



A New Landscape of Eating

Highlights from The Hartman Group's 2022 Eating Occasions Report

Published February 2023

METHODOLOGY:

The Hartman Group’s Eating Occasions Compass

THG’s Compass: Exploring the context, needs and behaviors associated with eating and drinking occasions

The Hartman Group’s Eating Occasions Compass uses a powerful online recall methodology that randomly selects two eating or drinking occasions that a consumer participant has had in the past 24 hours. This unique method allows us to access respondents very close to their eating occasions for optimal recall of information.

The database includes daypart, location, social composition, and need states as well as items consumed and broadly when and where items were acquired. The Hartman Group has been consistently fielding the survey since 2012 and has now captured over 190,000 adult eating occasions.

The respondent sample is nationally representative of the U.S. general adult population. These respondents recall eating occasions distributed across days of the week, leading to an occasion sample reflecting all U.S. adult occasions.

2022 Eating Occasions Sample & Fielding Dates

Fielded as 3 annual waves among U.S. adults aged 18–76, nationally representative sample (balanced by age, gender, region, education, income, number of children, and race/ethnicity):

– 2022 fielded:	May 2022 July-August 2022 October 2022	} n=13,696 Total Occasions
– 2021 fielded:	May 2021 July-August 2021 October 2021	} n=14,138 Total Occasions
– 2020 fielded:	April 2020 July-August 2020 October 2020	} n=13,318 Total Occasions
– 2019 fielded:	May-June 2019 July-August 2019 October 2019	} n=14,319 Total Occasions

* Survey sampling error at 95% confidence level



Want to know more?

Purchase the full 73-page report, A New Landscape of Eating: 2022 Eating Occasions, via The Hartman Group’s website, <https://www.hartman-group.com>.

Note that The Hartman Group’s Eating Occasions Compass also captures self-reported teen occasions (aged 13-17) and parent-reported child occasions (under 13 years of age). If you would like more information around children and teen occasions or a more in-depth report specific to your category or business objectives, please reach out to Shelly Balanko, Senior Vice President, at shelley@hartman-group.com

INTRODUCTION:

The landscape of eating has fundamentally changed

Over the past few years, we have witnessed a whirlwind of changes in how Americans eat. Upended initially by the COVID-19 pandemic, eating and drinking occasions are continuing to evolve due to changes in where we work or go to school, pressing concerns about inflation and supply chain issues, shifting health and wellness priorities, and a heightened awareness of sustainability.

Every indication thus far is that we, as a society, are not returning to how things were before the pandemic. While we cannot predict the future, eating and drinking occasions in 2022 appear to be stabilizing at a different equilibrium, and decision makers in the food and beverage industry would be wise to recognize that there is no “going back to normal.”

Taking a broad, high-level look at eating and drinking occasions, the following excerpt of the full report, *A New Landscape of Eating*, highlights key shifts among total U.S. adult eating and drinking behaviors in 2022 when compared to 2021 and/or previous years.

Please reach out to purchase the full 73-page report, which also includes more in-depth analysis on:

- Key differences between generational cohorts and dayparts
- Emotional context, important food and beverage attributes, and need states
- Snacking vs. meal occasions
- Sourcing, including restaurant selection criteria, trip types, purchasing time frames, and food retail channels
- Spotlight on price sensitive occasions focusing on key differences between these and total occasions, along with key shifts in social context, sourcing behaviors, and consumer attitudes
- 8 sets of daypart dashboards: early morning snack, breakfast, morning snack, lunch, afternoon snack, dinner, after dinner snack, and late-night meal/snack; all dashboards include the size of the occasion, who was present, where it took place, what was consumed, where it was sourced, need states, and demographics

79%

of U.S. employees with remote-capable jobs were working exclusively remote (26%) or hybrid (53%) as of November 2022¹

82%

of shoppers who observed price increases in 2022 made adjustments to how they shopped for groceries to accommodate for this²

42%

of consumers said their overall diet was healthier in the summer of 2022 when compared to the previous year³

