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Segments in the market of Hungarian institutional catering

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Abstract

In our paper we are aiming to present food preference as a way of consumption typical of the individuals and consequently, a way of eating characterising working days. To carry out a more detailed preference examination, factor analysis was carried out followed by cluster analysis based on the segmenting effect of food consumer preferences. The role and the main features of institutional catering were analysed in comparing the segments of the whole sample and research. We assume that the differences outlined on the level of food preferences are reflected in choosing the way and circumstances of eating thus influencing the choice between several alternatives typical of working days.

Key words

Food consumer behaviour, out of home consumption, institutional catering, segmentation

Introduction

During the examination of food consuming behaviour we cannot ignore the changes in lifestyles and value systems as the lifestyle of the individual is reflected in their food consuming behaviour and eating habits. The changes in the value systems of the last few decades, the co-presence of dissonant values – the appearance of contradictory nutrition trends – have had some effects on the domestic food consumption, as well.

The appreciation of leisure time as a global tendency has generated such changes in the value system that offer opportunities for the characterisation of new consumer target groups as a segmentation criterion. According to *Törőcsik*, the most characteristic difference in the old and new consumers' habits can be noticed in their relation to time dimension (Törőcsik, 2003). The new consumers constantly suffer from lack of time do for them time is more scarce than money. This fact has an effect on their buying habits and the composition of the consumer basket. *Lewis and Bridger* characterise the modern consumer of our times by lack of time and confidence in their model. The influencing effect behind the new consumer's decisions and behaviour derives from the relative scarcity of time and confidence (Lewis, 2001).

The present-day society can be characterised by constantly being „on the move" and the pressure of time can be felt both in the life cycles of man and their everyday life. The accelerated pace of life has resulted in social changes, the re-assessment of lifestyle thus basically altering eating and food consuming behaviour patterns. Traditional eating habits are continuously losing their one-time significance nowadays (deritualisation) and a part of the consumers regard nutrition as a way of satisfying needs quickly without any formalities. The number of those for whom fast food means a quick and adequate solution is growing. Even the health conscious group of consumers can be divided into two parts: one group prefers fresh and natural food while another hopes to gain their physical and mental well-being from the consumption of food produced on the basis of the most modern scientific results (high-tech health) (Kutsch et al.,1998).

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The central values of the Western European nutrition tendencies are ethical considerations, health, time and pleasures. These values are also stressed in the decision-making system of the domestic consumers but in a modified form. The appreciation of time, the growing importance of health and hedonistic aspects can be noticed in several parts of our nutrition culture (Horváth et al., 2005).

The appreciated leisure time has a significant impact on the order of importance of food consuming preferences and the choice between the circumstances of eating. In our present paper time and the trends, tendencies of acceleration as well as its impact on the change of eating habits are given special importance.

Research background

The impact of time on food consumption could also be shown in former research results: the Agro-Marketing Department of Gödöllő University succeeded in identifying 7 food consuming groups between 1991-1994 within the frames of OTKA project no. 1574, one of those was the "time-conscious" segment (Horváth, 1996).

In 2003 three consumer segments were differentiated during the primary research carried out on a 200-member sample in Pest County, one of which was labelled as the group of "time-conscious consumers" who regarded "requiring restaurant services to save time" an important service. (On the list the mean value of the sample was 2.06 while in the case of the time-conscious segment it was 3.6)

According to the research result of GFK Market Research Institute on surveying eating habits in 2003 there are two such time-conscious groups who take on the opportunity of eating out to save time on cooking. These two groups are the segments of the "modern" and "irregular eaters" (GfK, 2003).

The impact of time on food sales

Time consciousness and time sensitivity affecting certain consumer groups also have an effect on food sales turnover. This can be noticed in the changes of product-and service branch as well as the structure of the retail trade network (Table 1).

