



Laundry Industry
Culture Study
2022

Brands with Values™



with values™



Contents

02	Foreword
03	Executive summary
04	Culture Decoder
05	The results Highlights
06	Diversity categories
	Analysis
8	Community driven people
10	Success is important, but there's a catch
12	Two changes to reach the desired set of values
14	Culture: driven by common and self interest
16	Cultural health
18	Belonging can be improved
	Appendices
20	Appendix A: The response
21	Appendix B: Methodology
22	Appendix C: The results
24	Appendix D: Next steps

Foreword

David Stevens, CEO Textile Services Association

As CEO of the TSA, I am delighted to have engaged the laundry industry in its first ever culture and inclusion study. The economic impact of the pandemic has been dramatic on virtually all the markets our sector supports, particularly hospitality. With the added uncertainty Brexit and the war in Ukraine has created, the speed of recovery is uncertain. What is certain is that access to labour and talent may well prove the difference between success and failure.

We started this journey looking at the diversity of our industry but quickly realised this will become self defining and was pretty much telling us what we already knew. It was only after joining the CBI's Change The Race Ratio Programme that we began to think more about culture and inclusion. We were keen for our members to understand how their company culture and the industry culture as a whole can impact the brand values of an industry and a business. The study allows our industry leaders to understand in simple language what matters to their individual employees the most and what needs to be changed or nurtured.

The Brands with Values technology allowed us to track the industry data set from a range of our member companies across a single platform. Our industry has always operated below the radar and it was reassuring to find that our overall **cultural health** score was better when benchmarked against UK PLCs, with community being the top value selected across all job roles.

The report demonstrates lots of positive aspects of our industry but also highlights areas we need to cultivate and that's the challenge we have tasked the industry with, **long hours** and **demanding** being highlighted particularly by floor managers and drivers. Over the next 12 months, we will be facilitating a range of forums and training sessions to help equip the industry with the tools it needs to make it an even more inclusive and enjoyable place of work.



David Stevens
CEO
Textile Services Association

The textile services industry

The textile services sector sits behind practically every sector of the UK's economy. The service it provides is core to the operations of many businesses in vital and important sectors of the UK economy.

EMPLOYS
24,000

PROCESSES
53
MILLION
PIECES PER WEEK

Without a professional laundry service...

90% OF HOTELS (10-BED PLUS)
WOULD BE FORCED TO CLOSE
WITHIN **THREE DAYS**

90% OF HOSPITALS
WOULD BE FORCED TO CLOSE
AFTER JUST **ONE DAY**

PHARMACEUTICAL & FOOD
PROCESSING FACTORIES
WOULD CLOSE
FOLLOWING A **SINGLE DAY**

Executive summary

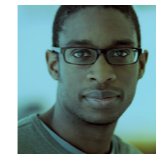
Martin Roach Brands with Values

We are pleased to present our first culture study on the laundry industry, powered by the Brands with Values Culture Decoder and in partnership with The Textile Services Association.

2022 finds UK businesses in uncharted territory. As the world inches hopefully towards a new post-pandemic status quo, it is undoubtedly still reeling from two wildly turbulent years. With endless political wrangling, economic repercussions and global polarisation over a wide range of issues, no workforce in any industry has been left untouched. That's why there's never been a better time to examine the culture within.

This report finds the laundry industry with a very positive cultural health rating and in an unprecedented position, forming the baseline for future investigations into its internal culture.

We also hope that it will serve as a springboard for change, inspired and driven by its people.



Martin Roach
Founder
Brands with Values

Culture Decoder

The Laundry Industry Culture Study 2022 is powered by Brands with Values' Culture Decoder. The Culture Decoder is a scientifically-led, values-based assessment tool, designed to investigate the circular values system in all of us. This lens allows us to understand the following values, split by age, tenure, ethnicity, company size and sexual orientation:

The report looked specifically at the following circular values:

Personal Values

What is important in everyday life, not just at work.

Workplace Values

What current values you are seeing in your existing workplace.

Desired Values

What you would like to see within the laundry industry.

Cultural Health Score

Measuring the overall health of a culture.

Belonging Score

An assessment to see if your personal values match the values found in your current workplace.

The values selected by participants from the culture study all fall into one of the following categories and this is determined by the Culture Decoder:

Tradition

Restraint of actions, inclinations and impulses likely to upset or harm others and violate social expectations or norms.

Safety

Safety, harmony and stability of society and relationships.

Authority

Social status and prestige, control or dominance over people and resources.

Success

Success through demonstrating competence according to social standards.

Pleasure

Pleasure and sensuous gratification.

Adventure

Excitement novelty, and challenge in life.

Independence

Independent thought and action - choosing, creating and exploring.

Selflessness

Understanding, appreciation, tolerance and the welfare of all people.

Community

Preservation and enhancement of the welfare of people in frequent personal contact.

The results Highlights

01

Community is the most important set of values to employees within the laundry industry

02

TSA members desire a culture that is successful, respectful and honest

03

TSA members see their company cultures as healthier than the UK overall

04

30% of respondents identified the industry's culture as demanding, and 23% as long hours.

