

The flexible and individualized work life in 2030 – utopia or dystopia?

What do professionals expect from work life in 2030? And how should employers face the work life trends that are expected to dominate the new decade?

This report is based on the fourth and final part of a quarterly survey on Swedish professionals' attitudes to today's work life, as well as a supplementary survey on their expectations and concerns about work life in 2030, carried out by Novus on behalf of Sodexo.

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Date: Dec 2, 2022

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Executive summary

Results from the survey:

- The proportion of professionals who report that the employer has decided that employees must do their work full-time in the office has decreased from March to October 2022. The proportion allowed to decide for themselves from where to work has also increased.
- In March 2022, one in three professionals said they were thinking about changing jobs. That number has now gone down: in October, one in four professional workers were considering changing jobs.
- Social interaction remains the most important function of the shared workplace.
- Better leadership, a more pleasant physical work environment in the office, and the possibility to work more flexibly remain the top-three answers to the question of what would improve the work situation for professionals.
- Overall, professionals have a bright view of the future. Four out of ten believe that work life in their own industry will change for the better until 2030, while a sixth believe that it will get worse. The outlook is gloomier among professionals who feel that work life was worse during the pandemic, as well as those who work in education, healthcare and welfare.
- A majority believe that work life in 2030 will mean increased opportunities to influence when you work, how much or how little you work, as well as your own work and job role. Most also believe in greater opportunities to develop and broaden their skills.
- Three out of four professionals believe that hybrid work will be the main way of working in 2030.
- On the wishlist of what professionals want work life to contain in 2030, shorter work weeks are at the top, followed by more flexible working hours and the ability to choose to work from anywhere in the world.
- Every other employee believes that it would be negative for them to work under freelance-like conditions in 2030, and only 15 percent believe that it would be positive.
- Five work life trends will be particularly important for what work life looks like in 2030: remote work, purpose and values, individualization, globalization, and servitization.

Sodexo's recommendations for employers and companies:

- Dare to try new solutions and adapt to the new work life. This will be crucial to remain relevant to customers, partners and employees.
- Invest time and resources in understanding the employees' individual driving forces, conditions, needs, challenges and roles in the team. Committed employees who get to devote themselves to what they deem as meaningful and skill-developing tasks are the key to finding solutions that build both a strong corporate culture and the company's competitiveness.
- Offer flexible working hours and the ability to work remotely to all employees to the extent possible, including those whose work is traditionally tied to a physical workplace.
- In the individualized and hybrid work life, the leadership should shift from being steering and controlling to coaching. Self-determination and opportunities for skill development generate committed employees who take great personal responsibility for their work and drive the company forward.
- Leverage new services, technology solutions and innovations to improve the work environment for a distributed workforce in a hybrid workplace. This contributes to creating as meaningful and skill-developing tasks as possible for both employees and managers, facilitates remote work, meets individual needs and strengthens the company culture. Automation and servitization help professionals to perform and can also create new job and business opportunities.

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Introduction

Five trends affecting the work life of the future

The past years' pandemic and war in Europe have reminded us that we cannot always predict the external factors that have major consequences for people's everyday and working lives. Less than a year ago, many of us expected an economy on the rise in connection with a vaccinated population and eased restrictions. Instead, we now find ourselves in an imminent recession, where households struggle with increased costs for food, rent, mortgages, electricity and fuel. While it is important to bear in mind that external events can change conditions quickly, there are strong trends that affect work life today, and that with high probability will gain even greater importance during the remainder of the 2020s.

At Sodexo, we have identified five important trends for work life in the coming years. What they all have in common is that they contribute in different ways to making work life more dynamic, free and flexible. In this section, we highlight valuable insights and perspectives from Magnus Löfsjögård, head of Digital Innovation in Sweden at Sodexo and responsible for Sparx in Europe. Sparx is Sodexo's accelerator program for startups with innovative solutions for companies and individuals in the service industry, and is described by Magnus Löfsjögård as follows:



The whole idea with Sparx is that we make people's working lives easier through innovation. When work life changes at a rapid pace, a great need for innovation arises. We have therefore chosen to bring in companies with driven entrepreneurs that we believe are moving the service industry in a new direction.

1. Remote work – the flexible revolution

Barely six months into the pandemic, Sodexo commissioned Kantar Sifo to conduct a survey among 700 Swedish companies and businesses with more than 50 employees. The results gave clear indications that remote work would continue also after the restrictions were lifted ([Sodexo, 2020](#)). Now here we are, asserting that remote work has become a trend in itself. A trend that accelerated due to the pandemic and was made possible by digitization. Restrictions on gathering physically no longer exist, and a large number of professionals still work fully or partially remotely. In the spring of 2022, less than a quarter of Swedish professionals and managers stated that they will work full-time from a shared workplace in the future ([Sodexo, 2022](#)). Hybrid work, and for some fully remote work, is the new norm. A clear example of this is that recruiters and employers can now tag job ads on LinkedIn based on where the work is to be carried out: on-site, remotely, or a hybrid of the two.

Remote work brings a number of different changes to work life. New demands are placed on management to create and maintain a shared corporate culture, take responsibility for the work environment, and manage the actual work. New roles, skills, work life services and service outside the office emerge – closely linked with new technology and increased automation. One such example is recruitment, where AI and automated processes have come to play a greater role. ([LinkedIn, 2022](#)).

Property owners also see how the supply of premises is changing based on the fact that companies are increasingly demanding flexible leases, both in terms of commitment period and the possibilities to alter the premises. ([Kristoferson & Lithaner, KTH 2020](#)).

For employees, remote work means both opportunities and challenges. Higher productivity, greater demands on self-leadership, better balance between work and leisure and greater opportunities to put the everyday puzzle together are all effects of remote work we have seen during the pandemic. Recently, phenomena such as flexibility stigma, proximity bias and quiet quitting have also surfaced.

The stigma surrounding remote work is that in particular women and mothers who work from home may be seen as less dedicated to the work. This leads to a favoring of those who are in the office through better development opportunities and salary growth – known as proximity bias. An A-team and a B-team can appear among the employees, where the A-team in the office receives attention and benefits, while the B-team that works remotely is overlooked to a greater extent and then ultimately risks lost commitment to work ([BBC, 2021](#)). Studies show that the stigma surrounding remote work leads to women leaving the workforce, completely or in part ([Forbes, 2021](#)).

Quiet quitting is a term that, in spite of its name, doesn't primarily refer to employees leaving their jobs, but who rather do what they are expected to but no more because of lacking commitment. According to a Gallup survey from the third quarter of 2022, quiet quitters make up at least 50 percent of the American workforce. Work commitment has gone down overall since the entry of remote work during the pandemic, and is primarily seen as a result of weak leadership ([Gallup, 2022](#)). Flexibility stigma, proximity bias and quiet quitting are phenomena managers and employers need to manage to keep talent and create an inclusive work culture that engages rather than divides the employee group.

2. Purpose and values

One of the demands placed on leadership to maintain employee engagement is to identify, be clear about, and live by the company's values. A majority of reports in recent years show that these are key factors in attracting and retaining talent. Already in 2016, eight out of ten Swedes stated that it was important that employers organized the business based on clear values. In order for the employees to feel that the work is meaningful, it is also central that the company has a higher purpose than generating money for the business. The same survey shows that every fifth Swede believes that a clear purpose is the most attractive thing about a job offer ([Manpower Group, 2016](#)).

