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Management Report
Germany
lays the table



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Management Report

Germany lays the table –

A study of eating habits and refined dining



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About Messe Frankfurt

Messe Frankfurt is Germany's leading trade fair organiser, with 538* million euros in sales and 1,891* active employees worldwide. The Messe Frankfurt Group has a global network of 28 subsidiaries and approx. 50 international Sales Partners, giving it a presence for its customers in more than 150 countries. Events "made by Messe Frankfurt" take place at more than 30 locations around the globe. In 2012, Messe Frankfurt organised 109* trade fairs, of which more than half took place outside Germany.

Messe Frankfurt's exhibition grounds, featuring 578,000 square metres, are currently home to ten exhibition halls and an adjacent Congress Center. The company is publicly owned, with the City of Frankfurt holding 60 percent and the State of Hesse 40 percent.

For more information, please visit our website at: www.messefrankfurt.com

* Preliminary numbers (2012)

Introduction

The morning trip to work, past bakeries, snack-bars or the branches of fast food chains gives an impression of eating habits in Germany that are characterised by haste and mobility: eating is apparently becoming merely a form of food intake, subordinated to work, e-mails and texts.

A high level of mobility is required and desired. But what effect does this actually have on eating habits? Where do the Germans prefer most of all to eat and do they still actually lay the table to do this? We followed up these questions.

The result of the current survey of eating habits and the cultivation of the art of dining in Germany, which was commissioned by Messe Frankfurt, is more gratifying for the branches of business involved than we might suppose if we examine what the media often have to say about this topic.

We have found that, in general, the Germans still prefer to eat at home! Just how important the midday meal is today, can be seen at the weekend, when the external factors of everyday working life can be ruled out.

And the nation of poets and philosophers also has a culture to keep up: The culture of the well-laid table! The willingness to lay the table to enjoy a meal together and

“Cultivated dining at table still has a very important role to play in our society. This benefits manufacturers and traders alike: some 80 percent of Germans buy products relating to the well-laid table exclusively from the specialist trade and department store.”



to invest in fine crockery, cutlery or glassware, is one further pleasing result of this study. Two thirds of those surveyed set the table regularly for all three meals at the weekend.

When it comes to the elements involved in the well-laid table, the Germans prefer the classical approach: fine tableware and glassware are part of

this, as are table linen and accessories. This does not mean that there is preference for a certain style. People are open to new approaches and ideas, as is shown, on the one hand, in the statement made by a quarter of those surveyed, who purchased a new dinner service in the last five years, and, on the other hand, in the interest shown in ideas from presentations by the trade or in newspapers and magazines.

A further positive result is that the preferred point of purchase is the specialist shop and the department store. Thus, the cultivation of fine dining is also stimulating cultivation of purchasing habits that go with it.

The following pages provide you with the details of the study. You will see that the industry by no means needs to lose its appetite. We hope you have an interesting read.

A handwritten signature in black ink, appearing to be 'S. Kurzawski', written in a cursive style.

Stephan Kurzawski
Senior Vice President, Messe Frankfurt Exhibition GmbH

Executive summary

People eat at home

In Germany, the large majority of people eat at home: this is where 98 percent of those surveyed have their evening meal. Many people also have their lunch at home: 62 percent of those surveyed have their midday meal within their own four walls. And even with those who are employed, it is still 41 percent.

People eat at midday

For the Germans, the main meal is the midday meal, as is confirmed by almost half of those surveyed for the period Monday to Friday (47 percent). At the weekend, it is even clearer: almost two thirds of those surveyed (63 percent) have their main meal at midday.

The data provided by this study do not support the assumptions repeatedly quoted in the media that everyday life is becoming fragmented and fast-food consumption is on the rise.

Eating is a family occasion

At midday, at home and with the family: more than a half of those surveyed prefer most of all to take their meals together as a family. For 34 percent it is the spouse or partner who is the preferred companion at the table.

People lay the table when they have a meal

Two thirds of all Germans lay the table for every meal at the weekend. So if time permits, meals are enjoyed in a cultivated atmosphere. In the week, this applies to the evening meal for almost the same high number, revealing the influence of working life.

The high frequency with which the table is regularly laid in German households and people eat as a family reveals the social importance of tableware. Another argument in favour of this is the fact that for 86 percent of those surveyed, fine porcelain or tableware is part of the perfectly laid table.

People buy in specialist shops

Classical eating habits are paralleled by the places where dishware is bought. Three quarters of those surveyed buy items of tableware in specialist shops and department stores. The percentage share of specialist stores, such as discounters, chain stores and furniture stores as a point of purchase is low, and that of the internet trade is marginal, at one percent. Last year, the market volume was around €6 billion; in 2012, every German household spent on average a sum of €141.60 on well-laid table products and household requisites (Source: IFH Retail Consultants).



