

EATING & DRINKING OCCASIONS LANDSCAPE 2024

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MARCH 2025

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EXECUTIVE SUMMARY

- Over the past few years, most eating and drinking occasions have stabilized as consumers have settled into life post pandemic. This report identifies key shifts - and subsequent stabilizations - among total adults, highlighting differences in how eating behaviors shift across the day, by generational cohorts, and more. This report is a summary of the Hartman's Group Study:

Eating and Drinking Occasions, Landscape 2024 *(1)*

- **Top 5 Findings:**
  1. Though breakfast, lunch, and dinner eating occasions have stabilized, they have not returned to pre-pandemic levels.
  2. Dinner is the most pre-dominant meal of day, with strong participation among all generations.
  3. Millennials and Gen Z most likely to source foods from a restaurant.
  4. Gen Z and Millennials are more engaged in extensive meal preparation.
  5. Snacking accounts for close to 50% of all eating occasions

GENERATIONS BREAKDOWN:

Boomers: +61 Generation X: 45-60 Millennials: 29-44 Generation Z: 13-28

1. **Eating and Drinking Occasions Landscape: 2024, Underlying Currents of Change, The Hartman Group, February 2025**

EATING OCCASIONS CONTEXT

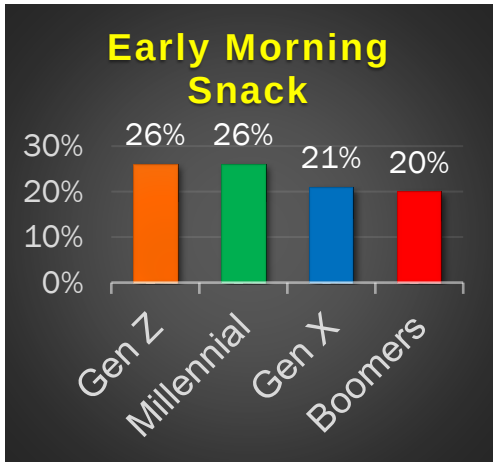
EATING OCCASIONS BY DAYPART Adults 18-73

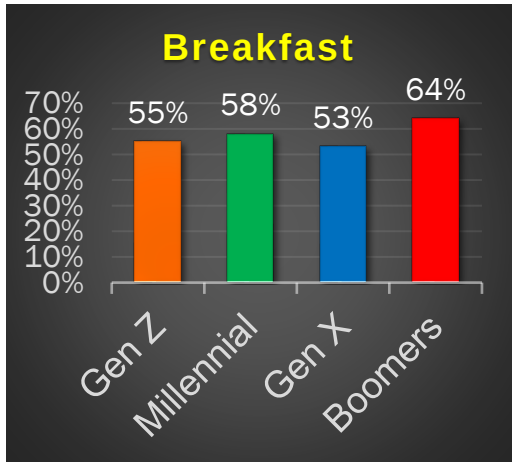
Average % of Adults who have	2019	2022	2023	2024
Early Morning Snack	20%	23%	23%	23%
Breakfast	**63%**	**59%**	**58%**	**58%**
Mid-morning snack	23%	23%	23%	23%
Lunch	**70%**	**62%**	**61%**	**62%**
Afternoon snack	37%	34%	36%	37%
Dinner	**82%**	**76%**	**75%**	**78%**
After dinner snack	34%	29%	30%	29%
Late night snack	24%	22%	23%	23%

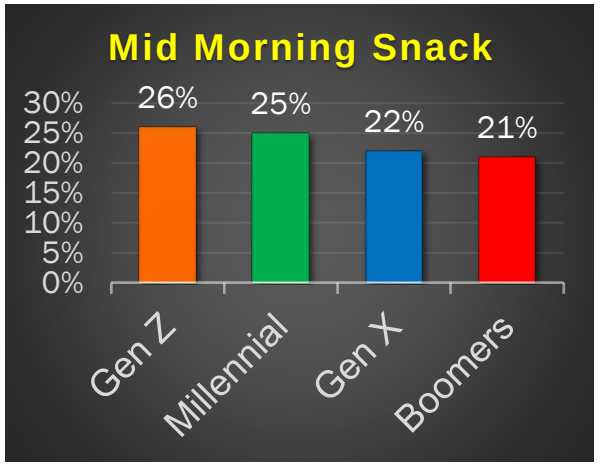
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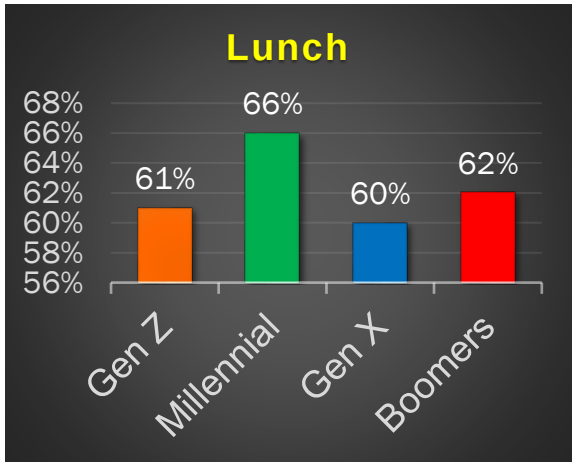
1. Breakfast participation has not retuned to pre-pandemic levels, but stable.
2. Lunch participation is well below pre-pandemic levels, but stable.
3. Dinner participation is up over last year, but below pre-pandemic levels,

