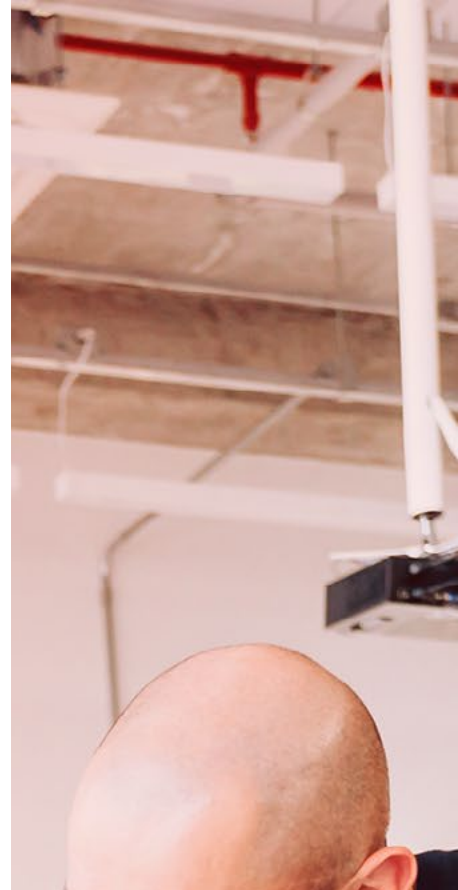




Breathing space:

A new workplace comes to life



sodexo 



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All things to all people?
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Workplaces are in flux

Employers have been forced by the pandemic to try to connect and support a dispersed workforce. The shift to a hybrid workplace model is accelerating, and business leaders now know it takes more than reliable WiFi and ergonomic chairs to equip their remote employees.

Neither one-size nor one-time

A new ecosystem of fluid, dynamic spaces is emerging, with amenities that facilitate collaboration and food service models that reflect employees' ethics. There will be no one-size-fits-all model, says Philippe Casgrain, SVP, Global FM and HSE at Sodexo: "The future will be very different depending on your region, your sector, and whether you're dealing with an office or a manufacturing environment."

// The future will be very different depending on your region, your sector, and whether you're dealing with an office or a manufacturing environment."

Philippe Casgrain,
SVP, Global FM and HSE, Sodexo



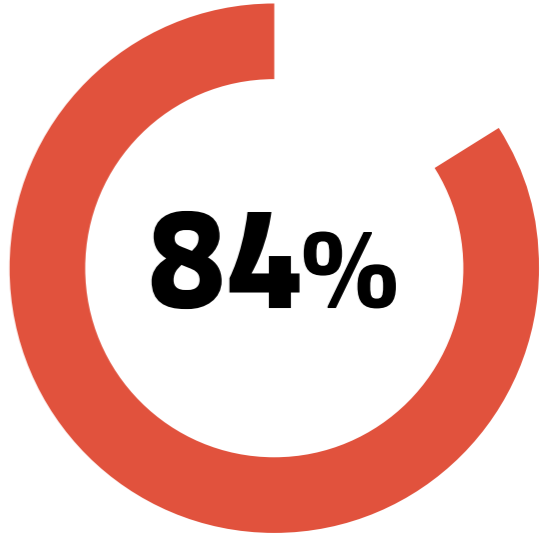
It won't be a one-time transformation exercise either: the future workspace will be a living, breathing entity that develops continuously. For most leaders, the potential gains are undeniable:

Employees need a healthy environment – wherever they are

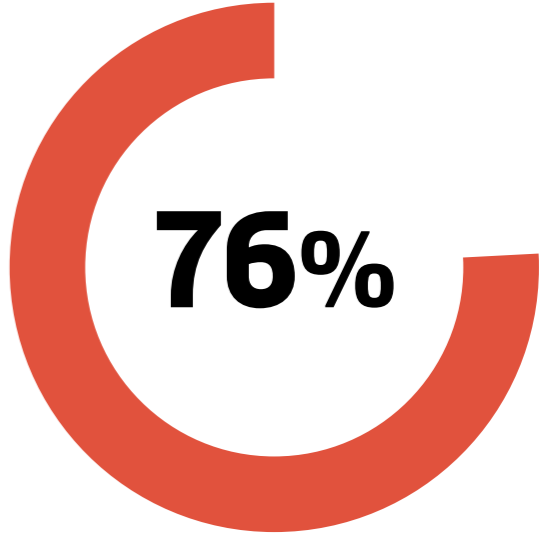
But it's not all good news. Employee wellbeing, for instance, has taken a hit: reports of mental burnout have risen over the past year.¹ A hygienic and healthy environment will make a difference, whether your employees are based at home, in the workplace or in a third space.