"I see a big increase in innovations linked to sustainability, purpose and values, which are also increasingly important to companies. Working on becoming more sustainable and taking responsibility has become a hygiene factor, companies can't get away with less anymore and are more scrutinized. A clear example of this is the Swedish company Worldfavor, which helps companies with transparent and simplified reporting and insights linked to ESG"

– Magnus Löfsjögård

That work life is becoming more purpose and value driven becomes especially clear if we look at what generation Z, people born from the mid-1990s onwards, value in an employer. Today's young people are the most socially engaged generation since the late 1960s, and they believe that one of the most important factors when choosing an employer is that they contribute to the benefit of society. 55 percent of Swedes aged 20-24 state that it is important that the employer takes responsibility for sustainable development (social, economic, climate) ([Ungdomsbarometern, Sobona, 2022](#)).

In addition to clarifying that the employer is socially beneficial and has a higher purpose, it therefore becomes important for the leadership to capture the employees' individual values and find common denominators between these and the company's own goals and values.

The purpose and value driven work life can be seen in the light of an extensive sustainability trend that almost all companies and organizations need to relate to today. Employees, consumers, customers and other stakeholders all place higher demands on companies' and employers' transparency and ambitions in sustainability. It is almost a hygiene factor to work with sustainability at strategic management team level, from a social, economic and climate point of view ([the Federation of Swedish Innovation Companies 2022](#)).

3. Individualization

Increased individualization and personalization is a trend that interacts with servitization, flexibility and globalization. Individuals are the most important assets of a company and individuals increasingly view their careers from an individualistic perspective. The identity creation has for individuals long been defined by career choice, and now more factors than the status of the profession come into play, such as the employer's values and purpose. In the report "[From fruit basked to festivity, freedom and renewal](#)" (2022) from the Federation of Swedish Innovation Companies (Innovationsföretagen), the shift from a collective perspective on work is highlighted, as in how and where work is to be conducted to more personalized opportunities.

In a work life with more knowledge-driven and thought-demanding professions, knowledge production plays an important role, and this is largely made up of individuals' cognitive work. The Federation of Swedish Innovation Companies argues that increased use of data can enable individually tailored solutions which free the abilities of individuals and enable individual development and performance beyond the previously prevailing uniformity that characterized Swedish work life. Something that can also be seen as a sign of individualization is the increase in self-employed people, small businesses and freelancers. Today, there are just over a million companies in Sweden, of which approximately three-quarters are single-individual enterprises ([Ekonomifakta, 2022](#)). An increasing number of people choose to start their own companies and in the first nine months of 2021, the number of newly started companies increased by 8 percent compared to the previous year (the Swedish Companies Registration Office/Bolagsverket, statistics compiled by [Visma, 2021](#)). Freelancing has also increased, which may indicate a desire for flexibility and greater autonomy in the work life. Most freelancers are in the 26-40 age group, but it is among the younger, 18-25 year-olds, that the percentage increase is the greatest. Compared to 2020, freelancing in the younger age group increased by 37 percent in 2021 ([IT-karriär, 2021](#)).

4. Globalization

A megatrend that greatly affects work life and its development is globalization. In recent decades, globalization has progressed at a rapid pace. Technological developments that improve global transactions, trade liberalizations and more global corporate structures have created the conditions for globalization. In Sweden, there are around 725,000 jobs that depend on exports to countries outside the EU, directly or indirectly. The proportion of highly educated workers in export-dependent jobs is increasing. ([Europaparlamentet, 2019](#)). At the same time, globalization leads to reduced demand for certain less highly qualified jobs in Sweden, as global production patterns change and jobs move abroad, according to a [report](#) from the Swedish Center for Business and Policy Studies (2018).

The normalization of working completely or partially remotely also changes the conditions for companies to hire workers from all over the world. "Work from anywhere" policies and distributed teams at more and more companies create the conditions for a more globalized work life for both companies and individual employees. Remote work also means that the war for talent intensifies. Companies can start from a global talent pool in their recruitment, but still fight in a global competition for the best skills. ([LinkedIn, 2022](#)).

Declining Globalization

The pace of globalization has, however, slowed somewhat in recent years, which the term "slowbalization" alludes to ([Swedish Agency for Growth Analysis 2021](#)). A likely explanation is increased risk awareness as a result of global factors such as a pandemic, conflicts and economic uncertainties, which in turn affect the global supply chains. The exiting of trade agreements and unions, such as Brexit, show a more protectionist reason for the stalled globalization. Stagflation anxiety (stagflation is a term used to describe a situation where high inflation, low growth and high unemployment prevail at the same time) can also lead to security seeking and low risk appetite, which affects consumption and also the mobility of work life.

5. Servitization

Servitization as a concept aims to turn a product or item into a service or to add a service to the product, for example subscription and home delivery of food products from a grocery store. In a society where we partly want to be able to tailor our consumption and our experiences, and partly seek new ways to solve problems, space is created for new services.

"What can be servitized will be servitized and the sharing economy will only grow. Individuals will decide and needs will rule. Individuals always feel that companies lag behind in solving their needs. A need today is not the same need tomorrow. Services linked to AI and automation are also emerging in order to better and more easily understand tomorrow's needs with the help of data."

– Magnus Löfsjögård

In Sweden, 80 percent of all new companies are service companies, nine out of ten new jobs in the last decade have been created in the service sector, and three out of four Swedes today work in some form of service production ([Almega, 2022](#)). It has become increasingly common for companies to servitize solutions for their customers to meet their needs and solve their challenges. According to the report [The Services Revolution](#) from Business Sweden (2018), the creation of services in Sweden as well as internationally has increased for a long time. A prerequisite for a continued increase in the service sector and service exports is that the demand for labor and skills is met in an increasingly global labor market where the war for talent is fierce.

The success of servitization can be understood based on the above-mentioned trends of flexibility, individualization and globalization – as well as, of course, the ongoing technological development. Individualization creates demand for things that are tailored and individually adapted. A more flexible and globalized work life where we may no longer work from a common workplace or keep an office creates a need for new places to work. One solution is to servitize the product "workplace" and offer employees a workplace

as-a-service, for example by subscribing to membership for access to various co-working spaces and office spaces. When the home has become a common place for work, it is also reasonable to assume that new needs for service connected to the home arise.

Changed need for competence

One effect of the above-mentioned trends is that the demand for skills is changing. According to the Swedish Public Employment Service, tasks that require social and technical skills will be in greater demand in the future. For example, individual employees are expected to have greater self-leadership, more customer contact and carry out more planning in the coming year. Tasks that require simpler cognitive skills, for example administrative work, will instead decrease as they will more or less be replaced by digital systems. ([Arbetsförmedlingen, 2022](#)). An example of a growing knowledge-intensive part of the labor market is the service sector, including SaaS companies (Software as-a-service) and Research and Development. The platform economy and the use of digital platforms together with service offerings have and will continue to fundamentally change many industries, but also the need for new skills. ([the Federation of Swedish Innovation Companies 2022](#)).

The increasing remote and hybrid work also affects which skills are in demand. Leadership skills are central. In Sodexo's Novus surveys on the future of work life (see the reports [New demands on employers when the fight for talent intensifies](#), [Less time at work, more time for work](#) and [Anarchy or micromanagement](#)) "better leadership" ranks high in the question of what would make the work situation better. It is also a strong driving force behind the desire to change jobs. Previous reports from Sodexo also show that managers are expected to take a more coaching and supporting function rather than a controlling one.