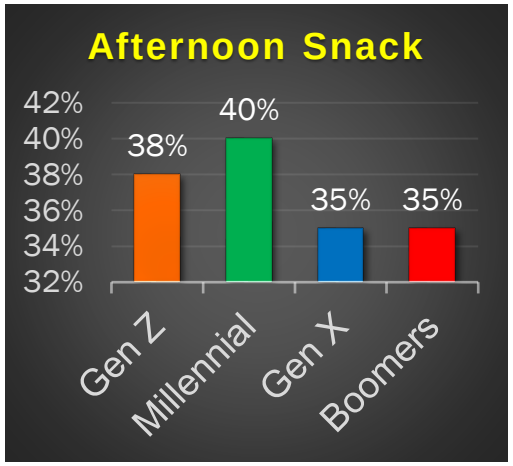
EATING OCCASIONS BY GENERATION

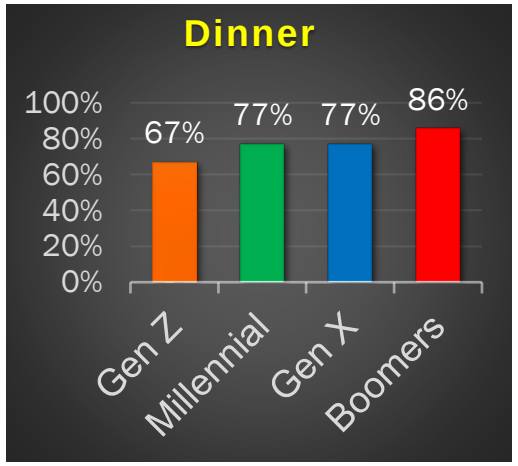


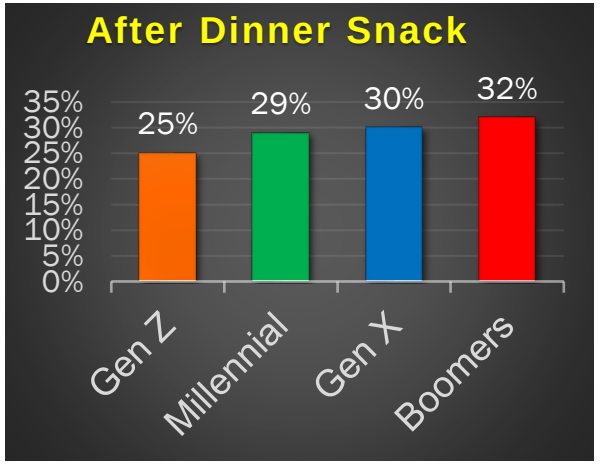


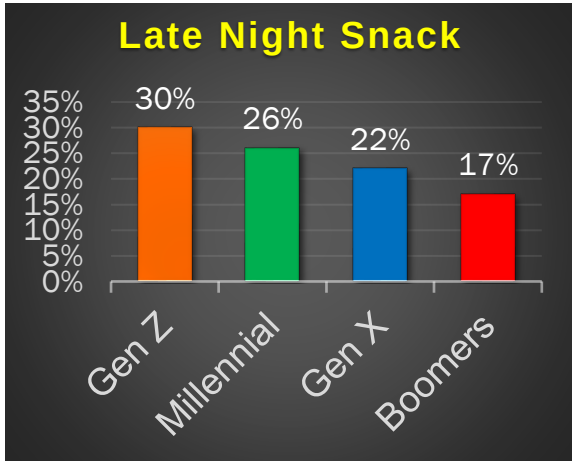




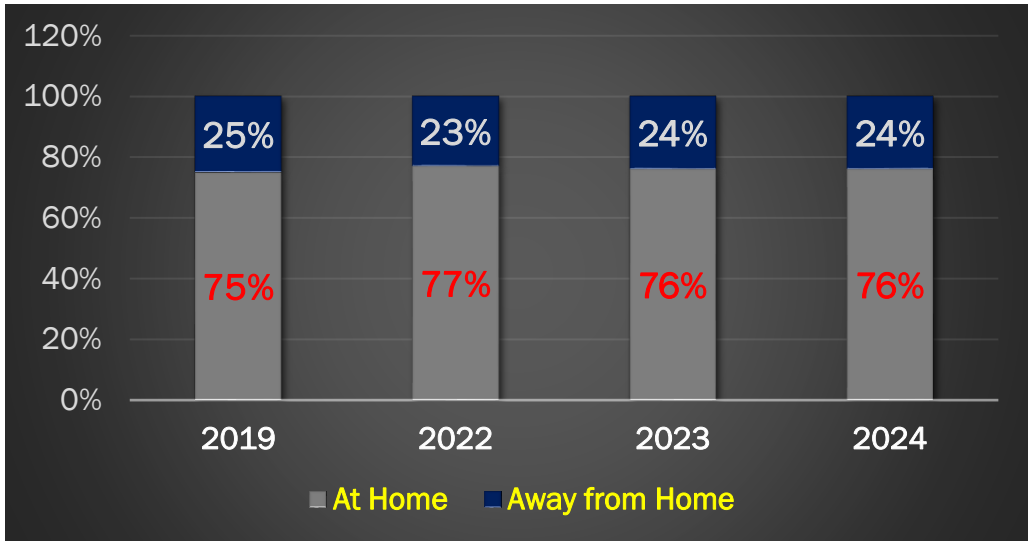


