engagement and talent acquisition success rates.

This CHM model, grounded in measurable KPIs, provides SMEs with a structured, scalable, and data-driven approach to fostering employee well-being and improving organizational outcomes. By continuously monitoring performance and incorporating employee feedback, SMEs can ensure long-term

sustainability, enhanced competitiveness, and an engaged, satisfied workforce

Conclusions

After discussing the results obtained, the last phase of the research was developed, concluding that the working population is less happy than the non-working population and, after analyzing the in-depth interviews, that the development of this type of program is necessary. Companies confirm the need for their implementation and a certification as a standardization process to ensure the success of such an implementation. This research sheds light on the market by providing companies and organizations with a clear vision of the market situation. It also provides the consulting sector with a market opportunity derived from the trend in employee behavior and the need for companies to solve this gap.

Happiness management will play a key role in the future of companies as it offers a positive corporate image of companies committed to the working passion of their human capital and the satisfaction of their customers. This has to do with the philosophy that monetary benefits are not exclusive of the guiding principles of corporate social responsibility, respect for the environment, emotional consumption, and happiness management (Ravina-Ripoll et al. 2019), highlighting the importance of putting people at the center of company management. Through the process of obtaining this certificate, companies will be able to achieve this objective of the happiness of their workers by also offering to the outside world a seal that certifies their concern and management of joy.

On the other hand, this study confirms the current market trend of greater concern for companies' welfare of their workers and the negative effects that the COVID-19 pandemic has had on this group, affirming a behavior on the part of companies. In this increasingly demanding and highly changing business environment, companies face the challenge of adapting without compromising employee well-being, so the implementation of appropriate management practices not only facilitates organizational transitions but also plays a crucial role in promoting and protecting well-being and happiness at work (Lucia-Casademunt et al. 2018). In this sense, as Lucia-Casademunt et al. (2018) highlight, it is essential for companies to adopt strategic approaches to manage organizational change without negatively impacting employees' quality of life. On the contrary, enhancing their happiness.

According to the literature review, no similar certificates have been found that apply the philosophy of happiness management presented here. Likewise, this research supports the critical contribution of management consulting in generating valuable and innovative knowledge with and for organizations (Piazza and Abrahamson 2020), specifically in happiness and organizational well-being consulting. In Spain, SMEs account for 99% of companies, according to data from the National Institute of Statistics for 2021. It has been observed that those who implement this type of program are of a considerable size.

Through the research, it has been possible to determine the need to manage organizational happiness and enhance our employees' happiness through a standardized process for obtaining a new CHM. On the other hand, it is noted that it is essential for the company to have an employee-centric philosophy while incorporating CSR policies as they improve the company's image and employee engagement (Mompalmer et al. 2011; Guzzo et al. 2022). Also, by detecting the lack of existing resources in SMEs to obtain this certificate, it has been possible to confirm the need for a specialized consulting firm to help and accompany the company in obtaining this improved CHM.

However, this research is not free of limitations. Firstly, considering that this study was conducted during COVID-19, future studies should continue to test this model to verify the results after the pandemic. The sample could have been more extensive even though it was representative, and carrying out the studies at different points in time could have led to a better analysis, concluding the evolution of this trend. So, it would be advisable to continue observing this evolution.

For the present research, the database shared by the CIS on its website has been used. However, in the future, in addition to the use of this database, specific surveys could be employed to meet the objectives set by the researchers. As for the qualitative aspect, the interviews, despite their relevance, have been scarce, so in future studies, they should be expanded, also including a focus group, extending to more in-depth interviews with more companies from other sectors and of different sizes, also differentiating between small, medium, and large companies. It is necessary to analyze whether these aspects indirectly affect other departments of the company and to what degree to measure the impact of these actions not only on the organization itself but also to examine and determine which areas have been most affected.

Practical implications. The findings of this study underscore the practical significance of implementing happiness management strategies within Spanish SMEs. As these enterprises constitute a significant portion of the nation's economic fabric, adopting a Happiness Management Certification can yield several tangible benefits. Firstly, it provides a structured approach to fostering employee well-being, increasingly recognized as an essential element of productivity and innovation. By establishing standards for well-being initiatives, SMEs can enhance their attractiveness as employers and reduce turnover rates.

Moreover, such certification is a badge of commitment to CSR, bolstering company image and customer loyalty in an era where ethical business practices are scrutinized. Finally, given the disproportionate impact of the pandemic on the mental health of the workforce, prioritizing employee happiness through such certifications is not only a strategic investment in human capital but also a societal imperative. As the study suggests, external consultancy engagement in this certification process could offer SMEs the expertise and resources needed to navigate the complexities of implementing these programs, ensuring that the pursuit of workplace happiness translates into measurable gains for both employees and the broader business community.