So how can organizations support the workforce of the future, whose expectations may have changed dramatically over the past 18 months? How will those needs vary according to business function and worker profile? And what role will food, facilities, inclusivity and sustainability play?

1. <https://www.theguardian.com/society/2021/feb/05/pandemic-burnout-rise-uk-latest-covid-lockdowns-take-toll>
2. 2021 Sodexo Experience Next Corporate Insights Research



believe that freedom to experiment with new working practices has had a positive impact on business



say they are surprised that greater autonomy has had such a positive impact on productivity²





1.

The next workplace: All things to all people?

At the start of the pandemic, doomsayers predicted the demise of the office. Experts now reject this idea, but they do say that the office will need to be more flexible – continually adapting to new user requirements.

Is a hybrid model the best of all worlds?

Eighty-five percent of employees state a preference for a blended-workplace model that includes remote work for at least two days a week, according to a study by workplace research firm Leesman.³

Meanwhile 83% of home-working employees in the Leesman study say that their home environments enable them to work productively – higher than the figure for the average office (64%). However, informal social interaction (55%) and learning from others (66%) are least supported in the home-working environment.

Many businesses are considering reducing office or operations space, with financial services firms, including JP Morgan, Lloyds Banking Group and HSBC, saying they intend to cut office space and introduce more hot-desking and communal and collaborative spaces⁴ while reducing their real estate and facilities costs.

In manufacturing, remote working presents significant challenges due to the need for human oversight. Remote connectivity solutions that track production and machinery status are charting a possible path forward. CEOs believe the future of

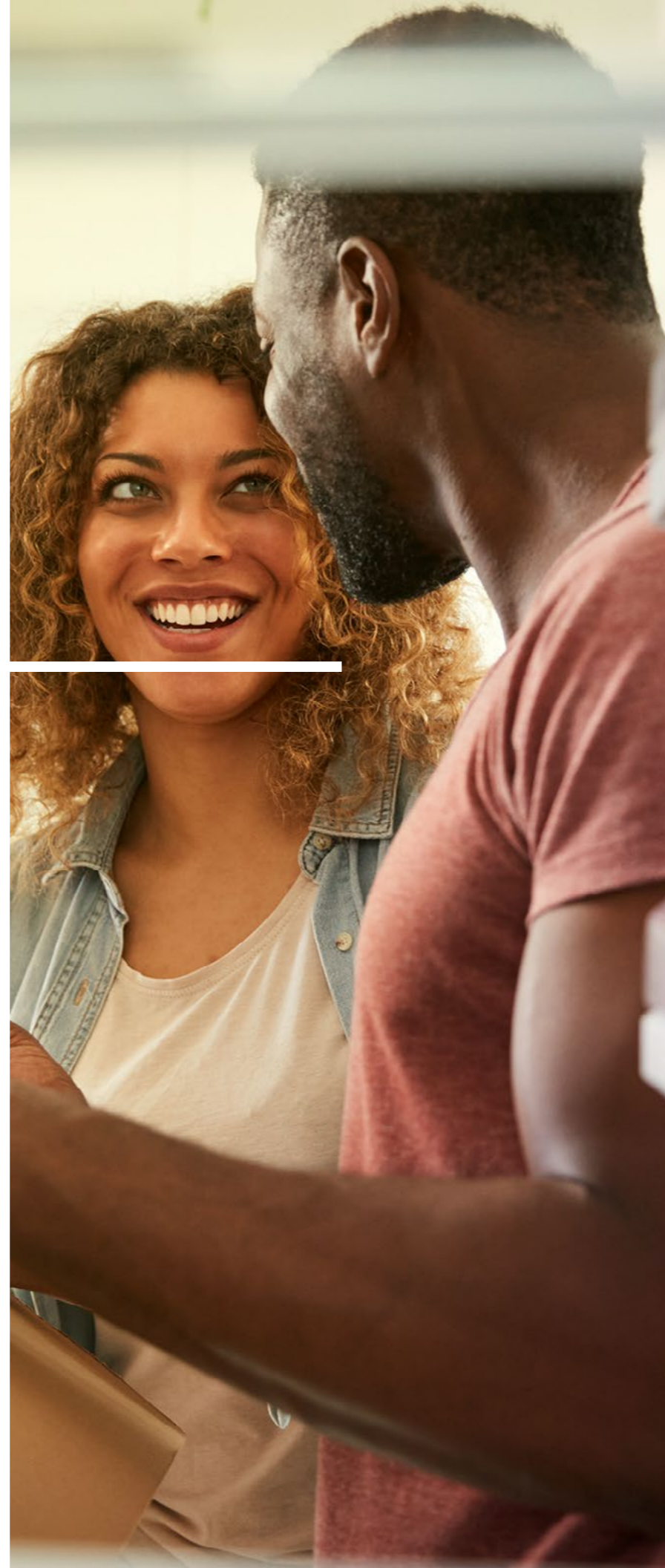
3. Workplace 2021: Appraising future-readiness, Leesman, 2021

4. <https://www.ft.com/content/f568997c-513c-48b0-8422-fabacda46418>



Firms will need to use digital tools to track consumer behavior and make adjustments to their services as they look to manage a widespread return to the office.”

