Food

Category Essentials: Spring 2023



COLLAGE
GENERATIONS

Collage Group, Category Essentials Survey, Fielded June 2023

18-77 Unweighted Survey Sample Breakdown, n=4,930

Race/Ethnicity	
Hispanic	1104
Black	943
Asian	560
White	2217

Gender	
Woman	2528
Man	2372

Generation	
Gen Z	680
Millennial	1621
Gen X	1356
Boomer	1273

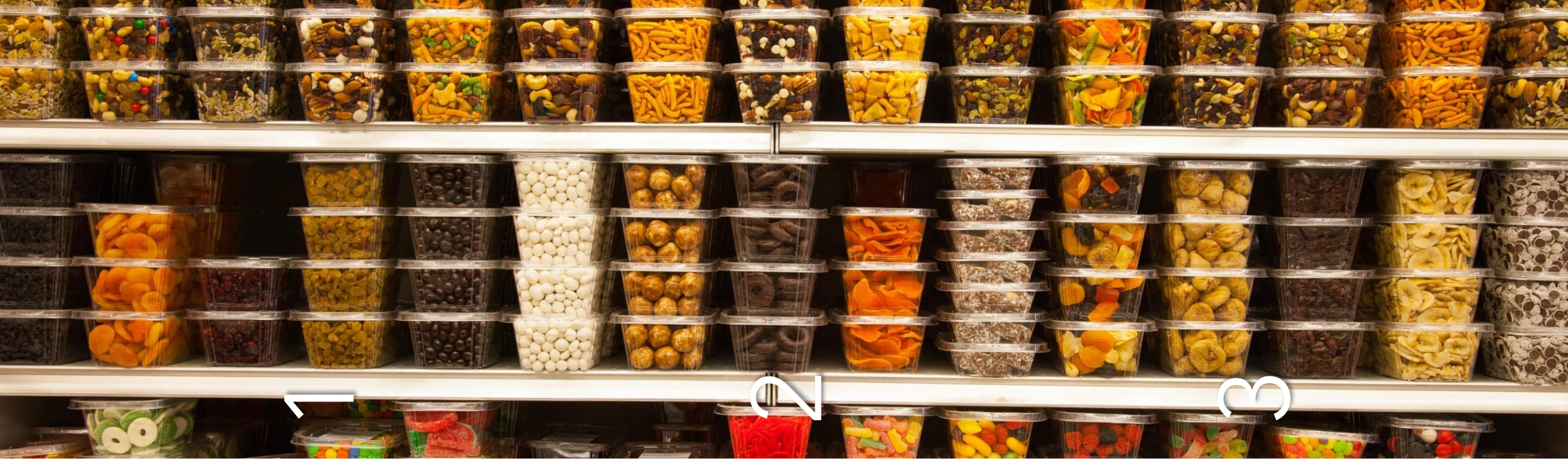
Hispanic Acculturation	
Acculturated	343
Bicultural	456
Unacculturated	305

LGBTQ+	
LGBTQ+	620
Non-LGBTQ+	4310

Please note that weighted data present in this report is weighted to be nationally representative of Race/Ethnicity, Hispanic Acculturation, Age, Gender, and Sexuality.

