

EVERYDAY WELLBEING @ WORKPLACE

How workplaces are shaping everyday
health, habits and experiences

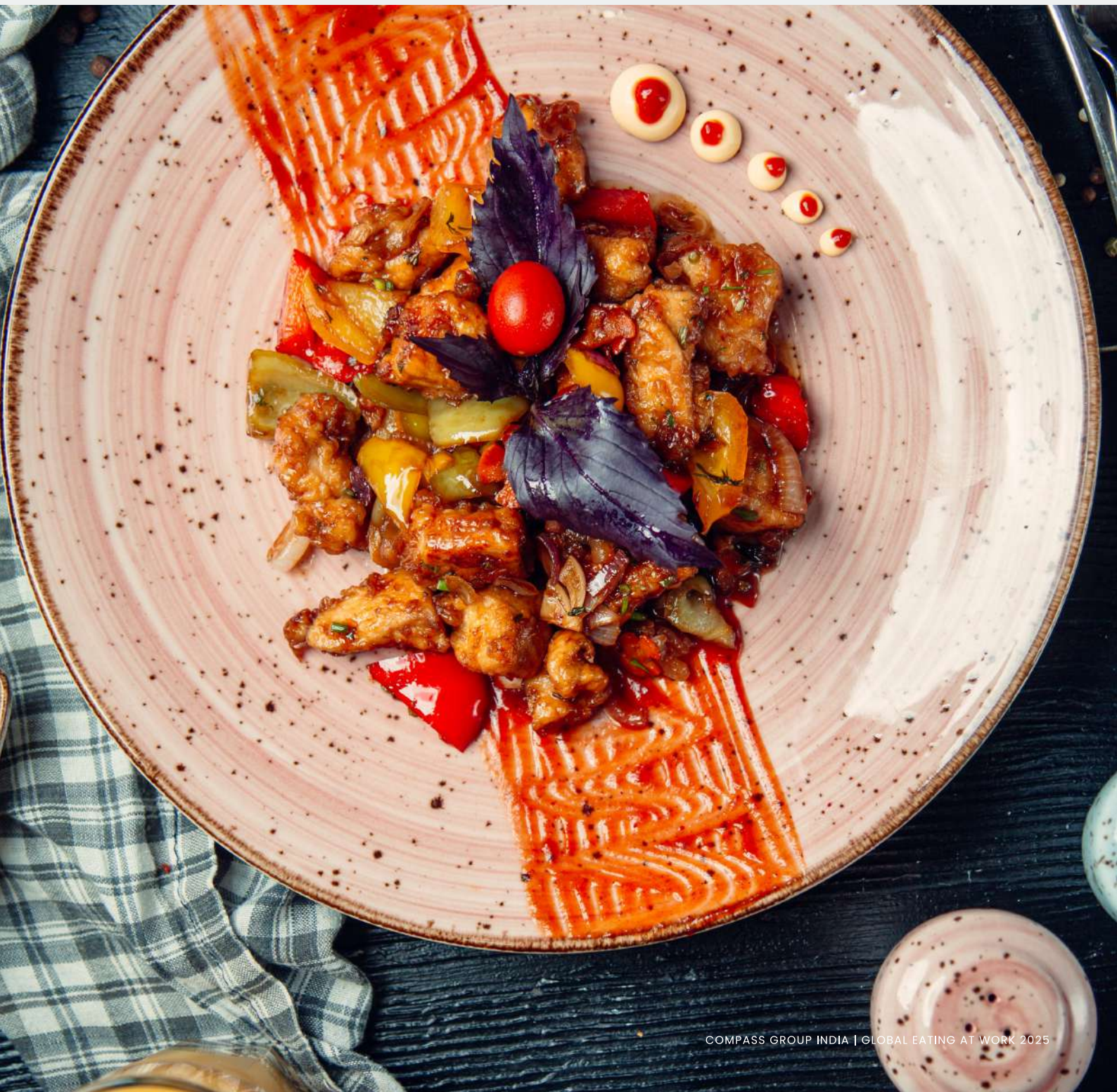


FOREWORD

For most employees, a large part of life happens at work. Between back-to-back meetings, rushed lunches, quick coffee breaks and long hours at a desk, the workplace quietly shapes many of our everyday habits, including how we eat, recharge and take care of ourselves.