Sylvia Metayer,
Chief Growth Officer, Sodexo



the industry lies in this approach, which will help to automate processes and improve efficiency, with annual investment in smart manufacturing expected to rise among 85% of companies according to research by Manufacturers Alliance.⁵

Manage demand based on behavior

As floorplans are redrafted, there is an understandable wariness around a mass return to the physical workplace: 78% of employees are calling for a staggered process, according to a 2020 poll by the Institute of PR and Harris.⁶

“Firms will need to use digital tools to track consumer behavior and make adjustments to their services as they look to manage a widespread return to the office,” says Sylvia Metayer, Chief Growth Officer at Sodexo.

Firms won’t just have to understand employee occupancy and usage in order to adapt their spaces – they will also need to manage demand more proactively. “You need to understand the demand, act on it and have a space-allocation tool that dynamically drives people to the right place,” says Yannick Villar, CEO and Co-Founder of Wx, a Sodexo consultancy specializing in workplace experience design. “You can leverage space allocation to maximize collaboration, utilization and comfort, as opposed to giving them the choice to do what they want and potentially occupying floors that you were intending to close.”

See [‘elastic offices’](#) in Section 3 for more insight into the tech that will help employees navigate the future workspace more safely and efficiently.



5. <https://www.manufacturersalliance.org/forecasts-data/ten-trends-shaping-us-manufacturing-next-twelve-months>

6. <https://instituteforpr.org/wp-content/uploads/Employee-Expectations-Report-v5-1.pdf>

**Workplace reimagined:
A multifaceted hub**

But if as the Leesman study suggests productivity has gone up as employees have gone home, what value is there in bringing them back to a centralized workplace?

The concept of ‘productivity’ is a tricky one to pin down – it’s highly subjective. For example, 42% of employees polled by PR firm Edelman say they are choosing to return to the office because they work more productively there.⁷ Which seems to contradict the Leesman finding.

And productivity is only one part of the equation, of course. People may work more productively at home for individual tasks, but they often miss the sense of community and belonging found in the physical workplace.

Speaking to the *Financial Times*,⁸ Janet Pogue McLaurin, Global Workplace Research Leader at design company Gensler, expects more open or semi-enclosed spaces for collaborative working and more private spaces for solitary work. This is the opposite of pre-Covid-19 layouts, which saw us working in open-plan offices when we needed to focus and retreating to meeting rooms for more collaborative tasks.

“People are not coming to the office to be in the office anymore – they are coming into the office to accomplish something,” says Prescott Gaylord, Head of Sustainability, Corporate Real Estate Strategy and Administration at DBS Bank in Singapore. “If you’re there for collaboration, the space needs to be versatile enough for you to collaborate in the way that you need to collaborate. It needs to be focused on both the new tasks and the wellbeing of everybody involved.”



People are not coming to the office to be in the office anymore – they are coming into the office to accomplish something.”

Prescott Gaylord,
Head of Sustainability, Corporate Real Estate
Strategy and Administration, DBS Bank

7. WFH and Productivity PDF; p28/39 (Edelman 2021 Trust Barometer)

8. <https://www.ft.com/content/f568997c-513c-48b0-8422-fabacda46418>



Each employee will have very different experiences and expectations when they return to the workplace, so that flexibility will be key.”

Philippe Casgrain,
SVP, Global FM and HSE, Sodexo

A workplace tailored to each of us

Many of us have now had more than a year of working with all our home comforts close to hand, in a space that we have configured to one person: ourselves. When we do finally return to shared workplaces, will we expect the set-up to be just as attuned to our needs?⁹

“Needs and ways of working vary markedly across sectors”, says Sodexo’s Philippe Casgrain, pointing to the banking and tech sectors where homeworking was much more established than manufacturing, for example, pre-Covid. “There are different legal and cultural frameworks to contend with and some sectors will move much faster than others, so flexibility is extremely important going forward.”