COLLAGE GENERATIONS

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1

Consumption

2

Drivers

Category & Product

3

Shopping

Information Gathering

Price & Promotion

Location

COLLAGE GENERATIONS

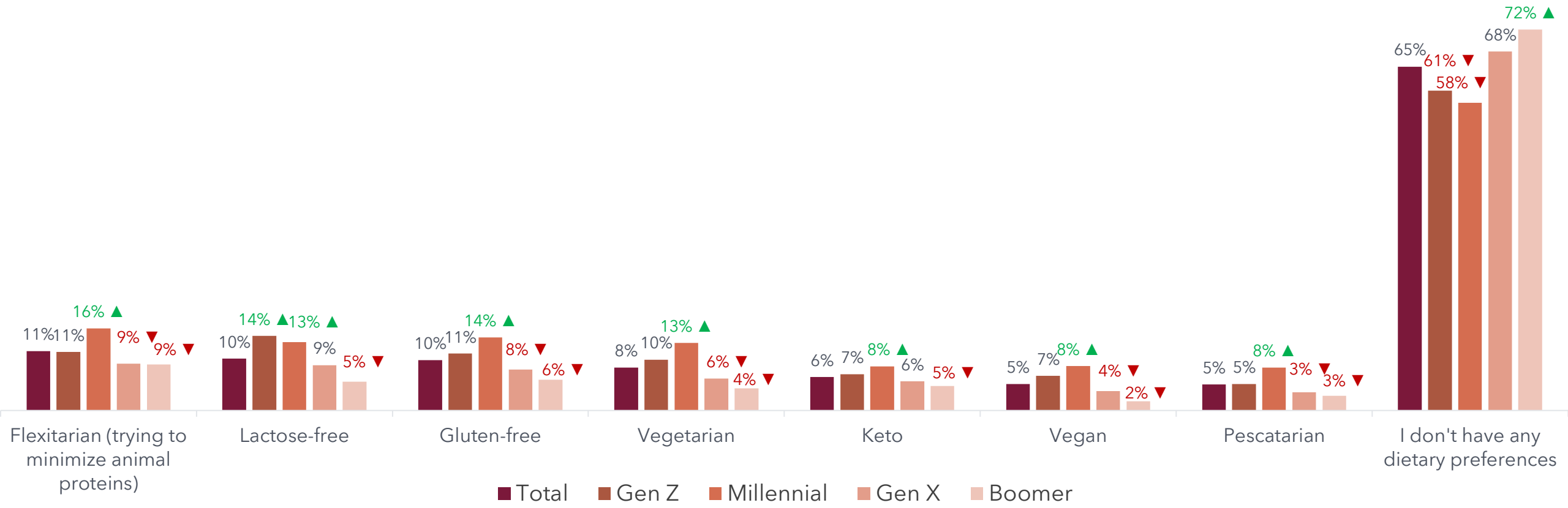
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Key Takeaways and Action Steps: **Food Consumption**

Know This	Do This
While most Americans don't have any dietary preferences, Millennials and Gen Z are most likely to say they do. Millennials are particularly likely to say they are "flexitarian", meaning that they try to minimize animal protein consumption. Gen Z is most likely to say they are lactose-free.	• **Practice product inclusion.** Understand that while overall prevalence is low, dietary restrictions and preferences are on the rise as younger consumers increasingly become primary household purchasers. • **Ensure you are meeting the expectations and needs** of younger consumers by **clearly stating allergens** and making options for those with specific preferences clear in your product marketing.
There is a generational divide when it comes to food consumption, across mealtimes. Gen Z and Millennials are significantly more likely than older generations to say they eat their meals on the go or at restaurants, while Gen X and Boomers overwhelmingly say they eat meals at home.	• **Keep younger generations' on-the-go lifestyle in mind** by focusing on partnerships with delivery services or providing packaging options that make mealtime manageable, even away from home. • **Cater to older generations' at-home eating preferences** by providing recipe ideas or meal kits that make cooking at home fun and enjoyable.

Younger Americans, Especially Millennials, Are More Likely to Have a Variety of Dietary Preferences

Which of the following best describes your dietary preferences?



Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

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Millennials Eat Breakfast Most Often, Frequently Preparing It with Their Kids or "On The Go"

Boomers Almost Always Eat at Home, Younger Gens Frequently Eat on the Go or Get Restaurant Food

Thinking about a typical week, do you do any of the following for breakfast?

	Total	Gen Z	Millennial	Gen X	Boomer
I prepare and eat my breakfast at home	62%	55%▼	57%▼	61%	73%▲
I prepare breakfast at home and eat it "on the go"	21%	30%▲	31%▲	20%	7%▼
I prepare breakfast for my kid(s) at home*	19%	13%▼	33%▲	20%	5%▼
I get carryout or delivery from a restaurant, café, or store/bodega	17%	24%▲	26%▲	13%▼	8%▼
I eat at a restaurant	16%	20%▲	23%▲	13%▼	9%▼
I prepare breakfast for my kid(s) to eat "on the go"	9%	6%▼	17%▲	8%	1%▼
My kid(s) gets breakfast at school*	7%	5%▼	14%▲	7%	1%▼
My kid(s) gets breakfast from a restaurant or store/bodega*	5%	3%▼	11%▲	4%▼	1%▼
I rarely or never eat breakfast	19%	21%	15%▼	20%	21%

COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
*Only asked to respondents who are parents
Significance test: Confidence level 95%. ▲▼ over/under Total

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Gen Z and Millennials Are Distinctly More Likely to Pack Lunch To-Go or Get Food from a Restaurant

Boomers Tend to Eat Lunch at Home More than Others

Thinking about a typical week, do you do any of the following for lunch?