05

Over 500 employees contributed to the survey, across all roles and demographics

Laundry industry demographics

Diversity categories

Figure 01
Respondents' Ages

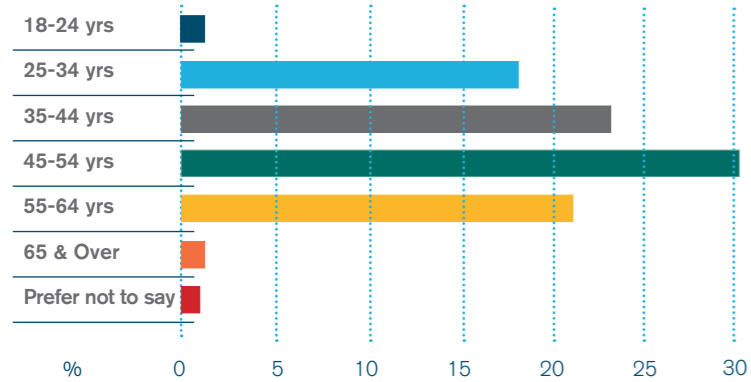


Figure 02
Respondents' Ethnicity

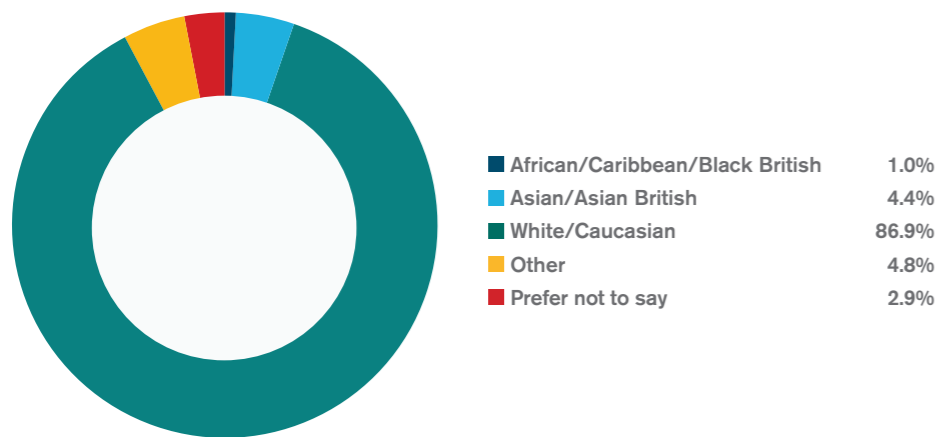


Figure 03
Respondents' Disability

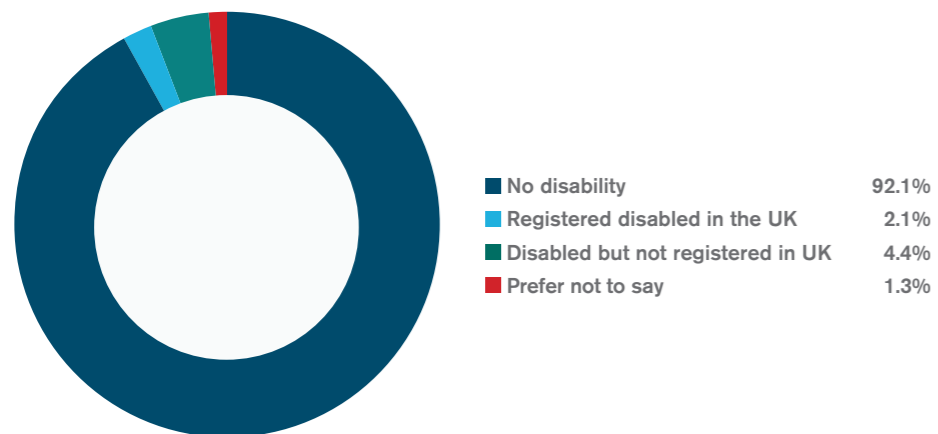


Figure 04
Respondents' Gender

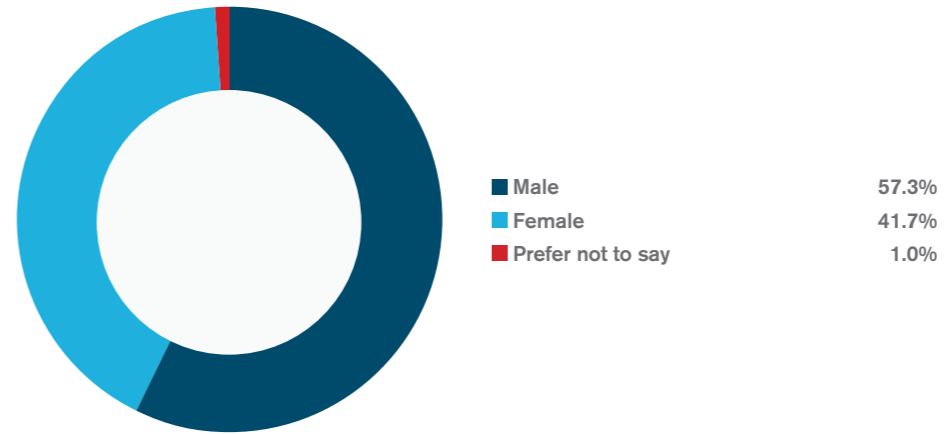


Figure 05
Respondents' Sex

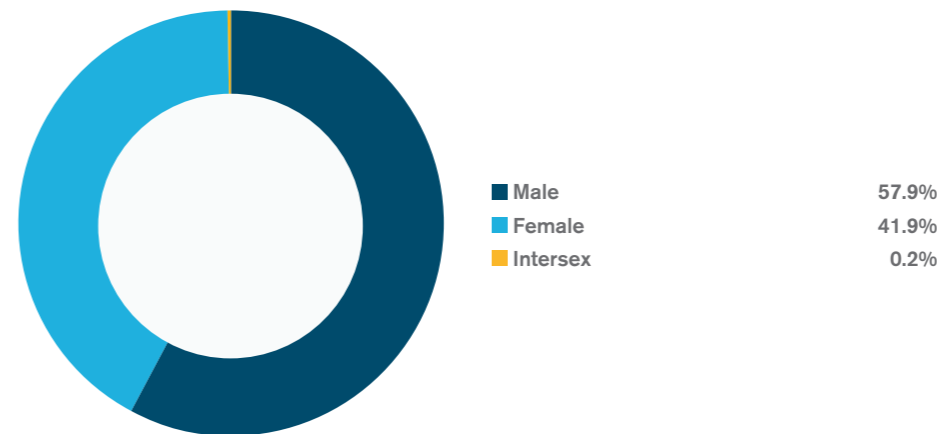
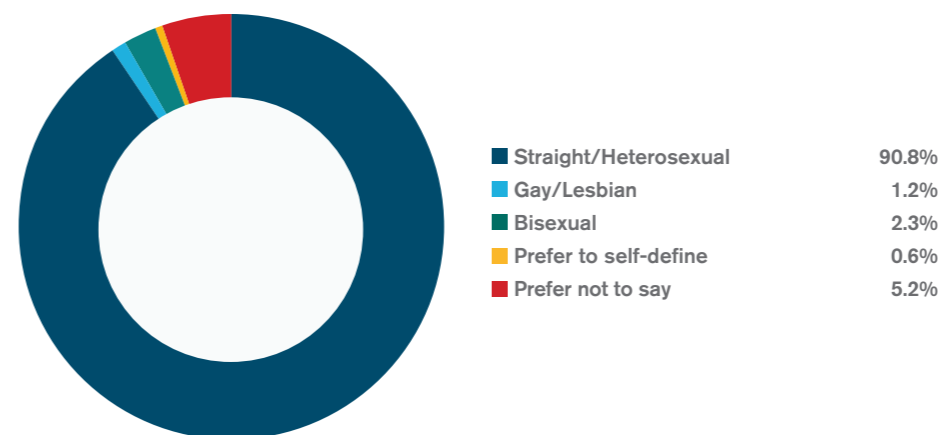


