



Convenience in Europe

On-The-Go Consumption – Products, Channels, and How They Are Perceived

The second study from the Competence Center for
Convenience at the European Business School (2009)

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It Cannot be Ignored: On-The-Go Consumption as an Integral Part of Daily Life

Male, mid-thirties, single, and a city dweller: this is what is commonly thought of as the target group of on-the-go consumption, and was the starting point of the first Convenience Study in 2008. The chief result: convenience has many faces. The present study now aims to show how strongly on-the-go consumption is dependent on circumstances.

Convenience Suppliers as a Reliable Partner for a Flexible Life

Readers' great interest in the 2008 Convenience Study showed us the importance of understanding on-the-go consumption, an area which has previously been the object of little attention in research, despite its increasing importance amongst consumers. Suppliers of convenience products are reliable partners for consumers, as they allow them to organise their lives flexibly with regards to the consumption of food and drink. The rising demand for on-the-go consumption also offers new opportunities for operators of relevant establishments. They can optimise their assortment and thus expand their businesses. The Lekkerland Endowed Chair for Convenience & Marketing at the European Business School (EBS) facilitates a concentrated examination of these contexts.

Flexibility and Joy are Motives for On-The-Go Consumption

Who eats and drinks on the go? This was one of the questions the 2008 Convenience Study investigated. It provided evidence that on-the-go consumption must be viewed in a differentiated way and has more than just the one target group. In addition, motivation plays a role. The main driver for the inclination for on-the-go consumption is the joy obtained from it. Furthermore, the consumer values the perceived flexibility of on-the-go consumption. Other motives have pragmatic origins, for example time pressure or irregular daily routines. The countries selected for study in 2008

represent convenience segments at different stages of development. As the headquarters of Lekkerland, Germany was and remains the main focus of study in the analysis of people who eat and drink on the go. Germany's suppliers and consumers have a reputation for being somewhat hesitant to take up new trends. The Netherlands, as the second country in the study, is a highly developed market as regards suppliers. The situation is different in the third country of study, Romania, where the market for on-the-go consumption is still at the development stage.

Suggestions Welcomed

The results of the study were presented at numerous events last year. As a result, we received valuable suggestions from the participants, which we were happy to take on board.

They concerned the fact that on-the-go consumption is highly dependent on circumstances. A further suggestion was the necessity of a separate consideration of food and drink in on-the-go consumption. In addition, the choice of channel was considered against the backdrop of life circumstance or the time of day in this year's study. The main result of this year's investigation: convenience does not only have many faces, it has many occasions too.

All in Good Time

The present results from the Convenience Study 2009 take the circumstantial motives in the inclination for on-the-go consumption during the day into consideration. For this reason, a distinction was made between working days and days off. In addition, consumers' varying behaviour during working hours in the morning, at lunchtime, and in the evening is examined. On the basis of the results, we have distinguished five different types, whose graphic and entertaining designations already provide an initial insight into their respective preferences.

On normal working days, we distinguish between the Early Eater, the Midday Muncher, and the Late Gourmet. For the Early Eater, breakfast in the morning is the most important time to eat and drink. The Midday Muncher prefers lunchtime to consume food and drinks, while the Late Gourmet favours the mealtime and warm or chilled drinks at the end of the day.

These strict demarcations frequently become blurred in leisure time. Nevertheless, on-the-go consumption types can also be distinguished here. On the one hand, there are the Purpose Eaters who particularly value satisfying their hunger, speed, and ease, on the other the Social Eaters who prefer sociable and pleasurable surroundings when eating and drinking on the go on their days off.

Supermarket, Discounter, Petrol Station: Every Channel has Something to Offer

Alongside these consumer types during working hours and in leisure time, the channels were examined more closely. The channel profiles offer information, for example, on which channels are preferred in which circumstances. In addition, who the customers of the channel are and whether they differ from those in other channels was investigated. The respective competitive advantages of the specific channels were derived from the question of how consumers evaluate the individual channels.

What Germans, Austrians, and the Swiss Have on their Plates

This year, alongside Germany as Lekkerland's headquarters, the neighbouring countries of Austria and the German-speaking part of Switzerland are the focus of the Convenience Study 2009. Even though these countries border one another, there are considerable variations in on-the-go consumption with regard to products or channels.

The goal of the "Convenience in Europe" study series is the acquisition of a more precise picture of on-the-go consumption in individual European countries. The Convenience Index serves this purpose with the results of the countries investigated to date. For a quick overview, I recommend the summary of the most important findings on the following page.

It remains for me to wish you a pleasant read of this year's study.



(Prof. Dr. Sabine Möller)

Holder of the Lekkerland Endowed Chair for Convenience & Marketing, Director of the Competence Center for Convenience at the European Business School (EBS).

Main Results: Unity and Diversity

Consumers: Unity and Diversity

- The importance of the various mealtimes differs to an extent in the three countries. This is of relevance to on-the-go consumption because important mealtimes are omitted more rarely and tend to be spent at home.
- Time pressure and social acceptance of on-the-go consumption amongst friends and acquaintances are the essential drivers of eating and drinking on the go in all three countries.
- Especially in Germany, but also in Switzerland, joy in eating and drinking on the go is a further important driver.
- Germany is the only country in which price sensitivity at least weakly inhibits on-the-go consumption.

Products: Top Sellers and Country Characteristics

- Chilled refreshing drinks and hot drinks are highly valued in all countries: a fondness for coffee is particularly strong in Germany, while the Swiss and Austrians have a penchant for energy drinks.
- Filled rolls, warm snacks, and sweets are particularly popular in all countries, the warm snack is predominantly in demand in Germany, while the Swiss and Austrians prefer something more healthy and fresh and consume fruit and salads.

Choice of Channel: Dependent on Circumstances

- Overall, supermarkets, specialty stores, discounters, snack stands, and petrol stations are visited the most frequently for on-the-go consumption.
- Comparatively many specialty stores and petrol stations are called on while on the way to work,
- whereas the snack stand, fast-food restaurant, and coffee shop are popular during working hours.
- On the way home, a quick stop is made at food retailers, the supermarket and discounter providing on-the-go consumption.
- People have more time on their days off and use channels where it is possible to spend a while on the go: restaurants, fast-food restaurants, and snack stands.

Strengths and Potential of the Channels

- The petrol station and the specialty store: particularly accessible, particularly quick, and particularly friendly. Both could improve in terms of affordability.
- The kiosk and snack stand are viewed similarly by customers, they are considered particularly quick and have a personal touch, but only a small selection.
- The strength of the self-service formats: accessibility, as well as the selection in the supermarket and the affordability at the discounter. Their weakness is their anonymity.
- Restaurants and coffee shops score points for their personal touch and are also considered particularly clean — presumably aided by the standards of international branch network suppliers.
- Fast-food restaurants are also clean, quick, and accessible, which is why they are particularly liked by the pragmatic Germans.

Each to His Own

The inclination for on-the-go consumption is dependent on the time of day and its routine. For this reason, the study differentiates between the Early Eater, the Midday Muncher, and the Late Gourmet on working days. The statement concerning which time during the day respondents consider eating most important is decisive. When people do not go to work, these time periodisations become blurred, which is why it makes sense to create different consumer types for leisure time. The Purpose Eater finds satisfying hunger, speed, and ease particularly important while on the go in leisure time, the Social Eater pleasure and sociability.

There is barely anything which determines eating and drinking behaviour as strongly as the time of day. For some consumers, the day cannot begin without breakfast at the home dinner table. Others, by contrast, enjoy buying something to eat and drink while on the go and are happy for every minute of extra sleep they gain through this. In turn, others regularly omit breakfast. This also depends on which other time of day is important for eating and drinking. For some, lunch may be dispensable or represent a tiresome activity in their day-to-day working lives. Others, however, view the lunch break as a valuable and communicative pause. The evening meal is occasion for similarly heterogeneous habits, ranging from dinner at a set time with the family to constantly changing times, places, company, and type of food.

On Early Eaters and Late Gourmets

Different lifestyles also affect the inclination for on-the-go consumption, which is highly dependent on circumstances. It therefore makes sense to consider consumer behaviour on days off and working days separately. Eating is not only heavily dependent on the time of day but also on preferences and habits. For some, breakfast before the working day starts is especially important. These are designated Early Eaters in the study. Consumers who particularly value food and drink at lunchtime on working days are so-called Midday Munchers. Analogously, most

important for the Late Gourmet is dinner and drinks after the working day. The perfect eating time has an effect on where they consume their desired products. Those for whom a specific period of time to enjoy food and drink is very important mainly consume the products at home.

Most important mealtimes on ...

working days	days off	
„The Early Eater“: breakfast is most important	„Purpose Eaters“: like it quick and easy	„Social Eaters“: like to enjoy with company
„The Midday Muncher“: lunch is most important		
„The Late Gourmet“: dinner is most important		

Pleasure at Lunchtime is the Key on Working Days

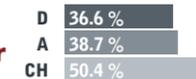
The significance of the various eating times for consumers is influenced by a range of aspects, including, for example, the preference for certain foods at specific times of the day. Biorhythms and sleep routines can also influence this significance. The order of priorities in a national culture also plays a role. The Germans and Austrians have relatively similar preferences. For them, lunch on working days is most important, closely followed by dinner. Breakfast is less important. This trend is even more pronounced amongst the Swiss, of whom only 14 percent are Early

Eaters. Almost twice as many people in Germany state that breakfast is most important to them. By contrast, the share of Midday Munchers in Switzerland is particularly high: almost half the number of respondents prefers the middle of the day for eating and drinking.

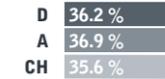
The Early Eater



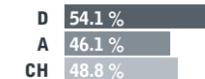
The Midday Muncher



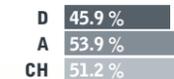
The Late Gourmet



The Purpose Eater



The Social Eater



Free and Easy Pleasure in Leisure Time

The significance of certain times for the choice of the home fridge or the product range while on the go depends on whether working days or days off are considered. Experience shows that the times in which food and drink are consumed during leisure time vary greatly. In leisure time, therefore, the types are not differentiated according to their preferred time of day but rather by their motives for consuming a ham sandwich, ice cream, or a milk-based drink. If the motives are sociability or pleasure, they are termed Social Eaters in the study, and if satisfying hunger, speed, or ease are most important, they are called Purpose Eaters. Cultural differences can also be ascertained here: the share of Purpose Eaters in Germany is particularly high, while the Social Eaters predominate in Austria. Important questions on both these leisure types are also answered: is it Purpose Eaters or Social Eaters who more often buy food and drink to go? And when they do eat and drink while on the move, are there differences in the products or the perception of the product range, and which channels are chosen?



Sacred Cow in the Morning: Breakfast is Indispensable for Early Eaters

Breakfast in the morning is indispensable for Early Eaters. But how strongly does this factor impact on consumer behaviour? Satisfying hunger, pleasure, and sociability in the morning are important to them, and this best at home. When consumers buy food and drink while on the go in the morning, they usually do this at the supermarket, the baker/butcher, the discounter, or the petrol station.

Breakfast is seen as the starting point of the day. There are, however, many people who leave home in the morning without having had breakfast – but not the Early Eaters, understood as consumers who attach the highest importance to breakfast on a typical working day. In this respect, the Germans and Austrians are very similar, with about a quarter of each population being Early Eaters. In Switzerland, the figure is considerably lower.

For 27% of Germans, 24% of Austrians, and 14% of the Swiss, breakfast is the most important mealtime in the day.

Irrespective of particular country-specific features, Early Eaters differ from Midday Munchers and Late Gourmets. It is initially striking that Early Eaters, on average, are older, tend to be married, and have children. The number of children in a household evidently increases the importance of breakfast and with it the probability of being an Early Eater. In addition, this time of day holds appeal as regards eating and drinking for two contrasting groups. Breakfast is highly valued amongst people who work at home, but consumers who are frequently on the go also enjoy pleasure in the

morning. Both groups can be better classified as Early Eaters than as Midday Munchers or Late Gourmets. However, being in a full-time or part-time job, in training, or retired gives no indication of which time is considered most important for food and drink.

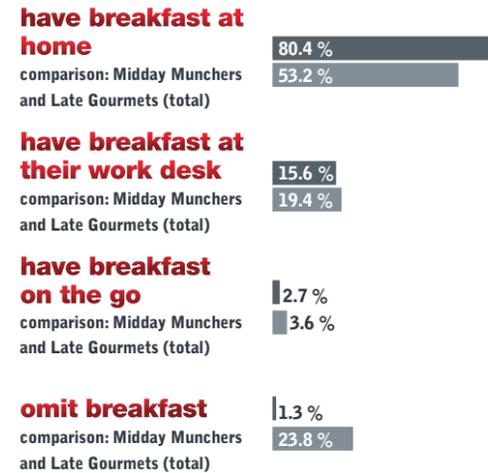
Important Mealtimes are not Omitted

A considerable share of Midday Munchers and Late Gourmets omit breakfast. Around a quarter of those who do not find breakfast particularly important evidently also consider it dispensable. This is not the case amongst Early Eaters: those who consider breakfast important do not go without it. Only a very small share – around one percent – of Early Eaters omit food and drink in the morning. This is, incidentally, not only true of breakfast. The later chapters show that food and drink times considered important by consumers are only omitted very rarely.

It's Best at Home

The table at home is generally the place most people have breakfast. However, there are differences amongst the individual types regarding how popular their own four walls are for the morning coffee or breakfast roll. Around 80 percent of Early Eaters prefer the kitchen table at home. By comparison, the figure amongst Midday Munchers and Late Gourmets is only 53 percent.

Early Eaters who, at least four times a week ...