As expectations from the workplace continue to evolve, employees are looking for more than just a place to work. They are seeking environments that support healthier choices, offer convenience without compromise and make it easier to maintain balance during busy workdays.

The Global Eating at Work study by Compass Group explores this shift and the changing relationship between work, food and employee experience. It highlights how organisations have an opportunity to create workplace environments that not only support productivity, but also positively shape the everyday lives of their people impacting long-term wellness.



SIX SHIFTS RESHAPING WORKPLACE EXPERIENCE IN INDIA



SHIFT 1: BREAKS ARE THE OVERLOOKED BATTLE AT WORK

Break times are shrinking, making moments of recovery increasingly valuable. Protecting breaks safeguards wellbeing, productivity and retention.



SHIFT 2: THE WORKPLACE IS BECOMING A HEALTH PLATFORM

Employees are more intentional about their diet and habits on working days than non-working days. This creates a powerful launchpad for long-term health, with the right nudges and support.



SHIFT 3: FOOD PLAYS A DUAL ROLE: FUNCTIONAL & EMOTIONAL

Employees want to eat healthily, but emotional triggers and guilt often derail them. The opportunity lies in supporting progress, not perfection.



SHIFT 4: HEALTH & FOOD INNOVATION IS REDEFINING EXPECTATIONS

From weight-loss medicines to functional foods that support sleep and focus, FMCG innovation is reshaping what employees expect from workplace food and drink.



SHIFT 5: CONVENIENCE MUST BALANCE TECHNOLOGY WITH HUMANITY

Workers welcome digital tools that save time but still value human connection. The sweet spot combines digital ease with a personal touch.



SHIFT 6: SUSTAINABILITY NEEDS REFRAMING

Consumers care about sustainability but often doubt their own impact. The focus should be on visible, tangible actions such as waste reduction and local sourcing, rather than abstract claims.

SHIFT 1: BREAKS ARE THE OVERLOOKED BATTLEGROUND AT WORK!

Workdays are getting longer, calendars are getting fuller and the line between work and life is becoming harder to spot, making balance feel more challenging than ever.



Breaks are becoming less frequent

44%

of employees in India take two or fewer breaks per week.

They're becoming shorter too

1 in 5

employees now take breaks of 15-mins or less – a 67% jump from 2023.

And extended breaks are rare

15%

take a break longer than 45 minutes.



BREAKS ARE TAKING A BACK SEAT

Employees know breaks matter, but many aren't taking enough of them. Time pressures and busy schedules continue to push breaks aside.

