

Následky spôsobené zmenami ekonomickej krízy na spotrebiteľskom trhu domáceho inštitucionálneho stravovania

Ensued due to the economic crisis changes onto consumer market of domestic institutional catering

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Abstract

In this publication we look into the effect of the economic crisis on the cafeteria system. Special attention is paid to the institutional catering of the fringe benefit. Several surveys prove that the role of the institutional catering is significant not only in having meals frequently but also in the view generally formed of the working conditions and the place of work. One of the objectives of the research has been to investigate the role of institutional catering as well as to get acquainted with the culinary practices at work and to analyse the preference system of the Employees when selecting the type of service. The results of our surveys have been analysed in comparison with a previous primary survey in order to be able to reveal the most typical characteristics of the changes. We reckon that the results give useful information to the food service providers in regard to the expectations of the potential consumers, the marketing activities to be used in order to enlarge and develop this service sector which – in view of the HR policy – plays a dominant role in both forming a general opinion about the workplace and increasing the loyalty of the Employees.

Keywords

institutional catering, food service, preferences, economic crisis, HR policy

Abstrakt

V tomto článku sa pozrieme na vplyv ekonomickej krízy na stravovací systém. Špeciálna pozornosť je venovaná inštitucionálnemu stravovaniu ako zamestnaneckej výhode. Niekoľko prieskumov dokazuje, že úloha inštitucionálneho stravovania je významná nie len v možnosti častého stravovania, ale aj z pohľadu všeobecne vytváraných pracovných podmienok a miesta práce. Jedným z cieľov výskumu bolo skúmať úlohu inštitucionálneho stravovania, ako aj zoznámiť sa s kulinárskymi postupmi pri práci a analyzovať výhody zamestnaneckého systému pri výbere typu služby. Výsledky nášho prieskumu boli analyzované v porovnaní s predchádzajúcim primárnym prieskumom, aby sme boli schopní odhaliť najtypickejšie charakteristické zmeny. Domnievame sa, že výsledky poskytujú užitočné informácie pre poskytovateľov stravovacích služieb s ohľadom na očakávania potenciálnych spotrebiteľov, marketingové aktivity používané s cieľom rozšírenia a rozvoja tohto odvetvia sektoru služieb, ktorý – so zreteľom na personálnu politiku – zohráva dominantnú rolu pri tvorení všeobecného názoru o pracovných miestach a zvyšovaní lojality zamestnancov.

Kľúčové slová

inštitucionálne stravovanie, stravovacia služba, preferencie, ekonomická kríza, personálna politika

Introduction

The economic crisis started in 2008 has effects on society even today. The effects are sensible not only in the economy, but in education, in healthcare and in the society too. The income decrease due to the crisis caused a decreasing consumption and decreasing living standards too (Csiszárík-Kocsir, 2011a, 2011b). The economic crisis started in 2008 did a big shoot on the economy in Hungary and in other countries too (Csiszárík et.al, 2008). Due to the tax and benefit changes introduced in 2011, the payable tax of the food voucher was raised to 19.04%. Although cold food voucher could be given to the Employees unrestrictedly in 2010, a tax of 97.8 % had to be paid. This year the Employer pays monthly the preferential taxes of the maximum 18.000 HUF of cold and hot food vouchers and the Employee decides whether to spend it on cold food or hot meal. The reason of the above is that the food vouchers are accepted not only at restaurants, canteens of workplaces and public catering places but at shops also to purchase food ready for consumption.

Aim of the article

Nevertheless, according to the forecasts, in 2012 the cold food voucher will be separated from the hot one while the amount of the hot meal voucher will be transferred to the so called Széchenyi Rest Card. The available amount on this card will be not more than 150.000 HUF / year which could be used at catering places or service providers of institutional catering. The plans to restrict on the availability of the hot meal voucher are good news to those working in the catering trade along with the fact that the Rest Card launched this year could be independently used for purchasing hot meal. Whether the Card will be accepted by every canteen, Food Delivery Company, snack bar and public catering place by January 2012 is still in question. It is because many professionals doubt whether the payment by Rest Card would be ensured by the service providers who have accepted the vouchers this year. This would be essential out of convenience and financial reasons to the Employees having Rest Card as well as to the food service providers primarily because this way their turnover would not be decreased (Tamásné Szabó, 2011).