	Total	Gen Z	Millennial	Gen X	Boomer
I prepare and eat my lunch at home	61%	60%	57%▼	57%▼	70%▲
I prepare lunch at home and eat it somewhere else	29%	33%▲	39%▲	31%	14%▼
I get carryout or delivery from a restaurant, café, or store/bodega	26%	34%▲	36%▲	22%▼	16%▼
I eat at a restaurant	22%	27%▲	29%▲	20%	14%▼
My kid(s) gets lunch at school*	12%	6%▼	23%▲	14%	2%▼
I prepare lunch for my kid(s) to take to school*	11%	6%▼	21%▲	11%	2%▼
I rarely or never eat lunch	9%	6%▼	6%▼	8%	13%▲

COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
*Only asked to respondents who are parents
Significance test: Confidence level 95%. ▲▼ over/under Total

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Nearly All Gen Xers and Boomers Typically Prepare and Eat Dinner at Home

Gen Z and Millennials Are More Likely to Get Restaurant Food than Older Generations

Thinking about a typical week, do you do any of the following for dinner?

	Total	Gen Z	Millennial	Gen X	Boomer
I prepare and eat dinner at home	89%	80%▼	87%	91%▲	93%▲
I get carryout or delivery from a restaurant, café, or store/bodega	34%	36%	44%▲	34%	23%▼
I eat at a restaurant	30%	35%▲	40%▲	27%▼	21%▼

COLLAGE GENERATIONS

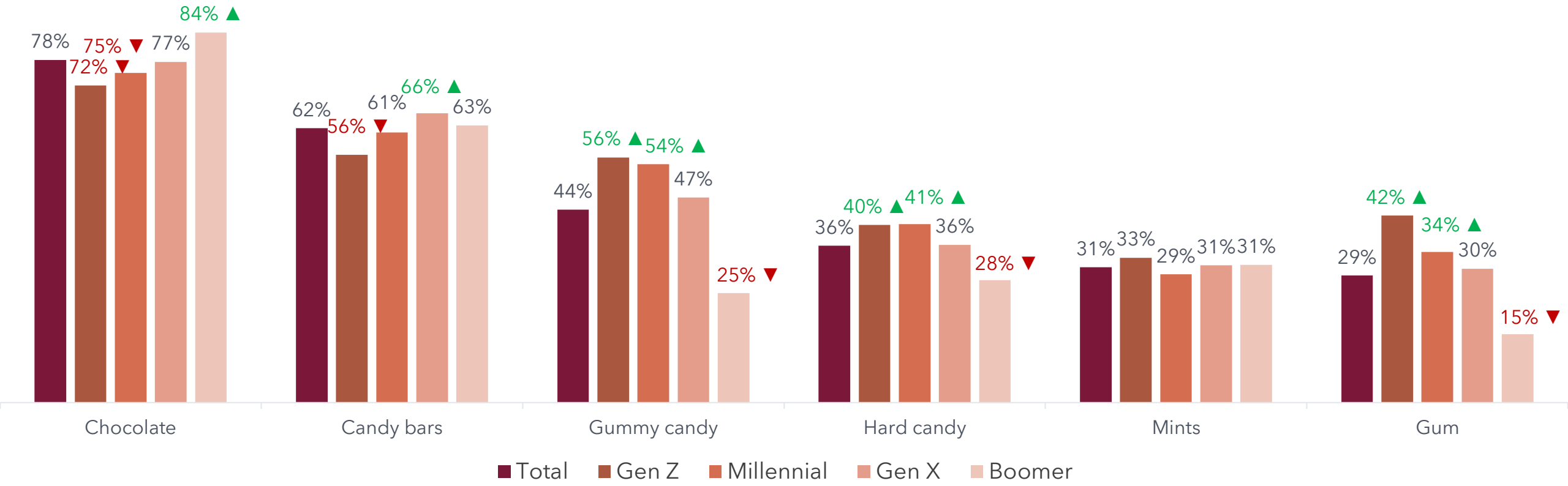
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

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Chocolate Is the Favorite Candy across Generations, but Especially among Boomers

Gummies, Hard Candy, and Gum Are More Popular with Gen Z and Millennials

Which types of chocolate and candy do you enjoy?



