



Sodexo Work Experience Tracker:
Navigating and
Future Proofing
the Evolving
Workplace



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Setting The Scene

There is no doubt that work looks and feels very different, post-pandemic. Trends such as 'quiet quitting' along with the cost of living crisis and inflation, mental health, and new technologies are reshaping our idea of the future workplace.

Post-pandemic, more people work remotely, either fully or in a hybrid pattern, than ever before.

We conducted research, in collaboration with YouGov, across six countries, with 3,000 respondents based in the UK.

In this report, we present findings from the UK, providing a major signpost for employers looking to build resilience in their workforces.

Our Research

Our research is based on online interviews with adults across six countries. The data was collected by YouGov online using the quota method in February 2023 and covered:

- A global survey
- UK working adults across industries, from the private sector, based in an office, factory, R&D centre, call centre, warehouse or full-time remote working on a site \geq 100 employees.
- Questions on wellness, inflation, return to the workplace, role of food, use of office space.

We have combined this dedicated primary research, Sodexo's in-house expertise and supporting secondary sources to build a clear picture of the current state of play when it comes to workspaces in the UK, what they offer, and what employees want from them.

As it is about more than just space and fundamentally about people, we have delved into employee likes and needs regarding benefits, workplace perks, working patterns and work-life balance.

We also consider the importance of the planet in this equation – without which, people and the spaces in which they operate would no longer exist.

Vital Spaces – People, Space, Sustainability

In this transformed world, organisations will prosper by creating physically and virtually connected experiences that enable people to thrive in a blended work-life dynamic. The workplace now exists within and beyond its traditional four walls and must be more flexible, dynamic and scalable.

Now is the time to think strategically about these workspaces and be prepared to support your people no matter what tomorrow brings.

Vital Spaces is a systematic approach that empowers you to transform your workplace and plan for shifting futures.

People

People are at the heart of Sodexo. Our people-centred approach is woven into all of our Vital Spaces solutions – from workplace design to work-life services and everything in between.

Space

There is a need for new, strategic thinking around the future workplace, involving design and technology that supports engagement, collaboration and productivity. Your teams need to be empowered to do their best work regardless of where it gets done.

Sustainability

Working to environmental, social and governance (ESG) principles is about creating positive change for individuals, communities and the environment through practices like local, responsible sourcing, reducing food waste and services that reduce carbon emissions. Action on sustainability is vital to engage and motivate employees and grow your business through long-term brand reputation.



Executive Summary

Your 'Quick Read' Snapshot Of The Key Findings

We know you are busy, so this section provides an at-a-glance overview of the key findings and themes covered in the report. You can read on to delve deeper into the details or [get in touch](#) to find out more.

We've focused on the core principles of People, Space and Sustainability

The Road Ahead? The Synergy between People, Space and Sustainability



Snapshots Of Findings

People

28%

Are disengaged and say they want to quit.

43%

can be seen as 'quietly dissatisfied' and are a group that employers need to prioritise engaging.

One in five employees cite poor mental and physical health.

We identified issues of serious mental and physical health concerns among Gen Z respondents.

There is a relationship between satisfaction with food at work and both mental and physical health.
Food can nourish our well-being

Key Takeaways

- + Employers need to know the issues affecting their staff and take steps to address some of the fundamental causes of staff dissatisfaction. This is as important for the 'partially satisfied' group as it is for the unsatisfied, quiet quitter group.
- + Many employees already have access to wellness perks, but employers could consider the wider contexts of ill health, such as pay, financial resilience and employee experience.
- + Improving job perks could help employee loyalty and help workers manage the cost of living crisis. These perks include commuting benefits and improved food options at work or when working remotely. Of the 35% who say they want to do more remote working, 92% cite inflation as the reason.

Snapshots Of Findings

Space

58%

work in a hybrid pattern.

Employees like remote working, because it saves them time and money, enables better work-life balance, and gives them space to focus. And they appear to want more of it.

Socialising, free or subsidised food, comfort of working environment and subsidised commute are top 4 motivations to bring people back to the office.

Connection Crisis?

Data indicates that more than two days of remote work are having an impact on engagement with colleagues and work experience.

We know all our clients want to know how they could get people back to the office.

Key Takeaways

- + Remote working has proven to be sticky, post-pandemic, and workers would like more of it. Are employers offering enough flexibility here?
- + The current emphasis is based on the idea that coming into the office offers greater opportunities for collaboration and creativity. But given the popularity of remote working, employers need to consider how to foster these in a remote context too.
- + When we think about a human need for connection and belonging, what should the workplace of the future look and feel like? It's not just about workplace design, though that is important. Employers need to think about how genuine connection is about collaborative opportunities – providing a meeting space – and social relationships and belonging.
- + And social relationships impact creativity and well-being. Those impromptu, 'lightbulb' moments of inspiration. More opportunities for informal socialising that works for employees in terms of their time and other commitments, may help foster greater connection.
- + Collaboration and socialising are the key motivators for coming into the office - a mix of long-term remote and hybrid working has created a connection crisis.

Snapshots of findings

Sustainability

90%

Sustainability is important to employees. 90% of employees are waiting for their employers to act on sustainability.

78%

In our research, 78% think environmental sustainability is personally very or fairly important to them.

The Top 3 sustainability considerations employees want employers to act on are:

+ Energy + Plastics + Waste

This factor is particularly true of Gen Z and Millennials, but concerns may be rising across all generations.

66% of respondents in the East of the UK ranked responsible energy usage by their employer as being very important, but only 22% of them said that environmental sustainability was very important to them. This confusing picture might relate to energy as an 'inflation' rather than a sustainability issue.

Sustainability matters, but pay and perks are a primary motivator, particularly in the context of a UK cost of living crisis. It is interesting to note a disconnect here between the importance of sustainability to employees and the realities of living in a world of 'permacrisis'.

Key takeaways

- + The environment matters to employees, and increasingly so. Companies need to make sure they have a plan to perform well on ESG.
- + Being responsible about energy usage may be moving the dial on environmental awareness through the gateway issue of energy inflation. In some areas, employers may face new expectations in the sustainable management of resources or greater support for energy costs. This is also closely linked to the cost of living crisis in the UK and is at the forefront of people's minds.
- + There may also be an element of employees placing the onus on employers to manage workplace sustainability sufficiently – or even, in the case of urban business centres, like London, expectations that it should go without saying.

Digging Into The Detail

+ 1. Where Are We Now? How Did We Get Here?

Work looks and feels very different post-pandemic, even if many trends we see now were already in motion.

Changing work patterns (freelancing, flexible working and homeworking working days), new workspaces (co-working) and technological advances (video conferencing) have already changed the conversation on the workplace of the future.

But the pandemic created a 'new normal' around where and how people would work. Hybrid working has rapidly grown, and the stigma of remote working has decreased.

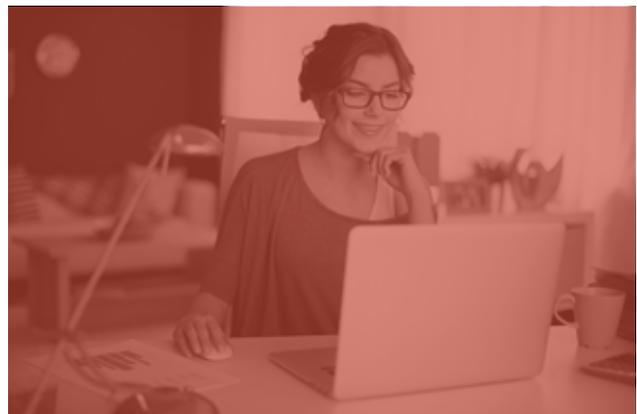
Mental and physical health has become a more open discussion. Research by Mind found that a third of adults and young people said their mental health had got much worse since March 2020.¹

These critical new trends have, in turn, allowed increased flexibility and accessibility for parents and people with disabilities as well as reshaping the lives of the UK workforce.

In the UK and the US, buzzwords such as 'Great Resignation' and 'Quiet Quitting' have become popular descriptions of post-pandemic attitudes towards work. Do we have a way of understanding what is happening to those withdrawing from work satisfaction?

The broader context of political and economic crises plays a part in employee expectations. Inflation, transport, housing and energy costs, food security, the climate crisis, and new technologies such as AI, to name a few, influences how we think about work and what we want from it.

Change is an ongoing part of how we live. We can't predict what the future will hold. But our insights in this report will help us understand what makes employees healthy and happy, what the future workplace might look like, and why climate-proofing your business can help attract and retain staff.



Digging Into The Detail

+ 2. People: Are Employers Giving Employees What They Want?

Key Trends



There is a significant minority of active and 'quiet' quitters who are disengaged and underperforming.



The largest number of our respondents are only 'somewhat satisfied' with their workplace experience, with a small minority being totally satisfied.



One in five employees cite poor mental and physical health.



43% of employees can be considered 'quietly dissatisfied' and engaging them should be a priority.



There is a relation between quiet and active quitters and poor mental & physical health.

Work Satisfaction and Quitting

Surprisingly, given the sense of crisis in the UK economy, our research found reasonable levels of job satisfaction.

2/3 are either totally (21%) or somewhat (43%) satisfied with their workplace experience



71%

of these two groups are satisfied with **team spirit**



68%

are satisfied with **work-life balance**



65%

are satisfied with **opportunities to grow**



Globally, **56%** say they want to stay with their current employer.

However, there is also a large minority who appear dissatisfied.

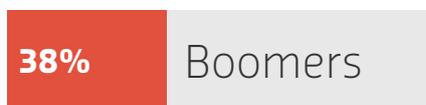
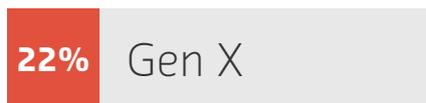


say they will stay in work and do the bare minimum



are in various stages of quitting.

Out of those who want to do the bare minimum are:



These percentages demonstrate some truth to the 'quiet quitting' and 'great resignation' hype, with 43% 'quitting' in some shape or form and a significant percentage of 'quietly dissatisfied' (43%) who may not be performing at their best.