Based on the probable changes and forecasts of next year it appears that the role of providing institutional catering will be significantly upgraded. This is also why we believe that the researches providing information on the expectations of potential consumers and their preferences could be of great importance to this sector.

Material and methods

The basis of our research have been the results of the survey carried out nationwide 2 years ago in which survey the consumer market of institutional catering was extensively analysed. As a result of the survey it has been found that the so-called "Time conscious" food consumers are the ones who are the most prone to use these types of services. According to the aspects of social demography the members of this segment are young (aged 25-35), having Bachelor's Degree and mostly live in town. Therefore in this research we have focused on this segment. We would have liked to know how the economic difficulties of 2010 have affected the consumer behaviour of this segment and due to this economic crisis what changes happened in the consumers in selection of institutional catering modes. An additional purpose of our research has been to mark the chief points of the next grandiose survey and outline the hypothesis. During the empirical process we used conscious, not

representative sampling. Between December 2010 and January 2011 students aged 25-35 learning at Higher education institutions and Adult training centres in Budapest and Pest county were asked. We used pre-tested standardized questionnaire in which – besides monitoring the effects of the crisis – preference analysis on selection of institutional catering modes was also analyzed and the options, allowances ensured by the Employer for eating was investigated.

Results

During our previous empirical research it has proved true whether using institutional catering depends not only on the consumer criterions but the Employee is affected by the facilities of the workplace as well. In the domestic specialist literature we can only find references in regard to the active Employees who can also be influenced by the food allowance and the infrastructural background provided by the Employer when choosing to eat at one of the food service providers at work. In Hungary we have been the first to prove this coherence based on the results obtained from the nationwide questionnaire involving 1000 people. That is why during the present survey we have placed special emphasis on the analysis of the criterions related to the workplace, more specifically on the role of the catering system when choosing the alternatives of institutional catering. We have examined what type of allowance(s) the respondents receive presently. *Based on the results we have discovered that the most favourite has been the food allowance which has been followed by the public transport allowance and the recreational allowance.*

Comparing this value not methodologically just in content with the results of a survey carried out on this same segment previously, we have learnt that *the percentage of those receiving food allowances at the moment is more significant (65%) than before.* It appears that in spite of the unfavourable tax conditions and the crisis, this allowance is kept and has become an even more favourable allowance among the Employers.

Allowances	Have a share (relative frequency in % of the respondents)
Recreational allowance (recreational voucher)	46,3
Transport allowance	51,6
Cell phone allowance	46,3
Sport season ticket	3,2
Training allowance	10,5
Internet usage allowance	24,2
Health insurance allowance	24,2
Life insurance	3,2
School Start allowance	12,6
Gift vouchers	5,3
Food allowance	80,0

Table 1.
Share in Allowances (%)

Source: own research, 2011. N=270

The measure of the food allowance has also been asked. According to this, the Employees receive from their Employers an average 10.096 HUF cold food voucher monthly and an average 8.790 HUF hot food voucher / month as food allowance. This is also a greater amount of money (6.800 HUF) compared to the results gained from the survey carried out on the same target segment 2 years ago.

Factors affecting the choosing the mode of institutional catering modes

When compared our previous and the present research results in regard to the factors affecting the Employees to choose the place to eat we have found that *the structure of the preference system has not changed significantly, however some differences have been found.*

	Average	Deviation
Agreeable, classy environment	3,54	0,5
Able to pay with cold and hot food vouchers	3,32	1,0
Quick service	3,56	0,5
Wide range of menus	3,14	0,6
Taste of the food, savouriness	3,79	0,4
Dietary food be offered	2,20	1,0
Bio food could be an option	1,97	0,9
Exotic food and flavours also available (e.g. Asian, Italian, French meals)	1,97	0,8
Inexpensive prices of the meals, menus	3,36	0,6
The location of the canteen would be easily approachable	3,48	0,6
The meal be delivered to my workplace	2,33	0,9
Fulfilling foods	3,10	0,8
The price paid for the food would be well worth for it	3,62	0,6
Able to buy Hungarian traditional food	2,95	0,8
The food service provider firm has to have a quality assurance system	2,91	1,0
Promotional material of the food service provider firm (info leaflet, prospectus) available at work	2,42	1,0

Table 2.