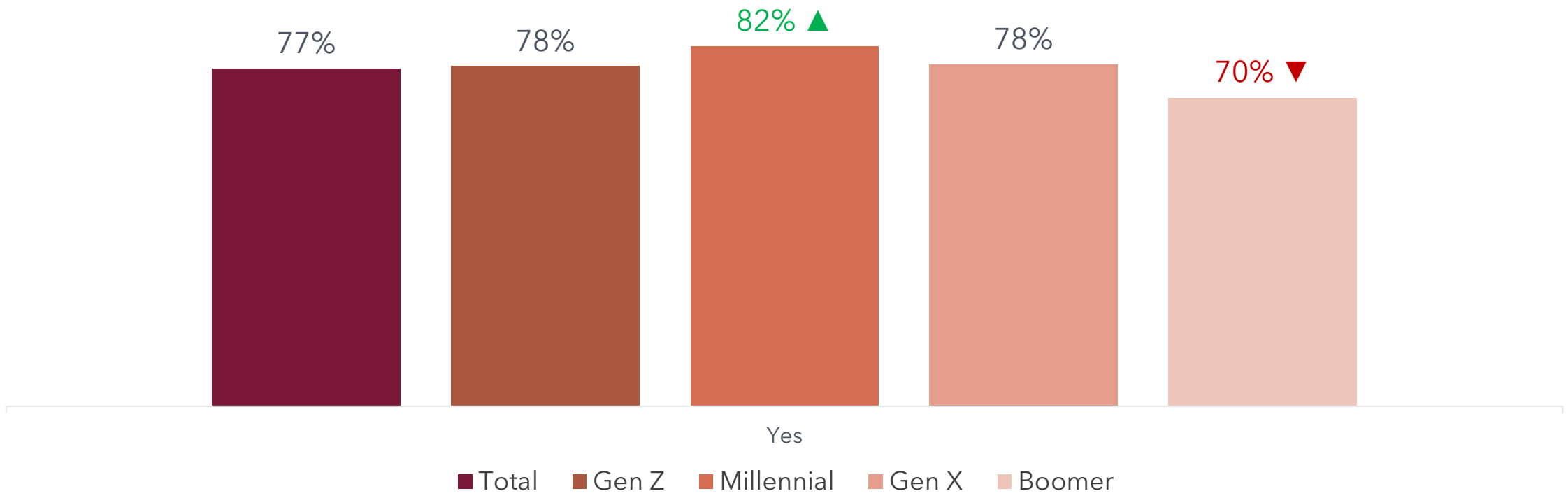
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

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Over Three-Quarters of Americans Eat Packaged Deli Meat, Millennials Most of All

Boomers Are Slightly Less Likely to

Do you eat packaged deli meat?