28%

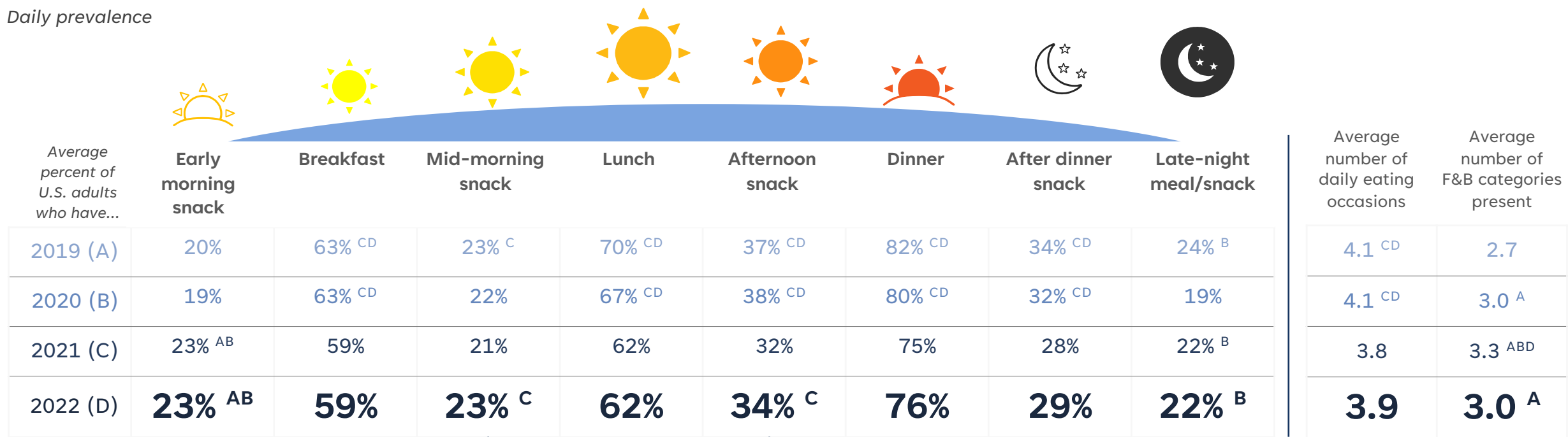
of consumers say they consistently base their purchasing decisions on sustainability concerns⁴
(+5pp from 2019, +12pp from 2007)

Eating occasions have become slightly more evenly spread out throughout the day, shifting consumption away from mealtimes

The decline in meal occasions witnessed in 2021 persisted in 2022, as consumers have shifted to more frequent snacks, with fewer items per occasion. The slight increase in mid-morning and afternoon snack consumption appears to influence the number of food and beverage categories present on any given occasion, which has dropped significantly from 2021. These subtle shifts add up to eating occasions being slightly more spread out across the day. However, the total number of eatings throughout the day remains similar to 2021 and below both 2019 and 2020 levels.

EATING OCCASIONS BY DAYPART 2019-2022

Daily prevalence



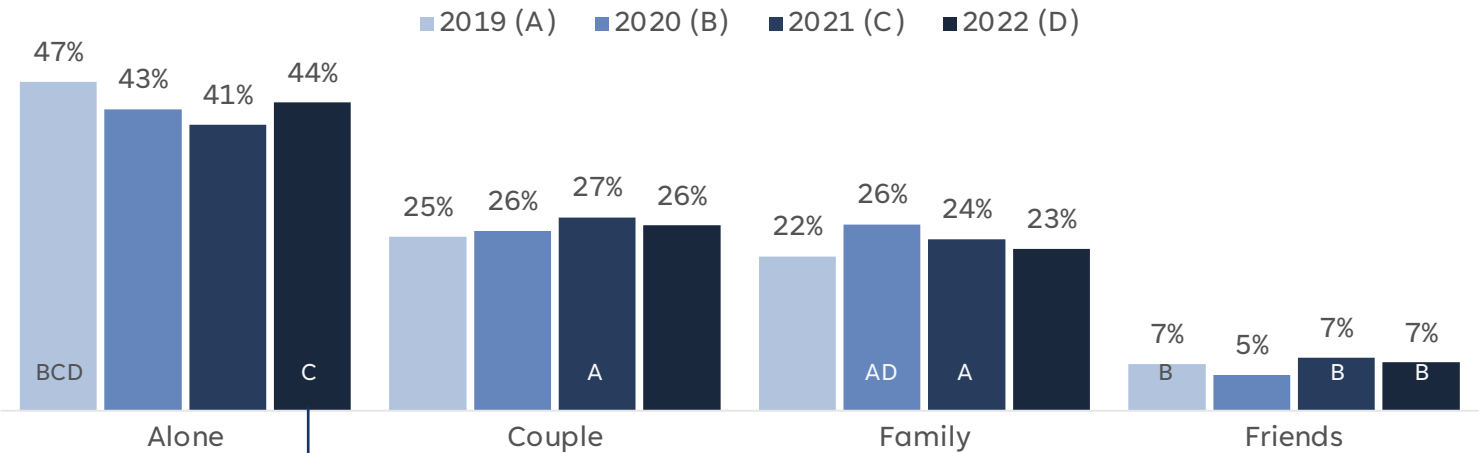
Participation in both mid-morning and afternoon snacking occasions is higher among Gen Z adults and Millennials

Capital letters represent statistically significant differences between years at the 95% CL.
Source: THG Compass Eating Occasions Database 2019-2022, Adults 18-73. Trended Respondent Base: 2022 n=8,447; 2021 n=8,691; 2020 n=7,138; 2019 n=7,662. Trended Occasions Base: 2022 n=13,107; 2021 n=14,138; 2020 n=13,318; 2019 n=14,319. 2022 Respondent Base: Gen Z n=835; Millennials n=2,309. 2022 Occasions Base: Gen Z n=1,158; Millennials n=3,328.

