We are living in a food culture renaissance: almost three-quarters of consumers are "food engaged"

The consumers’ desire for better quality is rapidly becoming an everyday expectation. Culture of Food 2015 is a framework for understanding how consumers define premium quality and make decisions about premium products, brands and experiences.

This report is a deep dive into America’s diverse and dynamic food and beverage culture as viewed through the lens of the consumer. It explores the messy and yet-to-be articulated opportunity spaces in our food and beverage culture that are fertile hunting grounds for innovation in products, services and menus.

For over 25 years The Hartman Group has been tracking a fundamental shift in food and beverage culture. We are eating and drinking alone more and snacking more. Our planning horizon for deciding, shopping and preparing foods has compressed to an expectation for “planned spontaneity.” At the same time, many of us have elevated expectations about our food and beverage experience, with “foodie” activities infiltrating mainstream eating in uneven ways.

Today, inspiration, whims, stress levels and in-the-moment cravings dictate an increasing number of everyday food and beverage occasions. As we outsource the work of food and beverage to others (retailers, food service and manufacturers), we are no longer bound by our family food traditions, nor are we limited by our own cooking skills. With fewer traditional rules to discipline our choices and routines, how are we inspired to choose what to eat or drink and whether or not to cook on different occasions? And how does who we are shape how we choose? Culture of Food 2015 provides the answers to these, and many more business critical questions.
EXECUTIVE SUMMARY

Introduction

Culture of Food: New Appetites, New Routines is a deep dive into the World of Food today. The Hartman Group’s Digital Food Life 2014 report uncovered how food is now a cultural product to discover, share, make and trade. This new report details how consumers are trading out traditional food routines for new ones that reflect the desires and challenges of expanded variety in a complex food landscape.

Fundamental shifts in technology, travel and trade have placed food back at the center of everyday life and popular culture. Food is fun and important. Interest in food isn’t a mere Millennial trait but a reflection of evolving food culture.

The meaning of “fresh” is evolving from less processed towards transparency

Transparency is a small but growing driver of evolving ideas about fresh. Fresh, less processed (FLP) continues to be the dominant consumer frame for understanding and procuring higher quality in food. But those who are most engaged and influential in the World of Food now associate higher quality with knowing where food comes from and who made it. In the future, transparency is poised to align with a deeper understanding of “fresh” beyond less processed (what’s in it).

This shift toward deeper interest and participation in food culture is not just a Millennial trait but a true cultural shift. Food-engaged influencers across generations increasingly insist that FLP food experiences must connect participants more actively with food creation. Food is a cultural product to discover, share, make and trade. Consumers want to participate with food.

Cities from Pittsburgh to Kansas City and Los Angeles are redefining local food culture to be food of their people, by their people and for their people. When urban cores reach critical population density and diversity, they become incubators for authentic culinary experimentation, entrepreneurism and innovation. Consumers are increasingly trading out mass food brands and chains for these unique, local and fresh food experiences. They want to be closer to their food!

New food routines reflect desire for expanded variety

The everyday “foods I grew up with” used to be foods for life. Now they are often relegated to comfort foods for special occasions as consumers add new foods, dishes, flavors and ingredients to their everyday consideration set. Innovative food service, specialty retailers

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Topics covered include:
- Who’s engaged in food culture
- How consumers choose among the array of readily available global flavors and wellness-inspired eating styles
- How consumers understand and look for variety and higher quality
- How consumers make daily decisions to eat in vs. eat out
- What consumers do when they break from their routine
- How consumers go about deciding when and what to eat, based upon daily activities and/or what was eaten earlier and what might be eaten later
- How consumers connect with sources of inspiration to find creative variety and whimsy

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and new brands inspire consumers to participate in new food experiences that are often higher quality.

Desire for this expanded variety is expressed through wanting new/interesting foods that engage consumers in culinary, wellness and fresh food experiences, while creating deeper connections to food (transparency). Eating more local and seasonal vegetables and fruits in varied preparations is a real and symbolic way consumers are expanding their everyday food repertoire. “Ethnic” foods often represent ready-made forays in eating more fresh and flavorful vegetables.

Trending of vegan is less a commitment to a plant-based lifestyle and more an exploration and celebration of a plant-centered approach to cooking and eating. Paleo, which is thought to be on the other end of the eating spectrum, also incorporates a diversity of vegetables onto consumers’ plates. Moreover, both vegan and paleo approaches engage consumers in deeper examination of sourcing and animal welfare.

This aspiration to eat more vegetables has for many consumers become a site of struggle and guilt, especially for those with children.

New food routines accommodate disruptions and contingencies

Consumers eat around their schedules rather than scheduling around mealtimes. Dinner becomes a mere pause between other activities. Lunch is often scheduled out to accommodate an overflow of meetings and must-do’s. And breakfast can be multitasked between commuting and working. This is our modern time deficient.