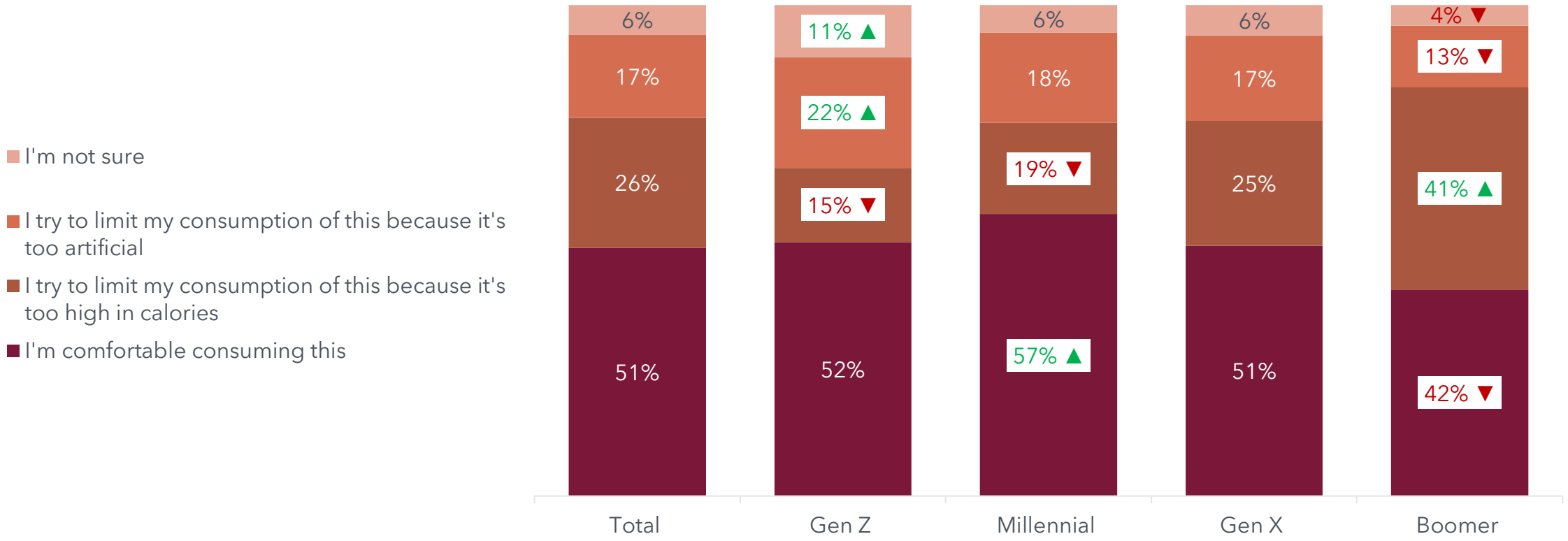


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select, % yes
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Sweeteners: **White Sugar**

How do you feel about the following sweeteners? **White sugar**

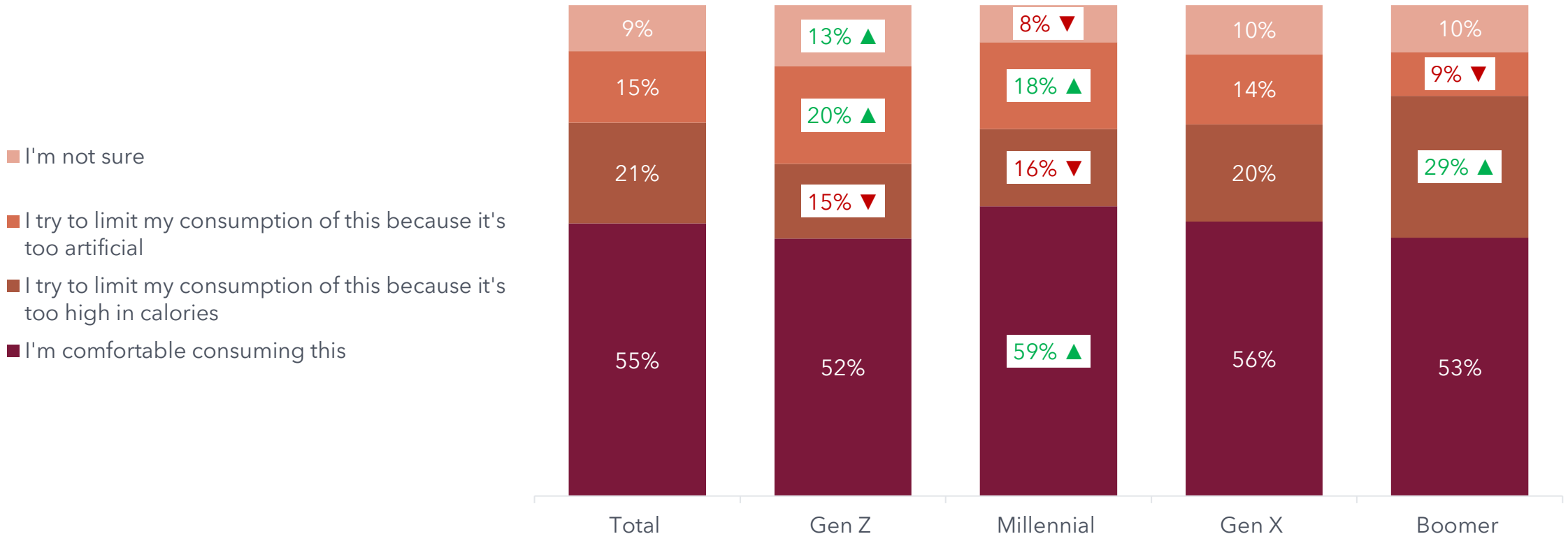


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select grid
Significance test: Confidence level 95%. ▲▼ over/under Total