Simon French, Workplace & Design Director at GSK, expects a move to a “behavior-based working” model, where workplace design is driven by employee activity. This would mean fewer fixed desks, and more multi-functional spaces that give employees full flexibility in how they work – such as breakout spaces for team meetings and individual hot desks for more focused work as needed.¹⁰

Airbnb’s Belong Anywhere workplace concept is an example of this new way of working. It provides employees with ‘landing stations’ rather than dedicated spaces, which allow them to charge their laptops and phones and lock up belongings. This gives them the freedom to find the area in the office where they work best for each task.¹¹

Flexibility in the future workplace is both professional – in the design of new spaces – and personal, in terms of employees’ expectations. “Some people are much more comfortable in a very social environment; others are very happy working from home”, says Casgrain. “Each employee will have very different experiences and expectations when they return to the workplace, which means that flexibility will be key.”

Fuel for a transformed workplace

Just as firms must adapt their physical spaces, food models must evolve to connect people, place and purpose.

Most leaders (78%) agree that they need to find innovative food models to fit a new era of work – whether that is offering healthier options in the workplace or catering to the needs of their remote workforce.¹² And 63% say that food and catering facilities will be important when a widespread return to the physical workplace becomes possible.¹³

“When employees go back into the workplace, there will be an opportunity to reconnect with the company and brand that they work for, but also with their fellow workers”, says John Wright, Senior Vice President, Global Head of Food at Sodexo. “Food will play a pivotal role in contributing to that overall experience and feeling of being valued.”

9. Workplace 2021: Appraising future-readiness, Leesman, 2021

10. https://www.nespresso.com/ecom/medias/sys_master/public/13796500865054/Nespresso-Professional-Future-of-Work-Whitepaper.pdf

11. <https://medium.com/jacob-morgan/3-lessons-from-airbnb-on-creating-an-amazing-employee-experience-4a6d2a205db7>

12. 2021 Sodexo Experience Next Corporate Insights Research

13. Ibid.

2.

Technology is the great enabler

Businesses put (remote) employees first

The remote-working trend is inescapable. Small and medium-sized enterprises (SMEs), for instance, have indicated that they will move budgets away from the physical workplace and toward digital and remote environments.¹⁴

Sodexo's own research finds an emphasis on remote employees: leaders say that virtual spaces such as 'Zoom rooms' (77%) are most important when a widespread return to work becomes possible, followed closely by flexible spaces such as hot-desking (75%), individual spaces such as assigned desks (68%), and collaborative spaces including breakout zones (67%).¹⁵

When it comes to preparation for remote-working, more than half of employees (53%) expect their employer to provide new tech, hardware and internet connections, and a similar figure (51%) expect online webinar and training programs.¹⁶ But Microsoft¹⁷ finds that, well over a year since the pandemic began, 42% of employees say they lack essential office supplies at home, and only half (50%) say their employers help with remote-working expenses.



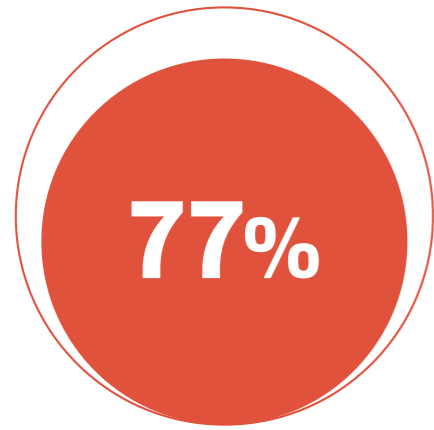
14. http://community.ifma.org/knowledge_library/m/premium_content/1058234

15. 2021 Sodexo Experience Next Corporate Insights Research

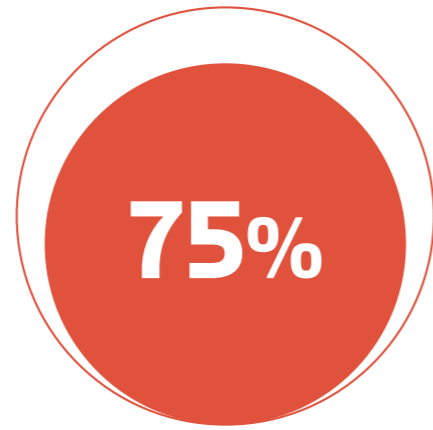
16. https://www.nespresso.com/ecom/medias/sys_master/public/13796500865054/Nespresso-Professional-Future-of-Work-Whitepaper.pdf

17. https://ms-worklab.azureedge.net/files/reports/hybridWork/pdf/2021_Microsoft_WTI_Report_March.pdf

