

Hartman Group’s Compass Eating & Drinking Occasions Database

Hartman Group’s Compass Database documents the context, needs and behaviors associated with eating and drinking occasions.

Hartman Group’s Compass Eating & Drinking Occasions Database uses a powerful online recall methodology that randomly selects two eating or drinking occasions that a respondent has had in the past 24 hours. Our 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. Hartman Group has been consistently fielding the survey since 2012 and has now captured over 215,000 adult eating occasions.

The respondent sample reflects US adult population demographics. These respondents recall eating occasions distributed across days of the week, leading to an occasion sample reflecting all U.S. adult occasions.

2019–2024 Eating Occasions Sample

Fielded as 3 annual waves (spring, summer and fall) among a national sample (balanced by age, gender, region, education, income, number of children and race/ethnicity) of U.S. adults (ages 18–78). When trending to previous years, the age range used is kept consistent across years. The following base sizes and age ranges are used throughout this report:

Year(s)	Age Range	Sample Size
2024 only	18-78	Total Occasions 2024 n=12,929
2023-2024 trends	18-77	Total Occasions 2024 n=12,870 Total Occasions 2023 n=14,984
2019-2024 trends	18-73	Total Occasions 2024 n=12,319 Total Occasions 2023 n=14,418 Total Occasions 2022 n=13,096 Total Occasions 2021 n=14,110 Total Occasions 2020 n=13,307 Total Occasions 2019 n=14,311



Want to know more?

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

INTRODUCTION

After a few years of fluctuation, eating habits overall appear to be stabilizing

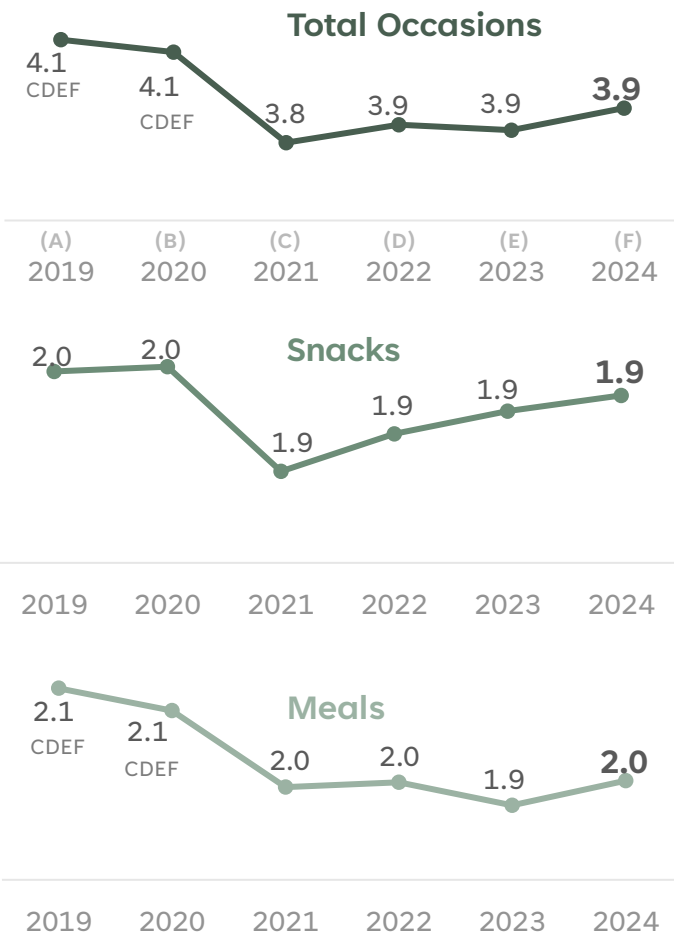
Immediately following the onset of the pandemic, 2021 was clearly a year of disruption in terms of how consumers eat and drink across the day, with large shifts in daytime eating location and social context, limited on-site dining, exploration of cooking and an overall elevation of multiple needs. At the same time (as shown on right), adults also appeared to be consolidating their eating, with fewer occasions across the day, but more food and beverage categories present per occasion.

Since then, habits appear to be stabilizing, yet at slightly different levels when compared to 2019. And today, adults are averaging fewer eating occasions than in 2019 (especially meals), but with a greater diversity of categories present (especially foods).

