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Trends in the Food and Beverage Sector of the Hospitality Industry

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Paper Title: **TRENDS IN THE FOOD AND BEVERAGE SECTOR OF THE HOSPITALITY INDUSTRY**

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Abstract

The hospitality sector in Ireland represents an important part of the tourism industry and comprises hotels, restaurants, pubs and clubs, guesthouses and self-catering operations. The largest component within the Irish hospitality sector is hotels. In addition to hotels, food and beverage operations comprise a significant proportion of the industry. These businesses operate in a highly competitive environment as a consequence of a number of factors. First, there is a downturn in the global and domestic economies with a corresponding decrease in business across the tourism industry (Failte Ireland, 2010; Pitta, 2010). Second, there has been a rise in market demand for, and expectations of, in-house facilities, quality of service and products and value for money (Jones, 2009; Hotel and Catering Review, 2010), where visitors want to experience excellence at all levels of service, which can be readily recognised as good value for money. Third, hotel capacity has increased by 40% in the eight years from 2000. This growth contributed to the increasingly competitive environment and an over capacity in the sector. Food and beverage operations expanded exponentially in the same period with severe competition in the sector (Kincaid, Baloglu, Mao and Busser, 2010). Finally, a sharp rise in operational costs has resulted in declining profitability for businesses in addition to the need to manage costs and provide lower prices across the sector.

Data available in January 2011 suggest that 2010 figures reflect worrying trends with all sectors of the industry experiencing deteriorating demand (Fáilte Ireland, 2010). In addition, the restaurant sector is facing a very difficult financial crisis according to the RAI (2010). A number of issues of concern have been identified, which include, energy costs, local authority service charges, rising costs of doing business, local competition and surplus capacity (Failte Ireland, 2011). Costs have not significantly reduced; consequently, margins are under severe pressure resulting in a slowdown and a decrease in business traffic and footfall (Pitta, 2010) and closures across the country with a large number of restaurant businesses entering examinership, receivership or liquidation in 2010. This is set to continue in 2011 with additional closures (Hotel and Restaurant Times, 2011; Howarth Baston Charleton, 2010, Hotel and Catering Review 2010).

The food and beverage industry is subject to numerous trends and these trends have an impact on business success or decline. A trend is defined as ‘a line of general direction of movement, a prevailing tendency of inclination, a style or preference, a line of development, or the general movement over time of statistically detectable change’ (Google Thesaurus, 2011). Whereas, a fad is considered to be a temporary popular notion, artistic activity, fashion or food that is usually followed by a large group of people for a short time (Google Thesaurus, 2011).

This paper analyses trends in the wider food and beverage industry and provides insights into the trends that are most likely to influence future business success. Trends, such as, consumer expectations, consumer spending, dining out, health, obesity and wellness, demographics, convenience, food trends and the food service industry's world wide top 10 trends are discussed. This paper is based on primary and secondary research providing a comprehensive snapshot of trends in the sector. Primary research was carried out through focus group interviews and an in-depth case study of the trends in catering in Dundrum Shopping Centre, Dublin.

This paper provides insights into the implications of these trends for operators of food and beverage businesses and considers drivers for success.

Literature Review

The purpose of this section of the paper is to examine and evaluate the literature on key trends in the food and beverage sector of the Hospitality industry along with their impact on consumer choice and spending.

According to Da Browska (2011) household sizes are smaller, healthy options are more important and safe food is a priority. In addition, organic foods are showing a slower growth pattern along with high quality and premium products. However, as suggested by Pitta (2010) customer expectations are increasing with lower price expectations the norm.

Datamonitor (2007), Euromonitor (2010) and Mintel (2010) reports indicate that in terms of spending, families have an increased demand for their spending to go on food retailing with costs considered to be higher than current inflation; suggesting that families are spending more time shopping around to get the best prices and value for money. This in turn has pointed to the fact that discount stores such as Lidl and Aldi's sales are up along with their market share. Own label goods sales have increased and there is a decrease in people spending on discretionary items. Research carried out by Leinwand, Moellier and Shiriram (2008) indicate that consumers are making significant changes to spending and are eating at less expensive restaurants and order less food when they dine out. In addition, Hartwell and Edwards (2009) suggest that people are shopping more locally and are buying seasonal and artisan produce where they offer value.

Euromonitor (2010) indicated that internet shopping has had a four times faster growth in 2009 than conventional shopping where consumers plan their shopping to avoid temptation. Pitta (2010) supports this and also indicates that there is a decline in organic sales and luxury produce as consumers are shopping frugally.