Table 1

The effect of the subjective acceleration of time on food sales

<table>
<tr><th rowspan="2">Factors inducing change</th><th colspan="3">Areas of change</th></tr>
<tr><th>Product portfolio</th><th>Trade</th><th>Services</th></tr>
<tr><td rowspan="5">Time consciousness</td><td>Convenience food</td><td>Hypermarkets, stores</td><td rowspan="2">food delivery</td></tr>
<tr><td>Ready and half-prepared food</td><td>Shopping centres</td></tr>
<tr><td>Small portions, packets of food</td><td>Take-away catering units</td><td rowspan="3">On-line and electronic shopping</td></tr>
<tr><td>Pre-packed food</td><td>Food Courts</td></tr>
<tr><td>Finger foods</td><td></td></tr>
</table>

Source: own compilation

In the supply portfolio of *products and services* the convenience considerations have gained ground as supported by the fact that the proportion of fresh and frozen ready-made food rose by 4.1% from 1998 to 2002 in the EU (AMC, 2004). The increased demand of convenience can also serve as an explanation of the increase in the sales of ready-packed and long life cold cuts. According to the data of AC Nielsen more than 7% more of ready-packed cold cuts – both in value and quantity – were sold in 2004 than in the previous year. The more expensive but convenient products are primarily bought by the young of higher income and open to novelties but it is more and more popular with the members of the older generations. That is why some producers offer convenience food not only in premium but also in cheaper price categories (Pintér, 2004).

The impact of a faster life tempo can also be felt in domestic catering with the appearance of such new product types like "finger foods". The gourmet portions consisting of 2-3 courses consumed by hand without any cutlery or "trendy products" are offered ready-made and in long life form, as well, as a convenience product by the food industry. "Finger food" is easy and fast to be prepared and can be consumed in several forms.

Due to their little free time, consumers have new demands for *services.* There is a dynamic expansion in the demand for meals that can be ordered via e-mail, sms or telephone. The companies that offer different types of convenience services like food delivery, preference of electronic buying can meet with serious success in the market.

The growing demand for convenience has changed buying habits and the relation to time is expressed in two reverse ways in choosing a shop or an outlet. Part of the consumers do the shopping in hypermarkets to save time. They usually spend much time at work, work more intensively and generally have higher income but less time to spend their money. For them, the relative value of time is appreciated. They want to get hold of the basic foodstuff under one roof to save time. This tendency defined as *One Stop Shopping* in the specialist literature has resulted in the fact that the market share of hypermarkets has kept growing on non-stop since 2001 so 22% of the turnover of daily consumer goods derive from this channel.

At the same time, another group of consumers experience the process of shopping as a way of spending their free time. In this consumer layer the time spent on shopping is growing – unlike in the case of consumers feeling the acceleration of time in a subjective sense (Kozák, 2004).

The market of eating out based on national and international data

In our research a special attention is paid to one of the alternatives of eating out, the market of institutional catering whose structural changes cannot be separated from the special features of the market of eating out as well as the factors and trends influencing it. That is why we think it is important to review some domestic and international changes typical of the latter one. One of the main advantages of eating out is its adaptability to the new consumer demands generated by the acceleration, mobility trend. While food sales at shops can give a limited shopping experience both geographically and often in time, the alternatives of eating out can reach the consumer any time with their supply: e.g. when meeting with friends, during relaxation, entertainment, travelling or even at work.

The turnover of the food service sector adapted to the changing consumer needs grew twice as fast (by 5%) as the market of food sales in *Western Europe between 1999 and 2001.* According to the specialists, this growth will be continuous and by *2010* it will have reached a share of *43%* in food sales in Western Europe (Whitehall and Frezia, 2006).

The *national proportion* of eating out lags behind the international data and can account for *8-10%* based on the estimation of the experts but its role and share in food consumption are expected to grow.

When examining the proportion of eating out in food sales there is a slow growth experienced since the *low point of 1995*. From the beginning of the 1960s till the mid-1990s there was a constant decline due to the economic recession, the worsening income situation of the population and a general decline in the living standards typical of that era. *After 1995 a slight but continuous growth* could be experienced as a result of more favourable economic impacts.

Table 2

Data of food consumed at home or outside (eating out) 1989-2001

Name	Breakdown of consumption (%)						
	1989	1991	1993	1995	1997	1999	2001
Total costs of food	100	100	100	100	100	100	100
From which: - eating at home	92.6	93.1	94.0	94.1	93.4	92.0	91.7
- eating out	7.4	6.9	6.0	5.9	6.6	8.0	8.3
Annual value per capita at 1989 unchanged price							
Total costs of food	21,634	19,909	18,547	16,326	15,448	15,821	16,893
From which: - eating at home	20,230	18,534	17,440	15,367	14,434	14,558	15,496
- eating out	1,595	1,374	1,107	959	1,014	1,263	1,397

Source: Mikesné Mencző, 2004

The increase in the number and revenue of catering outlets refers to the *more intensely increased role of eating out after 2001*.

