

Compass Eating Occasions Overview





Overview

HOW DO AMERICANS EAT?

The Hartman Compass Eating Occasions resource was built to fill an unmet information need, providing foundational numbers and insights about the basics of eating in America. Compass measures food consumption using survey methods specifically designed to reveal market opportunities obscured or distorted by other industry and government resources .

WHY EATING OCCASIONS?

Because a **unified** (i.e., sourcing agnostic), **consumer culture**- and **consumption**-centric picture should underlie sector, category and brand dynamics and inform opportunities.

In today's America, the same person eats differently at different times and in varied contexts. People therefore can't reliably describe in general how often they eat and why. However, they can describe whether, how and why they've recently eaten, and with careful prompting they can recall what they have chosen to consume on a given occasion. Eating needs and desires, but also social contexts, drive food choices and sourcing decisions. Shopping is just a way, and only one way, to obtain what we want to eat. Insights on psychology and emotion have supported marketing tactics, while understanding the needs and choices shaped by dynamic food culture can go further to realign positioning and business strategies.





How Compass works

The Hartman Eating Occasions Compass uses a powerful online recall methodology that randomly selects one or 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 (or their child's) 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/where items were acquired. The Hartman Eating Occasions Compass survey is fielded three times annually (Spring, Summer and Fall).

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

As of January 2023, the database includes:

- 128,000+ respondents (covering 2012 through 2022)
- 190,000+ adult eating occasions, plus an additional 44,000+ child eating occasions
- Starting in 2016, teen (13-17 years old) occasions have been captured to provide an in-depth look at how this emerging consumer group eats





How Compass data helps your business

Examples of business specific questions that Compass can address:

- What is the size of the opportunity?
- What demographic groups should we be targeting?
- What daypart offers the largest opportunity for at-home consumption of X category?
- What serving size and formats should we consider?
- How should we market/advertise products to our target audience?
- What types of recipes should we feature with our products? Do consumers prefer ready-to-eat options, easy-to-cook options, or do they prefer heavier levels of cooking engagement?
- Are decisions about what to have on these occasions more spur of the moment or do they involve more planning?
- What type of retailers/food service establishments are used to source X category? Should we consider distribution at retail channels such as convenience and drug?
- How can we best cater to consumer cravings on these specific occasions? What food and beverage attributes are more likely to be sought?
- How can we go beyond baseline considerations? What needs should we be targeting to stand out?



Defining Eating and Drinking Occasions

An eating occasion is any time in which you eat or drink something, and it includes everything you had at that time. For example, an occasion can be as small as having a glass of water in the afternoon – or it can involve multiple foods and beverages such as going out for lunch and eating a salad and pizza, along with a glass of water and iced tea to drink. Regardless of how many items are consumed, anything eaten/drunk at one time would be included in the occasion.

Painting a 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





Capturing the Eating and Drinking Occasion

WHO: THE RESPONDENT

- Age, gender, education, household income, household demographics, employment, race/ethnicity, retailers shopped (past 3 months and primary store), etc.

WHEN, WHERE, WITH WHOM: PAST DAY'S EATING & DRINKING

- For self and for one selected child, if any, with counts of distinct meals and snacks; and then for each daypart
- Alone, with partner, child, family, friends, parents, etc.
- At home, work, school, restaurant, park, retail, on-the-go, etc.

Assignment to an occasion, at random

WHY: SITUATIONS & MOTIVATIONS

- Activity while eating (online, reading, listening to music, enjoying company of others, working, etc.)
- Influences on food selection (working, traveling, shopping, socializing)
- Time between food choice and food consumption
- Emotions when making food choice (bored, hungry, distracted, seeking enjoyment, seeking a meal to enjoy with others, etc.)
- Food/ingredient motivations (e.g., convenience, savings, iconic brand experience, health, indulgence, fresh & less processed, flavor)

WHAT: THE FOOD & BEVERAGE

- If cooked, cooking techniques
- Types of food/beverage consumed (contact our team for the full list), and condiments/sauces/dips used
- Format of each item (takeout, frozen, canned, etc.) and/or source (restaurant, fresh prepared from deli)

SOURCES & TIMEFRAME: PLANNING & PURCHASING

- At channel level; food from home, from restaurant, from store, etc.
- Planning and shopping timeframe

Repeat for second occasion, assigned at random



*What did you drink?
When was this occasion?
Where was the meal / snack sourced?
What else were you doing?
Where were you?
How were you feeling?
How was the meal / snack prepared?
Who was with you?
What did you eat?*



Compass Sample Details: Adult & Kid Occasions

	11-Year Total	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Number of Respondents	128,207	11,955	12,074	12,477	11,951	12,715	13,726	10,289	10,025	9,622	11,822	11,549

ADULT OCCASIONS

Number of records ("eatings")	190,044	19,795	20,856	21,475	20,464	17,879	19,083	14,179	14,315	13,645	14,654	13,696
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Month of survey

April-May	63,840	6,547	6,972	7,034	6,765	5,940	6,261	4,652	5,187	4,727	4,859	4,896
July-August	62,221	6,238	6,994	6,653	6,884	5,959	6,184	4,863	4,481	4,436	5,252	4,278
October	63,983	7,010	6,890	7,788	6,815	5,980	6,638	4,664	4,647	4,482	4,543	4,522

