

THE LIVED  
EXPERIENCE

# ANNUAL DEFENCE CONSUMER SURVEY 2025



sodexo<sup>\*</sup>





*Mark Baker*

**Mark Baker**  
COO Defence  
Sodexo UK & Ireland

# FOREWORD

## Mark Baker

Throughout 2025, Sodexo conducted the fifth annual customer satisfaction survey across its portfolio of defence sites. This research represents one of the most comprehensive assessments of Service Personnel satisfaction conducted in the UK and Cyprus, and the data collected comprises a highly representative sample of military consumers by gender, age and rank.

We're delighted to have engaged a record number of participants this year, with 7,439 people taking part – a 27% increase compared with 2024. The results help us to assess satisfaction levels with Sodexo's services among Service Personnel, and track our performance year-on-year to provide insight into where we are performing well, and identify further areas for improvement of the Lived Experience.

Once again, this year's survey has revealed positive results, and overall satisfaction levels with Sodexo's services remain strong. Importantly, we are seeing continuous improvement over the last five years, with overall satisfaction levels rising from 68% in 2020 to 80% in 2025 and 90% positive sentiment in open feedback.

This summary report highlights key satisfaction statistics across several service areas and includes insights into some of the initiatives and improvements that have made an impact this year. I am delighted to share the results with you and hope you will find them useful.

Sodexo continues to enhance its services, using this research to inform our offers and product development. As the needs of Service Personnel continue to evolve, we know there is no room for complacency and are ambitious for the future. We're not just providing food and facilities; we're nurturing environments where personnel can thrive – shaping a Lived Experience that helps them to deliver improved operational capabilities.

My thanks go to our clients, supply chain partners and Sodexo teams – working as one to deliver the best for our Service Personnel.

### Mark Baker

COO Defence  
Sodexo UK & Ireland

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# RESEARCH FOUNDATION

The Annual Defence Survey is Sodexo's primary channel for measuring satisfaction levels across our defence portfolio. This year we engaged participants at more than 50 locations in the UK and Cyprus. The results give us valuable insight into the on-the-ground perceptions of Sodexo's services, so we can refine our offers and products, build on what we do well and plan for the future.

The survey provides us with valuable primary quantitative data that we use, combined with qualitative research via focus groups, forums and academic partnerships, to ensure every decision we make is grounded in robust evidence.



# OUR RESEARCH TIMELINE TO DATE

**2017**

Sodexo commissioned Ipsos MORI and King's College London to conduct a comprehensive study into the changing needs of Armed Forces personnel.

**2020**

Sodexo conducted the first Annual Defence Survey in its current form.

**2021**

Ipsos MORI and King's College London carried out a second study for Sodexo, refreshing the 2017 research.

**2023**

Sodexo continued the development of the Annual Defence Survey, increasing participation year on year

A programme of ongoing focus groups was launched to gather qualitative feedback from customers, supplementing our quantitative data.

**2024**

Senior Service Personnel, academics and sector partners attended our roundtable event to discuss critical challenges.

**2025**

Sodexo conducted the fifth Annual Defence Survey in its current form, engaging with the highest sample base in the survey's history.