Table 3

Number of catering outlets between 2001 and 2005

	2001	2002	2003	2004	2005
Commercial catering unit	47,951	49,201	50,077	50,328	50,475
Institutional catering units at work	4,076	4,571	5,071	5,358	5,819
Total number of outlets	52,027	53,772	55,148	55,686	56,294

Source: KSH (Hungarian Central Statistical Office), 2006

The role of institutional catering in eating out

In our paper we examine one alternative of eating out, the institutional catering within the frames of our primary research. Making use of the typically cheap, preferential institutional catering *decreased significantly* after the change of the regime *to 2001*. One of the *reasons for it is that only the biggest companies* and institutions could ensure *catering services* for their employees by running an own restaurant or canteen at preferential prices. On the other hand, the decline can also be explained by the fact that the significant part of *women living in the countryside disappeared form the labour market* thus reducing the potential number of those requiring institutional catering. Due to the economic necessities and decrease in opportunities, cooking has also become the main housework type- mainly in the case of strata with lower income.

The fact, that more and more people became addicted to health cult similarly to the European tendencies – especially the younger women of higher status and salary – has also contributed a lot to the spread of this process so fewer and fewer of this consumer stratum have required the services of institutional catering (Mikesné, 2004).

However, institutional catering developed a lot after 2001: there was a dynamic growth in the number and revenue of catering outlets. This development has far surpassed the rate that characterised the turnover of the domestic retail trade.

Table 4

Revenues of catering outlets between 2002 and 2005

Revenues of catering outlets (million HUF)	2002	2003	2004	2005
Commercial catering unit	421,513	443,077	496,785	567,047
Institutional catering units at work	44,933	53,411	68,026	67,206
Total	466,446	496,488	564,811	634,258

Source: KSH (Hungarian Central Statistical Office), 2006

The shift from the low point was significantly due to the fact that the office blocks of *multinational companies* operating in Hungary and employing a lot of people have a kitchen or a restaurant. The development and spread of institutional catering were also supported by the increase of *tax-free catering contributions* above the inflation rate and also the fact that *nowadays more and more workplaces cover the extra costs of* hot meals. There is a growing demand for cheap and fast *catering services for hot meals* on working days.

The objective of the research

The examination if time as a value-making factor appears on the level of food preference was extremely important for us – like during our previous research tasks. We also supposed that *the appreciation of time can influence the choice of eating circumstances typical of the working days*.

One of the starting points of our research was that besides the influences of macro-environment *individual food preferences also play an important role* in choosing eating alternatives typical of the working days.

Furthermore, we also had the hypothesis during the research that those requiring institutional catering can be divided into further unique segments on the basis of their food preference *if the differentiating effect of factors determining food consumption can be felt in the choice between the eating alternatives at work.*

Material and method

The reason for this latter one is that due to the nature of the research only the active workers of the given county were regarded to be basic majority. The sample is not a representative one on county level as only information about the socio-demographic criteria of the whole population would have been available and not the statistics about active workers so it was not possible to carry out sample taking by the representative quota. In our questionnaire we examined the habits of the single food consumers by employing a 5-grade discreet semantic differentiating scale as well as eating alternatives typical of working days on nominal measure level and by selective question types. Ranking questions and a 5-grade discreet semantic differentiating scale were used to measure the factors influencing the choice of eating alternatives typical of working days. Regarding the fact that the lifestyle of the individual is reflected in their food consuming habits, a separate group of questions were applied to the examination of the lifestyle typical of the individual in two main aspects: on the level of the value system and the structure of free time. We surveyed 200 inhabitants of Heves County during our primary research by means of a (pre-tested) standardised questionnaire. During data processing we got 197 questionnaires that could be evaluated and these were assessed by using SPSS 11.5 programme package. In our *questionnaire* we examined the food consuming habits of the individual, the eating alternatives typical of the working days as well as their choice and influencing factors. Regarding the fact that the individuals' lifestyles are reflected in their food consuming habits, we analysed the lifestyle typical of the individuals from two aspects: on the level of the value system and on the leisure-time structure.

The socio-demographic characteristics of the sample

The breakdown of the interviewees by gender and age are illustrated by Table 5.

