

P66 Billings Refinery Survey Insights Summary Report

Feb 14, 2022



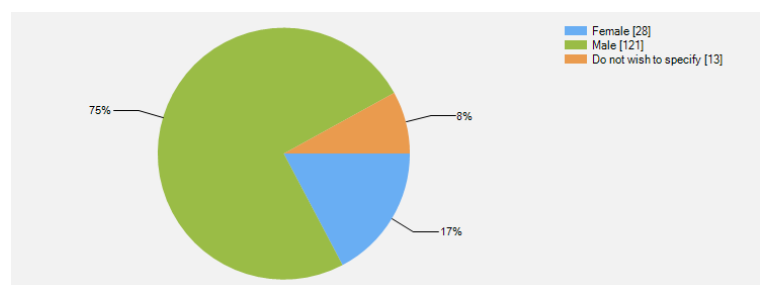
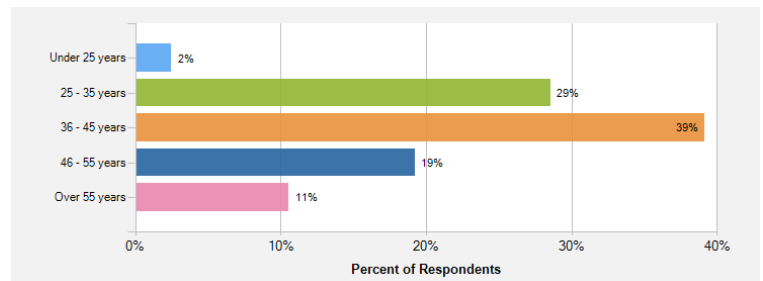
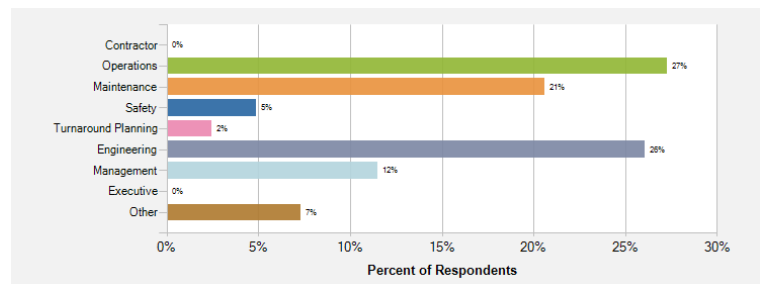
Overview

The objective of this survey was to determine the optimal food service and retail solutions for a turnaround at the Phillips66 Refinery in Billings, Montana. The turnaround is scheduled from the beginning of April 2022 until the end of May 2022. Sodexo is engaged as the food and retail service provider. Sodexo Energy & Resources, in partnership with Phillips66, surveyed 165 company employees via email from January 24, 2022 - February 11, 2022.

Key Insights

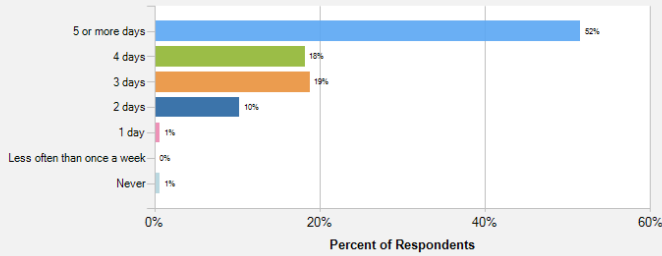
- 89% percent of employees said they would make use of the turnaround catering provided on site 3 or more days of the week.
- The top 4 cuisines selected by the respondents include: American Grill fare, Sandwiches & wraps, Mexican, Italian (Pasta & Pizza)
- The top 5 retail snacks include: Jerky, Fresh whole fruit, Nuts & seeds, Energy & protein bars, Chips
- Regular brewed coffee, hot lattes, and iced tea were selected as the top 3 beverage preferences.

