



At the Dining Table 2021

American Meals and Cooking



Methodology

QUANTITATIVE

Online Survey

- Fielded Nov 2-21, 2021; n=2,096
- U.S. adults aged 18-75, nationally representative sample balanced to Census with readable samples across age cohorts, racial/ethnic groups

Hartman Group Eating Occasions Compass (2019-2021)

- Fielded three times annually, covering between 9,000-10,000 meal occasions per year
- U.S. adults aged 18–75, nationally representative sample (balanced by age, gender, region, education, income, number of children, and race/ethnicity), provided in this report as preliminary 2021 data

QUALITATIVE

Mobile Ethnography

- Fielded October 15 – 19, 2021
- Asynchronous task assignment via specialized mobile app
- Recruited to represent a mix of key demographics (age, gender, race/ethnicity); socioeconomic status; household compositions; & geographies

Virtual Interviews

- Fielded October 25 – November 1, 2021
- Virtual interviews to contextualize mobile ethnography assignments and dig deeper into key topic areas



Cultural and demographic shifts in the U.S. have profoundly shaped consumers' priorities in food today

Changing Demographics



- New and widening taste preferences
- Changes in household routines and dynamics
- Bifurcation in consumer ability to afford more costly solutions

Changing Food Landscape



- Wider range of options
- Growing expectations for instantaneous availability
- Broadening exposure to global and regional cuisines and flavors

Changing Employment Situations



- More harried, tired consumers
- Less eating out at restaurants
- More time at home and heightened need for variety

Changing Values



- Greater need for individualized choices
- Proliferation of considerations beyond the food itself
- Increasing assortment of quality cues

A shared cultural understanding of an “ideal meal” impacts everyday consumer aspirations

Food

- Delicious and indulgent
- Nutritious and healthy
- Satisfying
- Balanced
- Multiple courses or dishes

Cooking

- Skillful
- Fresh ingredients
- Scratch-made
- Planned / prepared in advance
- Time-tested recipes