The ad hoc approach to mealtimes is increasingly part of the new routine. While dinner remains an important social meal occasion, breakfast and lunch occasions are routinely “snackified,” especially during the workweek. This opens up schedules and frees up time from planning, cooking and cleaning.

On these no-cook occasions, consumers are eating a mix of packaged and prepared foods (yogurt cup, deli sushi/sandwiches) with some fresh ingredients (snacking fruit, salad bar). Or they may outsource these low-stakes occasions to food service. Eating out is not just for special occasions but an everyday approach to “getting food.”

New routines necessitate new ways of cooking

Cooking is becoming a skill consumers aspire to develop, not just a domestic (previously gendered) chore. Cooking is seen as a basic life skill, cultural capital, geek exploration, life passion and participation in fresh as less processed and transparency. This is not to say consumers want to cook all the time but that they want to have the choice to cook

WORLD OF FOOD SEGMENTATION

Consumers orient differently to the World of Food based on the intensity of their engagement with broader food culture.

For the World of Food, we identified three consumer segments that cover the spectrum of intensity from low to high, based on involvement in food culture. We find a consistent gradient from Periphery to Core in terms of attitudes, preferences, orientations and behaviors. Primary dimensions used in this segmentation include price sensitivity, aspirational approaches to food and underlying indicators of food passion.

Core Food Engaged (10%) is the smallest and most intensely involved segment—they are early adopters, trendsetters, evangelists and highly food literate.

Mid-level Food Engaged consumers (63%) represent mainstream consumers—they actively seek new food experiences and provide greater articulation around distinctions such as local, seasonal and global.

Periphery Food Engaged consumers (27%) are the least engaged in the World of Food—they seek comfort and sustenance more than knowledge.
or to outsource to food companies, retailers and food service. An appetite for fresh and interesting foods inspires consumers to learn about new ingredients, flavor combinations and techniques. Rather than help with planning and list making, they are looking for food inspiration and cooking tips to simplify or improve their investment of time, effort and money.

**New routines can be stressful when eating from a complex and dynamic food landscape**

Desire for expanded variety can lead to anxiety about having too many choices, especially for consumers less engaged in food culture. Raised cultural expectations for new and interesting food experiences mean consumers can’t just serve the same limited rotation of dishes from their family recipe binder if they want to be culturally relevant and perceived as a good cook.

Without familial rules guiding what to eat in an anything-goes food culture and with so many compelling and competing ways of eating (vegan to paleo, meals vs. snacks, social vs. alone eating), the question of “what’s for dinner?” can be fraught with indecision.

For the cook, this “paradox of choice” is conflated by fragmented taste aversions, preferences, allergies, sensitivities and intolerances of eaters. Picky eating constrains shared eating. For consumers who have customized avoidances and preferences, social eating can derail them from eating “the way I need to eat.”

Those consumers most intensely engaged with broader food culture are able to navigate the complex and dynamic food landscape with great ease and fun. However, a vast majority of consumers are seeking inspiration, information, skills, tips and a little help.

**New routines can elevate the experience of eating alone**

Living and eating alone can make it harder to plan, shop, cook and feed oneself, especially for consumers who are less engaged in food. Cooking used to happen in families and was often a shared and communal responsibility. Cooking is often less fun and rewarding with no one else to appreciate food and leftovers that need to be eaten again and again.

Consumers who live alone are seeking more fun, inspiring and practical approaches to cooking for one. Bloggers with special dietary filters often approach cooking as a personalized and customized project for one. Fresh food formats such as the meal-replacement smoothie or juicing is a convenient and cost-effective way for alone eaters to acquire the nutritional density of a multi-dished family meal.
Specially retailers and brands such as Trader Joe’s offer fresh food formats designed to be modular – good for one or more. New fresh fast food formats such as Chipotle and Munchery are designed for the alone eater who can customize and personalize their meals.

World of Food segments experience different challenges and trade offs

Everyone appears to need inspiration to support their desires for variety, but underlying needs vary dramatically. Mainstream Mid-level consumers pass through their days and weeks knowing they want to include new experiences at mealtimes, but not knowing in advance when they will elevate this need; when the urge arises, they need help figuring out what they can make and how.

Core Food Engaged consumers typically think further out and have an idea or a starting point, sometimes drawing inspiration from what they already have in their pantry or fridge, sometimes looking further afield in their ongoing experiences of food culture. Their challenge is to figure out how to use ingredients they have on hand or where to locate a needed ingredient.

What counts as a successful solution varies as well. Mid-level are less willing to give up “healthy,” whether it’s delivered explicitly or implicitly through FLP, while Core often elevate flavor and demote “health” even further, even if they happen to get both in tandem. Core Food Engaged seek intense flavor, culinary distinctions and a connection with the sourcing and production of their food. They seek variety with purpose. They don’t go out to eat because they lack ideas. They go out to satisfy a specific craving or to connect and co-create with the World of Food.

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