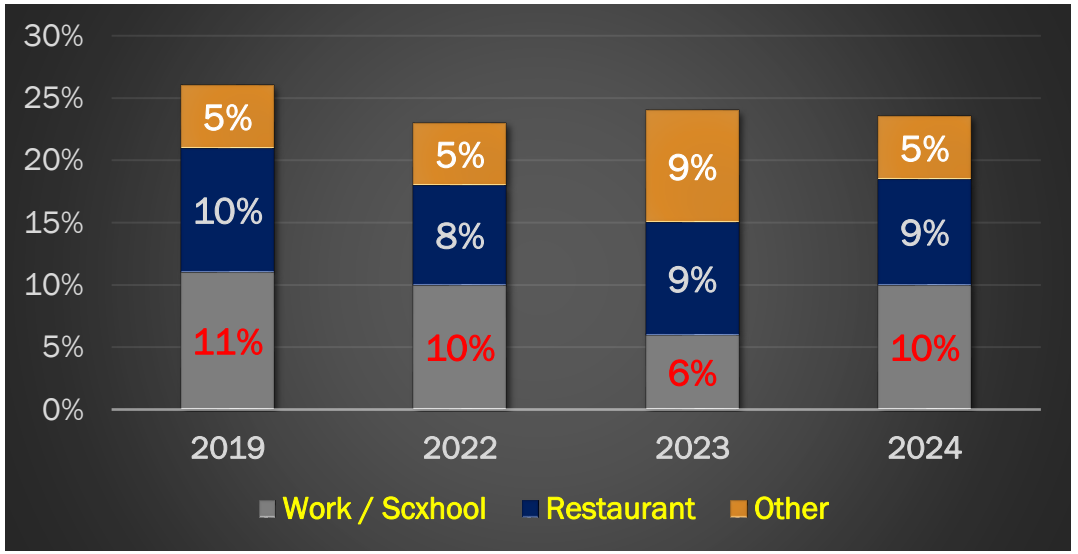




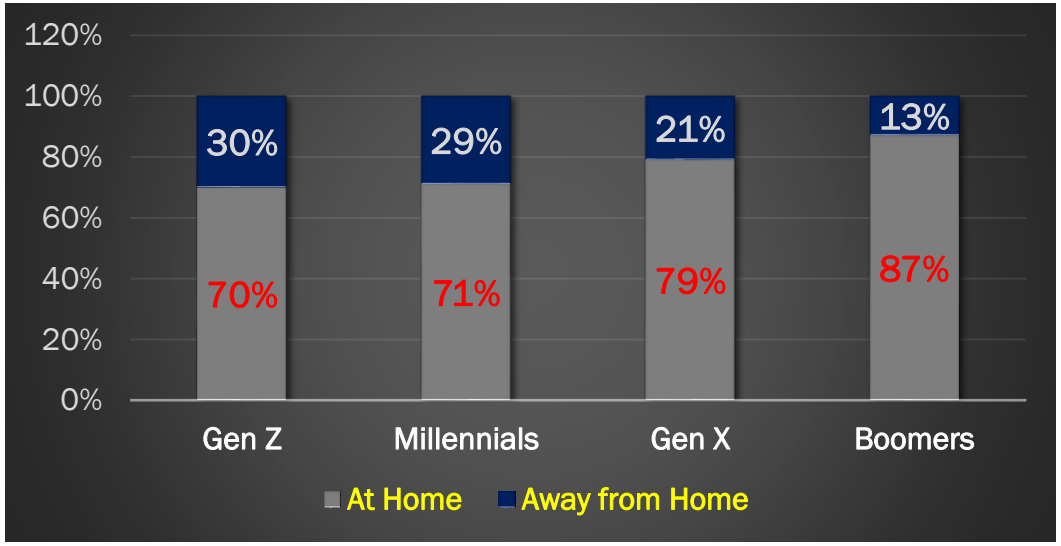


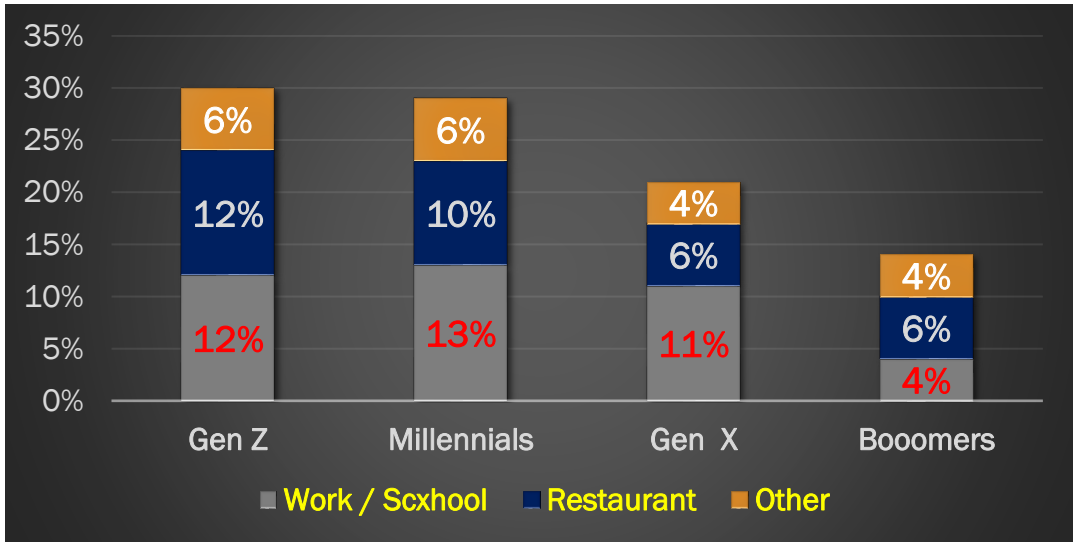
LOCATION OF EATING OCCASIONS



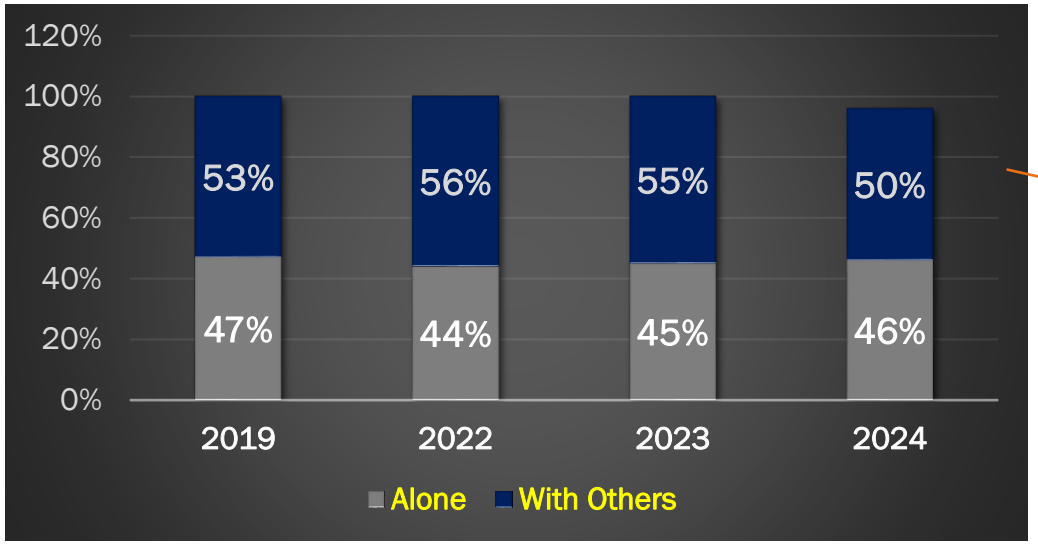


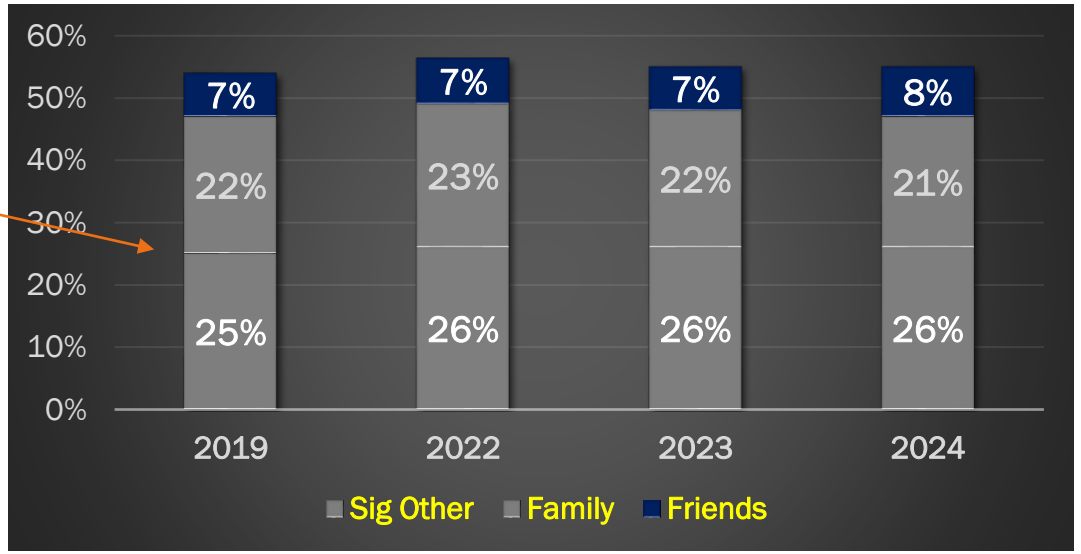
LOCATION OF EATING OCCASIONS BY GENERATION