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Sweeteners: **Brown Sugar**

How do you feel about the following sweeteners? **Brown sugar**

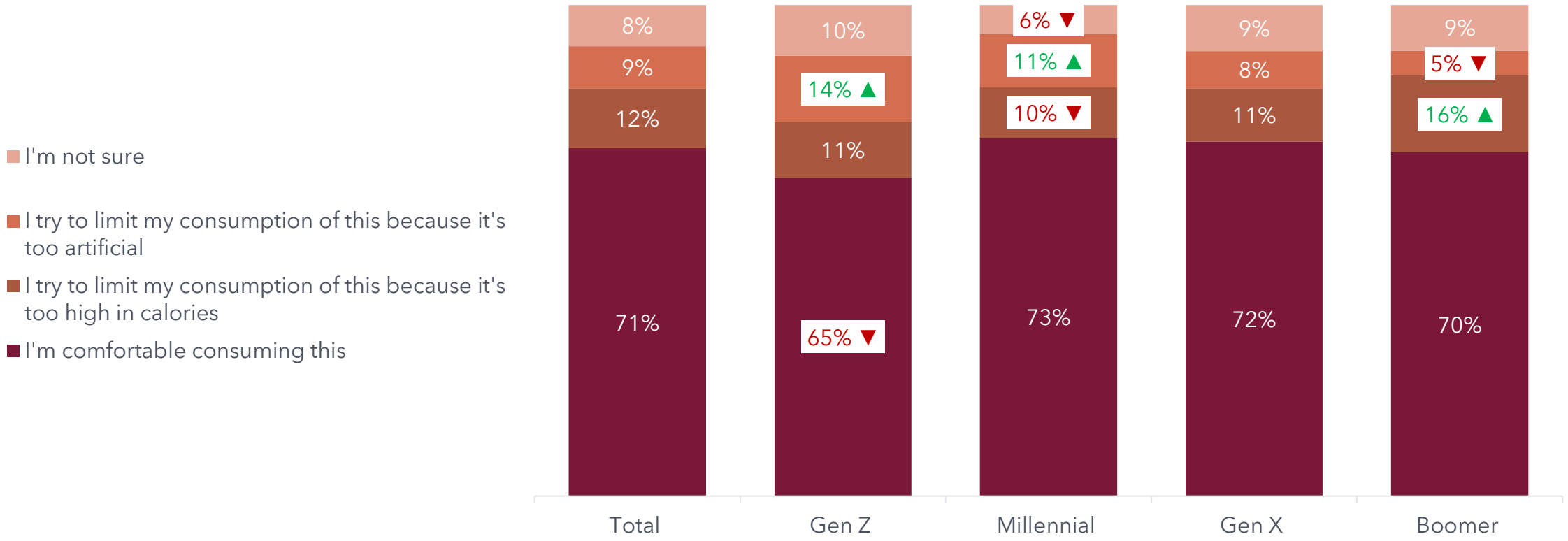


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select grid
Significance test: Confidence level 95%. ▲▼ over/under Total