Demographic

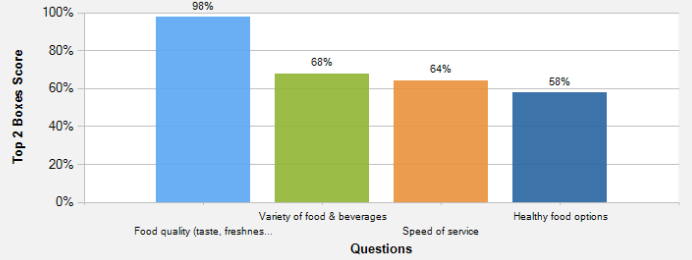


Food Service

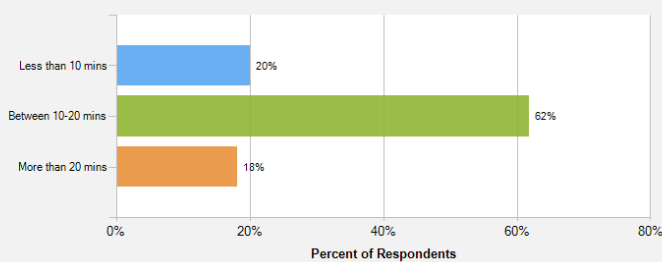
Of the respondents surveyed, 98% of them work on-site 3-4 days or more. During the turnaround, **89% percent said they would make use of the catering provided on site 3 or more days of the week.**



Of the respondents surveyed, 98% of them indicated that food quality (taste, freshness and temperature) was important or very important, **while 58% indicated that healthy options were important or very important.**

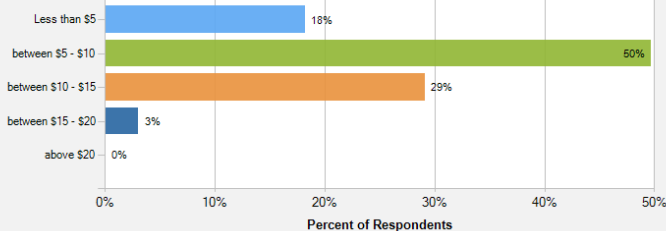
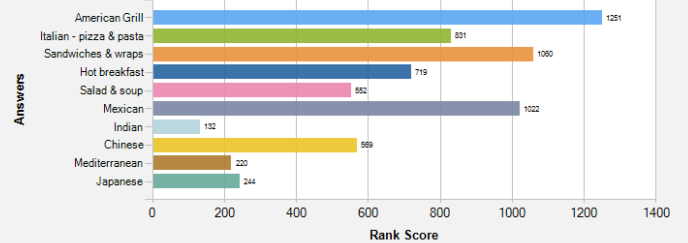


During a turnaround, **82% of respondents said they would have less than 20 mins to select and enjoy a meal. 79% would pay \$5-\$15 for a meal at work. 96% would bring a meal from home if not opting for the on-site food service.**

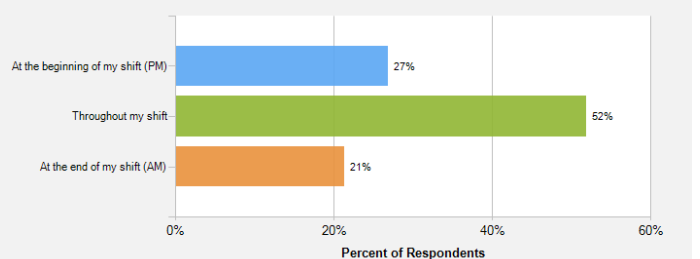
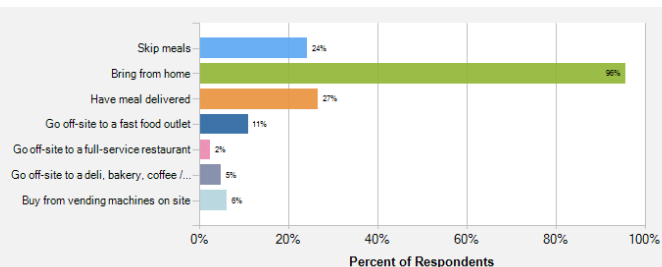


The **top 4** cuisines selected by the respondents include:

1. **American Grill fare**
2. **Sandwiches & wraps**
3. **Mexican**
4. **Italian (Pasta & Pizza)**



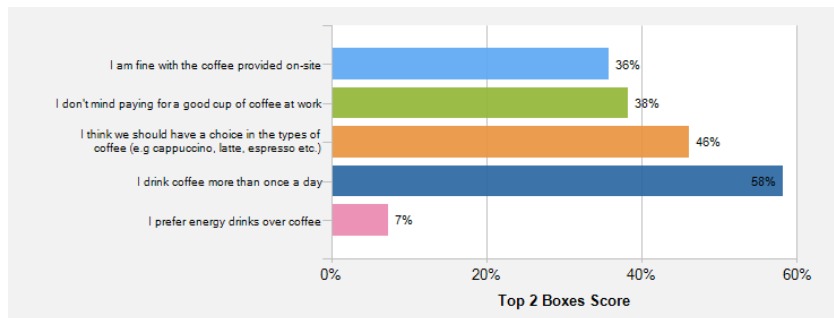
52% of respondents who identify as working the night shift during a turnaround indicated that they **would prefer to have hot breakfast options available throughout their shift.**



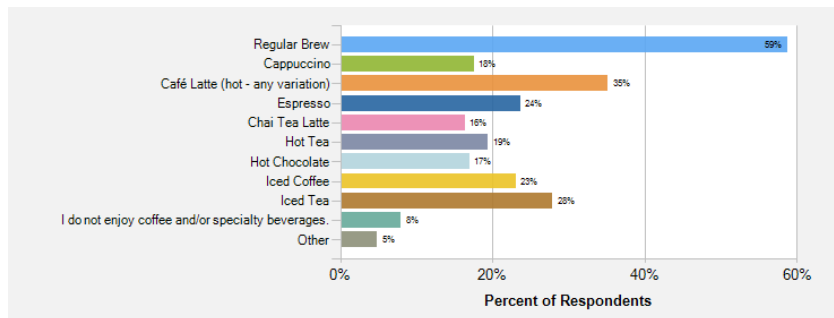
Retail & Coffee

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
I am fine with the coffee provided on-site	21%	14%	29%	24%	12%
I don't mind paying for a good cup of coffee at work	17%	15%	30%	27%	12%
I think we should have a choice in the types of coffee (e.g cappuccino, latte, espresso etc.)	8%	11%	35%	28%	18%
I drink coffee more than once a day	15%	8%	19%	30%	28%
I prefer energy drinks over coffee	50%	18%	24%	4%	4%