The survey

The investigation was carried out by the GfK Consumer Research Association [Gesellschaft für Konsumforschung] by means of personal interviews in the homes of those surveyed. The 974 persons surveyed are representative of the German resident population including non-Germans from the EU aged 14 and upwards. The study is thus representative.

The aim of the investigation was to establish concrete facts about eating-at-table habits starting with the question of when, where and with whom people eat. The questionnaire thus provides a picture of just how significant eating and eating habits are at home, and the influence exerted by factors such as family status, age, household income and occupation. It is also possible to ascertain the target groups that are keen on good table manners as well as stylish decorations and table settings.

The survey used three income brackets as its basis: the low income bracket with a monthly net household income of up to €1,499, the middle income bracket with a monthly net household income of €1,500 to €2,999. Households with an income of €3,000 and upwards are included in the group "High-income households".

When do people eat in Germany?

The preference is for the midday meal

In a society that is marked by professional activity, stress and flexibility, the midday meal certainly dominates. This is definitely the case at the weekend; but also from Monday to Friday the midday meal is the main meal for the Germans, slightly ahead of the evening meal.

47 percent of all those surveyed give the midday meal as being their main meal. There are various preferences depending on income bracket. Whereas 53 percent of low-income households state that their main meal is the midday meal, it is only 40 percent for households with a high income.

Age, and the presence of children, are factors that play a distinctive role when it comes to the main meal in the week. Those surveyed who were aged 50 or more, whether married or single, show a definite preference for the midday meal as the main meal. This is also the case with single parents and – somewhat less markedly – with married couples/partners living together aged between 30 and 49, with children. The last mentioned group say that the midday meal is their main meal almost twice as frequently as the reference group without children.

On Mondays to Fridays, the evening meal is the main meal for 45 percent of those surveyed. For more than half the men surveyed, the evening meal has this status, whereas with women it is only less than 40 percent. Here too, there are preferences depending on the income brackets: for 55 percent of high-income households, the evening meal is the most important meal of the day. For low-income households, this is only the case with 37 percent.

In the week, breakfast as the main meal plays a subordinate role. Less than ten percent of those questioned give breakfast as being the main meal from Monday to Friday.

At the weekend, the midday meal is the main meal for almost two thirds of all those surveyed. In the group of married couples/partners living together between the age of 30 and 49 years, without any children, the preference for the midday meal is astonishingly clear. In this case, 71 percent said their main meal was the evening meal during the week, whereas at the weekend, this value plummets to 17 percent. The effect of the time factor on preferences can scarcely be more obvious. The time available for the preferred midday meal is simply not available or, if so, only to a limited extent.

Also a larger number of those surveyed take the old adage “to breakfast like a king” to heart at the weekend. As the main meal during the free days of the week, breakfast clearly exceeds the ten-percent mark, with 15 percent.

It is mainly families with children and in high income brackets that like to breakfast together. In the group of married couples/partners living together between the age of 30 and 49 years, with children, 20 percent of those surveyed give breakfast as their main meal at the weekend. Here, breakfast even ranks higher than the evening meal.



Regional differences also prove interesting in the response to the question about the main meal at the weekend. At 26 percent, the evening meal as the main meal in the old federal German states (i.e. the former West Germany) is substantially higher than in the new federal German states (i.e. the former East Germany). Here, only just on eight percent prefer this time for a meal.

Differences can also be seen in the midday meal: 81 percent of those surveyed in the new federal states give this as their main meal, whereas in the old federal states it is only 59 percent. The reasons for this can be assumed to lie in the age structure and in the comparatively large number of households with a low net income in the new federal states.



Where do people eat in Germany?

At home, if possible

Although this result was to be expected, the specific figures are worthy of note: a total of 62 percent of Germans mainly have their midday meal at home. What is surprising, however, is that 41 percent of the working population also have their midday meal at home from Monday to Friday. Presumably, these figures are strongly influenced by factors such as self-employment and proximity to the place of employment. In the case of those surveyed who were not employed, 90 percent have their midday meal at home, as was to be expected.

Significant correlations can be observed between age on the one hand and net household income on the other – the older those surveyed are, the more frequently they eat at home. Where net income per household is concerned, the pattern is as follows: the higher the income, the lower the proportion of those who have their midday meal at home. These correlations are not observable in the case of the evening meal. Here, the number of those surveyed in almost all sub-groups that mainly eat at home is far more than 90 percent.