In addition, the proposed framework for measuring CHM success offers SMEs actionable tools to monitor its impact. By integrating key performance indicators (KPIs) such as employee satisfaction surveys, turnover rates, absenteeism, and financial performance, SMEs can effectively assess the outcomes of happiness management initiatives. This enables continuous improvement, ensuring CHM strategies align with organizational goals and employee needs. Moreover, including CSR metrics within the CHM framework supports ethical business practices and strengthens employer branding, positioning SMEs as socially responsible and attractive workplaces.

Theoretical implications. From a theoretical perspective, this study contributes to the growing body of literature on happiness management and its impact on organizational performance, particularly in the SME context. It extends the understanding of employee-centric management models by integrating organizational well-being and Corporate Social Responsibility (CSR) into a unified framework. This highlights the importance of aligning internal happiness initiatives with external societal goals, offering a holistic approach to organizational development.

Furthermore, the study addresses the gap in research regarding the accessibility of happiness management strategies for SMEs, which often lack the resources and frameworks available to larger corporations. By proposing a CHM model tailored to SMEs, this research provides a foundation for future studies to explore the scalability and adaptability of happiness management across different organizational sizes and industries. The findings also emphasize the role of external consultancy as a bridge to overcoming resource constraints, offering a new perspective on implementing complex organizational strategies in resource-limited environments.

Future research. Future research emerging from this study should expand on longitudinal analysis to observe the enduring effects of Happiness Management Certification on SME performance and employee satisfaction over time. This would confirm if such certifications have long-term value and impact on organizational resilience, especially in post-pandemic recovery. Additionally, comparative studies across different sectors within Spanish SMEs could uncover sector-specific challenges and opportunities, tailoring approaches to happiness management.

Reviewing the differential impact on various demographic groups within the workforce could also provide insights into inclusivity and the equitable distribution of well-being initiatives. Furthermore, expanding the qualitative component to include a more extensive, more diverse set of participants and incorporating focus groups could enrich future research, offering a deeper understanding of the experiences among owners, employees, and managers. Also, exploring the interplay between happiness management and technological adoption in the workplace, such as artificial intelligence, could provide a modern perspective on work culture evolution in the digital era.

As we can see in the previous text, future research lines have arisen from this work. It would be advisable to analyze what quantitative and qualitative effects the process of obtaining the proposed CHM would have, as well as the Happiness Management that this entails in companies from different sectors, to compare and see in which sectors they have more effects. On the other hand, it would be interesting to analyze these effects based on differentiation by company size since we observe that large companies are clear about the matter, as they have resources, processes, and, above all, culture. Analyzing whether SMEs implement these actions and programs and their effects would be necessary. It also would be interesting to explore in the long term the effects of this type of certification and program, the results of the practice by the consultants, and, most importantly, the satisfaction of the companies that implement these actions. Finally, it would be exciting to see the consequences of implementing this new philosophy and obtaining the certificate on the market and its effects on consumer happiness.

Data availability

The datasets generated during and/or analyzed during the current study are available from the corresponding author upon reasonable request.

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Author contributions

Conceptualization: JMNS, JMG, EAT; Methodology: JMNS, PGR, JMG; Software: PGR, JMG; Validation: JMNS, EAT; Formal analysis: JMNS, PGR, JMG; Investigation: JMNS, EAT; Data Curation: JMNS, PGR, JMG; Writing - Original Draft: JMNS, JMG, EAT; Writing - Review & Editing: PGR, JMG; Supervision: JMNS, EAT; Project administration: JMNS, JMG.

Competing interests

The authors declare no competing interests.

Ethical approval

Ethics approval for the research was granted by the Human Research Ethics Committee (CEIH) of the University of Granada under protocol number 2694/CEIH/2022, on May 24, 2022. All procedures involving human participants complied with the ethical standards of the institutional and national research committees and conformed to the principles of the 1964 Helsinki Declaration.

Informed consent

Quantitative data: this research utilized secondary data published by the Centro de Investigaciones Sociológicas (CIS), a public research institution under the authority of the Ministry of the Presidency, Justice, and Relations with Parliament of the Spanish Government. We understand that the CIS complies with all applicable legal and ethical standards regarding data protection and participant confidentiality. Further information on their data protection policies is available on their official website.

Additional information

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