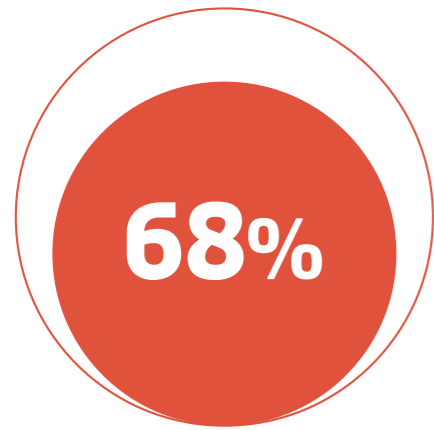
Compared with pre-pandemic, how important will the following elements of your place of work be when a widespread return to physical workspaces becomes possible?¹⁸



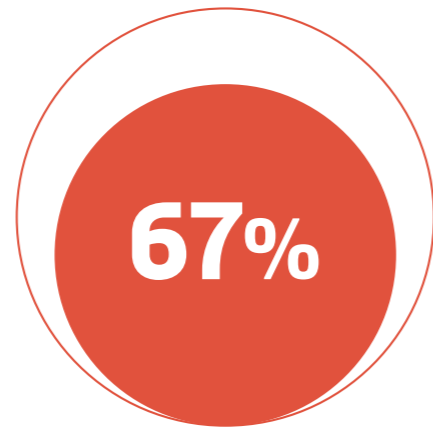
Virtual spaces



Flexible spaces



Individual spaces



Collaborative spaces



Whose cost is it?

A more permanent transition to remote working could shift liability for workplace amenities costs from employers to employees. “Employers will need to consider how they invest and adapt to the new working realities of their employees,” says Sodexo’s Philippe Casgrain. “They will need to do much more to ensure their workspaces are optimized and they look after both their employees’ physical and mental wellbeing. Much of this will depend on the employer, the country and the legal framework, of course, but it is clear that there will be a shift.”

Even in more location-dependent sectors, such as manufacturing, more than half of businesses were already considering some degree of hybrid working prior to the Covid-19 crisis.¹⁹ However, remote working will not be viable for all employees – for example, those who work in specialist fields or in roles that require regular access to technical equipment.

For others, the shift to hybrid and new working models could result in both cost and environmental savings. For instance, PepsiCo has announced the launch of Work that Works, a new corporate policy that mandates no default day-to-day workplace for its headquarters workforce.²⁰ In addition to scaling down its real estate footprint and tapping into a wider talent pool, PepsiCo says it will save 70 tons of greenhouse gas emissions for every 100 employees that work from home twice a week.²¹

18. 2021 Sodexo Experience Next Corporate Insights Research

19. <https://assets.regus.com/pdfs/iwg-workplace-survey/iwg-workplace-survey-2019.pdf>

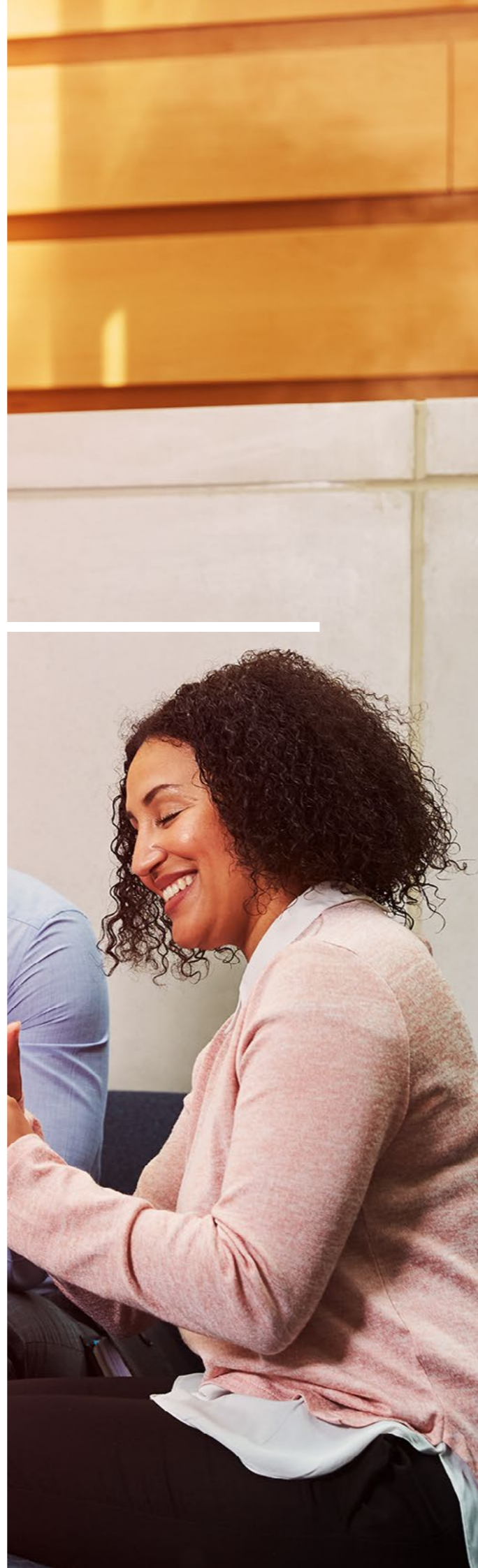
20. <https://consumergoods.com/pepsicos-future-work-flexible>

21. Ibid



Employees want much more personalization in terms of what they do, where they do it, how they behave, what they consume – in everything. The enabler for that personalized experience is data analytics.”