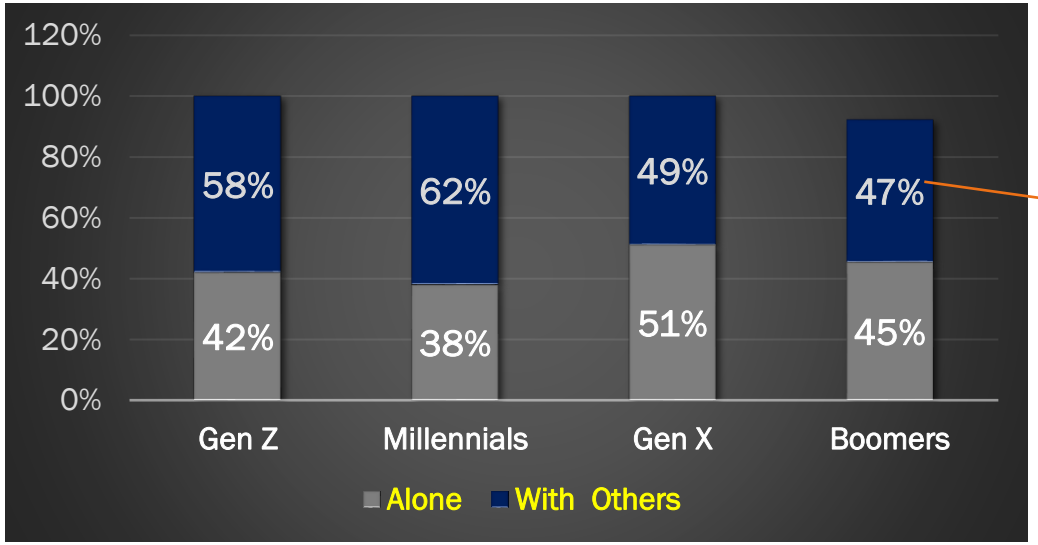


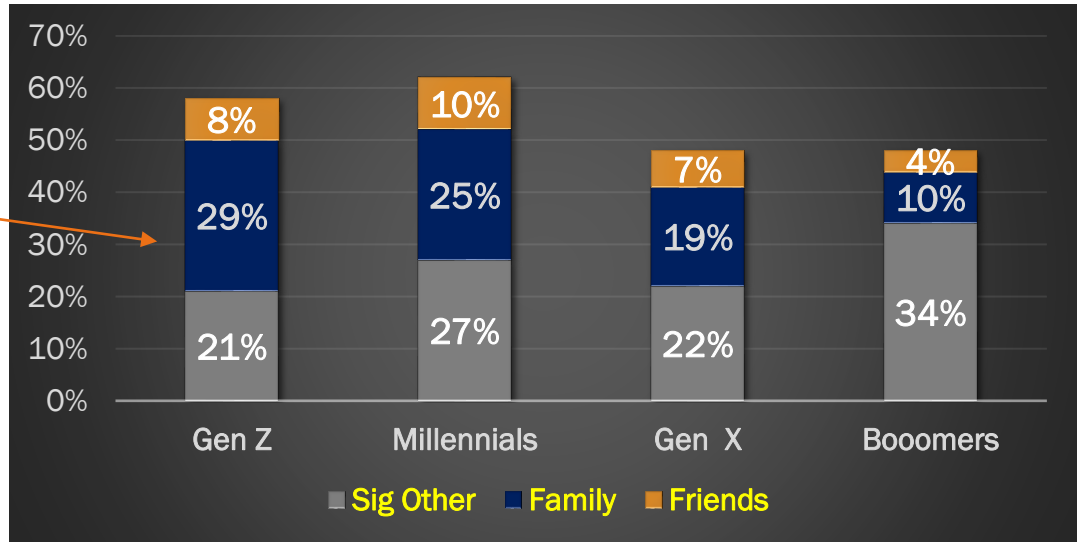
SOCIAL CONTEXT OF EATING OCCASIONS





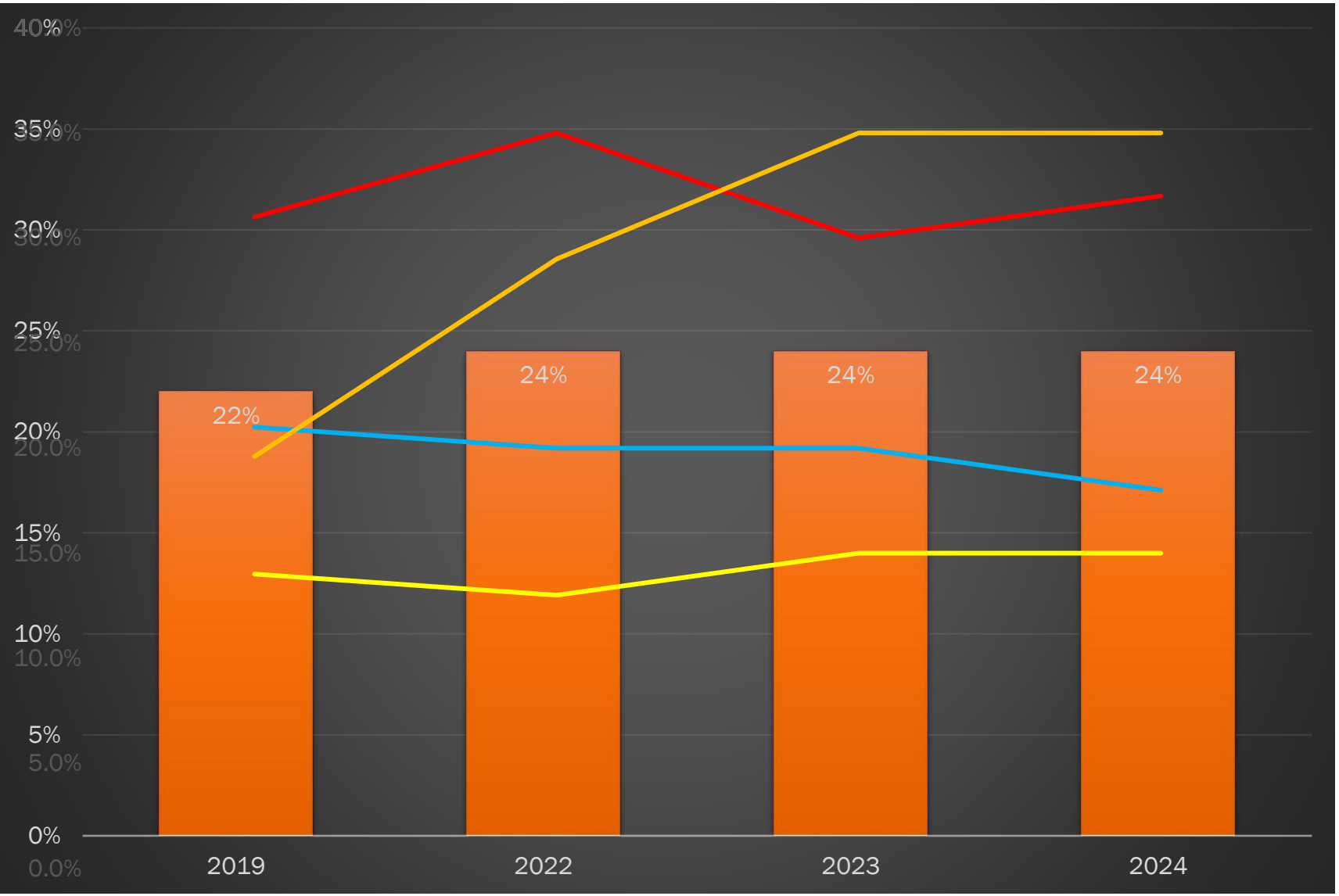
SOCIAL CONTEXT OF EATING OCCASIONS BY GENERATION