“Interestingly, there is a significant percentage that are 'quietly dissatisfied'. We know about quiet quitters, but why are this group being overlooked? What piece of the puzzle are we missing?”

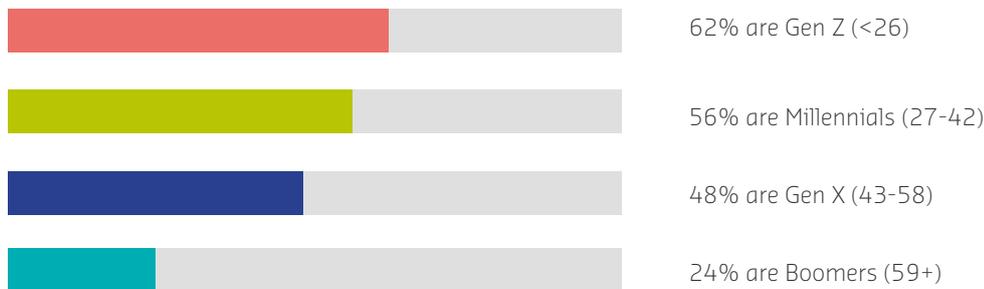
- Julie Ennis, CEO of Sodexo Corporate Services UK & Ireland

Who Are The Quiet Quitters?

Looking at the top-ranking category in our research among quiet quitters, they are:



Of those who want to stay with their employers and work hard,



Of those who want to stay with their employers but only do the bare minimum,



Our analysis shows that, accounting for sampling, age is the most statistically significant predictor of quiet quitting in the UK.

The 'Quietly Dissatisfied'?

It isn't just about quiet quitters. There is an ambivalence issue arising that could pose further business risks in a time of 'permacrisis'.

By far the largest group in our survey responded 'somewhat agree' when asked about:



“ This snapshot of research shows that only a very small minority of employees are totally satisfied with their work. Many employees are unhappy with how they are treated at work as well as pay and benefits. Employers continue neglecting this group, which is why quiet quitting is no longer a mystery. ”

– Inna Lim, Director of Strategy, Marketing and Execution, Sodexo

Key Takeaways

- + Is there a large group of employees who are only partially satisfied?
- + What are the risks of this group becoming quiet or active quitters?
- + Can they be nudged into the 'totally satisfied' group? And how? Certainly, steps should be taken to dissuade these employees from moving into the quiet quitting category.
- + The value of a more engaged workforce, that feels included and respected, is clear when it comes to attracting and retaining productive employees.

Value Drag And Business Risk

Research on employee experience as a driver of value by WTW revealed that only a third of US firms are in a **'value drive'** state, where employees are engaged, included, and respected and are therefore more likely to stay.

WTW says **18%** are in a value risk state, where employees are considering leaving. 15% are in a 'value potential' state, where employees are disengaged and contribute less value, but are staying.

A sizable third are in a **'value drag'** situation, where employees are disengaged and looking to leave.

“The implications of this research are profound. Employee experience shapes business value and is a predictor of business performance.” Only organisations in a value drive state will grow, while organisations in a value drag state will decline and deliver low to no returns.”

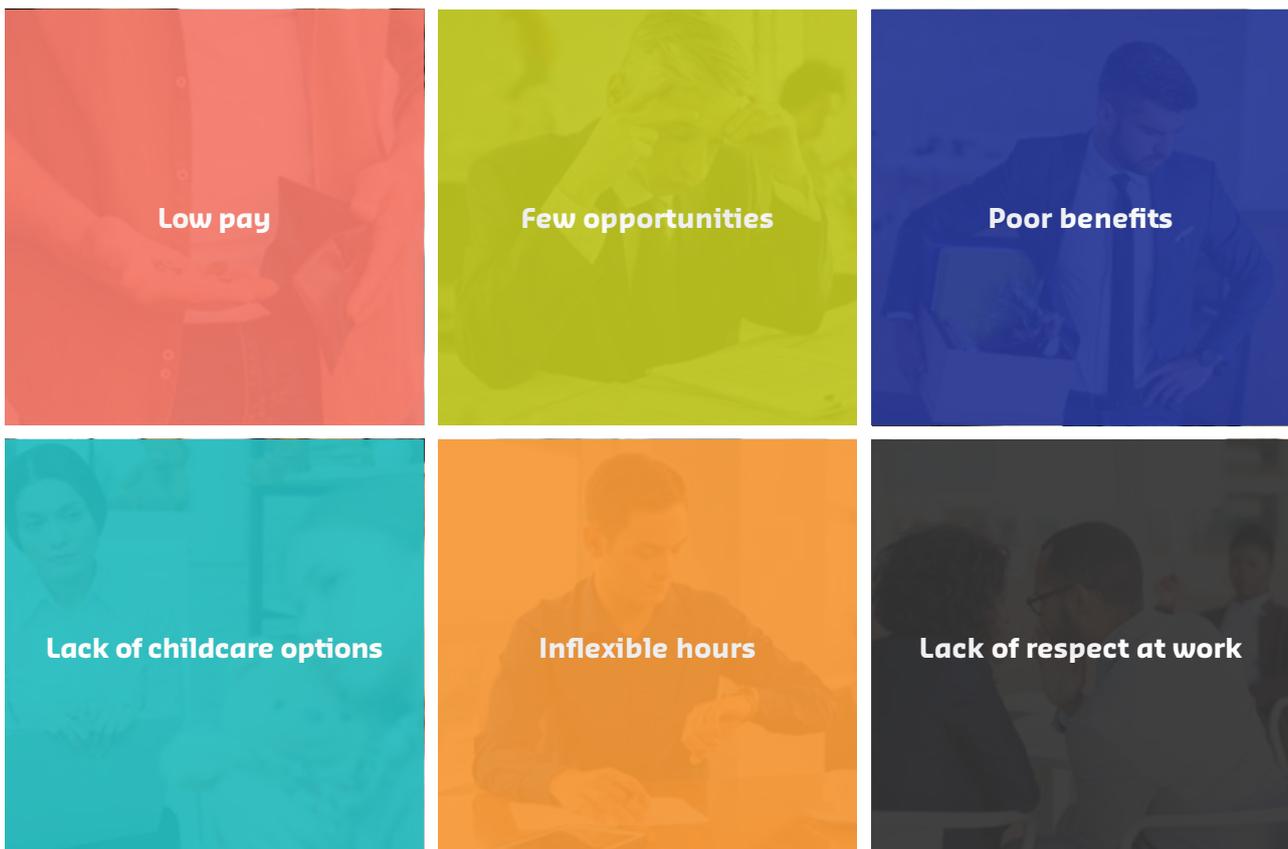
- Jill Havely, Managing Director of Employee Experience, WTW.⁹



What's Behind Quiet Quitting?

It's possible that quiet quitters can inform us about how to improve working life for the majority.

Quiet quitters are unhappy with their conditions of work. Pew Research Centre found that the reasons for quiet quitting in the US included:



The top three major reasons to quit were pay, opportunities and disrespect.³

Is 'Quiet Quitting' A Diversity, Equity And Inclusion Issue?

There may be a diversity, equity and inclusion (DEI) aspect to quitting, too.

Drilling down into gender, for example, a study by Deloitte found that women were less likely to trust their employer than men, despite equal levels of trust and the start of employment.

Women feel that they get less favourable treatment on pay, promotion and inclusion in work-critical activities like business trips, particularly when they have children.

Universal flexible working benefits increased trust, but only as long as women were not penalised for taking advantage of them.⁵





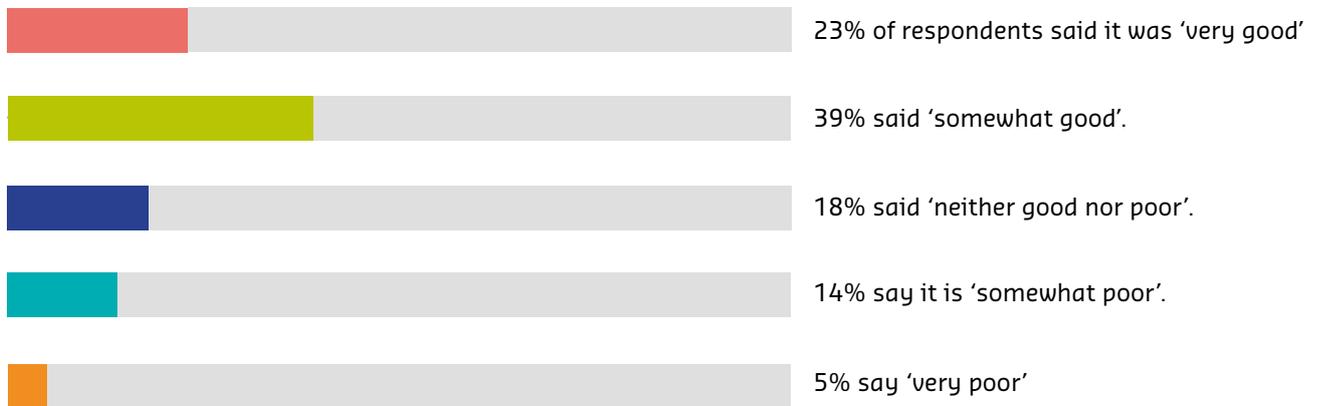
Mental And Physical Health

The majority of employees we surveyed said their mental and physical health was good (very good or somewhat good).

However, a sizable minority (one in five) **describe their mental and physical health as being poor.**

Drivers of poor mental and physical health include stress, work-life balance, not enough time to exercise and insomnia. These are contributing factors to quiet quitting and other employee engagement and retention issues – employers have the opportunity to address these through practical approaches to support employees with both mental and physical health.

