

TAF TALKS 2020 REPORT

THE DEFINITIVE GUIDE TO FOODSERVICES FOR FACILITIES (AND CATERING FOR THE POST COVID-19 CUSTOMER)

21st October 2020



“And a delightful thing is to see a town full of people again, as now it is. Shops begin to open, though in many places, seven or eight together and more all shut, but yet the town is full compared with what it used to be.

SAMUEL PEPYS | 5th Jan 1666”

Above: An excerpt from Samuel Pepys' Diary relating primarily to his account of events surrounding the so-called Great Plague of London which began in 1664 and was interrupted by the Fire that destroyed much of the City of London in September 1666.





Dear Reader

I took the decision to compile this report following many searching questions from facilities clients during these concerning and worrying times.

In fact, Alex and I have taken time out, these last few weeks, to follow the news, read numerous market reports (including Mintel's latest on foodservices), survey the foodservice sector (and without catering), engaged many third parties and even out as much as possible.

I then started with the post pandemic outbreak customer, who's transformed because of the pandemic (thus the quote from Samuel Pepys) and considered there has to be a way to come through this - fit for the needs of you.

This report presents our findings, following hours of research, to help you consider how you can adapt, evolve and create post-COVID-19 foodservice solutions through fresh, forward thinking.

We hope we have helped you do this!
Best Wishes Tracy

CONTENTS

05 Contents *	06 Acknowledgements *	07 Foreword *
08 Introduction *	09 COVID-19 Timeline *	10 Executive Summary *
11 Customer Insights *	21 Foodservice Innovations *	49 Foodservice Future Focus *
60 Your Notes *	65 Next Steps *	66 References *

ACKNOWLEDGEMENTS

We would like to thank *our sponsors, Romy Foods*, without whom, putting on the round table event to present this report to our facilities' clients, would not have been possible. We also thank those we highlight as our post COVID-19 foodservice heroes: **Johnny Millar Photography**, one of the UK's *best portrait photographers*, for our fantastic cover shot (Johnny Millar), **Fashionizer Face Masks**, our *face masks of choice* (Debbie Leon), **Tipsy Food Company**, our *local F&B drinks brand* (David Gillott), **ABDA Design**, our *catering interiors of choice* (Claire Smith), **Buzz Production**, our *bespoke kitchen accoutrements supplier* (James Fairclough), **Chris Moore**, our *local charity of choice* (The Clink Charity) and all the caterers, consultants and clients we have engaged with, without whose input we would not have been able to present a realistic view of the world of foodservices in the UK today.

FOREWORD

- TAF is a dedicated foodservice catering consultancy operating in the Business and Industry (B&I) corporate workplace foodservice sector. Facilities clients approach TAF in search of *fresh, forward-thinking, innovative, app-savvy and sustainability focused solutions*.
- We offer a disruptive approach, more so than other catering consultancies (or so we're told) and have consulted, in the last 18 months, for global legal, insurance, technology, financial and business software corporations, as well as an international conference centre.
- We deliver on our promises to *listen, collaborate and deliver* foodservice solutions, so our clients can control their catering and foodservices more effectively. We are dedicated to UK foodservices and to share our unique market insight and intelligence, drawn from over 50 years' collective experience in Foodservices, Sales, Marketing and Customer Engagement.
- We aim to deliver fresh, independent, non-bias reports containing the most relevant, reliable and timely information around: catering audits, catering design, customer engagement, catering tenders, catering benchmarks, digital engagement and market research.
- With market research in mind, in the aftermath of UK lockdown, in a new post-pandemic COVID-19 climate, "the customer" has changed and foodservices have transformed beyond recognition. Having listened to the market, collaborated with caterers, consultants and clients, this report is our definitive guide, to those seeking to control their foodservices beyond 2020, as is TAF's client and industry round-table event in October 2020.

Our consultants:

Tracey Fairclough | Managing Director



Tracey set up TAF Catering Consultancy in November 2018 to create a catering consultancy with a fresh approach for corporate clients in facilities: 100% independent, a safe reassuring collaborative pair of hands and specialist expertise, according to the needs of each client brief.

Tracey is a Member of the Institute of Hospitality, Institute of Workplace and Facilities Management and Association of Catering excellence. She speaks at events, judges at industry awards and has had numerous articles published in the industry's press, especially throughout lockdown (including in Hospitality and Catering News and in Facilitate Magazine).

A hospitality professional with senior management experience twinned with an award-winning 16-year background focused on customers (engagement, marketing and branding) means that Tracey has provided unique customer insight in these post COVID-19 times, which is paramount, given the transformation of customer preferences and behaviours today.

See bio at <https://uk.linkedin.com/in/traceyfairclough>

Alex Mingoni | Consultant



Alex joined Tracey at TAF Catering Consultancy in June 2019, bringing with her 10 years of operational experience in hospitality and events; having worked for small, medium and large UK contract caterers.

Alex's background is actually "people" based, drawing from Human Resources Practice with a track record in recruitment, on-boarding, employee relations management, learning and development. She is qualified in Human Resources Practice and a member of the Chartered Institute of Personnel and Development (CIPD).

A human resource professional with a background uniquely focused on people engagement means that Alex has effectively drawn, from the 40 caterers in TAF's network, today's best practice in foodservices, which lead to an unprecedented 360-degree market insight on UK foodservices that have transformed beyond all recognition post COVID-19.

See bio at <https://www.linkedin.com/in/alessandramingoni>

INTRODUCTION

- TAF Catering Consultancy has observed COVID-19 unfolding, more notably during these last 6 months and the impact it has had on corporate workplace foodservices.
- **We have networked with 40 caterers and a similar number of corporates, amassed data, insight and best practice and, having sought out MINTEL*¹'s latest insight, now share our view of the world of foodservices to help support clients and prospective clients post COVID-19.**
- In terms of recent positive developments, firstly, the government's Eat Out to Help Out scheme helped to kickstart the hospitality industry with consumers incentivised to visit these venues for a meal during August 2020 (Mondays to Wednesdays). Secondly, the VAT cut on food and non-alcoholic drinks helped keep prices down to ensure more foodservice businesses stay afloat.
- With working from home looking set to remain the norm, into the foreseeable future, on-site staff restaurants, sandwich shops, delis, food-to-go and hospitality will continue to be affected by reduced on site office working populations.
- This presents a challenge to those in facilities whose responsibility it is to feed those who matter the most to their business, and UK economy.

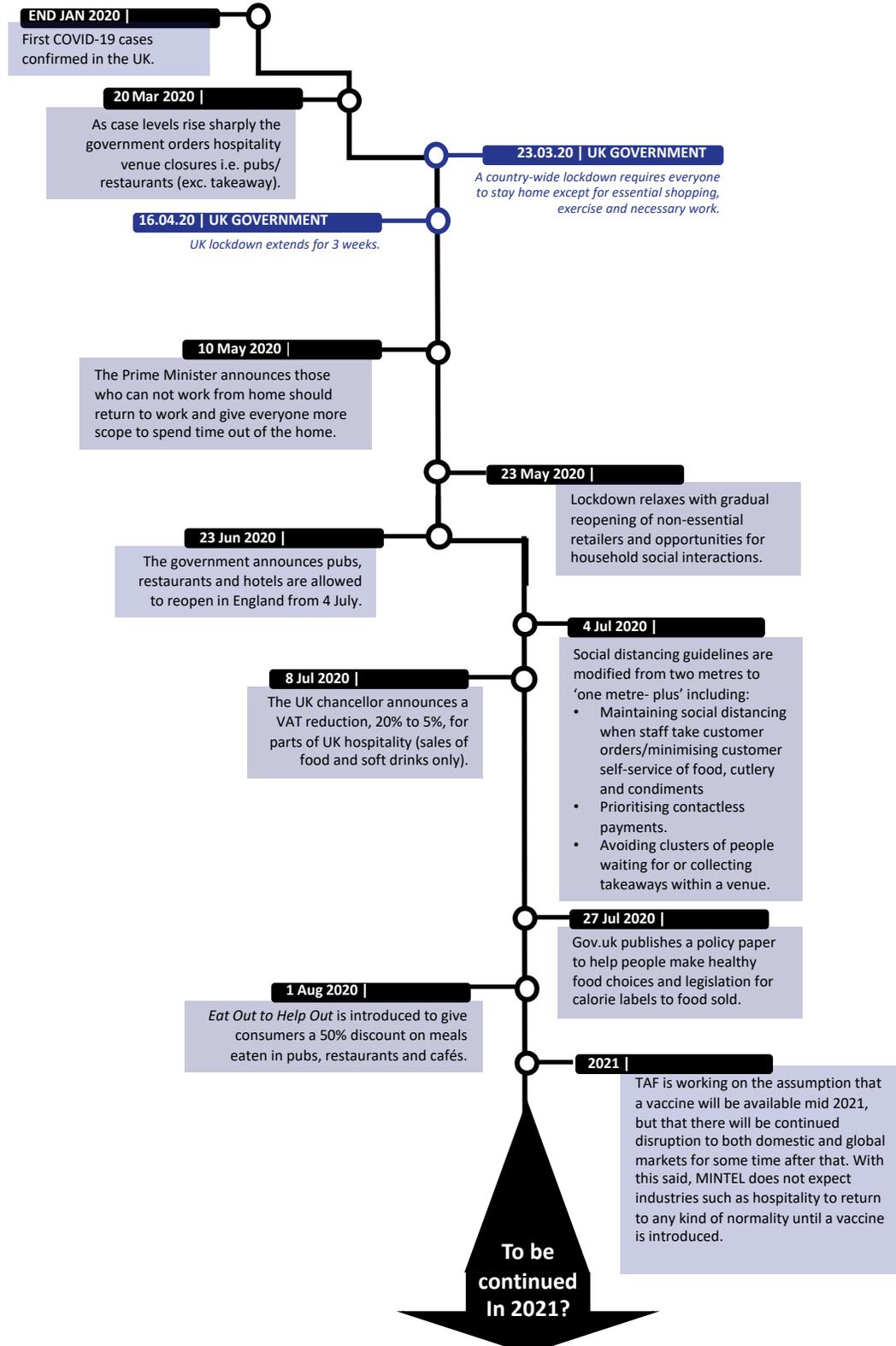
COVID-19 has accelerated the evolution of innovation around foodservices to deliver food and drink to consumers differently and this report seeks to present how the market has changed, how the consumer has changed and what innovations should inspire a new wave of foodservices feeding those in the workplace – at in the office or at home.

- According to MINTEL, the report on which our report defer to, at the start, the eating out market proved resilient after the last recession, its value increasing by circa. 7% between 2007 and 2012. As eating out remained a top consumer spending priority (after bills), foodservices benefited as consumer confidence recovered.

- **Key issues covered in the MINTEL Report**
- The impact of COVID-19 on the foodservice sector, with a focus on consumers' eating out decision-making process, consumers' home delivery/takeaway habits and how these are impacted by the COVID-19 outbreak, improvements that consumers would like to see made to foodservice venues and their food offerings and consumers' attitudes towards the value and quality of eating out of home.
- The scope is the UK eating out-of-home market. Mintel's UK foodservice market size is based on consumer expenditure on food and drink in pubs/bars, restaurants, coffee shops, hotels (bars, restaurants and room service), roadside outlets/service stations and street food stalls/food courts.
- The attitudinal report explores eating out habitual usage and frequency of visits, changes in usage resulting from COVID-19, interest in menu features and potential opportunities around advanced technologies, as well as selected foodservice operator initiatives, such as product, venue development and marketing activities.
- **Starting With Why | Inspired by Simon Sinek*²,**
- According to Simon, we face a new era of radical uncertainty and disruption brought about by the ongoing COVID-19 pandemic, as well as climate change, financial crises, terrorism, Brexit, demographic changes in the labour market and rapid transformation from digital technology.
- He says COVID-19 is a black swan event: an unpredictable event beyond what is typically expected of a situation with potentially severe consequences, being extremely rare and having a severe impact. **An event forcing companies and entire industries to rethink their global supply chain models.**
- TAF focus on the customer (as a workplace foodservice employee) and explore what's going in their minds today to: (a) learn best practice on leading/adapting during disruption, (b) understand how to adapt foodservices around them, (c) build trust to help them accomplish during challenging times, (d) improve critical workplace relationships to achieve results, reflect, rebuilt and reassure after the crisis, and (e) deal with the black swan better - ensuring workforces are better fed, anywhere, anytime, as the most valuable asset of any organisation is its workforce and each and every employee.



COVID-19 FOODSERVICE TIMELINE



EXECUTIVE SUMMARY

“Eating out will become more of a treat giving an opportunity for foodservice venues to create more premium options to fit special occasions. But first, an effective response to COVID-19 is required to safeguard the future of eating out. The virus should be the catalyst for the adoption of new technology across the industry to build hygiene defences and drive long-term sustainability. MINTEL”

1, CUSTOMER INSIGHTS | *What today's customer looks like ...*

Firstly, we discuss the CUSTOMER (your employee), their hopes, fears and aspirations TODAY, in a whole new world post COVID-19.



We highlight **13 Customer Insights**: (1) Mind Body Wellness, (2) Quality vs Pricing, (3) Safety | Top of Mind, (4) Cashless Payments, (5) Tech Today, (6) Experiences & Online Experiential, (7) Rise of the Ready-Meal, (8) Eating Out Resurgence, (9) Treating Out, (10) Townie Takeaways, (11) Couples Catering, (12) Fast Food Gen-Zers and (13) Pizza Weathers Storm.

2, DISRUPTIVE INNOVATIONS | *How today's contract catering has been disrupted...*

Secondly, we assess FOODSERVICES, in contract catering and the workplace TODAY, looking at who is disrupting, how and why, in a whole new world post COVID-19.



We highlight **10 Disruptive Innovations** as best practice: (1) AI Fresco Dining, (2) Dark Kitchens/CPU's, (3) Experiential Marketing, (4) Grocerants, (5) Micro Markets, (6) Meal Kits/Ready-To-Cook, (7) Pop Up Catering, (8) Simplified Menus, (9) Desk Delivered and (10) Foodservice Collaborations.

We were inspired by the resilience, determination and commitment of the contract caterers we know who have adapted and evolved the best client solutions, some working tirelessly (and operating throughout) to plan, develop and deliver best-in-class solutions to meet the evolving needs of the post COVID-19 workplace.

This section of the report summarises our research and gather process, face to face conversations, phone calls, zoom meetings and independent analysis of the latest market intell and foodservice industry news.

3 significant developments are: (1) **Flexible Catering Provision** featuring an adapted service delivery model - more grab & go, reduced on-site teams, simpler menus, immune boosting good eating and product innovation, (2) **Delivered-In Models** featuring dark kitchens and third-party partnerships to diversify catering offers, pre-bookings via dedicated apps and on-site delivery to suit customers and (3) **App Technology** featuring pre-order, pre-pay, desk drop, restaurant collection bookings, menus, allergen information, marketing, loyalty and promotions.

3, FUTURE FOODSERVICE FOCUS | *And on to digital transformation...*

here we conclude by identifying an OPPORTUNITY for UK facilities to cater for the post COVID-19 customer and by highlighting: (A) **App Tech Disruption** and ask if the right app technology is in place and (B) **Techdine Disruption** and ask UK facilities to prepare for a new way of thinking, turning the traditional contract catering model on its head. *Why?* There is a new way to flexi-feed workforces (and our economy) 24/7 at work and at home, a way our counter-parts in the rest of the world are already going based on **disruptive innovation, restaurant quality food, unique packaging, no food waste, strategic marketing and reduced costs.**

PART 1 | 13 CUSTOMER INSIGHTS

What today's customer looks like...