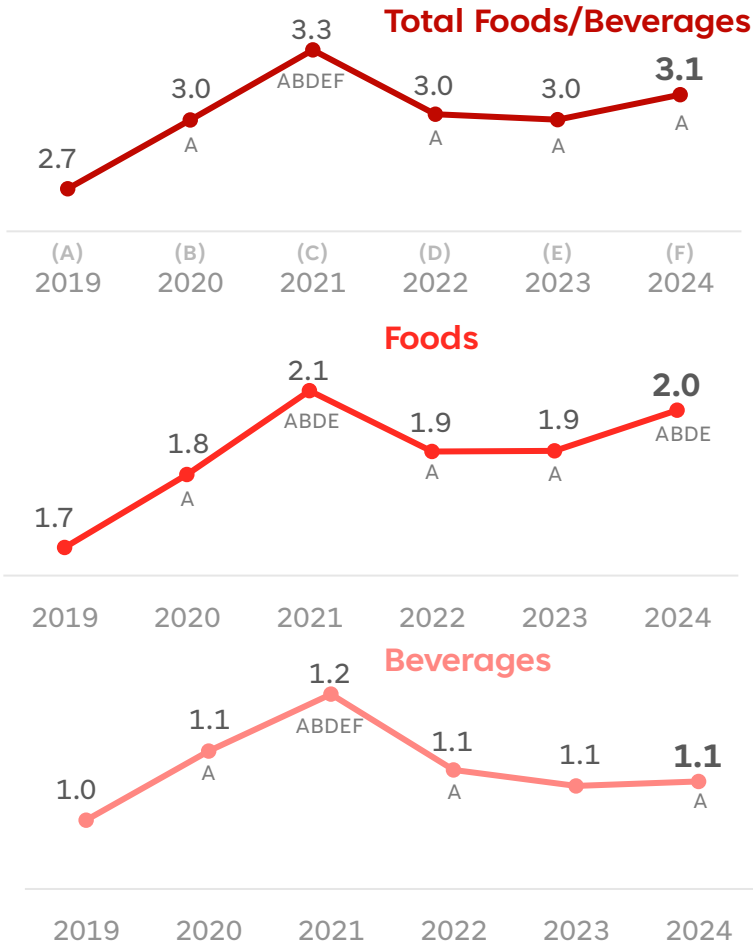
The proportion of snacks vs. meals in 2024 remains similar to the previous year, at 51% meals and 49% snacks (vs. 50% meals and 50% snacks in 2023, no significant change).

Capital letters represent statistically significant differences between years at the 95% CL. Source: Hartman's Compass Eating & Drinking Occasions Database 2019-2024, Adults 18-73. Trended Respondent Base: 2024 n= 6,722, 2023 n=7,992, 2022 n=8,440, 2021 n=8,678, 2020 n=7,136, 2019 n=7,661. Total Trended Occasions: 2024 n=12,319, 2023 n=14,418, 2022 n=13,096, 2021 n=14,110, 2020 n=13,307, 2019 n=14,311. Trended Occasions 2023-2024, Adults 18-77: 2024 n=12,870, 2023 n=14,984.

AVERAGE NUMBER OF DAILY EATING OCCASIONS
Daily average per adult (18-73), 2019-2024



AVERAGE NUMBER OF FOOD & BEVERAGE CATEGORIES PRESENT PER OCCASION
Among total adult (18-73) occasions, 2019-2024