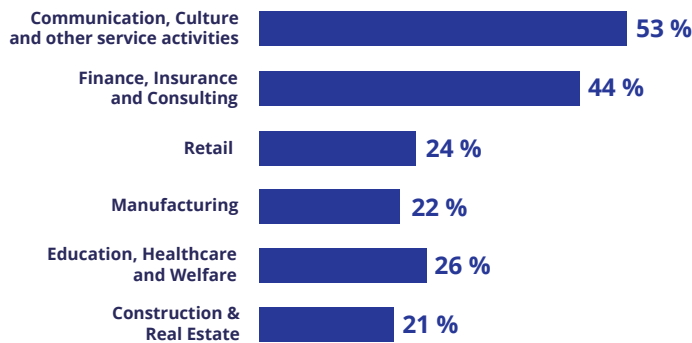
In the report [The work life of the future - the location conditions and labor market system of the thinking society](#) (2018) Kairos Future highlights technical ability, social ability and self-leadership as three clusters of abilities that will have greater importance in the work life of the future, regardless of industry. The fact that the work is increasingly project-based in flexible teams and networks also places demands on the ability to collaborate and adapt quickly. This is precisely why TRR Trygghetsrådet lists soft skills such as problem solving, collaboration, flexibility, creativity and critical thinking as particularly attractive in the future work life where cognitively demanding professions will increase ([TRR Trygghetsrådet, 2022](#)).

Summary of Sodexo's previous reports on the new work life

In December 2020, Sodexo published the first report on the paradigm shift in work life we saw coming as a result of the forced remote work during the corona pandemic. Since then, we have published another five reports on the same theme, all of which form the basis of this seventh and final report in the series. Below is a summary of the most important findings and conclusions from our previous reports on the new work life.

[The new normal – work life beyond the pandemic \(December 2020\)](#)

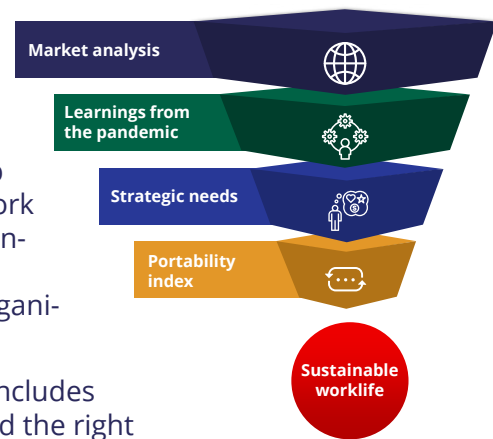
In the fall of 2020, Sodexo commissioned market research company Kantar Sifo to ask 700 Swedish companies and organizations with more than 50 employees about work life after the pandemic. Based on the survey, we developed a portability index, which indicates the conditions for remote work in different industries. The result shows that portability – the share of the workforce that can work remotely – varies between sectors.



Approximately 31 percent of the total workforce reported to have tasks that could be carried out remotely.

Why every company leadership needs a work life strategy (May 2021)

Based on the thesis that the corona pandemic has accelerated and normalized the paradigm shift that was already in the starting pits thanks to digitization and technological development, as well as conclusions from the previously developed portability index, we recommended that all company managements develop a work life strategy that includes how the company's work should be organized after the pandemic. We also presented an analysis model in four steps to get help in policy work, in order to create a better picture of your own organization's conditions.



The report also concluded that a sustainable work life includes collaboration between culture, functioning flexibility and the right work tools.

5 problems with the hybrid model - and advice how to meet them (July 2021)

During the first two years of the pandemic, a number of challenges were exposed for both employers and employees as a result of the increase in remote and hybrid work. At the same time, we were able to establish that hybrid work was what most people expected even after the pandemic. In this report, Sodexo highlighted five common challenges with hybrid work:



To take part in Sodexo's advice in addressing these challenges, read [the report](#).

Novus survey: Employees' Views on Work Life

On behalf of Sodexo, Novus has carried out a series of surveys among professionals in the private and public sector in Sweden. The aim was, among other things, to find out to what extent employees work and plan to work remotely during and after the pandemic restrictions, what workplaces have guidelines for remote work and whether employees are considering changing jobs. Some of the questions in the surveys have been recurring in order to discern if and how the trends are moving. The measurements have been made in four stages: August 2021, October 2021, March 2022, and October 2022. Each survey has resulted in a report from Sodexo. In the reports, the results of the survey have been presented and analyzed, and Sodexo has provided advice and recommendations to employers and managers on how they can best meet the expectations and conditions in the new work life.

Below is a summary of the three reports that Sodexo has previously published based on the Novus surveys in the series Employees' view of work life – then, now and in the future. The fourth report, which is based on Novus's survey from October 2022 and also covers the participants' thoughts about work life in 2030, is the last in the series and the one you are currently reading.

Anarchy or micromanagement – work life when offices open up again (September 2021)

The results of Novus' August 2021 survey showed that four in ten professional employees worked almost exclusively from home or remotely during the pandemic, and that more than half planned to continue doing so at least one day a week. Nearly three out of four were satisfied with the flexibility their employer gave them during the pandemic in regards to where the work is done, but 15 percent of employees felt that they are not allowed to work as flexibly as they would like. Five percent also stated that they would consider changing jobs if they were not allowed to work as flexibly as they wished. The importance of flexibility is also shown in the fact that the employees thought that the opportunity for flexible work is as important as having a good manager to maintain good working conditions.

The survey also shows a clear picture of the workplace's most important function – to meet and collaborate. This is in line with the fact that the most positive thing about coming back to the office is said to be meeting colleagues. The respondents considered the most negative thing to be once again spending time on work trips and commuting and a deteriorated work-life balance.

Based on the results of this first survey by Novus, Sodexo made a number of recommendations to managers and employers:

- Allow the adjustment to the new work life post-pandemic take the time it needs
- Focus on getting employees to thrive and perform as well as possible
- Show clear leadership, but be responsive to employee needs
- Show willingness to work toward better ways of working rather than falling back to the old and poorly functioning one
- Offer more flexible work – it will likely become more important in order to be an attractive employer

Less time at work, more time to work – why productivity increases when working remotely (December 2021)

Novus' second survey was conducted in October 2021 and showed that 54 percent of professionals were still partially working remotely, even though the official recommendations to work from home were no longer in place. Almost one in two of those who worked remotely reported saving more than an hour a day. One in three used that time to work more, and one in two used it for household chores. The saved time was also used to sleep longer and exercise more. Of those who worked remotely, one in two stated that they got more work done than when they were in the office, four out of ten worked as much, and only eleven percent worked less.

All in all, there are many indications that remote work is positive for both employees and employers. In addition to the fact that a large proportion of employees stated that they worked more at home, we know that good health as a result of recovery and exercise generates more energy to work. At the same time, employees felt that they had more time in their everyday lives. But this does not mean that remote work is the best option for everyone in the organization or the best choice for all tasks. Sodexo therefore recommended that managers and employers give employees ample opportunity to steer their own work for increased productivity.

New demands on employers when the fight for talent intensifies – a report about the needs and motivational factors of employees in the new work life (June 2022)

Novus' survey in March 2022 showed that nearly one in three professionals considered changing jobs. The main reasons given were to get a higher salary, that motivation was lacking or the tasks were not interesting enough, and that the leadership or the immediate manager were not good. One in three employees also stated that they would consider quitting if the employer required 100 percent attendance at the office, and one in ten would definitely quit in such a scenario.