63%

of employees feel breaks are overlooked or undervalued in their organisation and

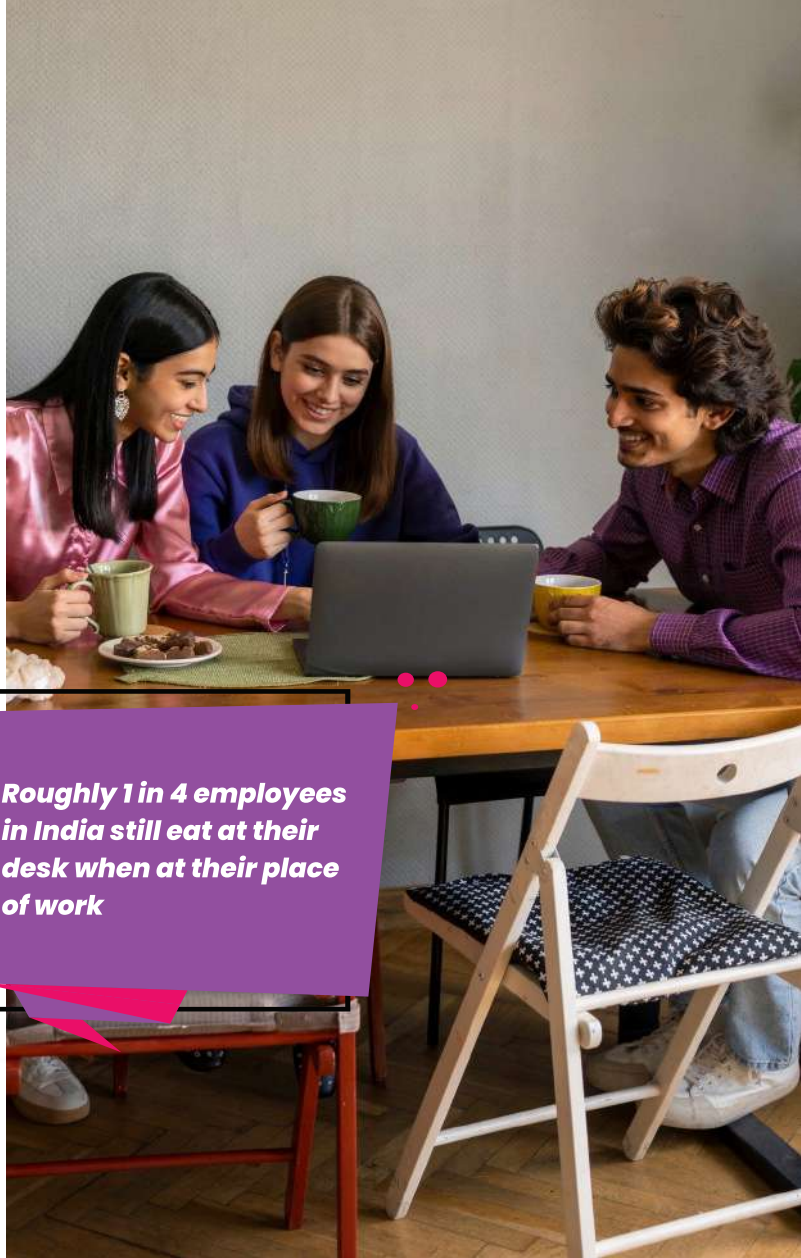
45%

of employees only take breaks when they feel the circumstances allow them

When people feel that breaks at work aren't supported by their employer, they are more likely to skip, shorten or deprioritise them to appear productive or stay visible, which is why creating spaces and cultures that make employees actually want to pause, recharge and step away from their desks matters more than ever.

According to the WHO and research published in The Lancet, people who sit for more than eight hours a day are at twice the risk of developing heart disease compared with those who sit for less than four hours.

Roughly 1 in 4 employees in India still eat at their desk when at their place of work



CAFETERIA AS A PLACE FOR PSYCHOLOGICAL RESTORATION

What this means for you:



Thoughtful food choices can make breaks more restorative.



Menus can be shaped around different break moments.



Food and ambience can come together to support moments of reset.



Functional nutrition can bring focus, calm and gut health into everyday breaks.



SHIFT 2: THE WORKPLACE IS BECOMING A HEALTH PLATFORM

EVERY MEAL, SNACK OR BREAK BECOMES AN OPPORTUNITY TO SUPPORT HOW PEOPLE FEEL, THINK AND PERFORM.

Health is built at work. Employees are taking an increasingly holistic view of their health and seeking to use their working week as a platform to build and sustain healthier habits. For employers, the opportunity lies in showing that maintaining good health isn't about perfection, but about the small, everyday choices that add up.

90%

of employees across all generations want healthier food choices at work.

The same focus on wellbeing is shaping how employees think about movement at work.

EMPLOYEE PERSPECTIVES ON STAYING ACTIVE

Being at the workplace naturally promotes movement, making it easier for employees to stay active and energised.

60%

say being physically active is one of the most important factors for long-term health and longevity.

75%

of non-hybrid employees are active on working days.

80%

of Indian employees want to maximise break times to do the things they want to do.

While employees are increasingly aware of the importance of physical activity, the data suggests that workplace environments can play an important role in turning that awareness into action. With employees reporting higher levels of activity on workdays and in workplace settings, organisations have an opportunity to create experiences that encourage movement and support long-term wellbeing.

SIMPLE TIPS ON WAYS TO BUILD BETTER HABITS

- Reward every 5,000 or 10,000 steps with a free tea, coffee or snack.
- Create healthier snack bars in breakout areas and pantries.
- Ensure main meals have information on macros and micros available for employees.



While nutrition and movement dominate the longevity conversation, sleep remains an equally important part of the equation.

INDIA IS THE SECOND MOST SLEEP DEPRIVED COUNTRY IN THE WORLD

39%

of workforce sleeps less than 6 hrs a day.

Beyond health, sleep fuels memory, decision-making and emotional control – skills vital for collaboration and productivity. As RAND's research shows, even modest improvements in sleep could unlock billions in economic value, making rest not just a personal priority, but a business one.