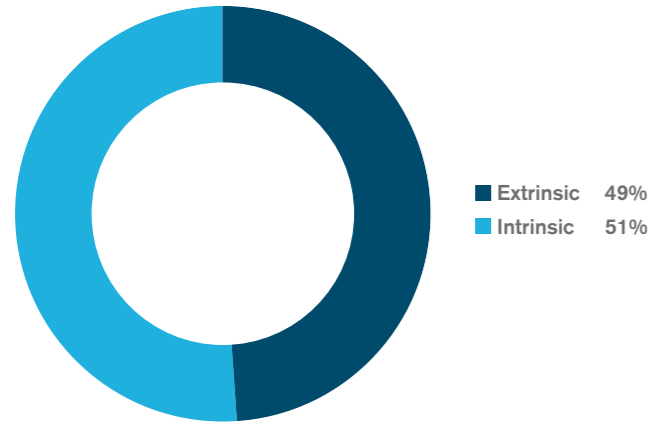
Figure 06
Respondents' Sexual Orientation



1. Personal values analysis

Community driven people

Figure 07
Personal Values



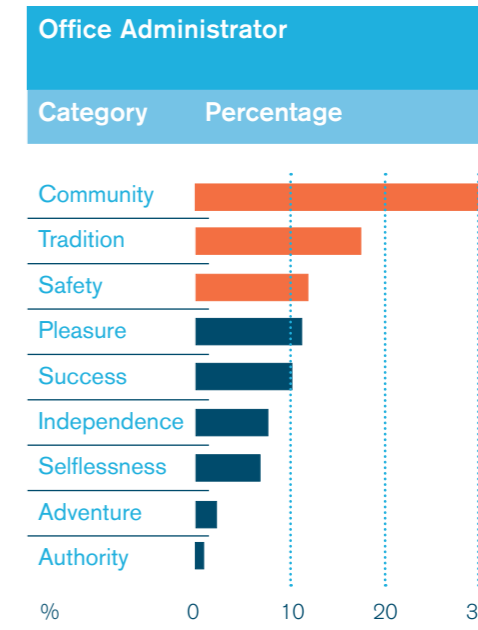
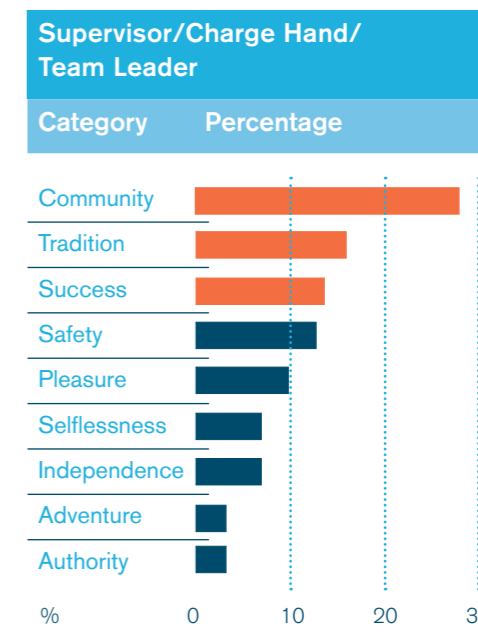
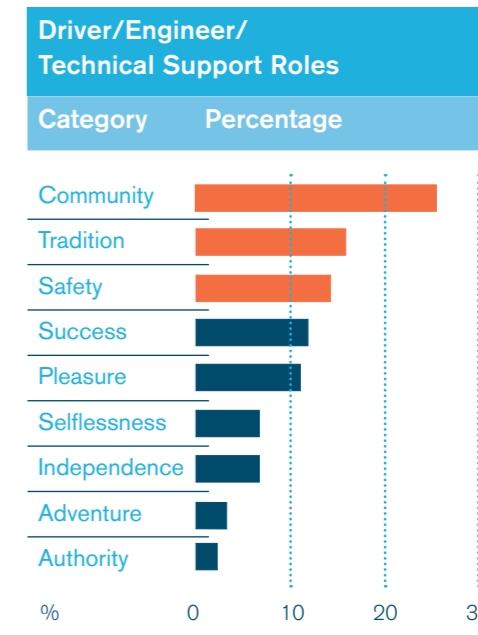
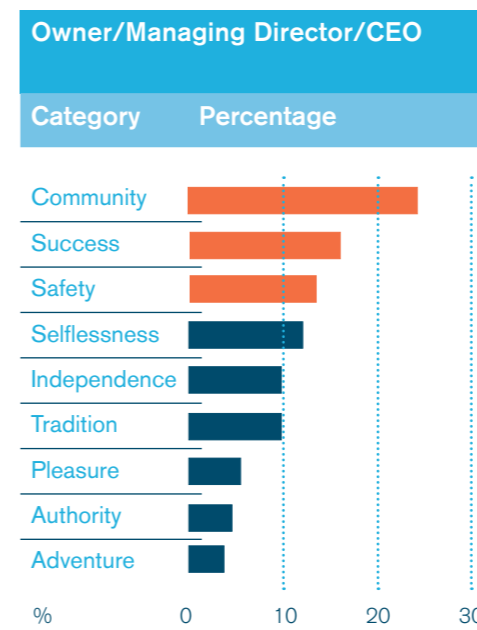
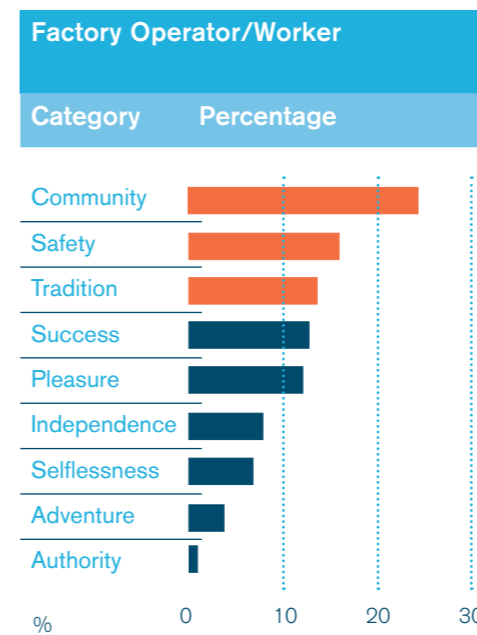
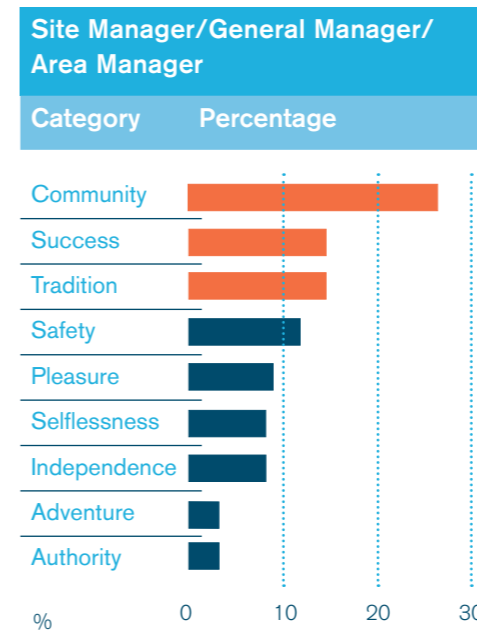
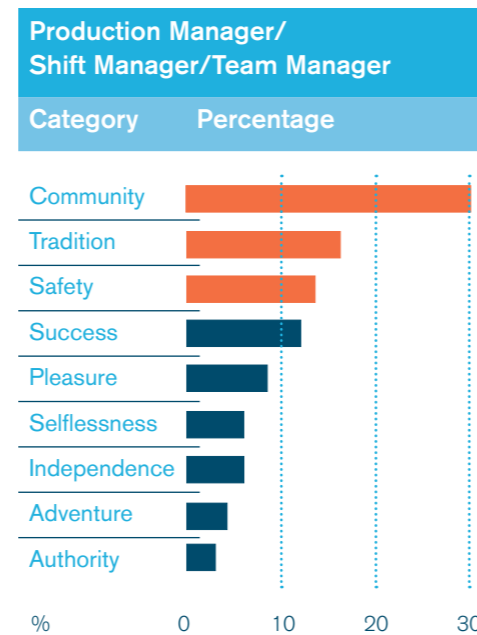
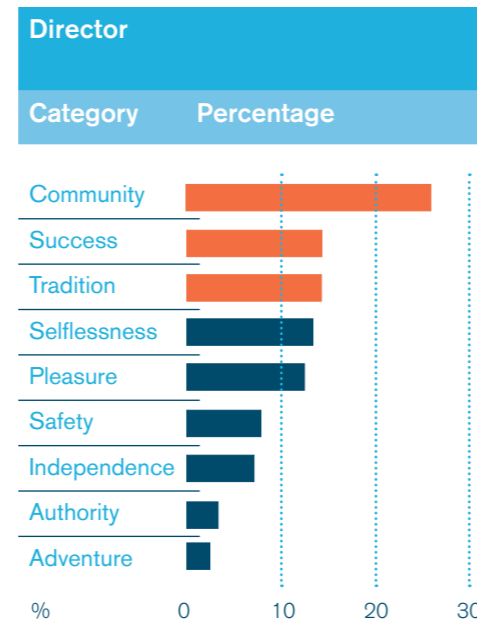
Over half of all words selected as Personal Values fall into the Community category, which represents the preservation and enhancement of welfare. Honesty is the top personal value, selected by 54% of responders, followed by Friendly and Loyal. Tradition is also important, with themes identified as Respectful and Polite.