SOURCING AND PREPARATION

OCCASIONS THAT TOOK PLACE OR SOURCED FROM A RESTAURANT



Index

Yellow: Boomers

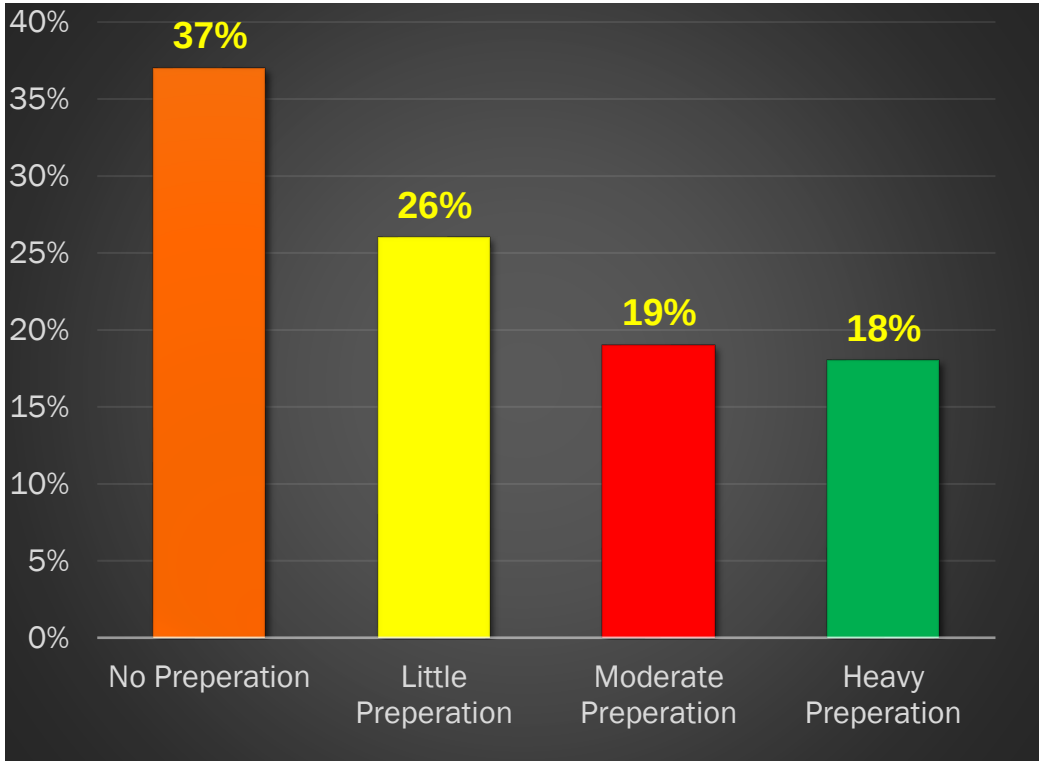
Blue: Gen X

Red: Millennials

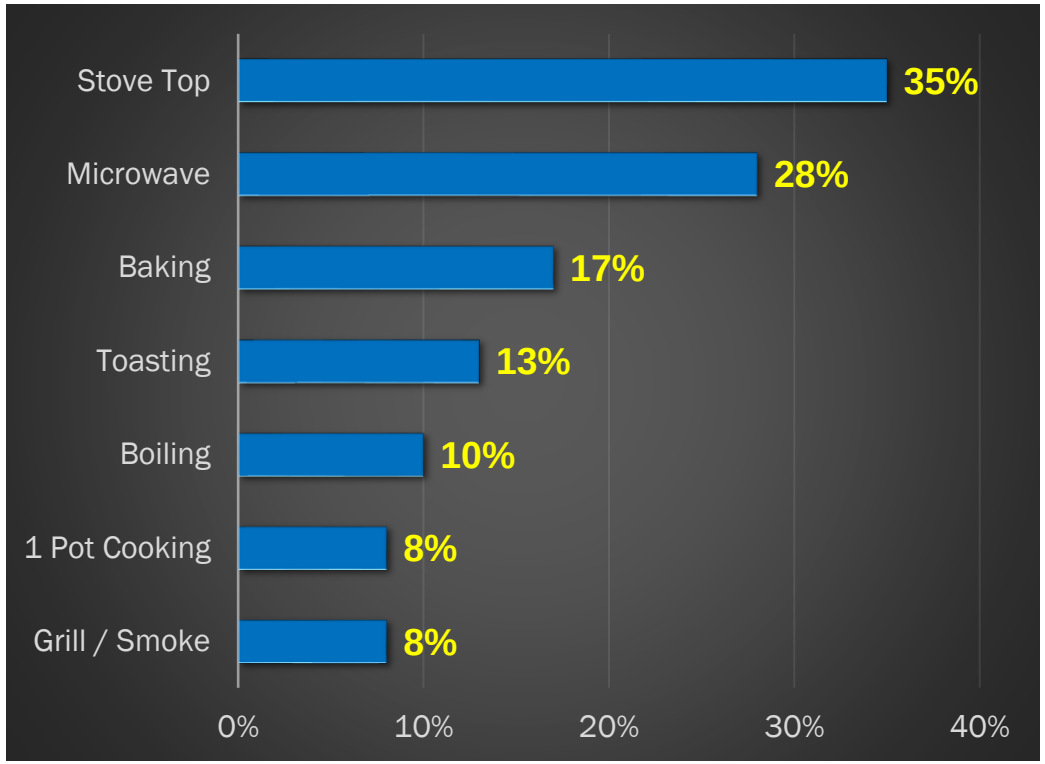
Gold: Gen Z

Generation Z and Millennials are more inclined to source their meals from Restaurants.