Convenient Breakfast at Work — Hurried While On the Go

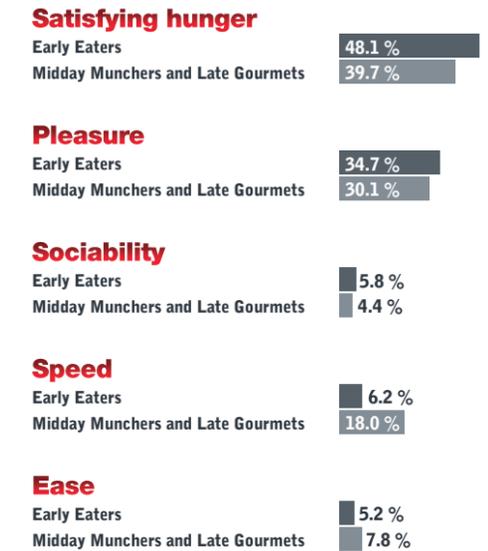
Whether breakfast is eaten at the work desk or on the go is not dependent on whether breakfast is important or not to consumers. Similar numbers of Early Eaters, Midday Munchers, and Late Gourmets decide to eat breakfast at their work desks (around 16 percent) or while on the go (around three percent). The reason is that consumers who eat or drink something in the morning at their desks value ease more highly. For those who eat breakfast on the go, speed is more important. Sociability is frequently what counts at the home breakfast table.

Filled Up for the Day: Stilling Hunger is a Factor in Breakfast

Almost half of all Early Eaters want breakfast in the morning to fill them up as their primary motivation. Pleasure is important in the morning for a further third. The tables are turned when the comparison group of Midday Munchers and Late Gourmets are considered, for whom breakfast is less important. Satisfying hunger and pleasure are the most important things in absolute terms for this group too, but speed is also a primary welcome factor. Amongst Midday Munchers and Late Gourmets, around three times as many people name speed as their main

motivation in comparison with Early Eaters. Up and off, the non-Early Eaters thus like a quick and easy breakfast.

Most important to me when eating in the morning is ...



Who Makes a Quick Stop on the Way to Work?

What influence do these morning preferences have on on-the-go consumption? Can suppliers only score points with speed and ease amongst those consumers for whom breakfast is not so important? Exactly right. Early Eaters have a lower tendency to eat and drink while on the go in their everyday routines. The situation is different amongst Midday Munchers and Late Gourmets, who tend to value speed and ease. Only around a third of Early Eaters buy something to eat or drink on the way to work once or more a week. At 44 percent, the figure for Midday Munchers and Late Gourmets is noticeably higher.



Germans On The Go in the Morning

The willingness to eat breakfast while on the go is highest in Germany. Around 44 percent use the possibilities of on-the-go consumption on the way to work at least once a week. One thing stands out: the share of those who perceive the possibilities of on-the-go consumption on the way to work at all may be highest in Germany, but the greatest frequency exists in Switzerland. The Swiss represent the largest percentage of people who regularly buy something to eat or drink in the morning at least four times a week. In Austria, the figure lies at 39 percent.

Baker in the Morning Drives Away Cares and Worries

Whether or not people think of themselves as Early Eaters, Midday Munchers, or Late Gourmets plays no role in the choice of supplier, which is more dependent on the various times of the day. In the morning, on the way to work, the supermarket and the baker or butcher are the most frequently visited channels. Approximately two thirds of respondents who generally buy something to eat or drink on the go head for these places in the morning. The figure for the supermarket is 68 percent, for the baker or butcher 61 percent. Discounters and petrol stations are similarly frequently visited. In the morning hours, fast-food restaurants, the coffee shop, snack stands, and the kiosk are visited less often. The choice of supplier naturally also depends on the products consumers desire. In the following section, the focus is therefore on the preferred types of food and drink purchased on the way to work – irrespective of whether the consumer is an Early Eater, Midday Muncher, or Late Gourmet.

Filled Rolls and Chilled Drinks are Unbeatable

The choice of product in the morning is dependent on several factors: cultural influences, mode of transport, and distance to work. The choice of drink is clearly not difficult. The far most frequently named chilled refresh-ing drink pushes warm drinks like coffee specialties and tea, as well as milk-based drinks, into second

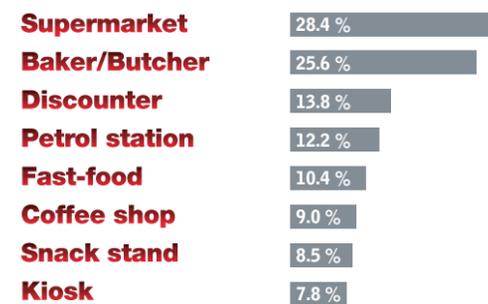
and third place in all countries.

If the countries are considered separately, the citizens of each do, however, maintain their own characteristic features. The morning coffee is holy to the Germans – relatively independently of whether they are Early Eaters, Midday Munchers, or Late Gourmets. As over half of German on-the-go consumers buy a hot drink in the morning, the chilled refreshing drink enjoys less favour here. Those on the move by car or on public transport are also not deterred from buying a hot drink. Regardless of nationality, what is also striking is the positive connection between the consumption of tea and coffee and the length of the journey from home to workplace. The longer consumers are on the move, the more likely they are to choose the hot drink.

Energy in Switzerland Comes off the Shelf

The energy drink is seemingly to the Swiss as coffee is to the Germans on their way to work. A good fifth of Swiss people treat themselves to an energy boost off the shelf while going to work. The majority of those who consume energy drinks on the way to work have a journey time of less than one hour.

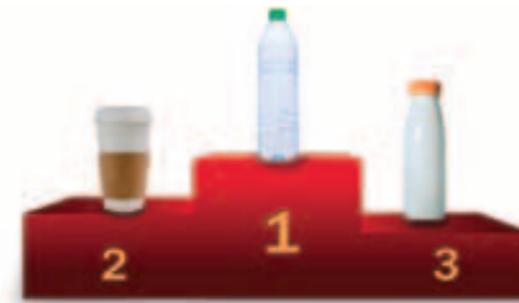
Percentage of people who regularly visit the following suppliers on their way to work:



Winners and Best Sellers in the Choice of Product

Germany holds not only the title as the land of hot drinks but also as the land of filled rolls. Almost three quarters of German consumers buy filled rolls when on the go in the morning. In Austria and in

Top sellers on the way to work — drinks



Refreshing drink 50.9 % / Hot drink 43.4 % / Milk-based drink 21.2 %

Top sellers on the way to work — food



Filled roll 69.1 % / Sweets 33.1 % / Fruit 25.6 %

Switzerland, this figure is noticeably lower, at less than two thirds in both cases. Germany as the land of the filled roll confirms the results of the first Convenience Study in 2008 and further strengthens the country's position as a nation of bread lovers.

Fruit Salad vs. Kaiserschmarrn

Swiss people keep an eye on vitamins when breakfasting. There, with fruit in third place, greater health awareness compared with the Germans or the larger and fresher selection of fruit wins through. In Austria – where fruit ranks fifth, as in Germany – a preference for sweet temptations is evident: even on the way to work, Austrians enjoy something sweet. Cakes are therefore in third place amongst the most frequently purchased products in the morning.

Taboo on Crumbs in the Car

Those who purchase food and drink for immediate consumption on the way to work enjoy these products in very different ways. Whether in the actual place of purchase, in the car, while walking, on public transport, or at the work desk: everything is possible. A fifth of consumers in each country state that they eat their purchased products either at work or in the car on the way there. Whether this concerns food or drinks plays no major role. What is clear, however, is that buyers often eat filled rolls in the place of purchase.

Approx. 20% of Germans stop on the way to work for a roll and coffee.

Seen across the three countries, consumption directly in the place of purchase on the way to work is highly popular, at 16 percent. However, differences between the countries can be observed. A good fifth of Germans use the opportunity to consume their purchased products in the place of purchase. This is slightly less common in Austria and Switzerland, where around 13 percent and nine percent respectively eat on the spot.



Many Germans evidently want to have finished breakfast before reaching their place of work. Eating breakfast at the work desk is more widespread in Austria and in Switzerland. Furthermore, 16 percent of consumers in Switzerland use their time on public transport to eat and drink, just under ten percentage points more than in both neighbouring countries.

Innovation in Demand amongst Germans

The Germans are most willing to try new things. The share of those who state that they almost always or usually buy new products is at approx. eight percent in Germany. Fewer consumers agree with this statement in Austria and in Switzerland. Whether a consumer perceives new food products depends on his inclination for on-the-go consumption. The more frequently someone buys food and drink to go, the more aware they are of new products.

The Early Eater

- Often enjoys breakfast at the kitchen table at home.
- Satisfying hunger, pleasure, and sociability take centre stage for the Early Eater.
- Despite the tendency to have breakfast at home, some Early Eaters regularly buy food and drink while on the go.
- For this, the majority visits a supermarket, a baker or butcher, the discounters, or a petrol station.
- They choose chilled refreshing drinks, coffee or tea, filled rolls, or something sweet.



The Midday Munchers: Energy from Colleagues and the Canteen

When the sun is at its zenith, the time for Midday Munchers has arrived. Whether at home or work, at lunchtime they reach for something to eat or drink primarily to satisfy their hunger and pleasure needs. When lunch is eaten on the go, filled rolls with chilled drinks are popular choices. People who are often on the go buy more energy drinks and warm snacks, while those who are health-conscious consume more yoghurt and fruit.

In contrast to the Early Eaters, Midday Munchers say that lunch on working days is their most important time for food and drink.

Lunch is the most important mealtime for 37% of Germans, 39% of Austrians, and 50% of the Swiss.

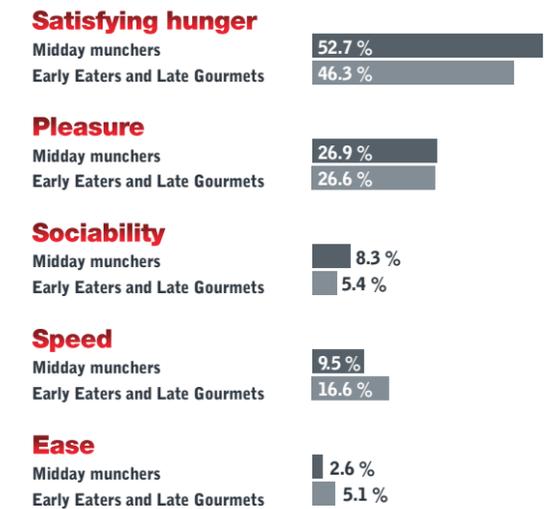
The More Order in the Day, the More Important Lunchtime Becomes

Early Eaters tend to belong to the older generation, are married, and have children. Midday Munchers are usually younger and single people. Half of under-25s in Germany, Austria, and Switzerland prefer eating and drinking at lunchtime. There are also interesting differences between the two groups in their daily routines. The significance of eating at lunchtime evidently also results in a structured day: in comparison with Early Eaters, a significantly higher share of Midday Munchers say that their working days are well-ordered, with just under three quarters of lunchtimers stating they have a regular daily routine. In the other groups, the Early Eaters and Late Gourmets, only just over half of consumers report having a regular daily routine.

Satisfying Hunger and Pleasure Count for Midday Munchers

Which priorities do Midday Munchers have when consuming food and drink at lunchtime? If the motives of satisfying hunger, pleasure, sociability, speed, and ease are placed in ranked order, it can be seen that satisfying hunger and pleasure occupy the top two positions for Midday Munchers. The results in the previous chapter are again confirmed here: at those times at which eating and drinking are classified as important, the need to satisfy hunger comes out on top. At less important times, speed and ease generally take centre stage.

Important to me when eating lunch on a typical working day is ...



Not even one percent of Midday Munchers forego time for eating and drinking at lunch. The situation is different amongst Late Gourmets, a fifth (20 percent) of whom regularly eat nothing in the middle of the day. A small share of Early Eaters (13 percent) also tend to omit food at lunchtime.

Only Early Eaters and Late Gourmets Give Lunch a Miss

If the daytime types are seen as a whole, a comparatively large share of consumers have nothing at all for lunch. Just as many — ten percent in each group — have food and drink while on the go. The number of on-the-go consumers in the middle of the day is particularly high amongst school students and trainees. Where a stop to eat and drink is made at lunchtime is dependent on job-related circumstances. Only just over 20 percent of full-time workers regularly eat and drink at home during lunchtime. More than half of them regularly consume food and drink near their work desk, including the canteen. It is not surprising that the percentage of consumers in part-time professions who eat at home is considerably higher (68 percent). As part-time workers eat at home more and there are more women in part-time work, there are as a whole more women than men who eat lunch at home. However, this trend is determined by employment circumstances. If the full-timers are considered, there are just as many women as men who go home to eat lunch. A still higher percentage of those who eat and drink at home is only found amongst the unemployed or retired (around 80 percent).

Barely any Midday Munchers omit lunch, unlike 20% of Late Gourmets and 13% of Early Eaters.

On-The-Go Consumers like Quick Pleasure Alone

Speed primarily counts for people who eat and drink on the go at lunchtime. Beyond this, interesting features can be observed amongst those who consume on the go at lunchtime at least four times a week. The majority — some 83 percent — place sociability last or last-but-one on their list of priorities when eating lunch. This is considerably more than amongst Midday Munchers who eat lunch at home or near their work desks. In addition, if the significance of pleasure at lunchtime is compared, there are interesting differences between the groups. Consumers who eat and drink at their work desks at lunchtime bestow less importance on pleasure than those who buy something while on the go. When the choice of location consumers use for food and drink at lunch is defined by these priorities, the conclusion is clear: it is evidently more pleasurable to consume food and drink on the go than in many a canteen.

Eating at Home Means Taking a Break

The choice of location is already an indicator of what is important to Midday Munchers. Consumers who eat and drink at home during lunchtime are concerned with satisfying hunger and pleasure. Over half of home Midday Munchers therefore place speed last or last-but-one on their list of priorities. This applies both to people who make themselves something to eat at home over lunch as well as full-time family-oriented people who interrupt their work away from home for a lunch break within their own four walls.

Ease Beats Hunger

The group of not-at-all Midday Munchers evaluates speed very differently. Amongst them, over half say that speed at lunchtime is the most or second-most important thing. For these people, ease at lunchtime is also equally significant. Taken together, speed and ease are evidently sufficient grounds for some to do without food altogether at lunch — these being primarily Early Eaters and Late Gourmets.

What's on the Menu at Lunch?

In comparison with Early Eaters and Late Gourmets, there are barely any differences in what Midday Munchers consume at lunch. But what do people in Germany, Austria, and Switzerland reach for around the middle of the day? There are timeless classics and product groups which go hand in hand with heavy work pressures or a high level of health-consciousness.

More than half of on-the-go consumers in all three countries put the filled roll in first position.