When asked about their mental health:



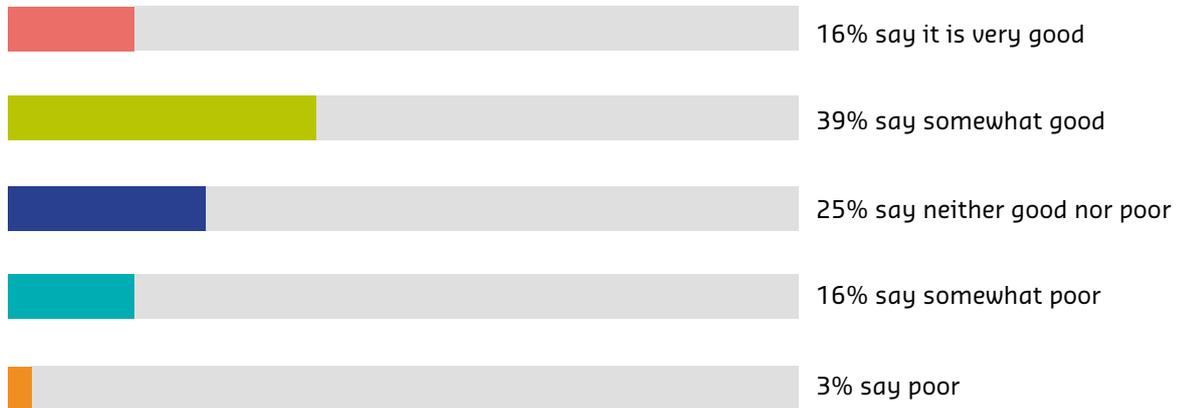
Of those who say their mental health is poor, the top three causes are:



However, 31% say their poor mental health is unrelated to work.



Mental And Physical Health



Of those who say their physical health is poor:



38% say their poor physical health is not related to work.

“It’s interesting to see the similarities between mental and physical health as we do with levels of job satisfaction. A small minority have ‘very good’ mental and physical health but worryingly one in five describe their mental and physical health as being poor to some degree.”

- Alex Kristall, Managing Director, The Good Eating Company (Sodexo).

Key Considerations

- + To what degree does this large middle group pose a challenge for maintaining good mental and physical health?
- + Can workplace-based well-being strategies help improve their responses?

Generational Mental And Physical Health

“In our study, we found significantly more active quitters with poor mental and physical health, particularly in the age 45+ group. This is supported by ONS data in the UK that looks at ‘great resignation’ trends among the over 50s.”

- Clara Zhou, Senior Marketing Manager, Sodexo

The ONS found that long-term ill health has driven economic inactivity trends in the UK among this group. Flexible working, good pay and remote working were the most critical factors that would entice them back into work.⁶



Gen X and Boomers are more likely to report their mental health as being very good (28% and 33%, respectively).



Gen Z are more likely to say their mental health is somewhat or very poor (28%).

This finding could be attributed to more awareness of mental health among younger generations – and the higher demand this generation places on mental well-being.⁷

However, we can see the same trends with physical health. Millennials and Gen X report highest in the ‘very good’ health and Gen Z the lowest.

“Levels of poor mental and physical health among Gen Z – the employees of the future – are concerning. More research is needed on the well-being of Gen Z employees and how to support them.”

- Julie Ennis, CEO, Sodexo Corporate Services UK & Ireland



Employee/Employer Disconnect

Our research suggests a high degree of disconnect between employer and employee perceptions of mental and physical health support. While employees have access to wellness facilities, there are broader reasons for dissatisfaction and disengagement.

In our study, when it comes to access to wellness perks:



58% currently have access to mental health support of some kind



39% have wellness benefits (e.g. access to the gym)



33% can access wellness learning sessions with experts

However, when it comes to broader support, only:



33% have access to financial wellness advice



12% have some support for caring duties



6% have access to childcare

The biggest category (56%) say they have none of these benefits.

When it comes to workplace or commuting perks



17% have subsidised food



17% have a web app to help access the workplace services



12% have free food



5% have a carpooling service



3% get fuel vouchers.

60% say they get none of these benefits.



A study of 1000 HR Directors and 4000 employees in the UK, US and Singapore by Aetna revealed that while 70% of employers thought that they had good access to health and wellness benefits and support, only 23% of employees agreed.

And this perception gap has an impact on recruitment. 75% of employees said they would not join a company that didn't provide good support for ailments like back pain.⁸

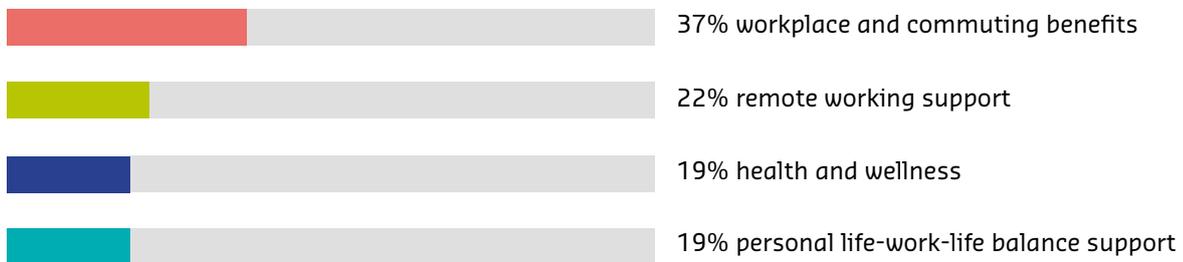
Key Considerations

- + Do workers have access to help for their personal lives? Our results show not significantly.
- + Employers must, above all, know their workforce and what they want or need.



Workplace Perks And Business Performance

In our research, we found that the top-ranking perks employees would like their employers to propose are:



A survey by WTW on employee benefits and well-being found a highly significant correlation (85%) between employees scoring high on well-being indicators and having a benefits package that met their needs.

In particular, benefits packages that precisely met employee needs had the most positive effect, highlighting the importance of listening to employees.⁹

“...we think the challenge is that almost all the focus is on remediating symptoms rather than getting at the root cause of employee burnout. Instead, employers should step back and reflect on the structural challenges of the environment, which may be causing the burnout in the first place”

- Erica Coe, McKinsey partner and co-leader of the McKinsey Health Institute.¹⁰



Money, Money, Money

Money, whether in the form of pay or perks, is important to employees.

In the UK, the cost of living crisis is an election-defining issue, and one that is critical for business. For example, research by the Joseph Rowntree Foundation found that 'low earners attach greater value to those benefits that mitigate their highest living costs, such as food and leisure, travel, childcare, housing and utilities'.¹¹

Having great pay and perks is more than just a question of social justice. It also impacts business performance.

Great Place to Work® analysed data spanning 15 years from 2006 to 2021 from companies centring on the impact of the great recession of 2007–2009. They found that companies that delivered consistently great workplace experiences had the smallest losses. They were also the fastest to bounce back after the recession.¹²

And some of the largest employers are acting. A survey by PwC of large companies' responses to the cost of living crisis found that:

83% of reward specialists at large companies are taking action, or considering ways to help employees

Half are implementing or considering additional pay increases

40% are providing one-off bonuses

15% are making non-financial interventions, such as help with travel, home insulation and shopping.¹³

Key Considerations

- + To what degree is this support being offered in smaller companies?
- + Is there an opportunity to increase employee satisfaction - and therefore performance and retention - by offering improved pay and perks?
- + Work-life balance and cost concerns are to some degree driving remote working preferences.
- + Employees do not have significant access to workplace perks but would like them - this is an opportunity to align employer offerings with employee needs and wants



Wellness And Food Perks

Our research suggests perks of the job contribute to employee satisfaction, but a perception gap regarding the food benefits available to employees and where they source their workplace meals.

Take the example of food.

In our study, although 40% of respondents said they had workplace food facilities (covering canteens, cafés, pantries and other dedicated food for the workplace) it seems that those who do have food-related perks are not aware of what is available to them — another part of the connection crisis and showing a need for better communication to tempt workers back to the office. For most:



bring their meal from home



use a nearby food outlet



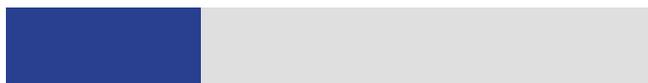
buy from a convenience store



39% are very or somewhat satisfied with the meal solutions provided by employer



19% somewhat or very unsatisfied



For 30% of employees, their employer does not provide meal solutions.



Only 29% on night shifts are satisfied. 39% of those working onsite are satisfied. Employers need to pay attention to food benefits for the night shift.

A majority of employees are not being provided work-life services and do not want to benefit from them in general.

Free food, health/wellness and remote work benefits and services are the valued by corporate services employees and are drivers of greater workplace experience. To note however, a majority of employees are not being provided with work-life services and do not want to benefit from them in general.

Free food is the most wanted benefit overall (particularly in France and the UK) and it is one of the benefits that has greatest impact on workplace experience (and work-life balance as well)

"Food matters to employees, and it is underrated by employers as a means to improve satisfaction levels and performance."

– Adrian Evans, Food Transformation Director, Sodexo

One of Sodexo's finest food brands, [Fooditude](#), offers free-issue food (instead of subsidised food). It also offers sustainable and creative food that brings your team together without the hassle of a kitchen in the office. Fooditude operates differently from traditional contract caterers – they don't run kitchens on client sites. Instead, they deliver a full food experience from a central production kitchen. The flexible approach to workplace catering means they can always offer something delicious to suit clients' needs.



Free food, health/wellness and remote work benefits and services are the most wanted by employees and are drivers of greater workplace experience.

When it comes to satisfaction, a 2020 research study on the relationship between food and job satisfaction found that the provision of food in the workplace signalled organisational support and predicated higher work satisfaction and lower turnover.¹⁴

As for performance, a survey of 500 office professionals by Sharebite found that



97% of employees say taking a lunch break improves their workday



64% say that a meal at work gives them energy to continue their day¹⁵

Food For Health

"SHAPE analysis of physical health data shows a consistent pattern of employees struggling with poor nutrition. There's a clear role and opportunity for employers in supporting their employees."

– Ali Khan, Founder and CEO, SHAPE

Our research found a correlation between satisfaction with food at work and good mental and physical health.

