

## modern recipe

Client: Sodexo (UK&I)

Agency: **Without**



Sodexo, one of the world's largest employers, is known for facilities management. They look after the running and maintaining of corporate offices, so companies can focus on what they do best. Part of this means supplying food; in this case, running the in-house canteens of white-collar offices such as accountancy and legal firms.

By 2018, the corporate catering sector was increasingly challenging. Analysis of the top 50 operators in the UK food service marketplace showed a year on year decline in margins for the third year running (to 5.8%). Meanwhile, long term trends showed that canteen provision by employers had nearly halved in the decade from 1995 to 2015.

<Redacted confidential data>

Facing such headwinds, Sodexo wanted to revamp their food offer with a new brand that would convince corporate clients of its value, and persuade the clients' workforce to spend their time and money in those spaces.

Without's solution was Modern Recipe.

Within 2.5 years of launch, this new brand would deliver:

## New Catering Sites

<Redacted confidential data>

## Sales Uplift

<Redacted confidential data>

## Margin Increase

<Redacted confidential data>

## Contributed to new & retained contracts

<Redacted confidential data>





# Project Overview

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## The brief

The client team wanted a brand that could transform and relaunch under-utilised corporate canteens for new and existing clients. This new brand needed to be delivered within existing capabilities and operational structures. The scope of the rebrand covered every aspect of the corporate food offer: the proposition, the name, identity and messaging; the customer experience (service style, uniforms, interiors, packaging, signage, point of sale); operational details from tableware to seasonal menu cycles; marketing comms and corporate sales tools.

**“Create a B2B contract catering brand proposition that is competitive and commercially viable.”**

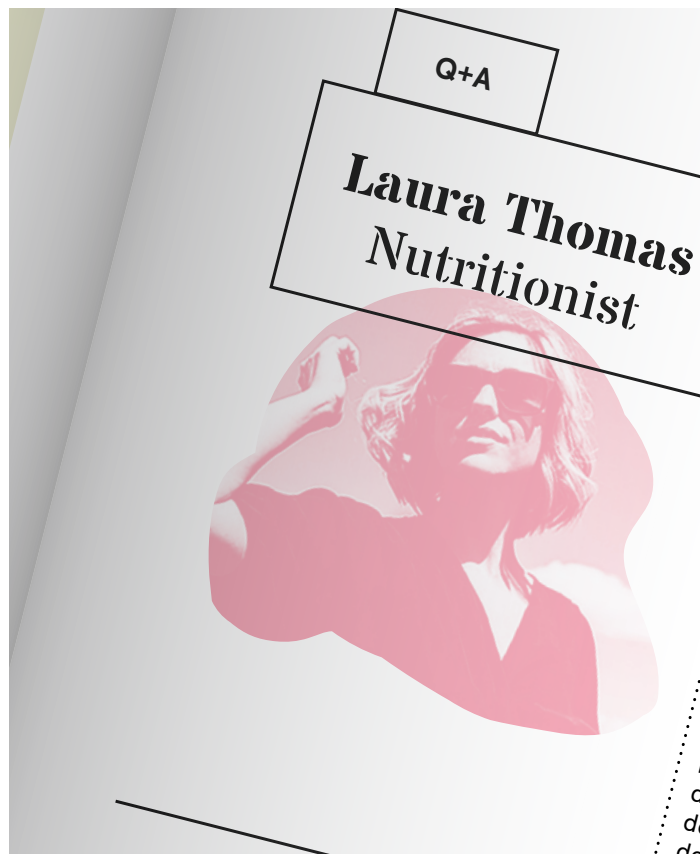
From client brief, 2017

## Key facts

Launch date: Sep 2017

Period considered: 30 months, Sep 2017 - Mar 2020

Design fees: Redacted Confidential Data



## Targets and goals...

### Year One

Proof of concept

Win board sign-off of new concept to unlock budget for implementing pilot site

Introduce pilot on a client site (first, having convinced a client to accept the concept)

Increase sales on site <Redacted confidential data>

Buck the declining trend in margins seen across the industry

### Year Two

Retain & win food-only contracts

Deliver Modern Recipe as a commercially viable food operation, with positive sales and margins

Retain clients by relaunching the new proposition in key accounts <Redacted confidential data>

Win back ground in food-only contracts, with revamped brand credibility

### Year Three

Contribute to winning new integrated facilities management contracts

Utilise the brand as a differentiator in integrated contracts. As the majority of facilities management services (such as cleaning and maintenance) are highly commoditised, Modern Recipe provides a vital opportunity for stand out.

“Facilities management services are commoditising and organic growth is hard to find. The uk market is one of the most competitive in the world. There are significant challenges for those that fail to adapt.”