Community is the top value across all roles in companies, and Tradition is almost universally considered to be one of the top three values. However, more senior roles tend to favour Success in their top three, with junior roles generally favouring Safety.

Figure 08

Personal Values		
Top 10 Words	Category	Category
Honest	Community	Intrinsic
Friendly	Community	Intrinsic
Loyal	Community	Intrinsic
Reliable	Safety	Extrinsic
Respectful	Tradition	Extrinsic
Helpful	Community	Intrinsic
Polite	Tradition	Extrinsic
Dedicated	Community	Intrinsic
Capable	Success	Extrinsic
Independent	Independence	Intrinsic

Figure 09
Top three category



2. Workplace values analysis

Success is important, but there's a catch

Although Community, and the value of Friendly, came top in workplace values, the most common category identified by employees was Success.

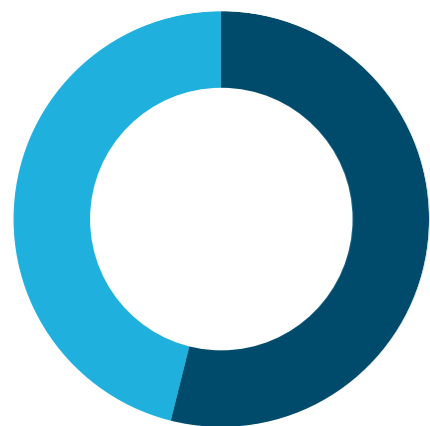
However, the top personal value, Honesty, did not appear in the top ten workplace values. When evaluating workplace values, the theme of Success identified unhealthy values: Demanding and Long-hours.

All employees share the same top three categories, regardless of role and seniority. However, leaders cite few unhealthy values, although these are consistently identified by more junior roles. In particular, drivers and engineers identified four unhealthy values in their top ten.

Workplace culture does not appear to be impacted by a company's size. The exception is companies under 20 employees. Although different sized companies all cite Demanding as a feature of their culture, only companies with 20 employees or fewer cite Demanding as their top value, with almost half of respondents (44%) recognising this unhealthy feature in their company.

Figure 10

Workplace Values



■ Extrinsic Values 54%
■ Intrinsic Values 46%

Workplace values are consistent across regional places of work. Friendly or Challenging were the top values identified, and the top three categories were Community, Success and Safety. Demanding is a top value across all regions.

Age groups also share the same top three categories, although these differ from regional places of work: Community, Success and Safety. The exception is the youngest category of employee from 18 to 24, which values Tradition over Safety. In addition, the youngest age range is the only group to not identify a single unhealthy value. Demanding continues to be a top value recognised across all ages.