<50%

employees trust Doctors/Nutritionists the most for health advice in India

THE SECRET SAUCE OF GOOD HEALTH FOR INDIAN WORKFORCE



72%

Nutrient-Rich Diet



64%

Physical Activity



61%

Quality Sleep

When a workplace makes it easier for people to look after their health, it sends a powerful message: your wellbeing matters here. Over time, these everyday signals of care can shape how employees experience their organisation, deepening connection, strengthening loyalty and influencing their decision to stay.

SHIFT 3: FOOD PLAYS A DUAL ROLE: FUNCTIONAL AND EMOTIONAL

Food at work must do more than just feed; it must deliver experiences and promote healthy longevity. Currently, high-street retailers are winning employee spend through highly innovative product launches, while offering variety and social spaces that meet the rising expectations of the workforce of the future.

Employees with onsite food and drink amenities are happier at work, suggesting that simple provisions can support engagement and retention.

For employees, restaurants are:
"A good place to catch up with colleagues"

Food choices are both functional and emotional for the young Indian workforce.

87%

of employees want workplace restaurants to mirror the experiential environments of the high street, to help drive the social experience.

91%

of Indian employees try to catch up with colleagues over food/drink at work (vs 69% global).

93%

say what they consume directly affects how they feel.

70%

of Indian adults are classified as emotional eaters (with significantly higher perceived stress).

55%

of Indians agree that tasty food helps to reduce stress by uplifting mood.

India stands out globally for its high access to on-site employee restaurants or canteens. More than half of the employees have dining spaces and cafeterias at the workplace.

Food has become more than a service; it has become a part of the employee experience.

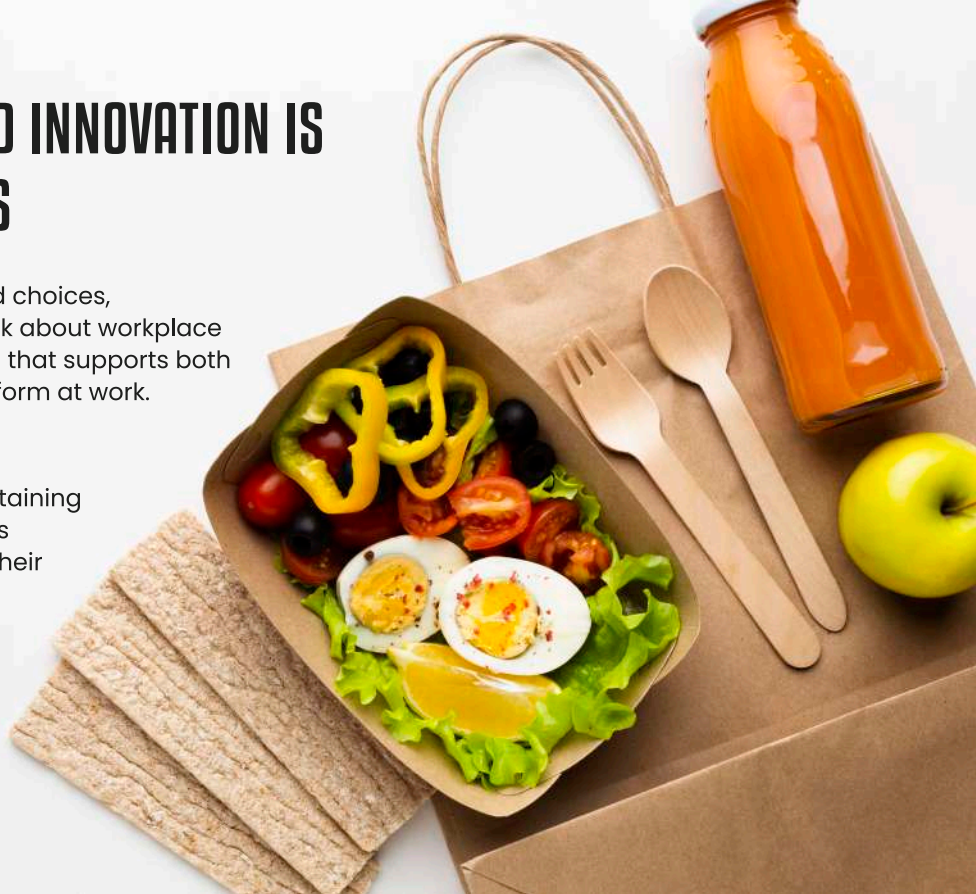
SHIFT 4: HEALTH AND FOOD INNOVATION IS REDEFINING EXPECTATIONS

From personalised nutrition to smarter food choices, innovation is changing the way people think about workplace dining. Employees increasingly expect food that supports both their everyday wellbeing and how they perform at work.