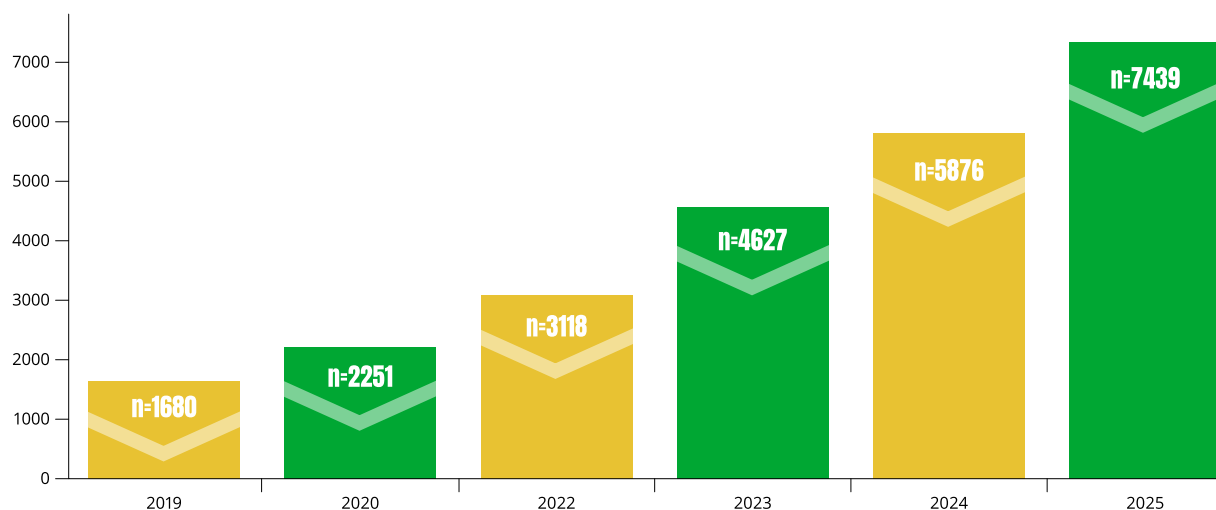
UK MOD © Crown copyright 2026

# METHODOLOGY

The Sodexo Annual Defence Survey of Service Personnel was conducted via a self-completed questionnaire using an online URL (Computer Assisted Personal Interview) with additional paper-based survey questionnaires for areas with poor mobile connectivity. All research was conducted in accordance with the international quality standard ISO 20252: 2012 (MRQSA Market Research Quality Standards Authority) and according to the Market Research Society's ethical Code of Conduct.

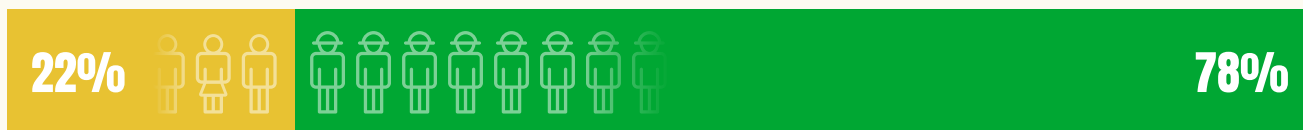
## Survey response

In 2025 the Annual Defence Survey achieved an unprecedented sample base of **n=7439**, increasing by **27%** since 2024.



## Civilian

## Military

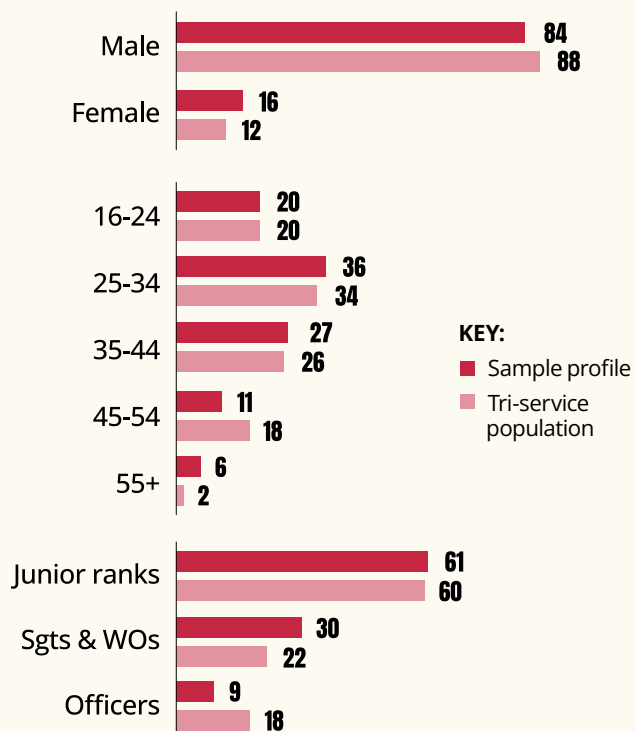
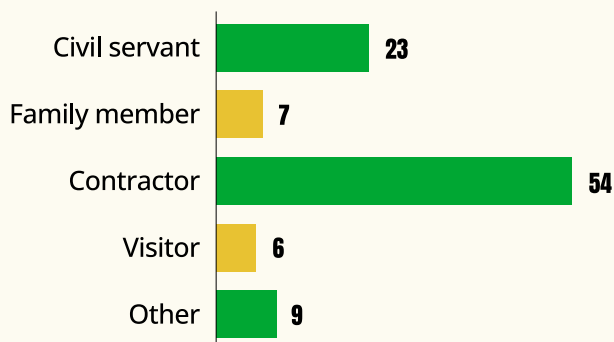


**Total civilian sample**  
n=1640  
(see breakdown opposite)

**Total military sample**  
(excluding refusals/non-answers) - n=5764  
(see breakdown below)

## Analysis of the sample

The resultant sample base derived from the survey is composed primarily of military consumers (78% of total sample), with the remainder (22%) being civilian consumers. The military personnel sample is broadly representative by gender age and rank.