The Ideal Meal

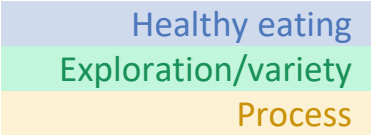
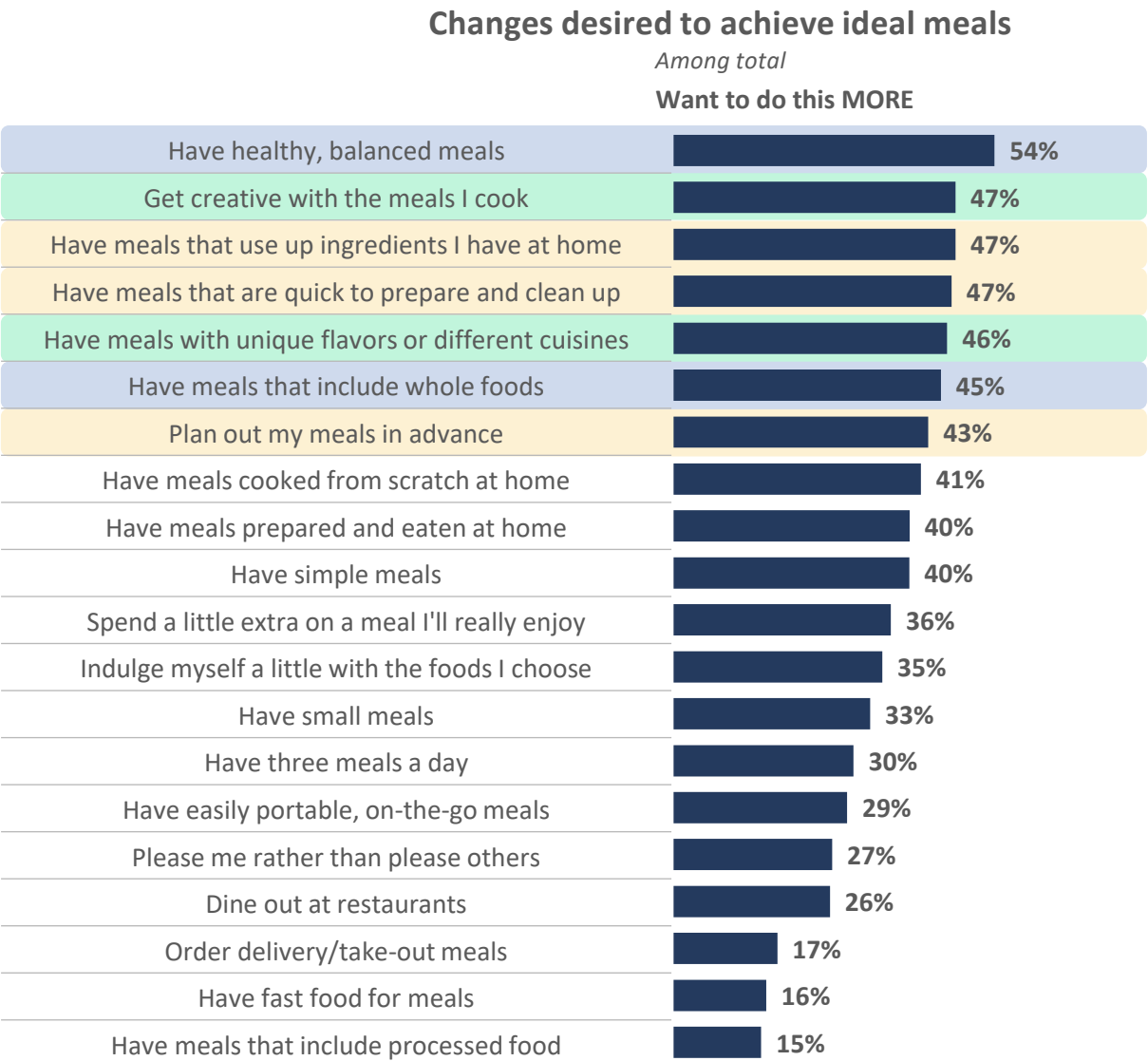
Company

- Enjoyable and appreciative
- At the dining table
- Shared eating / minimal customization
- With extended family or friends

Delight

- Made with love and joy
- An unrushed occasion
- Shared experiences with others
- New memories

Having balanced “square” meals is a principal desire for many in achieving ideal meals more regularly, though convenience and taste considerations are also prominent



Consumers,
however,
understand the
limitations and
challenges around
the everyday
achievement of their
ideal meals

*Right now, everything is
super expensive, so **price** is
definitely a consideration ...
and that drives some of the
meal planning for sure.*