Table 5

The breakdown of the sample by age and gender

Age/gender	18-29	30-39	40-59	60-69	total
Male (%)	24.7	22.6	38.7	14.0	100%
Female (%)	22.1	20.1	40.4	17.3	100%

Source: own compilation 2007, N = 197

62% of the sample have higher education qualification, 38% possess secondary school qualification and there was no one in the sample with basic-level education.

Regarding income relations, nearly about one-third of the sample live on a monthly net income of 40-80 thousand HUF per capita. A bit fewer, 31% have a net income of 80-120 thousand HUF per month. The third most populous income group (19%) earns 120-180 thousand HUF per month.

Taking domicile into consideration we can state that the representation of those living in the city and in the country was 50-50%. Almost half of the interviewees (47%) are married and almost the same proportion (18% and 17% respectively) are single men and women. Further 9-9% are widowed or divorced.

Regarding the number of the people in the household, the biggest part of the sample live in 2-person households followed by one (25%) and three-person ones (14%). Families of four or bigger were not represented in the sample.

Results

Factors determining the food consuming habits of the sample

The interviewees considered *outer, qualitative features* like “the freshness, good taste and smell of food” the most important. The decisive role of outer, qualitative features in food consumption is also supported by previous research results. (Lehota et al., 1998), (Horváth et al., 2005)

When taking the research results of GfK on domestic food consuming habits into consideration the first place is also occupied by “the importance of food taste” that also strengthens the leading role of the outer, qualitative features of food (GfK , 2005).

Table 6

Criteria of food consumption according to the sample

Factors		mean	rank
The most important factors (mean >= 4)			
Outer factors of quality	Freshness	4.8	1
	Taste, smell	4.7	2
Factor of health consciousness	Free from artificial agents	4.2	3
More important factors (mean >= 3.1)			
Inner factors of quality	Variety	3.9	4
	Vitamin-mineral content	3.9	4
Price-value proportion	Value for money	3.9	4
Parts of time factor	Adequate packing	3.5	5
	Long life	3.5	5
	Practical packaging	3.4	6
	Quick preparation	3.3	7
Less important factors (mean <= 3)			
	Geographical origin	2.8	8
	Brand name	2.6	9
	Eating in restaurants to save time	2.3	10

Source: own compilation 2007, N=197

As the third most important factor, the interviewees mentioned the criterion of being “free from artificial agents”, which refers to the appearance of *health conscience* in eating habits. As a result of the frequent food scandals of these days for the consumers losing faith it is becoming more and more important to get reliable, controlled food.

The components of inner qualitative features such as “variety”, “vitamin-and mineral content” were ranked the fourth most important place in the preference order of the sample of the same mean value with the statement “value for money”. All this proves the dominant role of the suitable price-quality ratio in food buying preferences that is also proven by the examination of GfK in 2005 on surveying the eating habits of the Hungarian grown-up population. The research concluded that quality and the suitable price/value ration regarded as the most important factors of food purchase had been ranked the highest with almost the same values (GfK, 2005).

According to the sample, *time factor and its components* like “ready to prepare”, “practical packaging”, “adequate packing” are more important than average. This means that the points of view in connection with saving time and time consciousness have appeared but they have no priority over outer, qualitative features.

The opinion of the sample is in accord with the results of the national survey of GfK according to which the importance of the taste of food is prior to the rapidity of its preparation. The benefits of saving time have no priority over the price.

The last important factors of the preference order of our sample are “geographical origin” and “brand name”. The position of this latter one comes from the fact that brand awareness is not even typical of food purchasing of the domestic consumers such as in Germany where only 10% of the young choose a branded product consciously (Hartmann, 2003).

“Eating in restaurants to save time” was not regarded too important (mean = 2.3) by the sample members in their decisions on food consumption. The result is not surprising as it is not a typical practice for the domestic consumers to require restaurant services to save time on cooking. In Hungary the proportion of eating out of the total costs on food is only slightly over 8% lagging considerably behind the nearly 40% typical of Western Europe (Food Service Trend, 2006).

The results of our examination also proves that the influencing effect of time-related preference on food choice can be felt in consumers' opinions but cannot by all means regarded dominant. The factors that can be linked to the outer and inner criteria of quality as well as price are definitely given priority.