Source: MoD – UK Armed Forces Biannual Diversity Statistics (April 2025)

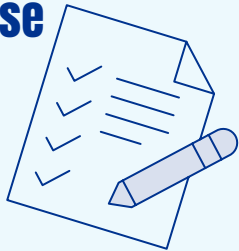


# EXECUTIVE SUMMARY

2025's key findings

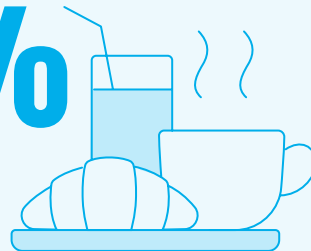
## Record response:

7,439 participants, a 27% increase on 2024.



Cafés and coffee shops remain the strongest performers with an 83% satisfaction rating.

83%



76%

Satisfaction with convenience stores also remains strong, currently at 76% and trending upward.



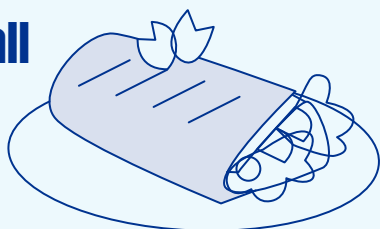
90%

of the respondents expressed positive sentiment in our open text feedback.



# 76%

of customers are 'very satisfied' or 'satisfied' with our overall catering offer.



## Overall experience



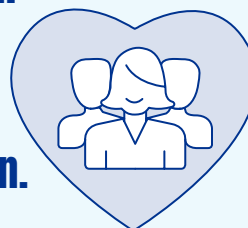
24-hour vending (38%), better Wi-Fi (27%) and larger store footprint (23%) emerged as key drivers for improving overall experience.

Digital enablement is becoming increasingly important: at sites where our Everyday app is deployed, overall satisfaction levels are at

# 85%



The human connection remains paramount: the majority of Service Personnel who express that they are satisfied with our overall service cite Sodexo staff as a key reason.



In 2025, overall satisfaction reached impressive levels, with 80% of personnel expressing contentment with the services provided.



## SECTION 1: The catering experience

Analysis of survey responses suggests that Service Personnel view catering as core to the ideal Lived Experience. Nutritional value, cooking methods, preparation and premium produce are all considered essential elements of a quality meal. This reinforces the findings of previous research, with an increasing emphasis on eating healthily and in a relaxed, social environment.

While other external research focuses on specific cohorts or snapshot perspectives, Sodexo's approach captures the full spectrum of ages and ranks, enabling us to identify satisfaction drivers that apply across demographics whilst also understanding the particular needs of different groups.

**69%** of customers were very or fairly satisfied with the availability of healthy options at mealtimes, and **72%** were happy with the nutritional information available.



When examining the data, we identified three areas where expectations of our catering offer are evolving: nutritional value, choice and innovation.

## NUTRITIONAL VALUE

The results showed that 69% of customers were very or fairly satisfied with the availability of healthy options at mealtimes, and 72% were happy with the nutritional information available.

Yet the survey uncovered clear pointers for nutritional development. When asked what improvements would encourage more frequent visits to our dining rooms, customers said:

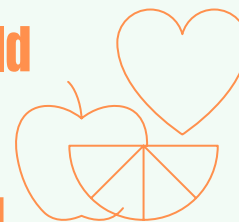
# 35%

An increase in higher protein options, would encourage 35% more diners to use our catering facilities



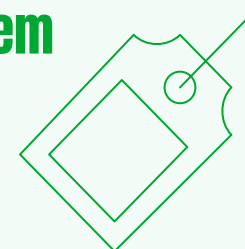
# 23%

of respondents feel that more healthy food options would improve their general wellbeing



# 27%

of respondents said that better nutritional labelling would attract them



## SECTION 1: The catering experience (cont.)

Sodexo is continuously honing its dining offer to respond to these nutritional needs and preferences.

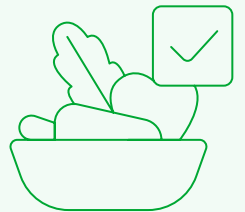
In November 2025, as part of the UK's Defence Menu Refresh, we introduced 100 new high-protein main course dishes into our menus.