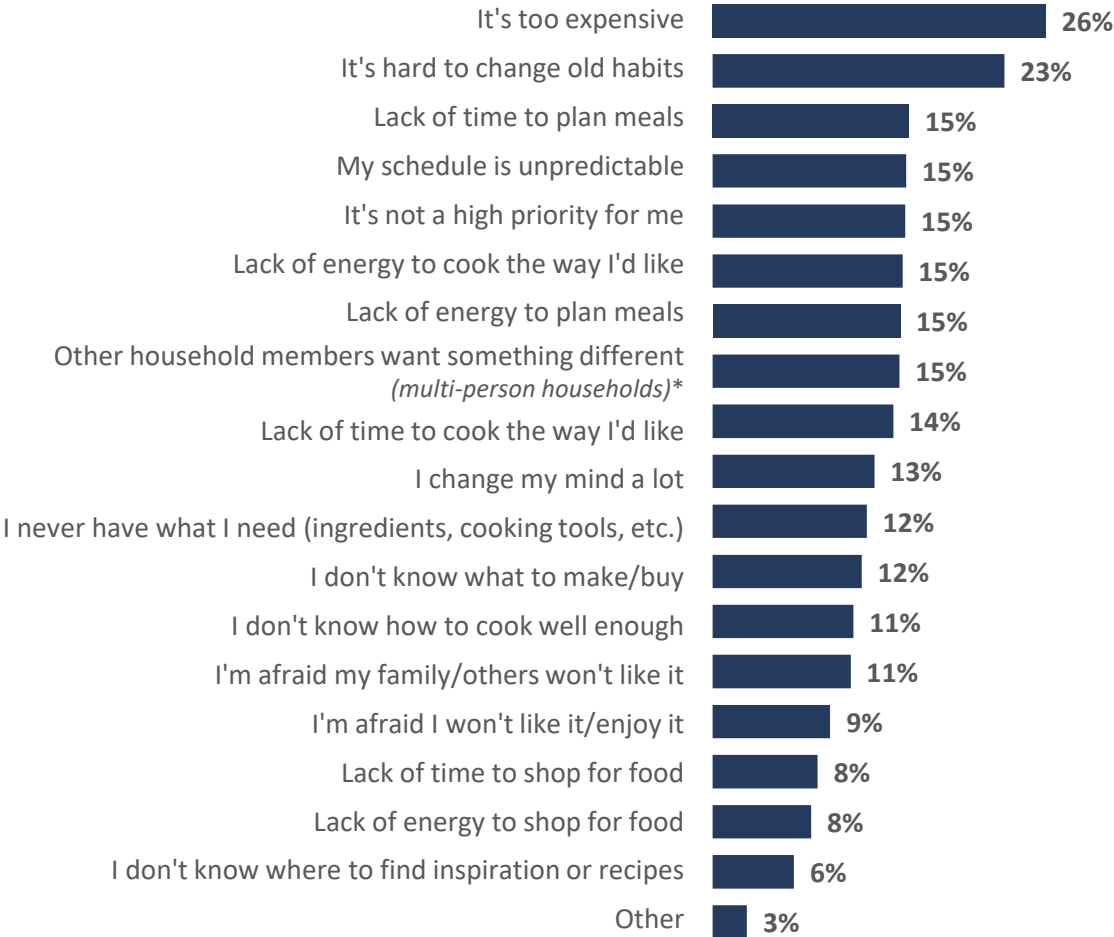
—Susan, F, Gen X

*If I've had a long week, I just
don't feel like I can make
anything. Mostly **time** [is my
biggest challenge], having
to make meals when I also
have like 10,000 other
things I could be doing.*

—Ella, F, Gen Z

Challenges in achieving ideal meals

Among those wanting change to current meals



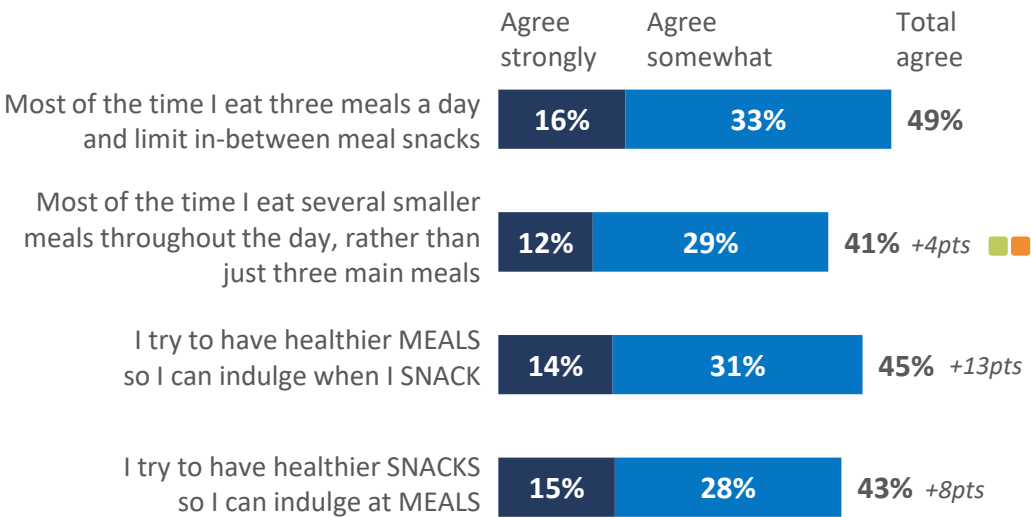
Roles and routines for meals and snacks split broadly into contrasting approaches

Half of consumers try to focus on the three main meals in their day, but nearly as many eat several smaller meals or snack in between—an approach more popular among younger consumers. Similarly, the number of consumers who eat healthier meals in order to indulge in snacks is nearly equal to the number of those who take the opposite approach.