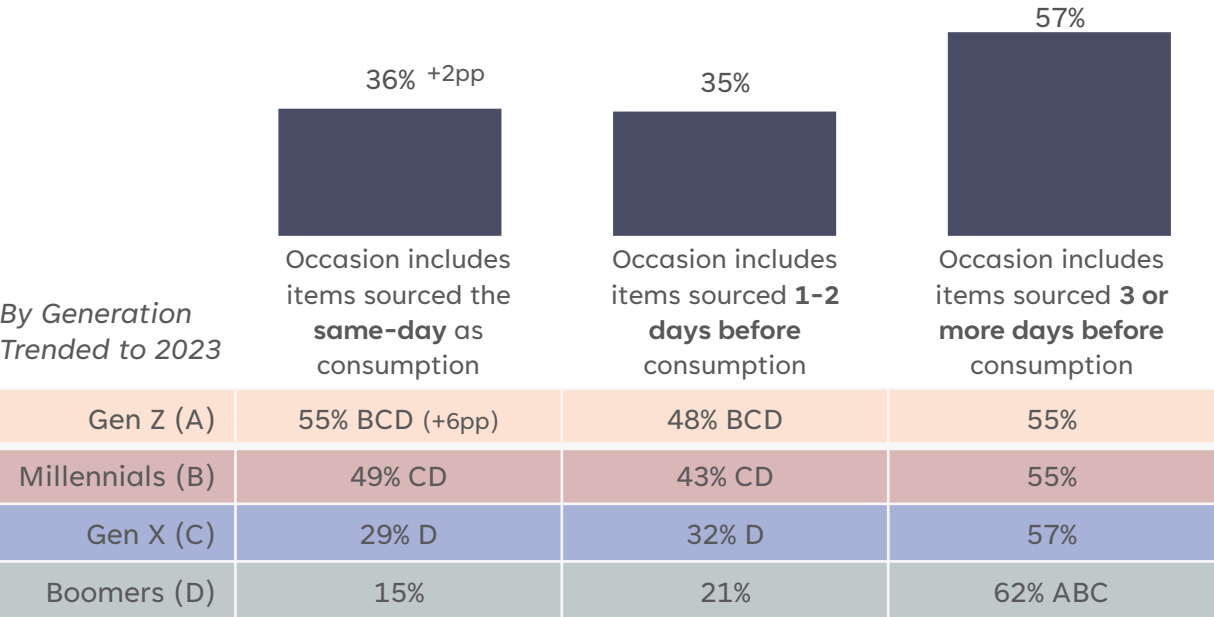
SOURCING

Driven by Gen Z shoppers, same-day sourcing has increased slightly from 2023

Overall, younger generations tend to be more spontaneous than older generations when shopping for food and beverage. For example, Gen Z occasions are equally likely to involve foods and beverages sourced on the same-day as they are to involve those sourced from advanced shopping trips (3+ days prior, both at 55%). Boomer occasions, on the other hand, are much more likely to involve foods and beverages sourced in advance (62% sourced 3+ days prior vs. 15% sourced same day). When compared to 2023, a greater share of 2024 Gen X occasions involved foods and beverages sourced from a pantry stock-up trip.

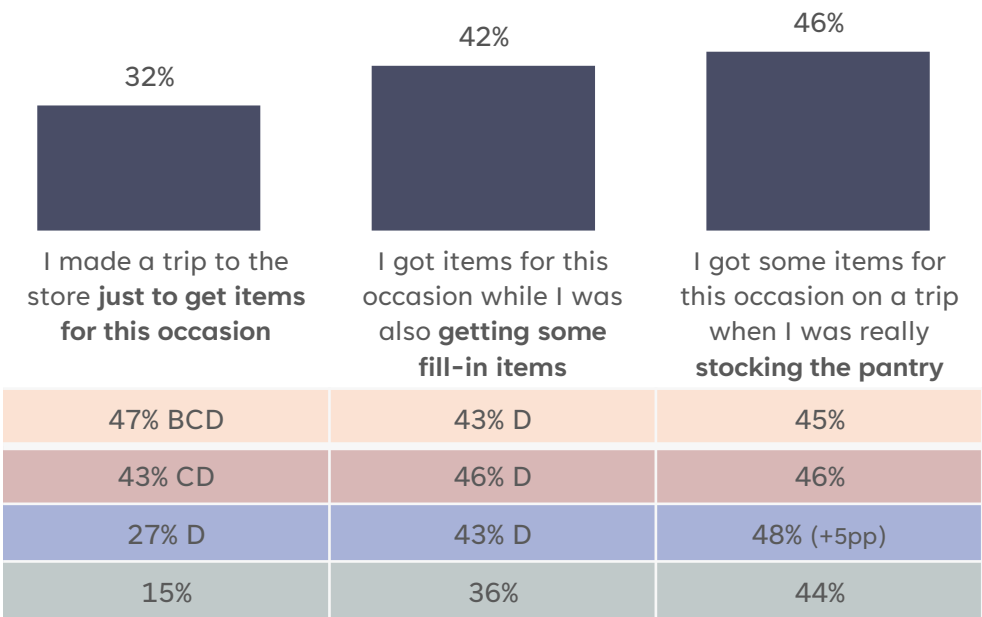
SOURCING TIMEFRAME

Among adult (18-77) occasions not at a restaurant, trended to 2023



TRIP TYPE

Among adult (18-77) occasions not at a restaurant, no significant shifts from 2023



