



DISCOVER OPPORTUNITIES BY EXPLORING CONSUMPTION BEHAVIORS

# HARTMAN EATING OCCASIONS COMPASS

ADVANCED FOOD & BEVERAGE ANALYTICS

hartman  
GROUP







## DISCOVER OPPORTUNITIES BY EXPLORING CONSUMPTION BEHAVIORS

**The what, where, when, with whom and why of consumers' eating and drinking behaviors is rapidly changing. How can you keep track of America's ever-changing and evolving eating and drinking habits?**

Cultural imagery is a very sticky thing. Mention the word “dinner,” and our mind envisions a set of people gathered around a table. The words “family dinner” narrow that vision onto a mom, a dad and usually two or more kids. Mention the word “snack” in a focus group setting, and most people begin talking about a child’s after-school snack or munching on chips while watching TV.

But given the dynamic change in American culture (in general) and our eating culture (specifically), these cultural stereotypes have all but lost any relevance they once had.

The what, where, when, with whom and why of consumers’ eating and drinking behaviors is rapidly changing.

To really grasp this profound change in America’s eating behaviors and practices, we need to think very differently about our study of consumers. After years of research, The Hartman Group’s own in-house social scientists found that these behaviors can be best understood at the level of **occasions**.

What makes our study of eating occasions unique is that we ground it in the world of food culture, the context within which consumers make sense of all food matters.



### How Do Americans Eat?

The Hartman Eating Occasions Compass resource was built to fill an unmet information need, providing foundational numbers and insights while correcting for an otherwise distorted or obscured picture of food consumption and market opportunities.

The outcome of our cultural research was the development of a proprietary database, the **Hartman Eating Occasions Compass**, which tracks thousands of eating occasions.

The dynamics of food culture and changing demographics in the U.S. heavily influence consumers' shopping and eating behaviors. Eating occasions emerge from the way consumers live and are what give meaning and context to the way they shop.

The Hartman Group's proprietary Eating Occasions Compass is a dynamic database and analytics tool that tracks consumers' current and shifting eating and drinking behaviors. It provides precise data, vital information and penetrating insights as a foundational platform from which you can identify opportunity spaces and fine-tune strategic planning and direction.

### Hartman Eating Occasions Compass: Proprietary Approach

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

- Includes daypart, location, social composition, items consumed and broadly when/where items were acquired.
- Unique to the database is The Hartman Group's proprietary distinction between Instrumental (functional) and Savoring (enjoyment) eating occasions, aligning with lower-level need states grounded in food culture.



## Eating Occasions

A **UNIFIED** (sourcing agnostic), consumer **CULTURE**-centric, **CONSUMPTION**-centric picture should underlie sector, category and brand dynamics and inform opportunities.

### Hartman Eating Occasions Compass: Database Overview

Fielded three times annually since 2011. The respondent sample is nationally representative of the U.S. general adult population balanced against all major demographics, who participate in and recall eating events distributed across seasons and days of week, leading to an occasion sample reflecting all U.S. adult eating and drinking occasions.

**Survey updated:** three times annually (Spring, Summer, Autumn)

**Respondents:** 62,000 (covering 2012–2016)

**Occasions:** 102,000 adult eating occasions, plus additional 13,000 child eating occasions. Starting in 2016, teen (13-17 years old) eating occasions have been captured so we can deep dive how this emerging consumer group eats.

