

CONSUMERISM AND HEALTHCARE DINING

THREE WAYS TO IMPROVE SATISFACTION



Consumerism is having a major impact on the world – including the healthcare industry.

The concept relates to consumer behavior: how people shop, what they like and their expectations. It recognizes that modern consumers have specific demands and are accustomed to providers meeting their specific needs.





Insights that help define today's modern consumers and their expectations include:

96% of Americans own a smartphone today, compared to 35% in 2011¹

87% of consumers believe brands could deliver more consistent experiences²

64% of customers expect real-time, on-demand services, regardless of the channels they use³

CUSTOMERS ARE
3X
MORE LIKELY

to recommend a brand after they've had a positive interaction⁴

An area already impacted by this major trend is healthcare dining. Today's patients aren't like patients in the past, who accepted "hospital food" for what it was. Now they expect food with qualities that resemble what they like to eat in their daily lives — **meals that are comforting, delicious, healthy, appetizing and sustainable**. Similarly, staff members also crave quality dining options on-site so they can enjoy greater job satisfaction and deliver higher levels of care.

Healthcare entities have a lot to gain by fulfilling consumers' dining desires — namely, happier patients and staff and higher satisfaction scores. To improve dining options, healthcare organizations can evaluate new dining opportunities — both for patients staying in the facility and for staff members who dine at on-site cafes.



Deloitte's Consumer Priorities in Health Care Survey⁵ examined a number of interactions consumers face throughout their healthcare experiences. It found that consumers' expectations in healthcare are shaped by the customized and convenient experiences they have grown accustomed to in other industries, such as retail and banking.

PATIENT DINING

Within the next 12 months, 47% of healthcare organizations will invest in a technology initiative to capture in-depth patient experience metrics. — NRC Health, 2019 Healthcare Consumer Trends Report⁶

Consumers are adapting to and excited by access to technology and convenience at every step of the dining experience, including ordering takeout food on their mobile devices. As technology advances in these areas, consumers expect similar capabilities when receiving in-facility medical care.

Patients want what they are used to outside of the hospital setting — variety and comfort foods. This need is heightened when they are in unfamiliar, stressful environments. What's more, they want a “feeling of home” experience when they are dining away from homes.

Trends in Technology

The entire food scene is changing, and restaurants are scrambling to keep up. They know today's consumers want conveniences like online ordering and reservation capabilities, home delivery and self-service kiosks. In fact, of the 61 million restaurant orders made annually in 2018, 5 percent (2.8 million) were made online, [according to NPD Group⁷](#).

As a result, foodservice is undergoing major changes, including the growing importance of restaurant-ordering technology, to keep up with consumer demand:

- ▶ Nearly every restaurant chain offers online ordering
- ▶ Many establishments are adding self-service kiosks⁸, such as the popular salad and sandwich restaurant Panera
- ▶ More restaurants offer reservations through apps like OpenTable and Yelp than ever before

Implications for Healthcare

When people are in the hospital, they expect their lives to be tech-centered, just as they are at home. To meet this trend, healthcare organizations must embrace the next frontier in food ordering convenience, such as:

- On-demand meal options
- Hotel-inspired room service meal ordering processes
- Ordering via web-based, in-room and mobile meal ordering applications





Trends in Variety and Comfort

Today, dining habits and food preferences are changing in all generations. These preferences impact healthcare as much as they impact restaurants.

The dining preferences of **Generation Z**, born after 2001, include:

- ▶ Getting everything on demand through food delivery.
- ▶ Wanting to feel like their food experiences were crafted just for them.

The dining preferences of **Millennials**, born between 1980 and 2000, include:

- ▶ Preferring dining establishments that allow them to customize their choices.
- ▶ Having a lot of snacks and small plates versus one main dish.

The dining preferences of **Gen X**, born between 1965 and 1979, include:

- ▶ Knowing their fries were hand-cut, burgers were individually prepared and condiments were made in-house.
- ▶ Ordering comfort food classics, like pizza and burgers.

