



At the Dining Table 2021: American Meals and Cooking

Meals in American households are woven into the cultural fabric of everyday life: They serve as a unifying experience shared by most, if not all, consumers. Societal shifts have resulted in major changes in how Americans prioritize not only their time for meals but also what they value in their food. The continuing COVID-19 pandemic has altered and accelerated these shifts.

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Market coverage: U.S. Market

At the Dining Table 2021: American Meals and Cooking takes stock of where two years of a national pandemic have left U.S. consumers amidst influences from ongoing changes in demographics, employment situations, food accessibility, and food values all of which have shaped how consumers approach meals and what they seek from mealtimes.

Compared to previous decades, consumers demand more from meals today, with needs ranging from better health and nutrition to elevated taste distinctions, added convenience, and further opportunities for customization.

At the Dining Table 2021: American Meals and Cooking features unique hybrid analyses of both quantitative and qualitative data drawn from a study-specific survey, The Hartman Group's proprietary Eating Occasions Compass database of American eating patterns, and virtual interviews and mobile ethnography. The 110-page report is an essential, investigative research study, providing in-depth analysis and thought-provoking insight backed by a range of data for startups, established companies, investors, and stakeholders across the food and beverage industry.

What's included?

- General report (PowerPoint and PDF)
- Executive summary
- Demographic data tables (Excel)

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Explore the Report

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Methodology

- Integrated qualitative and quantitative methodologies.
- **Quantitative:** A nationally representative online survey of n=2,096 U.S. adults (aged 18–75), conducted November 3–21, 2021. Results weighted to age, gender, division, income, race/ethnicity and presence of children to match the 2021 Census Bureau Current Population Survey).
- **Quantitative:** Analysis of Hartman Group’s proprietary Eating Occasions Compass, a comprehensive database on American eating patterns, grounded in a complete enumeration of past-24-hour eating occasions, going back to 2012. This report features insights from this database on meal (breakfast, lunch, and dinner) occasions, with trends shown from 2019 where available.
- **Mobile Qualitative:** 5-day asynchronous task assignment via specialized mobile app. Respondents received multiple tasks per day (video, text, and photo tasks) related to their attitudes and approaches to meal planning, procurement, and preparation.
- **Virtual Interviews:** Consumers participated in 1-hour virtual interviews to contextualize assignment uploads and dig deeper into key topic areas.

Executive Summary

Ongoing, long-term changes in demographics, employment situations, food accessibility, and food values have shaped how consumers approach meals and what they seek from mealtimes

Consumer archetypes bring to life how different consumers engage with food and reflect their priorities at mealtimes, and the opportunities for food and beverage brands therein:

Capable Cooks represent consumers’ scratch cooking aspirations and a desire to return to fresher, less processed food consumption lifestyles.

Exploring Eaters are emblematic of a wider consumer trend towards seeking discovery and delight in new global cuisines.

Discerning Denizens are the tip of the spear in a deepening mainstream consumer engagement in food attributes, sourcing, ingredient functionality.

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Mealtimes offer the comforts of routine, the pleasures of company, delights of flavorful experiences in less than certain times, though consumer habits for meals have changed to varying degrees

Consumer approaches to meal planning encompass a range of strategies and considerations, and many are searching for ways to incorporate ideas for more inspired repertoires

In meal procurement and preparation, consumers utilize the strengths of sourcing channels to address their changing needs of the day and seek solutions that help ease pain points of time and energy

Breakfast, lunch, and dinner occasions have experienced pandemic-related shifts in recent years

Chapter 1: Meals Today

Current American approaches to meals reflect an ongoing interplay between tradition and exploration, and between creativity and utilitarianism

Cultural and demographic shifts in the U.S. shaping consumers' priorities in food and meals (Data)

Consumer approaches to planning, procuring, and preparing meals today

Meals in context—What defines a meal; ideal meal vs. everyday reality

Approaches in consumers' general food and beverage choices (Chart)

Consumer desires related to ideal meals (Chart)

Limitations and challenges around the everyday achievement of ideal meals (Chart)

Consumer archetypes profiles (Capable Cooks, Exploring Eaters, Discerning Denizens) and their related engagement with food and priorities at mealtimes

Chapter 2: Mealtime Routines and Needs

Participation in eating occasions and associated routines and needs have shifted due to pandemic-associated changes in routines

Participation in eating occasions across the day (Chart; trended)

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Impact of pandemic on consumers' daily meal routines (Chart)

Roles and routines for meals and snacks (Chart)

Benefits sought and areas of improvement for meals (Chart)

Impact of pandemic on household meal consumption (Chart)

Managing meals with children (Chart)

Chapter 3: Meal Planning

Tactics in consumers' planning for meals are seemingly as diverse as consumers' meals themselves

Meal planning strategies (Charts)

Meal planning time frames (Charts)

Important considerations for meal planning (Chart)

Important considerations for planning to cook at home (Chart)

Challenges when cooking at home (Chart)

Online recipes and outsourcing from restaurants or grocery stores (Chart)

Inspiration sources for meals (Charts)

Meal planning and helpful digital formats (Chart)

Chapter 4: Meal Procuring

Consumers' procurement approaches for meals encompass a vast landscape of food options

Sourcing of meals (Charts)

Sourcing solutions for different cooking needs (Chart)

At home solutions: Strategies when pressed for time or lacking energy to cook (Chart)

Use of leftovers (Chart)

Attitudes towards restaurant use (Chart)

Frequency of restaurant use in the past 3 months (Chart) and by format (Chart)

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Chapter 5: Meal Preparation

Meal preparation is where consumer aspirations meet reality, and competing priorities become manifest

Attitude towards cooking (Chart)

Self-assessment of cooking skills (Chart)

Cooking skills acquired or improved during the pandemic (Chart)

Changes in cooking habits since before the start of the pandemic (Chart)

Level of involvement for general at-home cooking (Chart) and engagement with cooking (Chart)

Strategies for managing diverse needs at dinner (Chart)

Cooking: Weekdays vs. Weekends (Chart)

Kitchen tools and appliances-- owned before and acquired during the pandemic (Chart)

Chapter 6. Dayparts in Focus

Consumer priorities and participation in dayparts shift throughout the day, and breakfast and lunch have experienced more pandemic-related changes

Dinner remains the most dependably upheld meal ritual, while breakfast is the meal most likely to be skipped (Data, Chart)

Breakfast occasions (who, where, importance of commensality, use of leftovers) (Charts)

Breakfast planning and sourcing (Charts)

Top 10 need states among breakfast occasions (Charts)

Top foods and beverages at breakfast (Charts)

Lunch occasions (who, where, importance of commensality, use of leftovers) (Charts)

Lunch planning and sourcing (Charts)

Top 10 need states among lunch occasions (Charts)

Top foods and beverages at lunch (Charts)

Dinner occasions (who, where, importance of commensality, use of leftovers) (Charts)

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Dinner planning and sourcing (Charts)

Top 10 need states among dinner occasions (Charts)

Top foods and beverages at dinner (Charts)

Implications and Recommendations

It is critical for companies and brands to simultaneously support consumers' ideal meal aspirations while addressing their broadening needs

Consumers who are highly engaged in food point to multiple threads of mainstreaming approaches to meals that should be considered

Food and beverage brands, restaurants and retailers need to remain vigilant about how the pandemic is continuing to shape consumer routines and priorities at meals

Consumer routines and needs vary from daypart to daypart and can point to ways for honing product communication by occasion



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