13

This section is where we first understand the **CUSTOMER** (your employee), their hopes, their fears, their aspirations TODAY, in a whole new world post COVID-19.

1. Mind Body Wellness
2. Quality vs Pricing
3. Safety | Top of Mind
4. Cashless Payments
5. Tech Today
6. Experiences & Online Experiential
7. Rise of the Ready-Meal
8. Eating Out Resurgence
9. Treating Out
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12. Fast Food Gen-Zers
13. Pizza Weathers Storm



CUSTOMER PROFILES

What today's customer looks like...

MINTEL's respondents are clustered into three groups, providing insight for workplaces to focus on how their shared attitudes could impact eating (out of home) decision-making.

Typical characteristics of each group

Group 1 | Engaged Diners – 38% of Britons

- This group makes up the largest portion of consumers. Women (43%), 16-44 year olds (46%), full-time students (56%) as well as those living with parents/family members (52%).
- Engaged Diners are most likely to engage with foodservice brands in **fun and interactive ways, such as watching cooking videos by their favourite chefs** and participating in online cooking lessons or drink making sessions.
- Menu choices reflecting Engaged Diners' attitudes should include **food and drink pairing options and a wider range of snacks/appetisers with mains.**



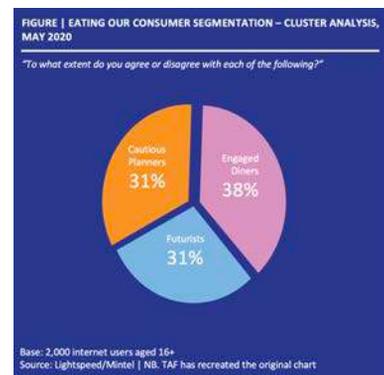
Group 2 | Futurists – 31% of Britons

- This group comprises men (35% vs 27% of women) and 16-44 year olds (35% vs 27% of over-45s).
- While Futurists don't need foodservice brands to remind them about measures taken to manage the risk of COVID-19, they expect brands to be more innovative instead; shaping a pragmatic future of dining that **uses new technology to drive safety and sustainability.**
- Futurists are **most likely to embrace new ideas including automated/robotic systems in foodservice.** Menu choices that reflect Futurists' attitudes should include greater meat-free options.



Group 3 | Cautious Planners – 31% of Britons

- Nearly half of empty nesters (46%) and over-45s (43% vs 19% of 16-44 year olds) fall within this group.
- The stark difference between Cautious Planners and Engaged Diners is that the former are most likely to support contact-free payment and delivery methods for the sake of hygiene, which ties in with Mintel Trend Prepare for the Worst.
- When marketing to Cautious Planners, **communication should reinforce food safety initiatives and ensure that the food served comes from places that follow strict food safety standards.**



01 MIND BODY WELLNESS



70% of Britons are prepared to make short-term sacrifices for long-term health. Food and drink that promote relaxation and boost the immune system drive decision making among 16-34 year olds. 16-24 year olds are driven by benefits to help manage weight and boost energy levels.*

1. With vast numbers of people falling ill from COVID-19, the notion healthy diets bolster good health and wellbeing is prevalent, and more consumers use foodservice to support health. *For example, the NHS weight loss plan, a free 12-week diet & exercise plan, via app/PDF that innovate around take-away/home delivery meals.*
2. Consumers today are now treating their bodies like an ecosystem, seeking solutions to complement their personal health.
3. Gen-Zers dining habits will influence healthier snacks/appetisers, as they have emerged as the group leading the charge towards healthier food and drink choices, including veganism.
 - **TAF Talks:** Given younger employees are spending more time at home, operators should support their wellbeing and lifestyle needs, providing home deliveries featuring energy-boosting drinks, light meals, meal kits and immune and brain boosting menu plans.

* MINTEL Survey, Future of Eating Out, August 2020

TABLE 1: IMPORTANT FACTORS FOR MAKING DECISIONS ABOUT EATING/DRINKING, BY DAYS OF THE WEEK USAGE FOR TAKEAWAY/HOME DELIVERY SINCE THE START OF THE PANDEMIC, MAY 2020

"Since the start of the COVID-19/coronavirus outbreak, which factors have had the most influence on what you decide to eat/drink? Please select up to 3".
"Since the start of the COVID-19/coronavirus outbreak, when have you ordered takeaway/home delivery? Please select all that apply".

	Total	Mon -Thurs	Fri	Sat	Sun	Don't know/can't remember
Total	N=1,174	N=294	N=406	N=444	N=164	N=318
A treat	43%	56%	49%	50%	49%	32%
Helps me relax	24%	27%	31%	29%	27%	16%
Helps manage my weight	23%	26%	27%	23%	20%	19%
Boosts my energy levels	18%	19%	19%	20%	19%	17%
Boosts my immune system	17%	13%	18%	14%	24%	19%
Helps me focus	12%	9%	14%	13%	16%	10%
Improves quality of sleep	11%	11%	10%	10%	16%	9%
None of these	22%	15%	16%	18%	14%	35%

Source: Lightspeed/Mintel
Base: 1,174 internet users aged 16+ who have ordered a takeaway/home delivery since the start of COVID-19/Coronavirus outbreak

02 QUALITY vs PRICE

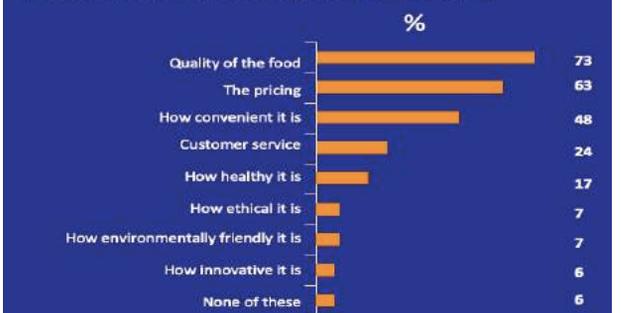


Of takeaway/home delivery consumers:

- 73% prioritise *quality* of food
 - 66% of Britons have a budget they try to stick to as much as possible.
 - 63% value *pricing* as second most important priority in choosing where to order from.
 - 62% of Britons think it's worth paying more for higher *quality* products.*
1. Most consumers are mindful of their spending, which will have a profound impact on eating out choices, as consumers seek to stretch budgets further while looking for trustworthy products and services that reduce the risk of illness.
 2. As consumers span across the price and quality spectrum, the midmarket will be a tough place to be for foodservice providers.
 3. Tiered pricing strategies will be key across value menus and core products catering to cost-conscious consumers.
 - **TAF Talks:** The midmarket will be a tough place to remain for the uncertain future so foodservice operators will need to innovate their way out of the "squeezed middle" which is where tiered pricing will be key and more obtainable for them than their high street counter-parts, hanging their hats on one food category.

FIGURE A | PURCHASE DRIVERS FOR TAKEAWAY/HOME DELIVERY FOOD, MAY 2020

"When choosing where to order takeaway/home delivery food from, WHICH OF THESE FACTORS do you usually prioritise? Please select all that apply."



Base: 1,174 internet users aged 16+ who have ordered a takeaway/home delivery since the start of COVID-19
Source: Lightspeed/Mintel | NB. TAF has recreated the original chart

03 SAFETY | TOP OF MIND



46% of Britons strongly agree that it's important their food comes from places that follow strict food safety standards (rising to 51% of over 45s vs 41% of 16-44 year olds) so marketing messages need to assuage fears of infection among all consumers. 72% of 16-44 year olds agree restaurant/delivery services should continue to offer 'contact-free' delivery after the COVID-19 outbreak.*

1. More consumers stay at home, the definition of convenience has changed and operators must bring trustworthy/functional products/services that reduce the risk of illness to customers.
2. COVID-19 has forced consumers to change eating out habits, low levels of risk experiences in 2020.
3. As consumers become increasingly driven by risk avoidance, they will look to reduce uncertainty in their purchase decisions.
4. Transparency and trust in food safety is more important than ever. Promotions must be based on safety measures ie. "Test and Trace".
5. For older consumers, convenience needs to be centres on food safety and hygiene.
 - **TAF Talks:** Operators should innovate around safer ways of takeaways/home delivery to improve customer confidence.

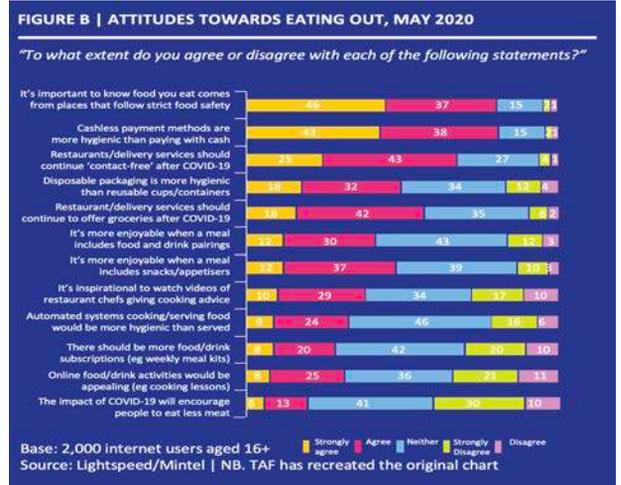
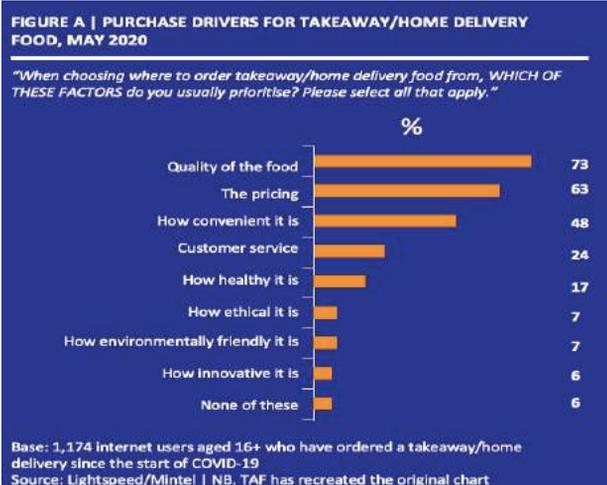
* MINTEL Survey, Future of Eating Out, August 2020

04 CASHLESS PAYMENTS



82% of Britons agree cashless payment methods are more hygienic than paying with cash. Increased concern about hygiene during COVID-19 has accelerated the shift away from coins and notes, paving the way for cashless paying methods.*

1. What started out as a payment method, focused on improving the speed of service and accuracy of transactions, is now the practical solution in reducing the spread of the virus.
2. The end of coins and notes drives further adoption of cashless payments across all ages.
3. Mintel identifies *Seamless Spending* as the trend where new payment technologies have made it easier than ever to spend money.
 - **TAF Talks:** Given new payment tech has paved the way, organisations wishing to feed people at home should cast their minds and contractors back to luncheon vouchers and apply to the modern employee needing feeding at home.



05 TECH TODAY



Robots and AI will allegedly replace some restaurant jobs in a post COVID-19 market, as 32% of Britons agree that automated systems that can cook/serve food would be more hygienic than food cooked/served by humans, especially Gen-Zers (50%). While technology cannot replace the human touch, the hygiene aspect of it will sway more consumers to embrace robotics and automation in foodservice in the future.*

1. Restaurant Business Online⁴, reports mobile ordering and payments have been on the rise for a long time.
2. In the aftermath of COVID-19; the rise of digital channels have transformed our ability to order and pay for food whilst giving foodservice operators access to all important sales and customer data (in reducing costs).
3. When the pandemic hit, digital channels became a way to order and pay and the safest channel; involving little to no human contact in a world ruled by social distancing. What coronavirus has achieved: it's collapsed the technology adoption curve. We are there.

4. Digital consultancy, Mobiquity, analysed circa 100,000 reviews of apps in Apple's App Store during COVID-19 and found an increase in reviews including the words "first time," indicating COVID-19 and ensuing lockdowns are driving users.
5. As users flocked to apps, ordering and payment foodservice companies started rolling out bespoke updates tailored around a climate of growing concern around safety, fine-tuning contactless pickup capabilities, allocating designated pickup areas in restaurants, and allowing customers to scan QR code to view menus and order on their phone (without having to download an app).
6. Irrespective of what happens next, vaccine (or no vaccine), it's likely the shift to mobile channels (app and/or contactless ordering platforms) are here to stay after the pandemic subsides.
7. On account of customers' behaviour having changed, with most having seen the benefits, whilst some will return to more traditional ordering methods, a large proportion of people will never want to go back to dealing with a credit card or handling the menu.
 - **TAF Talks:** Operators should innovate around safer ways of takeaways/home delivery to improve customer confidence and, as such, we've included a separate section on the apps available.

* MINTEL Survey, *Future of Eating Out*, August 2020

06 EXPERIENCES & ONLINE EXPERIENTIAL



71% of people say experiences are more important than possessions. 33% Britons agree online food/drink activities appeal (rising to 53% for Gen-Zers). 39% Britons agree it's inspirational to watch videos of restaurant chefs giving cooking advice (rising to 50% 16-34 yr olds). 28% agree there should be more food/drink subscriptions (meal kits).*

1. Small expenditures involving social interactions such as dining out or meeting loved ones for snacks/drinks are enjoyable and fulfilling ways to relax, unwind and create lasting memories.
2. A new wave of virtual activity has emerged from COVID-19 to supercede traditional marketing.
3. With high street foodservice operators forced to online events as face-to-face became impossible during lockdown, brands could reach wider audiences, brand awareness and ecommerce.
4. Meal kit subscriptions are attractive to consumers eating out less but want to cook high quality convenient meals at home.
 - **TAF Talks:** Subscriptions to food-centric online activity can provide regular revenue streams to offset an uncertain dine-in staff restaurant trade whilst also be a way to engage the people that work for you, unique to your company's culture.

* MINTEL Survey, Future of Eating Out, August 2020

07 RISE OF THE READY-MEAL

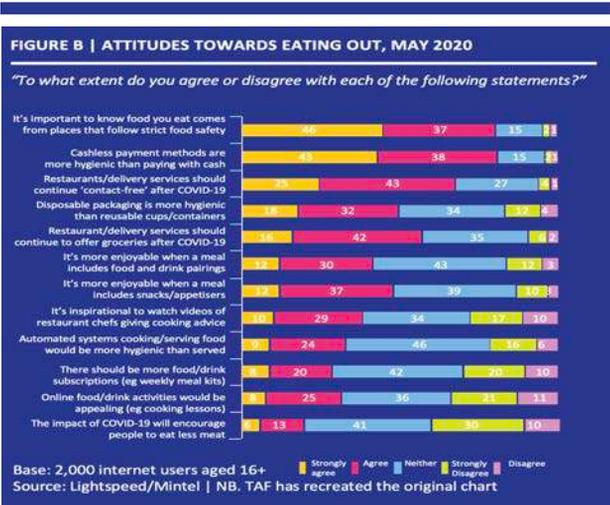


94% of Brits cooked/prepared meals at home once a week or more before the pandemic, signalling just how much cooking at home is part and parcel of British life.

Moving into the ready meals and ready-to-cook food market would be lucrative for foodservice brands, with the UK market worth £3 billion in 2019.

78% of UK adults eat ready meals/ready-to-cook foods, especially parents of under 18s.*

1. Whilst some restaurant brands such as Itsu are available in supermarkets, there is limited availability of frozen foods. Also Leon has turned its restaurants into mini supermarkets to sell restaurant quality ready meals.
2. Simply put, selling restaurant-branded food products in workplaces would be acceptable to today's customer and employee.
 - **TAF Talks:** distributing restaurant quality food in workplaces or delivered to employees at home will be key, moving into the winter months.