The preference system of the factors affecting the Employees when choosing the place to eat

Source: own research, 2011. N=270

According to the respondents, the most important factors have been said to be the internal and external elements of quality (“flavour of the food”, “agreeable environment”). At our previous survey these factors had been esteemed similarly. At the same time when compared to the previous survey there has been significant difference in the elements related to time (“quick service”, “easily approachable”) which importance have greatly increased. The result is not surprising in awareness of the fact that at the time of developing this survey from a demographic point of view we have specifically strived to reflect the food consumer segment featuring time conscious characters of our previous survey. There’s no wonder that the significance of the time factors affecting the selection of the service has been so authoritative among the respondents. Nevertheless, even in this specific consumer segment, the factor of “adequate price and value ratio” has been more determinative to

the quickness and comfortable aspects of the provided service. Therefore the questions of thrift and the influential effect of the price have kept its significance among the time conscious consumers. The statement of “be able to pay with food vouchers at the food service providers” has been regarded as great significance. The importance of this has increased compared to the results found 2 years ago. This also proves – particularly as a consequence of the economic changes – that there’s a real demand behind the pursuit of the Employers who try really hard to pay the extra expenses of providing hot meal in the form of food vouchers.

Opinions on institutional catering alternatives

We have analysed separately the most and the least preferred service types. From the institutional catering point of view, one of the most important potential target groups is the frequent guest of the cafeteria and luncheonette. According to the secondary preference the guests aim at having quick, simple meals during lunchtime which is also proven in the preference of the sandwich bars. When trying to find the right service provider quickness is preferred which is not surprising since it turned out from the survey that almost half of the respondents (47,4%) has only 30 minutes lunchtime. Besides the quick service providers the respondents would gladly eat in canteen which is the third most preferred place with a moderately big relative frequency (42,5%) to have lunch. But it is only

a possibility because many of the respondents (48,5%) work at companies where there is no canteen.

It has become obvious from the preference investigation that the opinions of the cafeterias and luncheonettes differ greatly. Half of the respondents consider them as the most preferred places to have a meal while the other half think of them as a dispreferred choice. Consequently it appears that this type of service provider divides the people. The results of one of our previous qualitative researches support the above idea. In this research the opinions of the service providers have been tested with spontaneous association technique. Some has had a view of the cafeteria as a place offering homemade, Hungarian food while others have reckoned it as a place lacking hygiene and serving too greasy food (Fodor, 2008). Relatively many have said that they would not eat at classic restaurants but it turned out that it has nothing to do with negative attitude towards the service provider or any unpleasant experiences but rather – similarly to the canteen – it is due to the fact that there are no such service provider nearby to their work.

Institutional catering alternatives	Primary preference (frequency %)	Secondary preference (% relative frequency)	Dispreference (% relative frequency)
Canteen	9,8	42,5	16,7
Snack bar	12,0	36,5	27,1
Traditional, classis restaurant close to work	3,3	35,4	31,3
Food delivery e.g.: Food Express	7,6	43,8	9,4
Cafeteria and luncheonette close to work	20,7	44,8	21,9
Quick restaurant close to work	6,5	37,5	26,0
Pizzeria close to work	-	-	27,1
Sandwich bar close to work (pl.: Sub-Way)	-	44,8	83,0

Table 3.
Opinions on institutional catering alternatives
Source: own research, 2011. N=270

Similarly to the investigation of certain service provider alternatives we have analysed differentiatedly the consumer preference system in regard to certain menu as well. We believe that it could be important for a service provider to know the type of meals its potential consumers might eat. Furthermore health consciousness can be an other important factor providers should be aware of (Szira et.al, 2005). It was revealed that the most favourite meals are the meat dishes, the pastry and the salads.