57%

of consumers say maintaining a healthy body weight is important to maintain their long-term health.

Weight-loss medications are gaining interest amongst Indian workforce.



Hence, employees are choosing more healthier food options. The typical Indian worker's diet remains largely plant-based, with vegetables, fruits, dairy and grains forming the core of everyday eating habits.



93%

employees are making changes to what they eat and drink, to support long-term health.



60%

employees are eating foods from across different food groups (e.g. carbohydrates, proteins and fats).

As people become more aware of how the food they eat impacts areas of health such as fatigue, focus, digestion and physical appearance, we see greater emphasis on tracking macronutrients and the use of data to guide dietary decision-making.

REGIONAL FLEX

India's palate is becoming increasingly local.

Hyperlocal cuisines are no longer a niche, with a 200% surge in Google searches for regional favourites like Patra ni Machhi, Bhutte ka Kees and Kolhapuri Tambda Rassa since 2022.



RISE OF THE SNACKING SOCIETY

Traditional meal patterns are evolving. As workdays become busier and more flexible, employees are shifting from fixed mealtimes to convenient, on-the-go snacking. Snacking has hacked modern mealtimes globally. Food and drink companies have primarily aimed snacks towards Gen Z and Millennials, because younger adults spend more time out of the home, prefer novel foods and flavours, are less habitual in their mealtimes and are more impulsive.

EMPLOYEES TYPICALLY CONSUME 2+ SNACKS DURING A REGULAR WORKDAY IN THE OFFICE.



GEN Z SNACKS THE MOST

42% are snacking
3+ times a day

THE SHIFT TOWARDS NUTRI-LICIOUS SNACKING

Healthy, nutrient-rich snacks are becoming the preferred choice for today's workforce.



57%+ nuts & seeds



57%+ popcorn



41%+ dal based snacks



33%+ makhana

Employees increasingly want convenient, accessible options that fit around their workday. The rise of mindful snacking is bringing greater demand for choices that are high in fibre and protein, nutritious and satisfying, without compromising on taste. For employers, this creates an opportunity to make healthier, more nutritious snacking a seamless part of the workplace food experience.



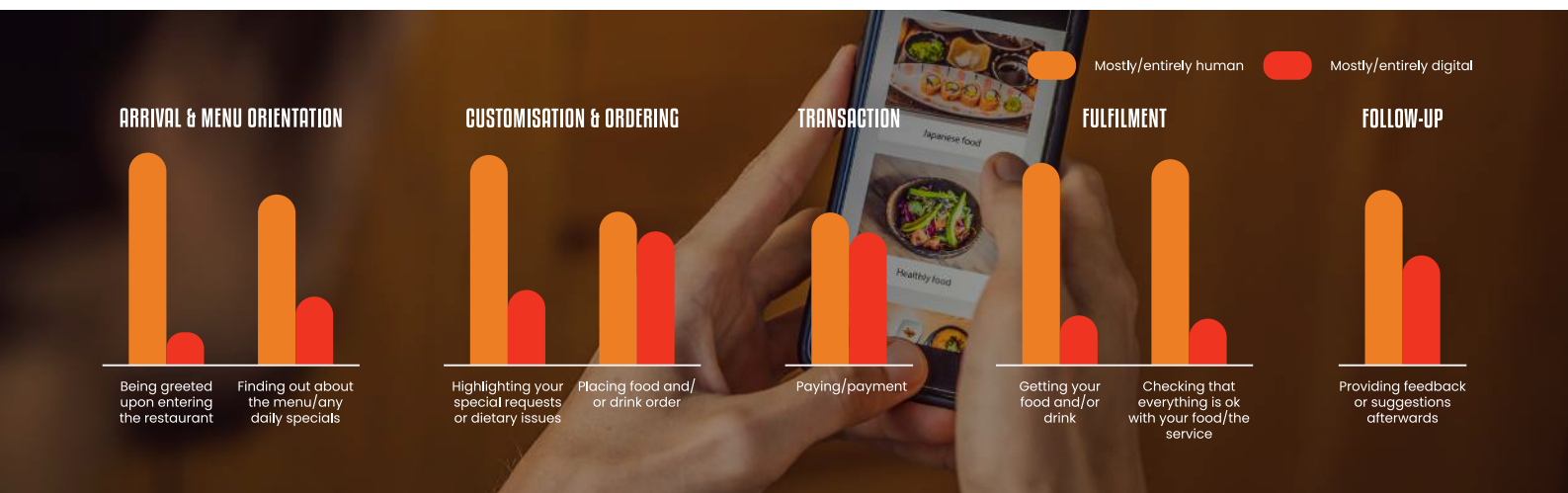
SHIFT 5: CONVENIENCE MUST BALANCE TECH WITH HUMANITY