Growth Opportunities in the UK FM Market, Forecast 2025.

## Overview of the market

### A sector in decline

By 2018, the corporate catering sector was facing challenging long term trends. Analysis of the top 50 operators in the UK food service marketplace showed a year on year decline in margins for the third year running (to 5.8%). Meanwhile, studies from the labour research department showed that canteen provision by employers had nearly halved in the decade from 1995 to 2015.

### Changing consumer behaviour

Much of this pressure can be attributed to the growing range and quality of high street vendors in urban locations. These deliver to consumer demand for high quality, healthy, all day nutrition. From 2010-15, the UKs stock of restaurants rose by 20% in a market with 6% real-term growth in spending. Pret a Manger, one of the biggest competitors for lunchtime spend saw revenue quadruple from 2007 - 2017 with a continued rise of 12% from 2018-2019. Illustrating this trend, in 2017, Bloomberg opened their new 4,000 employee HQ in central London announcing it would be a “no-cafeteria zone” encouraging staff to leave the office during their lunch hour.

### A new generation of competitors

Competition from the high street continues to grow, with the advent of food delivery apps. Beyond traditional retail models, consumers now have the option of ordering their favourite food straight to their desk from brands like Deliveroo and Uber Eats. City Pantry, a new startup model for corporate catering, connects food vendors directly to corporate customers. Still a young business, it already has over 1,000 monthly corporate customers and was recently acquired by JustEat.

At the same time, “Facilities Management services are commoditising and organic growth is hard to find. The UK market is one of the most competitive in the world. There are significant challenges for those that fail to adapt.” Growth Opportunities in the UK FM Market, Forecast 2025.

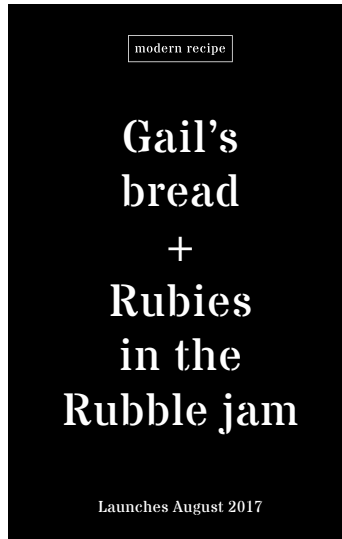
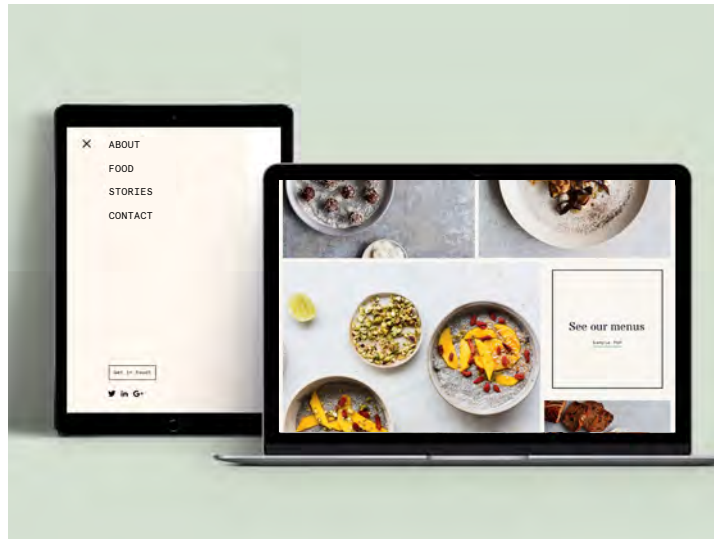
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Sources :  
Workplace report 2015, Labour Research Department  
CGA Peach Report, 2016  
Financial Times  
Food Service Growth Report, Alix Partners  
Companies House accounts

# Project Overview

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## Defining the proposition

While a made-to-order proposition was assumed to be what corporate clients wanted, it is difficult for sales teams to bring to life, and for prospective clients to imagine. More powerful we felt, would be to show exactly what the end user would experience. This led to our first strategic decision - this wasn't a B2B brand with B2C products. This should be a single brand with consumer appeal. If the corporate client saw that their workforce would love it, they would love it too.

More fundamentally, we did not believe consumers wanted the choice of food themes. Such silo-ed food styles were unlikely to transform visit frequency. Who wants the novelty of street food everyday?

Instead, based on consumer profiles and market insight, we worked to create a single, universal food offer that would appeal to modern professionals. Healthy, balanced, natural, artisan, with light global influences. The sort of food you'd want to eat all day, everyday.