Alone eating has increased since 2021 after a large drop during the first two years of the pandemic

During the height of the pandemic, in 2020 and 2021, there was a decline in alone eating as more consumers were working or schooling at home, often alongside others. In 2022, alone eating increased, yet not to the levels witnessed in 2019, prior to the pandemic.

WHO WAS PRESENT
Among total occasions, 2019-2022



Millennial occasions are least likely to take place alone, at 36% in 2022

Capital letters represent statistically significant differences between years at the 95% CL.
Source: THG Compass Eating Occasions Database 2019-2022, Adults 18-73. Base: Total Trended Occasions 2022 n=13,107; 2021 n=14,138; 2020 n=13,318; 2019 n=14,319.
Trended Occasions By Generation: Gen Z 2022 n=1,158, 2021 n=1,489, 2020 n=983, 2019 n=691; Millennials 2022 n=3,328.

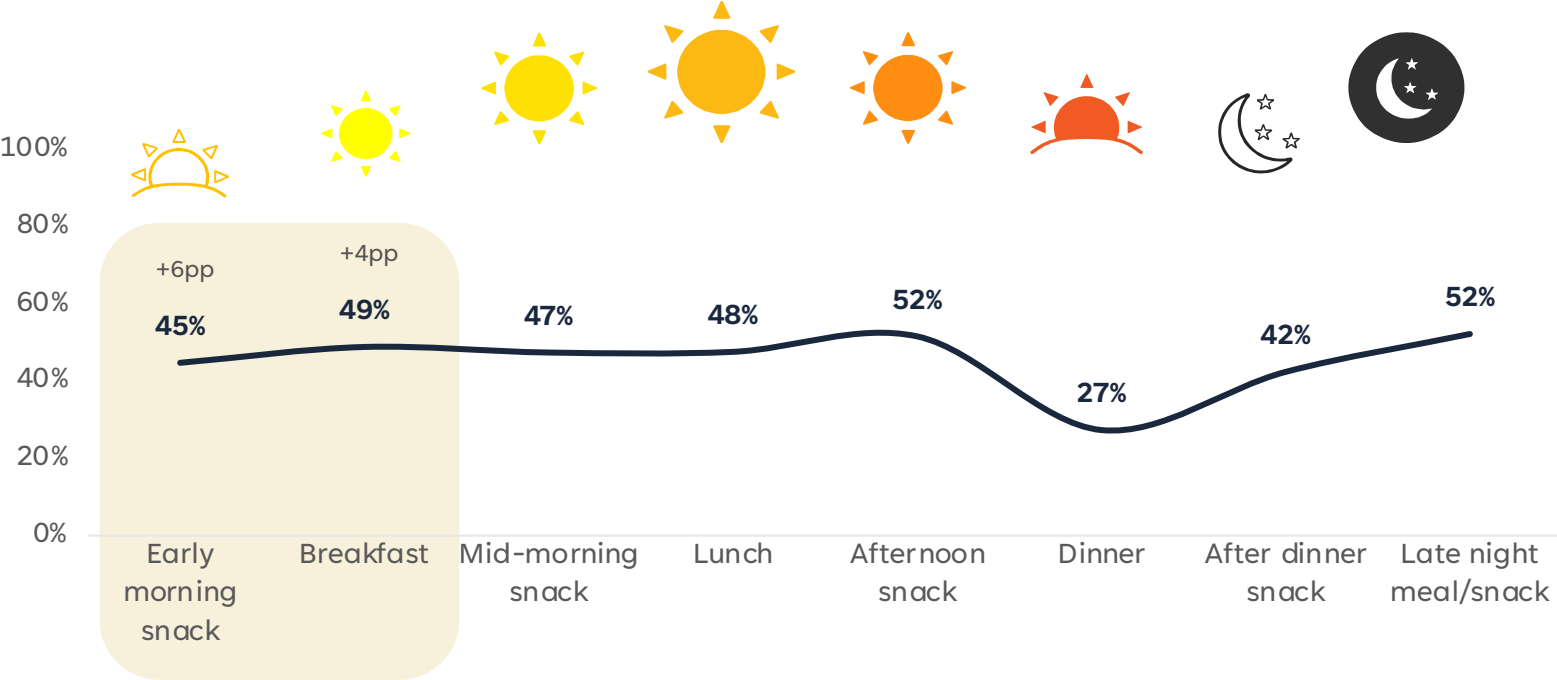


The increase in alone eating is most prominent in the early morning

As some consumers return to pre-pandemic routines of commuting and in-person work (or some form of hybrid work), the share of morning occasions that take place alone has increased significantly. As in previous years, alone eating is lowest during dinner, which is by far the most social eating occasion.

ALONE OCCASIONS BY DAYPART

As a % of each daypart, trended to 2021



Source: THG Compass Eating Occasions Database 2021-2022, Adults 18-75. Base: Early Morning Snack 2022 n=1,241, 2021 n=1,475; Breakfast 2022 n=2,268, 2021 n=2,977; Morning Snack 2022 n=835, 2021 n=956; Lunch 2022 n=2,415, 2021 n=2,930; Afternoon Snack 2022 n=899, 2021 n=915; Dinner 2022 n=4,599, 2021 n=3,901; After Dinner Snack 2022 n=475, 2021 n=495; Late-night Meal/Snack 2022 n=808, n=1,005.