Segments formed alongside food preferences

The factors determining the food consumption of the respondents were measured on a 5-grade discreet semantic differentiating scale. The correlations between the criteria determining food consuming preference were examined by factor analysis by varimax rotation. However, the analysis did not bring an interpretable professional result. That is why a cluster analysis examination by using the method of K-means cluster analysis was carried out based on a full range criteria list including all variables determining food consuming preference to make segments of the respondents by food preference. In this process our objective was to form such food consuming groups based on food consuming preference whose members resemble to one another and suitable differentiation between the groups should be ensured at the same time. In the K-means procedure the number of clusters was predetermined according to methodology and the algorithm divided the respondents into these groups based on the features of their food consumption.

Factor analysis carried out about the determining factors of the food consumption of the interviewees did not bring a professionally interpretable result so the cluster analysis examination was carried out on the basis of the full factor list. Our objective was to group respondents into segments based on the peculiarities of their food consumption.

On the basis of the result of variety analysis a significant diversion could be concluded between at least two clusters regarding all factors influencing food consumption. The cluster analysis resulted in the following groups:

- *Cluster 1: „Price-sensitive food customers” (23 persons):* These respondents ranked only the criterion “cheap” higher than the mean value of the sample. They regarded the outer quality, taste, smell of the food of average importance together with the suitable price-value ratio. Due to their dominant price sensitivity it is not surprising that the members of this group attached no importance at all to eating out (1.08). That is why they are unlikely to become the target clientele of institutional catering.

- *Cluster 2: „Lovers of nutritive food" (51 persons): The members of the segment* regarded the freshness, variety and calorie content of food i.e. traditional points of view of food choice important so they are the lovers of nutritive, substantial foods.
- *Cluster 3: „Price sensitive cooking at home" (24 persons):* Practical food preparation *is important for them:* "ready to prepare", "long life" and "practical packaging. It is likely that these factors are important for those who are engaged in daily cooking. The criteria "cheap" and "value for money" were ranked the most important by them so it is not surprising that they do not require more expensive restaurant services to save time for cooking. The statement "restaurant services to save time" was ranked well below the mean (1.8). "Brand name" also had priority in their order of preference. Due to the price sensitivity typical of the members of this group it is likely that they prefer brands of cheap price category or commercial brands when buying food.
- *Cluster 4: „Pleasure-seeker consumers" (99 persons):* It is typical of the preference order of this group that only they attached a higher than average value to the statement about time consciousness and the importance of leisure time: "restaurant services to save time" (2.76). Furthermore, it is worth noting that they ranked the statement about the importance of price below the mean and, what is more, below than the three other groups (3.02). This fact also proves the hypothesis that primarily price sensitivity sets the limit to the widespread use of eating out in Hungary.

According to the chi-square test trial among the socio-demographic features gender, type of domicile and qualification influenced significantly the belonging to a certain segment. The cluster breakdown of age categories, marital status and income was examined in percentage as there were such segment- and demographic feature combinations whose correlation value was not interpretable sue to the low number of their components.

- *In the group of „Price-sensitive food customer"* the representatives of *males are dominant.* The members of *the older generations married and older than 40-59 living in the country* make up the biggest ratio (70%) of this segment, mainly (65%) with *secondary education* and their monthly income is *80-120 thousand HUF.*
- *The „Lovers of nutritive food" are also mainly men (55%),* young, aged between 18 and 39 *living in the city on their own*. In this segment the ratio of those with *higher education* is outstandingly high (88%) and they are the second well-off class with a net income of 120-180 thousand HUF per capita per month.
- *The representatives of „Price-sensitive cooking at home"* are mainly *women,"the weaker sex"* (62%), which is not surprising as cooking is still a traditional female role so it is quite understandable that the women-dominant group considered the factors of making cooking easier important. The bulk of this *segment* (75%) *is a city-dweller single.* Regarding age, the representatives of the *younger generations* make up the bigger ratio (61%). *The members of this group have the lowest income* (40-80 thousand HUF per capita per month) despite the fact that *48% of them have secondary and 52% higher education.*
- *In the case of "Pleasure-seeker consumers"* decisively *women make up the bulk* regarding gender: 64% of the group is women and 36% men. Typically (56%) they are *married, at the age between 40 and 59 with higher education and living in the city*. The members of this segment can manage the biggest budget as only this segment represented respondents (11%) with a net monthly income of *above 250 thousand HUF* per capita.