When it comes to midday meals away from home, being employed is an important factor. 78 percent of those interviewed who have a job and who state that they mainly eat away from home at midday, give the company canteen or the actual place of work as the place where they mainly eat. Take-away snacks and fast food are not a determining factor. Only 16 percent of those who have a job give these as the preferred form of midday meal. In no group is this value significantly higher than 20 percent, not even in the younger 14-to-29 age group.

Further findings:

Married couples/partners, 30 to 49 years with children, eat at home at midday far more frequently than the comparative group without children. Apart from the work factor, this leads to the conclusion that families attach a great deal of importance to eating together.

If they eat away from home, women have their midday meal at their actual place of work far more frequently than men. Instead, the latter tend to use the works canteen.

With evening meals, only singles aged between 14 and 29 reveal a tendency to eat away from home. But even with this group, only 12 percent eat outside their own four walls.

These overall domestic behavioural patterns also reveal a preference for the company kept at mealtimes: 85 percent of those surveyed like to be joined by their family or partner when they are having a meal. With higher net household incomes, this value rises to 90 percent, and with median household incomes, to 88 percent.

On the other hand, eating together at the place of work seems simply to serve the purpose of

consuming food: only one percent of those asked prefer to eat with their colleagues.

Where do you mainly go for lunch? (in %)



Where do you mainly go for your evening meal? (in %)



Who lays the table and when?

The competences are clearly regulated

A preference for eating pizza from a cardboard tray and fish from an aluminium container is not the picture we find in this study of habits of eating at table. Here in Germany, people like to lay the table, at least when time allows. This is revealed by the percentages arrived at in the question about the times at which the table is laid for a meal.



About two thirds of those surveyed state that at the week-end they regularly eat breakfast, the midday meal and the evening meal at a table that has been properly set. On weekdays it is only the evening meal (60 percent) that comes close to this value. During the week, just on 40 percent of those surveyed regularly lay the table for breakfast and their midday meal.

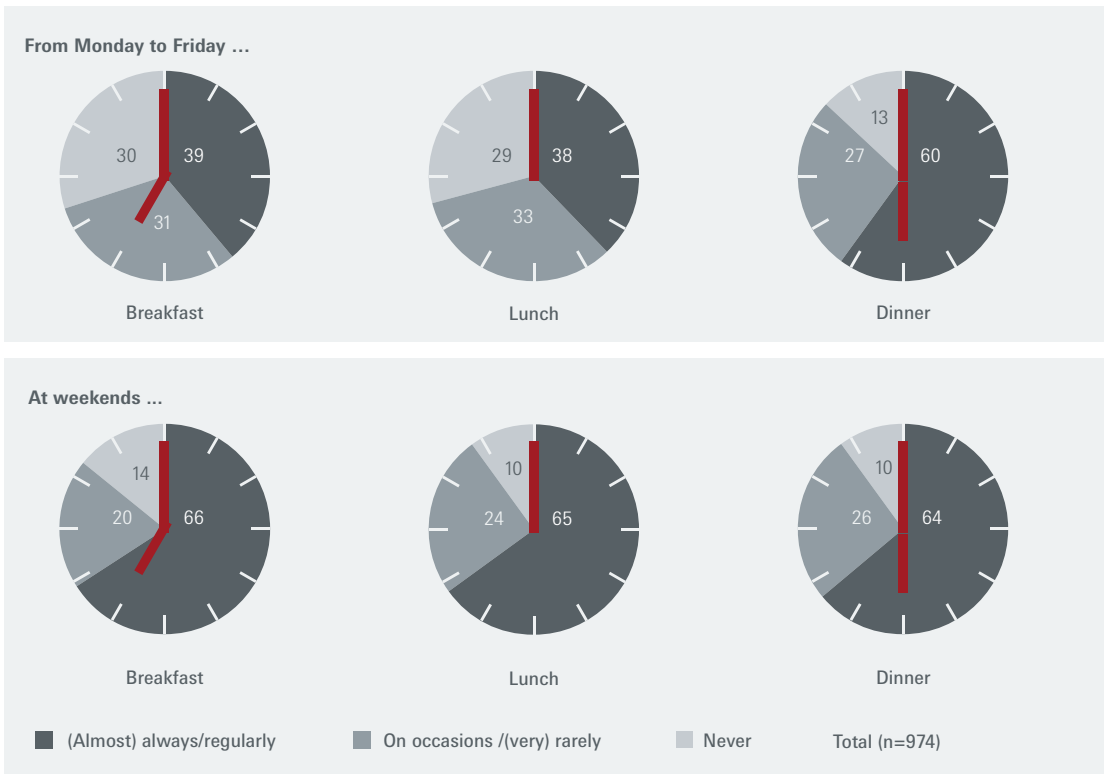
There are significant differences between those living alone and people who have a partner or a family: singles lay the table far less frequently. For the others, eating together is a regular ritual.