"There is a benefit to improving access to good food options at work or when working remotely, which could increase employee satisfaction, retention and performance."

– Kim Leahy, HR Director, Sodexo



Food: The Vital Fuel To Nurture Connection In The Modern Workplace

Through continued research, we have found that food is a key enabler for nurturing employee experience and building connections.

Office food often serves as a social glue that connects people. It inspires dialogue, encourages collaboration, and nurtures a unique sense of community. In the era of hybrid working, food has transcended its traditional role, becoming a pivotal tool to enhance employee health and well-being. It's also a key enabler in attracting and retaining talent.

Sodexo's Modern Recipe reflects this evolution, offering high street food experiences within a space that fosters connections. It champions all-day food offerings that align with modern living, acknowledging our bodily needs and respecting our planet's wellbeing. Wellness and responsibility are at its heart, emphasizing ethically sourced ingredients, sustainable practices, and balanced nutritious meals.

More than just a culinary offering, Modern Recipe cultivates a culture of connection, encouraging employees to pause, share, engage and ideate over meals. This service is an integral component of a positive employee experience, supporting well-being and fostering productivity and connection. By embracing the power of food, Sodexo's Modern Recipe significantly contributes to nurturing talent and creating a more harmonious, fulfilled workforce.

Key Considerations

- + Improving job perks could help employee loyalty and help workers manage the cost of living crisis.
- + Satisfaction with meal solutions provided by employers is limited among UK workers. Nearly 20% are dissatisfied with the meal solutions at the workplace which leads them to making their own arrangements. Interestingly, only 42% say they use onsite food services, such as a cafeteria, but 72% have access to them, demonstrating a disconnect between food benefits offered and employee take-up.
- + Bad food habits during remote work are noted in our research and other studies as having a negative impact on physical and mental health — employers that facilitate healthy food options across their employees should see increased benefits.

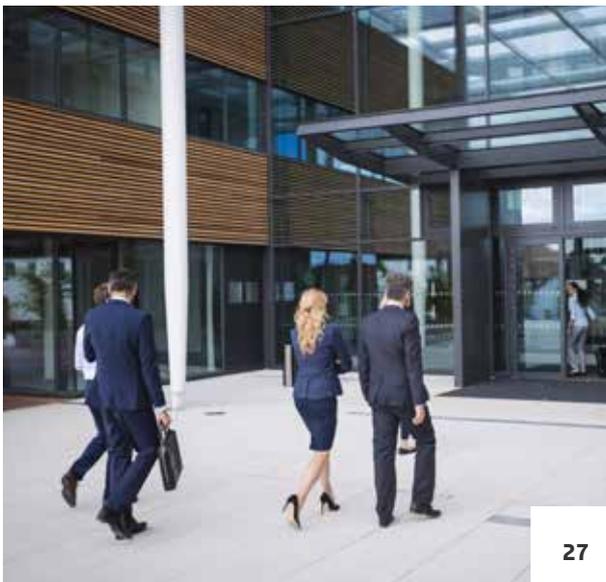


Workplaces are about people. Providing people with what they want improves satisfaction rates with business-critical impacts on recruitment, retention and performance.

Employers are likely to encounter significant problems regarding employee mental and physical health.

Providing wellness perks is important, but the broader context of workplace motivations and satisfaction – pay and perks – also affect health.

Employers need to consider more comprehensive benefits that can make, and keep, employees happy. In the long run, those benefits save money.



Digging Into The Detail

+ 3. Space: How Do You Make Your Workplace Work Smarter For Your Business?

Key Trends



58% work in a hybrid pattern.



Employees like remote working, because it saves them time and money, enables better work-life balance, and gives them space to focus. And they appear to want more of it.



Socialising, free or subsidised food, comfort of working environment and subsidised commute are top 4 motivations to bring people back to the office.



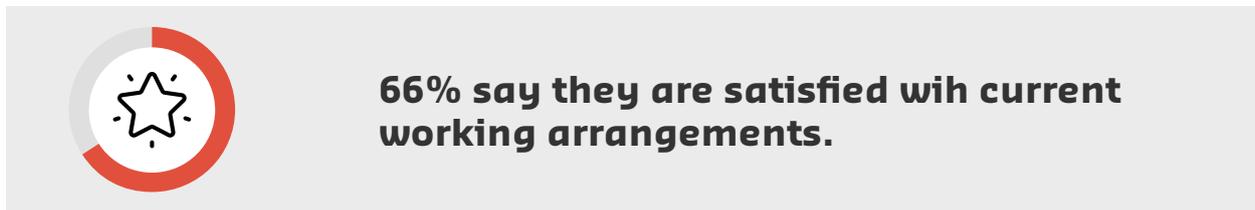
Connection Crisis? Data indicates that more than two days of remote work are having an impact on engagement with colleagues and work experience. We know all our clients want to know how they could get people back to the office.

Remote And Hybrid Working

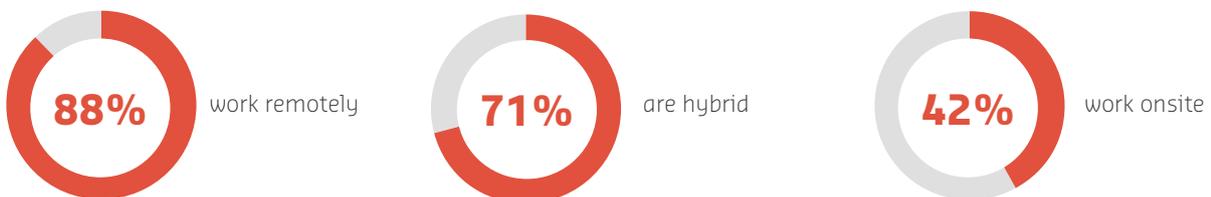
We know that employees generally favour more remote or hybrid working, and these findings are consistent with our research.



Overall, employees like remote working and appear to want more of it:



Of that 66%...



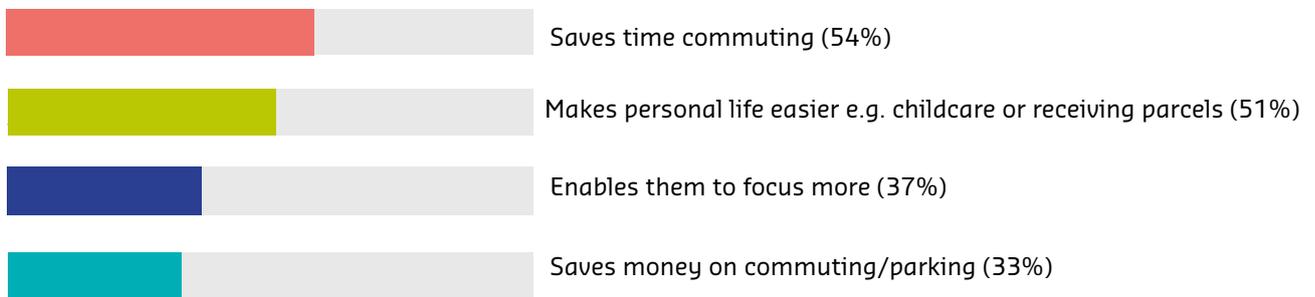


Why Do Employees Like Remote Working?

Employees like remote work because it saves time and money and enables better work/life balance. Two of the most important elements cited by our respondents when it comes to workplace expectations.

For some, it allows them to focus more – it is important that the space provided enables this, both to maximise the benefit of the working environment and productivity.

Remote working:



For those workers who want to change their working environment (more remote work or more office), the reasons are:



Key Considerations

- + Flexibility Is Flexible!
- + Do employees have enough flexibility to decide what works?
- + Are employers aware of how much employees value more flexible options?



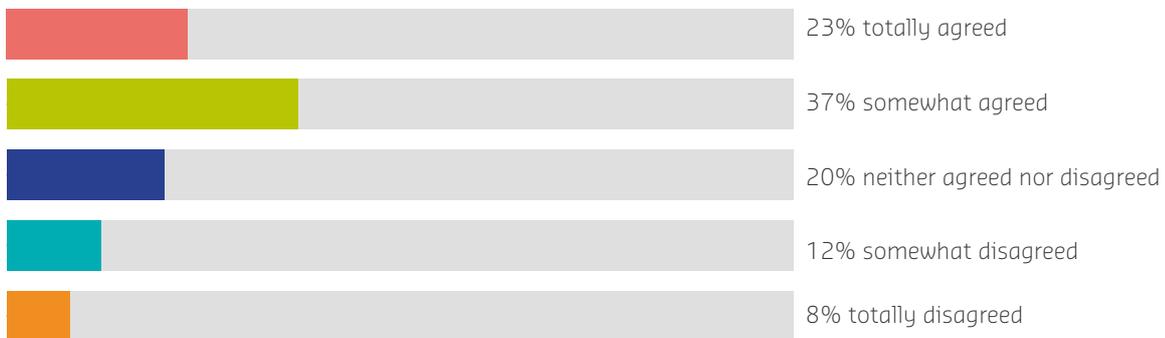
A Connection Crisis?

There is a downside to increasing the amount of remote work that employees do, and that is the issue of connection and genuine collaboration.

Are we losing touch with our fellow humans because of remote working?

What consequences does this have for workplaces and business?

When we asked respondents to agree or disagree with the statement 'I have a sense of belonging to my workplace community':



Connecting The Dots Between Human Connection And Wellbeing

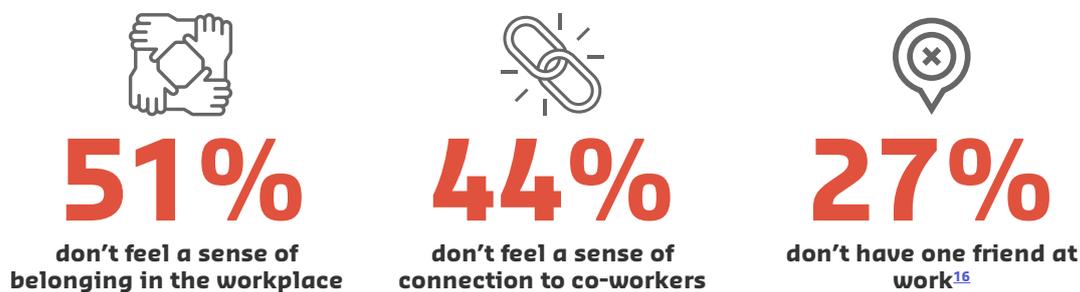
There is a downside to increasing the amount of remote work that employees do, and that is the issue of connection and genuine collaboration.