Yannick Villar,
CEO and Co-Founder of Wx, Sodexo



Strengthening connections using tech

Workspaces have to be collaborative, whether employees are in the office or working remotely. For that, we will need technology that synchronizes schedules, books desk space and improves videoconferencing.

‘Casual and informal exchanges’ and ‘hearing a broader set of views from colleagues’ have become more difficult to facilitate in a remote-working set-up, according to 92% and 70%, respectively, of business leaders polled by Eden McCallum.²² And as more workplaces adopt a video-first approach, firms will rely on digital tools, artificial intelligence, the Internet of Things and augmented or virtual reality to help improve connections between employees.

Companies are already using asynchronous communication tools to enable employees to exchange information efficiently but not in real time.²³ One software platform, [Loom](#), allows employees leave video messages in documents to walk colleagues through directions or important context. [Threads](#), meanwhile, is a platform that allows employees to join in with questions and decisions at their convenience – instead of at scheduled meeting times.

Technology is also helping manufacturing firms overcome operational disruptions caused by Covid-19, according to Deloitte research,²⁴ for example, installing computer vision systems to enable virtual plant tours for customers; adding wearable devices for line workers to signal when they are flouting social distancing rules with co-workers; and adding collaborative robots or “cobots” to augment workforces who can no longer operate shoulder to shoulder on the factory floor.

But beware tech overload

The Covid-19 crisis has underlined the importance of digital training and development, and virtual-learning platforms and solutions will be vital to keeping businesses innovative and productive – particularly given the varying levels of technological maturity between departments and individuals. With ongoing concerns around privacy and data ownership, however, firms will need to tread carefully to avoid employee pushback on new technologies.

Balancing this digital collaboration will also be important not only to minimize tech overload among employees, but also because of the surprising sustainability implications of increased video conferencing: video calls are 25% more carbon intensive than voice-only calls.²⁵

According to Sodexo’s Sylvia Metayer, firms will shift to a **“consumerization of the work environment”** to draw employees to the office, and this will be underpinned by new technologies, data and predictive analytics.

“The interaction between the consumer and the service, which is provided by the employer, will become increasing personalized,” she says. “The way people interact when they’re in these new spaces is going to be completely different.”

Wx’s Yannick Villar agrees. “Employees want much more personalization in terms of what they do, where they do it, how they behave, what they consume – in everything,” he says. “The enabler for that personalized experience is data analytics. Previously firms would have looked at data patterns for the last 12 months and replicated it for the following year, but the standard deviation has grown exponentially. You now need much more powerful algorithms to predict what people will want.”

22. <https://edenmccallum.com/managing-the-covid-19-crisis-the-ongoing-impact-of-remote-working/>

23. <https://time.com/collection/great-reset/5900753/rethinking-work-covid-19/>

24. <https://www2.deloitte.com/us/en/insights/industry/manufacturing/accelerating-smart-manufacturing.html>

25. <https://www.sodexo.com/inspired-thinking/emissions-WFH-energy-footprint.html?t=1>

3.

New workplace for a better world

Many businesses' plans for the future workplace incorporate physically inclusive and sustainable spaces that can be adapted and flexed continually to meet the needs of users.

This comes as 73% of business leaders say that existing and potential employees are scrutinizing their sustainability policies and demanding more climate-positive action. And 67% of SMEs expect the pandemic to change organizations' and workers' practices, leading to more environmentally sustainable economic development.²⁶

When they think about transformation, firms should start with one question, according to DBS Bank's Prescott Gaylord: "Does this make the world better? That might mean operating in a carbon-neutral way, or looking at the materials and making sure they're making the world better, instead of just mitigating the damage," he explains. "Change allows us to rethink things and push forward. It gives us an opportunity to look at the green recovery and operational sustainability."