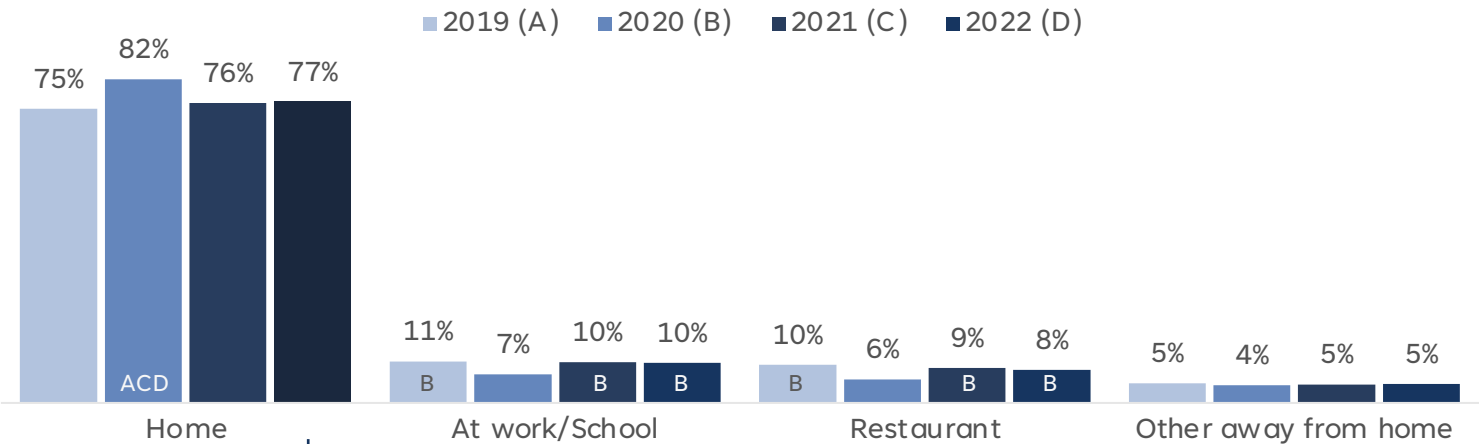


The location of where consumers eat has remained relatively stable since 2021

With the exception of 2020, when many opted to stay at home to avoid contracting COVID-19, where consumers eat has remained fairly consistent. However, there are differences between generations.

LOCATION OF EATING OCCASION

Among total occasions, 2019-2022



Gen Z adult and Millennial occasions are least likely to take place at home, at 70% and 68% respectively, in 2022

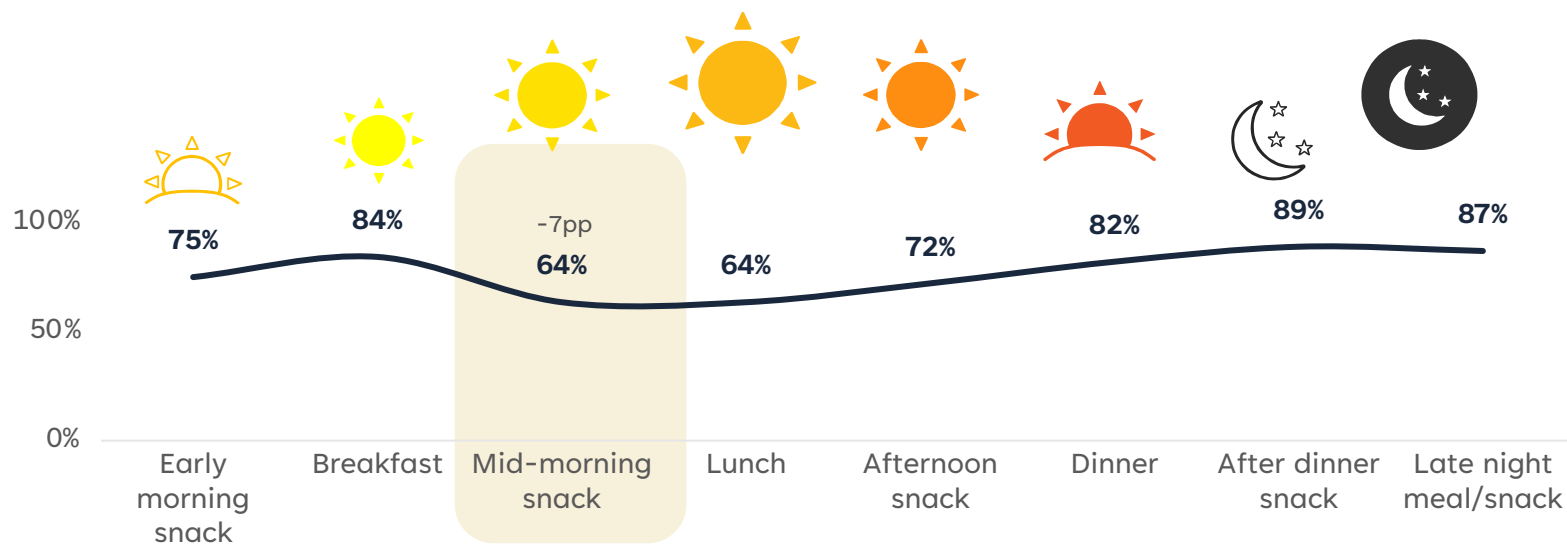
Capital letters represent statistically significant differences between years at the 95% CL.
Source: THG Compass Eating Occasions Database 2019-2022, Adults 18-73. Base: Total Trended Occasions 2022 n=13,107; 2021 n=14,138; 2020 n=13,318; 2019 n=14,319.
Trended Occasions By Generation: Gen Z 2022 n=1,158, Millennials 2022 n=3,328.



