together we rise
Resetting, restoring and revitalising healthcare retail food services
Sodexo has been at the forefront of the coronavirus (COVID-19) response since it first emerged in Wuhan, China in December 2019. We have worked closely with our clients to implement our pandemic and business continuity plans and to share the learnings from our teams in China and around the world.

In March, we saw the initiation of the fastest and most far-reaching repurposing of NHS services, staffing and capacity in its 72-year history. Thanks to the dedication of everyone who works in and around the NHS, every COVID-19 patient needing hospital care, including ventilation, has been able to receive it.

COVID-19 looks set to be with us for some time to come and the pressure on Healthcare workers will remain unprecedented. They will need enhanced and active support to ensure their wellbeing and safety.

As the narrative turns to the re-set and reconfiguration of healthcare services and facilities, our clients and consumers naturally look to us for support and solutions. We have worked hard to ensure that our teams have the right tools, information and best practice guides to ensure that we can safely provide food and drink to deserving Healthcare workers; keeping them nourished and cared for during this difficult time and into the new normal.

There are still many unknowns, but one thing is for certain, the reset and reconfiguration programme will require a truly collaborative approach. At Sodexo we pride ourselves on strong client relationships and committed teams. These relationships will help us all to navigate the challenges ahead and find solutions as long-term strategic partners.

Dev Dhillon
Retail Director
Healthcare
Sodexo UK & Ireland
CONSUMER TRENDS AFFECTING THE HEALTHCARE RETAIL EXPERIENCE

“Consumers are increasingly adapting to their new way of life and look to build positive habits for the future. More time spent at home has led to new buying habits and changing consumer preferences.”

Emma Minkoff | Insight Executive | Costa Coffee
Many consumers are turning to immunity-boosting foods and supplements in a bid to ward off the virus. There has been a surge in demand for vitamin C, D and zinc. More than 8/10 people are actively trying to improve their health through a variety of diet and exercise; a rise in the number of people switching to plant-based diets is evidence of this. We should expect our consumers to want to see these products in our outlets.

Whether our guests are physically, mentally or economically stressed, food and drink are a comfort and reward. Our responsibility is to refuel healthcare workers and minimise their stress in challenging circumstances. Offering sustenance and value is key but we can’t forget the importance of small joys for those consumers who want to treat themselves.

The use of digital ordering and cashless payments has accelerated during the pandemic and this will become the norm. Digital applications are a smart way to limit infection exposure while enhancing the personal experience. We will support the continued migration over to a cashless payment system whilst supporting vulnerable patient groups.

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Consumers will expect to see safety measures in place to enforce social distancing. They will have a heightened sense of what they view as food safe handling practices and an increasing desire to know where their food has come from and how it has been handled. We need to provide visible evidence of cleanliness, disinfection and physical distancing.

Consumers have seen organisations’ pandemic response as a way of contributing to communities and the public good. As the pandemic subsides, their focus is likely to quickly shift to other uncertainties and safeguarding issues such as climate change.

Acting on insight

**HARVARD UNIVERSITY**

say that 8 in 10 people think physical distancing is helping to slow the spread of the virus

**OMNICO GROUP**

say that 58% of employees would more frequently visit outlets in their workplace if they could order ahead or pay via apps

**JUST EAT**

has seen a 36% rise in desserts

**HEALTHSPAN**

supplement firm saw a 300% increase in sales between 19th and 26th March

**BEYOND MEAT**

a plant-based meat substitute brand saw stock jump over 85% between mid-March and early May

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**Reassuringly safe**

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**Advancing a no-touch world**

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**Revitalising and energising guests**

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**Health boost**

Many consumers are turning to immunity-boosting foods and supplements in a bid to ward off the virus. There has been a surge in demand for vitamin C, D and zinc. More than 8/10 people are actively trying to improve their health through a variety of diet and exercise; a rise in the number of people switching to plant-based diets is evidence of this. We should expect our consumers to want to see these products in our outlets.

**Resetting sustainability**

Whilst personal safety is currently at the forefront of consumers’ minds, we do not expect them to ditch their eco concerns. We’ll inevitably see a rise in the use of disposable packaging as a safety measure - something we’ve all been doing our best to reduce. Where safe and appropriate to do so we’ll make sure that packaging choices are the most sustainable they can be. Consumers have seen organisations’ pandemic response as a way of contributing to communities and the public good. As the pandemic subsides, their focus is likely to quickly shift to other uncertainties and safeguarding issues such as climate change.
"My team has risen to the challenge. In a short space of time we've completely changed the space we work in and how we interact with each other and our guests. Sodexo has provided the tools and guidance necessary to maintain the highest level of safety to our employees, NHS colleagues and our guests."

Phil Winlow | Senior Retail Manager | Royal Stoke University Hospital
Physical distancing has become a routine part of day-to-day operations. Sodexo has risen with confidence and made changes to improve the health and wellbeing of everyone we serve, including our own employees. Our risk analysis identified those changes that will have the biggest impact; keeping people safe and the facility operating as optimally as possible.

To help manage people’s behaviours and build confidence, we’ve:

• Adapted queue protocols and the guest flow
• Increased availability of hand sanitisers
• Displayed the new etiquette required by our guests
• Added physical barriers at dwell points and till points
• Removed all self-serve buffets and open food
• Removed or limited the available seating
• Moved to single use serviceware
• Removed napkin or condiment dispensers

Supporting physical distancing
The world as we knew it has changed in previously unimaginable ways. The pandemic has driven new consumer behaviours with a considerable impact on food and retail. Whilst some consumer behaviours will return to pre-covid norms, the psychological effect of the crisis is likely to linger resulting in certain trends being accelerated and habits that are here to stay.

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A restaurant’s food safety will matter more</td>
<td>76%</td>
</tr>
<tr>
<td>I’ll avoid crowded places even when the government says it’s safe</td>
<td>69%</td>
</tr>
<tr>
<td>I’ll avoid self-serve buffets and salad bars</td>
<td>66%</td>
</tr>
<tr>
<td>I’ll stick to the familiar and not try new restaurants or dishes</td>
<td>52%</td>
</tr>
</tbody>
</table>
Moving to a cashless operation

Removing cash where we can protects our employees and our guests from cross contamination. It also speeds up the transaction process and minimises the risk of queues developing.

All food options are pre-packaged and Grab & Go

Sealed and safe food options create a contactless experience, without sacrifice. Whether craving comfort food, adventurous flavours or healthy meals and snacks, we have options available all day.

Using digital technology to limit exposure and enhance convenience

Our BITE applications allows our guests to order and pay for their food and drink and collect at a time of their choosing. To increase engagement and offer value - menus, nutritional information and loyalty reward programmes are built into the application too.

Delivering the food you want, when you want it

We appreciate that healthcare workers are time poor. Breaks don't happen to a timetable and it’s not always possible to get to retail locations in the time available; especially if infection prevention and control restrictions limit movement. Products need to be brought to the consumer. There are a number of ways we do this:

• Vending ensures access to hot and cold food and snacks, as well as convenience items, 24 hours a day and seven days a week.
• Autonomous machines can make salads, smoothies and barista drinks
• A trolley service, or even a delivery robot, can deliver directly to wards and departments. We can even place your order in temperature controlled lockers for collection later.
• To avoid missing out on a café or restaurant experience, we can bring these experiences to you with a smaller 'pop-up' café, convenience store or restaurant.

Delivering the food you want, when you want it
rise with sodexo

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