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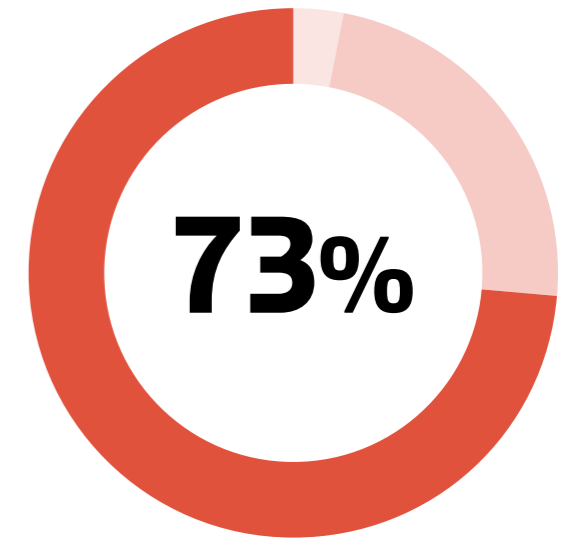
Prescott Gaylord,
Head of Sustainability, Corporate Real Estate Strategy and Administration,
DBS Bank

26. http://community.ifma.org/knowledge_library/m/premium_content/1058234

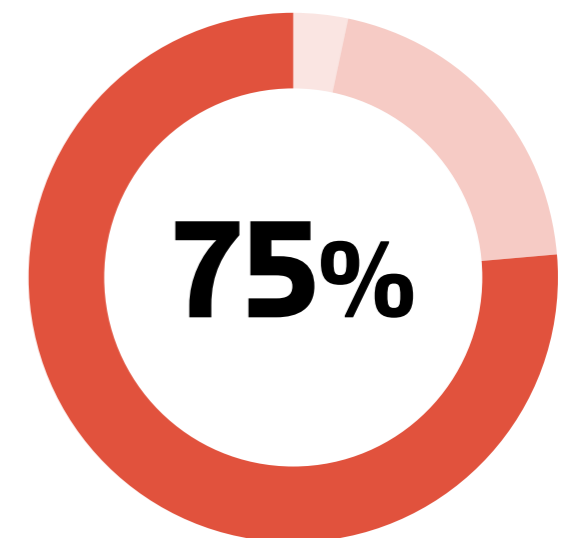
27. 2021 Sodexo Experience Next Corporate Insights Research



Do you believe that the following have become more important to your employees over the last 12 months, or less?²⁷



Sustainability policies and practices
Much more or more important: 73%
About the same: 23%
Much less or less important: 3%



Equal opportunities and diversity
Much more or more important: 75%
About the same: 20%
Much less or less important: 3%

Elastic offices are greener offices

Modularized office design is enabling firms to reuse fit-outs to minimize their environmental footprints. Microsoft's new office in Israel, for example, uses a 'flexible grid' system that allows teams to combine or divide spaces, and features acoustic partitions and shelving that can be reconfigured. The firm says that reducing the office's long-term impact on the environment was a priority.^{28, 29}

Firms are also looking beyond new-build solutions and are considering retrofitting existing offices to improve energy efficiency and minimize the lifetime carbon footprint of their buildings. The University of Cambridge's Institute for Sustainability Leadership is one example. It is merging five of its offices and transforming a 1930s telephone-exchange building into an ultra-low-carbon sustainability hub.³⁰

Such tech will be increasingly in demand as firms grapple with fluctuations in people flow.

"Being predictive about the use of space is going to be quite tough," says Sodexo's Sylvia Metayer. "Not just the use of the space, but also how people travel through it. It's going to create greater fluidity between employers and employees."

Smart technologies and data analytics are already helping landlords and operators to monitor metrics such as occupancy ratios and real-time energy consumption. Space experience, for instance,

which has been launched by Sodexo's workplace experience design consultancy Wx, measures company's office use, helps to optimize facilities management services, and gives workplace leaders the data and analytics they need to define their future workplace requirements.³¹

The payoff of this fluidity is significant. "Your spaces become better designed, better to work in, and everybody wants to come to work more," says Gaylord.

Inclusivity in and out of the office

Workplace transformation is giving employers the chance to boost their diversity and inclusion efforts. Leaders are aware of the importance of a workplace designed with equality in mind: 75% say that equal opportunities and diversity have become more important to their employees in the past year.³² And now, they have the opportunity to put equality right at the center of the transformation process, with universal design and more flexible working practices.



Sodexo focuses on inclusivity

In 2021, Sodexo launched a number of inclusivity-focused initiatives including a \$10m scholarship program for Sodexo employees and their dependents to attend historically black colleges and universities in the US, and a new partnership with Women Back to Work, which aims to bridge the employment gap for women looking to re-enter the workforce.

"Instilling a culture of belonging drives business performance and helps us to realize our quality of life mission," says **Mia Mends, Global Chief Diversity, Equity and Inclusion Officer and CEO, Impact Ventures, Sodexo North America.**

"And on a personal level, I am motivated knowing that I work for a company that represents many types of people."