Agree or Strongly Agree

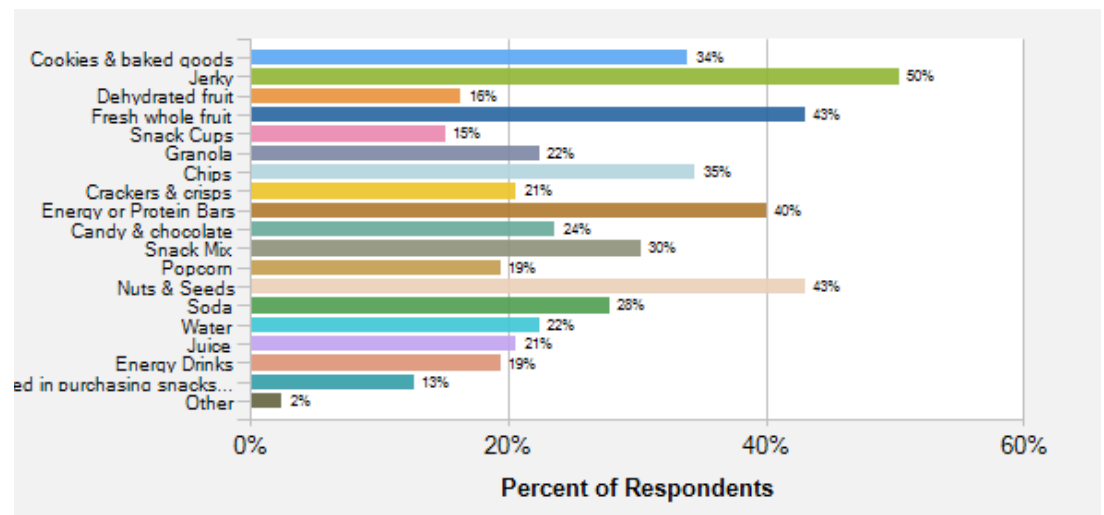


Beverage Preference Ranking



- **58% of respondents drink more than 1 cup of coffee per day.**
- 35% of respondents indicated that they are not satisfied with the coffee provided on site vs. 36% who are satisfied.
- 39% do not mind paying for a good cup of coffee at work vs. 32% who would not pay.
- **46% believe there should be a wider variety in choice of types of coffee (cappuccino, latte, espresso) vs. 17% who do not agree.**
- Only 8% prefer energy drinks over coffee.
- **Regular brewed coffee, hot lattes, and iced tea were selected as the top 3 beverage preferences.**

Top Retail Snack & Beverage Preferences



The top 5 retail snacks include:

1. Jerky
2. Fresh whole fruit
3. Nuts & seeds
4. Energy & protein bars
5. Chips

Soda was selected as the **top retail beverage.**

General Services Insights

When working at the refinery, how important are the following for you?

	Not at all important	Slightly important	Moderately important	Important	Very Important
I need a well-designed workspace to do my work productively	4%	8%	16%	47%	25%
I need an area that is suitable for business meetings	18%	13%	26%	30%	13%
I need a place to eat my lunch	13%	17%	26%	25%	19%
I need to be able to relax or take a break	13%	14%	21%	30%	21%

Moderately Important, Important or Very Important

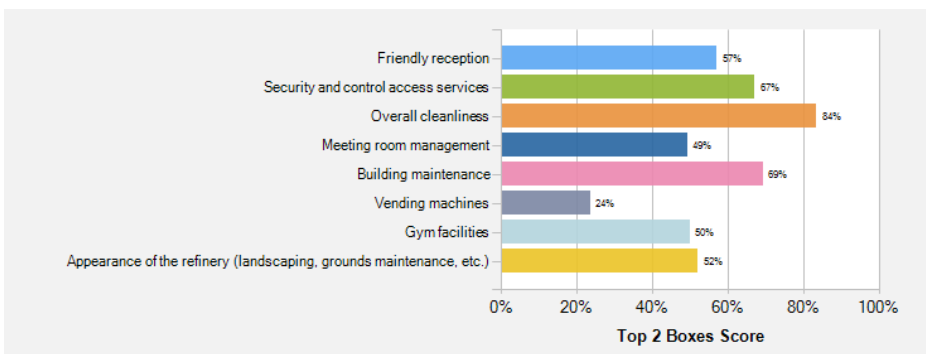


- 88% of respondents believe having a well-designed workspace is important for their productivity.
- 70% need an area that is suitable for business meetings.
- 72% need to be able to relax and take a break.
- 70% need a place to eat their lunch.

In your opinion, how important are the following at your workplace?

	Not at all important	Slightly important	Moderately important	Important	Very Important
Friendly reception	11%	9%	22%	44%	14%
Security and control access services	6%	4%	22%	43%	24%
Overall cleanliness	1%	2%	14%	42%	41%
Meeting room management	11%	9%	30%	39%	10%
Building maintenance	4%	5%	22%	50%	19%
Vending machines	21%	29%	26%	19%	5%
Gym facilities	11%	19%	20%	31%	19%
Appearance of the refinery (landscaping, grounds maintenance, etc.)	10%	12%	26%	36%	16%

Important or Very Important



- 84% of respondents believe the cleanliness of the refinery is very important or very important.
- 69% believe the overall building maintenance is important or very important.
- 67% believe security and access controls are important or very important.

General Services Insights

When asked what could improve their everyday experience when working at the refinery, **78% of respondents indicated that food services, specifically a food truck, would make their experience better.** 48% of respondents indicated coffee and other break items would also make their experience better.