Unity on Chilled Refreshing drinks

There is unanimous agreement on the choice of drink during working hours in Germany, Austria, and Switzerland: the chilled refreshing drink occupies an undisputed first place. It is closely followed by hot drinks. Non-chilled refreshing drinks rank far behind. There is competition for the bottom positions: in Germany, the milk-based drinks, named by twelve percent of workplace consumers, prevails against the energy drink (ten percent), in fourth position. Consumer choices are different in Austria and Switzerland. In Switzerland, just under 15 percent of consumers say they buy energy drinks while at work. In Austria, almost 25 percent of respondents get an energy boost from the can during work.

Filled Roll, Sweet Foods, and Warm Snacks in Top Positions

A still clearer picture emerges when considering the list of favoured foods at lunchtime. By a long margin, the filled roll occupies first place. In all three countries, over half of consumers who eat and drink during work say they purchase filled rolls. The figure is even higher, at over 60 percent, in Switzerland. Across all three countries, one in three treats themselves to something sweet like a bar of chocolate during work, with warm,

savoury snacks like a slice of pizza almost as popular. The preference for savoury foods catapults warm snacks in Germany clearly ahead of sweet foods. By contrast, freshness is valued in Switzerland, where one in four say they buy salad while at work.

The choice of certain products is also dependent on the perceived pressure of work and the health-consciousness of consumers. Consumers with high levels of pressure at work include those with no fixed work location, those who are under strong time pressure, and those who must commute to work over considerable distances. The more mobility the workplace requires, the greater the share (37 percent) of those who feel under particularly great time pressure. Increased mobility requirements also result in an irregular daily routine, which is why these consumers consume chilled drinks, warm snacks, and energy drinks on the go more frequently than others.

Top sellers at lunch — drinks



Chilled refreshing drink 55.1% / Hot drink 49.1% / Non-chilled refreshing drink 22.3%

Top sellers at lunch — food



Filled roll 55.7% / Sweets 33.0% / Warm snack 31.5%

Healthy while On The Go, Too

Despite changes to the product range, on-the-go consumption still has to contend with the received prejudice of being unhealthy. This prejudice is refuted by almost 52 percent of respondents who classify themselves as health-conscious and purchase food and drink for immediate consumption during working hours. Almost 30 percent of health-conscious people thus buy salad and fruit while on the go at work. One in ten of those who value a balanced diet add yoghurt to their menu.

Healthy and Sweet Foods in Demand amongst Women

The product preferences in the gender comparison show that some traditional assumptions are nevertheless legitimate. While men more often say they buy energy drinks and warm snacks, women more frequently name salads, fruit, and yoghurt. It is therefore not surprising that more than half of female consumers are to be categorised as health-conscious. The figure for men is only just over 40 percent. However, women do also have a sweet tooth: considerably more women than men are tempted by sweets and cakes.

Small but Important: Differences in Evaluating the Product Range

Irrespective of the circumstances surrounding on-the-go consumption, consumers are in disagreement as to whether the on-the-go range of food and drinks is to be classified as healthy. Consumers' judgements on the food and the drinks product ranges barely differ. This is surprising, as the preliminary interviews for the first study in 2008 showed that packaged products such as drinks with detailed ingredient information provide consumers with more certainty on ingredients and calories than fresh, unpackaged products such as filled rolls.

The Midday Muncher

- **First choice are filled rolls with chilled drinks.**
- **Midday Munchers tend to be younger and single people.**
- **Mobile Midday Munchers buy more energy drinks and warm snacks.**
- **Speed is of the essence for Midday Munchers who buy food and drink to go at lunch.**



Late Gourmets: Sun Downers within Their Own Four Walls

The later the day gets, the more pleasant or important eating becomes: at least that's what Late Gourmets say. While preferences with regard to eating and drinking in the morning and at lunchtime are highly divergent in the countries studied, the situation in the evening is more consistent. Around a third of respondents in Germany, Austria, and Switzerland favour eating and drinking in the evening.

Three Countries — One Evening Trend

Switzerland is the country of Midday Munchers. Half of the Swiss prefer food and drink at lunchtime. The Germans have a greater propensity for breakfast. But how are Late Gourmets distributed in Germany, Austria, and Switzerland, and how important is this group? In total, a little over a third of citizens designate themselves Late Gourmets, regardless of which country they come from. This means that the group of people who find eating and drinking in the evening important is larger than the group of Early Eaters in all countries. There are similar numbers of Midday Munchers and Late Gourmets in Germany and Austria.

Late Gourmets Enjoy Sociability with Partners in the Evening

Who are the people who find this time for eating and drinking especially important? The cliché of it being full-time workers who particularly look forward to dinner with their partner or family after a tiring day's work is only partially true. It is correct that Late Gourmets tend to be married or living in steady relationships more than Early Eaters or Midday Munchers, and they tend to live with their partners together in one household. However, while the Early Eaters are older, Midday Munchers and Late Gourmets do not differ from one another with regard to age or gender.

Home Sweet Home: Important Mealtimes and Drinks Only at Home?

What is more interesting is where food and drink is consumed in the evening after a normal working day. Some look forward to finally getting home after a tiring day's work and being able to indulge in some pleasure within their own four walls, while others see going out or doing some sport and then eating or drinking on the go as important after the working day is over. What is clear is that this important mealtime is not omitted. Only a minuscule number of Late Gourmets eat nothing in the evenings. For the other types of consumer, this is far less common.

What kinds of food and drink does the Late Gourmet consume? Should the circumstances be sociable, or is satisfying hunger quickly important in the evening? The first thing that can be ascertained is that everyone wants to satisfy their hunger. There is no perceptible difference between the Early Eater, the Midday Muncher, and the Late Gourmet when it comes to this aspect. Things are different with regard to speed. In the comparison of types, there are considerably fewer Late Gourmets for whom speed counts in the evening. Ease, too, is far more important to the other two consumer types than those who consider the evening important for eating and drinking. When dinner, together with water, fruit juice, or beer, is essential, pragmatic reasons retreat into the background: sociability and pleasure are more decisive here. In comparison with Early Eaters, around twice as many Late Gourmets state that

sociability in the evening while eating and drinking is most or second-most important. This shows that Late Gourmets evidently like enjoying life with friends and family in the evening. A quick raid of the fridge before starting the next activity is not the Late Gourmet's thing. In this latter case, they prefer to get something to eat or drink while on the go. However, regularly eating and drinking while on the go in the evenings more than three times a week is not typical of Late Gourmets. Less than three percent of respondents in this category adopt this behaviour.

Lunchtime and Evening Popular for On-The-Go Consumption

In total, 47 percent of consumers say that they fit in a stop for something to eat or drink on the way home at least once a week. The time window at the end of the day thus lands in second place for on-the-go consumption situations on working days. The range of on-the-go products is most frequently made use of around lunchtime (53 percent), while the fewest consumers make purchases on the way to work (42 percent). Although the range of products preferred on the way home displays no differences to that at lunchtime, the percentage distribution of products named suggests altered preferences. While the choice of drinks is again uniform, the top three food products bought on the way home lie considerably closer to one another.

Chilled Refreshing Drinks Unbeatable

Irrespective of country and time of day, the chilled refreshing drink occupies the most stable position. Those consumers who stock up on products for immediate consumption on the way home also cite the chilled refreshing drink most frequently (45 percent) – clearly ahead of non-chilled refreshing drinks (23 percent) and hot drinks (16 percent). However, second place for non-chilled

refreshing drinks does not mean that these are particularly in demand in the evening but is rather a consequence of the

alternative products being far less in favour during the evening. While hot drinks are very popular at other times, neither caffeine nor a great desire to feel full up seem to be in demand. Especially amongst consumers who can be classified as Late Gourmets, the frequency of demand for hot drinks or milk-based drinks is below average. The coffee-loving Germans are responsible for the fact that hot drinks make it into the group of top three products at all. If the three countries are considered separately, hot drinks do considerably worse. While they take a good third place in Germany, they are pushed down by the energy drink in Austria and Switzerland and cannot even be found within the top five in the land of Café Schümli.

A Beer after Work is More Common in the City

For the first time in the course of the consumers' day, alcoholic drinks also play a role on the way home. 14 percent of consumers who purchase products for immediate consumption on the way home thus say they buy chilled alcoholic drinks like beer. In the country comparison, there are barely any differences in the popularity of these products. However, differences in alcohol consumption can be demonstrated with reference to the region in which consumers live. In distinguishing major cities, medium-sized and small cities, and rural regions, a clear city-country divide emerges (17 percent against eleven percent) in chilled alcoholic drinks bought for immediate consumption on the way home.

The typically longer commutes from work to home in rural regions may be relevant here. The picture of product choice for eating is considerably less clear. Although filled rolls (33 percent), sweets (27 percent), and warm snacks (26 percent) emerge in all three countries as the preferred products of those who make a stop on the way home, other products are also named similarly frequently. These include salad (24 percent), fruit (24 percent), and ice cream (21 percent), named by more than one in five consumers. In Germany, the top three products of filled rolls, warm snacks, and sweet foods clearly leave fruit,

Top sellers at dinner — drinks



Chilled refreshing drink 45.2 % / Non-chilled refreshing drink 22.8 % / Hot drink 16.2 %

Top sellers at dinner — food



Filled roll 31.6 % / Sweets 27.3 % / Warm snack 26.2 %

ready meals, salad, and cakes behind. However, the top sellers are purchased in almost equal share (20 percent) by those who consume on the way home. Salad manages to occupy second place in Austria and Switzerland, where almost 27 percent and 29 percent respectively say they buy salad. At least in part, this suggests a considerably more widespread health-consciousness in Switzerland than in Germany and shows that the broader product range there has found acceptance.

The Late Gourmets Want Something Substantial on the Way Home

If the consumption habits of the Late Gourmet are specifically considered, two trends can be ascertained: the products which can replace dinner — rolls, ready meals, and warm snacks — are more frequently purchased by Late Gourmets than others on the way home. On the other hand, a below-average consumption level of products which represent more of a small snack between meals, such as crisps, yoghurt, sweets, or cake, is striking.

Major City or Country Influence Taste

Where you live makes a difference. With reference to mention of warm and cold snacks, as well as fruit, it is striking that these are bought far more frequently by people on their way home in major cities than in rural areas. On the one hand, this fact is evidently a reflection of the far higher density of sales outlets with products for on-the-go consumption in major cities. On the other hand, it is conspicuous that there is a connection between family status and the place of residence of a consumer. The density of married people in the country is higher than in major cities, where more single people live. Small and medium-sized cities lie in between.

The Late Gourmet

- Late Gourmets tend to be married or live in steady relationships.
- It is not speed but sociability and pleasure which count for the Late Gourmet.
- Irrespective of country or circumstances, the chilled refreshing drink scores points in the evening, with alcoholic drinks playing a role for the first time.
- The Late Gourmet buys filling foods like rolls, ready meals, and warm snacks more often in the evening than other consumer types.



Leisure-Time Preferences: Germans Pragmatic, Austrians Passionate

During leisure time, the daily routines of many people are not set in stone. This also applies to eating and drinking. However, opinions do differ on one point. Is it pleasure and sociability or satisfying hunger, speed, and ease which is more important when eating? The answer: preferences, and not demographic variables, play the most important role here.

Work days and days off fundamentally differ with regard to general eating and drinking behaviour and on-the-go consumption. The course of the day is essentially determined more freely on days off. By contrast, working days proceed according to set time-related patterns for many people. This behaviour means it is more useful to analyse the various consumer types in leisure time according to priorities in consumption than to time of day. Is sociability called for, is pleasure the defining factor, or is speed of the essence?

Pleasure Wins in Leisure Time

The significance of speed when eating and drinking on days off generally declines in favour of pleasure. Nevertheless, consumer preferences in free time do also differ. If sociability or pleasure are comparatively important to consumers when eating and drinking on the move, they are termed Social Eaters. If satisfying hunger, speed, or ease are comparatively most important, they are called Purpose Eaters. Both types make up around half of the respondents each. Even if the population can be classified according to the two groups in approximately equal proportions, cultural differences can be discerned. The highest share of Purpose Eaters is found in Germany, at a little over half of respondents. By contrast, the share of Social Eaters in Austria is comparably high. A balanced mixture of both types is found in Switzerland. Across the three countries, satisfying hunger is more important than speed and ease for most Purpose Eaters, while

pleasure wins out over sociability for Social Eaters. Over 60 percent of Social Eaters would evidently prefer to enjoy their food alone than do without pleasure in social company.

Purpose Eater



Social Eater



Leisure-Time Consumption Not a Question of Age or Gender

Being a Purpose Eater or a Social Eater is not dependent on age or gender. A small difference can be observed with regard to family circumstances — married people, with or without children, are more frequently Social Eaters than unmarried couples or single people. Both leisure time types display similar on-the-go consumption behaviour. They often eat and drink while on the go and thus demonstrate a similarly strong tendency for convenience.

The Purpose Eater at the Discounter and Snack Stand — Social Eater in the Restaurant

Purpose eaters have a clear inclination for the discounter and the snack stand. Enjoying pragmatic, that is quick and easy, consumption evidently also means shopping in this manner. By contrast, the Social Eater

visits social and pleasure-oriented channels such as restaurants and coffee shops comparatively more frequently. The differences between the two types with regard to other suppliers such as the baker, the petrol station, or the fast-food restaurant, are not so clear. While a stop is particularly often made at the baker or petrol station on the way to work, the supermarket scores points on the way home as an outlet for on-the-go consumption. Restaurants, as well as fast-food restaurants, are the definitive leisure-time channels on free days.

Social Eaters Like it Healthy

While more than 51 percent of Social Eaters consider themselves health-conscious, the figure amongst the pragmatic Purpose Eaters is only 42 percent. The Social Eaters who look after their health accordingly reach for chilled refreshing drinks, alcoholic drinks, rolls, ready meals, warm and cold snacks, crisps, and sweets less often than is overall the case. In return, milk-based drinks, salads, fruit, and yoghurt enjoy all the more popularity.

Sweet Ladies — Savoury Gents

The typical classification of genders in product choice can be seen not only on work days but also during leisure time. Although women more often say they buy healthy products like salad and fruit, they also like indulging in sweets like chocolate bars, cakes, or ice cream. Men, on the other hand, favour crisps and hot and cold drinks considerably more often in their free time. The cliché of men more often reaching for alcoholic and energy drinks is also confirmed with regard to choice of drink.