Figure 11

Workplace Values	
Top 10 Words	Category
Friendly	Community
Challenging	Adventure
Demanding	Success
Respectful	Tradition
Safe	Safety
Successful	Success
Long-hours	Success
Clean	Safety
Dedicated	Community
Reliable	Safety



3. Desired values analysis

Two changes to reach the desired set of values

Figure 12

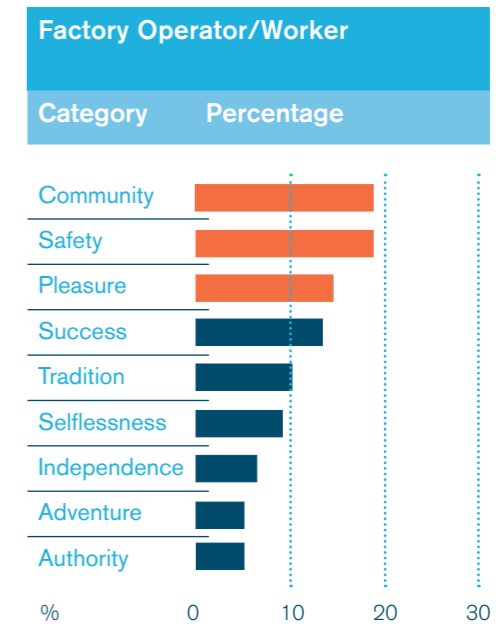
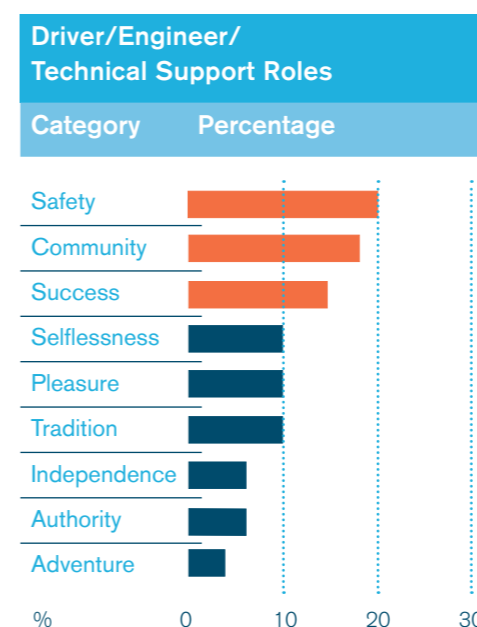
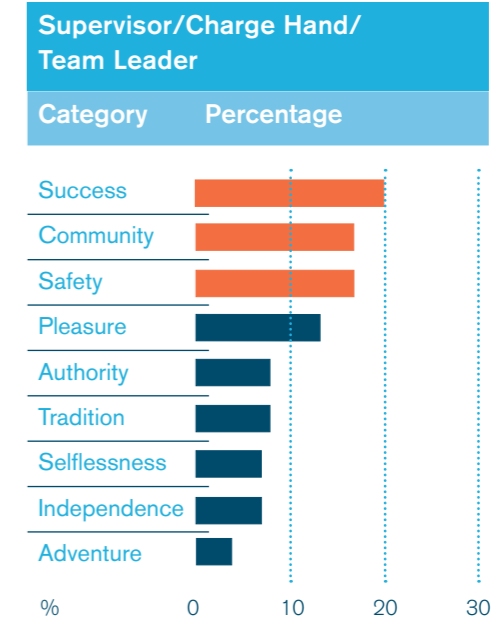
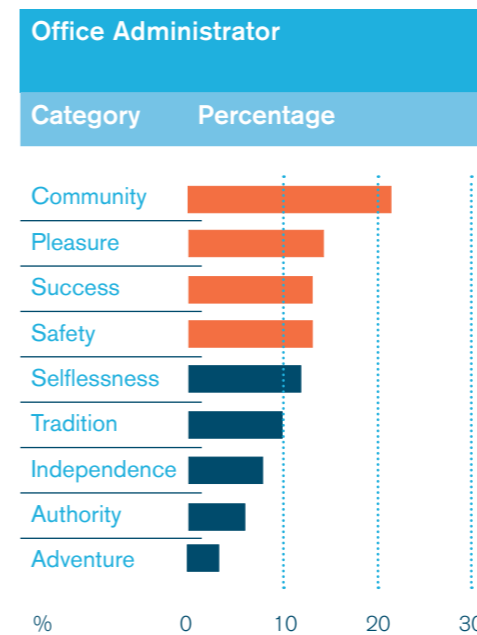
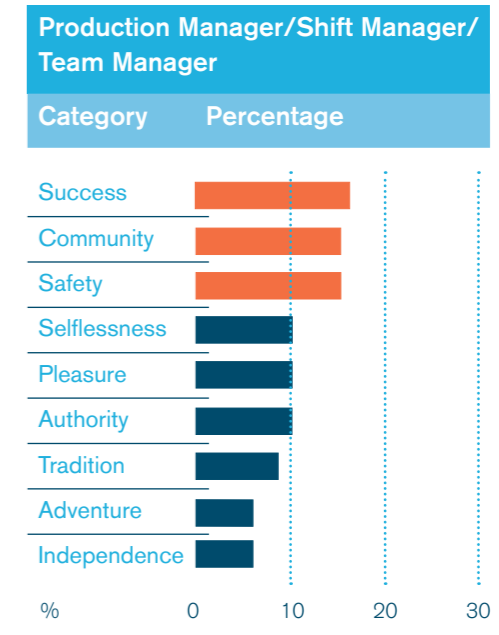
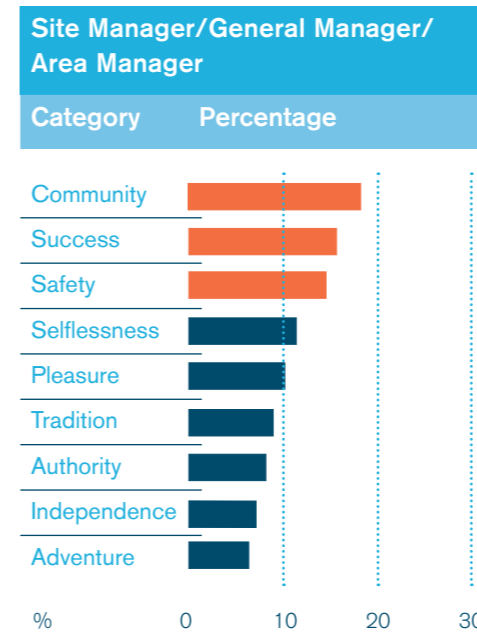
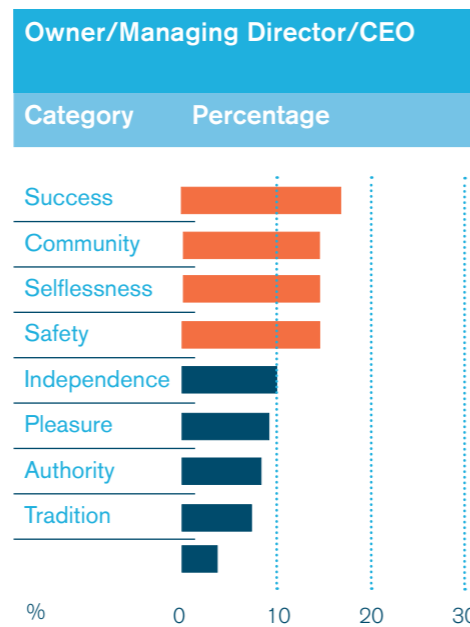
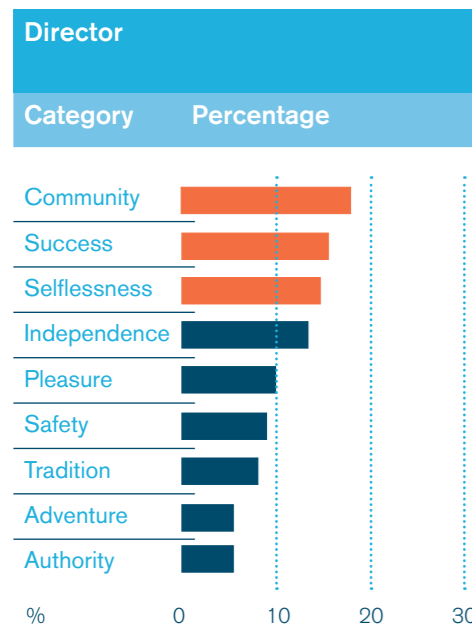
Top categories by values		
1. Personal Value	2. Workplace Value	3. Desired Value
Community	Success	Community
Tradition	Safety	Safety
Safety	Community	Success

