



2020 Edenred FOOD survey

How has lockdown influenced employees' lunchbreaks and what have restaurant owners around the world been serving up?

The European FOOD (Fighting Obesity through Offer and Demand) program, coordinated by the Edenred Group, aims to promote healthier eating in the workplace through various initiatives. Every year, the Edenred FOOD survey analyzes employees' habits and what restaurant owners offer on their lunch menu.

As a result of this year's unprecedented pandemic-stricken, economic and social environment, the 2020 Edenred FOOD survey has focused specifically on Covid-19's impact on employees' workday eating habits, especially while they were working from home during the first lockdowns between March and September 2020. It has also analyzed the measures taken by restaurant owners to cope with the crisis, while responding as best they can to their customers' changing expectations.

In addition, the survey was extended to additional European countries (Bulgaria, Finland, Greece, Hungary and Poland are now included alongside Austria, Belgium, France, Italy, Romania, Slovakia, Spain, and Sweden) and also, for the first time, to Latin America (Argentina, Brazil, Chile, Colombia, Mexico and Peru) and Asia (Taiwan).

All in all, more than 40,000 employees and 2,300 restaurant owners in 20 countries were surveyed by Edenred and its partners for the 2020 Edenred FOOD survey.

High digital uptake among employees and restaurant owners alike

The latest digital sales channels have given employees a way to continue getting food from their favorite restaurants during lockdown. Of the employees interviewed for the 2020 Edenred FOOD survey, 72% report that they had ordered from a restaurant using delivery, take-out or click-and-collect services during the period. And 87% say they want their favorite restaurants to continue operating a delivery or take-out order service once the pandemic is over.

In all, 60% of restaurant owners interviewed say they managed to keep their business running to at least some extent during lockdown by setting up delivery or take-out services. A further 34% of them already operated this type of service. Nonetheless, 24% of the restaurant owners surveyed report they had been forced to shut down their operations temporarily during the crisis.

A balanced diet remains a top priority for employees, whether they are working on-site or from home

Employees' greater awareness of the importance of healthy eating, an issue evident in previous FOOD surveys, was even more prominent in 2020 despite the situation. Of the

employees interviewed, 79% claim to be more careful now about what they eat because of the crisis.

While 55% of employees surveyed say that they have not changed their eating habits in spite of the crisis, 33% indicate they have decided to eat a more balanced diet as a result of the situation. Conversely, 12% of respondents report that their diet had deteriorated (eating more, less balanced dishes), a development backed up by the drop in fruit and vegetable sales in certain countries, such as Belgium.

These trends are likely to prompt restaurant owners to make menu changes as 80% of employees interviewed express the hope restaurants will devise more balanced menus in the future. Meanwhile, restaurant owners also indicate their growing interest in practical advice on how to serve more balanced meals.

Meal vouchers—a ticket to a more affordable, straightforward and balanced lunchbreak

The employees surveyed who receive them report that meal vouchers are a big help when it comes to covering their lunchbreak spending. Their purchasing power would be hit without meal vouchers, according to 65%.

Digital meal vouchers, a solution that more than 8 out of 10 employees are happy with, have proven especially well-suited to lockdowns and contemporary consumer habits since users can access meal delivery and take-out services and pay contactlessly, which helps to reduce contamination risks.

In today's challenging times, meal vouchers are also regarded by 76% of the restaurant owners interviewed as having had a positive impact on their business, and by half of them as a means of retaining customers.

Trends specific to France

The pandemic seems to have had a modest impact on people's lunchbreak eating habits in France, with close to two in every three respondents in France stating that Covid-19 has not affected their diet. That said, 29% of them claim to have begun to eat more healthily, and just 7% report their eating habits having worsened because of the situation (vs. average of 10% across Europe).

France is one of the countries in which expectations as regards healthy eating options are the highest. In all, 79% of employees in France say they want restaurants to serve more balanced meals (vs. average of 70% in Europe). Healthy meals should not be any less flavorsome since 67% of the French restaurant owners surveyed believe that healthy dishes taste just as good as their less balanced equivalents.

Most French restaurant owners were able to adapt and stay open during lockdown: 44% of them launched a take-out or delivery service during the pandemic, and 21% already operated this type of service previously.

Edenred is a leading digital platform for services and payments and the everyday companion for people at work, connecting over 50 million users and 2 million partner merchants in 46 countries via more than 850,000 corporate clients.

Edenred offers specific-purpose payment solutions for food (such as meal benefits), mobility (such as multi-energy, maintenance, toll, parking and commuter solutions), incentives (such as gift cards, employee engagement platforms) and corporate payments (such as virtual cards). These solutions enhance user's well-being and purchasing power, improve companies' attractiveness and efficiency, and vitalize the employment market and the local economy. They also foster access to healthier food, more environmentally friendly products and softer mobility.

Edenred's 10,000 employees are committed to making the world of work a connected ecosystem that is safer, more efficient and more user-friendly every day.

In 2020, thanks to its global technology assets, the Group managed close to €30 billion in business volume, primarily carried out via mobile applications, online platforms and cards.

Edenred is listed on the Euronext Paris stock exchange and included in the following indices: CAC Next 20, FTSE4Good and MSCI Europe.

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