Alcohol is also Fine in Leisure Time

In general, Germans and Austrians seem to indulge in alcoholic drinks in their free time more often than is the case in Switzerland, where, by contrast, an above-average number of consumers say they consume energy drinks in their leisure time.

Top Positions Already Taken

In all countries, rolls, cold drinks, and coffee & co. dominate not only on working days but also in leisure time. The choice of drinks in free time also appears to be a particularly easy one. Regardless of leisure consumer type, almost two thirds of consumers state that they buy chilled drinks while on the go. The chilled refreshing drink is a classic whose consumption requires neither particular circumstances nor is dependent on nationality, age, gender, or other characteristics. Furthermore, the two groups are not only in agreement regarding the number one choice in leisure time. Both across the three countries and within them, there is overwhelming agreement that hot drinks (40.6 percent) and chilled alcoholic drinks (30.8 percent) occupy second and third place in leisure time.

Top sellers in leisure time — drinks



Purpose Eater: Chilled refreshing drink 62.3 % / Hot drink 36.7 % / Chilled alcoholic drink 27.5 %

Social Eater: Chilled refreshing drink 64.4 % / Hot drink 44.2 % / Chilled alcoholic drink 33.9 %

Practical for the Purpose Eater — Pleasurable for the Social Eater

If positions further down the table are considered, the choice of product underscores the character of the two leisure types: while the Purpose Eater holds more store by the functional benefits of vitalising energy drinks, Social Eaters treat themselves more frequently to the pleasures of warm drinks like a cappuccino during leisure time, as well as alcoholic drinks like a chilled Pilsner or wine.

The Classic: Filled Rolls

The situation is more diverse when considering food in leisure time. Across the countries, first place is occupied by the usual suspect – the filled roll, primarily indebted to loyal consumers in Austria and Switzerland for its top position. Things are different in Germany, where the table is headed by warm snacks such as a slice of pizza or a bockwurst.

A look at the leisure types confirms the fact that the Social Eater experiences life in all its diversity when eating. However, the picture is decidedly less clear than it was when considering the choice of drinks.

Top sellers in leisure time — food



Purpose Eater: Filled roll 40.5 % / Warm snack 39.9 % / Ice cream 34.1 %

Social Eater: Filled roll 43.8 % / Warm snack 40.0 % / Ice cream 39.8 %

Social Eaters boost the filled roll's top position but also state considerably more often that they buy salad, fruit, cakes, or ice cream. In contrast to the Social Eater, the Purpose Eater resorts more frequently to the lower-ranked cold snacks and ready meals, i.e. quick and easy products, and has generally less time for fruit, sweets, cakes, or ice cream.

Purpose Eater and Social Eater

- The importance of pleasure when eating and drinking on the go generally increases on days off.
- Purpose Eaters and Social Eaters make up around half of respondents each.
- Both leisure time types frequently eat and drink while on the go and thus display a similarly high inclination for convenience.
- The restaurant and fast-food restaurants are very popular channels on days off.
- The choice of product underscores the character of the leisure type: functional products like energy drinks for the Purpose Eater, hot drinks like a cappuccino for the Social Eater.

Overview Work and Leisure Types

On working days

In leisure time

	Early Eaters (23 %)	Midday Munchers (41 %)	Late Gourmets (36 %)	Social Eaters (50 %)	Purpose Eaters (50 %)
Most important mealtime / place of consumption	Breakfast / at home	Lunch / dependent on place of work and employment situation	Dinner / at home	37.5 % breakfast 28.5 % lunch 33.9 % dinner	32.2 % breakfast 35.1 % lunch 32.7 % dinner
Share of consumer type	D 27.1 % A 24.4 % CH 14.0 %	D 36.6 % A 38.7 % CH 50.4 %	D 36.2 % A 36.9 % CH 35.9 %	D 45.9 % A 53.9 % CH 51.2 %	D 54.1 % A 46.1 % CH 48.8 %
What is important and to whom?	Family with young teenage children - satisfying hunger - pleasure	Young and free - satisfying hunger - sociability	Being together with my partner and family is the most important thing in the evening - sociability - pleasure	Being a social epicure or a pragmatist is a question of preferences, not of demographic variables. Of primary importance are: - sociability - pleasure - satisfying hunger - speed - ease	
Inclination for on-the-go consumption (trends)	<p>Share of on-the-go consumers within the group of corresponding consumer types on working days</p>			<p>Share of on-the-go consumers within the group of corresponding leisure types</p>	
Everyday or leisure channel?	Supermarket, specialty store		Discounter, petrol station, kiosk, coffee shop		Snack stand, fast-food restaurant, restaurant
Top products (across situation and type on basis of all entries)	Drinks 1 Chilled refreshing drinks 2 Hot drinks 3 Non-chilled refreshing drinks 4 Energy drinks 5 Chilled alcoholic drinks		Food 1 Filled rolls 2 Warm snacks 3 Sweets 4 Ice cream 5 Fruit		



Wanted: The Channel for On-The-Go Consumption

Convenience can be found in all channels. This result from the 2008 Convenience Study was investigated more closely in 2009. Which suppliers are called on most frequently at a stop for on-the-go consumption, and under what circumstances?

Who Are You, Dear Customer?

Who goes to the supermarket for on-the-go consumption? Who is the typical fast-food restaurant guest? These are questions which are of great importance to suppliers. Only those with knowledge of which customers use which channels can focus their attention accordingly.

In this regard, a comment on the study's methodology: the evaluation of the top channel is based on the information regarding frequency (most, second-most, and third-most often) and situations of the customer visit. Respondents were asked whether the supplier was called on most, second-most, or third-most frequently, as well as at what time, for example on the way to work or during the working day. The top channel is the one which takes all statements on frequency into account and has the highest importance across all situations.

Who buys what when on the go? Regular and loyal customers, and their channels

		Supermarket	Discounter	Baker/Butcher	Petrol station	Snack stand	Kiosk	Fast-food	Restaurant	Coffee shop
Share of regular customers of food and drink to go	D	68	44	68	39	24	48	42	26	29
	A	69 %	41 %	60 %	32 %	24 %	33 %	36 %	27 %	25 %
	CH	73	37	49	46	39	28	32	26	20
Inc. top channel customers (loyal fans)	D	24	13	25	6	3	8	11	3	6
	A	37 %	9 %	19 %	9 %	4 %	6 %	8 %	4 %	5 %
	CH	44	5	13	15	8	4	2	4	3

Regular customers: consumers who in recent weeks regularly visited one channel, i.e. most frequently, second-most frequently, or third-most frequently, and this either on the way to work, during working hours, on the way home, or in leisure time.

Loyal fans are consumers who, regardless of situation (on the way to work, during working hours, on the way home, or in leisure time) and frequency (most frequent, second-most frequent, or third-most frequent), named the corresponding channel the most often in absolute terms.

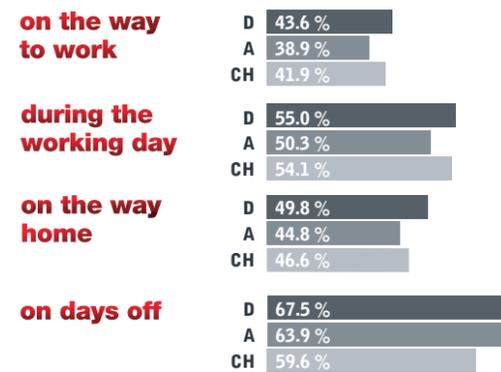
On-The-Go Consumption: The Question of Where?

The supermarket and specialty stores like bakers and butchers have the highest share in absolute terms of customers in on-the-go consumption. While the supermarket does particularly well in the international overall evaluation on statements by Austrians and the Swiss, the Germans push up the average values for specialty stores and the snack stand. The large share of on-the-go consumers at the discounter is partly due to the Germans and Austrians. The opposite is true for the petrol station and kiosk, which are visited by an above-average number of Swiss people. Almost half of them call on the petrol station while on the go; the figure for the kiosk is just under 40 percent, while in the other countries, at only 25 percent, it is far lower. These results do not account for the circumstances in which consumers buy food and drink to go and where they do so.

On-The-Go Offers Freedom in Free Time

Free time in Germany, Austria, and Switzerland is predestined for on-the-go consumption. Around two thirds of consumers say they buy food and drink to go while on the move on their days off at least once a week. The largest share is found amongst the Germans, followed by the Austrians and then the Swiss. The situation is no different on working days, on which, however more Swiss people are inclined to eat and drink on the go than Austrians. In terms of percentages, however, both countries are behind the Germans here too. Working hours present a popular opportunity for many people to buy things on the go. Just under 42 percent of respondents make a stop to go shopping on the way to work, while the figure of those who do so on the way home lies at over 47 percent.

Percentage of consumers who buy something to eat and drink on the go at least once a week, and this ...



Leisure-Time Suppliers and Working Day Channels

Food retailers and specialty stores are particularly used on working days for on-the-go consumption. The snack stand is popular during working hours in the lunch break. The baker or butcher are also chosen considerably more frequently at lunchtime. Channels at the top of the list on the way to or from work are the supermarket, the petrol station, and the kiosk.

Candidates for the Entire Week

The petrol station and kiosk may be called on by a slightly higher number of consumers on working days, but there is no distinct difference in frequency of visit to these channels during free time: while 27 percent/19 percent visit the petrol station/kiosk on working days, the figures in free time are 25 percent/17 percent. On working days, as in leisure time, a relatively high number of respondents also put in a stop at the discounter. The coffee shop, which with the kiosk has the smallest share of visitors, also records a similar number of consumers in leisure time as on working days. The discounter, petrol station, kiosk, and coffee shop therefore cannot be unambiguously placed in one category of leisure time or working day channels: they are equally represented throughout the entire week.

Restaurant and Snack Stand Popular in Leisure Time

As a whole, the restaurant is visited relatively rarely for food and drink while on the go. When a stop is made there, however, it is a strong leisure-time channel for on-the-go consumption with a relatively high percentage difference to working days. The fast-food restaurant, with considerably more visitors than the restaurant, is also an on-the-go location chosen by a higher share of consumers in free time than on working days.

Percentage of "loyal fans" of corresponding channels

	Germany	Austria	Switzerland
Specialty store	25 %	52 %	44 %
Supermarket	24 %	14 %	16 %
Discounter	13 %	9 %	13 %
Fast-food			
Specialty store			

Percentage of consumers who buy food and drink to go in the given situation at the given channel regularly, at least once a week.

	Way to work	During work	Way home	Normal working day	Day off	Total customers
Supermarket	+	-	+	67 %	62 %	68.8 %
Discounter	-	-	+	34 %	32 %	41.1 %
Baker	+	+	-	55 %	48 %	59.8 %
Petrol station	+	-	-	27 %	25 %	31.8 %
Kiosk	-	-	+	19 %	17 %	24.1 %
Snack stand	-	+	-	23 %	27 %	32.7 %
Fast-food	-	-	+	27 %	32 %	36.0 %
Restaurant	-	+	-	13 %	28 %	27.1 %
Coffee shop	+	+	-	19 %	20 %	25.2 %

Loyal Fans and Cultural Differences

It is not only the “loyal fans” of the respective supplier but also cultural differences which are revealed when considering the aspects leading to the choice of top channel. There are major differences between Germany, Austria, and German-speaking Switzerland in the choice of top channel. In Germany, the specialty store and the supermarket, as suppliers for on-the-go consumption, have a similar number of loyal fans, in both cases around a quarter of respondents. The picture is more straightforward in Austria and Switzerland, where around half of citizens choose the supermarket for on-the-go consumption. The second-most and third-most frequently chosen channels are the less-visited specialty stores, the petrol station, and the fast-food restaurant.

Supermarket: A Hidden Source for On-The-Go Consumption

The supermarket serves traditional food shopping as a medium-size self-service retail business with a range of between 7,000 and 12,000 products. But it also plays an important role in on-the-go consumption.

Percentage of citizens who use the supermarket most frequently for on-the-go consumption



Supermarket is King of On-The-Go Consumption in Austria and Switzerland

The share of the population which visits the supermarket for on-the-go consumption most frequently in Austria and Switzerland is comparatively high. Specialty stores follow far behind in Austria, the petrol station in Switzerland.

Specialty Stores Beat the Supermarket in Germany

Only around one in four Germans (24 percent) say they go to the supermarket most frequently while on the go, which as a result occupies second position amongst the most-visited channels. Specialty stores, with a slightly higher percentage, sit at the top of the table. The evaluation is understandable, since German supermarkets are viewed more critically in international comparison. In terms of selection, competitive pricing, accessibility, cleanliness, friendliness, and speed, supermarkets are evaluated better in the neighbouring countries.

First Choice on the Way Home

On working days, around two thirds use the supermarket at least occasionally for on-the-go consumption, a little fewer on days off. 68 percent of consumers buy food and drink to go at the supermarket on the way to work. It carries the most weight on the way home, when almost three quarters call in at the supermarket.

Young Unmarried People go to the Supermarket

Supermarket customers for on-the-go consumption tend to be female and younger. Retired persons, for example, use the supermarket relatively less often than other channels when buying food and drink to go. In the channel comparison, supermarket customers are also typically unmarried and have fewer children.

Accessibility, Selection, and Cleanliness Valued

Supermarkets are particularly valued for accessibility, selection, and cleanliness by on-the-go consumers. They fare well on account of their geographically dense distribution and broad product range. The greatest weakness in comparison with specialty stores, for example, is their anonymity.



Discounter: Good Prices for the Price-Sensitive

Discounters play a role in on-the-go consumption. They offer customers an admittedly limited product range, albeit one which is evaluated as good by consumers, at attractive prices. They are also generally considered easily accessible and quick.