Based on this, it could be concluded that purpose and values but also the opportunity to work flexibly are important for employees when choosing an employer. The fact that so many were thinking about changing jobs also indicated that we were facing a wave of redundancies in Sweden. To retain and attract talent, Sodexo presented four pieces of advice to managers and employers:

- Facilitate social exchange – let the office become a mothership
- Offer conditions for autonomy and flexibility
- Create space for skill sharing and inspiration
- Work with adaptable solutions to be able to reshape premises and office contracts according to changing needs

Results

Employees' views on work life then and now

Novus's fourth and final survey of professional employees' view of work life in October 2022 contains a number of interesting differences from the previous comparable surveys, while at the same time a stabilization of work life can be discerned.

The corona pandemic from the rearview mirror

At the time of this study, the restrictions of the corona pandemic had loosened its grip on the Swedish labor market, and when employees look back on recent years, 34 percent state that work life was slightly or much better during the pandemic. However, some subgroups are more satisfied than others. Four out of ten professional employees living in big cities and municipalities close to big cities, as well as six out of ten who almost exclusively worked at home or remotely, stated that work life has been better during the pandemic.

At the same time, 39 percent stated that work life was slightly or a lot worse during the pandemic. Among those who were less satisfied, certain subgroups are in turn overrepresented. Every second employee who only worked in the office stated that work life was worse. The same applies to 55 percent of those working in education and 51 percent of professionals in healthcare.

Four out of ten feel that work life has been worse during the pandemic

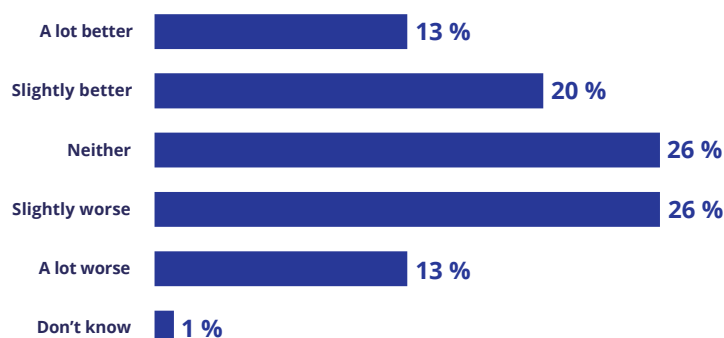


Figure 1: Answer to the question "Do you generally think that work life has been better or worse during the corona pandemic?" BASE: All October 2022 (n=1091), March 2022 (n=1011), October 2021 (n=1006), August 2021 (n=1043)

Significant differences

The following subgroups to a higher degree respond:

A lot + slightly better (34 %)

- Residents in: Cities and greater metropolitan areas (40 %)
- Worked during the pandemic: Full-time or nearly full-time from home/remotely (61 %)
- Work within: public administration (42 %)

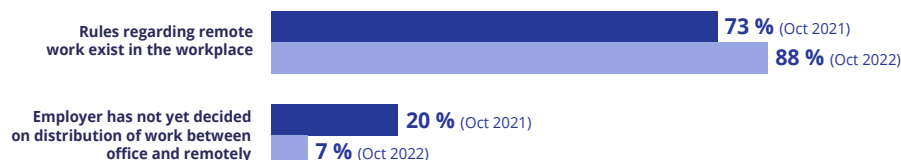
A little + a lot worse (39 %)

- Worked during the pandemic: From home/remotely 25 % (52 %), Not at all from home/remotely, only from the office (49 %)
- Work within: Education (55 %), Healthcare/Welfare (51 %)

The to be or not to be of the office post pandemic

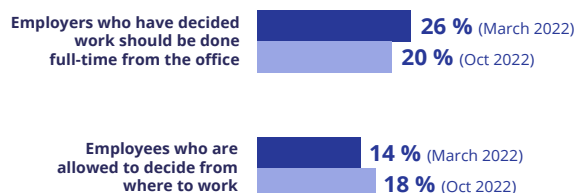
Almost every other employee (46 percent) stated, in October 2022, that they planned to work 100 percent in the shared workplace in the coming months, even though the restrictions recommending remote work have been gone for several months. At the same time, only three percent plan to work entirely remotely or at home. In other words, we can state that hybrid work, where employees divide their time between the joint workplace and above all the home, has established itself as the new norm.

In October 2021, 73 percent of professionals stated that there were regulations regarding remote work in the workplace. A year later, that figure is significantly higher – a whopping 88 percent. In October last year, 20 percent of respondents also stated that the employer had not yet made a decision about how the distribution between work in the office and remotely would look in the future. In the survey from October 2022, only 7 percent state this.



Another interesting comparative figure is that the percentage of professionals who state that the employer has decided that the employees will perform their work full-time in the office has fallen from 26 percent in March 2022 to 20 percent in October. The proportion of employees who are allowed to decide from where they work has also increased, from 14 percent in March to 18 percent in October. This indicates that many employers have realized that flexibility is important to retain and attract new employees – something we were able to show in Sodexo’s latest report [New demands on employers when the fight for talent intensifies](#) - and have adapted accordingly.

But flexibility is not distributed equally among the employees. Among the workers who state that the employer has decided that they will work full-time in the office, some subgroups are over-represented. These are professionals with a personal income of SEK 30,000-39,999 a month (26 percent), who live in smaller or rural towns, urban areas and municipalities (26 percent), work in education (51 percent) or health care and welfare (31 percent), feel that work life was much worse during the pandemic (33 percent) and only worked from the office (41 percent). Some of the subgroups that are offered less flexibility than others also have a more negative view of work life in 2030, which we will return to later in the report. What we can conclude is that flexibility risks becoming a benefit for more privileged groups of professionals, thereby reinforcing existing divides within the workforce.



The most important function of the joint workplace continues to be the social exchange for both planned and unplanned meetings. Six out of ten of the respondents state this. Fewer and fewer believe that the office has a central role as a digital hub where there are conditions for creating good meetings for employees and stakeholders who are located elsewhere. While 22 percent of officials thought it was one of the most important functions of the office in October 2021, only 16 percent did so a year later. A possible explanation could be that workplaces have not yet found the technical solutions required to make hybrid meetings, where some sit in the same room and others do not, work seamlessly – and that employees have therefore started to tire of them.

Subgroups who to a larger extent than the total (20%) stated that the employer has decided they should work full time from the office:

- Personal income of SEK 30,000-39,999 a month (26 %)
- Live in smaller or rural towns, urban areas and municipalities (26 %)
- Work in education (51 %)
- Work in healthcare and welfare (31 %)
- Feel that work life was much worse during the pandemic (33 %)
- Only worked from the office during the pandemic (41 %)

Missing wave of resignations?

The fact that every third employee in Novus' survey in March earlier this year stated that they were thinking about changing jobs led us to ask ourselves whether we were facing a wave of resignations in Sweden. Based on the survey carried out in October, we can state that that figure has fallen, now one in four say they are thinking about changing jobs. The change could be an effect of the recession, something that has previously been shown to make employees less likely to change jobs. Another reason could be that those who were considering changing jobs did so since the survey in March. Another possible explanation is that ways of working have stabilized after the pandemic, and that the employees are satisfied with the outcome. As previously noted, fewer employers for example require full attendance at the office now compared to last spring, which we know is appreciated by the employees.