Table 7

Influencing factors of food consumption according to the sample and segments

Factors	mean	Price-sensitive food consumers	Lovers of nutritive food	Price-sensitive, cooking at home	Pleasure-seeker consumers not considering price
Eating in restaurants to save time	2.30	1.08	1.96	1.87	2.76
Brand name	2.60	1.13	2.05	2.75	3.11
Geographical origin	2.80	1.43	2.70	1.83	3.24
Calorie content	2.83	1.73	3.01	2.16	3.15
Protein content	2.78	1.86	2.52	2.37	3.38
Attractive packing	3.12	1.82	2.82	3.10	3.73
cheap	3.25	3.86	3.11	3.95	3.02
Easy to prepare	3.27	3.13	1.96	3.40	4.00
Low fat content	3.37	2.08	3.13	3.12	3.84
Practical packaging	3.44	2.00	2.56	3.66	4.17
Long life	3.47	3.43	2.39	3.66	4.00
Adequate packing	3.53	2.56	2.98	3.58	4.03
Appearance	3.57	2.08	3.52	3.20	4.04
Nutritive value	3.62	2.52	3.49	3.20	4.06
variety	3.87	2.34	4.09	3.83	4.12
Value for money	3.87	3.86	3.47	4.41	3.95
Vitamin-mineral content	3.91	2.65	3.80	3.41	4.39
Free from artificial agents	4.15	2.91	4.09	3.45	4.66
Taste, smell	4.69	4.69	4.35	4.58	4.89
Freshness	4.80	3.73	5.00	4.70	4.97

Source: own compilation 2007, N = 197

Judging institutional catering alternatives

Analysis was primarily based on the opinion of the respondents who use a kind of institutional catering alternative at least once a week. The results suggest that the deviations of choosing the way of eating can be traced back to the differences of food consuming factors typical of certain groups.

- *„Price-sensitive food consumers"*, as expected on the basis of their typical food preferences *use all institutional catering alternatives less than the mean value of the sample.* When examining ranking within the group canteen, food delivery and buffet – lagging significantly behind – are highlighted. The 13-13 per cent proportion of canteen and food delivery refers to the fact that these ways of eating are regarded relatively cheap and affordable even by the price-sensitive consumers.

- *In the case of „Lovers of nutritive food”* the need for substantial, nutritive food returns in choosing the alternative of institutional catering at work. The ranking with the alternatives of canteen, food delivery and fast food restaurant also proves this. This group consisting mainly of single men prefer *substantial meals, menus* that can substitute cooking on weekdays to alternatives offering smaller portions and lighter snacks.
- The members of *„Price-sensitive cooking at home”* have their meals mainly at a buffet on working days. It is followed by food delivery and canteen, which lags far behind. Their ranking suggests that they *have a quick snack during the day* and instead of main and hot meals they require the services of institutional catering mostly *at times between*. They are not interested in solutions ensuring hot meals and substituting cooking like canteen. The alternatives of having meals at times between the main meals are attractive for them.
- *„Pleasure-seeker consumers not considering price”* use the opportunities of canteen, buffet and food delivery most of the alternatives of institutional catering and these three solutions are used by them in the biggest proportion. *The members of this segment have both their main meals and those between within the opportunities of institutional catering.* As the factors connected to price are less important for them than the average it is not surprising that they prefer solutions more expensive but more convenient than cooking.

Table 8

Examination of institutional catering alternatives in comparison of sample and clusters of those using the service at least once a week (%)

Eating alternatives on workdays	Total sample	Price-sensitive food consumers	Lovers of nutritive food	Price-sensitive, cooking at home	Pleasure-seeker consumers not considering price
canteen	36	13	35	13	47
buffet	29	4	14	30	40
restaurants	9	3	14	8	10
food delivery	26	13	33	25	26
inn	9	3	11	9	11
fast food	15	3	31	8	14

Source: own compilation 2007*, N = 197; Relative frequency at which projection base is the number of those favouring the possibility of the given eating alternative at least weekly. The sample member could choose more alternatives simultaneously.

On the basis of our research results it can be stated that *those requiring forms of institutional catering are not homogeneous, even within them there are such segments identified where the points of time consciousness have special importance.* These consumers are the believers of convenient meals and strive to minimise the time spent on cooking and food preparation. “*Lovers of nutritive food” and “Pleasure-seeker consumers”* belong here who can be potential target groups of different institutional catering solutions especially alternatives standing in for main meals. The results of the research also prove that the factors typical of the food consumption of the individual are also decisive when choosing between the catering alternatives of the consumer on workdays. The segments created on the basis of food preferences have chosen different catering alternatives, i.e. *the preference order of food consumption determines the ranking of institutional catering alternatives*.