BetterUp says there is a 'connection' crisis among the workforce, creating poor mental health and workplace performance outcomes.

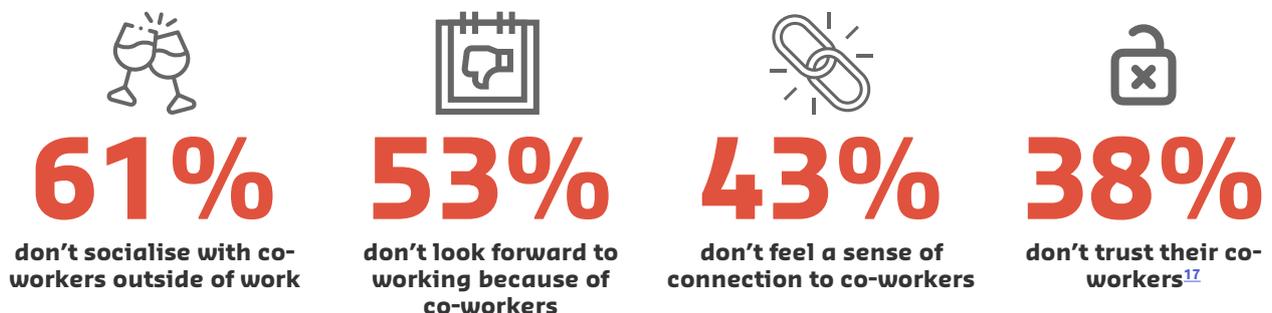
Their study of 1000 European employees found that a more connected workplace means that employees are better able to generate useful solutions to challenges and are more likely to take calculated risks.

Those who invest in workplace relationships have more positive relationships and greater life satisfaction.

However, they report that:



Another study by BetterUp on the connection crisis in the US found that of those polled:



How might employers help foster a sense of connection at work? We will return to this question in Space.



Why Do Employees Like Going To The Office?

BetterUp's research found that connection is different from interaction. Increasing opportunities for face-to-face or online collaboration is not the same as feeling connected to other people:

"Many businesses are now encouraging office attendance more proactively and are considering how to attract employees back to the office.

A shift toward quality over quantity has led to a desire for attractive, sustainable, well-kitted-out space, close to transport hubs and amenities."

- Margaret Doyle, Chief Insights Officer for Financial Services and Real Estate, Deloitte¹⁹

Key Considerations

- + Can we entice employees back to the office?
- + What would encourage people to come into the office more and invest in workplace relationships?
- + Would it help improve satisfaction and well-being?

Among our respondents, the top three reasons that people come into the office now are for:



When we asked what would bring them into the office more, the top four reasons why they would come in more frequently are:



However, 24% say nothing would persuade them to go into the office more frequently.

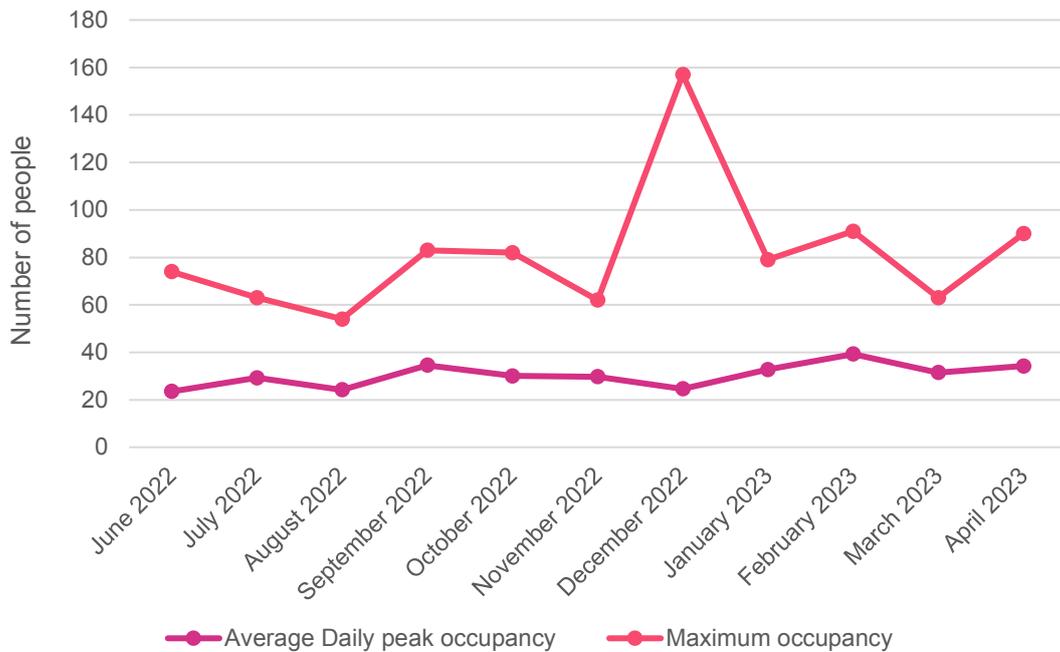


The consistent theme is that coming into work is about other people and provides a strong motivation to come in.

“We were all amazed at how much we could do working fully remotely. However, it has started showing some withering of the ties that bind in the culture [and] the social connectivity.” McKinsey.¹⁸

Our own data backs this theory. Sensor data from London offices shows a significant spike in December, a time when people want to connect for celebrations and more informal get-togethers around the holiday period. Traditionally, this might be a time when office spaces were expected to be quieter.

Sensor data from the UK 2022





Transform our workplace to facilitate collaboration AND enhance socialising

What we heard employees say...

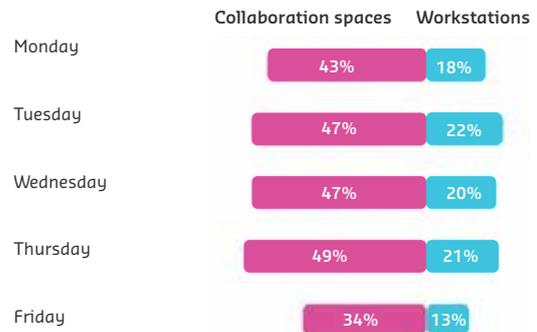
Top 4 reasons why employees would come in more:

Seeing other co-workers 	Free or subsidised commuting 
Free or subsidised food service 	Comfort of work environment 

Team spirit and collaboration is what employees derive greatest satisfaction from in their workplace experience:



What we observed through data...



Collaboration spaces are favoured over workstations, and used as social hubs.

“In the heart of the pandemic, we set out to redefine our London Headquarters, OSR. We knew the office had to transform when people started coming back. Early surveys hinted at a new trend - the office as a social hub, a place for health and wellbeing, and a crucible for culture. We wanted flexibility and adaptability to be its backbone. So we designed with these concepts in mind.

Now, our sensor data speaks volumes about how people behave. Looking at our data, it's clear that when given the choice, employees gravitate towards collaborative areas, while traditional workspaces often remain less populated. And these spaces buzz not just during work hours, but also after, as social hotspots. We've designed our office to transition easily into event and casual food spaces, facilitating the need for socializing and fostering a strong sense of community. The future is flexible, and we're ready for it.”

- Julie Ennis, CEO of Sodexo Corporate Services UK & Ireland



"A 2D screen can never give you what 3D life does... socially getting a feel for someone and connecting."

– Elliot Moss, Partner and Chief Brand Officer, Mishcon de Reya

The current emphasis is on formal collaborative opportunities.

36%

said they would come in more frequently to see other people in some form.



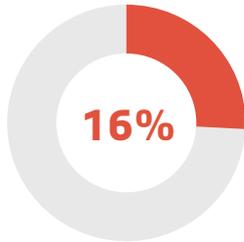
Key Takeaways

- + When we think about a human need for connection and belonging, what should the workplace of the future look and feel like?
- + How can employers help grow a sense of belonging?
- + Connecting is not the same as collaborating

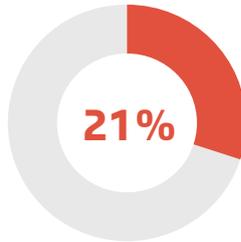
What Other Benefits Does The Workplace Offer?

Cost concerns are a motivation to come in more frequently, should an employer choose to capitalise on this and incentivise by offering perks (except for a quarter of respondents who won't come in for any reason).

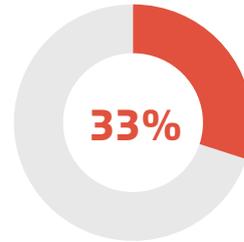
And that's not the only practical, personal element to this. We found:



come in for IT services/equipment.



want to access food and drink and services like an onsite gym



want a change of scenery or to avoid distractions at home.

This points again to the question about the right kind of workspaces for the needs and wants of employees, not just fashionable trends and aesthetics or narratives that want to 'keep things as they are'.

