

hartman
GROUP



DISCOVER OPPORTUNITIES BY EXPLORING CONSUMPTION BEHAVIORS

HARTMAN EATING OCCASIONS COMPASS

ADVANCED FOOD & BEVERAGE ANALYTICS

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?

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 **eating and drinking occasions**.

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

WHAT IS AN EATING OCCASION?

An eating occasion is any time where you eat or drink something, and it includes everything you had at that time. For example, if you go out for lunch and eat salad and pizza and maybe have some water and iced tea to drink, your eating occasion would include all four of those things!

WHY OCCASIONS?

Eating and drinking occasions paint a more complete picture. 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 gives meaning and context to the way they shop.



THE HARTMAN EATING OCCASIONS COMPASS DATABASE

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 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.



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 and beverage occasions across the entirety of eating and drinking.

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

Fielded **three times annually** since 2012. The respondent sample is nationally representative of the U.S. general adult population balanced against all major demographics who participate in and recall events distributed across seasons and days of week, leading to an occasion sample reflecting all U.S. adult occasions

Foods and/or 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.

As of January 2018, the database includes:

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

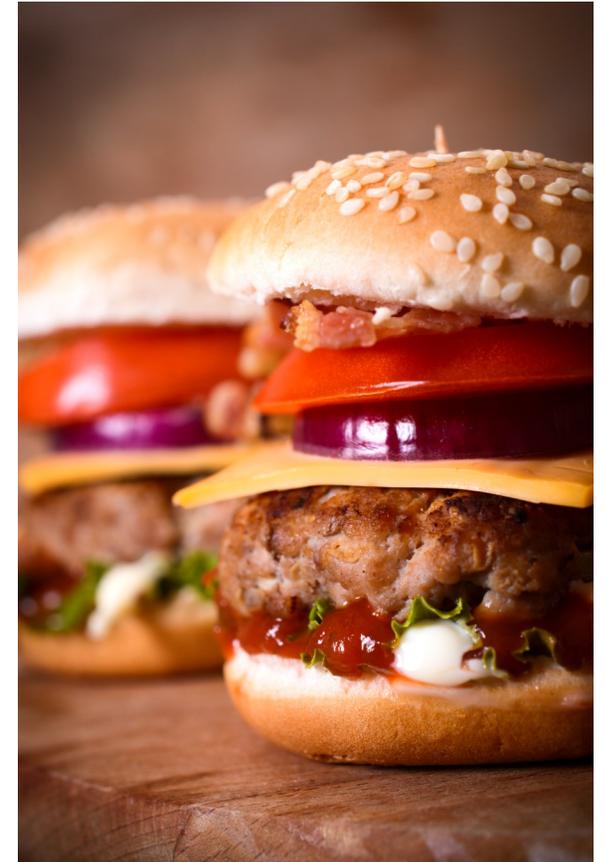
Respondents: 76,000+ adults (covering 2012–2017)

Occasions: 121,000 adult eating occasions plus additional 20,000 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:** more than 40 national and region retail banners tracked based on past-3-month shopping incidences
- **Sourcing from food service/restaurants:** 25 major national chains tracked



WHAT QUESTIONS DOES COMPASS ASK CONSUMERS?

- Over 300 food and beverage categories captured
- Instrumental or savoring
- Need states
- Emotional states
- Price sensitivity
- Satisfaction
- Packaging formats
- Cooking techniques
- Food preparation levels
- Meal planning (e.g., immediate consumption)
- Restaurant eating and sourcing
- Channel sourcing
- Retail banner shopping (e.g., Kroger, Safeway, Whole Foods)
- Was a premium brand consumed?



TYPES OF QUESTIONS TO ASK OF COMPASS

What categories are doing well on which occasions?

How are occasions changing over time?

Which occasions over index for immediate consumption?

What occasions are the least/most price-sensitive?

Which occasions are ripe for new product development?

How much consumer “production” (e.g., planning, shopping, food prep) is going into particular occasions (level of assembly, cooking, reheating, etc.)?

What are the needs states (functional and emotional) on particular occasions that drive usage of specific categories?

Are particular categories used on snack or meal occasions (or both)?

How can your product find new occasions rather than just trying to steal share from competitors?

What are the demographic differences in terms of occasion participation? (e.g., Millennials are driving the late-night meal occasion.)

On which occasions does health and wellness play a role?

Which retail channels are used to source for which occasions? Which food service channels?



HOW TO ACCESS HARTMAN'S EATING OCCASIONS COMPASS

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.

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