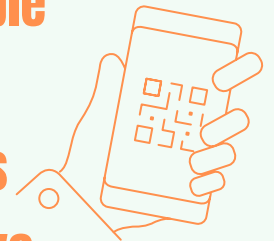
To answer the call for more healthy options, nine multigrain salads have also been added.



Many personnel, particularly those in senior ranks, are leaning towards a flexitarian diet, and we're increasing the number vegetarian and plant-based meals to reflect this trend.



Improvements made to nutritional labelling in 2025 have improved transparency and raised awareness, with detailed insights available via the Everyday app and digital screens. Investment in enhanced digital formats is ongoing, to ensure we continue to improve the visibility of nutritional information.



Nutrition continues to be a core driver in the catering experience, and we sharpened our focus in this area with the appointment of a dedicated Nutrition and Wellbeing Manager in December 2025.

Our registered dietician will shape our overall nutrition strategy going forward. She will lead on menu development, creating effective messaging, championing nutritional innovation and promoting health and wellbeing guidance, including taking ownership of the Mindful Active programme across our Defence estate.



**“ The desire for healthier and higher protein options forms part of our ongoing catering development and continuous improvement of the overall Lived Experience on bases. We will continue to act on the findings of the Annual Defence Survey and ongoing feedback to refresh menus, products and labelling to meet modern, health and performance-focused expectations.**

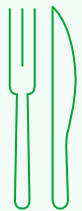
**Kate Hilton**, Health and Wellbeing Manager

# SECTION 1: The catering experience (cont.)

## CHOICE

This year's results show continued high footfall in Sodexo's catering outlets, with **92%** of participants using at least one of our services – messes, diners, coffee shops or convenience stores – at least once a week.

While all elements of Sodexo's catering services scored highly, there are evolving expectations around the variety of options. Choice remains a key driver, alongside a desire for convenient and customisable options.



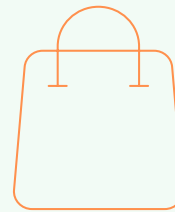
**66%**

of diners in our messes and diners are satisfied with the variety of meal options.



**70%**

of shoppers are satisfied with the product range in our convenience stores.



**83%**

Coffee shops are the strongest performers for overall satisfaction (83%), with 78% happy with product range.



Consumers have welcomed improvements we have made in 2025 – reflected in these scores – and we are continuing to explore new ranges and forge partnerships with suppliers to drive even higher satisfaction levels.

**In May, we refreshed our core menus to:**

**Introduce a new concept called Station Rotation, promoting a diverse range of street food concepts for lunchtimes.**



**Incorporate a new partnership with EatCurious, a plant-based food development company creating versatile products that are minimally processed, have a good nutritional profile and are full of flavour.**

**Expand our range of Gurkha curries**



At locations where new concepts have been introduced, feedback has been positive. Our Station Rotation street food menu achieved an **81%** 'very good or good' rating from consumers who had ordered from the menu.

Our product range in convenience stores has been expanding to offer not only a wider choice, but healthier options. With the increase in demand for 'functional foods' – providing health benefits beyond basic nutrition – 100 new product lines were introduced. Brands such as HUEL, WoW Hydrate and Better You have been added to the drinks range, along with high protein ELEAT cereals and N!CKs bars and wafers to offer healthier alternatives to traditional options.



# SECTION 1: The catering experience (cont.)

## INNOVATION

From expanding our digital footprint to introducing waste reduction initiatives, our commitment to innovation is improving customer experience and cost performance.

The Everyday app is currently deployed in 31 defence catering outlets and is now available for 4,575 users. The app offers a host of features, allowing users to log on for diet recommendations, to browse popular items, and make more informed nutritional choices using the Military Performance Choice icons which code meals as red, amber, or green – directly addressing the request for clearer nutritional information identified in both this survey and our Lived Experience Forum discussions.

Innovation doesn't just embrace digital initiatives – we're introducing new technologies that have an impact on energy performance, service delivery and food quality with an expansion plan to deliver it across more Defence sites.

The introduction of an eco-friendly solution for cleaning reusable coffee cups has already drawn positive feedback from customers. Now in action in the Portsmouth Naval Dockyard and Colchester contracts, the InstaRinse machine eliminates the need for hand-washing cups, cleaning them hygienically in just 25 seconds. It uses just 3% of the water compared to hand washing a single cup, leading to reduced water bills and environmental impact.