Our research showed a growing appreciation for how food and environment affected wellbeing and therefore productivity. We argued that this offer wasn't just about better cafés; it was about better workplaces. Modern Recipe became a contemporary, all-day food proposition that transforms under-utilised canteens into vibrant assets - buzzing multi-purpose spaces where colleagues could meet,

work and relax over food & drink - encouraging well-being, loyalty and collaboration.

Underpinning all this was a simple brand statement:

Contemporary food  
+ Creative spaces  
= Thriving workplaces.

This is our Modern Recipe.

This proposition shaped our design of the whole brand experience, from the menu dishes, to the identity, from service style to interior spaces.

Contemporary food  
+  
Creative spaces  
=  
Thriving workplaces.

This is our  
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# Project Overview

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## Designing the experience

Corporate catering has traditionally featured heavy, corporate branding. It doesn't feel human or believable. To connect with customers, we evoked the language of best-in-class urban F&B brands: relaxed, generous, show-don't-tell. Like the food, the graphic elements suggest an artisan touch, whilst its stripped back aesthetic ensures universal appeal. The ID system

is also practical - it sits comfortably in any corporate branded environment, and is deconstructed into simple elements, a kit of parts for ease of rollout.

We designed interiors with productivity in mind. From the layout of flexible all day spaces that would encourage collaboration (while encouraging another flat white), to the specification

of natural outdoor materials for a sense of well being. Details from relaxed uniforms to natural crockery, down to the sustainable bamboo trays, were chosen in line with the brand values.

Wayfinding, point of sale, packaging, signage were all designed with clarity and impact in mind, as functional and effective as it would need to be on the highstreet.

## Communicating the brand

For launch, a series of studio scenes combining contemporary ingredients with interesting materials and shapes highlights product benefits, while additional food photography was styled to emphasise unfussy, naturally cooked meals.

A communications campaign, across on-site posters, hoardings, pop-up installations and internal emails introduced the brand to consumers. In parallel, a suite of B2B material, from presentations to websites to printed brochures, were used to emphasise workforce benefits to corporate buyers.



## 1. Concept proven

The proposition and brand was unanimously approved by Sodexo's Directors, releasing investment for the pilot site. It launched in <Redacted confidential data> an international HQ in central London in Autumn 2017. <Redacted confidential data> This was identified as an ideal test location as its proximity to central London and its staff of discerning young urban professionals made it a highly competitive environment.

The existing canteen was refitted in line with the new Modern Recipe brand. The concept was carried through to revamped interior spaces, menu displays & point of sale, signage & packaging, and an

internal comms plan for launch. The results were immediate.

In the first month after launch, the site saw an <Redacted confidential data> **uplift in sales** - a testament to appeal of the brand, and the effectiveness of launch marketing. But brand success has outlasted the initial peak of interest. The year after launch saw a <Redacted confidential data> **sustained increase in sales**, the brand continuing to deliver to customer expectations.

The brand was so well received by that **Sodexo's contract was renewed**, without being put out to tender. <Redacted confidential data>

"I truly think it's transformational, the creativity that's gone into Modern Recipe, you can see from the team's response they are really enjoying the work they are doing now."

Senior Client  
<Redacted confidential data>

## 2. Food-only contracts retained and won

<Redacted confidential data> The pilot proved so successful that internal teams across Sodexo have rapidly adopted Modern Recipe as a tool to retain contracts and bolster valued relationships. **Within 2.5 years, Modern Recipe has been introduced in multiple sites across the UK and Ireland, well ahead of original expectations.**

From the start, one of the key goals of the project has been to bolster Sodexo's reputation in catering services, a key success metric being new food-only contracts. And one of the first tests of effectiveness was in the tender for <Redacted confidential data>. This was a flagship food-only contract that all key industry operators were after. In addition, the long standing incumbent fought fiercely to retain the contract. In the face of this competition, **Sodexo was awarded a five year food services contract** <Redacted confidential data>, to provide food and retail services at seven sites in 4 countries. <Redacted> Securing this contract proves the value of the Modern Recipe brand in food-only sales.

<Redacted confidential data>

"As the head of food for Corporate Services, tasked with building and growing our presence in food only contracts it was vitally important that we could deliver against the current market expectations and convince clients that we had the best solution even though we had been out of the spotlight for many years. We are growing in food-only and being invited to tender in places we would never have been 5 years ago."