The industry already demonstrates a personal and workplace emphasis on Community, which employees have expressed as their top value.

However, there are two areas for progress to be made to reflect the Desired Values. Personal Values recognise Community as a priority, but the value of Tradition could be deprioritised to make space for Success. Workplace Values are the same as the Desired values. However, Community values could be strengthened to become the single most important set of values, replacing Success, which we know includes unhealthy traits in the industry, such as Demanding and Long Hours.

In addition, the top categories for Desired Values are similar across roles in the industry.

Figure 13 ■ Top three category



Analysis

Culture: driven by common and self interest

Figure 14



Intrinsic values are inherently rewarding to pursue and are done primarily for self satisfaction.

Extrinsic values are centred on external approval or rewards.

Employees are divided on whether they prefer an extrinsic or intrinsic set of values from their employer, meaning values in the workplace are driven both by self-satisfaction and for external approval or recognition. Workplace values' intrinsic and extrinsic distribution is almost identical to personal values, demonstrating that workplace cultures are generally reflective of the employees' values (49% extrinsic, 51% intrinsic).

Community is the top Desired category, with Successful being the leading value, selected by almost half of respondents (42%).

There is a difference in expectation between leaders and employees. Leaders want to see greater Selflessness, while employees want to see greater Safety.

Figure 15

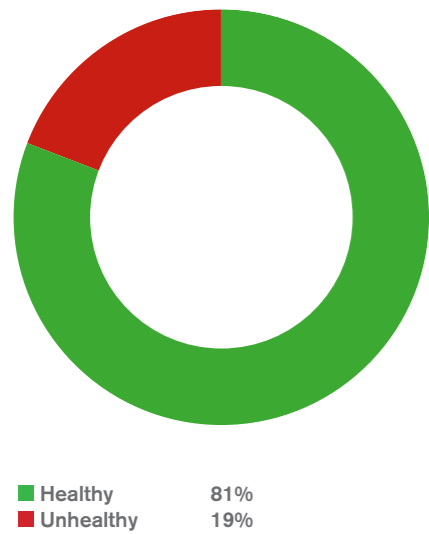
Workplace Values	
Top 10 Words	Category
Friendly	Intrinsic
Challenging	Intrinsic
Demanding	-
Respectful	Extrinsic
Safe	Extrinsic
Successful	Extrinsic
Long-hours	-
Clean	Extrinsic
Dedicated	Intrinsic
Reliable	Extrinsic



Analysis

Cultural health

Figure 16



The industry's cultural health is greater than 80%. Unhealthy values, representing 19%, are broadly consistent with the benchmark of 20%. The benchmark of 20% is set by Brands with Values with scores greater than 20% deemed as unhealthy.

The top three unhealthy values facing the industry are: Demanding, Long-hours and Poorly Planned. Benchmarking demonstrates that these challenges are faced by UK PLC in general. However, the laundry industry appears to have issues concerning poor planning, cost reduction and confusion, rather than the more typical challenges of hierarchy, siloes or bureaucracy.

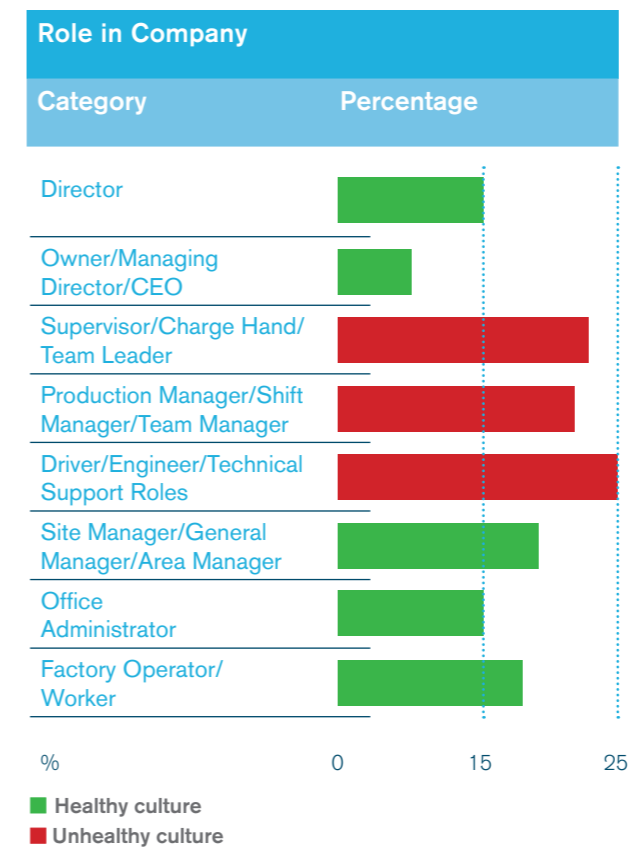
Unhealthy words UK PLC

Top 5 Words	Category	%
Demanding	Success	27%
Long-hours	Success	27%
Hierarchical	Tradition	23%
Siloed	Community	22%
Bureaucratic	Safety	20%

Unhealthy words TSA

Top 5 Words	Category	%
Demanding	Success	30%
Long-hours	Success	23%
Poorly planned	Independence	18%
Cost-reducing	Authority	16%
Confused	Adventure	13%

Figure 17



Although cultural health almost matches the benchmark, there is a difference in perceived health across roles in organisations. Leaders and lower level roles generally rate unhealthy values lower than the 20% benchmark, with CEOs and owners identifying only 7%. General managers, administrators and factory workers also rate under the benchmark. Team leaders, team managers, drivers and engineers rate unhealthy values at up to 25%.

