



Fuelling the return:
New food services for
a new world of work



VITAL
SPACES

*sodexo**

FOODCONNECTION

Introductions



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“ We have a once-in-a-lifetime opportunity to reinvent the workplace. Things that might once have seemed impossible have proved surprisingly workable.

With collaborative productivity essential to innovation, the changes will enable companies to become more competitive. And given employee desires for flexibility, the changes will also allow companies to recruit and retain the best talent.”

- [Boston Consulting Group](#)

Accelerating trends in workplace



WFH is here to stay, so is the office and hybrid models



Real estate portfolios must evolve, be flexible



Organisations re-designing the future of work



Employee value propositions, behaviours and needs



Economic recovery will vary by Region and Sector

- 
- + Demand for food remains, just different and more flexible
 - + FM is strong and evolving; redesigned, better-managed workplaces to improve productivity culture and connectivity
 - + Increased demand for workplace services
 - + Safety, wellbeing and CSR need to be highly visible

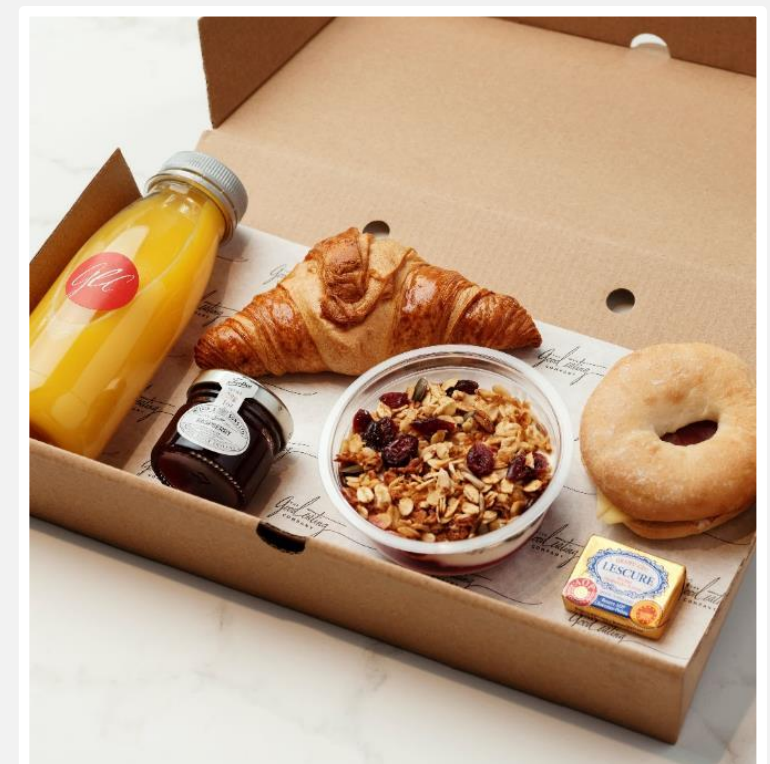
The worklife evolution



Employers want to keep employees onsite to boost productivity and safety



Employers and employees see quality food as an important benefit to talent recruitment and retention



Worklife demands more flexible food options

Human value shifts

The changes we see in the workplace can be contextualised in terms of a bigger human value shift **toward real human empowerment.**

Liberalised Global Culture

YESTERDAY'S VALUES
< 1980s–2000s >



LIFESTYLE CONSUMERS

My individual lifestyle choices

Platform Culture

TODAY'S VALUES
< Late 2000's–Now >



EMPOWERED CONSUMERS

I want convenient choices with experiences individualised to me

Emerging Culture

EMERGING HUMAN VALUE SHIFT
Future 2030+



EMPOWERED HUMANS AND COMMUNITIES

I want to shape my life, my communities and lived environment to regain access to Quality of Life