Industry executives globally identify health as an important trend in the current climate (Datamonitor, 2007). Consumers are 'acting holistically' in their quest for wellness. Otterbacken and Harrington (2009) suggest that consumers are more health conscious, are taking more self-responsibility for their health and are adopting a broader wellness perspective towards living. In addition, consumers are increasingly responding to allergies and intolerances and are opting for minimally processed products while rejecting products containing perceived harmful ingredients. According to Datamonitor (2007:a) more consumers are increasingly dieting or modifying eating plans through restriction, avoidance and moderation. Many consumers are constantly dieting and/or trying to lose weight and are increasingly choosing better for-you 'low and lite' and low-calorie food (Da Browska, 2011) alternatives. Consumers are increasingly opting for lighter main meals and are moderating their alcohol consumption (Mintel, 2009). In addition, Datamonitor (2007:b) suggests that consumers are embracing the idea of 'positive nutrition', embracing diet diversity, a more balanced and varied diet and are demonstrating an interest in, and consumption of natural and healthy products. According to Pitta, (2010) Subway has embraced this trend in its marketing and communications campaigns. In addition, consumers are showing extremely favourable attitudes towards and increased consumption of, fresh food and drinks and are eating specific food types and are healthy snacking to suppress hunger. Data Monitor (2007) indicates that 36% of Europeans and Americans consume a healthy snack at least once a day. In general, health and wellness require a wide variety and choice of product and food and beverage offerings with a specific need for low carbohydrates and calories, fresh product offerings, gluten free, organic and safe, where ‘real’, ‘healthy’, ‘authentic’, ‘traceable’ and ‘wholesome’ are associated with food (Hartwell and Edwards, 2009). Indeed, O’Regan (2011) suggests that if people do not consider their diet and eating habits the number of people in Ireland diagnosed with diabetes will raise from 141,063 to 200,000 in just four years.

Euromonitor (2010) suggests that consumers are less willing to sacrifice health over convenience and the indicators are that the dried fruit market and pre-prepared vegetable market sales are up along with convenience meals using healthy ingredients (Plate Magazine, 2008). However, Datamonitor (2007) research indicated that one in ten children in the UK were considered to be obese resulting in the banning of coca-cola from school dispensing machines and programmes, such as, Jamie Oliver and his attempts to change the face of the ‘traditional’ school dinners. In addition, research indicated that the diet industry is a £10 billion industry but has a success rate of only 1%.

Datamonitor (2010) suggest that meal preparation in the 1980’s took 60 minutes, in the 1990’s, it was 20 minutes. By 2007 it was 15 minutes and by 2011 the cooking from scratch / just cook ranges will be the trend reducing the difficulty of preparing meals (Da Browska, 2011). One example of this would be the Christmas cake ready to cook pack developed by Delia Smith for Christmas 2010 and the ready to assemble Mexican fajita meals where there is a feeling of doing it yourself with these semi-finished products and recipe kits (Da Browska, 2011).

Datamonitor (2010), Mintel (2007) and Mintel (2010) research reports indicate that the traditional meal concept is changing where consumers want food everywhere and that there is a snacking culture developing with the focus on healthy snacking. In addition, Alonso and O’Neill (2010) suggests that consumers want fresh food fast but want it to be the ‘real thing’ with superior taste and quality and suggest that there is a growth in origin and integrity of food (Hartwell and Edwards, 2009) with farmers markets up by a 400% rise over the last five years and a comeback for the traditional food types such as ‘Grandma’s apple pie’ where quality is the focus (Da Browska, 2011). This is compounded by the rise of celebrity chefs and celebrity chef branding (Jones, 2009) used to endorse foods – an example of this is Rachel Allen’s affiliation with O’Brien Sandwich Bars promoting ‘signature sandwiches’. Hartwell and Edwards (2009) and Sloan (2009) support this when they note that there are diverse lists of descriptors that are attractive to consumers such as, ‘local’, ‘artisan’, ‘house-made’, ‘seasonal’, ‘natural’ and ‘organic’ all designed to indicate enhanced food characteristics.