Cultural health is worse for those who are disabled but not registered, and employees who would prefer not to say, at 24% and 23% respectively. Employees who do not identify as disabled are on the industry average at 19%, and individuals who are registered disabled have the healthier assessment of culture at only 6%.

Analysis

Belonging can be improved

Comparison of Belonging UK PLC and TSA Members

Figure 18

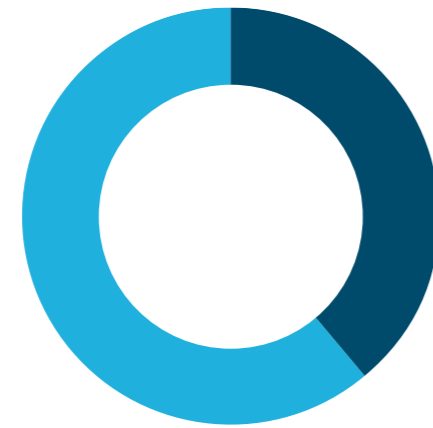
UK PLC



■ Belonging 63%
■ Non-Belonging 37%

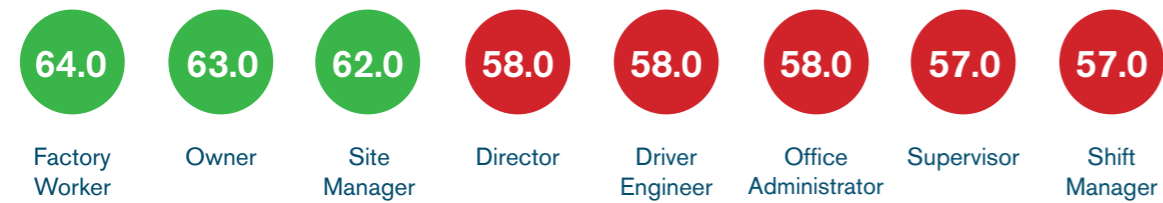
Figure 19

TSA Members



■ Belonging 61%
■ Non-Belonging 39%

Figure 20



The Brands with Values Belonging Score is an algorithm that calculates the distance between the Personal Values and Workplace Values, considering any potentially unhealthy sentiments respondents may select.

The overall Belonging Score for the laundry industry is slightly lower than the UK PLC at 61%. However, 61% is still defined as a good sense of Belonging, the Belonging Score differs across roles, with only Owners, Site Managers and Factory Operators rating Belonging at or just above the average score of 60%.

The greatest variance of Belonging exists when employees' responses are analysed by disability, which ranges between 46 and 63. Although age and sexual orientation show considerable disparity with a Belonging Score range of 12, the specific groups with the lowest score are individuals who identify as Bisexual (51), Gay or Lesbian (52) or who are 65 years and over (52).

These differences provide a vital insight for leaders who wish to engage all areas of their organisations, and shows that it may take time to fully engage with employees.



Appendix A: The response

This report was completed by 520 individuals. The following is a breakdown of the respondents by category and percentage.

Figure 21

Category	%	Category	%
Seniority		Age	
Factory Operator/Worker	19.8%	45-54	30.2
Office Administrator	17.1%	35-44	22.9
Site, General or Area Manager	16.5%	55-64	21.5
Driver/Engineer/Technical Support Roles	16.0%	25-34	18.3
Production Manager/Shift or Team Manager	11.9%	18-24	4.0
Supervisor/Charge Hand/Team Leader	10.2%	65 and over	1.7
Owner/Managing Director/CEO/Owner	4.4%	Prefer not to say	1.3
Company size		Ethnicity	
Over 500 employees	54.2	White/Caucasian	86.9
101-500 employees	30.2	Other	4.8
20-100 employees	12.5	Asian/Asian British	4.4
Under 20 employees	3.1	Prefer not to say	2.9
Place of work		African/Caribbean/Black British	1.0
South England (excluding London)	36.7	Disability	
Midlands	27.1	No disability	92.1
Northern England	15.8	Disabled but not registered in the UK	4.4
Scotland	9.0	Registered disabled in the UK	2.1
Wales	6.9	Prefer not to say	1.3
London	4.4	Sex	
Sexual Orientation		Male	57.9
Straight/Heterosexual	90.8	Female	41.9
Prefer not to say	5.2	Intersex	0.2
Bisexual	2.3	Gender	
Gay/Lesbian	1.2	Male	57.3
Prefer to self-define	0.6	Female	41.7
		Prefer not to say	1.0

Appendix B Methodology

The Brands with Values Culture Decoder has been used to create this study.

The Culture Decoder is a transformative culture diagnostic and people organisational tool based on the academic work of Shalom Schwartz. It has been used in over 200 countries and has been cited in thousands of academic papers.

How are the questions framed?

The Culture Decoder works by understanding the views of individuals, from their own unique perspective, as opposed to the perspective of the organisation they may be representing, regardless of the company values they may or may not experience.

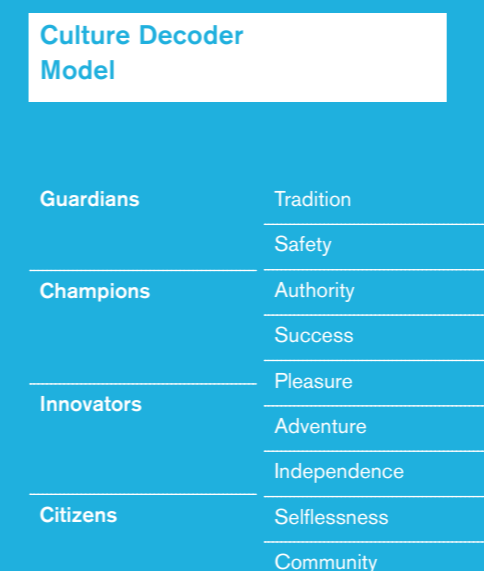
The word wall

Respondents are presented with a word wall of 81 sentiments for Personal and Desired Values and a further 18 sentiments for Workplace Values. Each word has been carefully selected to span a comprehensive spectrum of Intrinsic (common interest) and Extrinsic (self-interest) human values.