There are however clear rules for who does what: laying the table is usually a job for the women! Whereas 67 percent of the women surveyed see laying the table as being solely their responsibility, only 22 percent of the men regard it as theirs. If responsibility is extended to "together with my partner", this gives a value of 90 percent in the case of women.

Joint responsibility for laying the table together with the partner can be found in married couples or couples living together who are over the age of 50 and with married couples and partners aged between 30 and 49 without children: these organise their time as a joint effort. In families on the other hand, this responsibility is left to a disproportionate number of "other

members of the family", although it can be assumed that mainly children are involved, who are being schooled in the subject of table manners. This form of cooperation with the next generation is even more apparent in the case of single parents. For 51 percent of those surveyed, "other members of the family" are responsible for laying the table.

For which meals do you lay the table at home / in your family? (in %)



Which aspects define refined dining?

Decoration and functionality have priority

In terms of table decoration and design, the roles are clearly allocated: statistically speaking, women are the guardians of table culture. This is shown by the approval ratings for the various statements that were arrived at when the survey was carried out. Women agree much more strongly than the men who were surveyed with the statements “For me it is always important to have a beautiful dinner service for special occasions” and “If there are guests coming or on holidays I attach a great deal of importance to a beautifully laid table/harmonious table decoration.” But this does not mean that the theme is lost on the male target group. They do not want to do without a cultivated atmosphere at table, either.

There was a greater level of agreement amongst the men surveyed than the women in relation to two statements: items of tableware are first and foremost functional items and setting the table must be “quick and practical”.

As expected, more households with higher or average incomes also agree with the statements that are associated with a greater financial outlay, such as. “I’m happy to spend a little more money on fine tableware”. Here, the focus is more strongly directed towards high quality, durability and the brand of the tableware.

An examination of the different phases in life reveals that fine tableware is valued highly by families, couples in the the 30 to 49 age group and the over-50s target group. Here too, criteria such as high quality, durability and the brand have an increased relevance when it comes to

a finely laid table. The greatest level of overall support was received for the statement “A (multi-piece) dinner service is basic equipment in my household/the household in which I live”. The foundation is there at any rate for domestic equipment.

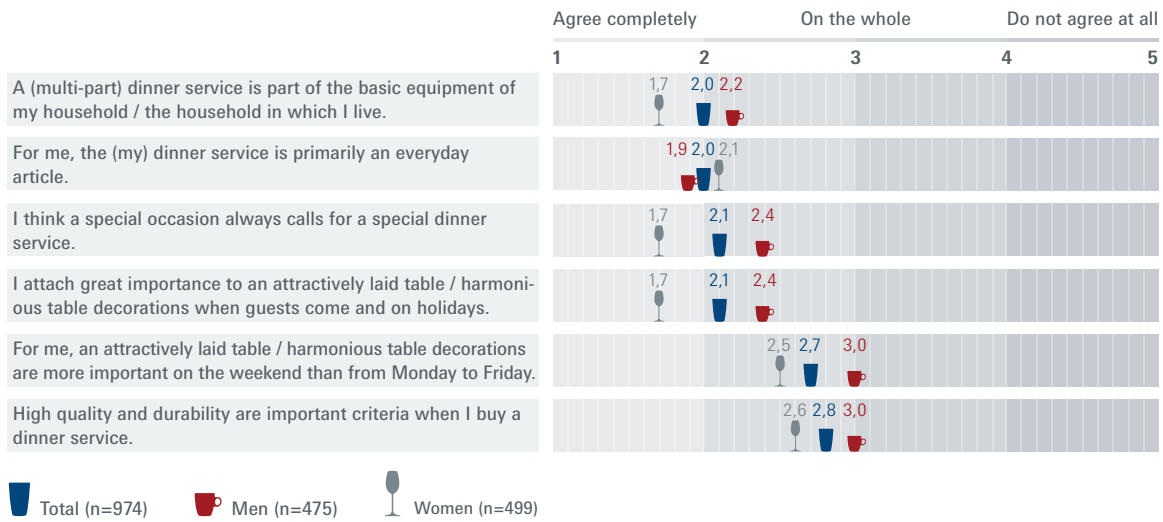
Further findings:

Women are open to inspiration. In no other statement is there such a divergence of agreement between men and women. For women, decorations in shops or in magazines are welcome sources of inspiration, but the interest among the men is not so strong.