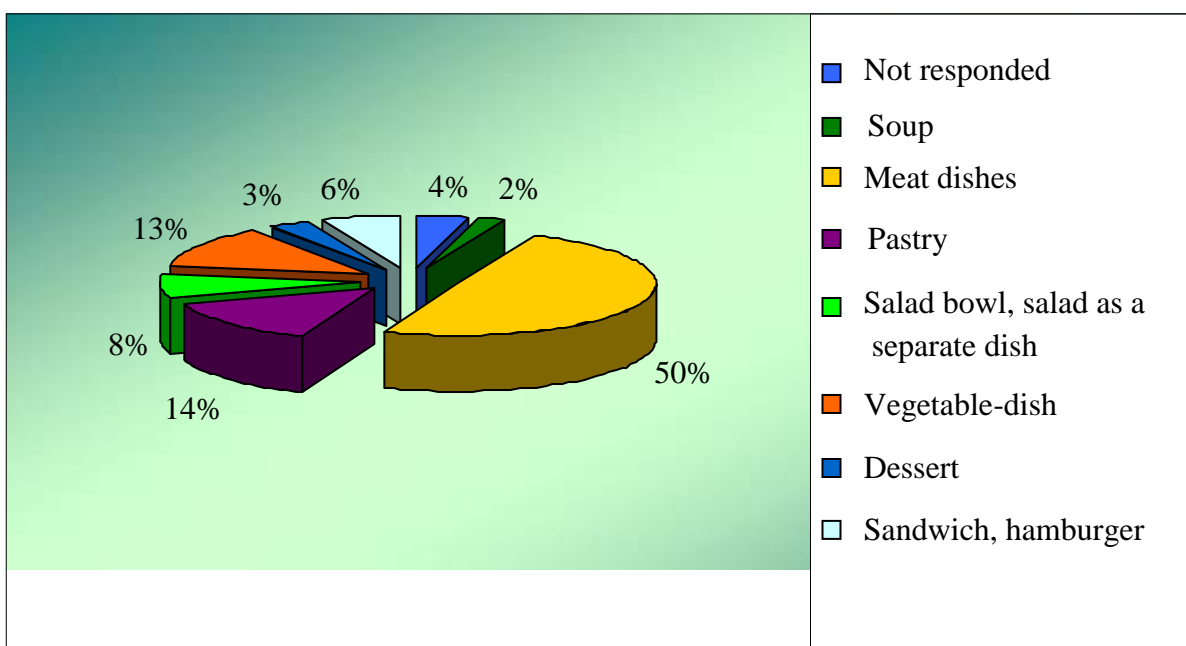


Figure 1.
The most favourite lunch meals at work (%)
Source: own research, 2011. N=270

Opinions on institutional catering

We have analysed the opinions on institutional catering through statements. It is a comfortable solution, the time spent on cooking can be saved and it is possible to eat hot meal at workdays – these have been said to be the chief advantages. The main parameters of the consumer behaviour towards the service are also strengthened by the menu selection and the preference of the available alternatives. According to the investigated target group the main competitive advantage of institutional catering, which is the alternative of consuming food at work brought from home, is its convenience. This information could be valuable to know for the service providers launching a communication campaign with an emphasis on the USP of its service.

Statements	average	deviation
Institutional catering is more expensive than cooking at home.	2,84	0,9
Institutional catering is more convenient than cooking.	3,20	0,8
With institutional catering hot food is ensured in the workdays.	3,30	0,6
During lunch at work time can be spent with friends, colleagues in a pleasant environment.	3,02	0,8
During lunch at work I can negotiate.	2,40	0,9
With institutional catering time can be spared on preparing meal at home.	3,03	0,9
I use institutional catering because I don't like cooking.	1,84	0,9
The meal brought in from home is the only good dish.	2,10	0,9
I would use institutional catering more frequently if more food allowance would be granted at work.	2,86	0,9

Table 4.

Opinions on institutional catering (1=does not agree at all, 4=agree completely)

Source: own research, 2011. N=270

Conclusions

Based on the results of the research it can be stated that the significance of institutional catering is notable within the cafeteria system and compared to the previous investigations it is growing in importance. This also supports the actuality of those researches which analyse the consumer behaviour of institutional catering. In the course of our current survey we have found that the following factors *the taste of the food, the prices related to the food and the quickness* play an outstanding role in the selection of this service. According to the respondents the competitive advantage of the institutional catering are *the comfort, hot food provision and saving time*. It is reckoned that to communicate these competitive advantages could be important to the marketing communication strategy of the food service providers. An essential result of the research is that we have managed to further differentiate the so called "time conscious" consumer target group which is the most open to use the institutional catering according to the viewpoint system of the service selection. It is recommended in addressing these consumer groups to apply the niche marketing which could be a good strategy to the smaller food service providers whom would be able to address the segments having special consumer needs with the help of well-fitted marketing tools.

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