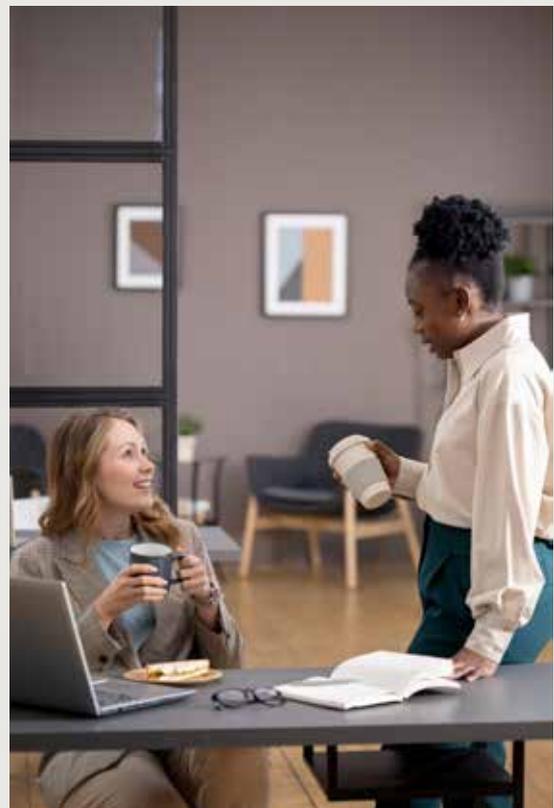
What about the creativity and well-being that come from everyday connections and interactions? Those impromptu, 'lightbulb' moments of inspiration?

Coming into the office has important benefits for connection. However, it doesn't mean coming into the workspace full-time. BetterUp's research found that:

"...in-office employees report lower levels of social connection and sense of belonging compared to their hybrid peers who spend at least 20% of their time working from home. They also expressed a stronger intention to quit."

They found that employees who put effort into building relationships had a greater sense of belonging, which, in turn, built qualities such as resilience, engagement and purpose. Those who are working hybrid appear to be making more of an effort to connect, collaborate and socialise when they do come in to the office, further emphasising the importance of connection to employees in all settings and the need for this to be facilitated by employers within the workspace.

Being around other people, and building relationships with them, has significant impacts on well-being.





Does The Office Work For Everyone?

Part of the reason remote working is so popular is because of caring responsibilities and/or disabilities.

A study by the Economic Innovation Unit found that employment for people with disabilities is now higher than pre-pandemic, a product of both a strong labour market and remote work possibilities.

Parents of young children or those with caring responsibilities also appreciate remote or hybrid working, given the social or governmental support limitations for these groups.

Employers need to think carefully about **how to facilitate connection** for these groups, both in managing remote working and inclusion within office environments.

Scope estimate that households with at least one person with disabilities need an **additional £975** to have the same standard of living as non-disabled households.

Perks of the job may have particular meaning to employees with disabilities, should employers want to encourage greater levels of office working.

What Might The Future Workplace Look And Feel Like?

Applying what we know about what employees want, the workplace of the future may consist of (in approximate order of importance):

- Perks to get you to the office, such as subsidised transport.
- Creating opportunities for socialising during the working day, such as collective lunch breaks.
- Different kinds of working environments to help socialising and collaboration, such as cafes, terraces and lounges.
- Green thinking - sustainable furniture and kitchenware.
- Healthy food options, provided by the employer.
- Adaptable or modular spaces to facilitate collaboration and ideation, such as workshops and labs.
- Flexible and mobile technology, and multimedia possibilities.
- Flexible workspaces, along with private, insulated spaces for deep thinking and working, meetings, and to help access for some groups.
- Green spaces – plants and green walls – to help well-being.
- Smart air and temperature regulation and circulation, to improve well-being as well as save energy costs.



It's Not All About Novel, Of-The-Moment, Design

Research by INSEAD on how working environments influence creativity found that unconventional workplaces - whiteboard walls, bright cushions, and the shabby chic look - actually inspired less creativity than conventional environments, depending on the task.

Why? Because when the task was related to their workspace, people came up with ideas that were overly influenced by their environment rather than genuinely novel solutions (for example, the unconventional workplace had lots of images and writing on the wall). Divergent thinking only occurred when the task could not be inspired by the features of the workplace.

The researchers say:

A particular workspace design could be the source of creative inspiration for one idea generation task but a source of cognitive fixation for another. Therefore, managers should not blindly copy the workspace designs of other organizations, just because such organizations are generating innovative outcome."

Importantly, this pattern was also replicated in live online sessions (with the unconventional workplace being a screen backdrop), suggesting that remote working may not be detrimental to creative thinking.

Practical solutions? Listen To Employees

A solution may be a less top-down approach to office design through design co-creation - where employees are partners in the design process - and testing.



It comes back to people and listening to what they want.



Is Working From Home The Ideal Way To Work Remotely?

When asked where people work when working remotely,

94% say from home.

In our report on [Vital Spaces](#), one in three of those willing to work remotely would prefer to do so from a 'third space'. Men, Gen Z and Millennials are overrepresented in those who want to work from a third space.

- Access to co-working provides even greater cross-societal collaboration by encouraging diverse mixing and connections.
- Should businesses be campaigning for or funding more local co-working opportunities?

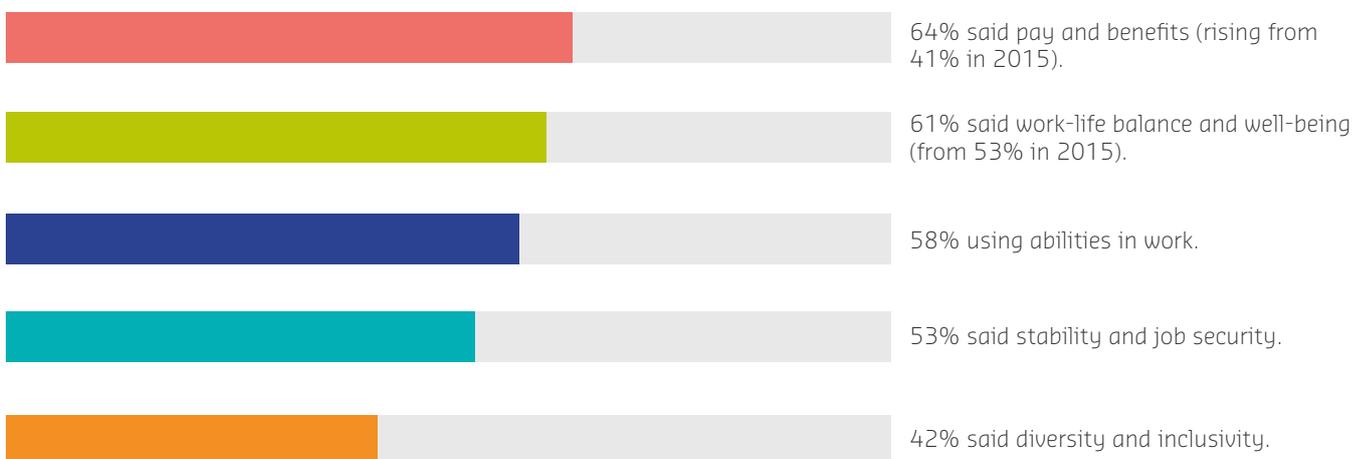
How 'Sticky' Is Remote Working?

Remote or hybrid working is important and popular. However, our research found that **pay/salary is still the primary and dominant driver of employer choice (67%)**, followed by work/life balance (46%).

Flexibility in where employees work came in at 27%.

Gallop polled 13,085 US employees on what factors were most important when accepting a new job.

They found that:



So how 'sticky' is the idea of remote working when pay and perks still (and increasingly) matter?

Vital Spaces - How People Connect With Space

Where employees work is important to them. Remote or hybrid working is popular, allowing employees to save time and money, space to work, and providing good work-life balance.

However, connection is also important, not just for formal collaboration but for socialising. Both provide those all-important opportunities for cross-fertilisation, a sense of belonging, and well-being.

The office doesn't work for everyone; indeed, people with caring responsibilities and disabilities benefit from remote working opportunities.

- Creating the optimal working environment is about pay, perks and people, not just office design.
- Can allowing employees to co-create their ideal workplace experience help improve satisfaction and well-being?

Workplace Design And Strategy

As a global leader in workplace services, Sodexo can work with you to create the environments and experiences that work best for you and your people. Our vast range of services, summed up in our Vital Spaces framework, means companies can save on time, effort, and cost without the need to recruit specialised services.

Sodexo owns an independently run workplace consultancy called WX. WX is a global workplace services leader that uses employee experience assessments to produce workplace strategies that analyse how spaces can be optimised.

Sodexo also partners with the space design company TSK to focus on corporate office design and provides strategic thinking, as well as construction and delivery services. Their specialists help coordinate every aspect of your project from beginning to end, delivering dynamic workplaces that enhance the employee experience.



Digging Into The Detail

+ 4. Sustainability: Why Do We Need To Do More?

Key Trends



Sustainability is important to employees. 90% of employees are waiting for their employers to act on sustainability.



In our research, 78% think environmental sustainability is personally very or fairly important to them. The Top 3 sustainability considerations employees want employers to act on are: Energy, Plastics and Waste



This factor is particularly true of Gen Z and Millennials, but concerns may be rising across all generations.



66% of respondents in the East of the UK ranked responsible energy usage by their employer as being very important, but only 22% of them said that environmental sustainability was very important to them. This confusing picture might relate to energy as an 'inflation' rather than a sustainability issue.



Sustainability matters, but pay and perks are a primary motivator, particularly in the context of a UK cost of living crisis. It is interesting to note a disconnect here between the importance of sustainability to employees and the realities of living in a world of 'permacrisis'.



Sustainability Matters

Climate change, resource management and biodiversity – the sustainability agenda – are becoming increasingly important to the population.

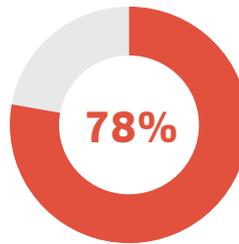
And there are expectations for employers to act.

The top three expectations respondents had of their employer when it comes to sustainability were:

- Responsible energy usage (52%),
- Responsible waste management (50%)
- Reduction of plastic (48%).

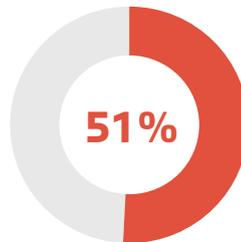
These are seen as the more tangible aspects of sustainability, more immediately obvious to employees, when in fact many of the major - and often unseen - sustainability challenges for employers lie within supply chains.