However, at-home eating during the mid-morning snack occasion has declined

From 2021 to 2022, alongside the increased participation in mid-morning snack occasions (as shown on slide 4), there was a significant shift in where these occasions took place, from at-home (-7pp) to at work or school (+7pp). This is unsurprising, given the shift to in-office work for many in 2022 from a previously remote situation. But when juxtaposed with the lack of changes in location on lunch occasions, along with the lower participation rates compared to 2019 and 2020, it suggests that some consumers may be foregoing the traditional “work lunch” of the pre-pandemic era in favor of mid-morning and afternoon snacking.

EATING AT HOME BY DAYPART
As a % of each daypart, trended to 2021



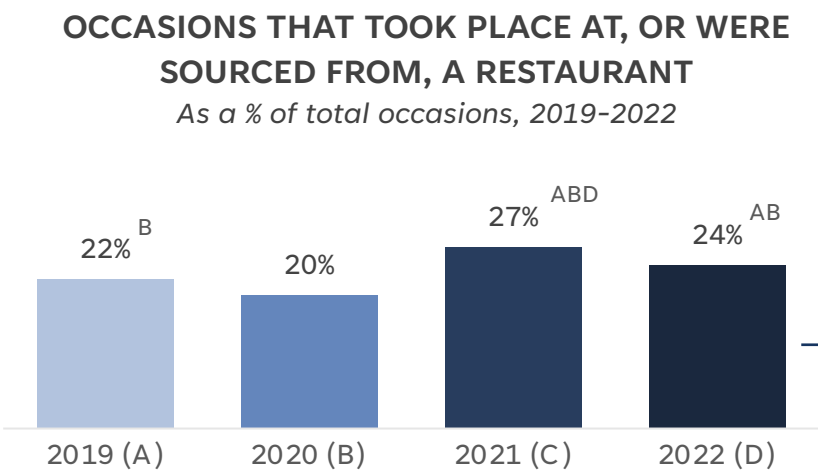
Source: THG Compass Eating Occasions Database 2021-2022, Adults 18-75. Base: Early Morning Snack 2022 n=1,241, 2021 n=1,475; Breakfast 2022 n=2,268, 2021 n=2,977; Morning Snack 2022 n=835, 2021 n=956; Lunch 2022 n=2,415, 2021 n=2,930; Afternoon Snack 2022 n=899, 2021 n=915; Dinner 2022 n=4,599, 2021 n=3,901; After Dinner Snack 2022 n=475, 2021 n=495; Late-night Meal/Snack 2022 n=808, n=1,005.



Restaurant sourcing appears to be leveling off after peaking in 2021

Restaurant-sourced occasions in 2022 account for 24% of all eating and drinking occasions, fulfilling a variety of needs, most often around convenience and flavor.

In 2020, restaurant-sourced occasions (including takeout/delivery) dropped due to stay-at-home orders and restaurant closures during the beginning of the pandemic. However, in 2021, restaurant sourcing increased dramatically, perhaps as many experienced a pent-up demand after avoiding restaurants the year prior. In 2022, restaurant sourcing has declined, yet is still higher than pre-pandemic levels.