Germany is Discounter Country

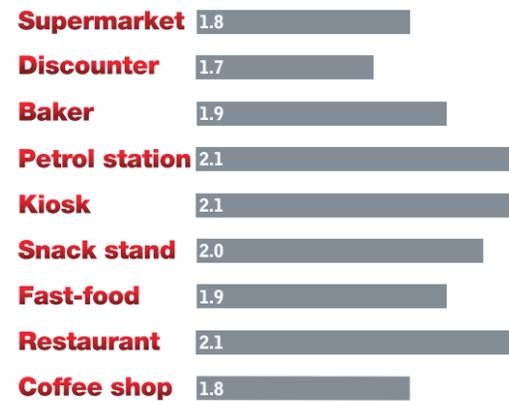
In Germany, 13 percent name the discounter their top channel for on-the-go consumption. A considerably smaller share of customers choose the discounter in Austria, and in Switzerland, too, less than five percent of customers across all situations select it. This is hardly surprising, given that Germany is considered the origin of this trade channel.

On-The-Go Consumption?

Yes! — At a Premium? No!

Despite the higher density of discounters in Germany, the figures also illustrate the oft-cited price sensitivity of this country's people. Price sensitivity is expressed, for example, in the willingness to compare the prices of various products or suppliers. By contrast, price consciousness is far less pronounced in Austria and Switzerland, another reason why the discounter is less popular in these countries. Indeed, price sensitivity is a key factor in the decision in favour of the discounter for customers in all countries. It can also be seen that women are more price-sensitive than men. Although around three quarters — the majority — of both genders claim to be price-sensitive, the figure for women, at 81.8 percent, is more than three quarters, for men, at 73.5 percent, less than three quarters. Nevertheless, both genders use the discounter in approximately equal numbers.

Price Sensitivity



(1 = very price-sensitive to 5 = not price-sensitive)

Customers who buy food and drink to go in restaurants, petrol stations, and at kiosks are less price-sensitive than those who use the discounter, supermarket, or the coffee shop for this.

Discounter: Affordable, Accessible, Quick

Discounters are considered affordable and easy to reach. But are they also perceived in this way by customers? Discounter consumers evaluate shopping in this channel as more affordable than the average, easily accessible, and quick. As speed and accessibility are important factors in on-the-go consumption, the discounter's appeal as a potential source of on-the-go consumption in Germany is understandable. With its self-service format, the discounter shares the fate of the supermarket and is also perceived as somewhat anonymous.

Baker and Butcher Score Points for Friendliness

The baker and the butcher — these specialty stores are often characterised by a small shop floor, personal service, a limited choice of products, and an average to slightly above-average price point. They are primarily used at the start of the day as a channel for on-the-go consumption.

The Specialty Takes the Lead

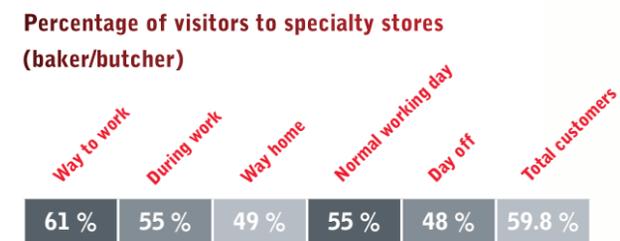
In Germany, specialty stores are the most-frequently visited channels in on-the-go consumption. More than one quarter of Germans regularly use their services to buy food and drink to go and select them as the top channel, even ahead of the supermarkets. The numbers of on-to-go visitors to the top channel of specialty stores in Austria and Switzerland are lower: 14 percent in Austria, 13 percent in Switzerland. Across all countries, specialty stores represent the top channel for just under a fifth of consumers.

Young and Female Choose Specialty Store

Customers of specialty stores are comparatively health-conscious, somewhat younger, and tend to be female. In comparison with non-customers, they have a slightly lower gross income.

The Way to Work Leads Past the Baker and Butcher

Specialty stores particularly become the focus of attention on the way to work, when 61 percent of consumers



say they take them into consideration for on-the-go consumption. This may be due to the fact that a high quality of breakfast is ascribed to specialty stores.

Loser in the Course of the Day

However, interest in specialty stores for on-the-go consumption drops in the course of the day. They are visited by 61 percent on the way to work and still more than half (55 percent) of respondents during working hours. On the way home (49 percent) and in leisure time (48 percent), the share drops to less than half of consumers.

Friendliness First

Specialty stores are evaluated as clean and accessible. Visitors also value the friendliness of staff. The greatest room for improvement in specialty stores is considered the area of affordability. They are perceived as most affordable in Germany.



Representative Throughout the Week: The Petrol Station

Consumers can buy food and drink to go at most petrol stations – often around the clock. Petrol stations are thus increasingly becoming established as suppliers of food and drink and positioning themselves as on-the-go channels.

Switzerland Chooses the Petrol Station

In the country comparison, differences can be seen in the petrol station's role as an on-the-go supplier. In Germany, it is the top channel for nine percent of consumers, in Austria for only five percent. By contrast, 16 percent of people across all situations visit this channel most frequently in Switzerland. After the supermarket, the petrol station occupies second position in the Swiss top channels ranking.

First Stop on the Way to Work

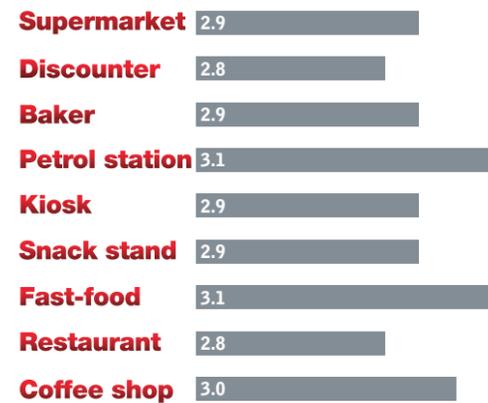
During the week, petrol stations are especially popular on the way to work. 29 percent choose the petrol station while going to work, 27 percent on their way home. The figure during working hours and in free time, at 25 percent in both cases, is only slightly lower. The petrol station is thus not obviously either a leisure time or working time channel, but is represented throughout the week.

Friendliness and Accessibility is the Order of the Day

In total, over 80 percent of consumers evaluate the petrol station as easily accessible, the transaction as quick, and the staff as friendly. The greatest room for improvement, according to customers, lies in the area of affordability. Only one in four thinks that the selection is good and around one in ten that the product purchased represents good value. In

Germany, the greatest need for improvement regards pricing. Petrol station customers are predominantly between 25 and 55 years of age and are comparatively inclined to buy food and drink to go. This inclination is the second-most pronounced in comparison with customers of other channels.

Inclination for On-The-Go Consumption



(1 = not very inclined to 5 = very inclined)

Petrol Station Customers Work On The Go

Petrol station customers are pressed for time and tend to work at varying locations. Customers of the petrol station tend to be male. Regular customers, at just under 32 percent, consist of 37 percent of men and a little under 27 percent of women. Both groups judge the accessibility, selection, cleanliness, and affordability of the petrol stations as similarly good. In addition, petrol station customers in Germany earn a little more than the non-customers amongst respondents.

Kiosk and Refreshment Stand: Grüzi Urs!

Kiosks and refreshment stands are sales outlets with a limited product range. Their main focus includes drinks, tobacco and sweet foods, and occasionally also snacks. Kiosks are typically found in populous locations in urban areas easily reachable on foot.

The One and Only: The Swiss are Loyal Kiosk Fans

Kiosks and refreshment stands are the on-the-go top channel for an average of four percent of consumers. In the country comparison, it is particularly the Swiss – eight percent – who favour kiosks and refreshment stands for their on-the-go consumption. If the consumers who do not name the kiosk as top channel but do take it into consideration for their on-the-go consumptions are taken into account, the share of kiosk consumers increases and remains constant across a range of situations.

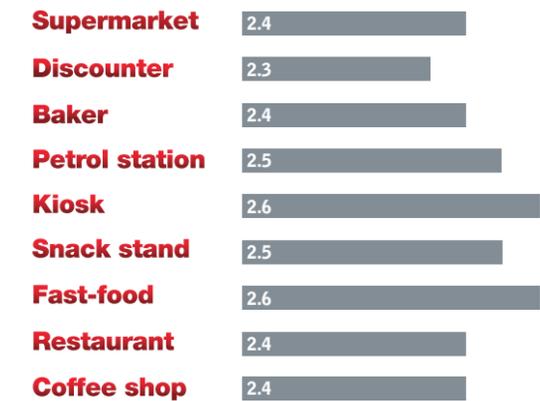
Provisions on the Doorstep

Consumers perceive kiosks and refreshment stands as easily accessible, quick, and personal. The good accessibility is a consequence of the fact that many customers live within walking distance. This proximity evidently has its effect: kiosk customers see the personal touch as the channel's major strength. From the consumer point of view, the small range of products is particularly in need of improvement. Alongside the core range like tobacco products and magazines, a selection of frequently desired and therefore quick-selling food and drinks could be helpful here. It should meet local needs and could represent a fruitful expansion of the product range according to customer wishes.

Because It's Fun: Off to the Kiosk or Snack Stand

Customers of kiosks, fast-food restaurants, and snack stands have the greatest joy in on-the-go consumption. Two of these channels are perceived as having a particularly personal touch, the kiosk and the snack stand. Discounter customers have a very different opinion: buying food and drink on the go gives this group comparatively the least joy.

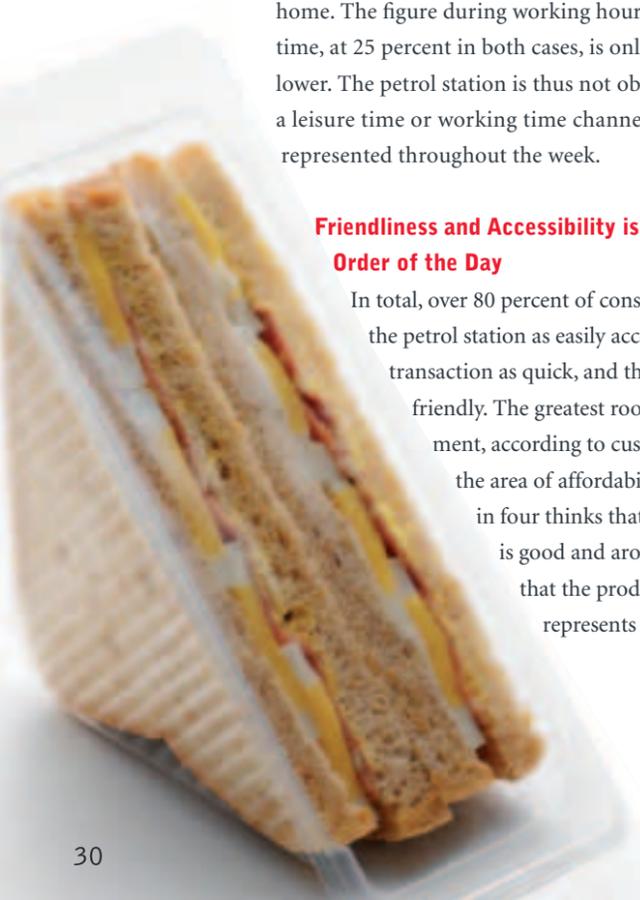
Joy in On-The-Go Consumption



(1 = very little to 5 = a lot of joy in on-the-go consumption)

Kiosk Customers are Young and Not Very Price-Sensitive

Whether or not it is the joy in eating and drinking on the go, one thing is sure: kiosk customers are less price-sensitive than those who do not buy at the kiosk. On average, kiosk customers are younger than those who make use of other channels.



A Short Break on the Quick: The Snack Stand

With quick and easy food products, snack stands play a role in on-the-go consumption. They often have bar tables which invite guests to spend at least a little time there, making the snack stand ideal for a short break on the go.

Snack Stand Boosts its Image

The snack stand is named comparatively frequently as the top channel in on-the-go consumption by the Germans. The share in Austria and Switzerland is around 50 percent smaller. In the country average, six percent name the snack stand as their top channel, i.e. the channel they visit most frequently and across all situations while on the go.

The Snack Stand is In During Work and Leisure Time

The snack stand is popular as a source of on-the-go consumption not only during work but also in leisure time. This may be due to the more savoury product range, which is less in demand in the morning. On their way to work, only one in five call on the snack stand, which thus occupies third-last position in channels visited at this time of day. It is visited by over a quarter of consumers (26 percent) during working hours and thus presumably often serves as a location for the lunch break. The figure drops to 22 percent on the way home. On free days, the snack

stand is on the on-the-go consumption list of 27 percent of respondents and thus becomes the definitive leisure-time channel.

In Front of Your Eyes: Speed is the Objective

At snack stands, consumers particularly value the personal atmosphere, staff friendliness, and speed. However, the selection offered at snack stands tends to be evaluated as a weakness. This is not necessarily down to the variety, i.e. the quantity, but may also be due to the quality on offer. This can be seen in comparison with specialty stores, which also exhibit little variety: almost 70 percent of specialty store visitors evaluate the selection as good or very good, the figure at the snack stand is only 40 percent.

Snack Stand Popular in the City

The daily routine of snack stand customers is less ordered in comparison with non-customers, and visitors tend to live in urban areas. They are more frequently male than female; their Body Mass Index (BMI), however, does not differ significantly from customers with other channel preferences.

Where do loyal fans of individual channels eat and drink?

	Supermarket	Discounter	Baker/butcher	Petrol station	Snack stand	Kiosk	Fast-food	Restaurant	Coffee shop
Directly in place of purchase	11.7 %	12.0 %	13.0 %	9.6 %	14.9 %	40.4 %	31.3 %	42.1 %	27.5 %
On the go	46.4 %	48.6 %	49.3 %	68.1 %	59.5 %	38.6 %	44.0 %	35.5 %	49.5 %
At work desk	25.9 %	20.2 %	29.4 %	17.5 %	17.6 %	14.0 %	12.7 %	18.4 %	16.5 %
At home	16.1 %	19.1 %	8.3 %	4.8 %	8.1 %	7.0 %	12.0 %	3.9 %	6.6 %

Fast-Food Restaurant: McLeisure Channel

Food and drinks for rapid consumption are the essence of fast-food restaurants. The time from order to consumption is often only a few minutes. Seating means the products can be enjoyed on the spot. The food and drinks are usually packaged in such a way that they can also be consumed while on the go.

The Swiss Skip Fast-Food Restaurants

In the country comparison, eight percent name the fast-food restaurant as their top channel. The share of Germans who visit the fast-food restaurant most frequently for on-the-go consumption, at just over ten percent, is only marginally greater than the corresponding share of Austrians. With two percent, fast-food restaurants are named least frequently in Switzerland and occupy last position in the top channel ranking there.