08 EATING OUT RESURGENCE



35% of Britons say having “a treat” has influenced their choice of food/drink since the start of the pandemic, many are still likely to want to indulge on satisfying restaurant-quality food despite the pandemic.*

1. 41% Britons are comfortable dining outdoors.
 2. 41% of Britons had not ordered takeaway/homedelivery food since before the pandemic.
 3. 40% Britons hadn’t ordered a takeaway since lockdown.*_A
 4. 28% Britons are comfortable dining indoors so more must be done to make indoor dining spaces safer as winter outdoor seating is challenging.*_B
 5. Confidence in eating out of home is slowly on the up, linked to the Eat Out to Help Out scheme.
 6. More high street foodservice operators have pivoted to outdoor/patio dining and/or moved into the takeaway sector.
 7. It’s key for foodservice operators to continue to offer take-aways/home delivery options as an alternative to dine-in services to reach consumers staying at home.
- **TAF Talks:** Rather than focus on resuming dine-in workplace services, facilities should consider takeaway/home delivery for employees working from home, even if menu options are pared down, to feed those who matter to the business.

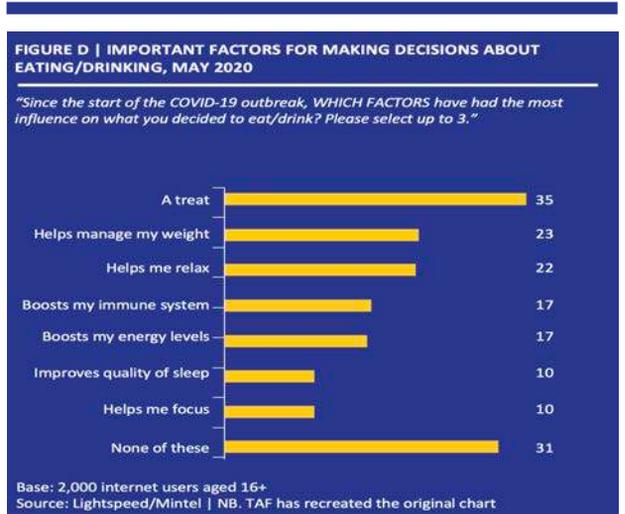
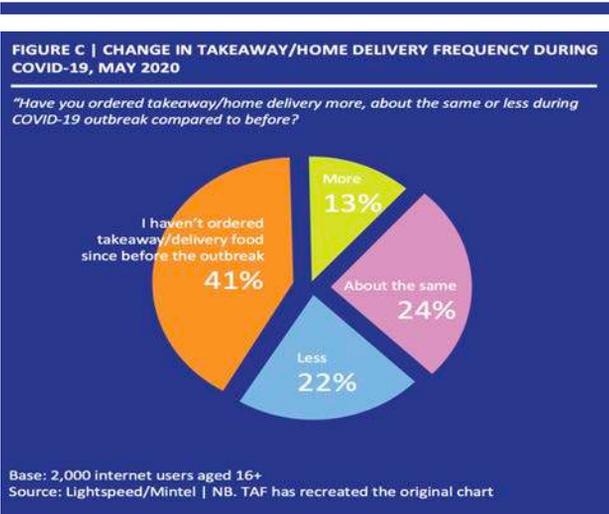
* MINTEL Survey, Future of Eating Out, August 2020

09 TREATING OUT



56% of consumers who have ordered takeaway/home delivery from Monday-Thursday since the start of the COVID-19 outbreak are eating or drinking as a treat. 35% of Britons say having “a treat” has influenced their choice of food/drink since the start of the pandemic. 39% of under 35s living with parents/family members see eating out as the time for a treat.*

1. With consumers prioritising eating out for leisure/special occasions, many are cutting back on quick, everyday meals out of home.
 2. It is now perfectly normal for consumers to treat themselves to a takeaway on a weekday.
 3. With this said, growth has been driven by the takeaway sector, with more operators investing in innovative solutions to meet demand, making best use of the materials and resources available; thus the rise of the “dark kitchen”. For example, Deliveroo has changed the landscape with portable kitchens capable of serving multiple restaurant operators solely to meet online orders.
- **TAF Talks:** Operators ought to focus on localising their capabilities and expand to areas where there are not many restaurants to choose whilst also focusing on special occasions/indulgent treat food (a welcome change to the local offerings).



*_A - As of May 2020 | *_B - As of 30 July-7 August 2020

10 TOWNIE TAKE-AWAYS



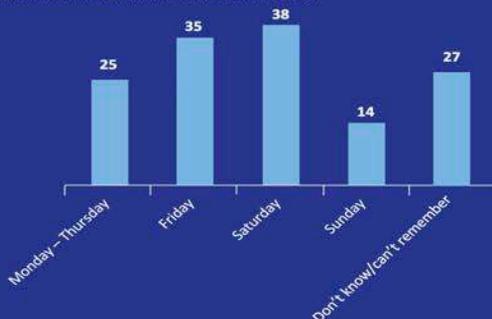
Of those ordering takeaway/home delivery on weekends since the start of COVID-19: 65% of takeaway consumers live in large towns and 57% live in cities.*

1. Unsurprisingly, Fridays and Saturdays are most popular for ordering takeaway/home delivery.
2. Usage among those living in large towns has surpassed usage among those living in cities.
3. People in suburban areas today have more disposable income (saving commuting costs), that some consumers now prefer to support local takeaway restaurants.
4. If more consumers move out of cities, or those living in large towns spend less time commuting into city offices, city based operators have a chance to break out into surrounding areas to respond to consumers' changing locations.
5. If more customers are starting to move out of cities, as research suggests, so too should city-based operators consider breaking out too.
 - **TAF Talks:** Given (a) those living in larger towns are taking away more than those living in cities and (b) the app-savvy younger generation are increasingly appearing outside cities as a result of greater home-based opportunities, there is again more scope for operators to focus on localising operations to focus on delivering the same distinct restaurant quality food to the employee at home, as they'd receive at work.

* MINTEL Survey, Future of Eating Out, August 2020

FIGURE E | DAYS OF THE WEEK USAGE FOR TAKEAWAY/HOME DELIVERY SINCE THE START OF THE PANDEMIC, MAY 2020

"Since the start of the COVID-19 outbreak, WHEN have you ordered takeaway/home delivery? Please select all that apply."



Base: 1,174 internet users aged 16+ who have ordered a takeaway/home delivery since the start of COVID-19
Source: Lightspeed/Mintel | NB. TAF has recreated the original chart

11 COUPLES CATERING

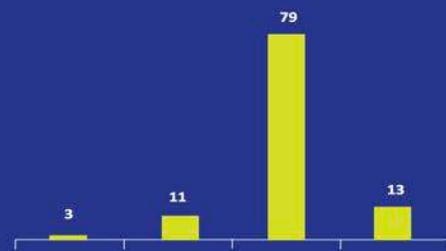


85% couples without kids are more likely to order takeaways/home deliveries for dinner. 89% of couples without children with incomes of more than £25,000 have ordered a takeaway/home delivery for dinner since the pandemic.*

1. The lack of dependents means childless couples have more disposable income making this group highly desirable for foodservice brands.
2. The dual-income potential allows childless couples to make more spontaneous decisions for personal satisfaction than other consumer groups spending more on a bigger family with a tighter budget.
3. Childless couples can pay more for a better experience and are more likely to order takeaway/home delivery from restaurant "branded" venues, so some restaurants ramped up their marketing efforts with deals geared towards couples: *For example, Pizza Hut offer couple-friendly deals i.e. "2 Medium Pizzas & 1 Side for £20" & "Any 2 Stuffed Crust, 2 Classic Sides & a 1.5 litre drink".*
 - **TAF Talks:** Creating take-home solutions on key weekdays when employees are more likely to go "in" to the corporate office would benefit your: employee and their partner, bond with them, maximise your on-site catering team revenue stream (i.e. catering for two full meals a day, per employee, rather than just one i.e. a lunch).

FIGURE F | MOST POPULAR MEALTIMES FOR TAKEAWAY/HOME DELIVERY SINCE THE START OF THE PANDEMIC, MAY 2020

"Since the start of the COVID-19 outbreak, WHAT MEALTIMES have you ordered a takeaway/home delivery for? Please select all that apply."



Base: 1,174 internet users aged 16+ who have ordered a takeaway/home delivery since the start of COVID-19
Source: Lightspeed/Mintel | NB. TAF has recreated the original chart

12 FAST FOOD GEN-Zers



Despite popular opinion, Gen-Zers have been boosting the UK fast food market with 16-24 year olds most likely to have ordered takeaway/home delivery: 50% from a fish and chip/kebab shop and 42% from a fast food burger/fried chicken bar.*

1. Fish and chip / kebab shops accounted for the largest % of visits during the start of lockdown.
 2. Usage of these outlets would have been spurred on by many large chains choosing to shut their doors during the early part of lockdown (for example, McDonald’s, KFC and Nando’s).
 3. Compared to older generations, 16-24 year olds want more enjoyment from dining, and it’s more enjoyable when a meal includes snacks/appetisers as well as food and drink pairings.
- **TAF Talks:** In industries driven by usually fast paced deadlines and task-oriented business, twined with a younger Gen-Zers desire for more enjoyment from dining, get your catering team to send out brain boosting lunch boxes (food, drink, snacks and appetisers) in return for ‘real-time’ lunch brainstorming contributions. According to Forbes*, when brainstorming, one of the 10 most important considerations is to “Get Out Of The Office”. What better way to engage your company’s creative gurus, to drive forward.

*₁ MINTEL Survey, *Future of Eating Out*, August 2020

13 PIZZA WEATHERS STORM

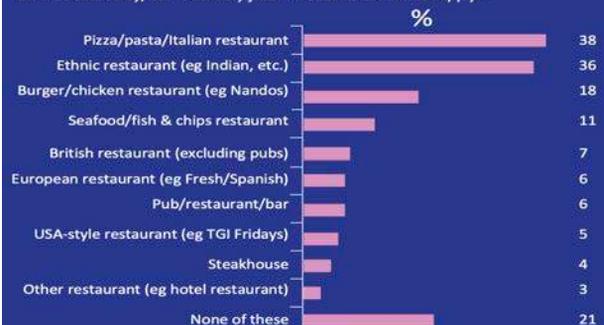


Despite ethnic restaurants falling behind pizza/pasta/Italian restaurants, some consumers have increased frequency of ordering from them since the pandemic. 47% of those ordering more takeaway/home delivery since the start of the pandemic have also ordered takeaway/home delivery from ethnic restaurants. The continued popularity of ethnic food (Chinese/Indian) shows COVID-19 has not dampened ethnic appetite across ages.*

1. With dine-in restaurants building takeaway/home delivery models, specialist pizza delivery brands (i.e. Domino’s) focused on delivery with minimal social contact, to begin with, saw a spike at the start of lockdown.
2. Going into lockdown, the rise of more adventurous cuisines through third-party delivery apps (i.e. *Just Eat*) threatened pizza delivery.
3. Ethnic restaurants turned to dark kitchen operators to meet delivery demands – i.e. *In July 2020, Dishoom partnered with Deliveroo Editions to launch dark kitchens in most parts of London.*
 - **TAF Talks:** Operators should continue to provide restaurant quality food, consumers are unlikely to get locally on account of limited local choices.

FIGURE G | RESTAURANTS VISITED FOR TAKEAWAY/DELIVERY OCCASIONS SINCE THE PANDEMIC, MAY 2020

“Since the start of the COVID-19 outbreak, WHICH TYPES OF RESTAURANT have you ordered takeaway/home delivery from? Please select all that apply.”



Base: 1,174 internet users aged 16+ who have ordered a takeaway/home delivery since the start of COVID-19
Source: Lightspeed/Mintel | NB. TAF has recreated the original chart

PART 2 |

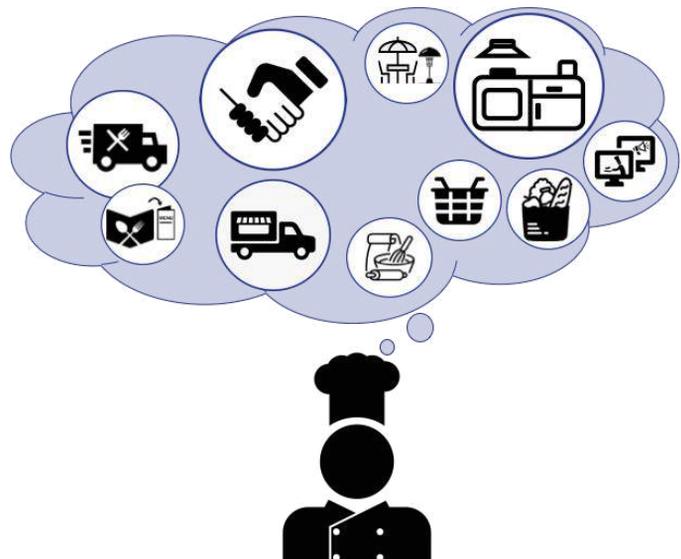
10 FOODSERVICE DISRUPTORS

How today's contract catering sector has been disrupted...

10

This section is where we assess **FOODSERVICE** within contract catering today, looking at who is disrupting, how and why, in a whole new world post COVID-19.

1. Al Fresco Dining
2. Dark Kitchens/CPUs
3. Experiential Marketing
4. Grocerants
5. Micro Markets
6. Meal Kits/Ready-To-Cook
7. Pop Up Catering
8. Simplified Menus
9. Desk Delivered
10. Foodservice Collaborations



01 AL FRESCO DINING

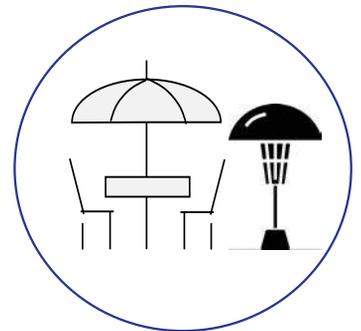
DEFINITION:

- **Al Fresco Dining** (and terrace outside dining) has been a tradition in European countries for hundreds of years and in the mid 20th century America adapted al fresco dining into rooftop restaurants and pavements in cosmopolitan cities such as New York.
- Foodservice operators have been taking advantage of warm weather to ramp up al fresco dining as restaurant dining rooms remain less attractive to some consumers.
- With the UK heading into the cooler winter months, operators must enhance outdoor facilities to keep diners warm. For example, decking rooftops with heaters.

BENEFITS

3 | Customer Convenience - at work | **Efficiency** - Takes advantage of buildings with outside terraces, more appealing than dining inside (heaters will keep diners comfortable in colder weather) | **Risk-free** - Customers may feel safe eating outside

FOODSERVICE DISRUPTORS AND THEIR BENEFITS FOR CONSUMERS	
CUSTOMER INSIGHT	AL FRESCO DINING
1. Mind Body Wellness	✓
2. Quality vs Price	✓
3. Safety Top of Mind	✓
4. Cashless Payments	✓
5. Tech Today	✓
6. Experiences & Experiential	✓
7. Rise of the Ready Meal	✓
8. Eating Out Resurgence	X
9. Treating Out	X
10. Townie Takeaways	✓
11. Couples Catering	✓
12. Fast Food Gen-Z	✓
13. Pizza Weathers Storm	X



Case Study | SEARCYS

ALL DAY DINING



Searcys successfully runs a number of B&I sites in central London and has adapted operations for some of its hospitality venues opened to the public, designing bespoke events and ‘reasons to visit’ that fully adhere to government guidelines.

BLenheim PALACE (pictured) | Running from Summer 2020 through Autumn, dinner service is being served in specially created marquee pods, providing a safe space for visitors to enjoy high quality 3 course meals.