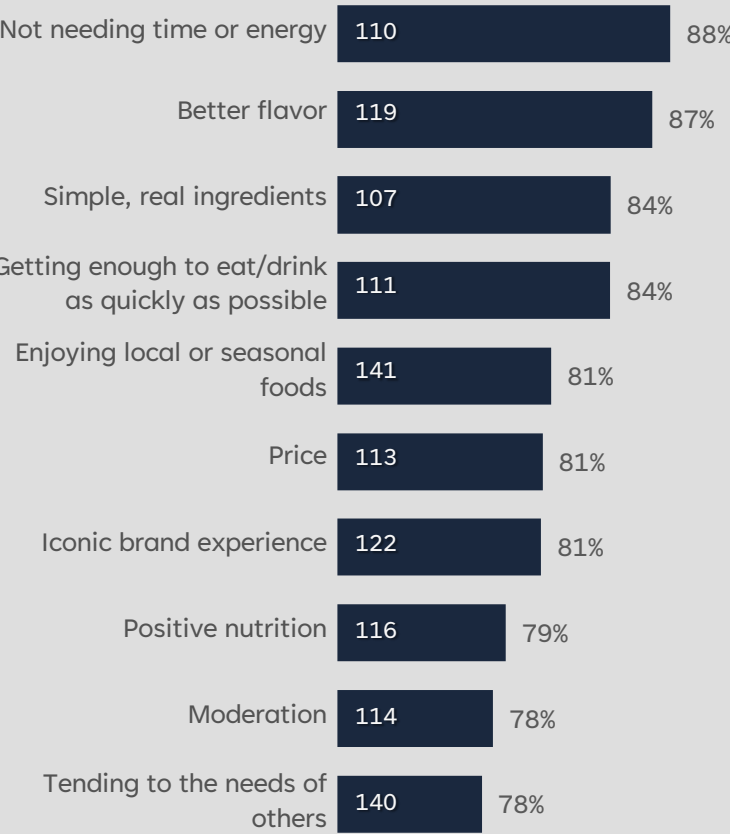
Millennials have the largest share of restaurant-sourced occasions among generations, at 34% in 2022

Capital letters represent statistically significant differences between years at the 95% CL.
Source: THG Compass Eating Occasions Database 2019-2022, Adults 18-73. Base: Total Trended Occasions 2022 n=13,107; 2021 n=14,138; 2020 n=13,318; 2019 n=14,319. Adults 18-76 2022 Occasions. Base: Total Occasions 2022 n=13,696; Gen Z n=1,158, Millennials 3,328, Gen X n=3,666, Boomers n=5,544, Parents n=1,783, Non-Parent n=11,913, High Income (>\$75K) n=5,099, Mid-Income (\$40K-\$74,999) n=3,620, Low-Income (<\$40K) n=4,977; Restaurant-Sourced Occasions 2022 n=2,746.



Top 10 Needs on Restaurant-Sourced Occasions

Top-3-box considerations, indexed to total occasions

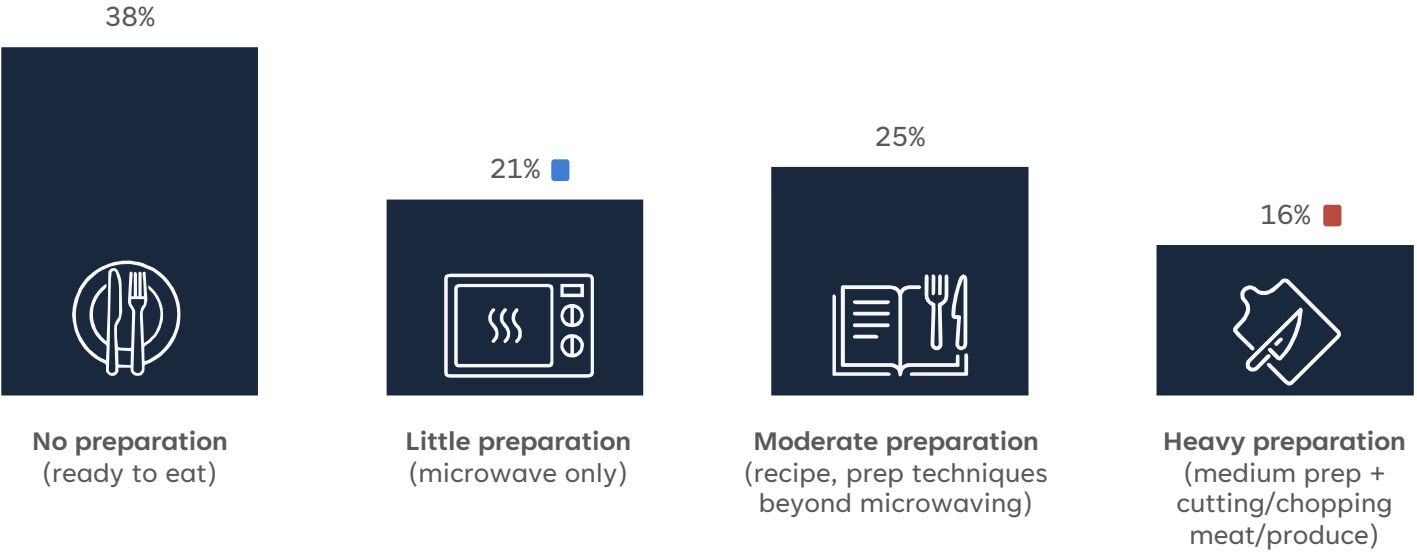


When consumers choose to cook, the degree of preparation remains similar to 2021 levels

When consumers aren't sourcing from a restaurant, about 4 in 10 occasions involve a moderate to heavy amount of preparation. Millennials tend to have higher levels of cooking engagement when they do decide to cook, and they tend to use a variety of preparation methods. On the other hand, Boomers are more likely to use lower levels of preparation when cooking.