Sustainability matters to employees, influencing recruitment, retention, commitment, and the sense of meaning and purpose in work.



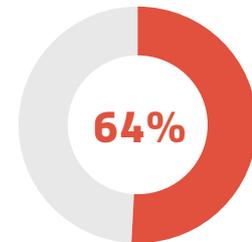
think environmental sustainability is personally very or fairly important to them

In recruitment and employment choices, a study of **7000 professionals globally** by recruiter Robert Walters found that **34%** of UK workers would turn down a job offer if a company's sustainability values were not aligned to their own.



said it was important that a company's sustainability values were aligned.²⁸

Research by Cone also found that



of Millennials surveyed consider sustainability commitments when deciding where to work.²⁹

KPMG surveyed 5700 adults in the UK and found:



46% want employers to demonstrate a commitment to ESG.



20% have turned down a job offer because a company's valueeey on sustainability did not align with their own (one in three of 18-24-year-olds.)



One in three researched a company's environmental credentials before applying for a job (45% of 18-24-year-olds.)³⁰



Sustainability influences a sense of loyalty and fulfilment.

Cone’s research also found that:



would be more loyal to a company if it helped them contribute to social and environmental issues (the US average was 70%).

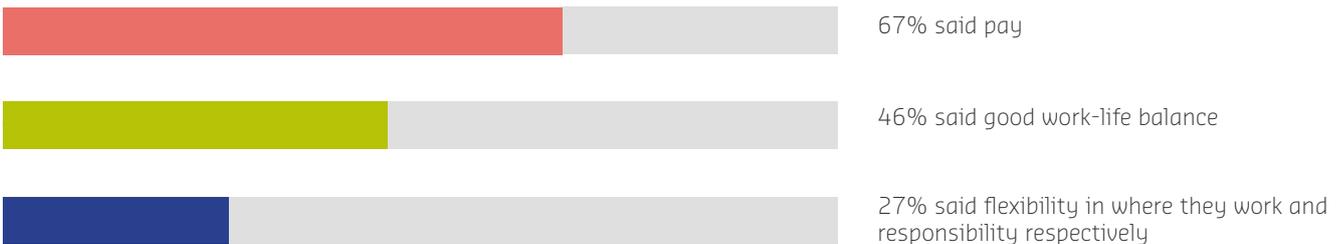


find work more fulfilling when they are given opportunities to make an ESG impact.

Importantly, employees say they will work harder for a company that operates ethically and sustainably.

2021 and 2022 iResearch Services research found that more than half of the employees surveyed said that they would work harder for a business that they believe is operating sustainably, at 58% and 52% respectively, and 89% of employees said that sustainability is an important factor when choosing a new employer.³¹

In our research, however, when asked to rank five issues in order of importance, which affect their decision to choose a new employer or stay with their existing employer:



Only 3% said their employer’s commitment to sustainability.

In the UK, even if sustainability is of growing importance to people, issues like pay, work-life balance and work experience rank higher than sustainability commitments.

It is possible that the cost of living crisis in the UK will have the impact of forcing people to make hard choices at the expense of the environment. However, this does not mean that employers should not take action on sustainability, given this is what most employees want to see happen.



A Commitment To Sustainability May Also Affect Work Satisfaction And Performance.

A French study in 2019 found that workers in firms that commit to sustainability standards have more positive attitudes towards their work, are more likely to be more actively involved in their work and work additional unpaid hours.

Environmental standards have transformative potential for attitudes towards work and productivity, even in a country, like France, known for its passion for good work-life balance.

Mind the Gap: What Are The Generational Differences?

In our research, while in all age groups, there was a majority who said environmental sustainability was very or fairly important to them, the percentages were higher among Gen Z (85%) than Boomers (71%).

Research generally supports the idea that there is a generational gap around sustainability and climate awareness.

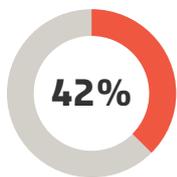
A US survey, for example, found that half of the respondents and **three-quarters** of Millennials said they would take a lower salary to work with an environmentally responsible employer.

40% of millennials said they had chosen an employer based on environmental credentials. This compares to a quarter of Gen X and **17%** of Boomers.

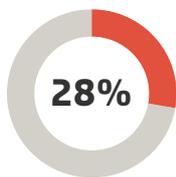
“For businesses the direction of travel is clear. By 2025, 75 per cent of the working population will be millennials, meaning they will need to have credible plans to address ESG if they want to continue to attract and retain this growing pool of talent.”
- KPMG.

Research Highlights and Recommendations:

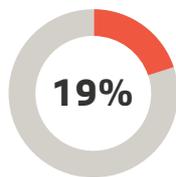
Mind the Gap



Of Gen Z are more likely to say their mental health is “somewhat good”



Of Gen X report mental health as very good



Of Gen Z say mental health is “somewhat poor”

We see similar generational trends in reporting physical health

Findings point to a strong employer-employee disconnect



Wellness benefits everyone

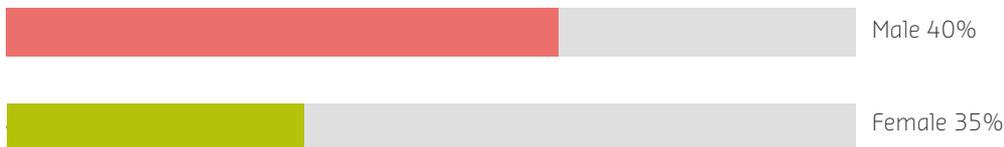
- + Personal satisfaction is key to productivity
- + Social well-being and psychological safety are important to employees
- + This means creating conditions to build connection and trust
- + Workspaces are not “one size fits all” – some roles and individuals prefer quiet space versus creative bustle – and vice-versa



Gender And Sustainability - Viewing Through A New Lens

In our research, **40%** of men and **35%** of women said environmental sustainability was very important to them. **37%** of men and **45%** of women said it was fairly important.

Gender



A larger male demographic (**56%**) expected responsible energy usage from their employer compared to **47%** of women.

Conversely, more women than men expect employers to prioritise waste (52% to 48%, respectively) and plastics management (52% to 46%, respectively).

Our findings contradict other research, which suggests an 'eco-gender gap'. For example, a 2018 study by Mintel revealed that UK men are less likely to pursue environmentally friendly behaviours than women:

- **67%** men versus **77%** women regularly recycled.
- **58%** men versus **64%** women regularly turned the thermostat off or down.
- **30%** men versus **38%** women always try and use less water.
- **27%** men and **33%** of women regularly compost food waste.

The report speculates that caring for the environment may undermine their masculinity.³⁴



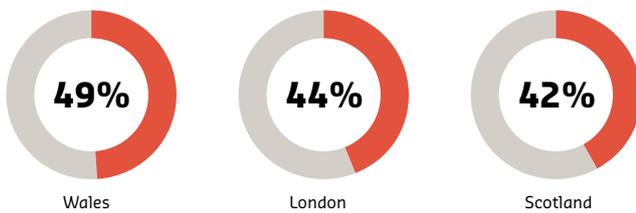
However, in our research, the highest-ranking demographic in the category who think sustainability is very important is male (40%)

Has the energy crisis changed perceptions, offering a way of caring about energy usage on the cost level, not climate change? Or have we moved beyond the eco-gender gap?



Regional Attitudes To Sustainability

The top three areas in the UK that rate **environmental sustainability** as very important are:

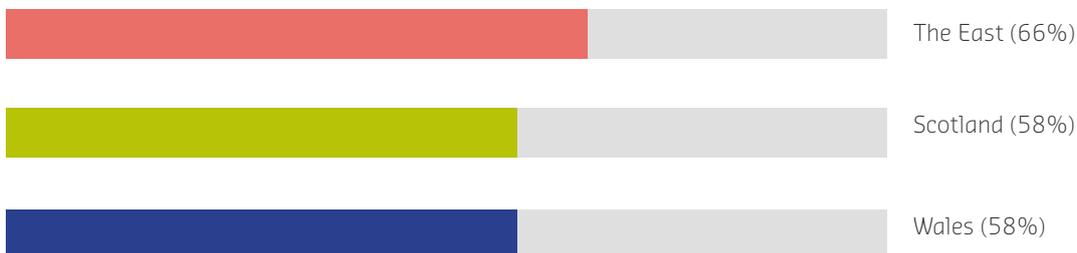


The area where the fewest employees say environmental sustainability is very important is the East (22%).

This result is not unexpected and maps to political attitudes about climate change.



In terms of expectations of their employer, however, the top three areas that expect **responsible energy usage** from their employer are:



The area where the fewest employees expect their employer to act on responsible energy usage is London (48%).

This anomalous pattern for the East may be because responsible energy usage is framed as an 'energy inflation' issue. This reading is confirmed by the lowest scores in all the regions for the East on expectations for responsible waste management (34%) and plastics recycling (41%).



In our survey, respondents were asked about the frequency of food choices for those working 100% onsite or hybrid:

- **64%** of workers who are said they bought a meal from home.
- **46%** from a food outlet.
- **45%** from a convenience store or supermarket.

Only **40%** used workplace food facilities.

This compares to **79%** who say, when working at home (they are either 100% remote or hybrid), they prepare food at home.

While sourcing food from cafes and stores boosts the economy to some degree, it is questionable whether it is sustainable.

Food is an intrinsic part of sustainability. From how food is grown and sourced to how it is prepared, food is tied up with the ecosystem.

Employers could enhance their sustainability commitments by providing healthy, locally sourced food options for employees. In turn, this may boost health in a population where almost half of the average family's diet is ultra-processed.

Vital Spaces

Sustainability affects space – how the workplace is organised and whether it integrates environmentally friendly, ethical behaviours.

And it is connected to people – what employees care about, what they expect from their employer, and how this drives their employment choices.

In this way, sustainability agendas may become part of the perceived benefits of the job.