Role of Meals within Eating Routines

Among total, Trended from 2017



Over-indexes 125+ on “total agree” among:

- Gen Z
- Millennials
- Gen X
- Boomers



While food approaches can differ, food is central to most consumers’ lives

“Foodie” as an aspirational designation

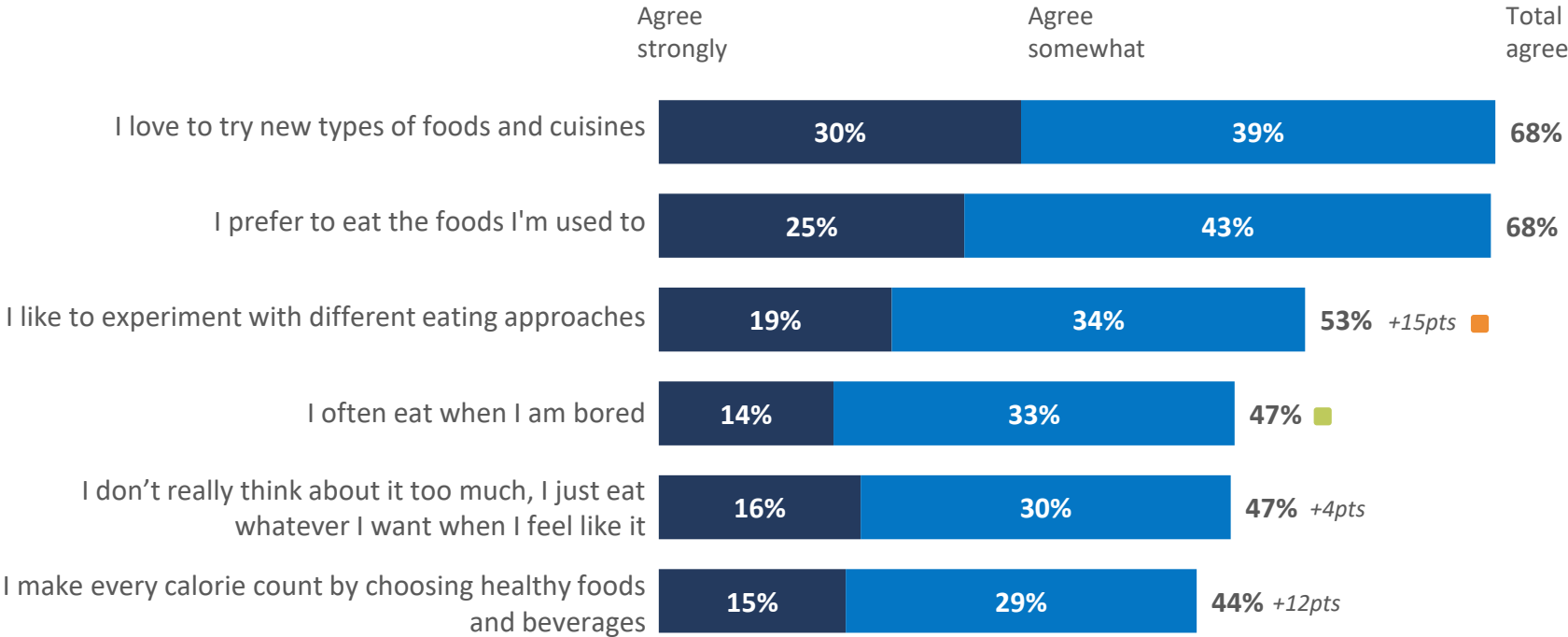
The term succinctly captures the centrality of eating in many consumers’ daily lives, and most see themselves as foodies at least to some degree. It, however, largely sits as an empty signifier of identity that hides more nuanced and idiosyncratic orientations to food and eating, such as engagement with cooking vs. discovery vs. food attributes.

