

OUT-OF-HOME EATING HABITS – GERMANY – 2020

German foodservice brands can mitigate the damage caused by COVID-19 by ramping up takeaway options and delivery services.



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Report Content

EXECUTIVE SUMMARY

Note on COVID-19

- COVID-19's impact on foodservice and German consumer behaviour
- Mintel's perspective

Market context

- COVID-19 hits foodservice hard
- An ageing population will require a shift in focus
- Environmental concerns top of mind
- Germans' love of cooking hampers industry growth

Mintel predicts

- Sales expected to be cut in half in 2020
- The impact of COVID-19 on foodservice

What consumers want and why

- Consumers want: convenience
 - Graph 1: meals eaten at a restaurant or food outlet for an everyday occasion in the last three months, January 2020
- Consumers want: convenience
- Consumers want: to experiment
 - Graph 2: restaurants/food outlets visited, January 2020
- Consumers want: to experiment
- Consumers want: high-quality food and value for money
 - Graph 3: factors for choosing a restaurant or another food outlet for a leisure/an everyday occasion, January 2020
- Consumers want: transparency and ethical dining choices
 - Graph 4: attitudes towards eating out, January 2020
- Consumers want: transparency and ethical dining choices

Opportunities

- Scope to build innovation around young consumers of the future
- Show greater holistic concern for the environment
- Diversify takeaway options
- Meet consumers halfway
- Quick download resources

THE IMPACT OF COVID-19

- COVID-19's impact on the broader category
- Market size & forecast following COVID-19 outbreak
- What COVID-19 will mean in the short, medium and long term for foodservice
- Key shifts in consumer behaviours
- How COVID-19 is impacting key consumer segments
- COVID-19 threatens foodservice industry...
- ...and fundamentally changes the dining experience
- Capitalise on deliveries and digital payment options
- The impact of COVID-19 on the marketing mix
- How a COVID-19 recession will reshape the industry

MARKET DRIVERS

- Worry about being exposed to COVID-19 has grown
 - Graph 5: how worried are you about the risk of being exposed to the coronavirus (also known as COVID-19), March-April 2020
- Concerns about COVID's impact on Germans' lifestyles skyrocket
 - Graph 6: extent to which people are worried the outbreak might affect their lifestyle, March-April 2020
- COVID-19's impact on the foodservice industry
- Eating out is dependent on financial health
 - Graph 7: meals eaten in a restaurant or food outlet in the last three months by financial health, January 2020
- Demographic reality takes shape
 - Graph 8: share of maximum adult population projections, by age group, 2020-30
- Catering to the ageing population
- Germans' love of cooking
 - Graph 9: household spending in restaurants and hotels per month, 1998-2018
- Germans' love of cooking
- Shortage of labour a main challenge of the industry
- Cutting food waste top concern
- Cutting food waste is a top concern
- Legal push for reducing packaging waste
- Zero waste gains momentum

WHAT CONSUMERS WANT AND WHY

Eating out participation

- Eating out participation is high
- One in three Germans eat lunch and dinner out of home for an everyday occasion
 - Graph 10: meals eaten at a restaurant or food outlet for an everyday occasion in the last three months, January 2020
- One in three Germans eat lunch and dinner out of home for an everyday occasion
- Opportunity to convert packed lunchers
 - Graph 11: frequency of bringing own lunch to work/college from home, January 2020
- Opportunity to convert packed lunchers
- Going out for food for an everyday occasion decreases with age
 - Graph 12: meals eaten at a restaurant or food outlet for an everyday occasion in the last three months, January 2020
- Going out for food for an everyday occasion decreases with age
- Dinner most popular meal for leisure occasions
- Lunch particularly popular among young consumers
 - Graph 13: meals eaten at a restaurant or food outlet for a leisure occasion in the last three months by age, January 2020
- Lunch popular among young consumers

Eating out frequency

- Only one in four Germans eats out on a weekly basis
- Men eat out more often than women
- Dads twice as likely as mums to eat out weekly
 - Graph 14: frequency of eating out in a restaurant or food outlet in the last three months, by gender and parental status, January 2020
- Younger consumers boost eating out frequency
 - Graph 15: frequency of eating at restaurants or other food outlets, by age – NET, January 2020
- Younger consumers boost eating out frequency

Restaurants/food outlets visited

- Two in five Germans eat German and Italian food
 - Graph 16: restaurants/food outlets eaten at in the last three months, January 2020
- Only a third of Germans visited four or more restaurant types
 - Graph 17: repertoire of types of restaurants visited, January 2020
- Young consumers are more adventurous in their food choice
 - Graph 18: restaurants/food outlets visited, January 2020
- Young consumers are more adventurous in their food choice
- Older consumers favour German food
- Fast food enjoys a mass appeal

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- Coffee shops popular among young and old

Important factors when choosing a restaurant

- Price and quality important for everyday occasions
 - Graph 19: factors for choosing a restaurant or another food outlet for an everyday occasion, January 2020
- Eating out for leisure largely driven by quality of food
 - Graph 20: factors for choosing a restaurant or another food outlet for a leisure occasion, January 2020
- Atmosphere as the sweet spot to maximise reach for a leisure visit

Attitudes towards eating out

- Diners want more transparency...
 - Graph 21: attitudes towards eating out, January 2020
- Diners want more transparency...
- ...and are willing to pay a premium for ethical foods
- Helping consumers in guiding their choice
- Ethical and healthy eating go hand in hand
 - Graph 22: attitudes towards eating out, by important factors when choosing which restaurant to visit for a leisure occasion, January 2020
- Ethical and healthy eating go hand in hand
- Recommendations from family and friends are important
- Young consumers are obsessed with food and seek extra convenience
 - Graph 23: attitudes towards eating out, by age, January 2020

LAUNCH ACTIVITY AND INNOVATION

Sustainability top of mind

- Coffee shop sector at the forefront of sustainability
- Coffee shop sector at the forefront of reusable cups
- Coffee Fellows produces own compostable coffee cup
- McDonald's pilots 'Better M store' in Berlin in June 2019
- Plastic straws under high scrutiny
- 'Too Good To Go' to fight food waste
- Too Good To Go to fight food waste

The integration of technology in the foodservice industry

- Online software and chatbots to speed up reservation process
- Burger King installs self-ordering terminals
- New order system at Vapiano speaks to convenience
- Cashless payments gain momentum

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- Examples of cashless restaurants
- Dark kitchens still niche

On-the-go consumption

- High-quality on-the-go consumption for drivers
- Turkish 'on-the-go' consumption for flight passengers
- Bakeries going green

Advertising and marketing activity

- McDonald's speaks to busy consumers
- Coffee Fellows target coffee lovers....
- ...and bagel eaters
- NORDSEE's fight against food waste

MARKET SEGMENTATION, SIZE AND FORECAST

Forecasting during the COVID-19 pandemic

- Note on forecast in response to COVID-19
- Eating out market grew again in 2019
- Fast food and takeaway experienced strongest growth
- Sales expected to be cut in half in 2020
- Short-term decline
- Medium-term recovery
- Long-term growth

APPENDIX

Appendix – products covered, abbreviations and consumer research methodology

- Products covered in this Report
- Abbreviations
- A note on language usage
- Consumer research methodology

Appendix – market size and forecast

- Market size and forecast – value

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