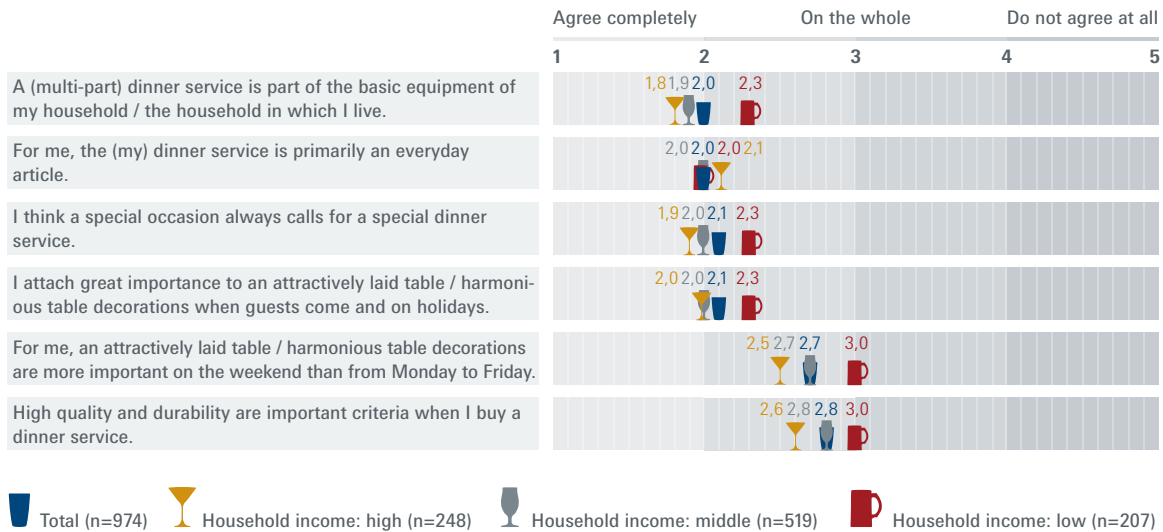
The over-fifties target group attaches a great deal of importance to a beautifully laid table and not only on special occasions, but also on weekdays. This group also makes more frequent use of branded articles.

Some statements on 'refined dining'

(Total/gender)



(Total/Household income)



What belongs to a well laid table?

Tableware is the number one

Ideas about a 'perfectly' laid table vary. Even so, there are basic patterns that help to appreciate the way the individual target groups contribute to our understanding of cultivated behaviour at table. What is very striking here is the dominant position of fine tableware/porcelain that graces German tables. But fine glassware, table linen and high-class cutlery also have their firm place in the overall composition. Table arrangements therefore retain their essential classicism; and porcelain dishware is still a decisive element in tableware.

In most cases, with men, the approval ratings for the components that are regarded as necessary for the 'perfectly laid table' are a good ten percent below the approval ratings given by women. The difference is even more apparent in the case of table linen, decorations or flower arrangements: here, there is at least a 20 percent difference.

What is also worthy of note is the fact that women are ahead of the men when it comes to the topic of fine glassware, although men are often considered in families or partnerships as the experts on wine or other drinks.

Breaking down the data according to net household income yields the results to be expected: households with higher or average incomes much more frequently consider that fine porcelain, fine glassware and high-class cutlery – in other words, everything that requires a certain initial investment – are part of a 'perfectly' laid table than people with a low household income.

The breakdown according to age, on the other hand, yields only marginal differences. Only in the cases of table linen, high-quality cutlery and floral decoration do the older people among those surveyed show a tendency towards higher approval ratings than the younger ones.



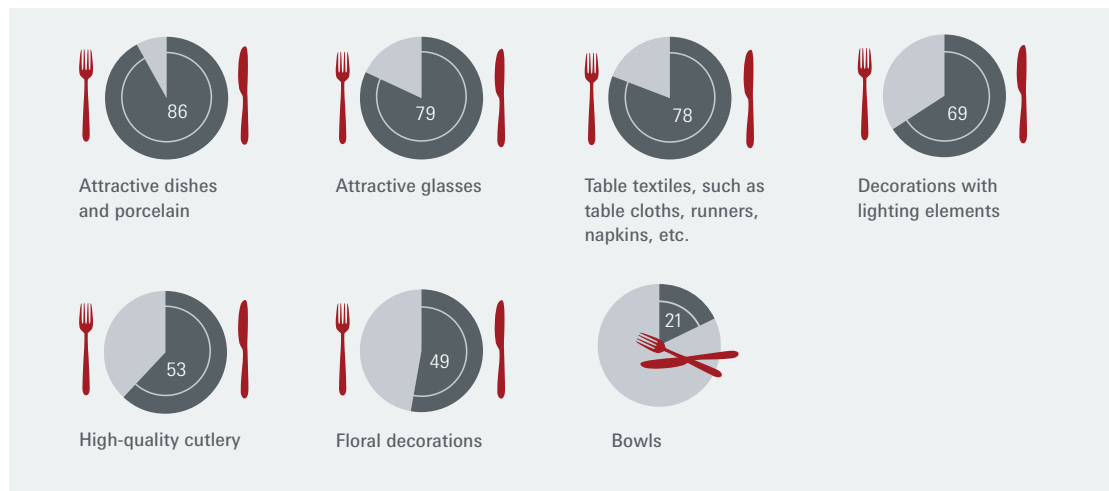
Further findings:

High-quality cutlery is an important item of tableware mainly in the over-fifties group (married / partnership or living alone). Decorations containing lighting elements such as candles are very much more frequently part of a 'perfectly' laid table, especially among the 20-to-39-year age group.

The idea that floral decoration is part of a 'perfectly' laid table, is mentioned by 59 percent of those surveyed in the new German federal states and thus much more frequently than in the old federal states, where only 46 mention this.

What, in your opinion, is part of a 'perfectly' laid table?

(Multiple mentions possible; in %)



Who makes the buying decision?

People buy their own cutlery

Even if fine tableware has a lot to do with tradition and the communication of that tradition is of paramount importance to family life, it is primarily the culture that is passed on, and not the dinner service that goes with it. As the study on dining habits in Germany reveals, two thirds of Germans buy their dinner services themselves. However, almost 40 percent of those taking part in the survey received one of their dinner services in the form of a present. This amount is still twice as high as that of an inherited dinner service. There is an extremely strong desire, therefore, to possess one's own tableware, leading to the conclusion that there will be continued growth in the number of additional consumer groups here.

This can also be concluded from the age of the tableware to be found in households. More than 50 percent of those surveyed who bought a dinner service/tableware, have done this in the last ten years and more than half of them even in the last five years. Naturally, as the age of those interviewed becomes greater, the information provided tends to indicate that the tableware has been around in the household for a longer period, as is also the case for households with a low net income.

For the most part, it is the women alone who decide on the tableware to be purchased. The difference is very apparent: 67 percent of the women take the decision, as opposed to 17 percent of the men. As the net household income increases, the purchase of a new dinner service is decided jointly. There is a deviation of almost 30 percent between the high and low income groups. This may be mainly due to the fact that more single households are to be found in the lower income brackets.

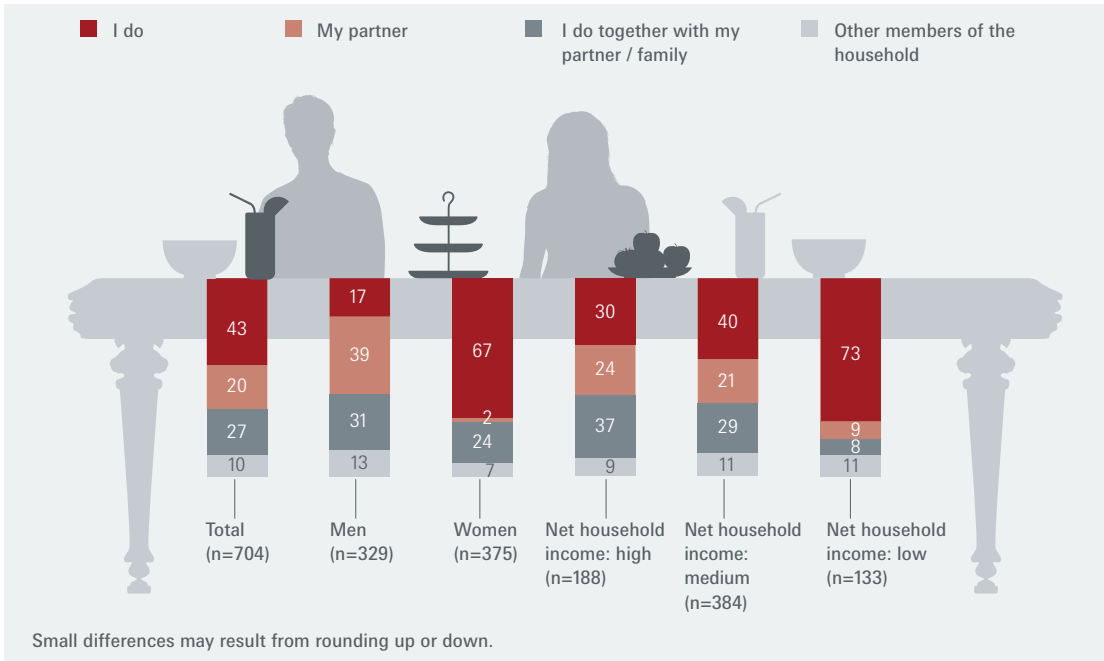
Further findings:

The proportion of dinner services received as gifts is particularly high among singles between 14 and 29 years of age. Clearly it is to a great extent the parents who assume responsibility here for initially equipping the household.