“The insights from this report showcase the beginning of greater understanding and expectations of employers’ sustainability progress. This is against the backdrop of a progressive ESG regulatory landscape and greater transparency of how businesses will be impacted by climate change risks.

It makes commercial business sense for employers to embed sustainability into working practices for attraction and retention of employees, to manage risk, to be compliant and to mitigate rising costs. There are multiple benefits; those businesses that embrace the opportunity will be rewarded.”

– Claire Atkins-Morris, Director of Corporate Responsibility, Sodexo

Key Considerations

- + Energy inflation may be moving the dial on environmental awareness through the gateway issue of energy inflation. In some areas, employers may face new expectations in the sustainable management of resources. This is also closely linked to the cost of living crisis in the UK and is at the forefront of people's minds.
- + There may also be an element of employees placing the onus on employers to manage workplace sustainability sufficiently – or even, in the case of urban business centres, like London, expectations that it should go without saying.

People

Key Considerations

- + Act now to address the needs of and engage employees that are 'quietly dissatisfied' to avoid them becoming 'quiet quitters' or actively quitting the workforce.
- + Consider how these employees can be encouraged into the 'totally satisfied' group and act as advocates against quiet quitting.
- + Improving job perks, particularly regarding reward, recognition and support with food, could help boost employee loyalty and help workers manage the cost of living crisis.
- + Improving access to good food options at work or when working remotely could help increase employee satisfaction, retention and performance and support employee health and wellbeing.

Space

Key Considerations

- + Companies need to rethink the role and purpose of the workplace in supporting employees' health, wellbeing and productivity, particularly in times of crisis.
- + Leaders should prioritise the key motivations for employees coming back to the office, which are socialising and connecting with other people.
- + Hence, leaders should shift their focus to social spaces (e.g., office canteens) instead of solely concentrating on collaboration or workspaces. Knowing the purpose of the new workspace will also help companies in curating an elevated employee experience to keep talents and make the trip back to office worthwhile.

Sustainability

Key Considerations

- + Being responsible about energy usage may be moving the dial on environmental awareness through the gateway issue of energy inflation.
- + There may also be an element of employees placing the onus on employers to manage workplace sustainability sufficiently – or even, in the case of urban business centres, like London, expectations that it should go without saying.
- + It makes commercial business sense for employers to embed sustainability into working practices for attraction and retention of employees, to manage risk, to be compliant and to mitigate rising costs. There are multiple benefits; those businesses that embrace the opportunity will be rewarded.

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Acknowledgements

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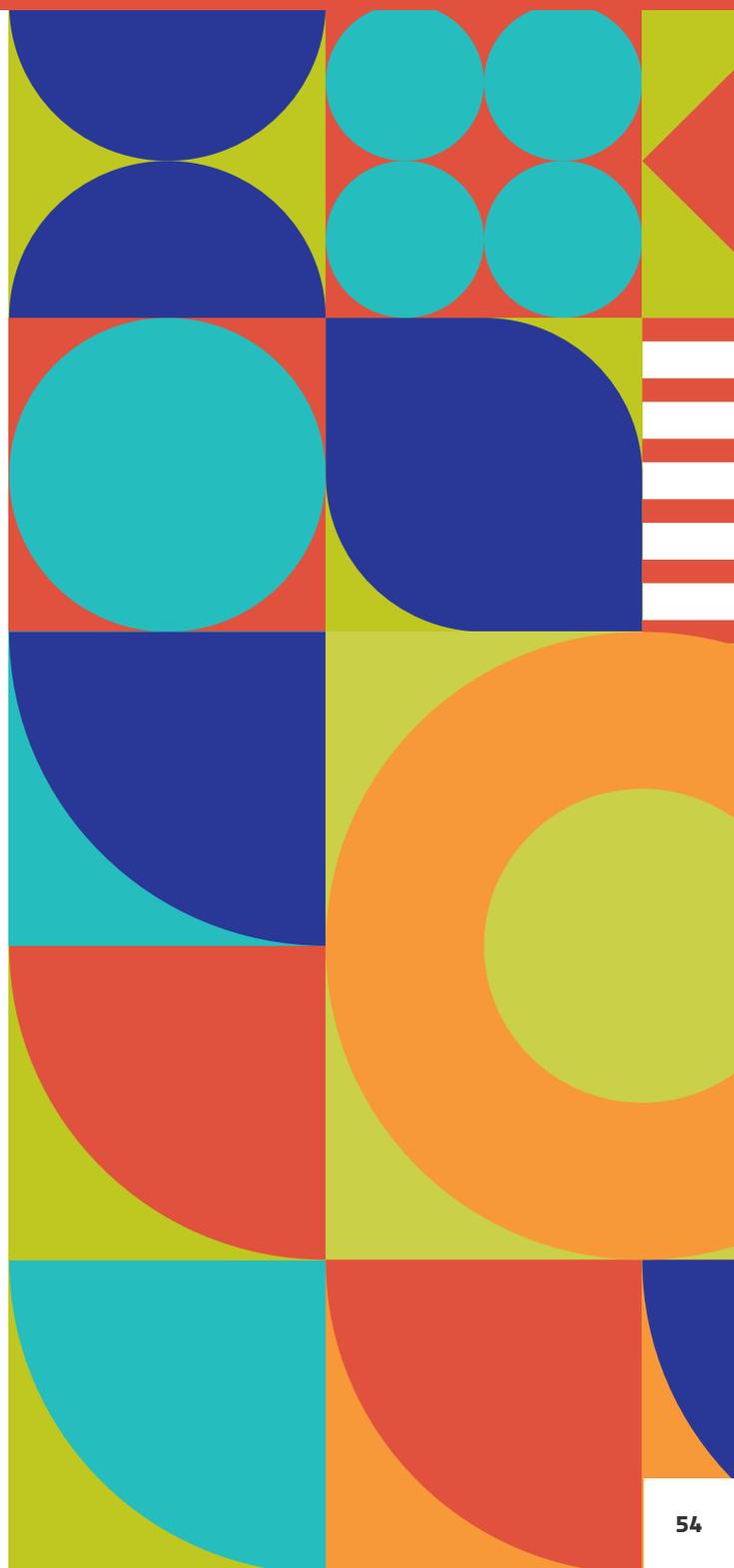
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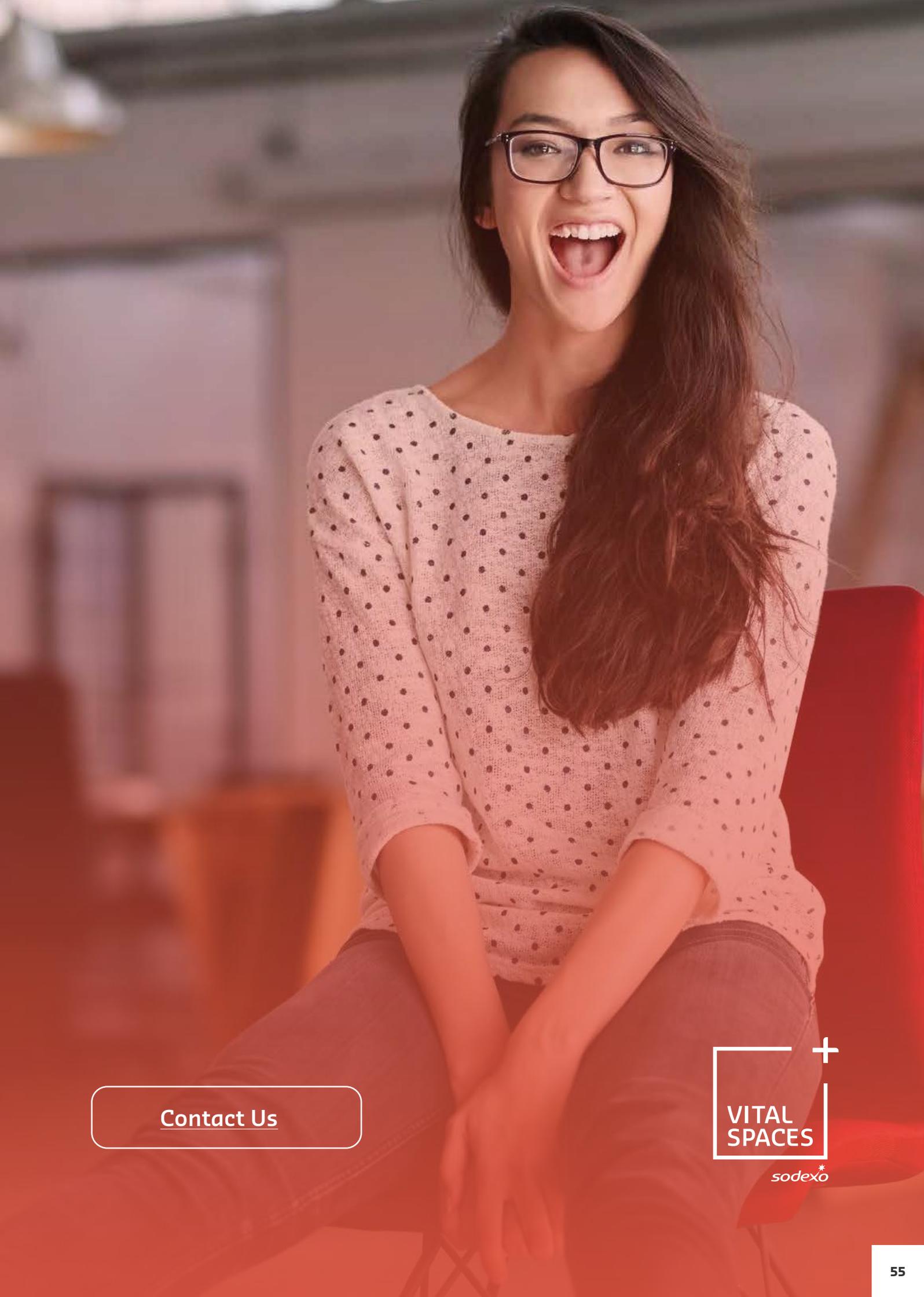
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