Trends in dining out suggest that dining out is routine, however; consumers are looking for special offers, gimmicks and two-for-one offers. The informality of eating out occasions are increasing, dining out is not considered a special occasion anymore. Consumers are considered to be time poor but want value for their time (Mintel, 2009). Indeed, Ramanathan and Ramanathan (2011) support this and indicate that value for money is a critical attribute with good service for the best possible price. The face of eating out has changed, it is less planned, more often and at irregular times, which, has propelled the increase of higher share transactions of Quick Service Restaurants (QSR’s)(Fast Service as opposed to Fast Food). In Europe and the US the QSR’s have 50% of all food and beverage business (Euromonitor, 2010). However, in the current price sensitive climate the frequency of dining out does not change substantially because of the economy. What does happen is that diners tend to ‘trade down’ during a recession (Pitta, 2010; Leinward et al., 2008). What customers are demanding is value in all its guises. This includes price, quality, standards, experience, flexibility and the welcome / customer care and service which, incorporates many tangible and intangibles delivered with consistency, quality and creativity (Jones, 2009).

Euromonitor (2010) indicates that demographics influence the eating out experience in terms of income levels, ethnicity and age where these have an impact on the 'occasion' and the need. Datamonitor (2010) report that younger diners are searching for convenience rather than a dining experience and request fast casual dining experiences with fresh food served restaurant style which has influenced the growth of noodle bars, the 'grab and go' concept and counter service where the customer takes their meal to their own table. This has also seen a rise in the eating on the run phenomenon from the USA and the increased frequency of dashboard dining. Research by the UK consultancy group, Horizon, has shown that the 'grab and go' business has grown by 10% year on year (Hospitality Times, 2009) The trend of flexibility appears to be on the rise according to The Hotel and Restaurant times (2010) with customers becoming ultra sensitive eaters, requesting a broader range of choices to customise and control diets, and menus, dishes and specials catering to individual needs (Euromonitor, 2010). In addition, Da Browska (2011) suggests that as there is an increased interest in the customs of other countries consumers are not afraid to be experimental and need restaurant to provide menus that cover a wide range of culinary experiences with a broad range of ethnic diversity.

There is a growth in the trend for consumers to replicate their restaurant food experience at home which has in turn seen some development in restaurant branded dishes and products 'to take out' (Pitta, 2010). In addition, there has be an increased growth of the 'celebrity chef' and programmes with developments in cooking these dishes at home replacing the dining out experience thus impacting on the restaurant business. According to Datamonitor (2010) the top ten trends in the food service industry world wide are presented in the following table.

Table 1: Food Service Industry World Wide: Top Ten Trends

Food Service Industry World Wide: Top Ten Trends
1. Quick fix prepared food *e.g. bagged salads*
2. Drive-and Go take out foods
3. Inherently Healthy naturally healthy foods
4. Fancy premium gourmet foods *e.g. fish*
5. Authentic - Farm-Friendly organic & natural
6. Ethical fair trade, companies that "care"
7. Security; no bacteria; no virus; no contamination
8. Layering of Flavors *e.g. spices, oils & vinegars*
9. Grazing healthier snacks *e.g. diet bars*
10. Low; No; and Less; - low calorie & light products

Source: Datamonitor (2010)

In support of this, Minitel Research (2010) suggests that the restaurant industry will focus on high quality food and ingredients to 'lure' customers into their operations. This, they suggest, will involve moving away from cost savings and focusing on high end quality and will revert back to the classically simple fare of yesteryear. They also indicate that 'rustic' will be the buzz word for the coming year, menus will feature healthy foods that deliver on flavour and that regional ethnicity is a developing and growth sector. Indeed, Hartwell and Edwards (2009) suggest a renaissance in consumer preferences for quality and regionally dominated local ingredients. This view is shared by Alonso and O'Neill (2010) and Judkis (2009) who state that better tasting food is a major motivator for using local product items on menus in research carried out for the Chipotle Mexican Restaurant Chain in the US. Additionally, Alsnso and O'Neill (2010) indicate that increased customer demand for local products is driving a need to use local.

This literature review identified significant and diverse trends in consumer behaviour impacting on the food and beverage industry. It is clear from this review that an understanding of the breadth of trends is necessary in order to manage food and beverage operations and that different stakeholders have different needs for information, therefore, it is necessary for operators in the sector to continuously scan trends impacting on their business. It is clear from the literature research that there are diverse trends influencing consumer behaviour in the food and beverage sector of the hospitality industry. In addition, despite the detail that has accompanied the literature on trends there are no clear guidelines on which trends impact strongly on consumer behaviour, apart from value for money. It would appear that the analysis of trends in the sector is a very diverse subject, which points to a weakness in identifying key trends for a particular operation.

