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?

Additional eating occasions reports and podcasts can be accessed via The Hartman Group's website, https://www.hartman-group.com.
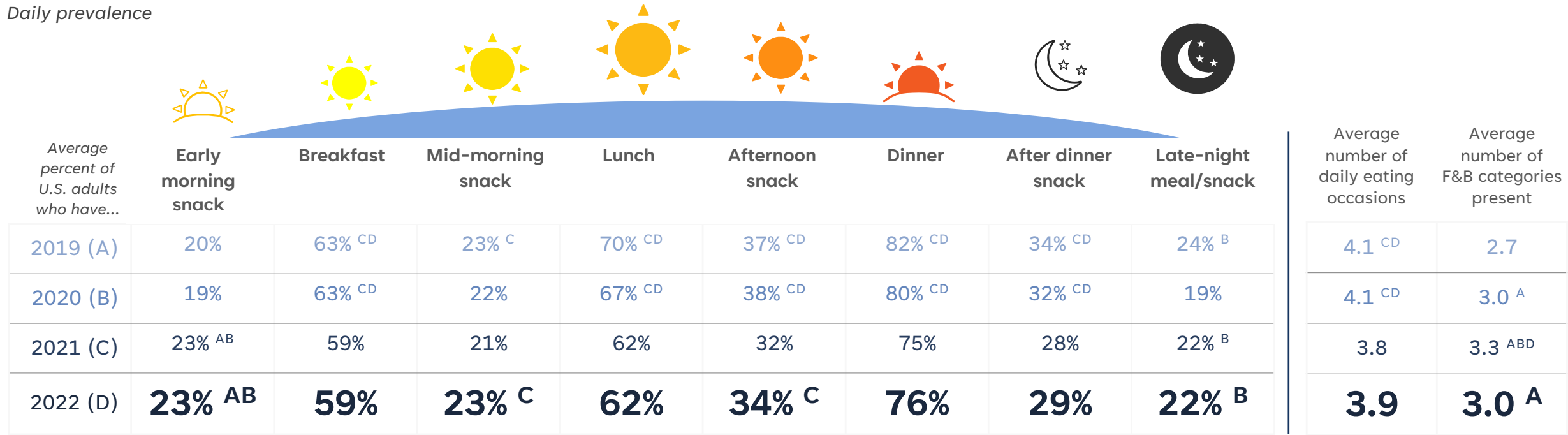
While this report focuses on adult occasions, The Hartman Group's Eating Occasions Compass also captures self-reported teen occasions (aged 13-17) and parent-reported child occasions (under 13 years of age). If you would like more information around children and teen occasions or a more in-depth report specific to your category or business objectives, please reach out to Shelly Balanko, Senior Vice President, at shelley@hartman-group.com

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

Average percent of U.S. adults who have...	Early morning snack	Breakfast	Mid-morning snack	Lunch	Afternoon snack	Dinner	After dinner snack	Late-night meal/snack	Average number of daily eating occasions	Average number of F&B categories present
2019 (A)	20%	63% CD	23% C	70% CD	37% CD	82% CD	34% CD	24% B	4.1 CD	2.7
2020 (B)	19%	63% CD	22%	67% CD	38% CD	80% CD	32% CD	19%	4.1 CD	3.0 A
2021 (C)	23% AB	59%	21%	62%	32%	75%	28%	22% B	3.8	3.3 ABD
2022 (D)	**23% AB**	**59%**	**23% C**	**62%**	**34% C**	**76%**	**29%**	**22% B**	**3.9**	**3.0 A**

