

THE TOP FIVE DINING TRENDS IN SENIOR HOUSING



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Dining in senior living isn't just about food anymore. Through the rise of "foodie" culture and a shift in the population toward senior living residents who are much choosier than in previous generations, communities are being challenged to do more and more in the way of dining.

The top providers are setting themselves apart through their approaches, and they are turning a creative eye to menus, nutrition, presentation, marketing and more.



PHOTO BY JAMES KRUML



Food: It's time for a radical rethink



Navigator Group Purchasing, Inc. is sharing this white paper on dining trends with you because we believe and want to illustrate that food is more than just a line item in your overhead. Food can be a true differentiator for your senior living facility—a core, and highly engaging part of your strategy—to attract and retain residents, keep occupancy rates healthy, and even to drive expansion.

Why do we believe food can be a differentiator, and not just a line item? Food is emotional. For many residents, their dining options are some of the few choices they will make on their own on a daily basis. And for families of residents, knowing that their loved ones are being served quality products makes them feel better about the facilities their loved ones reside in.

We already see that increasingly, our Members look to use their menus to differentiate themselves from the competition. The senior living space is expanding for sure, but competition is fierce. Good tasting food today has to be a given. Our residents' families, who have tremendous influence over where their loved ones reside, are looking for food attributes such as local, natural and sustainable that match the wants and needs of today's generation. Knowing and leveraging dining trends in an effective and efficient manner can be a key way to engage your market and build preference and loyalty.

How does Navigator's program support the notion of food as a differentiator?

Realizing how approaching food as a key differentiator can help our Members optimize their competitive edge,

we proactively work with our Members to educate them on the options that best meet their individual facilities' goals. To be sure, the answer is not one-size-fits-all, and the Navigator program has numerous options that meet a wide spectrum of needs within the senior living space.

We certainly realize that cost is important—but it shouldn't be the only focus. Our focus is on total program value; which entails cost, nutrition, quality, yield and variety, to name a few traits.

With Navigator as your group purchasing partner, you are in a prime position to effectively and efficiently leverage food as a core differentiator to enable success and support business growth.

In this white paper, we are bringing you the latest research in senior living dining from independent organization Senior Housing News [see survey methodology, page 9]. Through this research, we've identified the top trends in dining to help you envision what your dining program can do to help your organization stand out from the competition.

We hope you enjoy it.

—**Michael Dragone**

Vice President, Strategic Accounts
Navigator Group Purchasing, Inc.
1(800) 642-3020
www.NavigatorGPO.com



THE TOP FIVE DINING TRENDS

1 RESTAURANT-STYLE DINING

Restaurant-style dining is not a brand new trend in senior living, but it's an evolving one. As residents become more discerning about food options, they are demanding quality food and a restaurant-style approach to their daily meals: breakfast, lunch, dinner and snacks in between.

The restaurant approach also spans staffing, from food preparation to service and management.

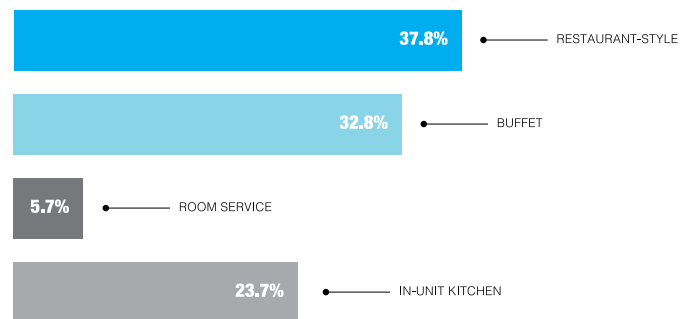
Some city-based communities are beginning to pride themselves on competing with dozens of local restaurants that are just steps from their front doors. Their dining programs must appeal the same way restaurants do because of the dense population and high concentration of outside dining venues in the area.

Clientele are well-traveled, well-educated and are opinionated when it comes to dining, food service professionals report.

Their challenge is having a captive audience, but they also are using that challenge as an opportunity to change the menu daily, keep residents engaged with varying options, and keep staff engaged by offering different choices each day. Many of the staff, who come from the restaurant business, appreciate the ability to change what they are doing on a day to day basis.

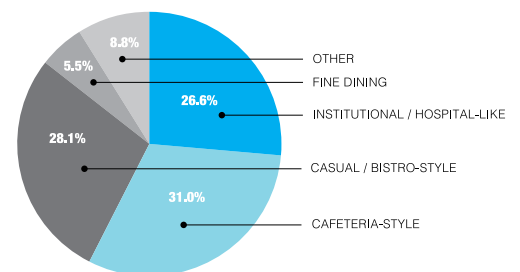
Restaurant-style dining also means restaurant-style equipment. Today's communities are taking cues from restaurants by incorporating meat grinders, pastry tools and rotisseries, to name a few, so that they can prepare menu items from scratch.

