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
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- Consumers want: to experiment
  - 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

Opportunities

- Scope to build innovation around young consumers of the future
- Diversify takeaway options

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
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- Shortage of labour a main challenge of the industry
- Cutting food waste top concern
- Cutting food waste is a top concern
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- Zero waste gains momentum

WHAT CONSUMERS WANT AND WHY

Eating out participation

- Eating out participation is high
- Graph 10: meals eaten at a restaurant or food outlet for an everyday occasion in the last three months, January 2020

- Opportunity to convert packed lunchers
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- Lunch particularly popular among young consumers
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- Lunch popular among young consumers

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- Men eat out more often than women

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- Fast food enjoys a mass appeal
- Coffee shops popular among young and old

Important factors when choosing a restaurant

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- Diners want more transparency…

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- …and are willing to pay a premium for ethical foods
- Helping consumers in guiding their choice
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- Coffee shop sector at the forefront of sustainability
- Coffee shop sector at the forefront of reusable cups
- 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
- New order system at Vapiano speaks to convenience
- Cashless payments gain momentum
- Examples of cashless restaurants
- Dark kitchens still niche

On-the-go consumption

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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