



## 2023: HAVE WE DITCHED DAY PARTS? MEET THE "MEALTIME OUTSIDERS." ALL 32M OF THEM

**The new year hit hard.** Bringing with it trends and behaviors that accelerated during the pandemic-turned-endemic, as well as new ones.



**Everything is a bit blurry.**  
The lines between work and home, Sunday and Monday, breakfast and snack are barely visible anymore.



**We've ditched day parts and loosened rules.**  
Rigid schedules? Dated day parts? *No thank you.* Snack for breakfast? *Yes, please.* Waffles for lunch at 2:30 pm. *Why not?*



**On-premise dining has decreased.**  
But takeout and delivery are increasing (convenience is the new currency, after all).



**Though we've started venturing out more —**  
slowly...be it to restaurants and concerts, galleries and galas, cities and countries.



**We're as stressed as ever.**  
Inflation, food uncertainty, climate issues and global uncertainty are all on the rise. Not to mention the R word. Is the recession coming? If so, when and for how long?

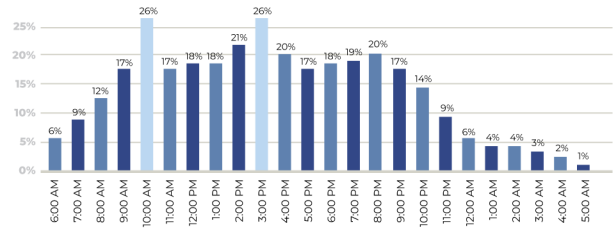
## MOST OF THESE BEHAVIOR CHANGES HAVE BEEN IN THE WORKS A WHILE

**But no one's looked at who's ditching the day part. So we took a deeper dive into who they are, what's driving their new patterns, and how to best serve them.**

## WE CALL THEM MEALTIME OUTSIDERS. WHAT ELSE WE DISCOVERED ABOUT THEM

They come from all ages, life stages and regions of the U.S. They're male and female, married and not, with and without children. Most work full time. **46% primarily work out of an office or company location, 19% from home.** But most of all, they've ditched yesterday's breakfast, lunch and dinner schedule.

### Most outside meals take place at 10 AM & 3 PM



**Mealtime Outsiders dine out 2+ times a month and eat at "off" hours (between 8 pm-7 am, 10-11 am and 2-5 pm)**

## WHAT WE DISCOVERED ABOUT THEM



**41% cook for fun**



**16% cook multiple times a week**



**27% bought cooking accessories in the last 6 months (air fryer?)**



**14% own a smoker**



**27% rely on food-related apps**



## KEY DRIVERS FOR OFF-HOUR EATING: WORK, LIVING ARRANGEMENTS AND THE DESIRE TO DESTRESS

**FUN FACT:** THE 3-MEAL A DAY SCHEDULE CAME FROM EUROPEAN SETTLERS AND WAS CEMENTED DURING THE INDUSTRIAL REVOLUTION

## WHAT THEY HAD TO SAY:



*"Lots of work assignments thrown in my direction prevent me from eating on time throughout my workday."* Male, Black, 45, married w/kids, NY

*"My job, the amount of time I spend working is the main reason as to why my ideal time to eat changes because some days it's light work and others it's long and grueling."* Male, Black, 42, single/no kids, TX

*"Something urgent occasionally happens and I don't get to eat when I'm actually hungry."* Female, 25, Asian, single/no kids, IL



*"I'm busy during the day so I tend to eat later at night and I'm gaining weight."* Male, 33, White, single/no kids, CA

### Mealtime Outsiders are pulled in a gazillion directions.

Like most of us, they don't have as much control over that as they'd like. They deal with it, but not without compromise. Giving them more flexibility and control could be an opportunity in 2023.

## HOUSEHOLD COMPOSITION PLAYS A PART

Whether they're deciding solely for themselves, or with those they're sharing space, time, energy and schedules informs their eating habits, too.



*"I live by myself, so I can eat when I want, and what I want."*

Female, 48, White, single/no kids, CA



*"My eating schedule depends widely on what activities my family has in a day."*

Female, 35, White, married w/kids, MO



*"My husband and I are both retired so we are no longer bound to a schedule. Our meals are taken at times that are convenient for us or when we are hungry."*

Male, 68, White, married/no kids, IL

**"I HAVE TO DEAL WITH A PARTNER WHO EATS AT WEIRD HOURS. I EITHER EAT WITH HER OR I JUST EAT ALONE. MOSTLY EAT ALONE LATELY."**

MALE, 70, WHITE, PARTNER/ADULT KIDS, FL

**"STRESSING ABOUT WHEN WE EAT SEEMS SMALL COMPARED TO OTHER ISSUES."**

FEMALE, 42, WHITE, MARRIED W/KIDS, TX

## EATING SCHEDULES ARE JUST UNNECESSARY STRESS

With so much going on in the world, mealtime is the last thing they want to worry about. They know the world won't end if they don't eat at a specific time.