Which type of dining option in a senior living community is most important to you?



Source: SHN Consumer Dining Survey

How do you perceive the food in a typical senior living community?



Source: SHN Consumer Dining Survey



TODAY'S SENIOR LIVING PROVIDERS ARE UPPING THEIR EQUIPMENT GAME

PIZZA OVENS	PASTRY EQUIPMENT & STORAGE	CHAR BROILERS
ROTISSERIES	RESTAURANT-STYLE RANGES	RAPID-COOK OVENS
GELATO-MAKING MACHINERY	EXHIBITION KITCHENS	COMBINATION OVENS
	MEAT GRINDERS	

Kitchen layouts also accommodate this trend, as cook lines are getting longer and equipment is becoming more sophisticated. All of the changes are offering more flexibility to communities in offering choice to their residents and families.

2 SUSTAINABLE, HEALTH CONSCIOUS APPROACHES

Along with a national trend toward “going local” for food sourcing, senior living operators are implementing new food sourcing methods into their communities. For some, that means actually growing produce on site. For many others, it means taking a close look at where product is sourced, how far it traveled, and whether it’s in season.

A hyperlocal approach: The on-site garden

Many providers today are growing their own herbs and vegetables on site. In locales like Southern California, seasonal herbs and greens such as lettuces, rosemary and peppers are commonly grown in gardens on the premises.

But even in urban settings, communities are using the space they have to source their own ingredients with rooftop gardens. Not only do they allow operators to source ingredients themselves, but they also offer an opportunity for residents to get involved with the planting, care and harvesting.



PHOTO BY TANIA TULUIE

Growing local: Farm and purveyor partnerships

Senior living communities are also utilizing partnerships toward this sustainability charge. Partnerships with farms or local producers are becoming more common, including items like locally roasted coffee that can then be branded with the community's name.

Staff are routinely asked by residents where their vegetables are grown, how the dinner was made, and what went into the process. Farm partnerships create another talking point about the food in addition to the local direction they provide.

Even for national providers, where some menus are driven at the community level, raw ingredients, while they may be sourced through group purchasing organizations, such as Navigator, are done so with an eye toward sustainability and seasonality. National organizations can still access organic produce when it is in season through their supply chain in many cases.

These partnerships also allow smaller organizations to thrive. Though they may not operate at a level of scale to withstand interruptions in the food supply chain, such as the one realized in recent years by foodservice providers resulting from an avian flu that depleted much of the nation's chicken—and egg—population, smaller providers can achieve this scale by joining group purchasing organizations (GPOs) like Navigator that contract with the manufacturers on behalf of their partners.



PHOTO BY JAMES KRUML

3 DINING FOR ALL CARE TYPES

Inventive dining approaches are not just for independent living residents. Many concepts carry on throughout the entire care continuum. In fact, some programs are geared specifically toward high-acuity populations such as memory care residents.

One such program saw a need for a specialized approach to dining for memory care residents in senior living. By no fault of the staff or suppliers, many memory care residents have historically existed on finger foods like chicken fingers, peanut butter and jelly, and applesauce, and often food that is not able to be served hot.

The program works to restructure traditional meals without pureeing the food. Instead, it grinds some of the ingredients and reshapes them so that they can be eaten without utensils, allowing residents to taste and smell the same food they are familiar with, without the challenges around eating it in its traditional form.

4 VARIETY / 24-HOUR DINING

In addition to wanting to choose what they eat, senior living prospective residents expect to choose when they eat.

Some providers today are offering 24-hour food service options, such as grab-and-go choices, food or snack carts that are accessible any time, and venues that remain open late into the evening and open early in the morning. But many are still behind the curve.

Among operator professionals polled by Senior Housing News, the vast majority of communities do not offer dining options 24 hours a day.

Operationally, staffing and maintaining inventory and food service prep all day and all night is a challenge. But providers are finding a few ways to stretch dining hours to give residents more options.

Food/snack carts

A cart stocked with snacks such as granola bars and crackers is accessible to residents at any hour.