SAATCHI GALLERY BAR AND BRASSERIE | The site offers al fresco all day dining options on the Gallery outside terrace from 11.30 to 19.30 daily, with a menu celebrating seasonal and sustainable produce, designed exclusively for the venue by executive chef Philip Neil.

AL FRESCO DINING CONSIDERATIONS:

Outdoor spaces represent a fantastic opportunity to offer employees an additional dining option to socialise and network safely. Such solutions are very client dependent (in terms of the outside space that can be converted) and reliant on the weather as we move into the winter months. An up-front investment may be required to set up heaters and winter furniture for all year-round usage.

3 benefits of outdoor dining:

- 1. Increased Restaurant Space:** additional outdoor seating increases restaurant space - especially considering the existing physical distancing rules - and potentially increases the number of meals served;
- 2. Additional Revenue:** outdoor space attracts additional customers, as people are often more comfortable eating outside;
- 3. Boosts Staff Morale:** spending time outdoors is vital to employees’ mental, emotional, and business health.

Source: Searcys Newsletter, September 2020



Additional consideration: Searcys have produced a COVID Secure Framework document for customers to access online which addresses “Touch-Free” food offerings and measures in place to safeguard customers, ensuring they “have a safe and enjoyable experience” which TAF believe is a fantastic communications initiative to reassure those considering their foodservices.

01

02 DARK KITCHENS/CPUS

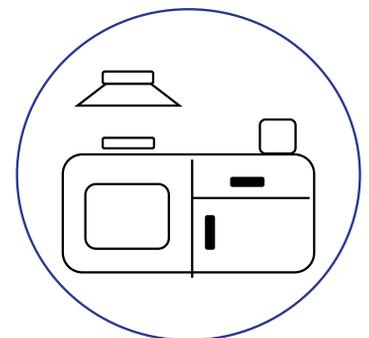
DEFINITION:

- **Dark kitchens** also known as Central Production Units (or CPUs) are virtual, cloud, ghost or delivery kitchens.
- They are catering outlets cooking purely for delivery, rather than for eat-in diners. The food is produced only be consumed elsewhere.
- This is a new business model born from restaurant brands finding innovative ways to expand food delivery reach without overstressing kitchen/labour capacity.
- *For example, Dishoom partnered with Deliveroo Editions to launch dark kitchens in most parts of London.*

BENEFITS

13 | Cost savings - Expands food delivery without overstressing capacity whilst reducing labour costs, which can be shared among clients | **Customer Convenience** - Rather than eat-in diners, they cook for deliveries and diner consumption elsewhere (employees at work/at home) | **Usability** - via simple step tech | **Productivity** - reduced queue time preparing doors on site | **Efficiency** - Maximises ROI, feeds more employees (no dependent on numbers on site) | **Sustainable** - No food waste | **Transformative** - Foodservices that help a feed employees anytime anywhere | **Mobility** - Can be designed to deliver anywhere | **Risk-free** - Contactless solutions | **Health & Wellness** - Customers have healthy options | **Performance** - Service can ramp up and down as needed | **Customer Service** - Anytime anywhere | **Quality** - Suits all tastes

FOODSERVICE DISRUPTORS & THEIR BENEFITS FOR CONSUMERS	
CUSTOMER INSIGHT	DARK KITCHENS/CPUS
1. Mind Body Wellness	✓
2. Quality vs Price	✓
3. Safety Top of Mind	✓
4. Cashless Payments	✓
5. Tech Today	✓
6. Experiences & Experiential	✓
7. Rise of the Ready Meal	✓
8. Eating Out Resurgence	X
9. Treating Out	X
10. Townie Takeaways	✓
11. Couples Catering	✓
12. Fast Food Gen-Z	✓
13. Pizza Weathers Storm	✓



Case Study 1 | FOODITUDE

PRODUCTION KITCHEN



BACKGROUND | Fooditude was founded in 2005 as an alternative model to cater for London’s corporate offices, bringing a fresh perspective to the world of catering.

THE MODEL | Food is cooked from scratch daily in their Southwark production kitchen. It is then delivered to corporate offices by their own environment friendly fleet of vans. A reduced team on site serves meals and takes care of the whole foodservice operation.

FUEL BY FOODITUDE | In July 2020, the contract caterer launched their delivered-in service consisting of workplace lunches, packaged securely, delivered safely. The service was designed for existing clients and to offer London based organisations without restaurant facilities (permanently or temporarily) a flexible food offer.

Pre-packaged (in compostable disposables), nutritionally balanced menus are cooked daily in their CPU, delivered safely and distributed by a core on site team.

INDICATIVE PRICES | Lunch = £8.50 | Breakfast + lunch = £13.00 | Lunch + treat (or snack pot) = £10.50 | Breakfast + lunch + treat (or snack pot) = £15.00

Menus change monthly; orders are collected via email. Food options are customisable on request. A £250 minimum order is required, subscriptions and volume discounts are available.

5 things Fuel by Fooditude can bring to office buildings:

1. Food is produced in a 20,000 sq ft kitchen, an abundance of space for staff to work whilst maintaining social distancing;
2. Meals cooked from scratch for healthy and happy staff;
3. Flexible ordering, adapted to individual business needs;
4. Top-notch food safety, independently audited by SALSA;
5. Good for the planet, accredited by The Planet Mark and the Sustainable Restaurant Association.

Source: Fooditude Website, September 2020



October Lunch Menu - Example			fooditude
Monday	Tuesday	Wednesday	
<p>Lunch base: Masala spiced chicken, saffron rice, pickled red cabbage, mint yogurt, crispy sev</p> <p>Vegetarian lunch base: Charred celeriac, baby kale, butterbean hummus, salsa verde, toasted hazelnuts (vegan)</p> <p>Sandwich: Roasted salmon, avocado, horseradish crema, cress, brown bloomer</p> <p>Vegetarian sandwich: Grilled courgette, crumbed goats' cheese, honey, basil, focaccia</p> <p>Treats: Lemon polenta cake, blueberry compote, candied almonds</p> <p>Snack pots: Achoise roasted tofu, burnt corn & jalapeno salsa (vegan) Spiced three cheese straws, sea salt</p>	<p>Lunch base: Grilled steak, roast mixed squash, kamut, baby kale, salsa verde, crispy capers</p> <p>Vegetarian lunch base: Bulgogi style aubergine, crispy onions, sticky rice, soft-boiled egg, kimchi</p> <p>Sandwich: Chicken Caesar – grilled chicken, soft-boiled free-range egg, shaved parmesan, Caesar mayo, little gem, sourdough</p> <p>Vegetarian sandwich: Raw rainbow vegetable wrap, crushed avocado, baby spinach (vegan)</p> <p>Treats: Date and pecan sponge, miso caramel sauce</p> <p>Snack pots: Green salad of peas and pods, mint, chili and ricotta Quinoa falafel, beetroot hummus (vegan)</p>	<p>Lunch base: Grilled tuna, slow roast pomodoro, caper and herb dressed baby potatoes, soft-boiled egg</p> <p>Vegetarian lunch base: Miso sweet potato, shitake mushroom and edamame brown rice, ponzu mayonnaise, crispy shitake and spring onion (vegan)</p> <p>Sandwich: Roast sirloin, caramelised onion mayo, mature cheddar, tomato chutney and rocket, white bloomer</p> <p>Vegetarian sandwich: Applewood smoked Cheddar, caramelised onion, slow roasted tomatoes, rocket, focaccia</p> <p>Treats: Bitter chocolate, smoked salt and caramel brownie</p> <p>Snack pots: Smoky onion hummus, toasted pine nuts, pepper (vegan) Cherry tomatoes, marinated olives bocconcini and basil</p>	



Source: Fooditude Website, September 2020

02

Case Study 2 | BARTLETT MITCHELL

BM DELIVERED



BACKGROUND | In August 2020, Bartlett Mitchell launched **BM delivered**, a new service to support clients looking for temporary food solutions during the post-Covid lockdown period. BM delivered is offered to all clients facing reduced building footfall over the next few months, or companies looking for individually packaged meals for safe distancing measures.

CENTRAL PRODUCTION KITCHEN | Bartlett Mitchell have integrated new technology to be able to deliver office meals and hospitality during the transition. Meals are produced in their existing central production kitchen, previously used for events.

PEARPAY APP | As part of the move, the company has developed its PearPay app to fully embed it into its operations. This means people can place orders directly on the app for delivery to their desks. Allergen information are collected at the time of registration, so the production kitchen can prepare allergen-safe meals.

OFFICE MEAL OPTIONS | BM Delivered includes a wide range of meal options: from simple breakfasts or grab and go items for a restaurant or coffee bar, to Bento Box meals for teams. A full hospitality offer for meetings and events is also available.

Menus are designed by chef director Pete Redman, freshly prepared daily and delivered in sustainable packaging.

COOK AT HOME | A “Cook at Home” range of take-home meal kits is also available, as well as a “Home Store” option for general groceries. This offers clients a safe, award-winning food solution, removing the need to visit the high street for everyday essentials.

FOOD THAT TRAVELS WELL | The menu range stays true to Bartlett Mitchell’s core foodie values and is freshly made, seasonal, full of flavour and beautifully presented. The menu was developed to include food that travels well, given the new mode of delivery. The aim is to get the best of a Bartlett Mitchell Restaurant and deliver it in carefully packaged format.

Source: Bartlett Mitchell Website, August 2020

Case Study 3 | BALANCED FOOD CO.

RETAIL OUTLET



In September 2020, the contract caterer opened its first high street outlet in Leadenhall Market: a fresh, new and healthy deli concept in the heart of the London insurance market. All food sold on the premises is locally sourced and produced in their central production kitchen (CPU) in Oxfordshire.

CPU | The kitchen, called Food Fist Production Kitchen is also used to prepare a variety of dishes for the company contract catering sites including main meals, sandwiches, snacks, salads and cakes. Using top quality ingredients, the goal is to support onsite teams by doing all the prep for them to allow them to focus on great presentation and service.

SUSTAINABILITY | To capitalise on its sustainability credentials, the caterer has created its own circular economy, where leftover ingredients are collected at the end of the day and reutilised creatively. In the words of company founder Ian Summers:

“We are heavily focused on bringing high-quality nutritious products to Leadenhall Market that consumers can incorporate into their day-to-day lives. We will continue bringing such products to Landmark’s marketplace through our own innovated menus”.

02

03 EXPERIENTIAL MARKETING

DEFINITION:

- **Experiential marketing** refers to campaigns using activation (i.e. product sampling, immersive experiences, stunts, events, etc.) to bring brands to life and interact directly with the target audience.
- Some operators turned to online events as face-to-face experiences diminished to deliver real-time cook-alongs seeking to strengthen customer and chef engagement, as another way of paving the way to a new business model to reach a wider audience.
- *For example, Michelin-star chef Michael O’Hare streamed live cooking demos on Instagram to accompany his delivery range of UK delivery meal kits/recipe boxes.*

BENEFITS

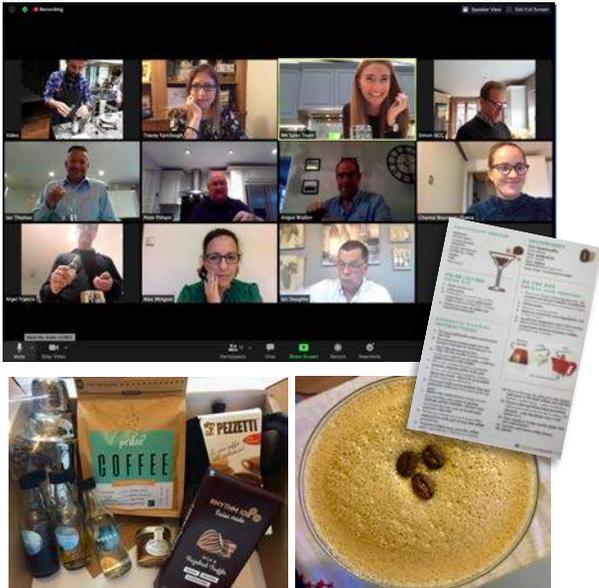
3 | Cost savings - Ability to generate additional revenue streams | **Usability** - via simple step tech | **Values** - Each meal gives back to the community so customers feel engaged

FOODSERVICE DISRUPTORS & THEIR BENEFITS FOR CONSUMERS	
CUSTOMER INSIGHT	EXPERIENTIAL MARKETING
1. Mind Body Wellness	✓
2. Quality vs Price	✓
3. Safety Top of Mind	✓
4. Cashless Payments	✓
5. Tech Today	✓
6. Experiences & Experiential	✓
7. Rise of the Ready Meal	✓
8. Eating Out Resurgence	X
9. Treating Out	✓
10. Townie Takeaways	✓
11. Couples Catering	✓
12. Fast Food Gen-Z	X
13. Pizza Weathers Storm	✓



Case Study 1 | BARTLETT MITCHELL

VIRTUAL COCKTAIL MAKING



On September 30th, to celebrate International Coffee Day, TAF were invited to an online cocktail making masterclass, an opportunity to network with other industry experts whilst making and enjoying a delicious espresso martini.

THE EVENT | Step 1: a box was sent out to attendees prior to the event, containing: Bartlett Mitchell's own brand coffee and a coffee maker, pre-measured alcoholic ingredients and syrup, a cocktail shaker and a martini glass, honey and a chocolate bar, coffee beans for decoration.

Step 2: the box also contained a recipe card, detailing the cocktail recipe and instructions on how to set-up in preparation for the event.

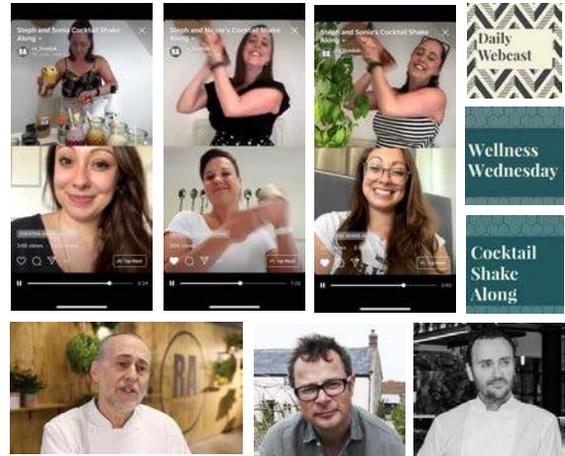
Step 3: the live event. Bartlett Mitchell's Coffee Brands Manager Miguel Teixeira Camara talked about the sustainability credentials of Perkee Coffee and hosted a live demonstration on how to make espresso martini, which attendees made live whilst on Zoom.

NETWORKING | The event enabled attendees to network in an informal environment while finessing their knowledge of cocktail making and coffee and finding out more about the suppliers Bartlett Mitchell works in partnership with.

CORPORATE OFFER | Similar events were organised by Bartlett Mitchell for their corporate clients over the last few months, a creative way to collaborate, engage with them and share knowledge.

Case Study 2 | RESTAURANT ASSOCIATES

WEEKLY WEBCASTS



In April 2020, Restaurant Associates commenced a series of weekly webcasts offering wellbeing advice and culinary education to help guests, colleagues and clients to survive and thrive during lockdown. The initiatives then evolved into a series of bite size training courses, from cooking masterclasses to sommelier workshops.

EVENTS SCHEDULE | The weekly events included:

- **Wellness Wednesdays:** a series of webcasts exploring tips and good practice to assess people's wellbeing and develop pathways to better mental health practices;
- **Coffee Talk Thursdays:** discussing coffee quality, sustainability and trends with HEJ Coffee founder Mathew Keech;
- **Cocktail shake-alongs:** a Friday afternoon Instagram Live broadcast where expert mixologists demonstrated cocktail recipes for people to replicate at home.