DEGREE OF PREPARATION



TOP 7 PREPARATION METHODS



Note: When not sourcing from restaurants, Gen Z and Millennials are more inclined to engage in extensive and versatile preparation methods than Gen X and Boomers. These generations over index when it comes to heavy preparation. Boomers over index when it comes to little preparation.

CONSUMER NEEDS – THE WHY

- **When setting out to eat or drink, consumers most often seek delight if they are more than just hungry.**

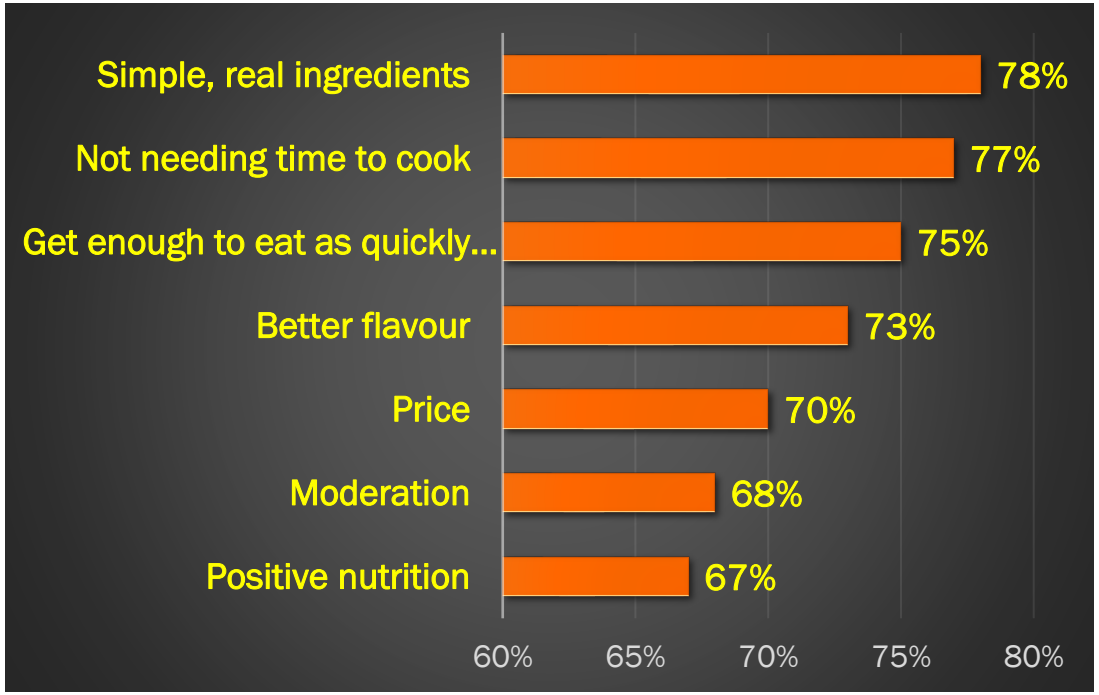
TOP 7 FEELINGS PRIOR TO EATING



Younger generation tend to exhibit a broader range of emotions prior to eating than older generations. Ie: Tired / bored.

- **Needs related to freshness, convenience, and flavour remain the most important for consumes across occasions.**

TOP 7 CONSUMER NEEDS STATES



These consumer needs have stayed constant since 2023

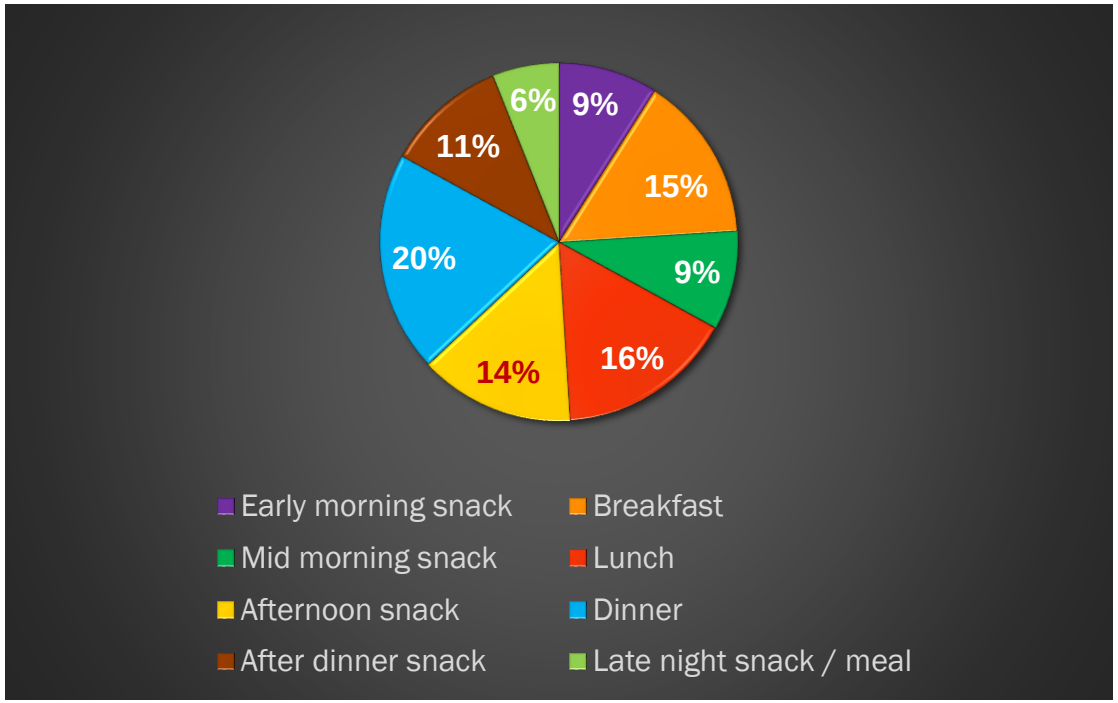
DAYPART DASHBOARD

TOP 4 CONSUMER NEEDS THROUHOUT THE DAY

Early Morning Snacking	Breakfast	Mid-Morning Snack	Lunch	Afternoon Snack	Dinner	After Dinner Snack	Late – Night Meal /Snack
Simple Real Ingredients	Simple Real Ingredients	Get enough to eat and drink as quickly as possible	Simple, real ingredients	Get enough to eat and drink as quickly as possible	Simple, real ingredients	Not needing time or energy	Not needing time or energy
Not needing time or energy	Not needing time or energy	Not needing time or energy	Get enough to eat and drink as quickly as possible	Simple, real ingredients	Better Flavour	Iconic brand experience	Get enough to eat and drink as quickly as possible
Get enough to eat and drink as quickly as possible	Get enough to eat and drink as quickly as possible	Simple, real ingredients	Not needing time or energy	Not needing time or energy	Not needing time or energy	Simple, real ingredients	Iconic brand experience
Better Flavour	Positive nutrition	Price	Better flavour	Price	Get enough to eat and drink as quickly as possible	Better Flavour	Better Flavour