Convertible spaces

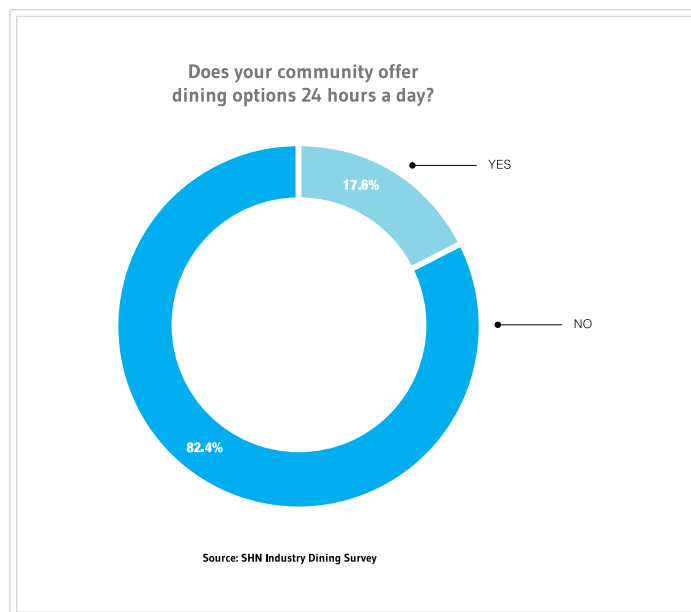
Venues serve as a coffee shop during the morning and a bar or pub during the evening. Shared staff and space helps keep costs down.

Grab-and-go

An increasing presence of grab-and-go items allows residents to bring a meal to his or her unit, or for those with in-unit kitchens, they can heat or prepare grab-and-go meals at any time.



PHOTO BY TANIA TULUIE



5 FOOD AS ENTERTAINMENT

With the rise of entire TV networks devoted to food, it is no surprise food is an ongoing source of entertainment and programming in senior living.

Providers center activities and programming around food heavily, with more than half reporting they provide this programming once a week or more frequently.

This programming ranges widely across the spectrum of providers and care types. Many providers are using creative ways to bring this programming into their communities for the enjoyment of residents.

Pop-up dining venues

Providers are bringing the food preparation outside, or to the cafe area, and they are making food interactive, such as a carved sandwich bar set in an outside garden or patio where residents can assemble their own sandwiches with house-made dressings and Sauces.

Cooking demonstrations

Whether a true lesson with hands-on resident participation or a cooking demonstration by an in-house or visiting chef, providers are preparing food in front of residents for their entertainment and education.

Exhibition kitchens

Popular among mainstream restaurants, exhibition kitchens are still a luxury in senior living, but they are becoming more commonplace. Here, chefs have all the tools they need to prepare an entire meal in front of residents.

Chef competitions

“Top Chef”-style competitions, aired nationwide through distribution channels such as live-streaming, in which chefs compete on a challenging cooking task. Communities root for their chef representatives during the competition.

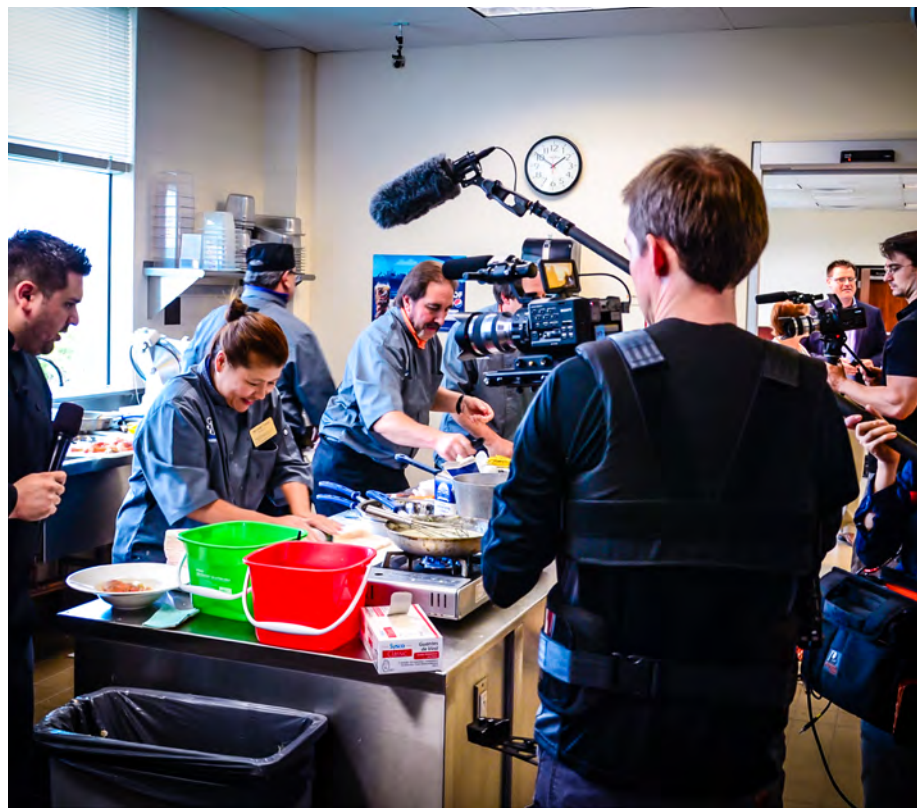
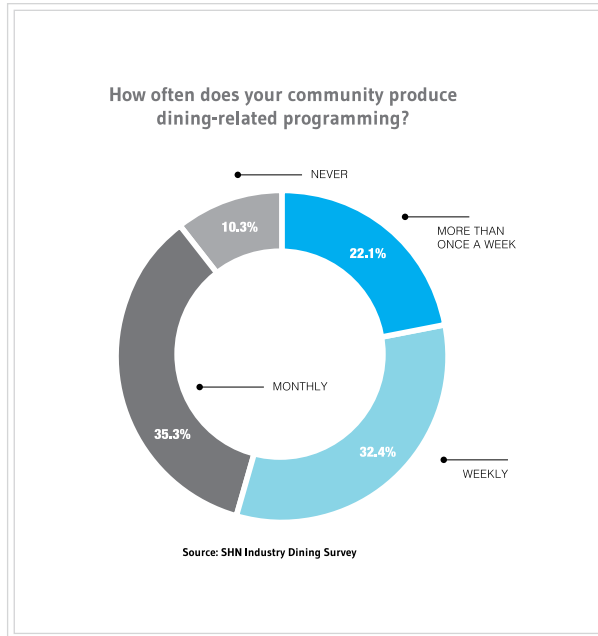