The next section briefly considers and evaluates the research methodology that was followed for this research paper.

Research Methodology

In order to investigate the trends influencing the food and beverage sector of the hospitality industry, empirical research was carried out with a group of researchers who carried out an in-depth study of the Dundrum Shopping Centre in Dublin Ireland. A focus group interview was carried out with this group of researchers. In addition, an in-depth study of the Dundrum Shopping Centre was carried out by the author. The focus group stage of the research offered the opportunity to investigate a broad overview of the Food and Beverage offerings at Dundrum. The in-depth study by the researcher offered the opportunity to analyse in detail the outcomes of the focus group interview. The objectives of the research were to:

- To investigate key trends impacting on the food and beverage sector of the hospitality industry;
- To analyse trends in food and beverage offering in a case study of Dundrum Shopping Centre
- To identify key themes and drivers for the operators of the food and beverage sector.

A mixed methods research approach to investigating trends in the food and beverage sector of the hospitality industry was selected as it gave an opportunity for the wide ranging and diverse issues associated with the concept to be studied in greater depth.

The next section presents the findings of the focus group interview and the in-depth study of Dundrum Shopping Centre.

Results of the Case Study of Dundrum Shopping Centre

A summary of the focus group interviews and the in-depth research study carried out at Dundrum Shopping Centre indicted that recognized brands and brand names predominated in the shopping centre and that there was a recognized presence from international chains and global brands which proved to be very popular. The research also indicated that location and the positioning of the units trading in the shopping centre impacted on footfall both in the food village and in the stand alone units positioning. Casual dining was the main feature of the type of food and beverage offering at the centre. Quality expectations appeared to predominate in terms of food quality, service quality, décor and infrastructure, hygiene, core products, layout and menu design and content.

Service trends suggested that fast service brands predominated (not to be confused with fast food) and that different styles of service was evident from mobile, self service, table service and counter service. Table 2 presents the findings of the types and variety of cuisine to be found in the Shopping Centre.

Table 2: Types and Variety of Cuisine

Types and Variety of Cuisine	
■ World Cuisine – Frangos ■ Asian ■ Bagels – Healthy ■ European ■ Traditional ■ Mixed Fusion ■ Japanese ■ Italian ■ Speciality restaurants ■ Sandwich Bars ■ South African	■ Burger *Home Made / award winning brands* ■ Organic bars ■ American ■ Juice Bars ■ Coffee Shops ■ Ice Cream kiosks ■ Bars ■ Steak houses ■ Fast Food Outlets

Table 3 presents the International Brands providing cuisine in the Centre. These brands provide predominately Italian, Asian and North American cuisine.

Table 3: International Brands providing cuisine in the Centre

International Brands providing cuisine in the Centre	
○ GBK ○ Peri Peri Chicken ○ Nando's ○ Yo Sushi ○ Milano ○ Mao ○ Nando's ○ Gourmet Burger	○ McDonalds ○ TGI Friday ○ KFC ○ Eddie Rockets ○ Bennigans ○ Pizza Hut ○ Starbucks

Location would appear to be an important consideration and table 4 presents the findings of the location of the units at the Centre.

Table 4: Location and Positioning of Outlets

Location and Positioning of Outlets
■ Central positioned in main shopping areas ○ BB's, Bagel Factory, Starbucks, Butlers Chocolate Cafe ■ Food Courts ○ Frangos World Cuisine ■ Food Village ○ Mao, Dunne and Crescenzi, Milano, Siam, Nando's, Bars etc ■ Food Village ○ Eddie Rockets, McDonalds, KFC, TGIF, Chinese Buffet ■ Featured as part of a retail outlet ○ M&S, Harvey Nichols ■ Ice Cream / Coffee Kiosks - *Throughout* ■ Take Home Ready to Cook Meals - *Retail*

From a positioning perspective there were a number of stand alone units, a cluster of units in one area and a food village. The fast service operations appeared to be the busiest operations. Brand recognition also appeared to be important. Value for money meal deals were chosen over standard a la carte in most dining transactions. Coffee houses were doing 30% of the overall business in the food outlets and operations perceived to be different were popular with the younger generation, for example, Yo Suchi and Nando's who appeared to frequent them as a social outing and not necessarily shopping in the centre.