DEGREE OF PREPARATION

*Excludes occasions that were prepared by someone else and those sourced from/at a restaurant,
No significant shifts from 2021*



Source: THG Compass Eating Occasions Database 2021-2022, Adults 18-75. Base: Trended Occasions Not From/At Restaurant 2022 n=9,549, 2021 n=9,970; Gen Z 2022 n=660, Millennials 2022 n=1,904, Gen X 2022 n=2,722, Boomers 2022 n=4,263. Trended Occasions That Involved Heating/Cooking 2022 n=4,443, 2021 n=4,531; Gen Z 2022 n=298, Millennials 2022 n=881, Gen X 2022 n=1,326, Boomers 2022 n=1,938.

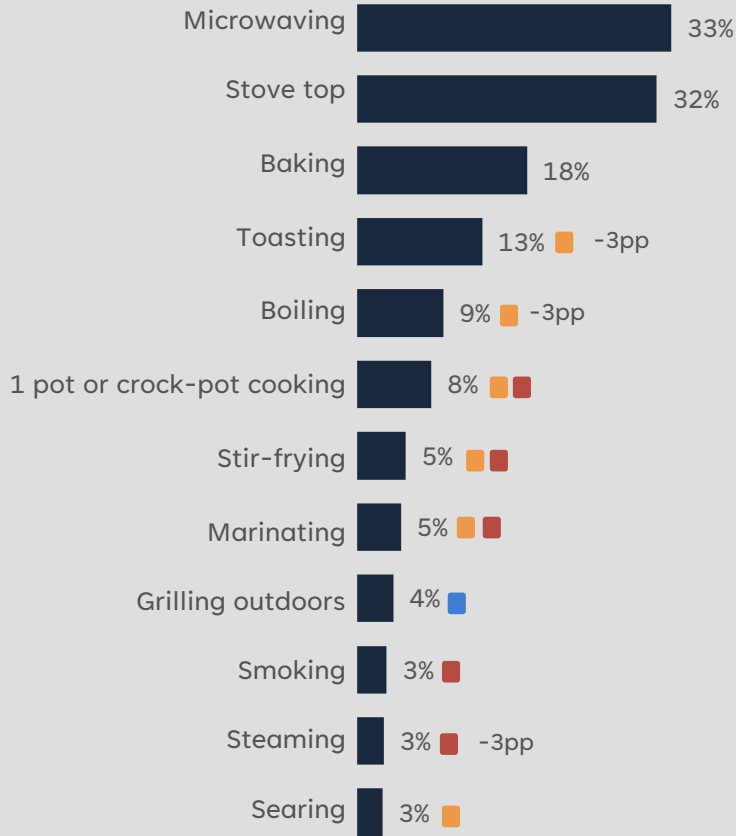
Over-indexes 120+ among:

- Gen Z
- Millennials
- Gen X
- Boomers



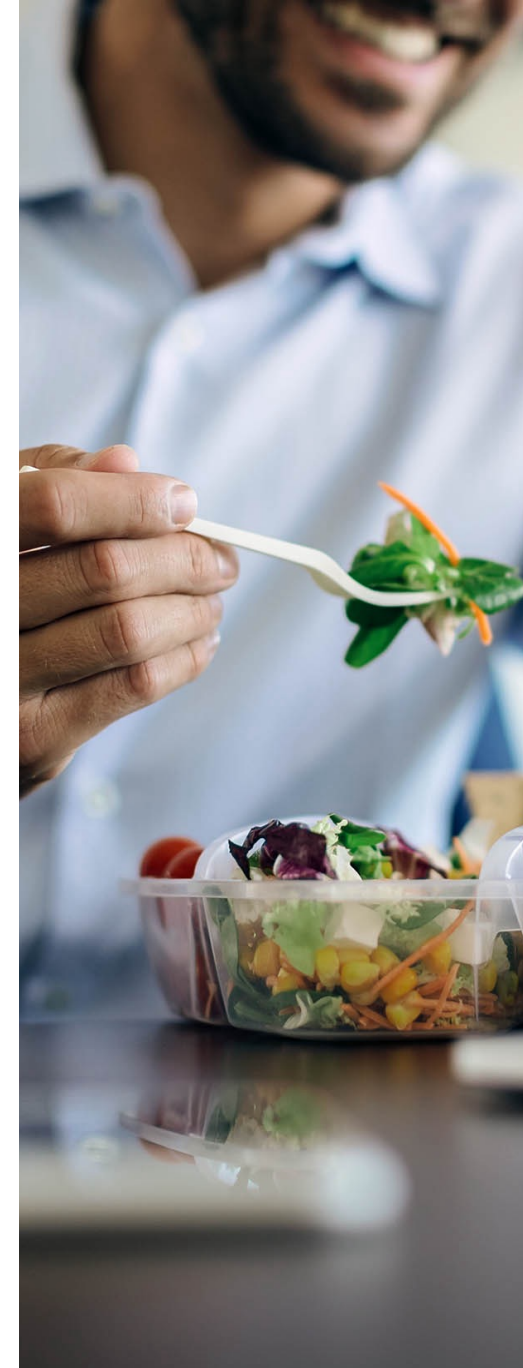
Top Preparation Methods

Among occasions that involved heating/cooking, trended to 2021



5 Key Takeaways & Implications

- 1 The landscape of eating has fundamentally changed.** Higher levels of participation in mid-morning and afternoon snack occasions and lower participation levels at lunch and dinner are illustrative of how eating behaviors are not returning to a “normal” pre-pandemic state.
 - Higher participation rates among Gen Z and Millennials suggest that the slight increase in mid-morning and afternoon snacking occasions may continue. Brands should be asking the question: *how can we capture an increased share of these occasions by catering to the unique set of consumer needs associated with each of these dayparts?*
- 2 The social context of eating continues to shift.** Alone eating increased in 2022 after reaching its lowest level in 2021, yet this increase was concentrated in the early morning, and alone eating overall remains lower than pre-pandemic levels of 2019. Among generations, alone eating is lowest among Millennials, who are more likely to crave social connections during eating and drinking occasions.
 - When marketing towards Millennial eating occasions, focus on ways in which your brand/restaurant/retail products can create a more engaging social eating experience. This can be reflected as a premium convenience play to allow for connection rather than cooking.
- 3 Mid-morning snack occasions are more often taking place at work.** While this shift on its own may be unsurprising given the return to in-person work (at least part of the time), when considered alongside the lack of location change during lunch, this suggests that some consumers may be foregoing the traditional “work lunch” of the pre-pandemic era in favor of mid-morning or afternoon snacking.
 - Mid-morning snacks are often hurried occasions, focused on satiety, satisfying thirst and physical replenishment. Convenient, ready-to-eat/drink formats that can be easily consumed at work, on-the-go, or at home are especially important for brands to consider when appealing to the mid-morning snack occasion.
- 4 After peaking in 2021, the share of restaurant-sourced occasions appears to be leveling off.** Restaurant-sourced occasions are, however, still above 2019 levels, and continue to play an important role in how Americans eat.
 - It is important for food service establishments to cater to key consumer needs when sourcing from restaurants, including convenience, flavor distinction, and real ingredients that cue freshness via seasonal and local distinctions.
- 5 Cooking engagement remains stable yet varies by generation.** Boomers are more inclined to use light amounts of preparation when cooking, while Millennials are more engaged, often opting for higher degrees of preparation when they are not outsourcing from a restaurant.
 - Format and level of preparation matters. If your core audience is older, it is important to take into consideration their preference for lighter engagement with options that involve fewer and simple steps. For younger audiences, recipes that utilize various modern kitchen appliances and cooking techniques will likely appeal.



Ways to engage with The Hartman Group's proprietary Compass Eating Occasions Database



1 Occasions-Focused Reports

Purchase special reports that explore the context, needs and behaviors associated with eating and drinking occasions, and answering the question: How do Americans eat?

Previous reports include:

- COVID-19's Impact on Eating 2020
- Redefining Normal 2021
- Shifting Food Habits & Routines 2021
- Eating Occasions Dashboards (2020-2022)

Reports are occasion-focused and incorporate Hartman's unique perspectives to help those in the food and beverage industry connect to cultural changes occurring in the U.S.

Stay tuned for additional special reports to be released in 2023.



2 Custom Occasions Analysis

Leverage Compass's robust insights to answer questions specific to your business, including (but not limited to):

- Cultural drivers for your portfolio (e.g., need states specific to your food/beverage category)
- Eating occasions among your target demographic group(s)
- Food and beverage adjacencies, pairings (including sauces, condiments, seasonings)
- Packaging/format implications (related to who is present on the occasion and how food is prepared/consumed)
- Channel strategy/competition
- Implications associated with planning horizons and purchasing time frames (e.g., immediate consumption vs. stock-up)



3 Hartman Retainer Services: Compass Package

A customized subscription service designed for your specific needs. Packages include your choice of The Hartman Group's syndicated studies, trends reports and eating occasions publications, plus access to our analytics team for consultations. Through this partnership, we connect you to a deep well of data, insights and strategy.

In addition, utilize consulting hours to gain access to Hartman's proprietary Eating Occasions database via custom data cuts and reports. Packages start at 50 consulting hours.

To learn more about how you can utilize The Hartman Group's Eating Occasions Compass to address your specific needs, please reach out to Shelley Balanko, Senior Vice President:

shelley@hartman-group.com



ABOUT THE HARTMAN GROUP

The Hartman Group is the premier food and beverage consultancy in the world. Companies and brands across all segments of the food and beverage industry benefit from our unparalleled depth of knowledge on consumers, culture, trends, and demand-side market strategy. We listen closely to understand our clients' business challenges and tailor solutions that deliver transformative results. Through a unique suite of integrated custom, primary research capabilities, market analytics, and business strategy services, we uncover opportunity spaces and avenues for growth. We deliver more compelling insights that fuel inspiration and ideas for innovation.

3150 Richards Road, Ste. 200 Bellevue, WA 98005

Tel (425) 452 0818 Fax (425) 452 9092

www.hartman-group.com