

Turning Insight into Foresight

Trends in Offshore Worker
Quality of Life Expectations

**SODEXO'S GLOBAL OFFSHORE & MARINE
CONSUMER SURVEY
2015 - 2018**



sodexo
QUALITY OF LIFE SERVICES

Foreword

Let's face it, living offshore can be both physically and mentally challenging. But it doesn't have to be unpleasant. And according to the annual Sodexo Offshore & Marine Consumer Survey, for most offshore workers it isn't.

Quality of offshore life depends on three core factors: safety, comfort and social engagement. So, our mission is straightforward – to make sure offshore workers experience all three. The Sodexo Offshore & Marine Consumer Survey provides great insight into the everyday lives of thousands of offshore workers and how we can best adapt to their changing needs. We are extremely grateful for their nearly 60,000 responses over the last four years which have made this paper possible.

In 2017, Sodexo also conducted a separate survey exploring employers' business priorities. The results confirmed safety as the number one concern – with both physical and mental well-being also

ranking highly. These findings have helped influence our approach.

As a global service provider uniquely placed to explore and understand these insights, Sodexo is driving ever-deeper client relationships in a rapidly changing environment. What follows is a window into this knowledge and some examples of how we turn insight into foresight to improve offshore quality of life.

Lindsay Tocher,
CEO Offshore &
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Sodexo



THE OFFSHORE & MARINE CONSUMER SURVEY

Sodexo's Offshore & Marine Consumer Survey is conducted by BVA, an independent specialist research firm, to ensure a high response rate and statistical accuracy. There has been a steadily rising number of participants – from 9,000 in 2015 to 17,000 last year. The 2018 survey in total covered 53 sector clients at 209 sites in 15 countries and nine languages.

With several years of data, we are now able to spot trends and track how we are doing in their context. This allows us to look not just at the whole – that satisfaction with Sodexo is consistently high among offshore workers, for example – but also at the sum of the parts.

COMPETITIVE LANDSCAPE, CHANGING DEMOGRAPHICS, RETENTION

The offshore oil and gas sector is male-dominated and staying that way, but the proportion of youngest and oldest workers has fallen in recent years. There has been a significant rise in those aged 36-45 from 29.7% in 2015 to 36.5% in 2018. Overall, 73% of the offshore workforce is between 25 and 45. This means **most offshore workers are now mid-career**.

“There is a digital media gap between onshore and offshore and we are bridging it.”

As a result, consumer expectations and client needs are changing with **digital transformation** an increasingly important part of the offshore experience. There is a digital media gap between onshore and offshore and we are bridging it. By listening to offshore consumers and mapping their pain points, Sodexo has designed a seamless end-to-end experience, delivering more choice and value and making offshore feel more like home. Digital technologies such as cashless payments, retail self-checkout and click-and-collect – now commonplace in day-

to-day onshore living – are becoming part of our offshore portfolio. And with mobile applications, we can monitor consumer satisfaction much more holistically and precisely.

By embedding innovative thinking about digitisation and automation into the heart of our business strategy, Sodexo is on **the cutting edge of improving the customer journey** – taking into account the demographics of a younger workforce and their expectations for a more “normal” offshore quality of life.

Across the life of the survey, there has been a **marked shift towards longevity of service** – a good sign given an increasingly competitive landscape for recruiting and retaining talented employees. In 2015, only 26.7 % of respondents had been at the site for more than two years. By 2018, this figure had nearly doubled. Average length of service at the sites surveyed is now nearly four years compared with 3.2 years in 2015. Length of time with employer was 7.3 years on average in 2018 while the average time working offshore was 11.3 years.

73% of workforce aged between 25 and 45

Average length of service at the sites surveyed was nearly **four years**

Average length of time with employer was **7.3 years in 2018**

OFFSHORE CONSUMER PRIORITIES

Just as both physical and mental health are priorities for employers, so too are they for offshore workers. These findings have been consistent across survey years.

Physical health

Offshore workers are increasingly aware of the benefits of **healthy eating, exercise and rest**. Nearly two-thirds (61%) of those surveyed in 2018 said that widening the range of healthy food is a priority, a 10-point rise from 2016. Weight loss was cited by 22% as a priority with 20% wanting **more nutritional information** and 14% wanting more nutritional advice.

Quality and quantity of gym equipment is also trending upward with more than half (53%) now wanting a wider range of **improved gym equipment**, a further 18% seeking **training programmes** and 17.5% interested in direct incentives to exercise.

Offshore workers wish to see improvements in their cabins too with nearly two-thirds (65%) of 2018 respondents saying a **better mattress and pillow** is a priority – up 15 percentage points

from 2016 and one respondent pointing out the relationship between fatigue and the potential for injury. Around one-fifth (21%) cited a need to improve furniture and fittings while the remainder wanted improved storage or lighting.

In 2017, the survey specifically asked workers about their overall health with 27.5% reporting they felt very healthy and 69% healthy. The response was similar in 2018 with respondents scoring an average 7.95 out of 10 to the statement “I am able to maintain a healthy lifestyle”.

61% said that widening the range of healthy food is a priority

53% want a wider range of improved gym equipment

65% say a better mattress and pillow is a priority



Mental and emotional health

The offshore environment can challenge both mental and emotional health. Offshore employees are increasingly aware of potential issues and interested in ways the working environment can be improved to help support well-being.

For example, in 2018 two-thirds of employees regarded **health and well-being as very important** with a further 30% saying it is important. One respondent commented about the lack of space for post-shift socialising and relaxation. Some 43% would like **designated quiet areas** for yoga or relaxation, while more than a quarter (28%) said **stress management counselling** is a priority. Feeling in good shape was a priority for 45%.

That said, the most recent survey also revealed that **employees are broadly happy with quality of life offshore**. When scoring the statement "Overall, I am satisfied with my life as a whole these days" they scored 8 out of 10 on average. They were also satisfied with their ability to keep in contact with friends and family (8.06) and their sense of belonging on board (8.15).

Two-thirds regard health and well-being as very important

43% would like designated areas for yoga or relaxation

28% said stress management counselling is a priority

Feedback-driven improvements

With today's offshore workforce prioritising things like a healthy lifestyle, sense of belonging and feeling safe, rested and valued – our Offshore Life offer has been refreshed. We've increased the variety of healthy food and communicate more about **healthy eating and well-being** via new signage and monthly themed posters. **Sustainability** has become a bigger part of our approach to sourcing, waste management and packaging. And we're placing greater emphasis on cabin area embellishment, improved furniture and fittings, greater gym access and better sleep place comfort.



AddMoreSphere provides a warmer environment through re-styling of living quarters



The Corner is a flexible, modular and scalable service to provide consumers a consistent retail experience and large choice of products



Wellness & You is our dietician-approved healthy and balanced food offer promoting healthy eating habits and nutrition awareness



Comfort & You provides the best cabin atmosphere by, among other things, respecting sleep and shift