One in four state that better leadership would improve their work situation

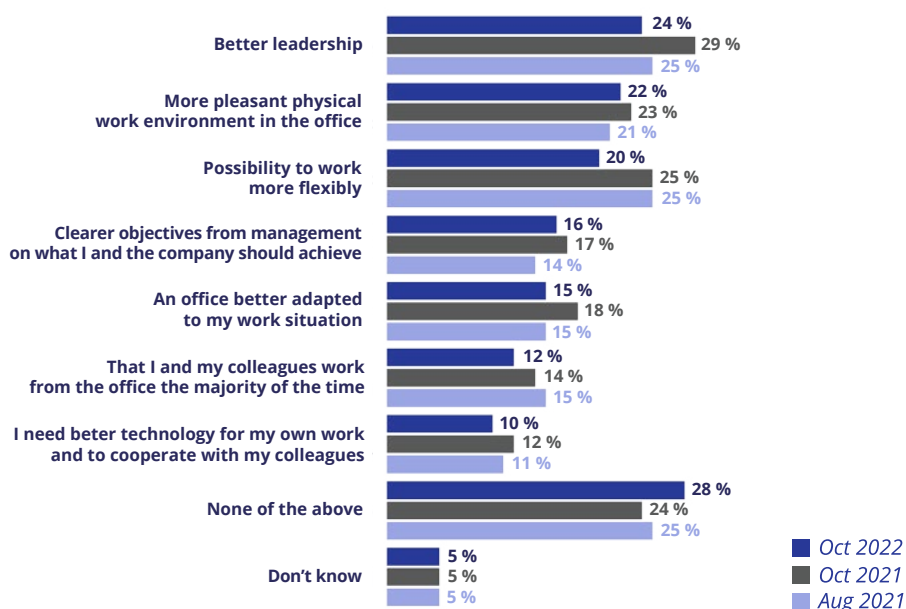


Figure 2: Answer to the question "Would any of the following improve your work situation?". Multiple responses allowed. BASE: All October 2022 (n=1091), March 2022 (n=1011), October 2021 (n=1006), August 2021 (n=1043)

Just as in August and October 2021, in October 2022 we asked professionals if any of a number of defined factors would make their work situation better. At the top, now as then, were better leadership, a more pleasant physical work environment in the office and the opportunity to work more flexibly. But some significant differences can be discerned in employees' answers between the different periods. Now 24 percent state that better leadership would make their work situation better, compared to 29 percent in October last year. There are also fewer who now claim that they would enjoy work more if they had the opportunity to work more flexibly (20 percent compared to 25 percent in October last year). In other words, employees are more satisfied with the leadership and their opportunities to work flexibly now compared to the same period last year. A reasonable conclusion to draw is that this is also based on the fact that the percentage of employers who request that their employees work full-time in the office has fallen.



Employees are more satisfied with the leadership and their opportunities to work flexibly now compared to the same period last year

Professionals' views on work life 2030

In October 2022, we also asked employees what they believe and hope work life will look like from now until 2030 in their own industry. Based on the answers, the image of an individualized, flexible and developing work life emerges.

Optimism among many – but gaps become visible

Overall, respondents see the future brightly. Four out of ten believe that work life within their own industry will develop for the better until 2030, while a sixth believe that it will get worse. But some subgroups are more positive and negative than others. Those who earn SEK 50,000 a month or more, work in manufacturing and industry in the private sector, have worked a lot from home or remotely during the pandemic, and think that work life was also better then, to a higher extent respond that they think work life will improve by 2030.

A gloomier view of the future can be discerned among those who work in education, care and welfare, those who believe that work life was worse during the pandemic, and those who are thinking about changing jobs. Those working in health care and welfare are the most pessimistic, with as many as 28 percent believing that work life will get worse by 2030. This is also a professional group that has had an admittedly tough time during the pandemic, has had worse conditions for working flexibly during the period, and whose employers have decided that they will work full-time in the office in the future.

One reflection is that the subgroups who have thrived to a greater extent believe that work life will also improve until 2030, while those who have had a worse time do not have such a bright view of the future. Similar tendencies can be discerned when we ask professionals what they think work life in 2030 will entail more specifically.

Four out of ten believe that work life within their own industry will develop for the better until 2030

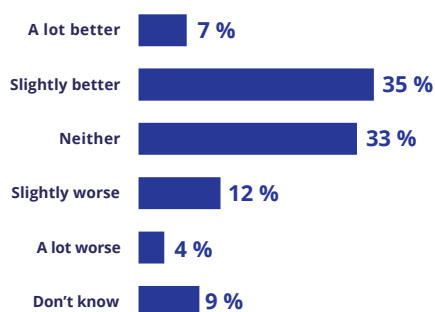


Figure 3: Answer to the question "How do you think work life for individuals in your industry will develop until 2030?"
BASE: All October 2022 (n=1091)

Significant differences to the total

The following subgroups to a higher degree respond:

A lot + Slightly better (42 %)

- Employed within: Private sector (48 %)
- Personal income: SEK 50,000 - SEK 59,999/month (49%), SEK 60,000/month or more (57%)
- Worked during the pandemic: full-time or nearly full-time from home/remotely (50 %)
- Work life has been better during the pandemic (48 %)
- Work in: Manufacturing (54 %)

Slightly + Much worse (16 %)

- Work life has been worse during the pandemic (22 %)
- Work in: Education (26%), Care (28 %)
- Thinking about changing jobs: Net: Yes (22 %)

From the crystal ball: a flexible and individualized work life with many possibilities

A striking majority (76 percent) of professionals believe that hybrid work will be the main way of working in 2030. Only four percent believe that we will only work from a shared workplace/physical office and a mere one percent believe that work will be carried out full-time remotely from home, cafes or the like. Four percent believe that work will mostly be carried out remotely from shared offices such as coworking spaces.

A majority believe that hybrid work will be the main way of working in 2030

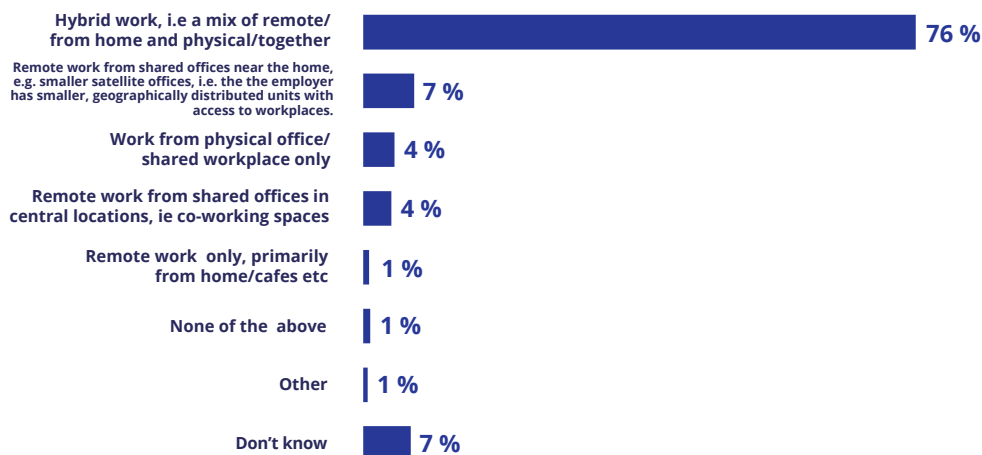


Figure 4: Answers to the question "What type of workplace do you think we will mostly be working from around the year 2030?". BASE: All October 2022 (n=1091)

65 percent of employees believe that work life in 2030 will mean greater opportunities to influence when you work and 51 percent believe in greater opportunities to influence how much or how little you work. 56 percent believe that they will have greater opportunities to influence their own work and their job role, and 62 percent believe in greater opportunities to develop and broaden their skills. Four out of ten also believe that there will be more jobs and job opportunities, while only two out of ten believe that there will be fewer. Overall, the answers paint a bright picture of work life in 2030, where professionals have a great deal of personal influence over their work, flexibility and development opportunities.



