



# Reliance on Restaurants

## An American Eating Occasions Perspective

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Restaurants have long been a driving force of U.S. food culture, as consumers utilize foodservice for a variety of reasons ranging from convenience and flavor to socializing and discovering food traditions from around the globe. Today, about one-quarter of all U.S. adult eating occasions involve restaurant-sourced food and beverage.

Utilizing the Hartman Group's proprietary Compass Eating Occasions Database, this report takes an in-depth look into restaurant occasions, including a need state framework that contextualizes and illuminates the ways in which Americans use restaurants to obtain food, from full-service dining to casual takeaway.

- **For those outside of the foodservice sector**, including manufacturers and retailers, this report can serve as a primer for how and why restaurants are used and how they increasingly compete with food retail as a source for everyday eating.
- **For those with deep existing knowledge of foodservice demand, including restaurant operators and suppliers**, this report can situate restaurant usage within the broader context of eating and point to the rapidly changing opportunities to meet an increasing share of consumer needs.

Ultimately, a better understanding of restaurant occasions is essential for those across the food and beverage industry to help inform strategy.

In 2022, over  
**87 Billion** U.S. adult eating occasions involved restaurant-sourcing  
(including dine-in, takeout, delivery and leftovers)

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## About *Reliance on Restaurants: An American Eating Occasions Perspective*

### What's Included?

- Methodology and an overview of The Hartman Group's Compass Eating Occasions Database
- Chapter 1: Introduction
- Chapter 2: Restaurant Need State Framework
  - The role that restaurants play in consumers' daily eating routines
    - Restaurant selection criteria, sourcing and cuisine type
  - Restaurant Need State Framework
    - Sizing and profiling the six fundamental pillars of the framework
    - The importance of pillars based on foodservice channel
    - Correlations between pillars to inform strategic decisions
  - Chapter Takeaways & Recommendations
- Chapter 3: Restaurant Occasions: Demographics, Social Context & Daypart
  - Key differences among the six pillars of the restaurant need state framework and other characteristics of restaurant occasions by:
    - Generation (Gen Z, Millennials, Gen X, Boomers)
    - Parental status (parents vs. non-parents)
    - Social context (alone, couple, family, friends)
    - Daypart (snacks, meals and breakfast, lunch, dinner)
  - Chapter Takeaways & Recommendations
- Chapter 4: Restaurant Occasions: Dine-in vs. To-go
  - Profiling differences and similarities between:
    - Occasion context (including who was present, where it took place, daypart and key demographics), planning and sourcing
    - Restaurant Need State Framework
    - Restaurant Selection Criteria, cuisine type and activities
  - Chapter Takeaways & Recommendations
- Top 10 Takeaways

**54-page report in PowerPoint and PDF format**

### About The Hartman Group's Compass Eating Occasions Database:

The Hartman Group's Compass Eating Occasions Database uses a powerful online recall methodology that randomly selects and profiles 1-2 eating or drinking occasions that a consumer 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 resulting 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 3 times per year (spring, summer and fall) 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, balanced against all major demographics. Respondents recall eating occasions distributed across days of the week, leading to an occasion sample reflecting all U.S. adult occasions.

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