Behind the scenes, there's a transformation in the cooking process in our kitchens, with the introduction of new UNOX kitchen equipment that improves speed and efficiency and allows us to move from bulk cooking to providing fresh, individually cooked meals. Using AI technology, the equipment improves cooking processes, ensures consistency and reduces energy consumption. The food is often healthier too, as the ovens cook with minimal oil.

# 85%

**Where the Everyday app is deployed, satisfaction is high, with 85% of users reported to be 'very satisfied' or 'satisfied' with the overall experience.**



## SECTION 2: The overall Lived Experience

The steady improvement in overall satisfaction from 68% in 2020 to 80% in 2025 reflects sustained investment in the 'four fundamental pillars' identified in our white paper: good accommodation, good food, good training and personal space.

Enhancing the overall Lived Experience is a continuous process and this year's survey gauged opinion on several key elements.

### SUPPORTING FAMILIES

The findings in our *The Future Lived Experience and the UK's Armed Forces in the 2030s* white paper revealed that enhancing family and community connections was a key priority.

**Responses from this year's survey show that 43% of personnel with families feels Sodexo caters well for family needs.**

Clearly these results demonstrate there is room for improvement, particularly in locations where families live on base. When asked what would improve services for families, family-friendly facilities (24%), food variety/range (23%) and better value (20%) emerged as the top responses.

We are already taking action, and this year our Cyprus locations were the centre of a transformation in leisure facilities to provide modern, inclusive and enjoyable family-friendly spaces. Spaces at RAF Akrotiri, Episkopi and Dhekelia have been renovated and reopened under the new name Chelona. The facilities boast interactive iPad zones, a 'Very Important Kids' (VIK) menu tailored to younger guests and welcoming Costa Coffee outlets. The Chelona facility at Akrotiri also includes a dedicated children's soft play area, bringing a unique hub for family engagement and recreation.

### INVESTING IN OUR PEOPLE

Our people bring our business to life, and this year's survey shows that the human connection remains paramount.

**When asked for the principal reason for their overall satisfaction with Sodexo's services, 50% of personnel cited staff as the key reason.**

We believe in investing in our people so they can continue to bring passion, knowledge and pride to every daily interaction. Our deliberate strategy of employing veterans, reservists and military family members who understand the unique demands of service life also fuels deeper connections.

Throughout 2025, our behavioural change programme 'The Lived Experience: It's All About You', has been re-energising our teams and connecting them to our purpose. Launched in 2024, momentum has been building and the training has led to a transformation in culture. Where the program is delivered, employee turnover is down by 22% and absenteeism has reduced by 50%. The programme has earned industry accolades, winning the Best Learning Initiative at the 2025 Business Culture Awards.



**It's All About You recognises the vital role our people play and gives them the tools, time and inspiration to thrive. Because when people feel valued, they deliver service that goes beyond expectations."**

**Samantha Hockey**, Head of HR, Sodexo Defence





# BUILDING ON OUR WHITE PAPER RESEARCH

The findings in this survey corroborate the themes identified in our white paper and Lived Experience forum. The data shows that where we've acted on research recommendations – such as implementing digital meal services, expanding nutritional information and enhancing staff training – satisfaction has risen measurably across the portfolio.

**However, challenges remain in areas highlighted at our Lived Experience forum.**



### Technology and connectivity:

Access to reliable, affordable Wi-Fi remains inconsistent across sites. Our research has highlighted this as a priority for addressing digital inequality affecting Service Personnel.



### Work-life balance:

Flexible dining hours and opening times for coffee shops and convenience stores remain drivers for satisfaction across locations.



### Support for families:

Improved childcare provision and support for families were identified as critical to recruitment and retention – particularly among younger personnel who expect employer support for family life.



### Consistency of standards:

While overall satisfaction is high, there can be variation between sites. Sodexo is addressing this through a refreshed approach to our standard operating procedures across all defence sites.



## LOOKING AHEAD

The Annual Defence Survey remains one of our most valuable channels for gathering primary insight into what customers believe we're doing well and how we can evolve our services moving forward.

Thanks to the insights provided by the record number of participants this year, we are building our research foundations so we may truly understand how we can continue to improve to the Lived Experience for our Armed Forces.

Our research goes on. We will continue to invest in new platforms to measure service quality and have plans to upgrade our 'always-on' customer feedback mechanisms to ensure we remain responsive to evolving needs.

As we look towards the 2030s, we will continue to work in tandem with our clients and customers to ensure we keep pace with the changing demands of military life on base, and provide services that make a genuine difference to the daily Lived Experience of those who serve.



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