Snacks continue to make up about half of all eating occasions throughout the day
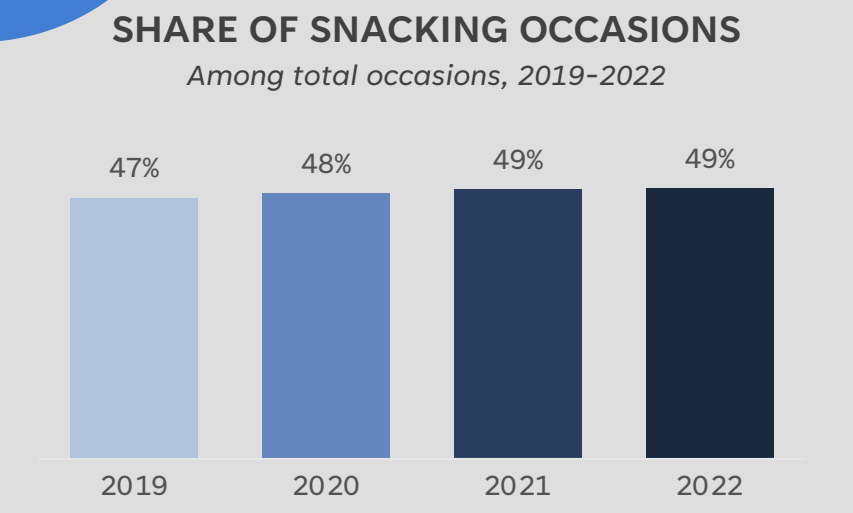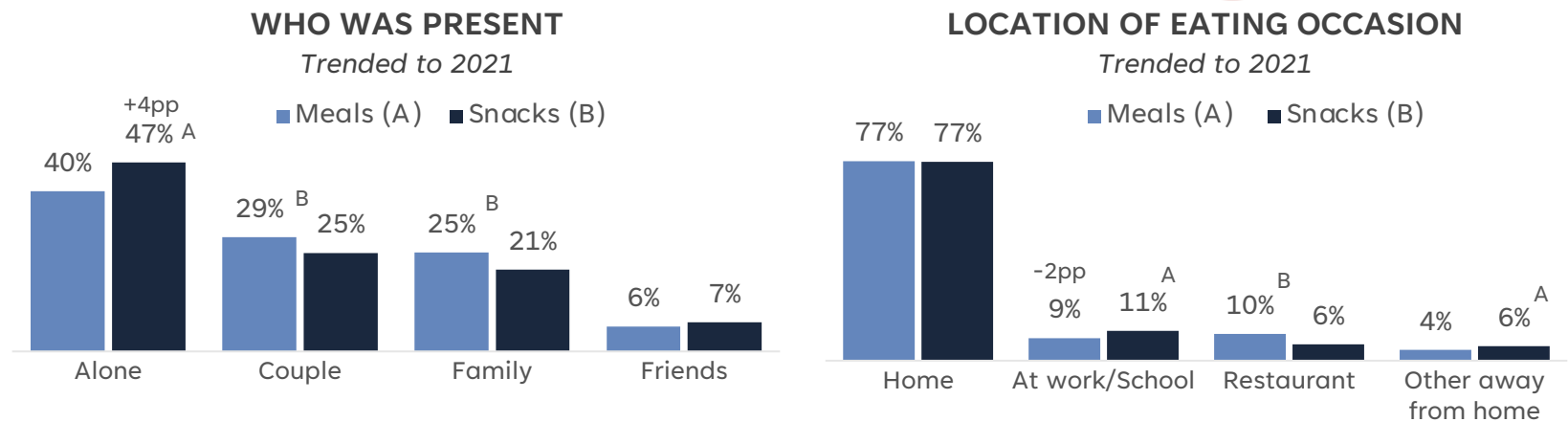
Despite shifts in eating behaviors during the pandemic, the share of snacking occasions has remained relatively stable since 2019. However, there are certain demographic groups, such as younger generations and parents, that are more likely to snack.

Snacks are more likely to take place alone when compared to meals, and the share of alone snacking occasions has increased since 2021. Snacks are also more likely to take place at work/school, or other away from home locations (e.g., while commuting, a sporting event, or a picnic) when compared to meals. Meals are more social in nature, often taking place as a couple or with family members at a restaurant.

49% of all eating occasions in 2022 were snacks

Parents have a higher share of snacking occasions, at 55% (vs. 46% of Non-Parents)

Boomers have the lowest share of snacking occasions among generations, at 44% (vs. 51% Gen Z, 52% Millennials, and 49% Gen X)

WHO WAS PRESENT
Trended to 2021

Meals (A)   Snacks (B)

- Alone: 40% | +4pp 47% A
- Couple: 29% B | 25%
- Family: 25% B | 21%
- Friends: 6% | 7%

LOCATION OF EATING OCCASION
Trended to 2021

Meals (A)   Snacks (B)

- Home: 77% | 77%
- At work/School: -2pp 9% | 11% A
- Restaurant: 10% B | 6%
- Other away from home: 4% | 6% A

SHARE OF SNACKING OCCASIONS
Among total occasions, 2019-2022

- 2019: 47%
- 2020: 48%
- 2021: 49%
- 2022: 49%

As such, diving deeper into each of the eight dayparts can uncover meaningful insights for those in the food and beverage industry

Total occasions can be compelling on their own, providing a high-level look into how total U.S. adults are eating, and how behaviors have shifted year over year. However, this only tells part of the story. As we've seen thus far, the social context, location, sourcing, degree of preparation can vary drastically by daypart. Hence, we dig deeper in the following chapter to uncover important differences across the day. Each daypart is profiled separately in the following dashboards, which include:

EATING OCCASIONS BY DAYPART 2022
Number of annual eatings shown on chart as area of bubble

	Early morning snack	Breakfast	Mid-morning snack	Lunch	Afternoon snack	Dinner	After dinner snack	Late-night meal/snack
SIZE (# of annual eatings)	*33.9 B*	*56.3 B*	*33.7 B*	*58.8 B*	*49.3 B*	*71.4 B*	*41.5 B*	*19.6 B*
Share of Total Occasions	9%	15%	9%	16%	14%	20%	11%	5%

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. The methodology allows each respondent to interpret daypart definitions according to personal reference.