Favourite for Free Time

The country analysis for fast-food restaurants shows them to be particularly popular in leisure time and visited by almost one third of those who regularly buy food and drink to go in their free time. Outside of leisure time, fast-food restaurants are most frequently chosen on the way home, thus often taking the place of dinner at home for 30 percent of respondents. Around a quarter of respondents visit this channel on the way to and during work.

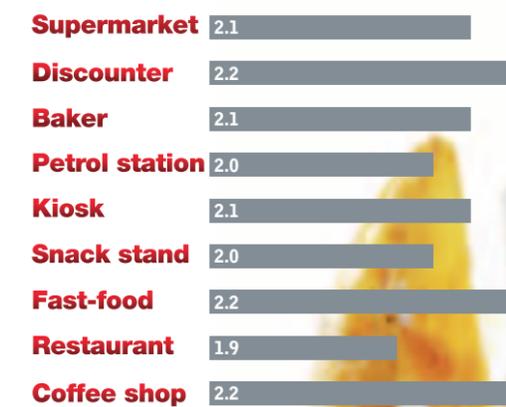
Clean and Quick Valued

Fast-food restaurants particularly score points for speed, accessibility, and cleanliness. Customers value these functional aspects, while the greatest room for improvement, in their opinion, is in value for money.

What is the Fast-Food Restaurant Customer Like?

Customers of fast-food restaurants are less strongly health-conscious, tend to live in the city, and are younger than the average. The number of fast-food customers who do not work in their home town and in part work at varying locations is comparatively high. It may be that customers value fast-food restaurants because they know what to expect in advance. Together with customers of discounters or coffee shops, the fast-food consumer testifies to a high cultural acceptance of on-the-go consumption.

Cultural Acceptance of On-The-Go Consumption



(1 = very low to 5 = very high cultural acceptance)



The Restaurant for Peace and Quiet: Channel of the Sociable

Restaurants traditionally offer food and drink for consumption on the premises. The distinguishing feature of this option: staff serve at the table, which means that restaurants offer the on-the-go consumer a high level of service and are frequently the place to spend a break. Upshot: these products are also typically more expensive.

Good Reasons for Pleasure

Time is needed for a visit to a restaurant while on the go. For this reason, restaurants do not have it easy with the speed, ease, and functionality attributes in on-the-go consumption. In Germany, only just under three percent of respondents choose the restaurant as their top channel. The figures are also not much higher in Austria and Switzerland. The restaurant thus takes last place in the top channel ranking.

Free Time with Freedom

During working hours, people have little time to buy food and drink on the go. This is why restaurants play much more of a role in on-the-go consumption during leisure time — when more than one in four respondents visits one. Both on the way to work and on the way home, only twelve percent of customers perceive restaurants as a source of on-the-go consumption.

At 15 percent, the figure during work is a little higher. One reason for going to a restaurant at lunchtime: with affordable lunch menus, the restaurant can be the supplier for a short time out.

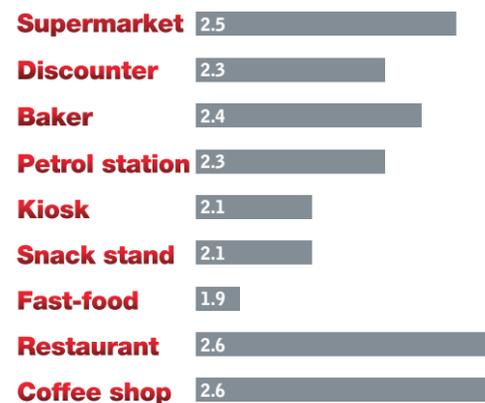
The Key to Success is Value for Money

Restaurants score points amongst regular visitors with their cleanliness and personal touch. The channel thus has the same strong point regarding the personal touch as its smaller relative, the snack stand. Restaurants are evaluated positively with regard to affordability. This result may be surprising, but is understandable: a full meal with drinks in restaurants, together with good quality, can contribute to consumers viewing the service as good value. There is room for improvement in the area of speed.

Healthy Pleasure Desired

Health is an increasingly important subject and is making itself felt on demand in on-the-go consumption. Restaurant customers exhibit the highest degree of health-consciousness, fast-food customers the lowest.

Health-Consciousness



(1 = not at all to 5 = very health-conscious)

Coffee Shop: A Getaway from Everyday Life

Latte macchiato and small snacks: coffee shops place coffee and coffee specialties, as well as sweet foods, at the centre of their product ranges. In addition to traditional cafés, the category of coffee shops includes coffee chain catering. In comparison, they tend to focus on on-the-go consumption.

A Melange Far From Vienna

Some people would go far for a good coffee. This has long been true for Austria and the German-speaking part of Switzerland, but has not always been the case in Germany. Only in recent years have coffee specialties taken Germany by storm. Six percent of customers in Germany choose the coffee shop as their top on-the-go consumption channel. In the country comparison, they are thus most popular in Germany, while the share in Austria and the German-speaking part of Switzerland is smaller.

A Break in Everyday Life: Pleasure in Leisure Time

Coffee shops want to offer consumers something different from their daily routines. The international chains, in particular, try to offer customers the option of some time out with their cosmopolitan flair. This is in demand on the way to and during work, as well

as also in leisure time. In these situations, around one fifth of respondents visit the coffee shop for food and drink to go. The coffee shops score fewer points on the way home, with a lower share of visitors.

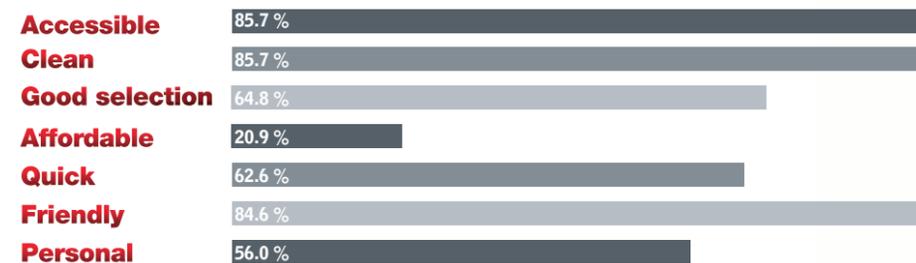
A Personal Atmosphere

Consumers see coffee shops as personal and friendly, even in the case of the chains. All businesses which count as coffee shops can lay claim to the original coffee house culture and, in addition, are characterised as clean. By contrast, their price-competitiveness is considered in need of improvement.

A Getaway from Everyday Life for Young Women

Customers of coffee shops tend to live in the city and are less price-sensitive than the average. They are typically female, on average younger, and work at home or at a fixed place of work.

Percentage of coffee shop visitors who agree with the following attributes



Channel Profiles in On-The-Go Consumption

	Top channel	Situation*	Strengths/Potential	Typical characteristics of customers using the various channels
Supermarket	D 24 %	WTW 68 %	+ accessibility	- young
	A 52 %	DW 62 %	+ selection	- female
	CH 44 %	WH 72 %	+ cleanliness	- unmarried
		LT 62 %	↗ anonymity	
Discounter	D 13 %	WTW 33 %	+ affordability	- female
	A 8 %	DW 29 %	+ accessibility	- price-sensitive
	CH 5 %	WH 42 %	+ speed	- low income
		LT 32 %	↗ anonymity	
Specialty store	D 25 %	WTW 61 %	+ cleanliness	- strongly health-conscious
	A 14 %	DW 55 %	+ accessibility	- female
	CH 13 %	WH 49 %	+ friendliness	- young
		LT 48 %	↗ affordability	
Petrol station	D 6 %	WTW 29 %	+ accessibility	- pressed for time
	A 5 %	DW 25 %	+ speed	- male
	CH 16 %	WH 27 %	+ friendliness	- slightly above-average income
		LT 25 %	↗ affordability	
Kiosk	D 3 %	WTW 19 %	+ personal touch	- on-the-go consumption provides joy
	A 1 %	DW 18 %	+ speed	- not very price-sensitive
	CH 8 %	WH 21 %	+ accessibility	
		LT 17 %	↗ selection	
Snack stand	D 8 %	WTW 20 %	+ personal touch	- not very organised daily routine
	A 4 %	DW 26 %	+ speed	- male
	CH 4 %	WH 22 %	+ friendliness	
		LT 27 %	↗ selection	
Fast-food Restaurant	D 11 %	WTW 25 %	+ speed	- not very health-conscious
	A 9 %	DW 26 %	+ accessibility	- city dwellers
	CH 2 %	WH 30 %	+ cleanliness	- high cultural acceptance of on-the-go consumption
		LT 32 %	↗ anonymity	
Restaurant	D 3 %	WTW 12 %	+ personal touch	- highly health-conscious
	A 5 %	DW 15 %	+ cleanliness	
	CH 4 %	WH 12 %	+ affordability	
		LT 28 %	↗ speed	
Coffee shop	D 6 %	WTW 22 %	+ personal touch	- city dwellers
	A 4 %	DW 20 %	+ friendliness	- not very price-sensitive
	CH 3 %	WH 15 %	+ cleanliness	- female
		LT 20 %	↗ affordability	

* WTW = WAY TO WORK / DW = DURING WORK / WH = WAY HOME / LT = LEISURE TIME

Something On The Go: What Drives Consumers in Europe?

For some, it's part of their daily lifestyle, for others, something for more special moments: on-the-go consumption. The inclination to purchase food and drink while on the go varies amongst consumers.

The latte macchiato, the filled roll, or the chilled Coke: consumers regularly enjoy these products on the go and value the flexibility and the joy in pleasure associated with this – which raises the question: what determines on-the-go consumption behaviour? What are drivers, and what are barriers?

Drivers for Snacks in between are Dependent on Country

Various on-the-go consumption drivers and barriers were identified in the Convenience Study 2008. Alongside time pressure, joy and flexibility primarily determine the inclination for on-the-go consumption. In the Convenience Study 2009, more attention was paid to these drivers, also against the backdrop of cultural differences in the separate countries.

Top Driver Joy?

As in 2008, joy in on-the-go consumption remains the top driver in consumption behaviour. The less joy German consumers have in eating and drinking on the go, the less likely they will frequently do so. To a certain extent, this is also true of the Swiss, for whom joy in on-the-go consumption is one of its top three determinants, albeit behind the driver of time pressure. Although joy has an effect on the inclination for on-the-go consumption in Austria, it is only a weak influence. Joy is not one of the top drivers there.

The Changing Face of Flexibility

In 2008, perceived flexibility was additionally at the very top of the list of influences. Here, it is also true

that perceived flexibility influences whether the range of convenience and on-the-go products are used. In 2009, however, this influence has diminished in comparison with last year. It may be that the global crisis has pushed this perceived flexibility to the lower end of the table. Another explanatory approach sees the growing familiarity of the consumer with the constantly increasing and universally available range of products for on-the-go consumption.

Time is not Only of the Essence in Germany

Time pressures are repeatedly posited as the primary motive for on-the-go consumption. It is certainly true that consumers buy food and drink away from home when they do not have time to cook. However, this motive neglects the fact that there are many people who enjoy on-the-go consumption and find pleasure in it. Pressure of time is nevertheless a common motive for buying coffee and snacks on the go in Germany, Austria, and Switzerland. In Switzerland, a perceived lack of time is the number one reason, in Austria and Germany the number two.

Good Scores for the Quality of On-The-Go Consumption

It initially seems incredible that quality only exerts a weak influence on the inclination for on-the-go consumption. However, closer examination is required here. In a specific shopping situation, it is normal that product quality has an influence on the purchasing behaviour of a consumer. However, in contrast to the situation around 20 years ago, consumers take high

product quality for granted. Germans, the Swiss, and Austrians assess the quality of goods on offer as similarly good. But how does this perceived quality affect actual consumption behaviour on the go? The results show that the impact is small. Consumers are evidently sure of finding something to meet their expectations at their usual or a new supplier.

Cultural Acceptance Does Not Make the Difference

The 2008 study suggested that some consumers have cultural reservations regarding on-the-go consumption. Eating and drinking on the go is evidently not accepted in all population and age groups. The present study reveals the necessity of differentiating between cultural acceptance of on-the-go consumption in a country and the social acceptance of convenience options amongst family and friends. What is and is not culturally accepted in their respective home country evidently makes little difference to the majority of

consumers. A lack of cultural acceptance of on-the-go consumption does not influence consumers' respective inclinations in Germany or Austria. Cultural norms are only important, to a small degree, in Switzerland, where the opinion of the general public influences the behaviour of the individual consumer.

Social Acceptance: Family and Friends Provide Orientation

What is usual in their actual social environment appears to be more important to the individual. In Austria, for example, family and friends' consumption habits are the crucial factor in the inclination for on-the-go consumption. This is also confirmed by a further fact: sociability while eating rates particularly highly in Austria. However, social acceptance is also important in Germany and Switzerland. In both countries, it is the number three driver after joy and time pressure.

Where Things Break Down: Barriers to On-The-Go Consumption

The drivers named above promote the inclination for on-the-go consumption. However, there are some factors which inhibit the inclination for on-the-go consumption. These are termed barriers. In this regard, relevant scholarly literature was consulted and external studies analysed.

Price-Sensitive Customers also Buy while On The Go

There is a commonly held opinion that on-the-go consumption is more expensive than eating and drinking at home. Whether this is true or not has no influence on the consumption behaviour of the individual, for whom personal perception is the only thing that counts. The assumption that highly price-sensitive customers are less inclined to buy food and drink to go than those who count every penny is false. Only in Germany, the land of savers and discounters, is price sensitivity a weak barrier to the inclination for on-the-go consumption. In Austria and Switzerland, consumers' price sensitivity has no influence at all on whether or not people buy food and drinks on the go.

Healthy and On-The-Go are a Good Match

Convenience products formerly had the common reputation of being less healthy than self-made food and drinks. Consumers consider this old prejudice as outdated. Consumers who are not particularly health-conscious have no more and no less an inclination for on-the-go consumption than those for whom health is very important.

"The times in which you were dependent on really unhealthy food at motorway services are also past. Now, you have a good choice."