28. <https://news.microsoft.com/features/israel-campus/>

29. <https://www.weforum.org/agenda/2021/01/office-future-microsoft-covid-19/>

30. <https://www.cam.ac.uk/news/world-first-sustainable-office-retrofit-begins-at-new-cisl-headquarters>

31. <https://www.fmj.co.uk/sodexo-launches-space-experience-from-wx/>

32. 2021 Sodexo Experience Next Corporate Insights Research



These shifting dynamics are boosting firms' ability to attract, retain, develop and engage diverse talent, which we know underpins strong business performance and allows them to serve their communities in a more meaningful way."

Mia Mends,
Global Chief Diversity, Equity and Inclusion Officer and CEO, Impact Ventures,
Sodexo North America

Design to include everyone

The ability to design physical workspaces with a greater inclusivity could be particularly beneficial to people with disabilities and workers who are neurodivergent, says IFMA.³³ Private, quiet, low-stimulation spaces will be especially important for those who are neurodivergent.³⁴

Modular, multifunctional spaces that enable teams to clear or reconfigure rooms are also growing in popularity.³⁵ During the pandemic, workplace start-up ROOM launched mini modular workspaces that can adapt spaces in traditional offices. The products are engineered with recycled materials and replace multiple cycles of construction, minimizing noise and the environmental footprint.

Engage every employee

From online quizzes to virtual water-cooler meet-ups and happy hours, employers are finding new ways to create an inclusive remote-working environment.

The rise of remote working itself could make it easier to attract and hire under-represented talent, according to analysis provided by the LinkedIn Economic Graph, which indicates that women, Generation Z and those without advanced degrees are more likely to apply for remote jobs.³⁶

"These shifting dynamics are boosting firms' ability to attract, retain, develop and engage diverse talent," says Mends. "Which we know underpins strong business performance and allows them to serve their communities in a more meaningful way."

As well as diversifying their recruitment strategies, says IFMA, employers must address the needs of workers from adversely affected minority communities who lack access to infrastructure, tools and spaces in which to work remotely.³⁷

And managers in particular should ensure that remote meetings are inclusive and tasks are assigned fairly. For example, who does a job on the factory floor that could or should be performed remotely? And who must remain on site? Employers will need to give fair treatment and consideration to workers who are experiencing childcare or shielding challenges because of Covid-19.

33. http://community.ifma.org/knowledge_library/m/premium_content/1058234

34. <https://www.workspace.co.uk/content-hub/marketing/how-to-make-your-office-space-more-neurodiverse>

35. <https://www.architectmagazine.com/project-gallery/connect-work>

36. LinkedIn Economic Graph; Microsoft Work Trend Index: 2021 Annual Report; p17

37. http://community.ifma.org/knowledge_library/m/premium_content/1058234

Conclusion

The ongoing evolution of the workplace depends on employers measuring changes in work behaviors and adapting to them – rapidly.

But first, they must take critical steps to align with their workforces. “We’re coming into a world where employers’ and employees’ views of what happens in the workplace are going to be more divergent than they have been in a long time,” warns Sodexo’s Sylvia Metayer.

Forty-one percent of the global workforce is likely to consider leaving their current employer within the next year,³⁸ so organizations cannot afford to stand still. If they do, they will neither recruit nor retain the best talent.



How to act on your workplace vision with confidence:

The three Ps

To build the vital workplace of the future, leaders must ensure people-centricity is at the heart of all workplace policies and that spaces strike the right balance between efficiency and optimization, and catering to the needs of employees.

- 1. Place**
Rethink your approach to workplace transformation, and don’t do it in a vacuum. Designing spaces for all people – and all modes of work patterns – will be key moving forward. “Start bringing employees into the conversation about the design of their workspace,” says Metayer
- 2. People**
Are you mining your employees’ data effectively to optimize their workplace experience? Increasingly, they will expect a more personalized approach, so consider what benefits you can offer to encourage them to share their preferences – then give them what they want.
- 3. Purpose**
Take CSR seriously. What are you doing to look after your employees’ physical and mental wellbeing and avoid digital burnout? Have you created an environment where diversity and inclusion are valued, differences are catered for, and more people of color, women and people with disabilities feel like they have a seat at the table? Demonstrate your commitment to creating a better future, and ensure your workspaces embody this ethos.

38. https://ms-worklab.azureedge.net/files/reports/hybridWork/pdf/2021_Microsoft_WTI_Report_March.pdf



Is your workplace future-ready?

To learn more visit

<https://www.sodexo.com/home/your-industry/business-industry.html>

Contact us