Finally, the research indicated that the successful operations presented the following: They had a great concept, there was a high standard of cleanliness and hygiene, they provided heightened and obvious value for money and were price conscious, and there was an evolving menu that continued to attract the regulars. It was evident that these units provided a fresh product offering and that the product was made on the premises. In addition, health consciousness was an important element of the menu offering. These operations had systems in place and were systems run operations. There was evidence from these systems run operations that there was an efficient management and staff team in place. The operations' perceived to be different appeared to be doing particularly well in terms of volume of customers and were continuously busy with people waiting to gain access to the operation.

From the findings of the research it would appear that there are a number of key trends impacting on the food and beverage outlets at Dundrum Shopping Centre. Trends such as international brand recognition, value for money, meal deals, location, service and perceived to be different are key drivers for success.

Discussion and Implications for the Food and Beverage Sector of the Hospitality Industry

The research showed that consumers are more discerning and seek value for money. These consumers are health conscious and are sensitive to price. This would suggest that an ability to recognise trends and react to them will help businesses develop and succeed. These trends influence how consumers act and purchase, therefore, operators need to tailor products and product positioning to meet the needs of these consumer trends. The focus should be on providing credible, healthy, authentic food.

The primary research, identified a number of trends such as international brand recognition, value for money, demographics, value in all its guises, price, meal deals, location, service and 'perceived to be different'. The trends identified reflect the work of Da Browska (2011); Pitta, (2010) Leinwand et al., (2008) and Hartwell and Edwards (2009) who highlighted value for money, quality, local, and artisan as critical attributes and trends influencing consumer behaviour in the sector. According to Jones (2009), what customers are demanding is value in all its guises and this includes price, quality, standards, experience, flexibility, customer care and service which incorporates many tangible and intangibles delivered with consistency, quality and creativity. These trends reflect the findings of the in-depth case study research of Dundrum Shopping Centre.

Conclusions:

Dundrum Shopping Centre presents a unique example of a diverse selection of food and beverage outlets under one roof from local artisan brands to internationally recognised brands. The case analysis illustrates the impact of trends on consumer behaviour choice when eating out and sets out the influences these trends have on the choice of outlet visited. Food and beverage operators can use this case study to better understand trends and the impact these trends have on their operations. Recommendations can be considered under a number of key themes which includes innovation, food, price, quality, operations and strategic focus. Under each of these themes there are drivers that influence consumers when dining out. Overall, the consumer will be unforgiving of operators who adversely impact on their dining out experience, especially where the experience may be the only one they can afford in the current economic climate. The food and beverage operator will only have one change to get it right. The following model (figure 1) sets out these key themes and drivers for food and beverage operators.

Figure 1: Key Themes and Drivers for Dining Out

Food

Provide interesting food and beverage offering in intersting and unique ways

Consumers want healthy, safe and local

Consider the classical simple fare of yesteryear

Healthy option menus - fresh products and fast service

Standard of coffee offering is key to success

Use local ingredients and products over others

Quality

Introduce an internal auditing function to monitor quality

link authentic, better and quality with healthy eating

Ensure service delivery and consistency and maintain standards

Provide 1st class hygiene at all levels

Price

Value meals - at affordable prices

Manage costs but focus on high end quality

It is fashopnable to be frugal and inventive about saving money - value and meal deals are important to the customer

Value led, quality eating out options

Value for money experience is a driver with quality food, cleanliness and friendly staff

Provide flexibility in pricing at off-peak times

Summary

The Dundrum Shopping Centre represents a unique example of food and beverage offerings, all under one roof. Although a shopping centre, the food and beverage offerings in the centre are used because of their uniqueness in terms of brand recognition and entertainment value and the perception that some of them are 'different'. The variety and choice of outlets in Dundrum cater for diverse consumer needs and are a strategic fit with current trends in the food and beverage industry. This in-depth analysis of the food and beverage outlets of Dundrum Shopping Centre has generated insights into the diverse range of outlets in the shopping centre and provides lessons for operators of food and beverage outlets and shopping centres' elsewhere.

Limitations

It is important to note that the objectives of this research were to investigate key trends impacting on the food and beverage sector of the hospitality industry and to analyse trends in food and beverage service in a case study of Dundrum Shopping Centre. However, as this study focused on one Shopping Centre in Ireland providing Food and Beverage outlets, this limits the generalization of the findings, therefore, the findings should be viewed from a perspective of consumers' behaviour patronizing food and beverage outlets in an urban shopping centre setting. The consumer behaviour of this population by itself is significant in terms of viability measurability and active food and beverage trends.

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