Ease and efficiency continue to shape food choices at work, but there is a delicate balance required between technology and human interaction.

INDIA WANTS BOTH: SPEED OF TECH, WARMTH OF HUMANS

While in many markets consumers are proving somewhat reticent about tech in foodservice, Indians are embracing technology not as a replacement for human touch, but as a powerful partner, delivering speed and convenience through digital tools and automation.

Employee preferences for human and digital interaction across workplace food touchpoints.



MOBILE ORDERING AND KIOSK ORDERING ARE ALL SEEN AS IMPROVING THE CUSTOMER EXPERIENCE IN INDIA

84% say mobile pre-order & pre-pay improves convenience.

80% say touchscreen kiosks make ordering faster and easier.

80% say made-to-order vending enhances the dining experience.

67% people feel AI chatbots or voice bots improve the dining experience significantly.

These technologies are already widely familiar to consumers in urban India and they are not just accepted but seen as beneficial. This makes them a low-barrier efficiency solution that can be rolled out on a scale across industries and regions.

SHIFT 6: SUSTAINABILITY NEEDS REFRAMING

In India's early-stage sustainability landscape, consumers express strong aspirations rooted in traditional values and localism, yet there remains a significant gap between intentions and actions, with practical efforts focused more on visible, community-driven initiatives like waste reduction.

58%

people in India feel their behaviour can make a positive difference to the environment.

92%

of Indian employees agree employers have a responsibility to proactively promote sustainability.

91%

say it is restaurants' responsibility to make menu options more sustainable.

SUSTAINABILITY ACTIONS IN FOOD SERVICES VALUED BY CONSUMERS THE MOST

41%

say sustainable disposal of food waste.

36%

say reducing carbon footprint.

31%

say supporting small or independent farmers.

28%

supporting community initiatives.

As employees become more intentional about what they eat, they are also paying closer attention to the impact their choices have on the world around them.

43%

of Indian employees feel reducing food waste could have the biggest impact on the planet.

The workplace experience is often shaped by the moments people rarely think about: grabbing a coffee between meetings, choosing what to eat, connecting with colleagues over a meal or simply taking a break to recharge. As employee expectations continue to evolve, workplace dining has an opportunity to do more than serve food. It can support wellbeing, enable convenience, foster connection and contribute to a more sustainable future.

THE PATH FORWARD IS CLEAR

India's working public has told us clearly what they expect from the workplace: better opportunities to recharge, healthier choices, meaningful connections, seamless convenience and visible sustainability. The organisations that respond to these evolving needs will be best placed to create workplaces that enhance wellbeing, productivity and employee experience.



PROTECT THE BREAK, OWN THE MOMENT

Redesign menus and spaces around shorter, more frequent breaks — make every micro-moment restorative.



OUTCOMPETE THE HIGH STREET

Bring novelty, collabs and experiential design into everyday cafeterias to defend share vs delivery and retail.



BLEND TECH SPEED WITH HUMAN WARMTH

Digitise ordering and payment; keep greeting, fulfilment and feedback human wherever it builds trust.



MAKE THE WORKPLACE A HEALTH PLATFORM

Use nudges, portion design and clearer nutrition information to turn workdays into habit-building moments.



LEAD SUSTAINABILITY THROUGH SIMPLE, VISIBLE ACTION

Champion waste reduction and local sourcing as the credible, scalable entry point.







Compass Group India

7th Floor, Tower B4, Spaze I-Tech Park, Sohna Road, Sector 49, Gurgaon - 122018, Haryana

 info.india@compass-group.co.in  www.compass-group.co.in

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