Female consumer, 37, Germany

A regular daily routine is only a light barrier to on-the-go consumption in Germany and Switzerland. Consumers who experience joy in on-the-go consumption can manage these circumstances, irrespective of how ordered their daily routines are.

Joy Counts for Men — Flexibility for Women

When considering the drivers and barriers by gender, interesting differences are revealed. Time pressure and joy in on-the-go consumption are stronger drivers for eating and drinking on the go amongst men than women. Amongst female respondents, a possible gain in flexibility has a stronger effect on the inclination for on-the-go consumption. In addition, cultural acceptance has a greater effect on the behaviour of women than men. The comparison by gender makes it clear that no influence is discernible in the male group, while at least a weak influence is present amongst women.

On-The-Go Consumption: Drivers and Barriers

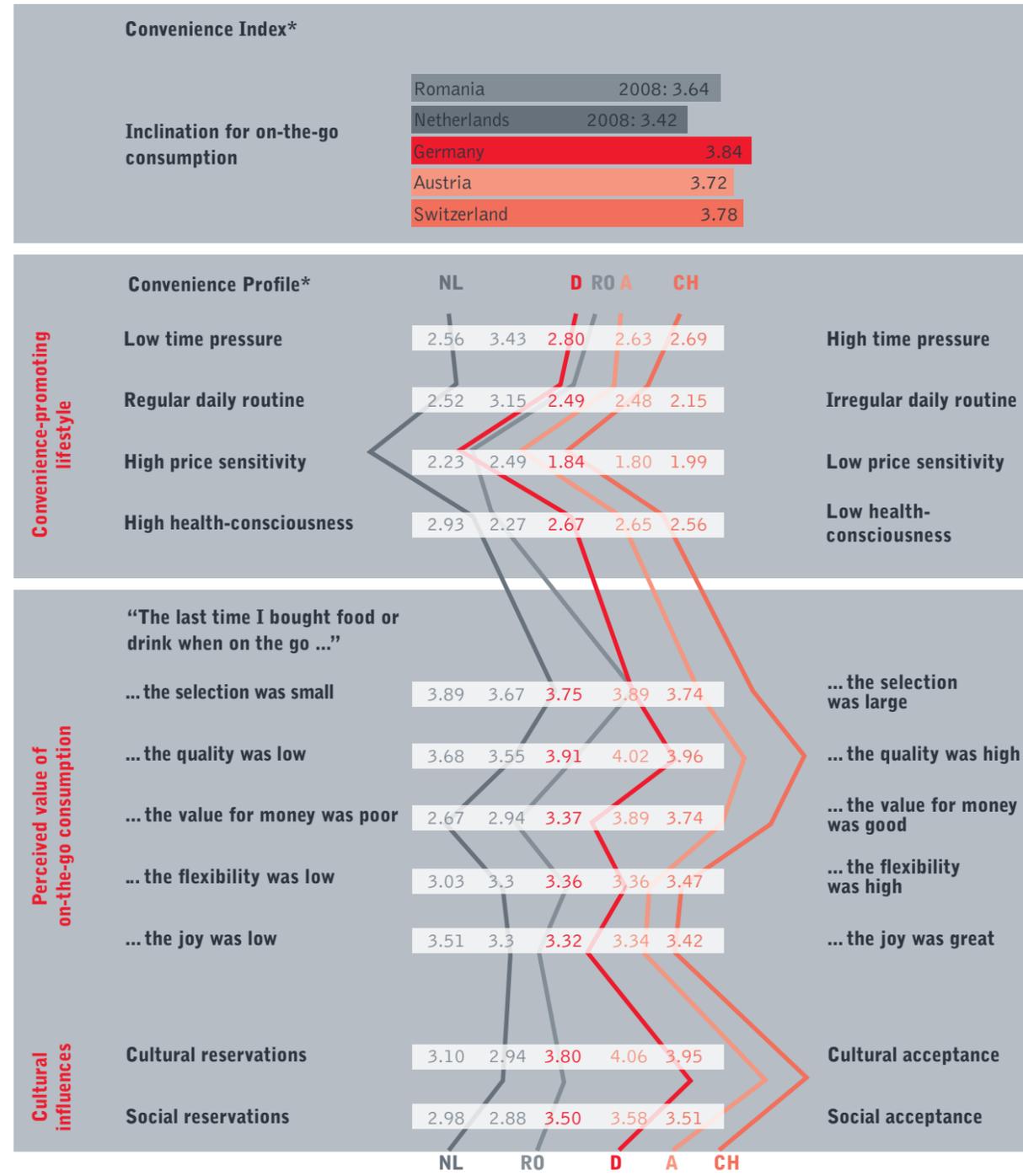
	Germany	Austria	Switzerland
Drivers	Joy in on-the-go consumption	1st driver	2nd driver
	Perceived flexibility	weak	weak
	Time pressure	2nd driver	2nd driver
	Perceived quality	-	weak
	Social acceptance	3rd driver	1st driver
Barriers	Lack of cultural acceptance	-	weak
	Price sensitivity	weak	-
	Health-conscious	-	-
	Regular daily routine	weak	weak

Influence on the inclination for on-the-go consumption

On-The-Go Consumption: Drivers and Barriers

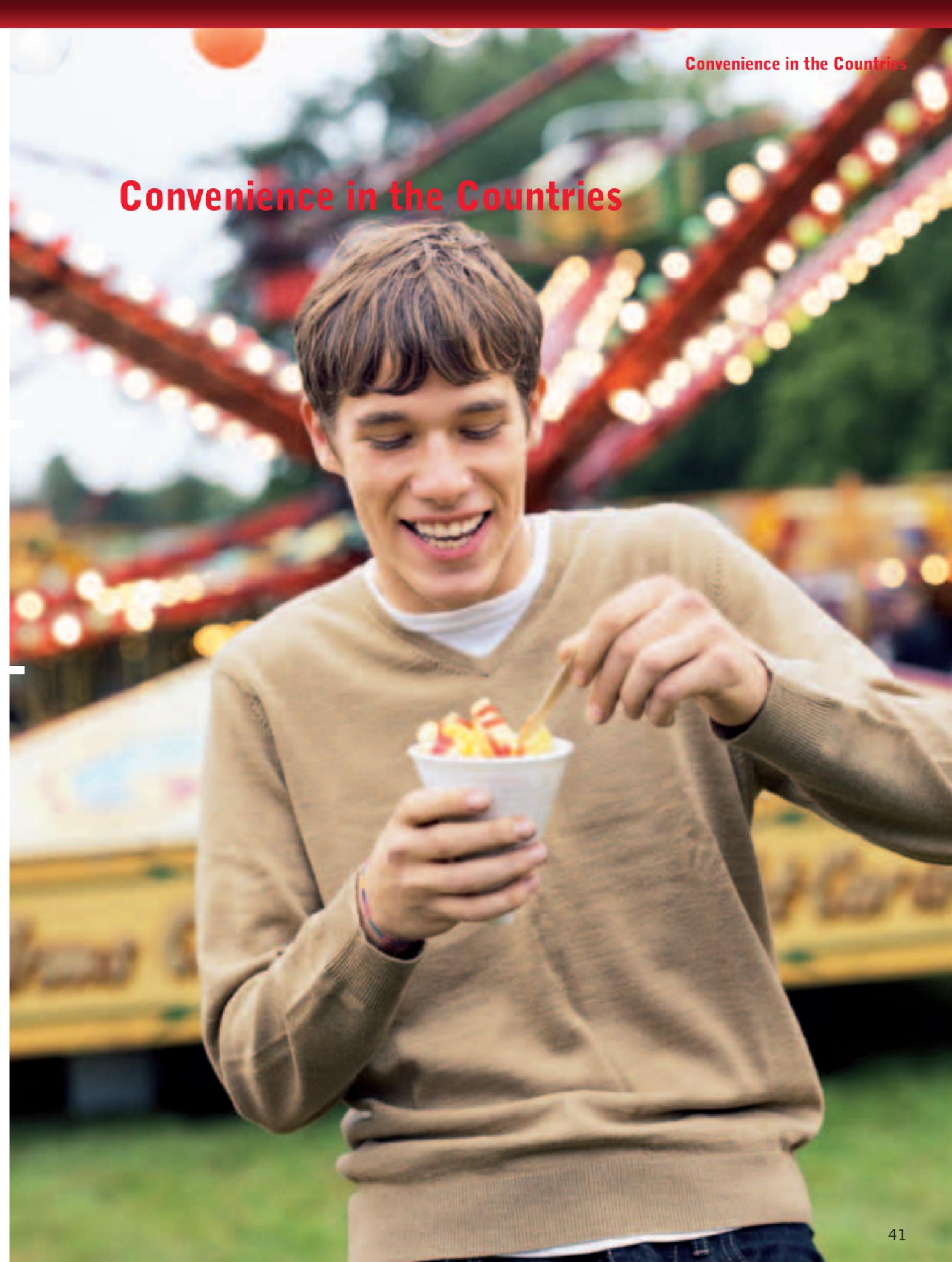
- In Germany, Austria, and Switzerland, time pressure is a central driver of eating and drinking on the go. In Germany, joy in doing so additionally plays an important role.
- In Germany, Austria, and Switzerland, the social acceptance of purchasing on the go is important. Cultural barriers barely play any role.
- For men, time pressure and joy are drivers of on-the-go consumption; a possible gain in flexibility is more important to women.

The Countries in Comparison



* The various determinants were generated with the help of several questions. The scale ranges from 1 ("completely agree") to 5 ("completely disagree").

Convenience in the Countries



Germany: Moments of Pleasure

From Flensburg to Freiburg

German consumers happily take up the numerous opportunities to buy food and drink to go. Almost nine out of ten consumers say they make use of the available options in a range of situations on the go. Last year's Convenience Index already demonstrated that the Germans' inclination for convenience is high, with Germany heading the table ahead of the Netherlands and Romania. This year, too, the Germans push the comparison countries of Switzerland and Austria into second and third place.

Joy is King

But what makes people in Germany buy products for immediate consumption while on the go? Joy in doing so – the number one driver in Germany. The more joy people experience in putting in a brief food or drink stop on the move, the greater the possibility that they will actually do so. As a consequence of the growing product range and the opportunity to buy what is desired at almost any time of day while out, on-the-go consumption in Germany is also perceived as a gain in flexibility. Whether it's the coffee to go on a tiring weekend shop, the ice-cold refreshing drink while on a long car journey on a hot Sunday, or a curried sausage as a welcome alternative to everyday canteen food, convenience creates joy, and the Germans are fully aware of this.

Germans Like it Pragmatic

Nevertheless, the Germans have a pronounced pragmatic side, which partly explains the inclination for quick and easy consumption on the go. A large

number of German respondents find satisfying their hunger on the go – and this quickly and easily – important. The time pressure felt by the Germans is correspondingly great – the number two motive for on-the-go consumption.

The German and his Specialty Store

The majority of German consumers use bakers and butchers as their top channel. Customers in Germany want to be assisted competently and expertly. In general, the specialty stores are praised for their high levels of cleanliness and easy accessibility, as well as for their friendliness in the sales transaction. In addition, Germans particularly enjoy consuming the products directly in the place of purchase. It may be the fact that specialty stores are increasingly offering seating and stand-up areas which makes the small but important difference, as compared with the supermarket, specialty stores in Germany pull just ahead on the popularity scale. The supermarket primarily scores points with its large product range and, recently, its increasing range of ready-to-eat products.

Practical Products for Purpose Eaters

The Germans' preferences are also reflected in their choice of channel. Even though the discounter, fast-food restaurant, and snack stand were not elected to the highest position on the list of top channels, a strong preference for these channels can nevertheless be discerned. In general, they impress with their speed and ease, as well as their affordability in the case of the discounter. To that extent, Germany does full justice to its reputation as a land of savers

and discounters: only in Germany is price-sensitivity a slight barrier to the inclination for on-the-go consumption.

Dolce Vita in the Federal Republic

However, the study brought to light a further preference in Germany. Regardless of the situation, hot drinks are consumed more in Germany than elsewhere. The bakers so beloved by the Germans, as well as petrol stations and, more recently, the greatly increasing number of coffee shops offer them many opportunities to indulge themselves. In general, coffee shops particularly score points with their personal and friendly atmosphere and cleanliness, while specialty stores and petrol stations are popular for their speed and accessibility. In the area of value for money, the Germans see room for improvement in all three channels. However, customers will not be deterred from their enjoyment of coffee specialties or sweet and savoury snacks.

No Halfway Measures in Germany

Distinctions must be made regarding consumption habits in Germany. On the one hand, there are large numbers in the Federal Republic who, irrespective of on the way to work or the way home, at the work desk, or in leisure time, never buy products for immediate consumption while on the go. At the same time, the number of people who very frequently consume in a range of situations is greater than in other countries. The Germans thus prove themselves to be consistent. As far as on-the-go consumption is concerned, it's all or nothing.

Country Profile: Germany

- Joy in on-the-go consumption is the number one driver in Germany.
- Bakers and butchers are the top channel for the majority of German consumers.
- Only in Germany is price-sensitivity a slight barrier to the inclination for on-the-go consumption.



Austria: Cosiness at Home

Mornings and Evenings: At Home

The largest share of Social Eaters is found in Austria. Amongst Austrians, a propensity for pleasure and sociability can be seen not only in leisure time but by all means also on working days. This preference often appears to be at odds with on-the-go consumption. As an example, Austrians exhibit the lowest cultural acceptance of on-the-go consumption. Respondents say it is usual to eat at home in the mornings and evenings in Austria. And the Austrians indeed do so more often than others. On-the-go consumption appears not to fit the picture particularly when it concerns something quick in passing.

My Clique and I

The low level of cultural acceptance of on-the-go consumption amongst the Austrians is, however, compensated by friends. When friends buy food and drink on the go, this also has a strong effect on the individual. This social acceptance of on-the-go consumption is the main driver of eating and drinking while out in Austria. While the Swiss are driven by time pressure and the Germans by joy, the factors in Austria are family, friends, and acquaintances. This may be the reason why Austrians buy food and drink on the go more often in leisure time than on working days. The penchant for buying chilled alcoholic drinks at the weekend equally underscores the sociability aspect in on-the-go consumption.