- **A deeper understanding of daypart dynamics can be a key to maintaining relevance and unlocking new opportunities**

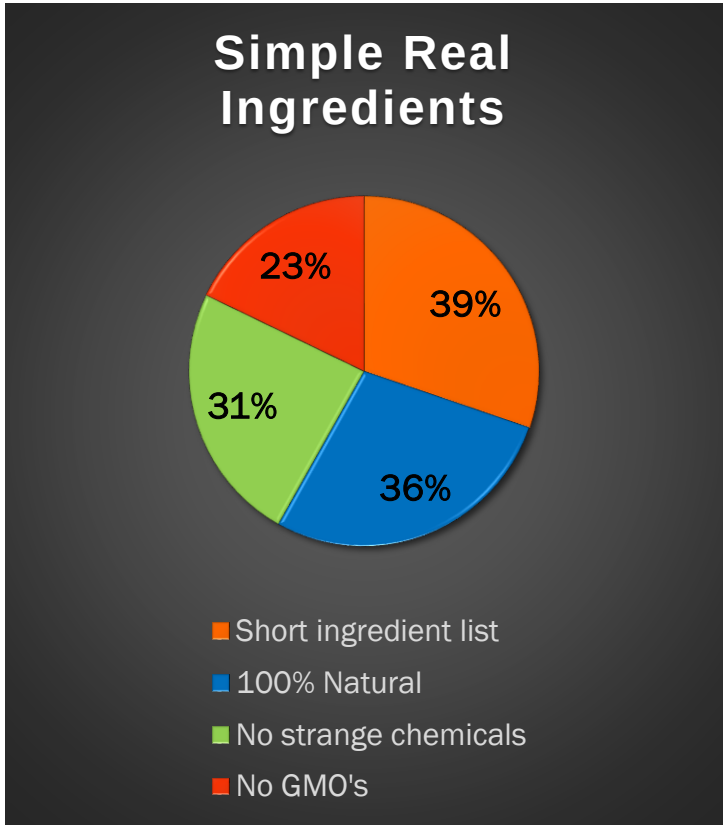
DAYPARTS EATING OCCASIONS SHARE

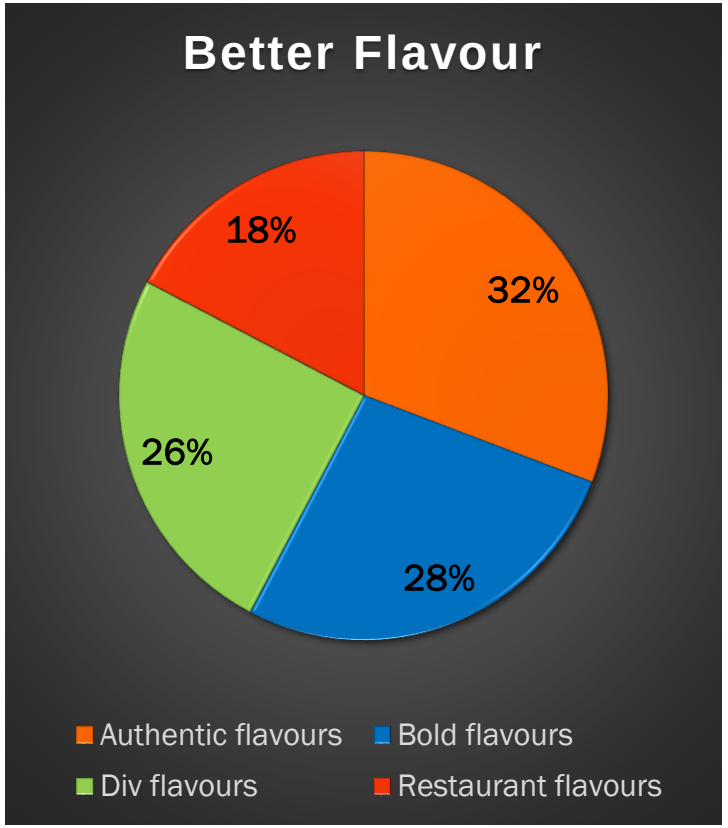


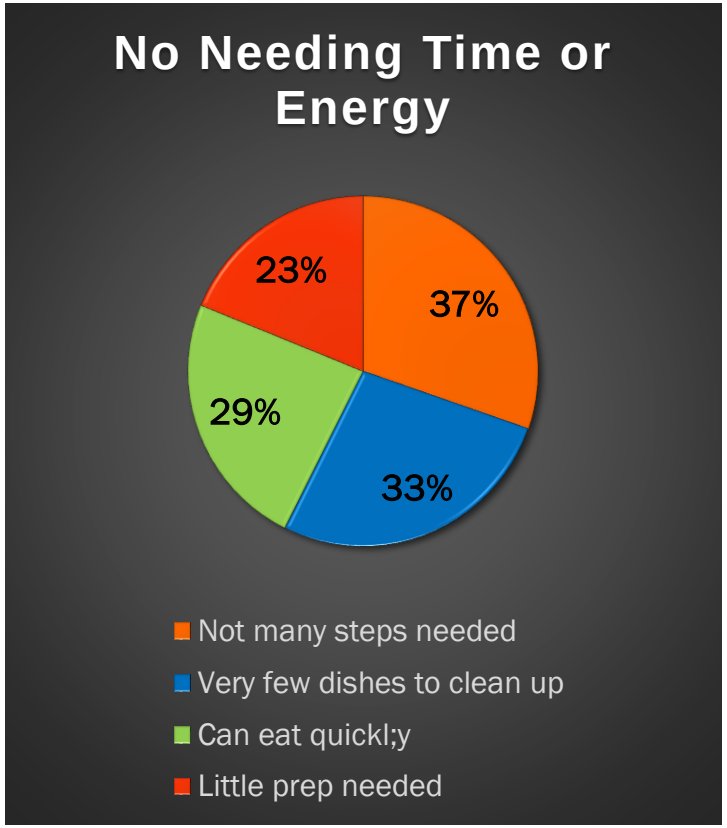
DAYPART SIZE OF EATING OCCASIONS

Early Morn Snack	Breakfast	Mid-morning Snack	Lunch	Afternoon Snack	Dinner	After dinner Snack	Late-night snack / meal
33.4B	56.6B	32.7B	60.5B	52.7B	74.2B	41.9B	21.5B