Most believe that work life in 2030 will mean greater opportunities to influence when and how much they work, their own work and their job role

But when it comes to employees' belief in the degree to which they themselves will be able to influence when they work, there are similar differences between the subgroups as when asked how brightly they see work life in 2030. The employees with the strongest belief that they themselves can influence their working hours are in the private sector (69 percent), those with an income of SEK 50,000–59,999 a month (74 percent), those who think that work life was better during the pandemic (71 percent), and those who then also worked full-time or almost full-time remotely (76 percent). In total, nine percent of professionals believe that they will have less opportunity to influence when they work, and there is an overrepresentation of people who work in education (14 percent) and healthcare and welfare (15 percent). Once again, we can see that those who are already well off have a brighter view of the flexibility that work life in 2030 will offer, while those who have had a tough time in recent years are more negative.

Different pairs of opposites for how professionals think work life will develop until the year 2030

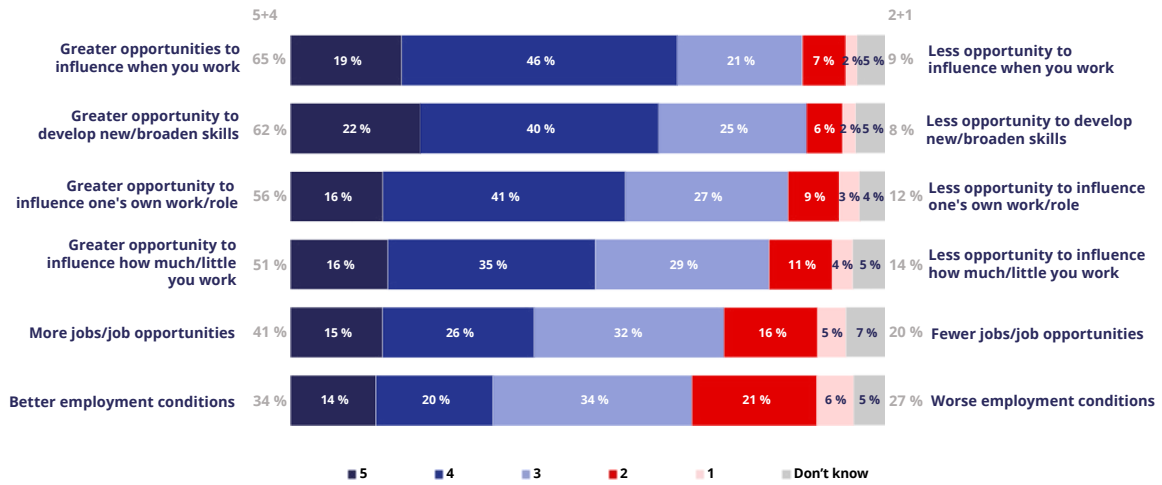


Figure 5: Answers to the question "Please mark how you think work life for professionals will develop until the year 2030." BASE: All October 2022 (n=1091)

The following subgroups to a higher degree respond:

Greater opportunity to influence when to work. Positive 5 + 4 (65 %)

- Employed in: Private sector (69 %)
- Personal income: SEK 50,000 - SEK 59,999/month (74 %)
- Worked during the pandemic: Full-time from home/remotely, nearly full-time from home/remotely (76 %)
- Work life has been better during the pandemic (71 %)

Less opportunity to influence when to work. Negative 2 + 1 (9 %)

- Work in: Education (14 %), Healthcare/Welfare (15 %)

Greater opportunity to develop new/broaden skills. Positive 5 + 4 (62 %)

- Female 30-49 years (68 %)
- Personal income: SEK 60,000/month or more (69 %)
- Worked during the pandemic: Full-time from home/remotely, nearly full-time from home/remotely (67 %)

Less opportunity to develop new skills/broaden one's skills. Negative 2 + 1 (8 %)

- Work in: Education (15 %), Healthcare/Welfare (15 %)

Greater opportunity to influence one's own work/role. Positive 5 + 4 (56 %)

- Employed in: Private sector (62 %)
- Personal income: 50,000 – SEK 59,999/month (67 %), SEK 60,000/month or more (65 %)
- Worked during the pandemic: Full-time from home/remotely, nearly full-time from home/remotely (63 %)
- Work life has been better during the pandemic (62 %)

Less opportunity to influence one's own work/role. Negative 2 + 1 (12 %)

- Work in: Education (20 %)
- Thinking about changing jobs: Net: Yes (15 %)

An ideal work life: freedom, independence and community

In Novus' survey in October 2022, in addition to asking professionals what they think about work life in 2030, we also found out what they want it to look like within their own industry. At the top of the wish list is a shorter work week, 47 percent of professionals want this. This is followed by more flexible work hours (40 percent), being able to choose to work from anywhere globally (36 percent), and that technology development and automation have created new jobs and professions (27 percent). One in four also wishes for more contact and collaboration with colleagues and greater independence at work.

One in two connects a shorter work week with an ideal work life in 2030

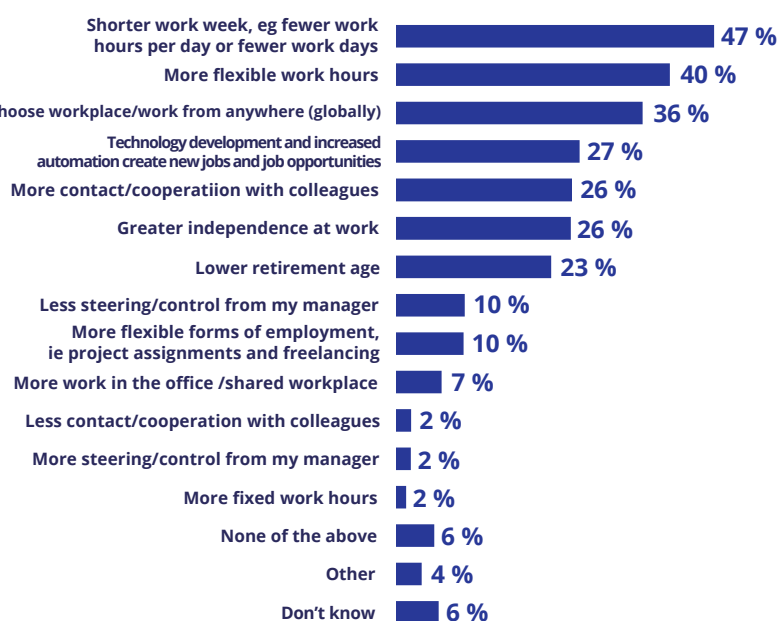


Figure 6: Answer to the question "what does an ideal work life for individuals in your industry look like in 2030?"
Multiple answers possible. BASE: All October 2022 (n=1091)

The dream of a shorter work week and more flexible work hours

When asked if professionals would be positive or negative about a shorter work week, 76 percent respond positively and seven percent negatively. A significant difference to the total is that men, above all aged 50-64 and people with an income of SEK 60,000 a month or more, are more negatively disposed to a shorter work week. More positive responses came from women, aged 30-49 and 50-64 years, people with an income of SEK 30,000-39,999 a month, those who worked full-time or almost exclusively from home or remotely during the pandemic and who also thought that work life then was better.

A reasonable conclusion to draw from this is that those who more often do more work at home in the form of household chores and taking care of small children, to a greater extent than others feel that a shorter work week would make everyday life easier. In one of Sodexo's previous reports, it also appears that half of those who worked remotely during the pandemic spent the time they saved on commuting on household chores. In the survey conducted in October 2022, 74 percent are positively disposed to more flexible working hours, while only five percent are negatively disposed to the same.