If At All, Then Sweet

Cultural barriers explain why, for example, the inclination for a regular on-the-go consumption stop is lowest in Austria compared with the other countries. When the Austrians do buy something on the way to work, they enjoy something sweet comparatively more often. The propensity for pleasure and sociability also shows through in the form of consumption. When an Austrian buys something while out, the product is frequently consumed somewhere else. While Germans and some Austrians like to consume directly in the place of purchase, the Swiss enjoy eating and drinking at their work desk or on public transport. In addition, the Austrians also like eating and drinking in the car.

Austrians Enjoy Helping Themselves

Austrians barely ever choose channels which invite a quick stop, such as the snack stand or the coffee shop. The self-service formats do better here in providing food and drink for on the go. A little over half of Austrians choose the supermarket as their top channel and more than three quarters of consumers regularly use the supermarket for their on-the-go consumption. There are reasons for this: if the assessments of the Austrians and Germans with regard to the supermarket are compared, the Austrian supermarkets fare far better. This is true for the selection, value for money, accessibility, cleanliness, friendliness, and speed. Supermarkets are seen even more positively in Switzerland, against which Austrian supermarkets can only hold their own in the areas of friendliness and accessibility.

The Kick During the Week

The supermarket as the top source of on-the-go consumption, the urge to go home, and the determination to enjoy despite this have an impact on the most popular products in Austria. While filled rolls cover the way home on European average, particularly many Austrians buy salad, although they are not much more health-conscious than consumers in neighbouring countries. These differences may also be the result of the available product range at Austria's popular supermarkets. Evidently, the appetising appearance and freshness of the range score points here. During work, one quarter of Austrians get a kick from an energy drink.

Stay? No Thanks — It's Better at Home

The Austrians appear to choose channels and products which can be consumed within the four walls at home. The restaurant is also regularly visited by a third of consumers for food and drink while out. As a result, the restaurant in Austria is comparatively popular in the country comparison. The many Austrians who buy food and drink from the baker and butcher on the go are also suggestive of the cultural barriers to on-the-go consumption. In Austria, too, more tradition is attributed to specialty stores than many another channel. The specialty store in Austria may not be even close to as popular as in Germany, but is still called on regularly by over half of the Austrians for on-the-go consumption.

Country Profile: Austria

- When friends eat and drink on the go in Austria, this has a strong effect on the individual.
- In the country comparison, Austrians tend to indulge in something sweet.
- Austrians wait until arriving at their place of work or home before consuming their purchased products.
- Channels with self-service score points in Austria.



Switzerland: Health Has Its Price

A Healthy Variety of Products

The Swiss do not just live between cultures geographically but also with regard to on-the-go consumption. An Italian cappuccino, a French croissant, or diced fruit to go? Swiss people have the choice. The range of on-the-go products in Switzerland has a reputation for being innovative and of very high quality. Although respondents do not consider the range in their own country to be significantly more innovative than their neighbours, in the country comparison the Swiss perceive the products in Switzerland as more healthy.

Seduced by Joy

Irrespective of Swiss people's perception of the various options, consumers experience joy in on-the-go consumption. Joy takes second place amongst the drivers for convenience products in Switzerland, which, however, are headed by time pressure. In addition to this aspect, the social acceptance of on-the-go consumption amongst friends and acquaintances influences whether Swiss people do or do not buy food and drink while on the move. Customers in Switzerland evidently pay attention to what people in their social environment think about on-the-go consumption.

Lunch is Most Important

In Switzerland, lunch forms the centrepiece of a typical day, structuring the course of the day in Swiss life. The majority of people in this country prefer consuming food and drinks in the middle of the day. They contrast with a very small share who favour a substantial breakfast in the morning. Breakfast is

not so important to the Swiss. In the mornings, they consume chilled refreshing drinks and hot drinks in addition to energy drinks to fortify themselves for the day ahead.

The Swiss are Health-Conscious

Although the tendency towards health-consciousness in Switzerland varies little from the situation in neighbouring Germany and Austria, fruit and fresh salad make a showing on Swiss plates again and again, irrespective of the time of day. This way of life has consequences: the Swiss have a significantly lower Body Mass Index than the Germans. Channels which serve on-the-go consumption have also adapted to this lifestyle. It is therefore not surprising that, of all the countries, the Swiss assess the product range as most healthy. This lifestyle can also be seen in the comparatively low preference for fast-food chains. And this despite the fact that these suppliers have adapted their menus accordingly and now also offer fresh food and salads in addition to burgers and the like.

Quality has its Price

A wide range of fresh products are offered and also consumed on the go in Switzerland. The Swiss know that quality has its price and pay the extra for the range of fresh products. In country comparison, the Swiss nevertheless assess on-the-go consumption products as the cheapest, and this despite the widely-known higher price levels in Switzerland.

The Swiss Consume Less on the Premises

Compared with the other countries in the study, Germany and Austria, the Swiss more rarely consume purchased food and drink on the spot. Swiss people tend rather to consume on public transport and at their work desks than directly in the place of purchase. This may have to do with the fact that the Swiss prefer to use self-service channels and buy products which cannot always and need not necessarily be consumed immediately.

Petrol Station Present and In Demand

The Swiss list of most-visited channels in on-the-go consumption is headed by the supermarkets. The number of visitors per station may be lower, but the petrol station still occupies second position in Switzerland's top channel ranking. Petrol stations are present everywhere and easily accessible, as their numbers in Switzerland are comparatively high. The fact that they are popular for on-the-go consumption is all the more significant, since relatively many self-service petrol stations in Switzerland do not have any kind of shop. The other petrol stations appear to capture the Swiss preferences perfectly. Almost 50 percent of people regularly buy food and drink to go at the petrol station, nine percent of respondents name the petrol station as their top channel. Discounters, found at less regular intervals than in the other countries as a consequence of later entry to the market, are called on relatively little.

Country Profile: Switzerland

- The Swiss find the range of on-the-go consumption products more healthy in the country comparison.
- In Switzerland, lunch forms the centrepiece of a typical day.
- When consuming on the go, the Swiss have an inclination for healthy products.
- In Switzerland, petrol stations occupy second position in the top channel ranking.



Background Information and Methodology

Protagonists

The present study was carried out on behalf of Lekkerland AG & Co. KG and in close cooperation with its Corporate Communications department.

The study was directed and carried out by Prof. Dr. Sabine Möller, holder of the Lekkerland Endowed Chair for Convenience & Marketing and Director of the Competence Center for Convenience at the European Business School (EBS). The following persons were involved in preparing the study: Dipl.-Kffr. Tabea Huneke, research assistant and doctoral candidate at the Lekkerland Endowed Chair for Convenience & Marketing, and Dipl.-Kfm. Raphael Heider, international trainee at Lekkerland AG & Co. KG and external doctoral candidate at the Lekkerland Endowed Chair for Convenience & Marketing.

In addition, a series of partners contributed to the success of the study. The large-scale consumer survey in Germany, Austria, and Switzerland was conducted by Research Now, the international online panel specialists.

Elements and Approach of the Study Survey

The heart of the study is formed by a large-scale consumer survey structured on the basis of a standardised questionnaire. This questionnaire was developed on the basis of scholarly literature and the qualitative preliminary study of the 2008 Convenience Study, and tested for coherence by a range of people on several occasions.

The questionnaire contains five sections. General questions on **eating habits** were asked in the first section. Respondents were asked, for example, which mealtime is the most important on normal working days or on days off, how frequently consumers buy food and drink on the go, and which attributes are

most important at these mealtimes (for example sociability, speed, or satisfying hunger). These questions form the basis of the consumer types: Early Eater, Midday Muncher, Late Gourmet (working days), and Social Eaters and Purpose Eaters (days off).

The second section is devoted to **product preferences**, in which the specific situations of food consumption were taken into account. As the focus of the study is on-the-go consumption, a range of products for consumption while on the move were polled separately according to whether they featured on the way to work, during work, on the way home, and on free days. The poll distinguished between food and drink, and consumers were given a choice of existing categories to minimise the length of the survey and demonstrate a wide spectrum of products. The following food categories were available: filled roll/sandwich, ready-meal for heating, warm savoury snack (for example bockwurst/pizza), cold savoury snack (for example salami snack, meatball), crisps/crackers, salad, fruit or fruit salad, yoghurt or the like, chocolate bar or sweets, cake or sweet biscuits, ice cream, other. The following drink categories were available: something hot to drink (for example coffee or tea), chilled refreshing drink (for example water, juice, lemonade), non-chilled refreshing drink (for example water, juice, lemonade), milk-based drinks (for example drinking yoghurt), chilled alcoholic drink (for example beer, wine), non-chilled alcoholic drink (for example beer, wine), other. In addition, respondents were asked, for example, where these purchased products were consumed, whether immediately in the place of purchase or later, and how the products on offer are perceived.

The third section in the questionnaire focuses on **choice and perception of channel**. Here too, the

specific situations in the choice of channel in on-the-go consumption were noted. Respondents were therefore asked which channels they had visited most frequently in the preceding four weeks on the way to work, during work, on the way home, and on free days. To obtain a differentiated picture, not only the most-frequently but also the second-most and third-most frequently used channels were polled. On this basis, regular customers were identified who visited one channel, which is therefore necessarily in the provider selection set, at least once in these four weeks. Loyal fans or so-called top channel customers who most frequently visit one specific channel irrespective of situation or frequency were also identified. Furthermore, this top channel was evaluated by channel perception with the term pairs anonymous/personal, friendly/unfriendly, quick/slow, affordable/expensive, good selection/poor selection, clean/dirty, and easily accessible/poorly accessible.

The fourth section of the questionnaire is devoted to the so-called determinants, which means **drivers and barriers** in on-the-go consumption. On the basis of last year's study and an analysis of the literature, a regression model was designed and executed to explain the determinants of an inclination for on-the-go consumption. Here, the inclination for on-the-go consumption presents the dependent variable. The individual variables, such as inclination for on-the-go consumption or time pressure, were each measured through several questions. Tests on the validity and reliability of the measurements meet typical quality criteria.

In the fifth section of the questionnaire, socio-demographic variables such as age, gender, place of residence, employment status, and commuting behaviour, were polled.

According to the content, the questions were measured on a range of **scales**. Questions which ask the significance of various aspects were measured on rating scales in which the respondents ranked aspects such as

satisfying hunger, sociability, and speed in order of importance. The questions evaluating the product range and the channels were measured on bipolar five-point scales which were verbally anchored, i.e. expensive versus cheap. The questions on the determinants of on-the-go consumption were measured on a five-point Likert scale, anchored at 1 (totally disagree) and 5 (totally agree). To increase legibility, the 5-point scales were condensed into three-point scales in many places.

The **universe** of the survey was formed by all consumers of 16 years and above in Germany, Austria, and the German-speaking part of Switzerland. The sample was compiled representative of the population with regard to age, sex, and employment status. The survey was carried out in all three countries via online panel. The sample comprised 1,000 Germans, 600 Austrians, and 600 Swiss people.

The results of bivariate and multivariate **statistical methods** reported in the study are significant at a level of at least five percent. Variance analysis and regression analysis were used in particular. On the basis of a confirmatory factor analysis, the attribution of items to the individual factors was also reviewed; items with too low factor loading were eliminated.

Glossary

Barriers to On-The-Go Consumption: aspects such as price sensitivity identified in the study as negative determinants of on-the-go consumption.

Convenience: the extent to which consumers feel that time and effort is saved in shopping and consumption processes. In the study, the term convenience refers to on-the-go consumption with something to eat or drink.

Convenience Index: the extent of consumers' current and future inclination for on-the-go consumption with food and drink.

Cultural Reservations/Lack of Cultural Acceptance of On-The-Go Consumption: extent to which it is generally typical for citizens in one culture to eat at home rather than eating on the go in the mornings, at midday, and in the evening.

Customers, Regular: consumers who regularly visit one channel, i.e. most frequently, second-most frequently, or third-most frequently, and this either on the way to work, during working hours, on the way home, or in leisure time.

Drivers of On-The-Go Consumption: aspects like time pressure or joy in on-the-go consumption which were identified in the study as positive determinants of on-the-go consumption.

Early Eaters: consumers who on working days identify breakfast as their most important mealtime.

Flexibility Through On-The-Go Consumption: the degree of freedom and mobility consumers perceive as a result of the possibility of on-the-go consumption.

Health-Consciousness: extent to which consumers pay attention to ingredients when buying food to go or to which food purchased while on the go is healthy.

Inclination for On-The-Go Consumption: see Convenience Index.

Joy in On-The-Go Consumption: extent to which consumers find pleasure in on-the-go consumption.

Late Gourmets: consumers who on working days identify dinner as their most important mealtime.

Loyal Fans: customers of the top channel in contrast to regular customers.

Midday Munchers: consumers who on working days identify lunch as their most important mealtime.

Perceived Quality: extent to which the most recently purchased convenience products came up to consumers' expectations, were qualitatively good, or were tasty.

Price Sensitivity: extent to which prices are taken into consideration, concomitant of the fact that consumers also compare prices on smaller items or know the prices of regularly purchased services.

Purpose Eaters: consumers for whom satisfying hunger, speed, and ease are most important when eating and drinking on days off. Sociability and pleasure are less important to these consumers.

Regular Daily Routine: extent to which consumers have regular working hours and lunch breaks.

Savoury Snack, Cold: this is one of the set product choice categories. Examples provided to respondents were a BiFi (Peperami) or meatballs.

Savoury Snack, Warm: this is one of the set product choice categories. Examples provided to respondents were a bockwurst or a pizza.

Social Acceptance of On-The-Go Consumption: extent to which purchasing and consuming food and drink on the go is typical amongst the friends and acquaintances of the respondent.

Social Eaters: consumers for whom sociability and pleasure are most important when eating and drinking on days off. Satisfying hunger, speed, and ease are less important to these consumers.

Time Pressure: the subjective feeling of having too little time for certain activities like food shopping or eating and drinking.

Top Channel: the channel named most frequently by consumers regardless of situation (on the way to work, during working hours, on the way home, or in leisure time) and frequency (most frequent, second-most frequent, or third-most frequent).

Value for Money: perception of the relationship between sacrifice in the form of price and the expected service, and thus the fairness or adequateness of a product's price (product purchase).

Credits

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