CORPORATE OFFER | As part of their client package, while building occupancy levels are low or teams are still working remotely, RA designed two types of online events to help boost "virtual team culture" and morale:

- **Fine Dining Experiences:** live cooking sessions with recipes developed for Restaurant Associates by Michel Roux Jr, Hugh Fearnley-Whittingstall and Jason Atherton, explained and demonstrated by the chefs themselves;
- **Post Meeting Offer:** virtual tastings and masterclasses with social enterprises HEJ Coffee, Toast Ale and Sophie's Macaroons.

In both instances, hampers and parcels are delivered to employees' homes before the event.

Source: Restaurant Associates Website, Sep 2020

03

++ WEBINARS

WEBINARS

'Connect & Collaborate' webinar series reached out to bring facilities client's wider teams into the discussion.



Source: Bartlett Mitchell Website, July 2020

WEBINARS

Community cook-alongs on Tuesday and Friday by event company Four Gables. Recipes and ingredients list available in advance on company website.



Source: Four Gables Group Facebook Page, June 2020

04 GROCERANTS

04

DEFINITION:

- **Grocerants** are a hybrid between grocer and restaurant offering raw ingredients (i.e. fruit and vegetables, freshly prepared, ready-to-eat foods) in a store setting.
- What started as a solution to convert excess kitchen supplies into groceries for customers has turned into a completely new business model.
- Some UK foodservice operators have pivoted to sell groceries in restaurant sites, effectively becoming grocerants.
- *For example, London’s Kitchen Table is selling a mix of raw ingredients (fish, meats, cheeses) and its house-made products (e.g. table bacon jam).*

BENEFITS

7 | Cost savings - Ability to generate additional revenue streams from converting excess kitchen supplies into groceries | **Customer Convenience** - At work and at home | **Sustainable** - No food waste | **Peak experience** - Convenience of sourcing restaurant quality products direct from the contract caterer | **Transformative** - Foodservices that help feed employees anytime anywhere | **Mobility** - Can be designed to deliver anywhere | **Values** - Increased focus on British produce with customers supporting local businesses

FOODSERVICE DISRUPTORS & THEIR BENEFITS FOR CONSUMERS	
CUSTOMER INSIGHT	GROCERANTS
1. Mind Body Wellness	✓
2. Quality vs Price	✓
3. Safety Top of Mind	✓
4. Cashless Payments	✓
5. Tech Today	✓
6. Experiences & Experiential	X
7. Rise of the Ready Meal	✓
8. Eating Out Resurgence	X
9. Treating Out	X
10. Townie Takeaways	✓
11. Couples Catering	✓
12. Fast Food Gen-Z	✓
13. Pizza Weathers Storm	X



Case Study 1 | BREAD & HONEY

NATURE'S CHOICE



In April 2020, despite having to close its doors temporarily, event caterer Bread & Honey continued to curate gastronomy for their customers and wider audience by creating the “Sexy Soup Kitchen”: appealing, gastronomic and homegrown.

SUPPLIER PARTNERSHIP | The luxury catering company partnered with London fruit and veg supplier Nature’s Choice to deliver fresh fruit and vegetables to people’s doors and create home-delivered recipe boxes containing the freshest produce.

RECIPES | Using Nature’s Choice products, Bread & Honey added its expertise to show people how to make delicious soups, from Cauliflower Cheese with Polonaise Crumbs and Porcini & Potato Soup with Garlic Sippets to Summer Tomato Soup or Curried Apple & Pear Soup – not average soup recipes.

The recipes also didn’t require more than a few larder essentials and the awesome produce provided in the boxes.

SOCIAL MEDIA | Two recipes per week were released on Instagram. Recipes were designed by Mark Broadbent – fool proof and yet decidedly culinary.

Bread & Honey have been championing their wonderful suppliers and their home-delivered services throughout the last six months, letting the public know what they were up to. Suppliers featured included: The Ginger Pig (meat), Clarence Court (eggs), H Forman & Son (speciality fish).



Source: Bread&Honey Website, April 2020

05 MICRO MARKETS



DEFINITION:

- **Micro Markets** are where foodservices are staff-less and offer self-serve access to fresh, healthy food and drink 24/7 via open racks, reach-in refrigeration, self-checkout kiosks, consumers paying via cashless/contactless.
- A single Micro Market can easily stock between 500-1000 products, compared to a traditional vending machine, which can hold around 40-50 product lines.
- As a result of COVID, this is what we see as at the cutting edge of enterprising catering solutions on account of the need for quality, pre-packaged and safely administered foodservices, offering the potential of 24/7 access.

BENEFITS

11 | Cost savings - Minimal labour costs | **Customer Convenience (at work)** - Shop convenient food and drink 24/7 without leaving the building | **Usability** - via simple step tech | **Efficiency** - Capability to stock between 500-1000 products (staff-less) | **Peak experience** - Meal and snack solutions instantly | **Transformative** - Foodservices that help feed employees anytime anywhere | **Style** - Discreet branding to complement any corporate environment | **Risk-free** - Contactless solutions | **Health & Wellness** - Healthy options 24/7 | **Performance** - Tech doesn't stop for staff illness | **Availability** - 24/7 access so employees can be fed around the clock

FOODSERVICE DISRUPTORS & THEIR BENEFITS FOR CONSUMERS	
CUSTOMER INSIGHT	MICRO MARKETS
1. Mind Body Wellness	✓
2. Quality vs Price	✓
3. Safety Top of Mind	✓
4. Cashless Payments	✓
5. Tech Today	✓
6. Experiences & Experiential	✓
7. Rise of the Ready Meal	✓
8. Eating Out Resurgence	X
9. Treating Out	X
10. Townie Takeaways	✓
11. Couples Catering	X
12. Fast Food Gen-Z	✓
13. Pizza Weathers Storm	X



Case Study 1 | SELECTA

MICRO MARKETS



Express Vending have been developing this foodservice model since 2013 under the brand Express HUB. The company is part of Selecta, vending machine and specialist coffee services provider.

Express Vending's micro-markets offer a cost-effective and safe solution for workplace refreshments. No queues, no front-line staff, cashless payments, and open 24/7 operations.

BENEFITS OF A MICRO MARKET ON SITE | A hygienic and contactless alternative to traditional catering; a broad product range, catering to all tastes; 24/7 access to quality food and drink; staff remain on the premises during breaks and mealtimes; machines are serviced daily by Express Vending trained staff members.

COVID-19 COMPLIANT | Express Vending's Express HUB are fully compliant with Government Covid-19 Guidelines: hand sanitising stations are installed at both entry and exit points; a one-way flow of traffic and two-metre stickers ensure physical distancing.

TECHNOLOGY | As well as contactless payment options via kiosks, Express HUB features the 365 Beacon App, allowing staff to scan items and pay through their 365 account on their own smart device, eliminating unnecessary touch points. Coffee machines can be enhanced by installing *Distance Selection Technology* to reduce touch points. This new technology allows to select hot drinks by hovering a finger over the selection screen, with a distance of up to 2 centimetres.

PRODUCT RANGE | In addition to popular grab and go items (sandwiches, salads, confectionery, fresh fruit), Express HUB provides an extensive range of healthier options including low-calorie heat-up meals and healthy snacks.

SET UP | Installation typically happens 4-5 weeks after a signed agreement is received and bespoke product bays are prepared. Whenever possible, installation takes place over weekends. In most instances, engineers install new Express HUBs between close of business on Friday, and Monday morning.

Source: Express Vending Website, October 2020



05

06 MEAL KITS/READY-TO-COOK

DEFINITION:

- **Meal Kits and Ready-to-Cook Recipes** were adopted by some restaurant operators to generate revenue from the unravelling lockdown home cooking boom.
- Meal kits, self-assemble DIY kits and reheat to eat options (prepacked meal kits with recipe cards), require customers to cook from scratch or put together at home.
- Personalisation bridges the gap between diner and chef enabling the customer to appreciate the chef’s craft, whilst having fun in preparing a dish they like.
- *For example, Pizza Pilgrims launched a “Pizza in the Post” meal kit including proofed dough and toppings, with video instructions.*

BENEFITS

9 | Cost savings - generates additional revenue from home cooking option | **Customer Convenience** - at home | **Sustainable** - No food waste | **Peak experience** - Quality meals and snack solutions at home | **Transformative** - Foodservices that help feed employees anytime anywhere | **Mobility** - Can be designed to deliver anywhere | **Risk-free** - Contactless solutions and safe food with provenance verified, so customers feel safe eating | **Health & Wellness** - Customers have healthy options | **Availability** - 24/7 access so employees can be fed around the clock

FOODSERVICE DISRUPTORS & THEIR BENEFITS FOR CONSUMERS	
CUSTOMER INSIGHT	MEAL KITS/READY TO COOK
1. Mind Body Wellness	✓
2. Quality vs Price	✓
3. Safety Top of Mind	✓
4. Cashless Payments	✓
5. Tech Today	✓
6. Experiences & Experiential	✓
7. Rise of the Ready Meal	✓
8. Eating Out Resurgence	X
9. Treating Out	✓
10. Townie Takeaways	✓
11. Couples Catering	✓
12. Fast Food Gen-Z	✓
13. Pizza Weathers Storm	✓



Case Study 1 | OLIVE CATERING

OLIVE AT HOME



In August 2020, Olive Catering launched Olive at Home, an own brand meal kit delivery service designed to support people across the country looking for a hassle-free way to cook, while still being able to try new and exciting dishes.

PRODUCT LAUNCH | First launched across their workplace restaurants, Olive at Home has been introduced to offer an easier way to cook, providing tasty meal kits which include everything needed to create a delicious family dinner.

MEAL KITS | Each kit includes an easy-to-follow recipe, as well as the pre-measured ingredients required to create a healthy but tasty meal from scratch. All customers need to do is complete an order form at work, select portion sizes, and then simply collect their Olive at Home bag before leaving at the end of the day.

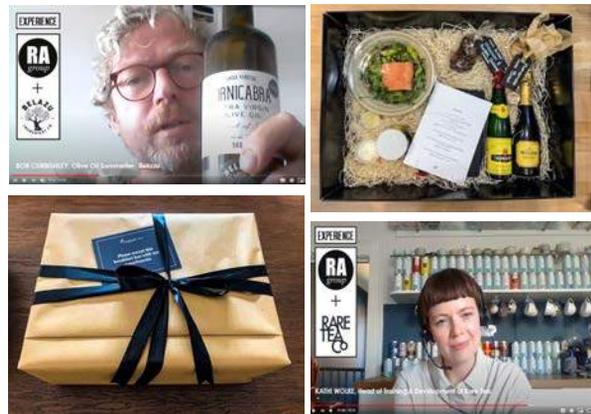
RECIPES | From Thai red chicken curry, to blue cheese and walnut orzotto, a different dish is on offer each week, meticulously developed by Olive's Food Innovation Team.

NEW WAYS OF DINING | As the nation begins to explore the 'new normal' ways of working and dining, Olive Catering has pledged to continue providing an exciting and innovative approach to catering for businesses across the country. Using only the freshest ingredients, cooked by professional chefs, its menus focus on healthy, seasonal dishes, created and served safely every day.

Source: Olive Catering Website, August 2020

Case Study 2 | RESTAURANT ASSOCIATES

VIRTUAL MEETING HAMPERS



Pictured: Hospitality hampers for virtual meetings delivered to employees' homes to be assembled prior to the event and RAG Experience interactive live sessions.

In October 2020, in a drive to reimagine the way hospitality is delivered to clients after the pandemic, Restaurant Associates has developed "RAG EXPERIENCE", in response to the shift towards the agile, 'anywhere' working model: a suite of empowering virtual events and premium, delivered to your door hospitality.

IMPROVING THE REMOTE WORKING EXPERIENCE | The initiative was designed to celebrate company culture, foster employee wellness, motivate new starters, promote team building, delight clients and partners, elevate online meetings.

EXPERIENCES | The 4 following experiences are available:

1. *Events*: interactive food and drink experiences, delivered online.
2. *Masterclasses*: step-by-step tutorials from culinary royalty, at home.
3. *Hampers*: luxury food & drink hampers, delivered.
4. *Hospitality*: hospitality packages for any occasion in the workplace or home.

EXPERIENCES WITH A PURPOSE | The underlying purpose of all Restaurant Associates' experiences, is maintaining a commitment to 10 of the UN's Sustainable Development Goals through the use certified social enterprise partners (across every element of service), eco-friendly packaging (fully recyclable or compostable), emissions-free delivery where possible (centrally managed to be low impact).

Source: Restaurant Associates Website, October 2020

06

07 POP UP CATERING

DEFINITION:

- **Pop Up Catering** (or mobile catering) is where restaurant foodservice operators have turned to pop up mobile catering to deliver food and beverages to customers.
- While foodservice venue dine-in activities ground to a halt during lockdown, some operators pivoted to mobile catering and in the eyes of the consumer these “here today, gone tomorrow” initiatives enable diners to eat something different.
- *For Example, London-based bakery The Dusty Knuckle operates a mobile format as a food truck with no seating area. This option allows the bakery brand to mobilise its business whilst maintaining safe physical distancing.*

BENEFITS

3 | Peak experience - Quality meal and snack solutions “here today, gone tomorrow” enabling diners to eat something different | **Quality** - Everyday authentic ranges provided by individual operators could cater to all budgets and palates | **Flexibility** - Allows flexi-foodservice to changing building populations

FOODSERVICE DISRUPTORS & THEIR BENEFITS FOR CONSUMERS	
CUSTOMER INSIGHT	POP UP CATERING
1. Mind Body Wellness	✓
2. Quality vs Price	✓
3. Safety Top of Mind	✓
4. Cashless Payments	✓
5. Tech Today	✓
6. Experiences & Experiential	✓
7. Rise of the Ready Meal	X
8. Eating Out Resurgence	✓
9. Treating Out	✓
10. Townie Takeaways	✓
11. Couples Catering	✓
12. Fast Food Gen-Z	✓
13. Pizza Weathers Storm	✓



Case Study 1 | LEVY UK & IRELAND

KERB



On October 7th, Levy UK & Ireland announced an exclusive partnership with street food pioneers KERB.

THE PARTNERSHIP | The industry-first deal will form part of a wider collaboration with Compass Group to develop and deliver new hospitality and retail services to bring the best new food-talent and the very latest in retail street food trends to Levy's sporting, events, and conference venues across the UK.

Jonathan Davies, MD of Levy UK, said:

“This is not only a partnership born of a shared love of the joy that great food can bring, but also a partnership built on shared values. Through our Levy Cares commitments, we believe the food industry has a responsibility to do more for the planet, the teams we work with, and the communities we work in, and these principles have been part of KERB's DNA from day one.”

NATIONWIDE EXPANSION | This new collaboration will support KERB's plans to expand into other major UK cities via Levy's nationwide network of venues. Exciting plans are in the making to bring an expertly curated mix of KERB's street food society to some of Levy's venues, bringing new menus and food experiences to fans and visitors during 2021.

Source: Levy UK Website, October 2020

Pop Up CONCEPT A

KERB



A membership organisation dedicated to the incubation and acceleration of London's most innovative street food businesses, founded in 2010.

CONCEPT | The idea was to seek out the most exciting street food talent and bring them together on the streets of London progressing a dynamic, previously unorganised industry.

QUALITY | KERB have improved the quality of food served on the capital's streets, legitimised the industry through professionalising its practices, given Londoners something tasty to eat every day and grown a community of entrepreneurs who are driving real change across the city.

THE PLATFORM | KERB's platform continues to expand because it has been built on a simple founding principle: transforming city spaces through amazing food, talented people and professional practices.

VENUES | KERB takes street food vendors into London's biggest, most iconic venues. Its experienced team works all year round in London and beyond, managing events for 50 up to thousands of guests at experiential events, conferences, parties, festivals, private dinners & product launches.