63% consider themselves to be a “foodie” (27% strongly so), and

4 in 5 Millennials do.

General eating approaches

Among total, Trended from 2017



Over-indexes 120+ on “total agree” among:

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Coming up with something different remains a top challenge for meal preparation

Challenges when cooking meals at home

Among total, Trended from 2017



46%

of consumers say they **struggle for ideas** on what meal to make or have at **least weekly** (-4 points from 2017)

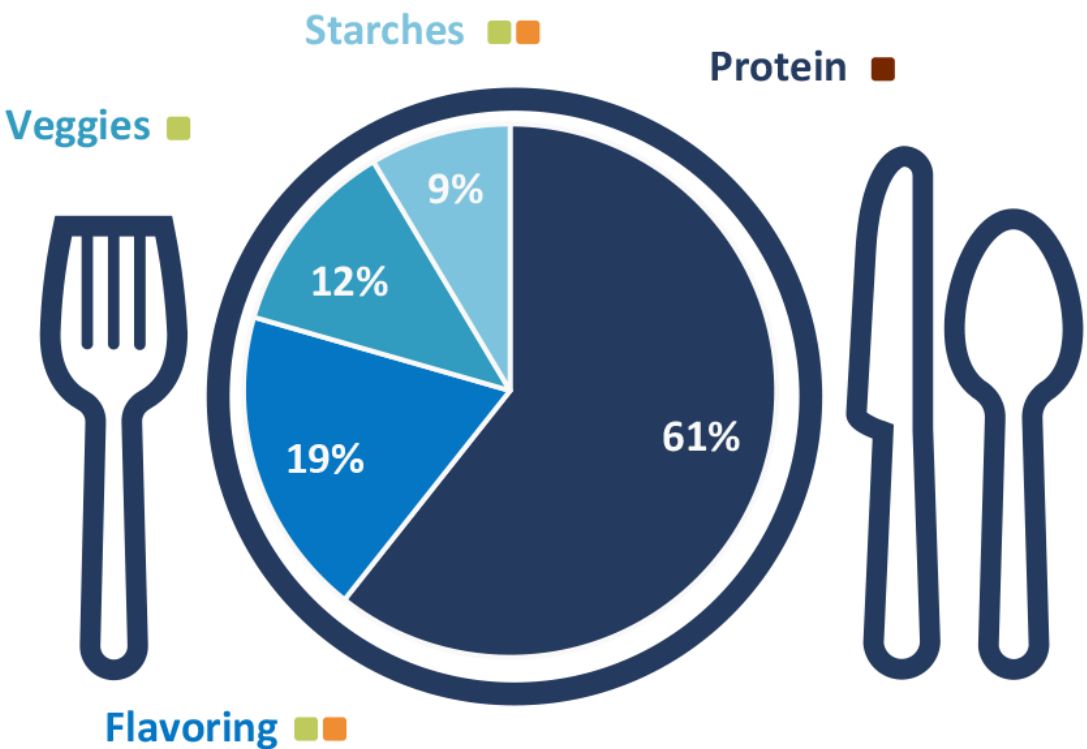
25% have struggled 2+ times a week

Meals are often built around protein, with the overall flavor profile, vegetables, and starchy sides decided secondarily

However, younger consumers and highly engaged consumers skew toward newly emergent trends, including a rise in vegetable-centered approaches and a mounting interest in distinctive cuisines and flavor discovery.

When I plan to cook my typical meal at home, most often I start with the ...