What values would you like to observe within the industry?

This question was designed for respondents to think about what they would like to see within their own industry and workplace.

Figure 22



The Brands with Values Culture Decoder Model is made up of four quadrants and nine categories.

Guardians, Champions, Innovators and Citizens have two categories. In addition, Champions and Innovators also share Pleasure, which sits between both quadrants.

Appendix C

The results

Figure 23

Personal Values

Top 10 Words	Category
Honest	Community
Friendly	Community
Loyal	Community
Reliable	Safety
Respectful	Tradition
Helpful	Community
Polite	Tradition
Dedicated	Community
Capable	Success
Independent	Independence

Figure 24

Workplace Values

Top 10 Words	Category
Friendly	Community
Challenging	Adventure
Demanding	Success
Respectful	Tradition
Safe	Safety
Successful	Success
Long-hours	Success
Clean	Safety
Dedicated	Community
Reliable	Safety

■ Potentially unhealthy values

Figure 25

Desired Values

Top 10 Words	Category
Successful	Success
Respectful	Tradition
Honesty	Community
Friendly	Community
Safe	Safety
High quality	Success
Enjoyable	Pleasure
Happy	Pleasure
Structured	Safety
Loyal	Community

Figure 26

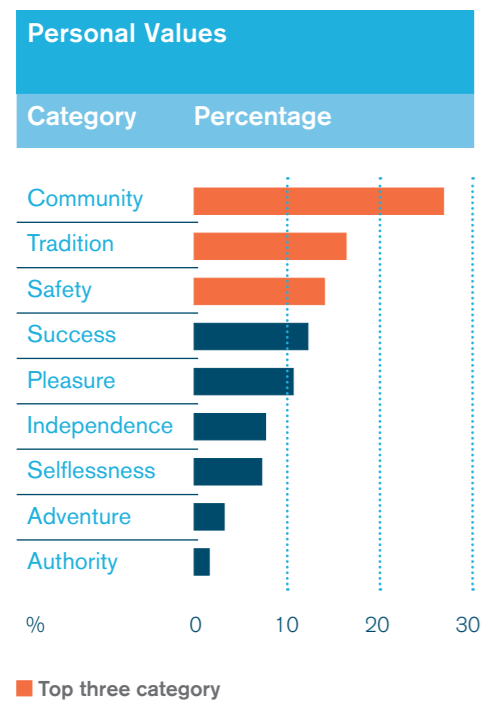


Figure 27

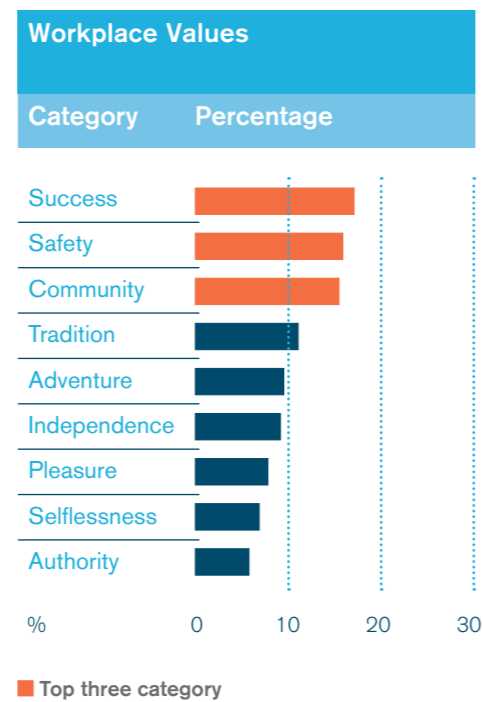


Figure 28

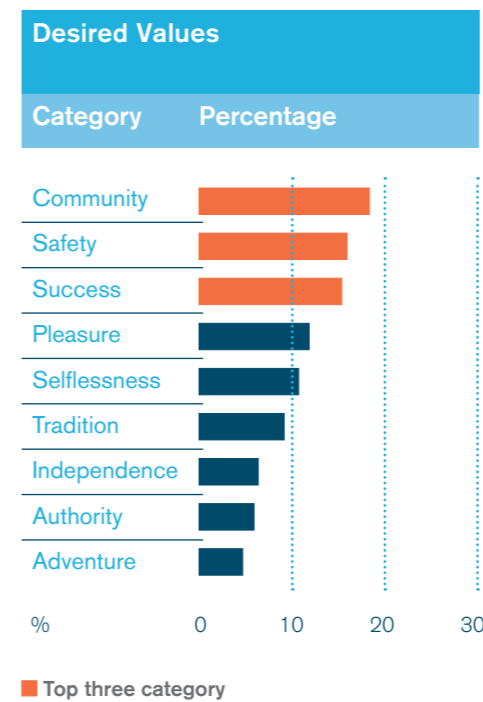


Figure 23

Top ten list of Personal Values words selected by all respondents.

Figure 26

Personal Values of all respondents.

Figure 27

Workplace Values of all respondents.

Figure 24

Top ten list of Workplace Values words selected by all respondents.

Figure 28

Desired Values of all respondents.

Figure 25

Top ten list of Desired Values words selected by all respondents.

Appendix D

Next steps

To learn how your organisation can benchmark its culture visit brandswithvalues.com

About us

Brands with Values is a culture auditing firm. We partner with organisations to measure, evolve and protect their cultures in order to sustain and transform commercial performance.

Our practitioners work across the globe to deliver culture strategies that give our clients the confidence to lead and act with integrity, earning the trust of employees, boards and wider stakeholders.

While we have pulled together some of the key themes, given the comprehensive data sets underpinning this report, there are other insights to share about the culture of The Textile Services Association Members. To learn more please get in touch with the report author:

Martin Roach
Founder, Brands with Values
martin.r@brandswithvalues.com

If you are interested in putting your culture at the heart of your inclusion and wider business strategy or to see how you benchmark, please get in touch:

Adrian Walcott
Managing Director, Brands with Values
adrian.w@brandswithvalues.com

+44 20 3627 0247

Copyright Brands with Values
2022 All rights reserved.





Brands with Values™
 Laundry Industry Culture Study
 2022

grow@brandswithvalues.com
 +44 203 627 0247

brandswithvalues.com

Textile Services Association
 Championing the Textile Services
 Industry

tsa@tsa-uk.org
 +44 20 3151 5600

tsa-uk.org

Brands with Values™