KERB gives corporate organisations access to over 100 street food traders, setting up pop-ups in office buildings.

Source: KERB Website, October 2020

07

08 SIMPLIFIED MENUS

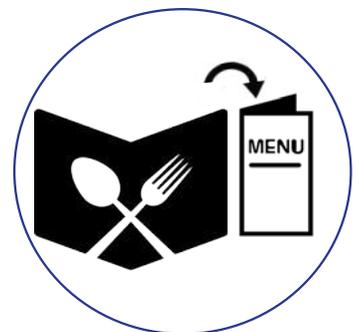
DEFINITION:

- Almost all restaurants and restaurateurs have **simplified menus** in order to refocus their kitchen and labour resources and reduce food waste and costs as a result of COVID-19.
- A set menu clearly has significant economic advantages, allowing operators to optimise ingredients, resulting in less waste and spoilage, as well as labour costs.
- *For example, in June, London’s Claude Bosi at Bibendum launched a Prix Fixe daily changing set menu available for pre-order and collection Thursday to Sunday.*

BENEFITS

3 | Cost savings - Optimises ingredients resulting in less wastage/spoilage costs and lower labour costs | **Efficiency** - Maximises ROI by refocusing kitchen and labour resources | **Sustainable** - Less waste

FOODSERVICE DISRUPTORS & THEIR BENEFITS FOR CONSUMERS	
CUSTOMER INSIGHT	SIMPLIFIED MENUS
1. Mind Body Wellness	✓
2. Quality vs Price	✓
3. Safety Top of Mind	✓
4. Cashless Payments	✓
5. Tech Today	✓
6. Experiences & Experiential	X
7. Rise of the Ready Meal	✓
8. Eating Out Resurgence	✓
9. Treating Out	X
10. Townie Takeaways	✓
11. Couples Catering	✓
12. Fast Food Gen-Z	✓
13. Pizza Weathers Storm	✓



Case Study 1 | ELIOR

SIMPLIFIED MENUS



In July 2020, this large caterer launched Good to Go – a new Covid-safe brand delivering a delicious range of food at sites quickly, conveniently and safely.

PRODUCT RANGE | The range, specially created by Elior’s development team, includes handmade sandwiches, salads, pasta pots, fruit and grab & go snacks, drinks and hot beverages. It also includes a range of hot and cold options as well as tasty treats.

PRE-ORDERING | For added security, customers can order food and drinks via the Breaz pre-order and pay app, ready for safe distanced collection at a time that suits.

PACKAGING | All packaging supports the safety and security of products and is strong, secure, clearly labelled and disposable, including fully recyclable and compostable grab pots, sandwich boxes and salad dishes. Items are well sealed and ensure minimal handling contact and reduced risk of cross contamination both in terms of production and display.

TEAM SAFETY | The offers have been curated to be achievable by a scaled down front and back of house team, reducing overcrowding in the catering areas.

FOOD CONSISTENCY | Good to Go has been created using Elior’s web-based recipe and menu management solution linked directly to the Breaz app giving greater security of customer information on allergens and nutrition to comply with distant selling regulations. The launch of Good to Go is part of a wider support package to help clients re-open safely.

Source: Elior Website, September 2020

Case Study 2 | BLUE APPLE

SIMPLIFIED MENUS



Since June 2020, this more boutique caterer, Blue Apple has been working with clients to bring their restaurants and cafes in line with government guidance measures to ensure both employees and catering teams were safe.

MENU DESIGN | The contract caterer has redesigned and optimized their menu by introducing a foodservice concept called “Core”, to ensure a safe, agile and still exciting food offer. All dishes have been refined to minimize waste and are served in a range of eco friendly disposables.

TECHNOLOGY | Blue Apple has also developed a new App and introduced a virtual pre-order and pay platform which reduces the number of touch-points catering staff have with customers. This system allows employees to view menus, pre-order, pay and book a collection time slot which will control the physical distancing in the restaurant. The onsite catering team manages the collection time slots to ensure safety and a prompt service.

CUSTOMISATION | The pre-order platform is personalised for each client, with menus, opening hours, promotions and tariffs. A set up, monthly maintenance and licensing fee for the technology applies, but the platform assists effectively in the management of queues, payment and wastage.

For sites with really low numbers Blue Apple provides a pre-order service only.

Source: Blue Apple Website, August 2020

08

Case Study 3 | SODEXO

SIMPLIFIED MENUS



In September 2020, global powerhouse caterer Sodexo appears to be globally rolling out what's on offer and how it's offered.

Consumers enjoy the convenience of takeout meals as a treat, giving them variety or a break from having to cook at home. They are also concerned about safety and the possibility of contamination of the food they purchase. Packaged meals seem to eliminate that risk and are currently the preferred option.

SUSTAINABLE PACKAGING | The caterer focus on safety hasn't affected their commitment to corporate social responsibility. In the UK, sustainability is built into their takeaway programs and therefore compostable, fully recyclable packaging is in use.

INNOVATIVE MEAL OPTIONS | Guests returning to workplace restaurants will seek familiar options at first and will be looking for additional variety over time, wanting to try new dishes and see trends incorporated in their meals.

ENHANCED BREAKFAST OFFER | As breakfast is the fastest growing daypart across the world, Sodexo has created additional takeaway options, adding on-trend dishes such as breakfast bowls, new bakery products, hot filled breads, hot and cold oats.

SIMPLY TO GO RANGE | In the UK, Sodexo's range "Simply to Go" has been expanded, offering both hot and reheatable meals: grain bowls, wraps, sandwiches and comfort food dishes, freshly prepared by onsite teams and packaged for safety.

PRE-ORDERING AND PRE-PAYMENT | As consumers require efficiency, speed, contactless interactions and payment, Sodexo has invested in developing a single technological solution through their App *Bite*, allowing guests to spend less time in restaurants by placing orders via app. Customers wishing to choose their meal directly can also have a contactless experience using the payment feature within the app.

Source: Sodexo Corporate Website, September 2020



08

09 DESK DELIVERED



DEFINITION:

- **Desk delivered** became popular during lockdown when commercial deliveries with workplaces and institutions ground to a halt, couriers pivoting to residential deliveries instead, as consumers moved to online shopping.
- Foodservice operators were quick to leverage participation in online shopping and accessibility of courier services by introducing nationwide delivery.
- This opened the door for more foodservice brands to increase brand awareness to a national level whilst operating from one central kitchen/delivery hub.

BENEFITS

14 | Cost savings - Optimises ingredients resulting in less wastage/spoilage costs and lower labour costs | **Customer Convenience** - at work | **Usability** - Simple step tech | **Productivity** - Reduced queue time preparing doors on site | **Sustainable** - No food waste as made to order | **Peak experience** - Quality meal and snack solutions | **Transformative** | foodservices that help feed employees anytime anywhere | **Style** - Discreet branding to complement any corporate environment | **Mobility** - Can be delivered to any desk on site | **Risk-free** - Contactless solutions and safe food with provenance so customers feel safe eating | **Health & Wellness** - Customers have healthy options | **Customer Service** - Anywhere on site | **Peace of Mind** - Increased safety due to employees not leaving the office for their lunch breaks | **Flexibility** - A flexible food offer adapting to building population size

FOODSERVICE DISRUPTORS & THEIR BENEFITS FOR CONSUMERS	
CUSTOMER INSIGHT	DESK DELIVERED
1. Mind Body Wellness	✓
2. Quality vs Price	✓
3. Safety Top of Mind	✓
4. Cashless Payments	✓
5. Tech Today	✓
6. Experiences & Experiential	X
7. Rise of the Ready Meal	✓
8. Eating Out Resurgence	✓
9. Treating Out	✓
10. Townie Takeaways	✓
11. Couples Catering	X
12. Fast Food Gen-Z	✓
13. Pizza Weathers Storm	✓



Case Study 1 | GENUINE DINING CO.

GENUINE DELIVERY



In July 2020, The Genuine Dining Co. has expanded operations with the introduction of “Genuine Delivery”, a same day food delivery service with online ordering.

With reduced numbers returning to the workplace, Genuine Delivery was designed to help retain staff within the office, reducing the need to visit the high street, making offices safer. It supports offices of any size with a delivered-in model that is totally scalable to changing building demands. Food is fresh, sustainable and 100% traceable back to source.

THE MODEL | Genuine Delivery supports offices with a wide range of delivered-in produce available, including hot food. Orders are to be placed online by 2pm the day before, meals being then dropped off to offices at an agreed location and time. Food is delivered 7 days a week.

BENEFITS | Doorstep delivery whilst ensuring staff safety, a wide variety of breakfast and lunch options, easy and hassle-free ordering. Food is delivered in sustainable and environmentally friendly packaging.

PRODUCT RANGE | The grab and go range includes freshly made sandwiches, boxed salads, yoghurt pots and dessert pots. The hot meals cater for all requirements: vegetarian, plant-based, dairy-free, gluten-free. The caterer is also offering picnic boxes on request, perfect to enjoy anywhere. They are beautifully packaged and ready to eat. The range includes meat, vegetarian and dessert boxes.

Menus are produced and delivered in accordance with current regulations to ensure employee safety and peace of mind.

Source: Genuine Dining Company Website, October 2020



Case Study 2 | BLUE STRAWBERRY

DINE TO DESK



In July 2020, event caterer Blue Strawberry founded Flourish, its own desk delivery service. Blue Strawberry is an accomplished, forward-thinking company which has enjoyed three decades at the forefront of London's demanding hospitality industry.

THE MODEL | Flourish supports businesses by providing high quality, nutritious menus, ordered online by individual employees and delivered directly to their desks. This new service keeps staff from having to navigate busy high street eateries, thereby mitigating risks to the workforce.

MENU OPTIONS | Flourish Dine to Desk menus offer a wide variety of options that change daily from light salads, to hearty lunches, nutritious soups and tasty sandwiches.

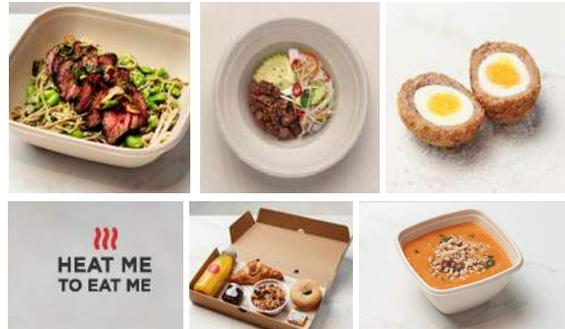
EFFECTIVE MANAGEMENT | Staff satisfaction and retention are clients' highest priorities, alongside providing a pleasant Covid-Secure environment for employees. Flourish removes the burden of in-house management, giving clients their time back, so they can focus on their own key objectives.

ADDITIONAL SERVICES | Flourish can also provide staffing for reception, administrative tasks, housekeeping, meet & greet, meetings and events.

Source: Flourish/ Blue Strawberry Websites, September 2020

Case Study 3 | GOOD EATING COMPANY

GOOD EATING DELIVERED



In September 2020, The Good Eating Company (GEC) launched Good Eating Delivered, a new workplace food delivery solution. The new service is designed for urban markets and will support businesses as they look to re-engage with employees and clients in a safe and sustainable way, as they return to their workplaces.

THE MODEL | Good Eating Delivered uses the firm's central production unit in West London and is powered by Sodexo's digital retail app *Twelve*, to provide a seamless experience for ordering and payment.

MENU OPTIONS | The menus for Good Eating Delivered have been designed by GEC chefs and built on the company's ethos of providing high quality workplace food delivered with passion and care. They include breakfast and lunch options, hot and cold grab & go and hospitality meals. Sample main dishes include: Keralan chicken curry, steamed basmati & coconut raita; black bean & vegetable chilli, green rice, pink onions & jalapenos. Salad boxes include: spicy tuna poke and miso salmon, with steamed sushi rice sliced cucumbers, carrots, radishes and edamame beans.

Initially, Good Eating Delivered will serve current GEC and Sodexo clients in central London and London business parks.

Source: Sodexo UK Website, September 2020

10 COLLABORATIVE WORKING

DEFINITION:

- More **collaborative working**, less competition refers to restaurant operators connecting with fellow operators (e.g food delivery network share) as concerted efforts help the wider eating out market recover.
- These collaborations give diners a chance to sample something different, especially if guest chefs are visiting from another region or country, they also offer chefs a valuable opportunity to network, research and extend their brand to a new customer base.

BENEFITS

12 | Customer Convenience | At work and at home in sampling something different | **Usability** | solutions operate through Apps | **Productivity** | An enhanced food offer that goes beyond more traditional catering solutions. The possibility to take advantage of existing supply chains and distribution networks to reach a wider audience | **Efficiency** - Maximises ROI, capable of feeding more employees | **Peak experience** - Quality meal and snack solutions (through food delivery network share) | **Transformative** - Foodservices that help feed employees anytime anywhere | **Mobility** - Can be designed to be deliver anywhere | **Risk-free** - Contactless solutions and safe food with provenance verified, so customers feel safe eating | **Health & Wellness** - Customers have healthy options | **Customer Service** - Anytime anywhere | **Quality** - Everyday authentic ranges catering to all budgets and palates | **Flexibility** - Service non dependent on building populations

FOODSERVICE DISRUPTORS & THEIR BENEFITS FOR CONSUMERS	
CUSTOMER INSIGHT	FOODSERVICE COLLABORATIONS
1. Mind Body Wellness	✓
2. Quality vs Price	✓
3. Safety Top of Mind	✓
4. Cashless Payments	✓
5. Tech Today	✓
6. Experiences & Experiential	✓
7. Rise of the Ready Meal	✓
8. Eating Out Resurgence	✓
9. Treating Out	✓
10. Townie Takeaways	✓
11. Couples Catering	✓
12. Fast Food Gen-Z	✓
13. Pizza Weathers Storm	✓



Case Study 1 | COMPASS GROUP UK

FEEDR



In March 2020, Compass acquired tech start-up Feedr, a mobile ordering and pre-payment system providing healthy food for customers at the click of a button.

Compass Group UK and Ireland acquired Feedr to accelerate its digital transformation. The deal played a key role in reshaping the “return to work” strategy.

“Feedr’s mobile ordering and pre-pay technology will enable Compass to transform the way people interact with on-site restaurants, so employees can browse menus, pay and collect more flexibly, enhancing their food at work experience.”

COMPASS GROUP UK AND IRELAND

SOFTWARE USE | Compass Group plans to utilise Feedr’s software across corporate clients, with further potential applications of the technology in education and healthcare.

PERSONALISED EATING | Feedr’s focus on nutrition and health means employees can use the app to track and personalise their daily eating, helping them make healthier choices and giving them a better picture of nutrition from the meals they consume at work. This offers companies a way to put wellbeing at the heart of their food at work strategy.

THE COLLABORATION | Compass is investing in growing Feedr as an independent brand which will continue to operate in the delivery market with its Cloud Canteen product (*see right*). Feedr will also leverage Compass’s global reach to accelerate growth.

Source: Compass Website, September 2020

COLLABORATOR A

FEEDR



Feedr is an online food marketplace founded in 2016, with the objective to transform how employees access healthy food and better nutrition at work. Feedr works with London’s most innovative food producers who make delicious, sustainably sourced food from scratch.

SOFTWARE | Feedr own software gives individual users the ability to set their own food goals, experience personalised menus and unique content, while benefiting from rewards and subsidies from their company.

CORPORATE OFFER | Feedr provides the following services:

- 1. Cloud Canteen** | Employees order their own meals while clients oversee everything via an admin portal, from selecting vendors to managing invoices.
- 2. Home Deliveries** | A curated selection of at-home food offering to cater for every occasion: employee onboarding, weekly team breakfasts, remote working lunches.
- 3. Group Catering** | Healthy office catering from London’s best vendors. Whether a meeting, foodie pop-up, or bespoke event, Feedr vendor community makes it happen by providing sandwich platters, luxury lunches, team breakfasts and perk boxes.