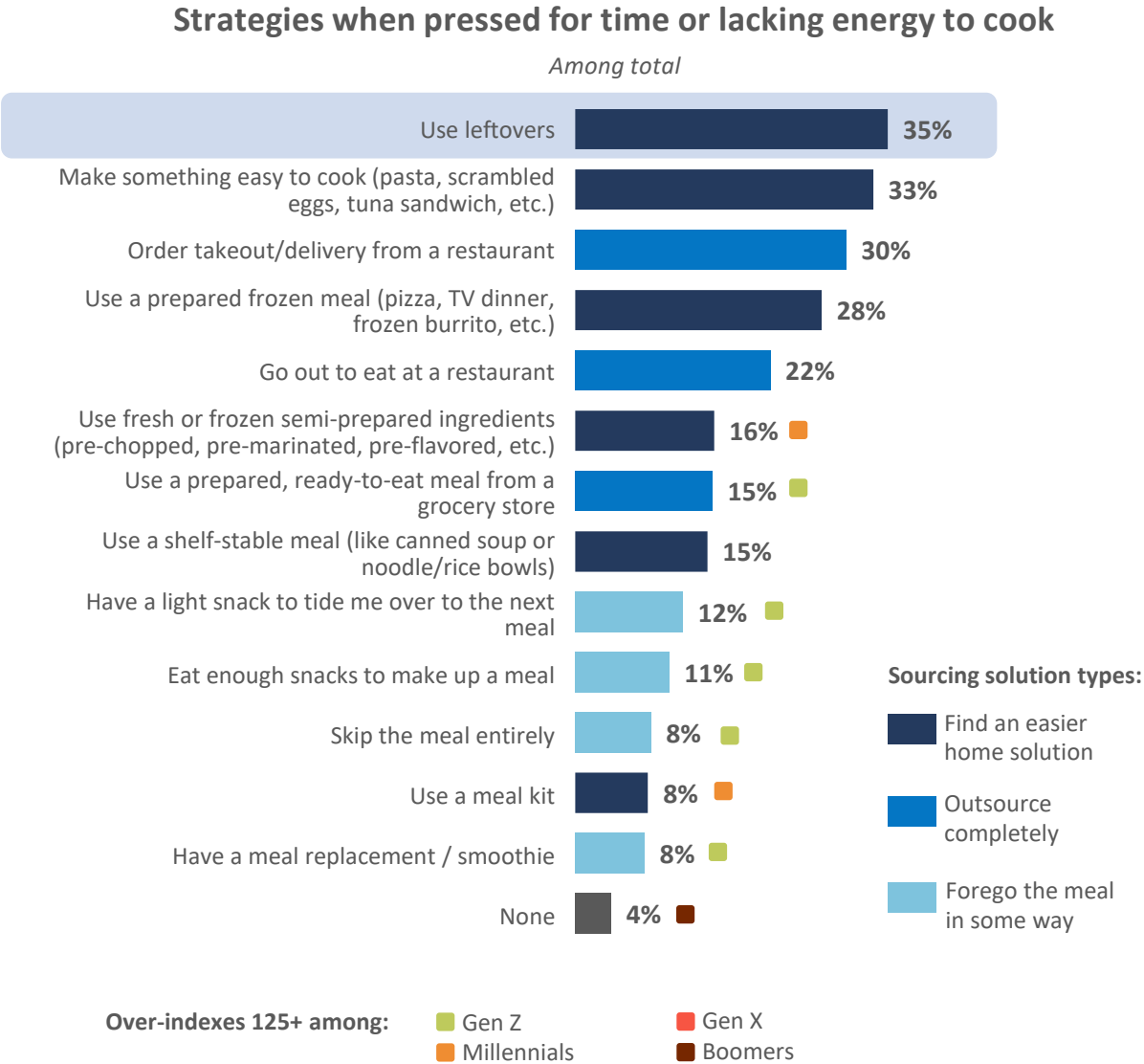
Among total



Over-indexes 120+ among:

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If pressed for time or lacking energy to cook, consumers first look at easy at-home solutions before outsourcing a meal



28% +4pts from 2019

of past-24-hour meal occasions (excluding those at a restaurant/caf ) are composed **entirely or partly from leftovers**

I'm the leftover queen. Sometimes if I have a half a burrito left, I may incorporate some rice or beans on the side and present it as more of a meal.