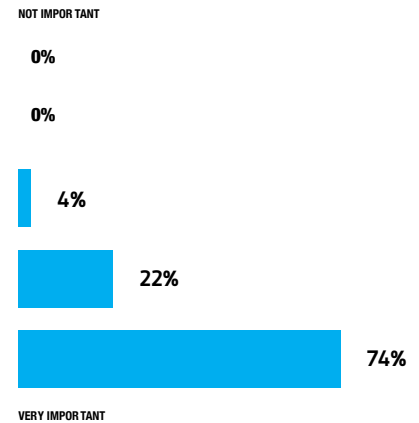
PHOTO BY TANIA TULUIE

DO MORE WITH DINING

Your community may not need to implement every trend, but there are some simple ways to bring dining to a higher level and use your dining as a marketing tool:

- **Encourage community participation.** Launch cooking demonstrations, do taste-tests, teach a cooking skill.
- **Create community-branded products.** Make your own sauces and label them with your community branding.
- **Host events.** Treat your operations like a catering company to invite residents to host events on-site.
- **Attend events.** Go to your local “taste of” event and sample your scratch creations.
- **Grow a garden.** Allow residents to harvest the herbs and vegetables that will be served during meal time.
- **Host a celebrity chef.** Host a chef or partner with one who can provide new perspective on your dining operations.

How do you rank dining in terms of its level of importance in marketing your senior living community?



Source: SHN Industry Dining Survey

IN CLOSING

To support business growth and stay competitive, Navigator believes that senior living providers need to evolve along with the changing dining landscape and adapt to the expectations of residents and their families.

We believe food can be much more than a line item in your overhead: food can be a core differentiator and a core part of your strategy to attract and retain residents, keep occupancy rates healthy, and even to drive expansion.

To find out more about how Navigator can support you, simply call 800-642-3020, or visit www.NavigatorGPO.com

ABOUT SENIOR HOUSING NEWS

Senior Housing News (SHN) is the leading independent source of news and information covering the senior housing industry.

With a national reach of more than 30,000 professionals, SHN readership includes senior housing operators, developers, banking institutions, real estate investment trusts, private equity and service providers catering to the industry.

SURVEY METHODOLOGY

SHN conducted its Consumer Dining Survey online using Google Consumer Surveys on June 2, 2015. The general population was filtered to include 262 respondents who were at least 65 years old in the United States and on the Google Consumer Surveys publisher network.

SHN conducted its Industry Dining Survey online among Senior Housing News readers using Survey Monkey between June 2, 2015 and June 26, 2015. Among 88 respondents, all indicated they work for a senior living operator.





Navigator Group Purchasing, Inc., a subsidiary of Managed Health Care Associates, Inc., is the experienced leader in health care purchasing services for the senior care market. Navigator delivers savings and cash flow improvements through a value-driven portfolio of food, medical and business programs. The Navigator approach gives senior care living providers a unique Membership experience based on four key benefits to Members: flexibility with our distributor neutrality model, substantial savings opportunities through formulary management and development, unparalleled transparency through reporting of off-invoice pricing and rebate information provided at the SKU level, and data-driven insights to help make optimal purchasing decisions.