The dining preferences of **Baby Boomers**, born between 1946 to 1964, include:

- ▶ Choosing tried-and-true favorites but appreciating innovative culinary twists on familiar dishes.
- ▶ Relishing comfort foods but considering health issues like calories and cholesterol counts.

Implications for Healthcare

When people are in the hospital, they look forward to meals as a welcome distraction from their surroundings - food preferences don't suddenly change just because he or she is in a hospital bed. Healthcare entities can meet patients' multi-generational desire for variety and comfort by incorporating more dining initiatives.

- **Dining Variety** — Facilities can meet this need by incorporating a rotating menu of dishes and flavors. Offer limited-time specials, just as restaurants do.
- **Healthy Options** — Healthcare entities should offer comforting, yet healthy food options everyone can enjoy, such as fresh vegetables and fruit, sustainable and local ingredients, gluten-free items.
- **Customized Options** — Provide mix-and-match ingredients for dishes and meals.
- **Comfort food** — Bring consumer favorites into the hospital, such as pizza, smoothies and mac and cheese.

Trends in Dining with a “Feeling of Home”

Today, four out of five meals are prepared at home because that's where consumers prefer to be, according to NPD Group⁷. This has major implications for healthcare organizations because while in the hospital, consumers will still desire food that has a made-at-home quality.

One of the biggest menu demands that has shaped the marketplace is an interest in eat-at-home meals. Further, 50 percent of dinner meals⁹ purchased from restaurants are actually consumed at home. Nearly 18 percent of at-home meals included at least one ready-to-eat food product from the foodservice channel, an uptick from 15.5 percent in 2015.



“This shift to a more individualistic foodservice delivery model has improved the quality, freshness and convenience of hospital foodservice. From an Aramark Healthcare perspective, our recipes were developed in partnership with our internal culinary development team and chefs across the country working in our partnering facilities to meet the special nutritional requirements of respective patient diets.”

— Sharron Lent, RDN, LD, Director of Program Development for Patient Dining and Clinical Nutrition

Implications for Healthcare

The industry is seeing dining trends based on providing freshly prepared items, which are driving hospital foodservice operations to migrate from more batch-style cooking to models such as room service. This allows patients to order what they want to eat when they are ready to eat it.

To achieve this consumer trend, healthcare organizations can offer patients a dining experience as if they were eating at home, for example:

- Add comfort food options on room service menus — include familiar options, like pizza, pasta, wraps and soup
- Provide the ability for patients to customize meals and plates — include ingredient choices in everything from salads to main dishes
- Deliver meals in state-of-the-art temperature-appropriate systems — these keep hot food hot and cold food cold

An excellent example of achieving this trend is Aramark's Little Chef Series, which is designed to satisfy pediatric patients. Healthcare chefs bring both comfort foods and the latest foodie trends to patients. Seasonal selections, restaurant-quality experiences and technology (CBORD) give the patients personalization options which helps the program consistently score a 4 or higher (on a 5-point scale) on patient surveys.

CAFÉ DINING FOR STAFF AND VISITORS

41% of healthcare consumers care just as much about taste as health benefits, wanting food that is equally tasty and nutritious. — [What's Trending in Healthcare, April 2017, Datassential¹⁰](#)

Healthcare staff members have limited time to enjoy their meal breaks and still feel nourished and satisfied. Often with only 30 minutes to grab breakfast, lunch or dinner, they have to eat on-site. But they'll only choose the facility's cafe if they can get the food they enjoy — and get it served quickly.

And healthcare staff members are as into today's "foodie culture" as anyone else. They are looking for the same food options at work that they enjoy at home.

Trends in Fast Casual Dining

Consumers are moving toward a fast-casual vibe for dining, which features quick, high-quality food at an affordable price. In particular, they want food to be freshly prepared and include better-for-you options, plant-friendly selections and global flavors.