—Lanita, F, Gen X



I made this lasagna on Sunday. My husband asked me Monday what we were having for dinner, and I sent him this pic.

—Rachael, F, Millennial

Cooking is the work of love (or at least like) for many, and only a minority are truly opposed to the task



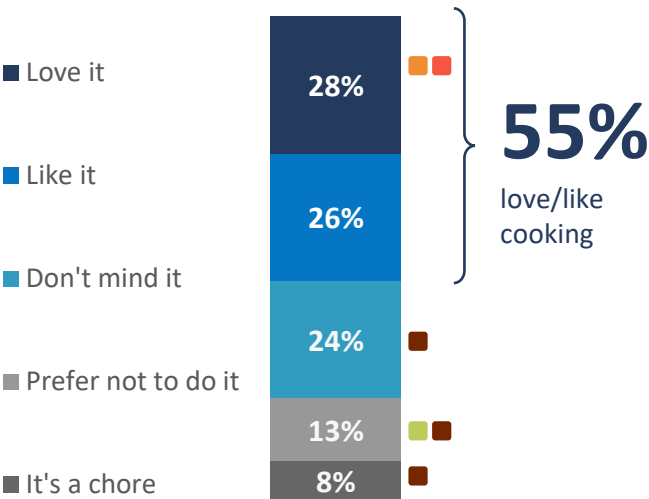
*I don't get tired of cooking.
I just get tired.*

—Dan, M, Boomer

*Sometimes nothing sounds good,
and I just sit there. I'm like, I'm going
to have to do this every day for the
rest of my life.*

—Jesse, M, Millennial

Attitude towards cooking
Among total



Over-indexes 115+ among:

- Gen Z
- Millennials
- Gen X
- Boomers

52% no change vs. 2017
hate having to clean up after preparing food (20% strongly so)

And over half of consumers also see themselves as accomplished cooks

A majority also claim to know a lot about cooking techniques and ingredients, and this number has increased over the past four years, possibly driven in part by increased at-home cooking during the pandemic by many.

Self-assessment of cooking skills

Among total, Trended from 2017

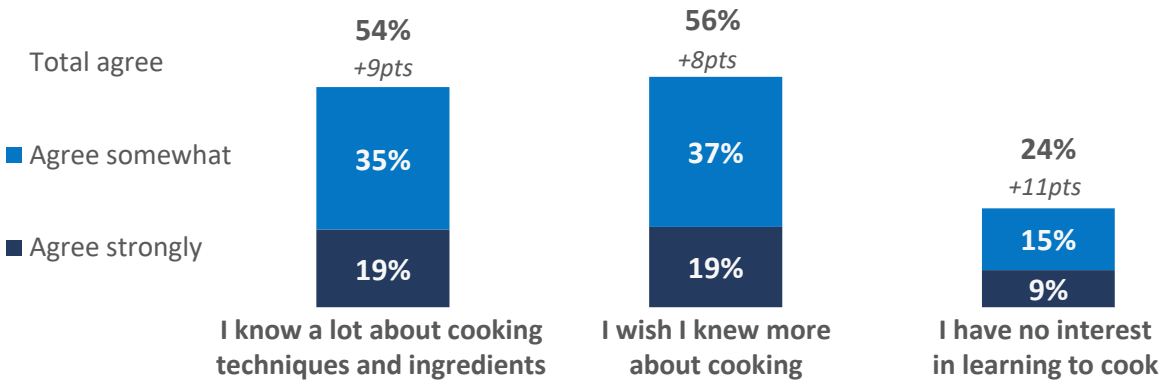


- **Excellent** - I am one of the best cooks I know
- **Very good** - I am a pretty good cook, but I know better ones
- **Fine** - I get by, but I know lots of people who are better
- **Not that good** - I try, but most people are better at cooking than me
- **Not very good at all** - I'm honestly one of the worst cooks I know!