BENEFITS | Flexible subsidies, giving clients the ability to contribute to employee meals as much or as little as they like; Individual accounts for each employee, enabling them to order with a simple 2-click check out process; a central platform for clients to manage everything from vendors to invoices

MENUS | Menus change daily, rotating between over 100 food providers. Orders can be placed on the day or up to 7 days in advance for employees to meal plan. Food is delivered in eco-friendly packaging, with green delivery methods.

Clients include Etsy, Red Bull and AIRBNB.

Source: Feedr Website, September 2020

Case Study 2 | ARAMARK

GRUBBY



Aramark has also recently, in July 2020, partnered with plant-based startup Grubby to give customers delicious fresh ingredients to cook at home.

With pandemic restrictions affecting office occupancy levels across the UK, Aramark and Grubby clients will be able to avail of Grubby Kits through an easy-to-use home delivery service.

THE MODEL | The bespoke Grubby App allows users to buy their kits through a simple QR code scanner, whilst giving them free access to all their recipes and unique Spotify 'pre-playlists'. This partnership allows Aramark clients to avoid supermarket visits where large crowds gather, by providing pre-portioned, nutritionally balanced, 100% plant-based meals to prepare and eat at home.

All ingredients supplied are plant based and provided in environmentally friendly packaging.

“Truly, the age of the meal delivery service is upon us and this is one innovation further for our clients. By expanding our offering to include Grubby, we affirm our promise to constantly innovate our offering and deliver healthy, delicious recipes – now, whether onsite or at home.”
ARAMARK FOOD SERVICES UK

Source: Aramark Website, July 2020

COLLABORATOR B

GRUBBY



GRUBBY

Grubby is an innovative start-up and plant-based recipe kit business, who until recently, had begun stocking forward thinking offices with their recipe kits for employees to pick up as they leave.

COMPANY MISSION | Grubby aims at making plant-based meals more convenient and accessible to everyone without it costing the earth, whilst enhancing the sustainability of the workplace and improving the well-being of the people in it. Grubby makes it easier for customers to cook quick and tasty dinners throughout the working week.

GRUBBY FOR THE WORKPLACE | 5 Steps:

1. Client organisations stock a simply designed pick-up point occupying 2 Sq feet only, with no need for a power outlet;
2. A different fresh batch of recipe kits is supplied every day, each feeding two people;
3. Employees just tap to pay when they want a bag, by phone. Grubby's in app payment means nobody has to search for their wallet or the right change;
4. It's a fully managed service that requires no additional work from the catering team, as Grubby takes care of all the daily restocking;
5. Leftover bags are removed, and meals re-distributed to Grubby's waste food partners.

GRUBBY AT HOME | Grubby also supplies convenient plant-based meals, ready in under 30 minutes to be pre-ordered and delivered to employee's homes. Balanced nutrition, great variety and a playlist with every recipe.

BENEFITS | Healthier employees, low carbon footprint, plant-based sustainability, free service if more than 300 are on site.

Source: Grubby Website, 2020

POTENTIAL COLLABORATOR C

KARNIVAL



A modern catering company bringing high quality pop-up street food traders into offices for team lunches and corporate events.

CONCEPT | Karnival partners with over 100 street food vendors that are rotated each time clients book them. One week employees could be munching down some delicious handmade pasta and the next tucking into some tasty Korean bibimbap.

EMPLOYEE ENGAGEMENT | Karnival traders engage employees with the fun and theatre of London's booming street food scene. The purpose: making lunchtimes exciting by getting people away from their desks, enjoying London's best street food.

SERVICE | The operator caters for everything from office lunches to parties and bespoke events. No deliveries, just pop-ups. 2 types of pop-up are available:

- 1. Pre-paid pop-ups** | Karnival's team take care of everything, from arrival on site to service, allowing lunchtimes to be the enjoyable, sociable occasion they should be.
- 2. Selling pop-ups** | Pop-up canteens give employees access to the hottest street food in offices. In the absence of a predetermined budget, employees can come and buy the food.

Source: KARNIVAL Website, 2020

POTENTIAL COLLABORATOR D

CITY PANTRY



City Pantry was founded in 2013 (and acquired in 2019 by Just Eat) and currently feeds over 30,000 people at 600+ companies weekly (including Amazon, Spotify and Google) They have over 600 restaurants in their portfolio to supply food at work.

THE MODEL | The company partners with the restaurants and caterers to take delicious food to offices and remote teams, whatever the occasion: contact-free deliveries, solutions for teams at home, individually-boxed lunches, breakfasts and even bespoke corporate catering. Orders are placed online through City Pantry website.

POP-UPS | City Pantry offers a range of event catering options and ideas, with chefs available to cater directly to office spaces. Everything is taken care of, from set up to serving and clearing.

MEETINGS AND EVENTS | Whether it's internal, external or even a late-night Skype, City Pantry supplies food for any office meeting. They deliver hot and fresh food to the office that's bespoke to every type of client. Orders can be placed online on the day or as far in advance as desired.

TEAMS AT HOME | City Pantry has launched 2 new services so businesses can re-purpose their weekly food budget and continue providing office food perks to staff at home:

- 1. Gift Cards** | Teams@home gift cards are powered by Just Eat, for use against any meals ordered to employees' homes via the Just Eat website.
- 2. Pantry Packages** | Pantry Packages food boxes include fresh fruit and vegetables, dessert boxes, meal kits and more. Delivered contact-free after both budget and delivery day are confirmed. Delivery options are UK-wide.

Source: City Pantry Website, 2020

07

MARKET OVERVIEW

TAF have approached all 40 caterers in our network in a research and gather activity to ask, by means of a brief questionnaire (October 2020), what initiatives they have developed or implemented in recent months to adapt and evolve their catering provision. See below for their responses:

10 FOODSERVICE DISTRUPTORS POST COVID-19 OUTBREAK											
No.	CATERER	1 Al Fresco Dining	2 Dark Kitchens	3 Experiential Marketing	4 Grocerants	5 Micro Markets	6 Meal Kits/. Ready-to-Cook	7 Pop-Up Catering	8 Simplified Menus	9 Desk Delivered Services	10 Foodservice Collaborations
1	Accent Catering	X	X	X	X	X	X	✓	✓	X	X
2	Aramark	✓	✓	✓	X	✓	✓	✓	✓	✓	✓
3	Artizian	X	X	X	X	X	X	X	✓	✓	X
4	Balanced Food Co.	✓	✓	X	X	X	✓	✓	✓	X	X
5	Bartlett Mitchell	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
6	Baxter Storey	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
7	Bennett Hay	X	✓	✓	X	✓	X	✓	✓	✓	✓
8	Blue Apple	X	X	✓	X	X	In progress	X	✓	✓	X
9	Blue Strawberry Group	✓	✓	X	X	X	✓	✓	✓	✓	X
10	Bread & Honey	✓	✓	✓	✓	X	✓	✓	X	X	✓
11	CH&CO.	✓	✓	✓	✓	✓	✓	✓	✓	✓	X
12	Compass Group	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
13	Connect Catering	✓	X	✓	✓	X	✓	✓	✓	✓	X
14	Elior	✓	✓	✓	✓	X	✓	✓	✓	✓	✓
15	Eurest	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
16	Feastly	X	✓	X	X	X	✓	✓	✓	✓	X
17	Foodtitude	X	✓	X	X	X	✓	✓	✓	✓	✓
18	Food by Dish	✓	✓	✓	X	X	X	✓	X	X	X
19	Four Gables	✓	✓	✓	X	X	✓	✓	✓	X	✓
20	Gather & Gather	✓	✓	✓	✓	✓	✓	✓	✓	✓	X
21	Genuine Dining Co.	✓	✓	In progress	X	✓	In progress	✓	✓	✓	✓
22	Good Eating Co.	X	✓	✓	X	X	✓	✓	✓	✓	✓
23	Graysons	✓	✓	X	X	✓	X	✓	✓	X	✓
24	Green & Fortune	✓	✓	✓	X	X	X	✓	✓	X	✓
25	Houston & Hawkes	In progress	✓	✓	✓	✓	✓	✓	✓	✓	✓
26	ISS Foodservices	X	X	✓	X	✓	X	✓	✓	X	✓
27	Lexington	✓	✓	✓	✓	X	✓	✓	✓	✓	✓
28	Levy UK	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
29	Olive Catering	X	X	X	✓	✓	✓	✓	✓	✓	X
30	PS Catering Management	✓	✓	X	X	X	X	✓	✓	X	X
31	Radish	✓	X	X	✓	✓	✓	X	✓	X	✓
32	Restaurant Associates	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
33	Rhubarb	✓	✓	✓	X	X	✓	✓	✓	✓	✓
34	Searcys	✓	X	✓	X	X	X	✓	✓	X	X
35	Sodexo	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
36	Talkington Bates	✓	✓	X	X	X	✓	✓	✓	✓	X
37	Thomas Franks	✓	✓	✓	X	✓	✓	✓	✓	✓	X
38	TNS Catering	✓	X	✓	✓	X	X	✓	✓	✓	✓
39	Vacherin	✓	X	✓	✓	X	✓	✓	✓	✓	✓
40	Wilson Vale	✓	X	✓	✓	X	✓	✓	✓	✓	✓

PART 3 | FOODSERVICE FUTURE FOCUS

And on to digital transformation...



This section highlights **OPPORTUNITTIES** for facilities to cater for the post COVID-19 customer (working with your contract caterer or yourself, if you self-manage).



A APP TECH DISRUPTION

Do you have the right app technology in place?

- Foodservice operators have adapted to remain open and safeguard staff and customers by transitioning to digital technology as an alternative to traditional serve & pay methods.
- Six months on from declaring a pandemic, digital sentiment has never been more positive, with a rising belief that companies failing to make digital advancements may be those that struggle to survive in a society that's permanently altered.
- Customers have become dependent on digital technologies. From social media to online ordering, they've learned to embrace – and love – digital solutions. They therefore hope and expect to see brands diversifying their on- and off-premise digital ordering capabilities to suit their evolved expectations.

4 APP Case Studies

A | BARTLETT MITCHELL



In July 2020, BM announced partnering with Dynamify. **PEARPAY** | Bartlett Mitchell’s contact-free food app enables customers to order food right to their desks, earning rewards whilst minimising the risk of transmitting coronavirus and forms a major part of the company post-lockdown strategy. **BESPOKE** | The app is configured to suit bespoke requirements of clients with allergen filtering, time slot reservations for restaurant access, scheduled desk deliveries. **PAYMENTS** | The App allows customers to avoid queues via preordering and mobile self-checkout functionality, as well as automatically handling payments, loyalty and receipts. **COMPLIANCE** | The app meets Government guidelines set out in its “Working Safely During Coronavirus” report and will act as a key tool to support social distancing measures set out across Bartlett Mitchell’s nationwide client base. **DYNAMIFY** | Dynamify’s plug-and-play cloud technology enables caterers to set up a workplace restaurant ready for digital ordering in under 2.5 minutes – with no external visitors required for installation.

The Early Adopter B | ELIOR

In February 2020, Elior UK partnered with Dynamify. **CONTEXT** | The Elior-branded app powered by Dynamify was introduced for busy consumers to purchase food more conveniently via mobile order-ahead & self-scan functionality. **ROLL OUT** | Deployment was planned across over 100 Elior sites - from offices and universities to hospitals - throughout 2020. **PAYMENT** | Payment is handled automatically through the app, along with paperless receipts, loyalty cards, and promotions. Users can also view menu information (allergens and nutritional content). **DYNAMIFY** | Dynamify’s technology provides Elior with insight into customer behaviour, predictions of customers’ lifetime value via machine learning to be leveraged for marketing). Dynamify’s plug-and-play cloud platform, fully integrated with Elior’s systems, features back-office management tools inc. data entry, inventory and customer support.

Source: Top - Bartlett Mitchell, August 2020;
Bottom - Elior Website, February 2020

C | VACHERIN



In May 2020, Vacherin partnered with Dynamify. **DYNAMIFY** | Dynamify allows customers to skip lines with preordering and mobile self-checkout functionality, the app automatically handling payments, loyalty and receipts. Dynamify’s plug-and-play cloud platform enables Vacherin to set-up a workplace restaurant for digital ordering in under 2.5 minutes - with no external visitors required for installation. **CONTACT FREE** | Contact-free ordering is particularly important during COVID: virtual queuing promotes social distancing, while contactless payments and paperless receipts and loyalty remove unnecessary human contact. **ROLL OUT** | Vacherin are mobilising the app across sites and working with clients on communicating the new measures and technology in place. **EFFICIENCY** | Restaurant staff save 60 seconds per order through the app by removing the need to enter customers’ orders into the point-of-sale, process cash and card payments, or handle receipts and loyalty stamps.

D | SODEXO

In September 2020, Sodexo confirmed partnering with Dynamify. **TECHNOLOGY** | Sodexo’s solution enables consumers to buy from its restaurants and retail outlets, or to access delivered-in options at the touch of a button, as well as ordering hospitality for meetings. **ROLL OUT** | Already deployed successfully in Sodexo’s Asian operations, the app is adaptable to different environments and is currently being rolled out across corporate sites and universities over the next year. **CUSTOMISATION** | The app allows personalised content and tailored promotions and will enable Sodexo to further support offer development and build loyalty. Crucially, it removes shared touchpoints and eliminates physical queuing as companies manage social distancing.

Source: Top - Vacherin Website, May 2020 |
Bottom - Sodexo website, September 2020

10

App 1

A | DYNAMIFY



Dynamify is a market leading, all-in-one platform using technology, data, and AI to enhance service delivery and margin. The company is operating in 3 continents, 5 countries and 30 cities.

Founded in 2015 by Maxwell Harding, Dynamify supplies software as a service to contract caterers so they don't have to build their own online ordering platforms. Its contact-free technology has become essential for caterers to resume operations during Coronavirus.

A MODULAR PLATFORM | A powerful, modular platform built with customers' needs in mind. Available functions include: scan & go, pre-ordering, pre-payment and receipts, delivery, employee allowances, e-loyalty, push and in-app notifications, user feedback and support, personalised nutrition and allergens, plus many more bespoke features.

AN INTELLIGENT DASHBOARD | Every aspect of the customer app is powered by a versatile dashboard allowing to: record every customer action and transaction (enabling operators to understand customers like never before); personalise customer engagement by utilising automated tools to build marketing campaigns; manage back office activities effectively, from individual outlets to an entire business operation

SET-UP | No external visitors are required on site to deploy Dynamify's plug-and-play cloud technology and a new restaurant can go-live with digital ordering in under 2.5 minutes.

Contract Caterers powered by Dynamify include: Sodexo, Elior, Bartlett Mitchell, Vacherin, Lexington, Good Eating Company, CH&Co, Gather & Gather and Fooditude.

Source: Dynamify Website, October 2020

App 2

B | KAFOODLE



Kafoodle is an award-winning food tech company launched in 2016 with a cloud-based B2B platform to help Hospitality clients digitise their recipes and menus.

In recent months, the company has evolved their business model to offer a digital ordering solution for reopening foodservice operators needing to implement social distancing guidelines, which can be setup in a matter of days. The App brings together table ordering, Click & Collect, mobile payment functionality with allergen, nutrition search and labelling. App functions now include:

DIGITAL ORDERING | The newly created digital ordering solution expands on the functions offered by Kafoodle's Kitchen Management software, helping foodservice businesses to trade whilst also remaining allergen compliant. Businesses can digitalise their menus, process digital orders and payments from website or App, and offer a variety of collection methods to customers.