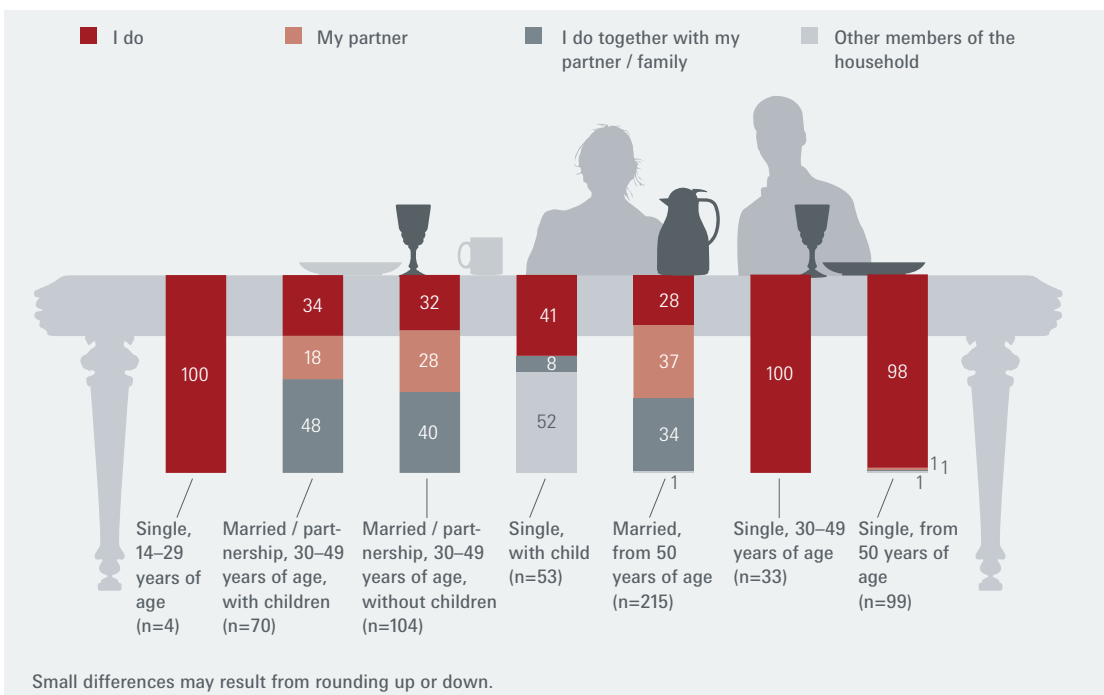
Households with a low net income tend to buy their tableware less frequently themselves, but receive it as gifts more frequently than other income groups.

Men often have a mental blackout when it comes to recalling the time when a dinner service was last bought. One of the main reasons for this is that this topic goes below the radar of most men.

Who in your household decides on the purchase of a dinner service / dishes? (in %)



Who in your household decides on the purchase of a dinner service / dishes? (in %)