The majority believes that a shorter work week for professionals in 2030 would be positive

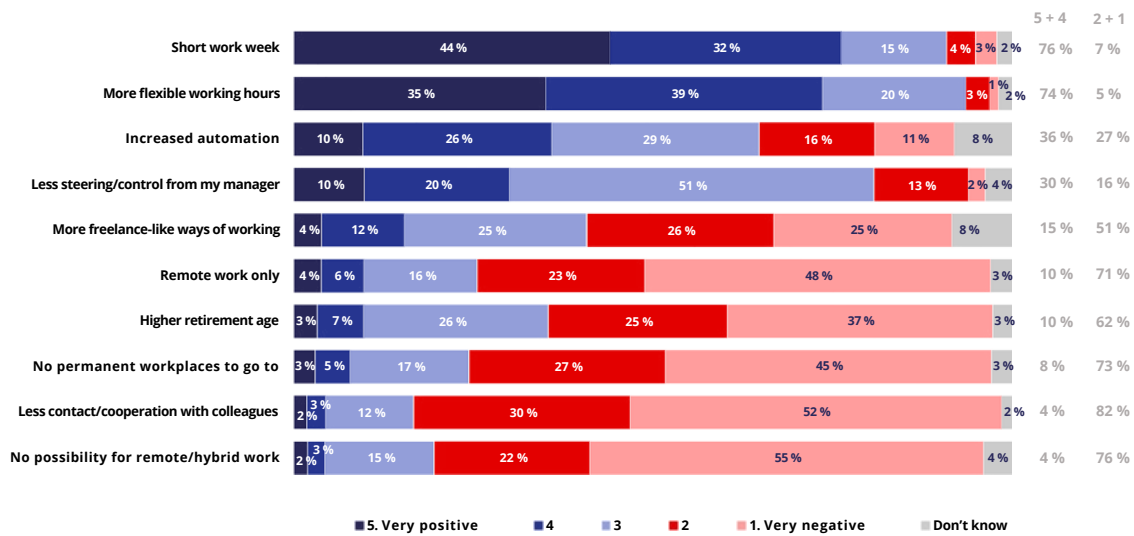


Figure 7: Answers to the question "If you imagine the work life of professionals around the year 2030, would the following be positive or negative in your opinion?". BASE: All October 2022 (n=1091)

The following subgroups to a higher degree respond:

Shorter work week. Positive 5 + 4 (76 %)

- Female (83 %)
- Age: 30-49 years (81 %)
- Female 30-49 years (88 %)
- Female 50-64 years (81 %)
- Personal income: SEK 30,000 – 39,999/month (82 %)
- Worked during the pandemic: Full-time from home/remotely, nearly full-time from home/remotely (80 %)
- Work life has been better during the pandemic (80 %)

Negative 2 + 1 (7 %)

- Male (11 %)
- Male 50-64 years (13 %)
- Personal income: SEK 60,000/month or more (13 %)
- Worked during the pandemic: From home/remotely 25% (13 %)
- Works in: Public administration (11 %)

More flexible working hours.

Positive 5 + 4 (74 %)

- Worked during the pandemic: Full-time from home/remotely, nearly full-time from home/remotely (81 %)
- Work life has been better during the pandemic (84 %)

Negative 2 + 1 (5 %)

- Works in: Education (8 %)

Increased automation Positive 5 + 4 (36 %)

- Male (41 %)
- Age: 30-49 years (42 %)
- Male 30-49 years (45 %)
- Employed in: Private sector (43 %)
- Personal income: SEK 50,000 - SEK 59,999/month (43 %), SEK 60,000/month or more (53 %)
- Work life has been better during the pandemic (43 %)
- Works in: Manufacturing/Industry (45 %)

Negative 2 + 1 (27 %)

- Female 50-64 years (32 %)
- Employed in: Public sector (32 %)
- Living in: Cities and greater metropolitan areas (32 %)
- Work life has been worse during the pandemic (32 %)
- Works in: Education (45 %), Healthcare/Welfare (37 %)

Hybrid work on a global labor market – but offices and colleagues still have a part to play

The employees rate the possibility of being able to work from any place on earth highly, and just over one in three connects it with an ideal work life in 2030. Three out of four say that not having the possibility to work remotely in 2030 would be negative, and only four percent say it would be positive. But that employees should wish to work as satellites in a global market without meeting any colleagues or having a workplace to go to is far from true. Only one in ten believes that it would be positive to only work remotely in 2030, while seven in ten believe that it would be negative. 73 percent also state that it would be negative to not have a permanent workplace to go to, something that would be appreciated by only eight percent of professionals. A conclusion to be drawn from this is that employees appreciate hybrid work, but also want to have the opportunity to choose

for themselves whether to work from an office or remotely, either from home or from another part of the world. It is important that all options are available, and equally important that they themselves can choose what suits them best.



Employees rank the possibility of remote work highly, but want the option of working from a shared workplace.

The survey also shows that colleagues remain important. One in four connects more contact and cooperation with their colleagues to an ideal work life in 2030, and additionally, a full 82 percent of professionals believe that it would be negative for them to have less contact and cooperation with colleagues in the coming years. Only four percent state that it would be positive.

Opportunity for leadership and technology development

Professionals dream of and believe in a work life with flexible working hours where they are given great independence and the opportunity to develop and broaden their skills, but few are keen on freelance-like forms of work. Every second employee believes that it would be negative for them to work like this in 2030, and only 15 percent believe that it would be positive. One in two is also neutral about less direction and control from their manager, although more are positive (30 percent) than negative (16 percent) about it.

For just over one in four professionals (27 percent), an ideal work life in 2030 consists of new professional opportunities created by technological development and automation. This suggests that automation is seen as something that can open new exciting doors and make work easier, rather than as a threat and job thief. However, a somewhat divided view emerges in the answers to the question whether increased automation in work life in 2030 would be positive or negative for professionals. 36 percent think it would be positive, 27 percent negative, 29 percent say they are neutral and eight percent say they don't know. Overall, there is a predominance of positivity regarding increased automation, although there is some skepticism and uncertainty about what it would mean for work life in 2030.

Conclusion: the way forward

Based on the results of Novus' survey in October 2022 on what professionals believe and hope that work life will look like in 2030, and in light of the five work life trends we have defined as particularly setting the tone for development, a number of conclusions can be drawn. These conclusions support managers and employers in meeting employee expectations and hopes about work life in 2030, in turn central to retaining and attracting talent. In this section, as in the introduction, we have highlighted valuable perspectives and insights from Magnus Löfsjögård, responsible for Digital Innovation in Sweden at Sodexo and responsible for Sodexo's accelerator program Sparx in Europe.

The individual in focus

There is a strong individualization trend, which is connected to both servitization, flexibility and globalization. Professionals have big expectations on being able to influence when and where they work, and a strong belief that work life in 2030 means greater opportunities for them to develop their skills and influence their own tasks. But despite the increase in the number of freelancers and self-employed people in recent years, professionals have a negative attitude towards more freelance forms of work according to the Novus survey in October 2022. It would appear that employees do not see any opposition between gaining more power over their work situation and being employed. Magnus Löfsjögård puts it well:



*We want the security of being employed,
but the freedom of being self-employed*

One possible explanation for the low interest in freelance-like forms of work is the troubled times and the economic situation we find ourselves in in the fall of 2022 – in line with fewer respondents now thinking about changing jobs.

For employers and managers, it is becoming more important to see and take advantage of each individual's potential and driving forces. The employees want to develop, control their own work and feel that it is meaningful. Therefore, they need to be seen and treated as individuals with different strengths, needs, challenges and functions in a group and company culture. Dedicating time and energy on understanding how employees work individually and in groups will quickly pay off. Giving each individual the best conditions to perform and thrive creates a good work environment with committed employees.