Sodexo <Redacted confidential data>

"It is demonstrating to internal stakeholders that Modern Recipe can deliver on profitability and grow the business. <Redacted confidential data>"

Sodexo <Redacted confidential data>



### 3. A commercial success

Since roll out, Modern Recipe has proved to be a resounding commercial success. Blended data at the end of 2019, across all live sites in the UK & Ireland showed **an average increase in turnover, increase in transaction value and increase in margins** <Redacted confidential data>. Across the sites, Modern Recipe has met or exceed sales targets across all metrics.

One of the biggest transformation was seen at <Redacted> a global HQ in Cambridge. Since Modern Recipe replaced the existing canteens, over 12 months, **workplace dining rates have increased by 45% and revenue risen by 60%**. The significant rise in dining rates indicates a large proportion of the 60% revenue increase can be attributed to higher demand and usage. The remaining 15% revenue rise was thanks to increased spend per head, illustrating that people were willing to buy more and spend more on what they bought. Considering the availability of external high street options (and even an artisan street food market just outside one of the offices), this demonstrates Modern Recipe's ability to win back market share in its own right.

In 2018, the catering contract for <Redacted confidential data> was put up for tender. Workplace surveys showed employees there were asking for more flexible, healthy and inspiring options. Competition for the contract was fierce, but with Modern Recipe, Sodexo was able to demonstrate they understood what customers wanted, and ultimately prevailed. Since launch, **spend per head has increased** <Redacted confidential data> **and average daily sales risen** <Redacted confidential data>.

**"I'm so chuffed with it... a complete difference. It looks stunning and so open. I'm hearing nothing but great things about the food and environment. Yesterday I saw more people than ever using the room at 10.30am and then again at 14.30 and lunch time was buzzing."**

Client <Redacted>

**"Modern Recipe has been a huge success... The spend [per head] is slightly higher than before. People, surprisingly, are willing to pay it."**

Client <Redacted>

# 4.5%

Increase in  
workplace dining

# 60%

Increase in  
revenue



# Results

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## 4. Differentiating Sodexo's offer

Modern Recipe has proved to be an invaluable asset for Sodexo. In the 2.5 years since launch, **the brand has helped to secure millions in new and retained business**, <Redacted confidential data>

Now fully established as one of Sodexo's blockbuster brands, not just in the UK, but globally, Modern Recipe has been deployed across 9 countries in 7 regions. <Redacted confidential data>.

Initial expectations for new business wins have been exceeded, with the concept being taken beyond UK&I across Europe, Asia and North America. In New York, the brand is being used as part of a marketing effort to recast Sodexo as a credible foodie brand with appeal to modern consumers. Not only has Modern Recipe succeeded in winning catering contracts, it is helping push the whole of Sodexo's business forward and change perceptions of the parent brand.

“Through the development and roll out of Modern Recipe, [Sodexo] now has a compelling brand that is successfully helping win business and meeting consumer needs.”

Sodexo <Redacted confidential data>

Sources:  
Sodexo internal data  
Sodexo client interviews



## Press and Advertising

There has been no ATL or digital marketing spend in the period considered. Prior to launch at each site, there has been limited internal communication and marketing. This output was a part of the project scope, and its results can be attributed to the design's effectiveness.

## Price changes

The objective of this project was to reach a modern, urban audience with a proposition they could believe in. This meant reframing the food offer around health, flexibility and choice. The food proposition has changed to such an extent that it has not been possible to compare before and after prices like-for-like. Portion sizes, menu items and service style have all changed. For example, self service salad bars now offer a choice of sizes. Across all sites, spend per head has increased, but it has not been possible to quantitatively attribute this to larger purchases, or increased prices. What we do know is that spend per head has risen alongside dine-in rates, illustrating that customers are happy to spend more on Modern Recipe, compared to the previous offer, proving the demand that the brand has created.

## Menu changes

During initial strategic conversations, it was clear that consumer expectations and tastes around food were changing and that the proposition needed to keep pace. The Modern Recipe food offer was born from our focus on delivering to consumer trends, a dramatic shift to healthier, more sustainable and more flexible options. The new menu is an output of the brand strategy and within the scope of the project.

## Location, facilities and capabilities

Across all sites, Modern Recipe replaced an existing canteen. When comparing performance, location, convenience and the scale of the facility can be considered a constant. Sodexo also used their existing chefs to deliver the Modern Recipe menu with no fundamental change in resources used to deliver the new product. The look and feel of the canteens did change significantly, and is part of the design scope of the project. Creating more flexible and welcoming spaces was a large component of this brief and our work defined the space and interiors across Modern Recipe sites.

## Workforce

All launches of Modern Recipe have been into existing office centres where there has been no other major changes - factors like size of workforce and attendance have been constant, allowing for a like for like comparison. The periods considered exclude the start of the pandemic and subsequent lockdown.