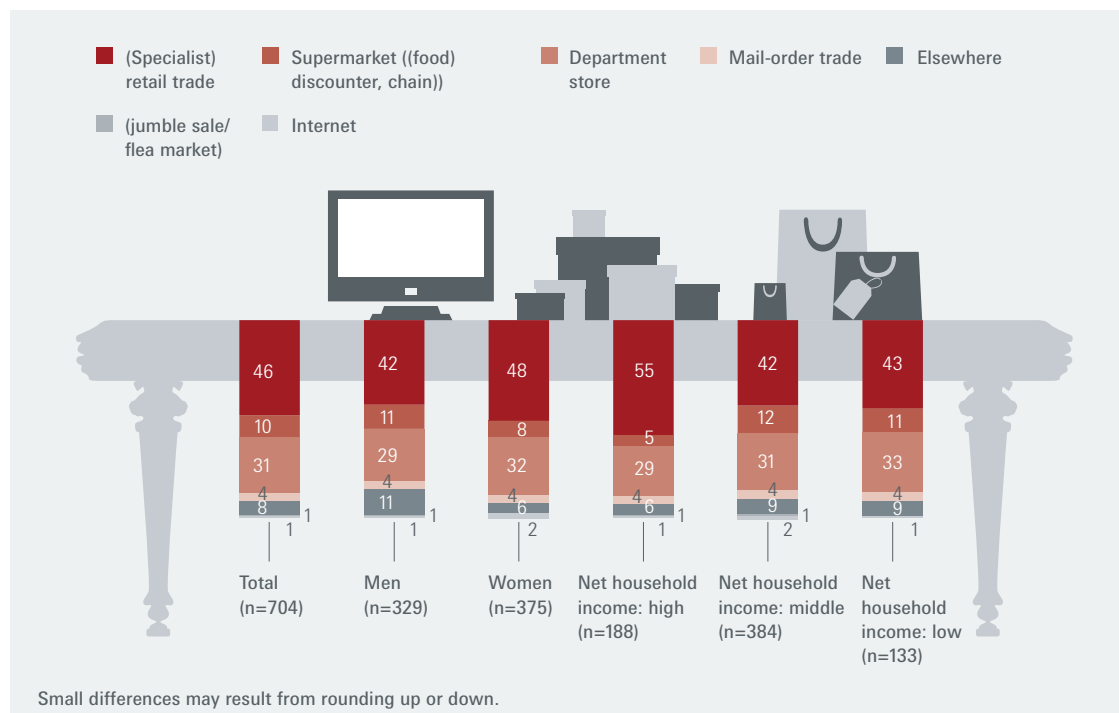
Who buys where?

The specialist trade is riding high

With a share of almost 80 percent, the specialist trade and department stores clearly and incontestably head the list of the various places where the last dinner service was bought. With a nominal 10 percent share, the influence of the chain stores, including the discounters and furniture shops, carries very little weight. Only one percent of those questioned use the internet as a purchasing source.

Above-average preferences for the specialist trade are shown by households with a higher net household income, and the over-fifties. Here the values for this distribution channel are in both cases significantly higher than 50 percent. Again, there are also differences between the men and women surveyed: almost half of the women questioned are quite happy to be advised by the members of the specialist trade, with men this is only a good 40 percent.

Where did you buy the last dinner service to be purchased? (in %)



Conclusions for the trade and manufacturers

Target groups with potential

In Germany, eating together at a beautifully laid table is still as important as ever. The widespread desire to dine at home in a cultivated manner at one's own table continues to offer significant potential to the trade and manufacturers.

The main target group for the 'well-laid table' theme continues to be women. They are the ones who have the say when it comes to laying the table and they are the ones who decide when it comes to selecting a new dinner service and other fine dining equipment. Another important aspect that should possibly be considered by the trade and manufacturers is that women are open to inspiring ideas that the trade, as well as magazines, can supply in the form of decorations.

Individual target groups are deserving of special attention and are worth being addressed specifically: families enjoy eating together and the 50 plus generation attaches a great deal of importance to a table that is laid to the highest

standards of quality. The economic strength of certain sectors of the population – e.g. the „baby boomer“ generation with secure living conditions and financial independence – are important target groups for the trade and manufacturers.

The specialist trade can act from its position of strength. For consumers, the theme of cultivated dining at table definitely lies with the specialist trade and the department store. This provides the specialist trade with the opportunity to reach customers immediately and to retain their loyalty over the long term by addressing them directly, by advising them and by mounting campaigns for the art of cultivated dining.



What is the status of cultivated dining at table in Germany? Where, when and with whom do the Germans prefer to eat? How significant is a beautifully laid table in this respect? And no less an important question: Where do the Germans acquire their porcelain, cutlery and glasses for use at home? Messe Frankfurt, together with the GfK Consumer Research Association [Gesellschaft für Konsumforschung], explored this question in depth by means of a representative survey. The findings: the Germans best of all like to eat at home and prefer the midday meal as their main meal. As ever, eating together as a family still ranks very high. People eat – if time permits – with the table laid for the meal. In addition to the above, the reader will discover what for the Germans is the ‘perfectly’ laid table and that for consumers the specialist trade is a ‘must’ when it comes to buying porcelain, glassware and cutlery.

ambiente

Ambiente is the leading international trade fair for products for the table, kitchen, household, giving and decorating, as well as for home and furnishing accessories. From 15 to 19 February 2013, more than 4,500 exhibitors occupying 27 exhibition halls show what consumers will be able to see in shops around the world throughout the year.

tendence

Tendence is the leading consumer-goods fair in the second half of the year. From 24 to 27 August 2013, renowned brands and international key players present their latest products and trends in the living and giving sectors. Held just before the autumn, winter and Christmas season, Tendence enables buyer to place targeted orders at the last minute.

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