In light of individualization and hybrid work being and most likely remaining the dominant way of working, managers should assume a less steering and controlling function, and instead increasingly take a coaching role. Acting as a sounding board and helping the individual to develop creates committed employees with a strong sense of personal responsibility for the work. When asked if and how the role of leadership will change in the coming years, Magnus Löfsjögård answers:

"It will definitely change and it would need to change now, very much connected to how to manage remote work. Clarity towards employees becomes crucial, what the business goals are and what the company must do to get there. The notion of control and what it means for a manager needs to be redefined, is it about monitoring employee facetime in the office or making sure that employees deliver, that the team works and that the work is done?"

The development of leadership is also in line with the trend regarding which competencies are requested from employees: self leadership, social skills and technical ability.

Democratizing flexibility

In the introduction and in Sodexo's previous reports, we have highlighted the risk of creating an A-team and a B-team as hybrid work spreads. Employees who are more often seen in the office may receive advantages and development opportunities that do not benefit their colleagues who work more often remotely. Novus' survey in October 2022 shows another gap linked to flexibility at risk of emerging among professionals. Those who think that work life was worse during the pandemic, who work in education, healthcare and welfare, have a gloomier view of work life in 2030 than professionals in other sectors. Common to that group is also that they, in general, have had fewer opportunities to work flexibly than other professionals in recent years. The degree of flexibility in work life would appear to be one of the things that are important for professionals to thrive and have a positive view of work life in 2030.



The degree of flexibility seems to be of fundamental importance for whether professionals thrive at work and how brightly they view work life 2030

It is possible to create better conditions for flexibility also for professional groups that traditionally have not been able to work remotely, such as jobs in education, healthcare and welfare. A majority of the work tasks may still need to be carried out in a shared workplace, but instead of habitually letting all the tasks be carried out at the workplace, there is great value in identifying the work that can in fact be carried out remotely, to give employees as much flexibility as possible. Flexibility in work life is about more than the possibility of working remotely, it is also to a large extent about the possibility to control one's own working hours in order to free up time that helps everyday life work. Giving employees whose work requires physical presence greater opportunity to influence their own schedule is therefore a good way to ensure that they too are offered flexibility and self-determination, which is so important for the wellbeing and commitment in the individualized work life.

Maximize the workplace

The globalization trend is apparent when professionals are allowed to dream about work life in 2030. One third wants to be able to work from any place on earth. But it is the possibility of choice that is important, the physical workplace must still be there when, above all, the need to socialize with colleagues arises.

"When it comes to the office, it has suddenly begun to compete with the home or other places to work. To attract people to the office as a location, it must be more fun and better than the alternatives. The office must fulfill a function in the hybrid world in which more and more people work, and it is becoming increasingly apparent that the function is to socialize as well as softer values, rather than to perform the daily job."

– Magnus Löfsjögård

That said, the Novus survey from October 2022 shows tendencies that employees are tired of hybrid meetings, where some are in the room and some are remote. But hybrid meeting fatigue is unlikely to get people back to the office. Instead, Magnus Löfsjögård sees great potential for the new technology that is establishing itself in the area, which can create a simulation of all meeting participants being in the same room, even though only half actually are. The technical solutions can give a real facelift to hybrid meetings and, in addition, further consolidate the flexible and hybrid way of working as the new norm:

"Connected to the new, more flexible work life, there is a lot of development in VR (virtual reality), XR (extended reality) and AR (augmented reality). There is a greater need for new shared and location-independent spaces and simulations as a complement to physical reality and there is certainly a lot happening on the technology front. We are not there yet, but within a few years I think the use of virtual rooms and completely digital solutions will be more common."

Increased automation and technological development are predominantly seen as positive by professionals. As more administrative and standardized work tasks can be automated, time for development work that requires the competence of the individual increases.

In the service of the new work life

There are reasons to believe that the ongoing servitization will gain further strength based on what the professionals believe and want from work life in 2030. The expectation of having access to a shared workplace and at the same time working a lot remotely puts new demands on flexible contracts for offices and associated services. For Sodexo, which operates in facility management, the fluctuating need for service in the workplace, combined with automation, has already led to the emergence of new services adapted to the new work life:

"Many of our customers have adopted a hybrid model, which means much lower occupancy in the office but also less regular occupancy. What we do then is look at more distributed forms and solutions, which follow a fluctuating population. As it becomes more difficult to plan in advance, more on-demand and need-based services are needed. Tech and data to better understand behavior, traffic and occupancy create better possibilities to work in need-based ways."

– Magnus Löfsjögård



The expectation of having access to a shared workplace and at the same time working a lot remotely puts new demands on flexible contracts for offices and associated services.

Services that have previously been standardized and linked to the shared workplace will likely be individualized and reach employees where they are, either at home or at a third workplace offered as a service in itself. What used to be a workplace service will instead become a work life service, and highly useful for employers and companies to be able to take into account the employees' individual conditions and needs. Taking advantage of tailored on-demand services is an effective way to meet employees' expectations of an individually tailored and flexible work life, while at the same time creating new job opportunities.

Opportunities to build back better

By all accounts, work life in 2030 will be characterized by remote work, individualization, globalization, a drive for purpose and values, and servitization. For companies' resilience and for employers' ability to retain and attract new talent, it is central to be aware of, manage, and take advantage of the strong trends. Customers and employees alike expect individually adapted and technical on-demand solutions, to be able to operate and work in a global market, and that companies are serious about sustainability. Remote work, which struck like lightning during the corona pandemic, is here to stay. Employees have experienced the benefits of being able to decide where they do their work, and are not prepared to give up that freedom.

Employees are positive about work life in 2030, and there is no reason for companies and employers not to be, too. Globalization and the demands for flexibility in work life create the opportunity to turn to a global labor market and talent pool. Automation and service creation create new business opportunities that also help employees to thrive, perform and dedicate themselves to tasks they themselves find developing and meaningful. With the individual's personal possibilities and needs in focus, managers can ensure that each employee's potential is fulfilled, while at the same time more easily prevent and capture any dissatisfaction, health concern or other things that negatively affect productivity or contribute to talents opting for another employer.

For employers and companies, the ongoing development of work life provides many opportunities, but also demands the courage to think new in order to stay relevant for customers, partners and employees. Sodexo is no exception. We have long followed and welcomed the changes in work life in order to be at the forefront with our service offering – work which intensified when the corona pandemic came and we realized that the enforced work from home would probably have a significant and lasting effect on both work life and our business. The uneven occupation of the offices, an increasingly distributed and individualized workforce, and new technical solutions means that we have shifted the focus from the workplace to work life and developed our services accordingly. It is, has been, and always will be central to us to adapt to changes in work life, because we want to continue to meet people where they need us, regardless of where and how they work.



Companies and employers who want to stay relevant to customers, partners and employees must dare to find new solutions to adapt to the new work life. The time to make those changes is now.

For Sodexo, just like for other companies and employers who want to stay relevant, it is important to dare to let go of things that no longer work and try new solutions. For many, this requires major and not always comfortable changes in everything from leadership to products and services. Which in turn means redistribution of resources, planning, will and courage to change. But changes are necessary, and the time to make them is now. Work life is in the midst of a significant, major shift, giving employers and companies a unique opportunity to build new and better. Those who learn from the challenges and success factors of recent years and at the same time take advantage of the opportunities offered by the prevailing work life trends will have a good chance of winning both the battle for customers and the battle for talent. ■