Judging the circumstances of eating

Table 9

Factors of eating circumstances typical of working days
(in average, 1= not important at all, 5= very important)

	Factors determining eating circumstances	Mean value of sample	Price-sensitive food consumers	Lovers of nutritive food	Price-sensitive, cooking at home	Pleasure-seeker consumers not considering price
Inner and outer aspects of quality	Nice surroundings	3.90	3.25	3.79	3.65	4.09
	Sight of food	3.60	4.25	3.75	3.50	3.53
	More menu	4.00	4.00	4.02	3.95	4.03
	Good quality	4.60	3.75	4.68	4.45	4.60
	Varied menu	4.10	4.00	4.00	3.70	4.20
	Organic food	2.88	1.00	2.40	2.40	3.30
	Quality assurance	3.35	1.00	2.70	3.60	3.70
Dimensions of convenience/time	Fast service	4.00	4.00	3.80	3.60	4.20
	Easily accessible	3.90	4.75	3.54	3.60	4.18
	Food delivery to workplace	3.66	4.00	3.30	3.25	3.90
	Well-known	3.31	1.00	2.80	3.25	3.70
	Promotion material	3.50	1.50	2.80	3.50	4.00
	Can be paid for by lunch voucher	3.70	3.50	3.40	3.70	3.80
Price factors	Value for money	4.30	4.75	4.00	4.30	4.30
	cheap	4.00	4.10	3.95	4.20	4.10

Source: own compilation 2007, N = 197

These factors were evaluated in a differentiated way by the respondents of the certain segments like in the case of food preferences and institutional catering alternatives.

- „*Price sensitive food customers*" preferred the factors connected to price when choosing the circumstances of eating: they ranked the statements "cheap" and "value for money" higher than the mean value of the sample. Besides the factors connected to price new demands also appear from their part: "easily accessible" and "ensuring food delivery" that *expands their system of criteria with time dimension. They considered the sight of food also important when choosing food.*
- *„Lovers of nutritive food"* ranked the alternatives of „good quality food" and „the alternatives of more menus" more important than average. In their case equivalents of qualitative criteria typical of their food consumption appeared among the criteria influencing the choice of eating circumstances.
- *The „Price-sensitive, cooking at home"* group seem to make decisions on the choice of eating circumstances also mainly on the basis of price. Beside price a new dimension also appears in this group, the *component connected to quality*. However, the group considered the fact of quality assurance from the part of the caterer more important than average.

- „*Pleasure-seeker consumers”* ranked everything to be more important than average except two factors as could be experienced in the examination of their food preference. The two factors of “good quality” and “the sight of food” were ranked as important as the mean value of the sample.

To sum it up we can state that factors determining food consumption appear in the choice of the way and circumstances of eating as a decisive criterion for the group members created during segmentation but *new expectations can also arise.* That is why the factors of convenience, time, quality and price cannot be so sharply distinguished when choosing eating circumstances as was illustrated in the case of food consumption. These dimensions are merged, affect together and simultaneously by creating a complex system of consumer requirements towards the caterers.

Conclusions

On the basis of our research results the dimensions that can be the main characters of institutional catering can be identified: convenience, time, quality and last but not least price as well as their suitable combinations. The players of the supply side of institutional catering compete in all the four dimensions at the same time. The domestic institutional caterers more and more driven among the rules of the competitive sphere are compelled to hold out at several levels. The participants of the supply side traditionally expect the institutional catering unit to mean a cheaper solution than the supply of commercial catering. Simultaneously, with the demand for cheapness further requirements typical of the consumer of the 21st century also come to the foreground: needs for adequate quality, varied food and ambient surroundings. On weekdays due to the short lunch break at work the aspects of saving time are becoming more and more important in the choice between ways of eating: fast service, easy accessibility or perhaps ensuring food delivery to the place of work. These criteria from the part of the consumer appear at the same time and they do not wish to neglect any of them to favour another. This situation poses a challenge to institutional catering operating on the borderline of public and commercial catering but the fact that new consumer demands can successfully be met in institutional catering is illustrated by several national examples.

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