

# Understanding the lunchtime consumer

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# The Sodexo Lunch at Work Report 2012



# Methodology and Definitions

## Methodology

- 2,000 online interviews from Allegra's EatingOut™ Panel
- 616 online interviews with employees in workplaces
- In-depth industry interviews
- Considerable desk research

Worker Lunch	Purchase Location	Consumption Location	Status in Market Value	Status in Market Volume
At home	N/A	At home	Included	Excluded
Packed lunch	N/A	Breakout area/Desk/Outside area	Included	Excluded
Workplace facility	Restaurant(canteen), café	In the workplace	Included	Included
Grab & go	Supermarkets, cafés, coffee shops, sandwich bars, fast food (all take away)	On-the-go/In the workplace	Included	Included
Going out for lunch	All eating out establishments	Inside establishment	Included	Included

# Lunch at Work Market Size Split by Value Share

## ■ Segment breakdown by value

### Packed Lunch



**34.1%**  
value share  
£5.40bn

### Shop / Supermarket



**14.2%**  
value share  
£2.24bn

### Workplace



**13.8%**  
value share  
£2.19bn

### Café/ Sandwich Bar



**13%**  
value share  
£2.10bn

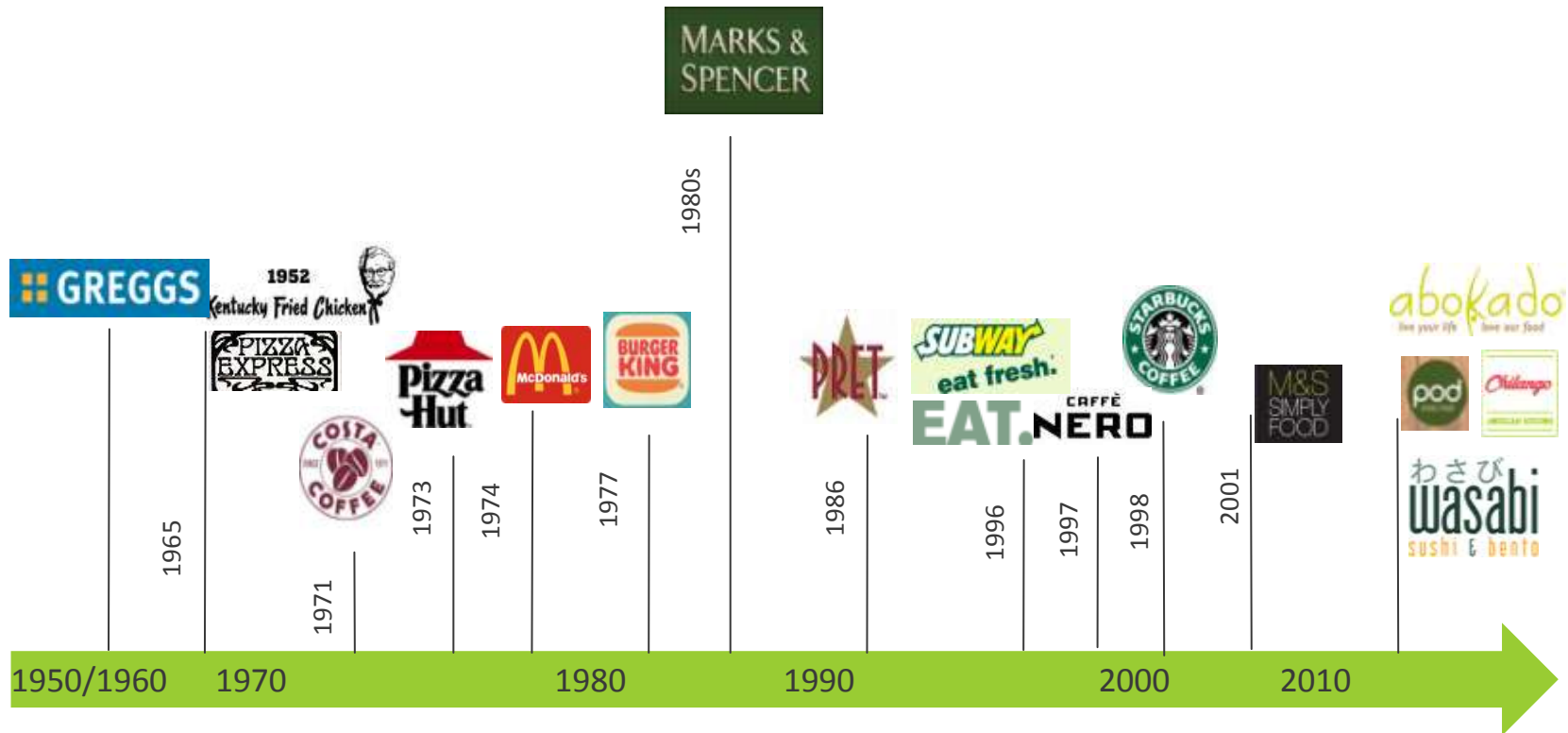
### Lunch at Home



**8%**  
value share  
£1.24bn

# Evolution of Lunch Market

## ■ Consumers' breadth of choice



# Current Consumer Lunch Habits

- Workers do the following for lunch at least once a week...

**Packed lunch**



**70% of consumers**

**Shop/supermarket**



**37% of consumers**

**Workplace restaurant**

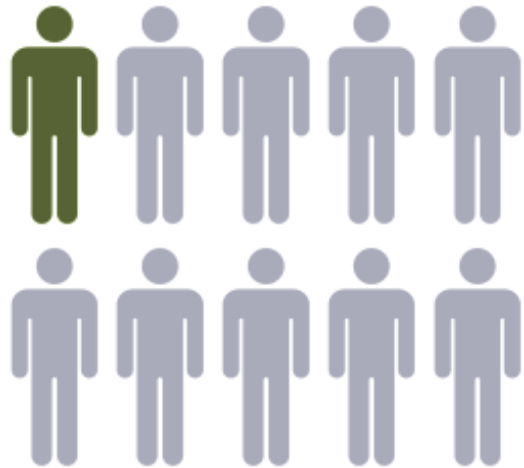


**28% of consumers**

# Skipping Lunch!

■ Skip at least once a week

■ Reasons for skipping lunch



1	Too busy with work/Lack of time
2	Not hungry
3	Too many personal tasks
4	To save time/Leave early
5	To save money

# Favourite Lunch Foods

## ■ Favourite lunchtime foods





# Lunch Trends



Service Speed



Price Consciousness



Exciting On-Trend Concepts



Consumer Facing Technology



Hot & Handheld



Healthier Eating



Menu Labelling



Free-From Products

# Future Trends in the Lunch at Work Market



Longer working lives



Worker well being



Reduced skipped lunches



Informal lunch environment



Smartphone and tablets

# Summary

- Total value of the Lunch at Work market is £15.86bn in 2011, predicted to grow to £16.10bn in 2012
- Largest proportion of lunch consumed at work is packed lunch, with 70% of workers bringing in a packed lunch at least once a week
- One in two office workers regularly consume lunch at their desk
- One in ten workers skip lunch at least once a week
- Lunch is key to productivity – 60% of workers agree they are less productive in the afternoon if lunch is skipped



Please click [here](#) for a detailed summary of the Sodexo Lunch at Work 2012 report.