MENU BROWSING | Customers can browse and order from a full menu and personalise what they see by filtering menu items that contain allergens, or simply by specifying dietary requirements.

FEATURES AND BENEFITS | Quick set-up for digital interactive menus with full pre-order and pay functionality; seamless connection from kitchen to customer; full allergen, dietary and nutritional search for consumers; support of social distancing with order at table and click & collect options; integration with multiple payment solutions; business intelligence reports to focus marketing and menu development activities

Source: Kafoodle Website, October 2020

10

B “TECHDINE” DISRUPTION

*Do you know there’s a **techdine** or **techdine247** revolution unfolding across Europe and the rest of the world to flexi-feed workforces 24/7 at work and home?*

- With foodservice operators adapting to remain open and transition to digital technology (i.e. apps) to engage workforces and with **customers learning to embrace – and love – digital solutions...** we challenge you TODAY to think about disrupting the traditional service model for those you feed every day who may be **engaged diners, futurists and cautious planners.**
- Rather than start with the foodservice operator, TAF propose you start with the customer (your employee), **identify their needs, adapt best practice around them, build trust, improve relationships** and seek to feed your workforce anywhere/anytime. This is about evolving the foodservice solution around your customer (your workforce).

- **STEP 1:** Starting with the 13 CUSTOMER INSIGHTS, TAF presents a solution that identifies with meeting the following:

1. Mind Body Wellness
2. Quality vs Pricing
3. Safety | Top of Mind
4. Cashless Payments
5. Tech Today
6. Rise of the Ready-Meal
7. Townie Takeaways
8. Couples Catering
9. Fast Food Gen-Zers

- **STEP 2:** Moving on to the 10 DISRUPTIVE FOODSERVICES, TAF suggest the same solution builds on:

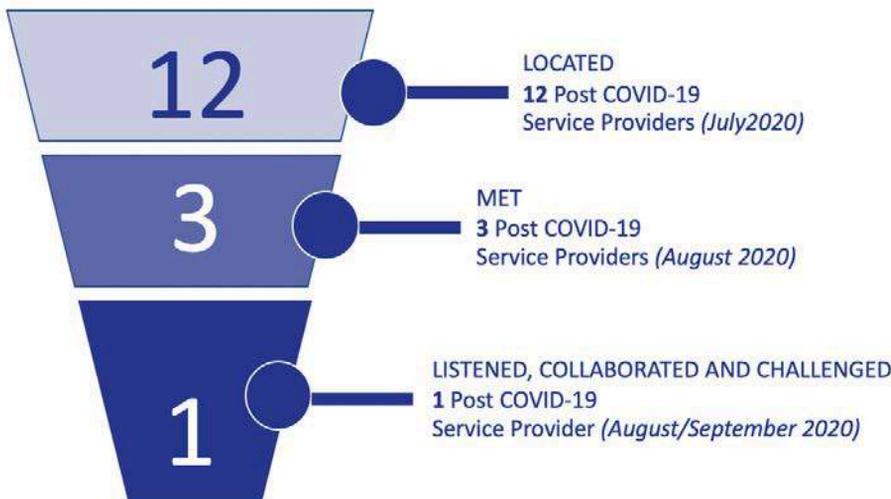
1. Dark Kitchens/CPUs
2. Experiential Marketing
3. Micro Markets
4. Meal Kits/Ready-To-Cook
5. Desk Delivered
6. Foodservice Collaborations

The above achievable without having to compromise or deliver additional revenues streams to top-up the contract.

B FINDING A NEW SOLUTION

- In August 2020, TAF completed extensive qualitative and quantitative online research, to seek out the latest tech foodservice innovations, based on our clients asking us **how to**: (i) move away from a staff restaurant style service, (ii) provide quality food cost effectively 24/7 to a phased working population and (iii) feed their people as effectively at home as well as work, whilst managing costs.
- We uncovered 12 new potential foodservice solutions across the UK, Europe and the rest of the world. We met with 3 potential service providers but ... **only 1 foodservice solution stood out as the most relevant, reliable and timely, around 24/7 delivery.**

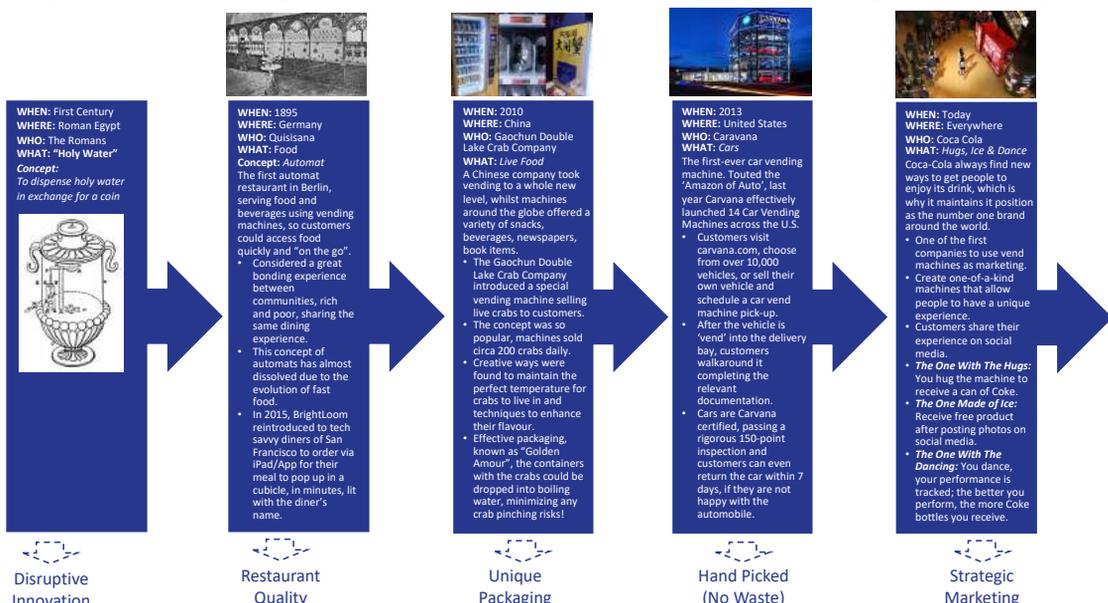
Diagram: TAF’s funnel to finding a new foodservice solution post COVID-19



B RESEARCHING THE MARKET

- Tech Vend machines have come a long way since their inception. Across the UK, they're synonymous with micro-markets (dispensing fresh milk to customized pizzas, ready to eat) but **they could be so much more, as the rest of the world knows.**
- They're great for any business, as a source of revenue, even as an imaginative foodservice solution to: drive disruption, deliver quality, create brand awareness, provide at work and take-home, interact with customers, deliver no food waste and, even be a part of your strategic marketing. Traditional complexities like inventories, machine health & compliance have been a challenge but not in today's digital world, data accessible in real-time.

Diagram: 5 Pioneering tech companies who've successfully evolved global vending



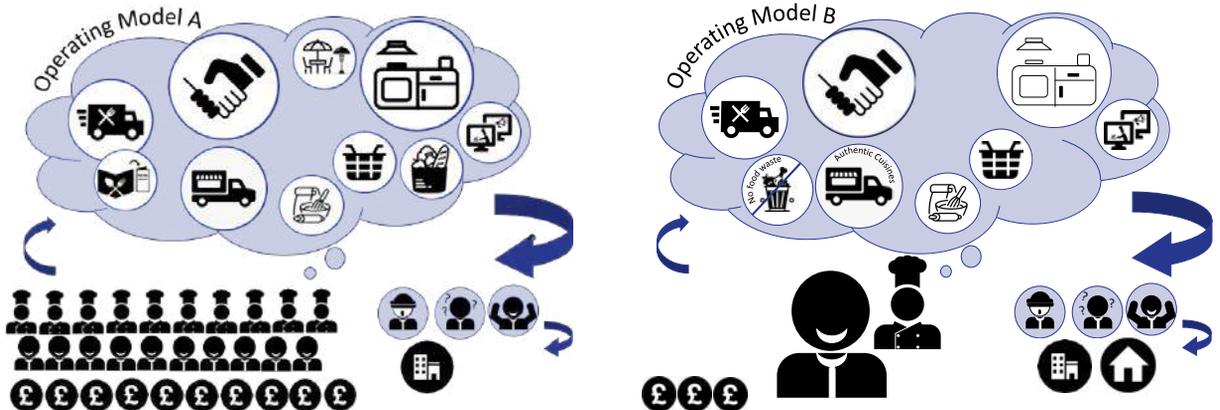
B A NEW WAY OF THINKING

- TechDine24/7 is a new way of thinking. It means:

Tech = Technology
Dine = Dining (including Fine Dining)
24/7 = Round the clock delivery

- Rather than taking the foodservice model you have, in a post COVID-19 climate, it's about lateral thinking and changing the model; working with your contract caterer or if you self-manage.
- So, taking 5 benefits from researching the market...
- Disruptive Innovation + Restaurant Quality + Unique Packaging + Hand-Picked (No waste) + Strategic Marketing
- Let's see how a new model could look...

Diagram: Evolving your current foodservices to deliver a post COVID-19 24/7 solution



B COST BENCHMARK

Diagram: Evolving your current foodservices to deliver a post COVID-19 24/7 solution

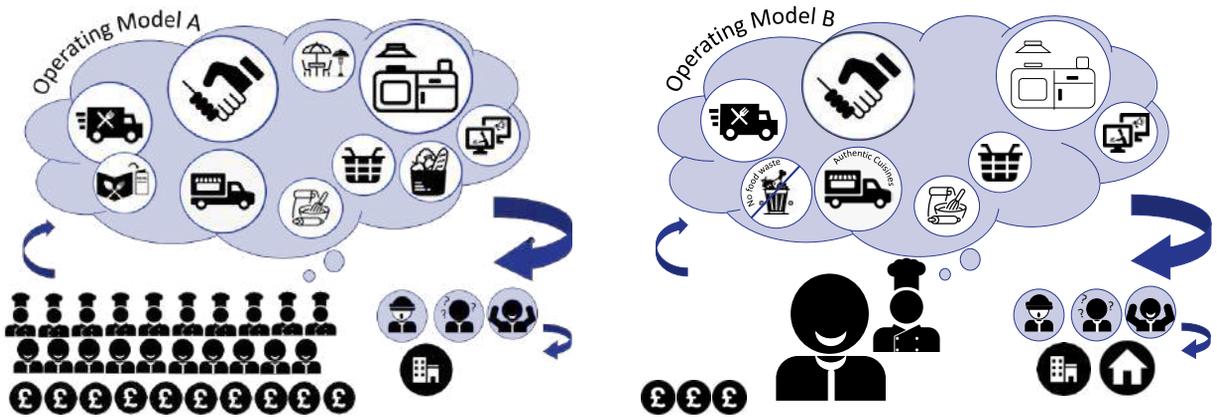


Table: Benchmarking a pre-COVID-19 corporate site against a post COVID-19 24/7 solution

	COST BENCHMARK	
	OPERATOR A	OPERATOR B
Catering Team	7 Team Members: Catering Manager, 2 x Chefs, 4 x Catering Staff	1 Team Member: On Site Staff Member to replenish and clean machines
Annual Labour Costs	£207,600.00	£20,800.00
Daily Labour Costs	£798.46	£80.00
Daily Labour Cost Per Hour	£99.80	£10.00
Labour Costs Per meal	£3.99	£0.40

TAF's assumptions of the above benchmark:

- B&I Site Catering Operation based in the City of London
- 260 working days p.a. (52 weeks x 5 days), 8 hours working day
- 200 on site to feed - 200 meals/servings per day
- Operator A - Traditional Contract Catering (exc. Equipment/Catering costs)
- Operator B - Remote Managed Service based on a 3-year lease rental deal

Note: Operator B costs are allocated as above the service is available 24/7

LAUNCHING IN THE UK TODAY

OPERATOR B | BONCULINA



NEW to the UK October 2020 **BonCulina**

Global Foodservice Contractor, BonCulina, today launches a 'simply different foodservice' approach to the UK market, providing affordable and delicious meals from around the world, using the patented Torus Pak plating technology. The company intent on striving towards a 'zero food waste vision' and investing part of its profits into the 'A Meal for a Meal' CSR programme.

BonCulina propose a foodservice approach designed to operate restaurants and canteens of high standards without a kitchen or even a chef on site (although they could work effectively with reduced on-site catering teams). Through the reduction in the number of operating elements, particularly labour, BonCulina reduces operational cost and capital.

VARIETY | Operating in several other countries, BonCulina's disruptive business model brings together hundreds of meal varieties and the best international manufacturers in just one place. Its current top six most popular UK choices are English, Italian, Indian, Chinese, American and French cuisine.

FLEXIBILITY | A flexible option, it operates smart logistics, to enable customers to pick and choose from the finest meals without being tied into exclusive contracts and multiple delivery contracts. Each meal is "lovingly produced" and quality assured.

COST EFFICIENCY | BonCulina aspires to be different in foodservice by delivering cost efficiency and simplicity through a vast central recipe database. From the very best ready meal manufacturers and vegan to free-from, to create a truly global larder of high-quality delicious dishes. This, in combination with optional operating methods offers flexibility and consistency beyond most clients' needs and requirements.

WASTE EFFICIENT | Meals are frozen and packaged individually, helping to manage fluctuating numbers and safety issues in the new Covid landscape, with added benefits such as longer shelf life and easy storage.

RESTAURANT QUALITY FOOD | With customer pressure driving demand for ever more choice and restaurant quality food, BonCulina brings together delicious, high quality meal options across all flavours.

NEVER SEEN BEFORE TECHDINE SOLUTION

OPERATOR B | BONCULINA

5 Unique Foodservice Features:

- 1: **SOURCING** | Authentic meals and snacks to cater for all tastes
- 2: **COOKING** | NEW Michelin Star Chef-created recipes
- 3: **DELIVERING** | NEW Premium Tech (microwave scanning tech) for workplaces
- 4: **SERVING** | NEW Patented Torus Pak recreates restaurant plated dishes
- 5: **DISTRIBUTING** | UK-logistics to distribute same choices to employees' homes



We have seen unprecedented demand for flexible foodservice solutions in an environment of rapid change during the pandemic. Our decision to increase capacity and expand operations in the UK, reflects the strength of the market. "We've combined our exceptional logistics and UK delivery capacity with new technology and delivery methods to offer unprecedented flexibility and on-demand choice. CHRIS O'NEILL, BONCULINA SPOKESPERSON

Source: <https://www.finanznachrichten.de/nachrichten-2020-10/50940787-global-foodservice-contractor-bonculina-expands-uk-operations-to-increase-share-of-gbp-10billion-uk-market-004.htm> October 2020





FUTURE FOCUS



#TechDine

#Flexi-Feeding

#FoodserviceRevolution

TAF Talks: Is your organisation ready to be a part of a Foodservice Revolution around digital transformation of your foodservices?

YOUR NOTES



NOTES | BLUE SKY THINKING

NOTES | TAF CLARIFICATIONS

NEXT STEPS

If you want help and support in preparing yourself and your teams for the unravelling digital revolution around the world right now to flexi-feed your workforce (and our economy) 24/7 at work and at home, contact us TODAY for the most **relevant, reliable and timely** post COVID-19 safety-oriented, **fresh, forward-thinking, innovative, app-savvy and sustainability focused solutions.**

Tracey Fairclough | Managing Director

M: +44(0)7968 796964

E: tracey@tafcateringconsultancy.com

Or visit us at: www.tafcateringconsultancy.com

Alex Mingoni | Consultant

M: +44(0)7539 7388897

E: alex@tafcateringconsultancy.com

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