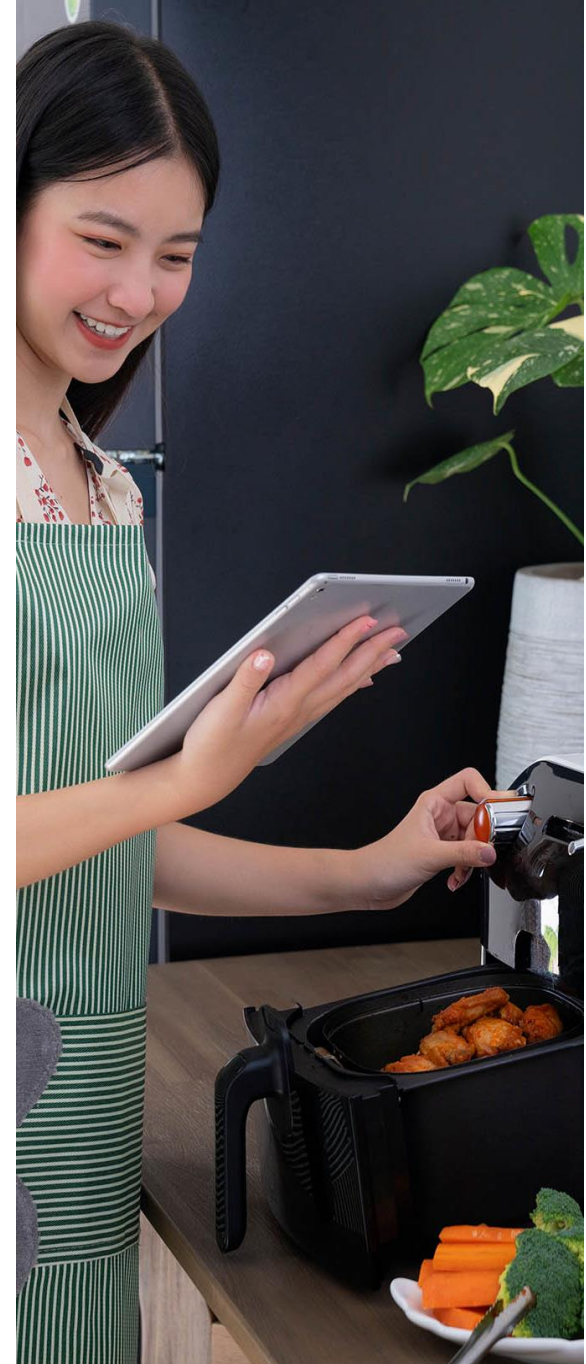
Self-assessed knowledge about and interest in learning more about cooking

Among total, Trended from 2017



Key Takeaways

- 1) Long-term cultural shifts will continue to shape how consumers approach food generally and meals specifically. Looking to highly-engaged consumers can help future-proof brands and companies by aligning to mainstreaming approaches to meals.
- 2) The trade-offs inherent in creating the ideal meal are recognized by the consumer and the meal occasion will dictate which components of the ideal meal will win out. Overall however, food and beverage brands must not forget the primacy of taste as the top consumer priority in meals, even as they seek time-saving, convenient and healthier solutions.
- 3) Younger consumers are trending away from 3 square meals a day and toward several smaller meals so food producers should rethink how to position, size and communicate their offerings to meet these changing needs of tomorrow's key consumer.
- 4) While many consumers have advanced their cooking skills during the pandemic and have access to an array of helpful sources, inspiration is still one of the most acute needs on which manufacturers should innovate.
- 5) Food service establishments can offer compelling solutions for outsourcing meals that address multiple consumer needs for time, convenience, discovery, and flavor, while retailers and manufacturers can work to engage scratch cooking aspirations and position themselves as viable outsourcing solutions.



Thank You!

If you are interested in purchasing the full report, please contact me
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