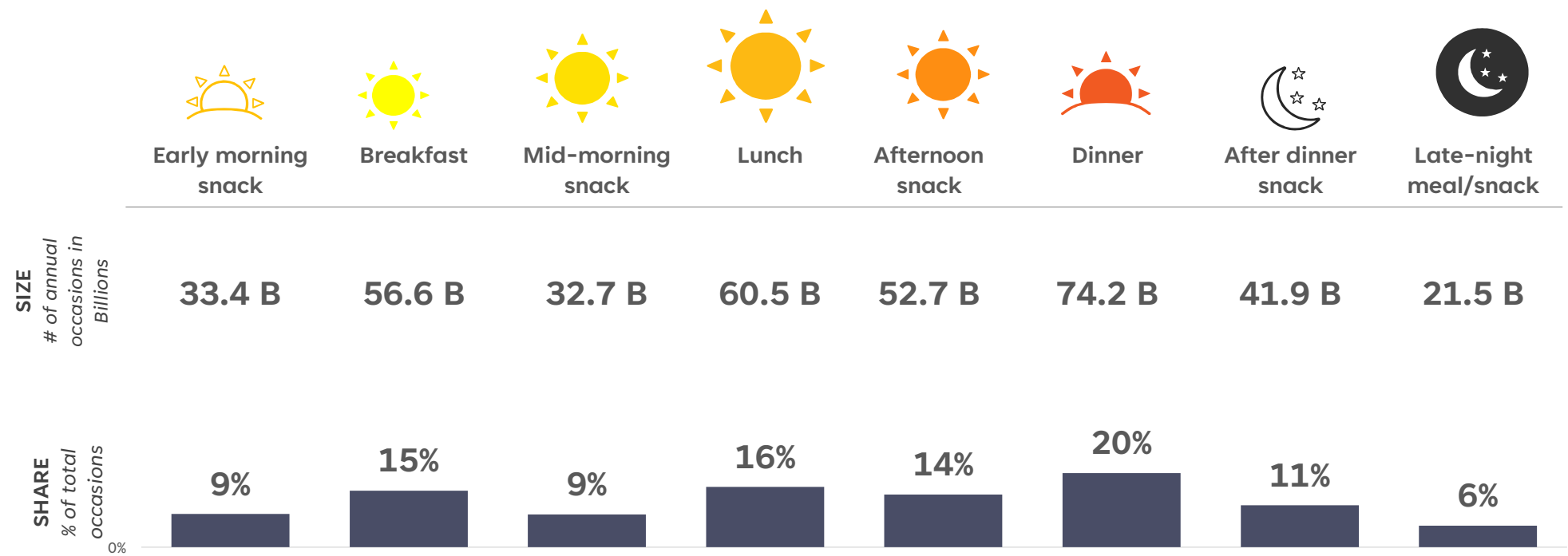
Capital letters (ABC) indicate statistically significant differences between the generational cohorts at a 95% confidence level.
Source: Hartman's Compass Eating & Drinking Occasions Database 2023-2024, Adults 18-77. Trended Base: Total Occasions Not At A Restaurant 2024 n=11,823, 2023 n=13,733; Gen Z 2024 n=1,405, 2023 n=1,354; Millennials 2024 n=3,634, 2023 n=4,074; Gen X 2024 n=3,341, 2023 n=3,865; Boomers 2024 n=3,443, 2023 n=4,440.

A deeper understanding of daypart dynamics can be a key to maintaining relevance and unlocking new opportunities with consumers

As we’ve seen thus far, everything from the social context and eating location to the top consumer needs can vary drastically depending on *when* the eating/drinking occasion takes place across the day.

The following chapter deep-dives into each one of eight distinct dayparts when eating/drinking occurs. Each slide highlights important similarities and differences relative to total occasions, which combine to form unique daypart profiles.

The dayparts profiled on the dashboards that follow include:



Source: Hartman's Compass Eating & Drinking Occasions Database 2024, Adults 18-77. Total Occasions n=12,870.









Defining Dayparts:

Respondents are asked to define their eating occasion as 1 of 8 dayparts. Dayparts are not divided by time (e.g., 8 am), but by commonly understood names. This methodology allows each respondent to interpret daypart definitions according to personal reference.