In addition to daypart, Hartman's Compass is a rich data source to query for a variety of eating occasion parameters, including food and beverage category, demographic group, location, social context, sourcing, and need states, to name a few.

Interpreting Dashboards

Data reported on dashboards represent % of adult eatings for the specified occasion

KEY DETAILS DASHBOARD

Size of Prize: Represents the relative importance of this occasion by extrapolating to the total number of adult (18+) eatings this occasion accounts for within a year (one person eating something during this occasion on a single day = 1 mouth).

Who Specifics: Share of adult eatings on the specified occasion that took place alone or with others (couple, family or friends)

Where Specifics: Share of adult eatings on the specified occasion that took place at-home or with away-from-home (at work/school, a restaurant, or other away-from-home location)

Emotional Context: % of adult eatings on the specified occasion which a certain feeling/emotion was 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.

What They Ate/Drank: % of adult eatings on the specified occasion that included the specified foods or drinks.

%s do not add to 100% since multiple foods/beverages are consumed. Only most sizeable categories displayed. Also lists % of occasions that included all/some leftovers.

Channel Where Food Is Sourced: % of adult eatings on the specified occasion that sourced at least some of the food or beverage from specified channel.

NEED STATES DASHBOARD

To better show the relative importance of various needs across the day, we rank ordered top needs on the occasion as follows:

Select Top Need States: Rank order of select high-level needs rated a consideration (top-3-box) on the occasion.

Top Specific-Need State: For each set of specific-needs, all sub-needs that over-indexed (120+ against total eating occasions) were first isolated, then the top 2 based on percentage were shown. If no sub-needs over-indexed, the two highest indexing sub-needs were shown, also sorted by percentage.

Additional General Needs: All remaining needs/attributes that over-indexed (120+ against total eating occasions) were first isolated, then the top 5 based on percentage were shown. If no high-level need/attribute over-indexed, the five highest indexing needs were shown, also sorted by percentage.

DEMOGRAPHICS DASHBOARD

Share of adult eatings on the specified occasion 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:

An Index compares the occasion data to the total data and is defined as the ratio of the occasion data to the total data, times 100.

Orange font shows over-indexing > 120. **Blue** font shows under-indexing < 80

KEY DETAILS DASHBOARD

Late-night meal/snack occasions are more likely than total occasions to take place alone or with friends and involve a range of feelings from boredom to delight, with more indulgent foods and beverages.

SIZE OF PRIZE

19.6 B — Mouths per year

5% — Of total mouths

EMOTIONAL CONTEXT: Top Feelings

	%	Index
I was just hungry	39%	101
I wanted some food that would delight me	22%	124
I was just thirsty	16%	148
I wanted something indulgent/decadent	16%	191
I was just eating out of habit	13%	98
I was bored	12%	208
I was tired	12%	143
I wanted to enjoy some really good food with someone I care about	11%	96
I wanted some food that would wow me	10%	158
I needed to eat/drink and wanted something good/healthy	10%	71

WHO WAS PRESENT

	%	Index
Alone	53%	120
Couple	25%	93
Family	14%	62
Friends	8%	126

WHERE IT TOOK PLACE

	%	Index
Home	87%	113
At work/School	3%	35
Restaurant	6%	69
Other away from home	4%	77

WHAT WAS CONSUMED

TOP FOOD CATEGORIES	%	Index	TOP BEVERAGE CATEGORIES	%	Index
Sweets	19%	272	Carbonated soft drink/Soda/Pop	19%	143
Salty snacks	18%	276	Water	17%	102
Breads/bread-like products	12%	82	100% fruit juice/nectar	10%	104
Cheese	12%	91	Coffee	9%	62
Crackers	11%	181	Alcoholic beverage (asked if 21+)	7%	126
Hamburger/Cheeseburger	10%	180	Chocolate milk	7%	121
Dairy products other than cheese	9%	91	Espresso drink	6%	193
Pizza/Pasta/Italian	9%	124	Fruit smoothie	6%	201
Fruit/Fruit Snacks	8%	80	Iced Tea	5%	78
Meat cuts (excluding seafood)	8%	68	Milk, plain	5%	126

25% of Late-Night Meal/Snack occasions involve all/some leftovers (96 Index)

CHANNELS WHERE FOODS & BEVERAGES WERE SOURCED
Among occasions not at a restaurant

TOP SOURCES	%	Index
Food retailer	79%	106
Restaurant	16%	94
Vending machine	5%	123
Work	5%	77
Online-only service	5%	111

TOP FOOD RETAILERS	%	Index
Grocery	66%	98
Mass Merchandise	31%	117
Dollar/Discount	10%	154
Convenience	7%	127
Club	5%	64

Please see appendix for additional details available for food & beverage categories.

Source: Hartman Eating Occasions 2022, Adults 18-76. Base: Total Occasions (n=9,875-13,696); Late-Night Meal/Snack Occasions (n=650-818).
Indexed to Total Food and Beverage Occasions 2022. Orange font shows over-indexing>120. **Blue** font shows under-indexing<80.