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Sweeteners: **Honey**

How do you feel about the following sweeteners? **Honey**

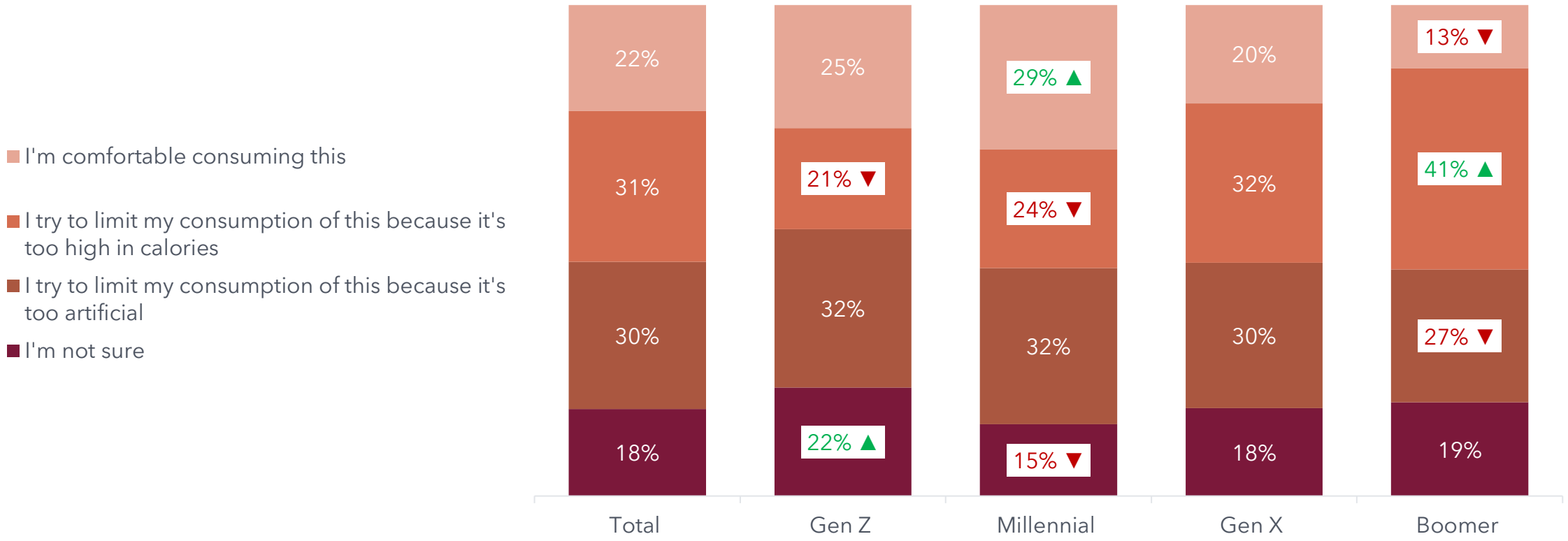


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Single select grid
Significance test: Confidence level 95%. ▲▼ over/under Total

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Sweeteners: **High Fructose Corn Syrup**