With everything that's happened in the last three years, and what may be looming ahead, they're looking for ways to simplify and regain control. They'd rather eat when hungry, not at a set time.



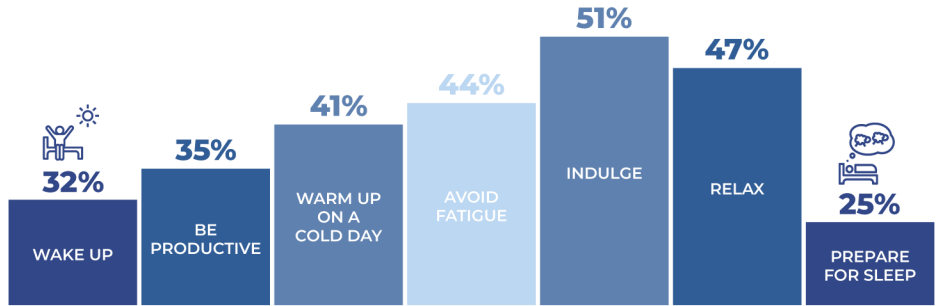
**52%** of our respondents believe that sticking to a specific eating schedule is stressful



# BOTTOM LINE: EATING IS LESS ABOUT TIME OF DAY AND MORE ABOUT STATE OF DESIRE

**Early in the day, convenience and sustenance are key.** As the day progresses, indulgence becomes more common. Mealtime Outsiders are relying on food not just as fuel, but as a way to help them meet the moment, whether that's to focus, relax, cool off on a hot day, warm up on a cold one, or ease into sleep.

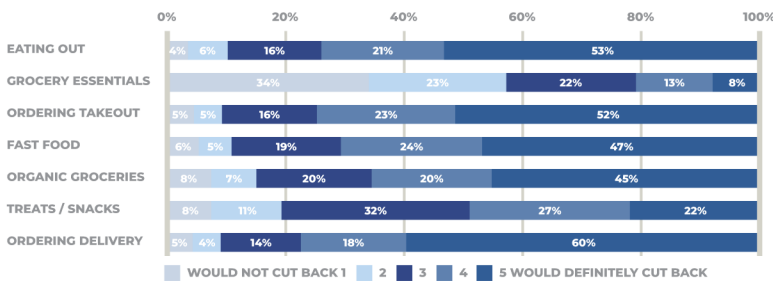
## HOW FOOD MOVES MEALTIME OUTSIDERS THROUGH THE DAY



## Mealtime Outsiders want to go with the flow, but money is a major concern for everyone.

When it cuts into the food budget, delivery and eating out are the first and biggest areas of cutback, followed closely by takeout. But, Mealtime Outsiders are not afraid of trying to recreate meals they've had out at home. Meal kits, anyone? *Might not be a bad idea...*

### In a time when your finances are tight, which of the following are you likely to cut back?



## FIND WAYS TO FEEL MORE "ESSENTIAL" OR RISK BEING FIRST ON THE RECESSION CHOPPING BLOCK

## DUALITY IS DE RIGUEUR.

### The days of either/or are long over.

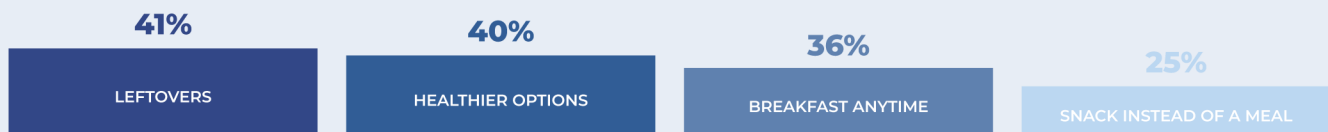
Restaurants and retailers who get ahead of these paradoxical priorities can become a regular part of a Mealtime Outsiders' evershifting routine. Are your afternoon omelets big enough to also be tomorrow's early-morning or late-night snack? That could make you pretty popular. An artisan sandwich shop with a retail boutique inside? Brilliant.

## KEY TAKEAWAYS FOR FOOD & BEVERAGE BRANDS:

### Our research indicates that now's the time to be more creative in how you present your brand and your offering.

Meals that stretch can help ease financial concerns. Healthy (or healthy-ish) late-night snacks provide a sense of control. Mealtime Outsiders are looking for ways to maintain the flexibility they need to meet the demands of the day, and the moment. Giving them that could make you indispensable.

### WHAT MEALTIME OUTSIDERS MOST WANT TO SEE OFFERED IN THE OFF-HOURS



SOURCES: Partners + Napier, 2022. Mealtime Outsider Survey, SUZY; MRI-Simmons