The fast-casual trend is influencing and attracting chefs, restaurateurs and executives across the hospitality industry. Total fast-casual sales growth in 2017 was 9 percent for the top 250 restaurant chains compared to the prior year, according to a Technomic Report¹¹.



Implications for Healthcare

Healthcare entities can meet the consumerism trend toward fast-casual dining in multiple innovative ways in their on-site cafes by offering staff and visitors on-trend food options, such as:

- **Creative healthy menus** — Pursue a variety of healthy menu strategies, including designing new menus, creating new recipes, improving existing favorites and sourcing healthier ingredients.
- **Nationally recognized brands** — Many healthcare organizations are fulfilling the fast-casual demand by incorporating known food brands into their cafes. However, this can be difficult for hospitals without a dining partner to accomplish, especially for smaller healthcare systems.
- **Convenient “on-the-go” and small-site options** — There are many ways that healthcare organizations can add snack-type options to their food selection, and fulfill staff and guests' desire for both convenience and variety. A few ideas to speed up access to food include putting coffee kiosks in heavily trafficked areas, installing vending machines with healthy snacks, offering pre-made sandwiches and providing ordering kiosks in the cafe.



Lankenau Medical Center leveraged national dining trends, industry-level insights and nursing staff input to create a more satisfying dining experience for staff. Updates include ordering kiosks in the café to speed up meal delivery, customized grill ordering and a rotating menu of international dishes. The result was happier nurses, better patient care and revenue growth. The facility has increased growth in dining by over \$150,000¹².

Trends in Plant-Based Diets

Consumers are starting to choose plant-based foods without entirely eliminating meat consumption. Whole grains, vegetables, fruits, legumes, nuts, seeds and herbs become the focal point of a meal, while animal protein is consumed in smaller portions or periodically left out.

Consumers' motivation for going plant-based include weight management, heart health, longevity, digestive health and disease prevention. Other reasons include cost, the environment and animal welfare. Research shows¹³:

- ▶ **60% of consumers** aspire to reduce the amount of meat they eat¹³
- ▶ **77% of hospital diners** are likely to order plant-forward meal options¹³

Implications for Healthcare

Addressing the consumerism trend toward plant-based dining is one of the easiest steps healthcare organizations can take when it comes to updating their dining programs, including.

- Adding more fruits, vegetables and whole grains, as well as beans, lentils, nuts, seeds, herbs, spices and other plant-based ingredients to menus
- Use icons to designate plant-based options on menus
- Start with familiar foods such as adding veggie burgers and tofu dishes
- Educate consumers on healthy plant-based options from health and wellness programs, such as Healthy for Life[®] 20 by 20 initiative



Plant-Based Dining

Some healthcare organizations are already on board with the plant-based trend. According to the Healthy Food in Health Care initiative¹⁴, between 2016 and 2017, 57 percent of its participating hospitals reduced the amount of meat they serve to patients, and 66 percent purchased meat products raised without routine antibiotics. In addition, 82 percent of facilities purchased their food locally, and 61 percent had local or sustainable food purchasing criteria listed in their contracts.

Aramark is also an early adopter of the trend, participating in a plant-based approach to dining with several innovative initiatives:

- Engaging hundreds of chefs in culinary innovation workshops
- Developing over 200 new, seasonal plant-based recipes
- Reducing the amount of red meat in recipes by 5%
- Launching a new plant-forward retail dining concept



To gain all of the advantages of satisfied patients (including higher patient satisfaction scores) and happier staff members (increasing job satisfaction), healthcare systems and hospitals should consider adapting to today's consumerism trend around dining by putting their patient and staff expectations first. When patients are viewed as consumers whose expectations need to be met, they will have a better patient experience. When staff members have better dining experiences, they will perform better on the job — and both of these experiences will directly impact patient satisfaction scores.



Discover how your dining program can move hospitalization forward into an era of modern, tech-supported patient dining in this **mobile-friendly guide**.

If you need help to bring your patient and café dining programs in line with today's consumerism trend, **contact Aramark today.**

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