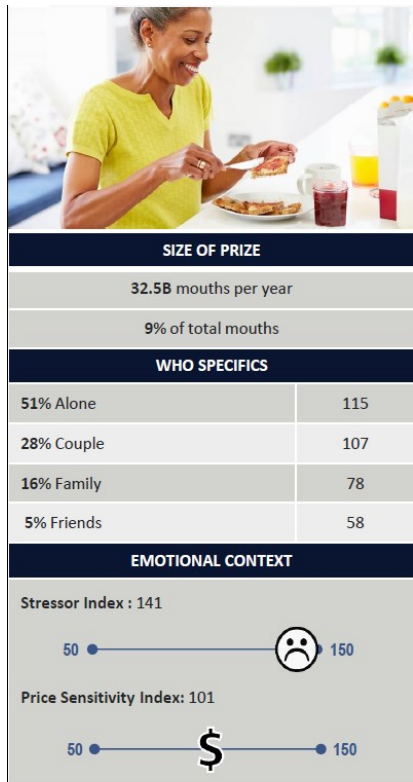
**Categories:** 300+ food and beverage (including alcohol) categories tracked

#### Key variables:

- **When:** 8 major dayparts tracked
- **Where (location):** 4 major locations (at home, restaurant, work/school, on the go)
- **Who (person or persons involved):** 5 major classifications (respondent-centric: alone, couple, family, friends; child-centric: all)
- **Sourcing from retail:** past-3-month retail banner shopping incidence for more than 40 national and regional retailers
- **Sourcing from food service/restaurants:** 25 major national chains tracked

Compass Data Can  
Populate “Dashboards”

The database allows us to define the occasion in a number of different but equally valid ways. For example, it is possible to construct an occasion based upon one or more need/emotional states.



Source: HOBM Compass, 2016 (n=2,039 adult eatings)

Eating Occasions: Painting a More Complete Picture

The Hartman Compass goes beyond demographic and standard food diary questions.

With over 1,500 potential questions, the Hartman Compass captures a unified, comprehensive picture of food occasions across the entirety of eating.

Consumer motivations for food occasions are identified, allowing us to understand the emotional need states that drive food consumption decisions at the food-occasion level.

Our survey is designed to enumerate past 24-hour eating occasions and collect the details of (up to) two selected occasions at random.

- Beverage-only occasions are also counted.
- The survey does not collect brand-level data.
- Foods/Beverages consumed on an occasion are not treated separately for purposes of identifying the dominant motivations and attitudes.
  - Thus, for example, if a respondent had a hamburger and French fries for lunch, they are not asked to explain separately their reasons for choosing the hamburger and their reasons for having the French fries. The survey design implicitly assumes that such reasons operate primarily at the level of the occasion rather than individual products.
- Parents are asked about a randomly selected eating from a randomly selected child, among eatings whose needs they believe they can describe.



# Hartman Eating Occasions Compass. **Advanced Food & Beverage Analytics**

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## How to Access the Compass Database

Accessing data, insights and strategic analysis on consumption habits, developed and emerging categories, dayparts, channels and more can be done in one of three ways:

- **À La Carte On Request.** An à la carte request is a directional resource that combines deep data mining with strong business analytics. It is a quick and easy way to obtain answers to the questions that help connect your marketing and communications, product development and more with what consumers are doing.
- **Hartman Retainer Services Subscription.** Hartman Retainer Services (HRS) is a customized annual subscription service that provides access to all of The Hartman Group's nonproprietary reports and publications plus access to our analytics team for consultations. Via this partnership, we connect you to a deep well of data, insights, strategy and the world of food and beverage occasions. This resource provides all-inclusive capabilities and services of the Hartman Eating Occasions Compass.
- **Qualitative Deep Dive.** When you need to get behind the numbers to truly understand the why behind the buy, then a qualitative exploration into the occasion or category is the answer. The Hartman Group's team of seasoned, savvy ethnographers help you fully understand the eating occasion. The outcome is a unique food-culture perspective that is in sync with your business challenges and needs.

## Cost

Accessing the Hartman Eating Occasions Compass is fee-based. Because services are custom-tailored at each level, costs are quoted based on scope of each request. Contact us with your request.

## Capabilities

The Hartman Group's anthropologists, social scientists and business analysts have been immersed in a 25-year-long study of American food and beverage culture using ethnographic observation, quantitative tracking surveys and deep study of food and beverage trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, thereby identifying unique opportunities and winning strategies for our clients.

## Contact

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