New priorities at work

Optimised Spaces



Productivity and Top Talent



More Spaces for Collaboration

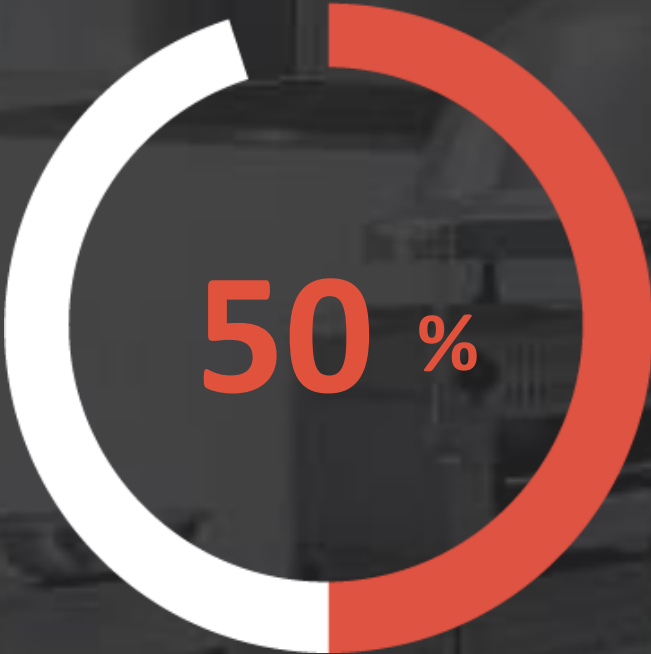


Health & Wellbeing



Sustainability and Purpose

What are people looking for from their workplace lunch?



of people expected to use workplace dining with the same frequency. But 45% said they would use it less

What are you looking for from workplace dining facilities?

Tasty Food

66%

Value for Money

58%

Speed

47%

Convenience

46%

Safety

40%

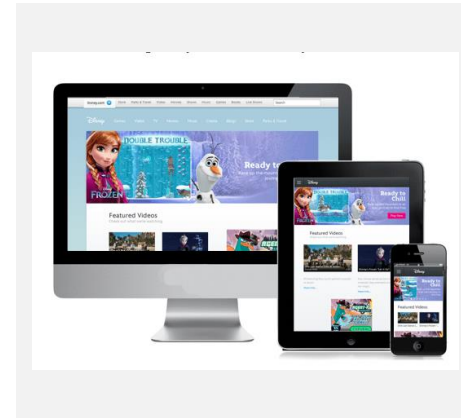
Taking inspiration from consumer sectors



+ Frictionless/
Hyperconvenience



+ Flexibility




+ Omnichannel



+ New styles of
production


Three guiding pillars of our Sodexo food transformation

Digital




1

Convenience



2

Production



3

Partnerships for success



dynamify

12

Digital Order & Pay at
Skip the lines, earn rewards, and avoid contact!

First hot drink free

Every 9th hot drink free

Once you've downloaded the app, scan this QR code to access Morgan Stanley:



Search for the 'Twelve by Sodexo' app

Available on the App Store | Available on Google play | Available on the Web



fooditude
FEED YOURSELF HAPPY

FEED YOUR TEAM
HAPPY



An agile, progressive approach: food connection ecosystem

Employees working onsite, from home or a third place

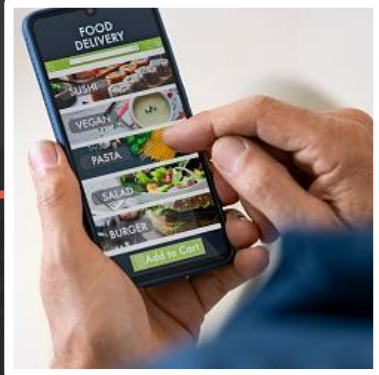


Food-first approach that gives consumers just the food they want, when and where they want it



Reimagining, reducing and reallocating space to where it can do the most good

Multiple formats – service wherever and whenever needed



Technology, machine learning and analytics to optimise operations and experiences

Agile, hybrid approach that seamlessly integrates onsite food spaces



“

Evolved leaders will bring a spirit of innovation to their employee engagement and wellness initiative and give them the same energy and care as their core products and services.

Employee engagement and wellness are about protecting your human capital, your most valuable asset. Organisations that ensure their employees flourish and thrive will always be ahead of the curve.

- Forbes

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Thank you