Interpreting Dashboards

Data reported on dashboards represent % of adult eating/drinking occasions for the specified **daypart**, trended vs. 2023

KEY DETAILS DASHBOARD

- Size of Prize:** Estimated total number of adult (18+) eating/drinking occasions per year 
- Who Specifics:** Share of occasions that take place alone or with others (couple, family or friends) 
- Where Specifics:** Share of occasions that take place at-home or away-from-home (at work/school, a restaurant, or other away-from-home location) 
- Top Important Food & Beverage Attributes:** % of occasions where specified food and beverage attribute is important. %s do not add to 100% as multiple attributes can be present on one occasion. Top 10 attributes shown. 
- What They Ate/Drank:** % of occasions that include consumption of the specified foods or drinks. %s do not add to 100% since multiple foods/beverages are consumed. Top 10 foods/beverages shown. 
- Food & Beverage Sources:** % of occasions that do not take place at a restaurant that involve foods and beverages sourced from the specified options. Among occasions sourced from a food retailer, top 5 channels shown. 

NEED STATES DASHBOARD

- Emotional Context:** % of occasions where a certain feeling/emotion is present prior to deciding what to have/serve or prepare. %s do not add to 100% as multiple feelings/emotions can be present on one occasion. Top 10 emotions/feelings shown.
- High-level Need States:** % of adult occasions where specified need state is selected as top-3-box consideration. All need states shown. Select high-level need states with specific follow-up needs asked are identified and rank-order among all high-level needs is shown. 

SPECIFIC NEEDS DASHBOARD

For each of the high-level need states with specific follow-up needs, showing the top 4 specific needs ranked by % selected when the higher-level need is a top-3-box consideration.



DEMOGRAPHICS DASHBOARD

Share of occasions taking place among different demographic dimensions, broken down by generation, gender, race/ethnicity, household income, education, marital status, neighborhood type (e.g., city/urban vs. rural), children under 18 in household and employment status.



Measuring Impact with Index Scores:

Index scores are reported alongside %s on each dashboard to shed light on what is relatively more or less important/characteristic of the specified occasion when compared to occasions overall.

Index scores are calculated as the ratio of the specified occasion % to the total occasion %, times 100.

Orange font shows over-indexing ≥ 120 . **Blue** font shows under-indexing ≤ 80 .

Index scores closer to 100 mean the specified occasion % is approximately equal to the total occasion %.

DEMOGRAPHIC PROFILE DASHBOARD

Mid-morning snack occasions are more likely to take place among Gen Z, those employed part-time and African-American and Asian-American consumers relative to total occasions. These occasions also skew slightly towards homemakers and households with children.

MID-MORNING SNACK OCCASIONS



GENERATION	%	Index
Gen Z 18-27	18%	126
Millennials 28-43	37%	109
Gen X 44-59	24%	89
Boomers 60-77	21%	85



HOUSEHOLD INCOME	%	Index
Less than \$40,000	22%	107
\$40,000-\$74,999	18%	79
\$75,000 or more	61%	105



MARITAL STATUS	%	Index
Married; Living together; Civil union	56%	96
Single	30%	105
Widowed; Separated; Divorced	13%	108



EMPLOYMENT STATUS	%	Index
Employed full-time	52%	105
Employed part-time	11%	129
Self-employed	6%	90
Homemaker	6%	118
Unemployed	7%	101
Retired	13%	71
Student	2%	87
Other – NET	3%	106



GENDER	%	Index
Male	49%	101
Female	51%	99



EDUCATION	%	Index
High school or less	36%	108
Some college	6%	99
College grad	57%	96



NEIGHBORHOOD	%	Index
City/urban area	41%	110
Suburbs	46%	99
Rural area	14%	82



RACE/ETHNICITY					
RACE	%	Index	ETHNICITY	%	Index
Caucasian	68%	94	Not Hispanic or Latino	84%	98
African-American	17%	123	Hispanic or Latino	16%	113
Asian-American	9%	124			
Other	6%	96			



CHILDREN < 18 IN HH	%	Index
No	66%	94
Yes	34%	116

Source: Hartman's Compass Eating & Drinking Occasions Database 2023-2024, Adults 18-77.
Base: Total Occasions 2024 (n=12870); Mid-Morning Snack Occasions 2024 (n=861)

Indexed to Total Food and Beverage Occasions. Orange font shows over-indexing>120. Blue font shows under-indexing<80. 6