	11-Year Total	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
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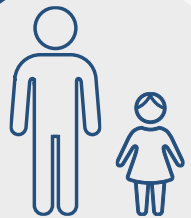
KID OCCASIONS*

Number of records ("eatings")	44,259	2,289	2,039	1,696	1,618	6,133	6,907	5,283	4,602	4,504	4,876	4,312
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Month of survey

April-May	14,189	797	745	496	475	1,983	2,320	1,488	1,547	1,457	1,699	1,182
July-August	15,368	817	614	616	541	2,032	2,193	2,188	1,501	1,555	1,804	1,507
October	14,702	675	680	584	602	2,118	2,394	1,607	1,554	1,492	1,373	1,623

*Starting in 2016, teen (13-17 years of age) occasions are self-reported. All younger children (0-12 years of age) occasions are parent-reported.





Ways to engage with the Compass Database

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:

- Reliance on Restaurants 2023
- A New Landscape of Eating 2023
- Shifting Food Habits & Routines 2022
- Redefining Normal 2021
- COVID-19's Impact on Eating 2020
- Eating Occasions Dashboards (yearly)

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 report releases.

CUSTOM OCCASIONS ANALYSIS



Leverage robust insights from Compass 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 timeframes (e.g., immediate consumption vs. stock-up)

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 Compass Eating Occasions database via custom data cuts and reports. Packages start at 50 consulting hours.



How to Query Compass

Compass is a rich data source to query for a variety of eating occasion parameters, including:

- **Food/beverage category**
Add additional parameters for more specific results (e.g., pasta occasions at home vs. away from home or fresh pasta vs. shelf stable pasta occasions)
- **Demographic group**
Includes generational cohort, gender, and region—add additional parameters for more specific results (e.g., Millennial females with young children)
- **Occasion context**
Explore away from home, together vs. alone eating, on-the-go, and a variety of other contextual parameters
- **Sourcing channels**
Retail and foodservice channels (e.g., specialty/natural, QSR), as well as specific retailers shopped in the past three months, primary store and restaurants where the occasion was sourced
- **Daypart, weekday vs. weekend**
E.g., snack vs. meal occasions, breakfast vs. morning snack occasions
- **Need state**
Both higher-order need states (e.g., positive nutrition) and sub-needs (e.g., protein seeking)



Report Options

Report content can be customized based on specific needs and objectives, but we offer the following options as a starting point...

Report Type	OCCASIONS DASHBOARDS Condensed, data-focused	FULL OCCASIONS REPORT More expansive data points, analysis, and insights, data focused	KNOWLEDGE DISCOVERY Qualitative insights paired with occasions and/or syndicated data
Report Length	4 PPT slides	20-25 PPT slides	35-40 PPT slides
Best for	Quick read, high-level insights	Developing a base-level understanding the occasion(s) being analyzed	Developing a deep understanding of trends, occasions, and marketplace examples impacting a specific topic area
Included	<p>Key Details Dashboard</p> <ul style="list-style-type: none"> ○ Occasion size ○ Who was present ○ Where it took place ○ Food and beverage (top 10) ○ Emotional context (top 10) ○ Sources, food retailers (top 5) <p>Need States Dashboard</p> <ul style="list-style-type: none"> ○ 8 high-level needs, with top 2 over-indexing specific needs ○ Other high-level needs (top 5) ○ Important food & beverage attributes (top 5) <p>Demographics Dashboard</p> <p>Key Takeaways and Recommendations</p>	<p>All metrics provided in the occasions dashboards <u>plus</u>:</p> <ul style="list-style-type: none"> • More expansive details and analysis of the following metrics <ul style="list-style-type: none"> ○ Food and beverage (top 20) ○ Emotional context (18) ○ Sources (6), food retailers (8) and restaurant type (13) ○ Need states, including all high-level considerations (23) and specific sub-needs (60+) ○ Important food & beverage attributes (17) <p>Additional metrics and analysis, including</p> <ul style="list-style-type: none"> ○ Daypart distribution ○ Activities while eating ○ Cooking methods and degree of preparation ○ Planning and purchasing timeframe, trip type ○ Restaurant selection criteria ○ Occasion characteristics 	<p>Includes applicable occasions data and analysis provided in the full occasions report option <u>plus</u>:</p> <ul style="list-style-type: none"> • Identify and synthesize key trends impacting the topic/category of interest • Qualitative and quantitative insights leveraging Hartman’s in-house studies/reports and other secondary sources: <ul style="list-style-type: none"> ○ Relevant syndicated studies (e.g., Health & Wellness, Organic, Sustainability, Food Sourcing, etc.) ○ Related Hartman intellectual capital (e.g., annual trends report, Ideas in Food, and additional white papers) ○ Client specific proprietary studies (e.g., any applicable internal consumer insight reports or proprietary data) ○ Other secondary data sources (e.g., Pew Research, Euromonitor, Census data, etc.) • Marketplace examples, including emerging brands, products, services and best in class expressions of trends • Key Recommendations and Opportunities
Delivery	~3 weeks	~4-5 weeks	~6-7 weeks
Starting Price	\$5,000 (Included in Retainer Package)	\$12,000 (Included in Retainer Package)	\$30,000

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, Ph.D., 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