FOODS SPECFIC NEEDS DASHBOARD

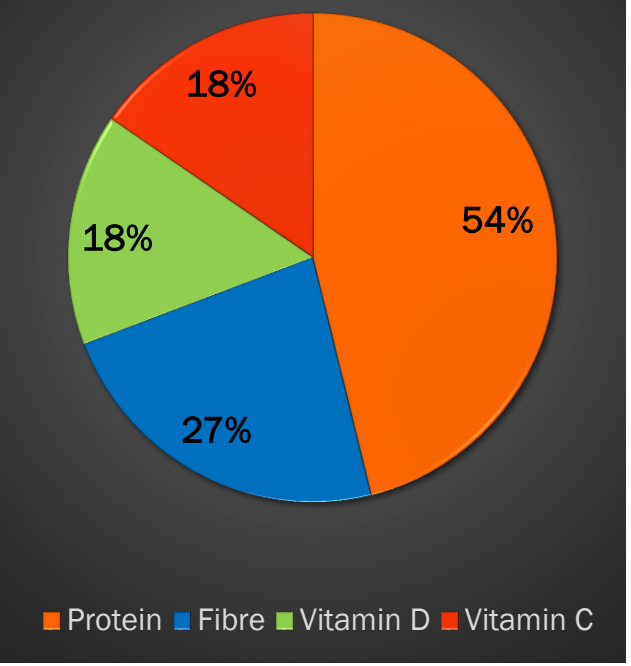




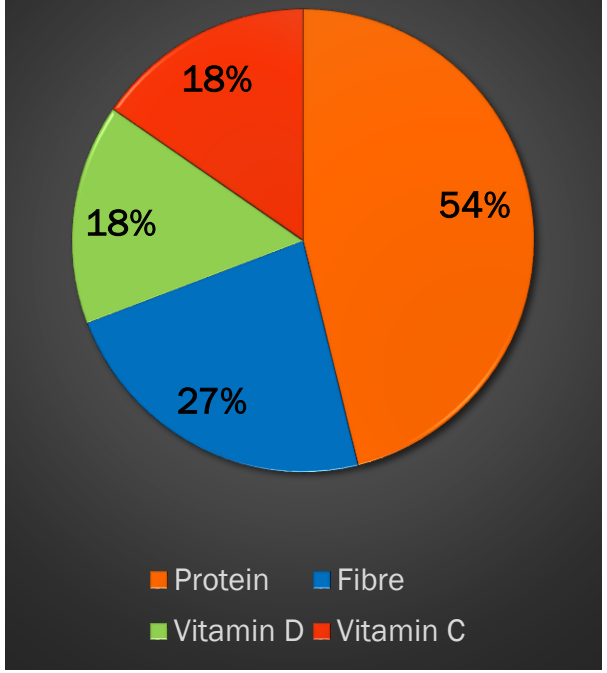


FOODS SPECIFIC NEEDS DASHBOARD

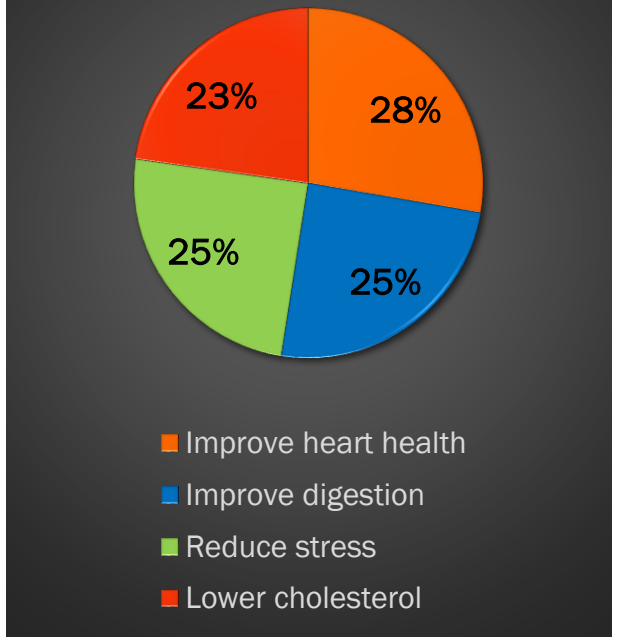
Positive Nutrition



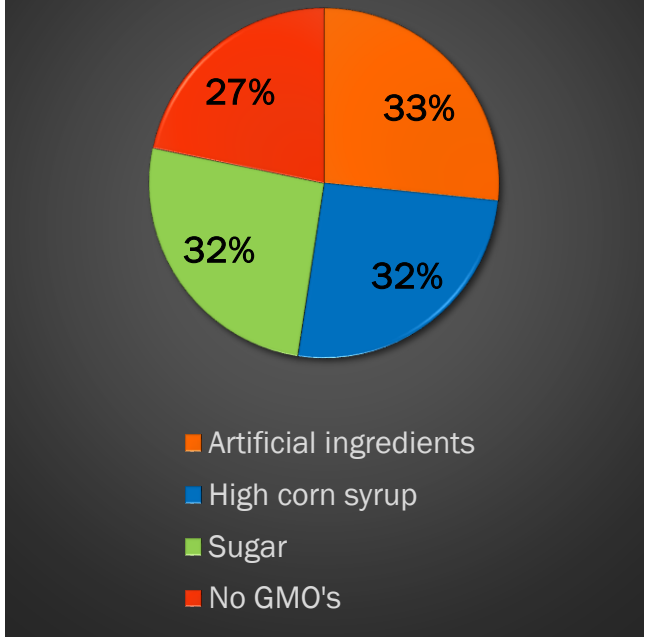
Moderation



Specific Health Benefits



Absence of Negatives



FOOD DISTRIBUTION GUY'S - 3 BRAND STRATEGIES: SALES PERSPECTIVE

1. *Brand's must have a distinct target audience.*
   There are distinct eating and drinking differences among all generations.

2. *Brands must position themselves as a snack / meal, or both if possible.*
   Close to 50% of all eating occasions are snacking.

3. Brands must understand and emphasize how versatile their product is for dinners.
   Dinners are the most relevant meal among all 4 generations, yet key preparation factors exist.

FOOD DISTRIBUTION GUY PROFILE

RICHARD BAKER



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Richard is the Founder and President of Food Distribution Guy, a CPG consultant-based sales and marketing service for small to medium size Canadian and International food brands seeking to expand distribution in Canada's grocery sector.

MY ROLE IS TO MAKE YOUR BRAND RELEVANT IN THE CANADIAN MARKET!.

Through customized insightful analyses and reports he creates:

1. Canadian Grocery Sector Overview
2. Canadian consumer Insights
3. Canadian Category Reviews
4. Canadian Market Assessments
5. Competitive Retail Store Audits.

to provide clients with a better understanding of the market, their competition, the consumer landscape, and how best to navigate entry into Canada's grocery sector. In addition, Richard helps his clients create their "Go To" sales and market strategy.

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