How do you feel about the following sweeteners? **High fructose corn syrup**

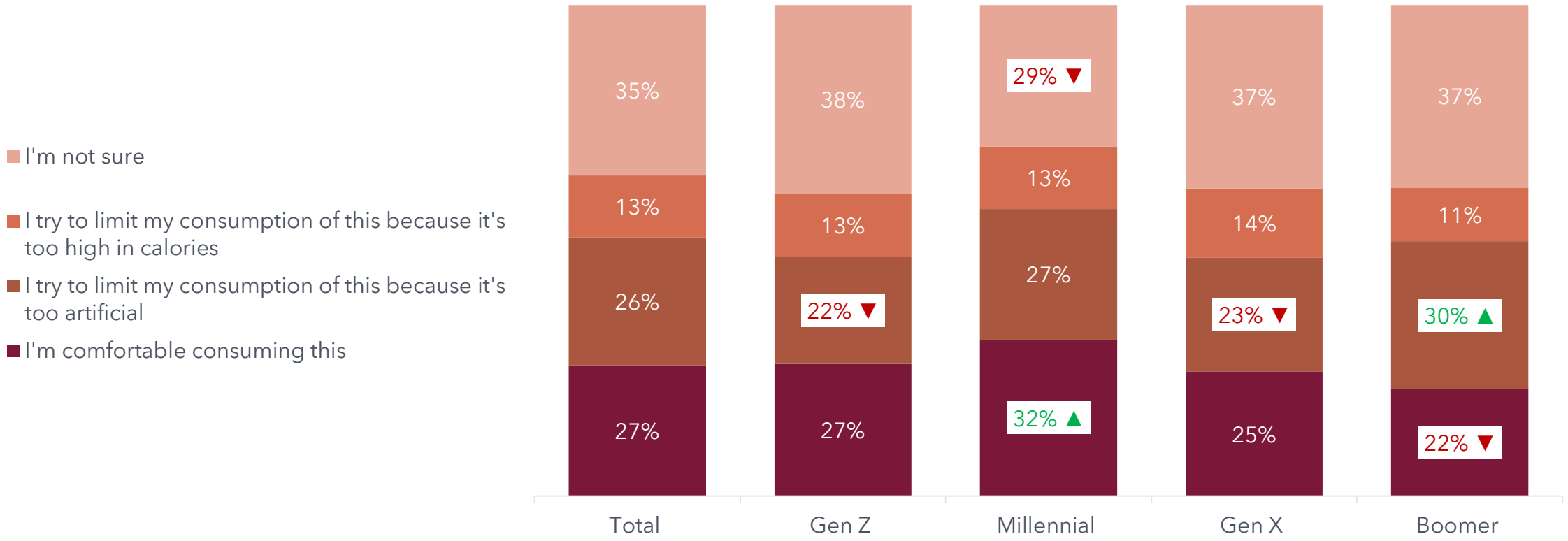


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select grid
Significance test: Confidence level 95%. ▲▼ over/under Total

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Sweeteners: **Stevia**

How do you feel about the following sweeteners? **Stevia**

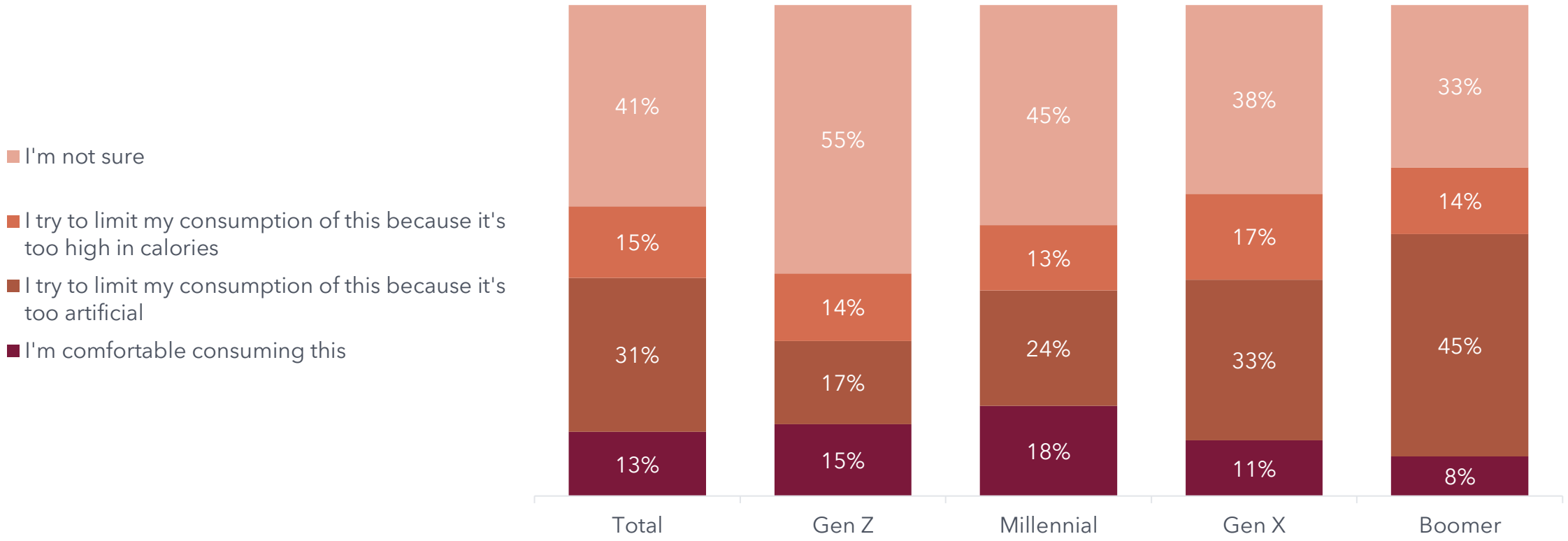


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select grid
Significance test: Confidence level 95%. ▲▼ over/under Total

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Sweeteners: **Saccharin**

How do you feel about the following sweeteners? **Saccharin**

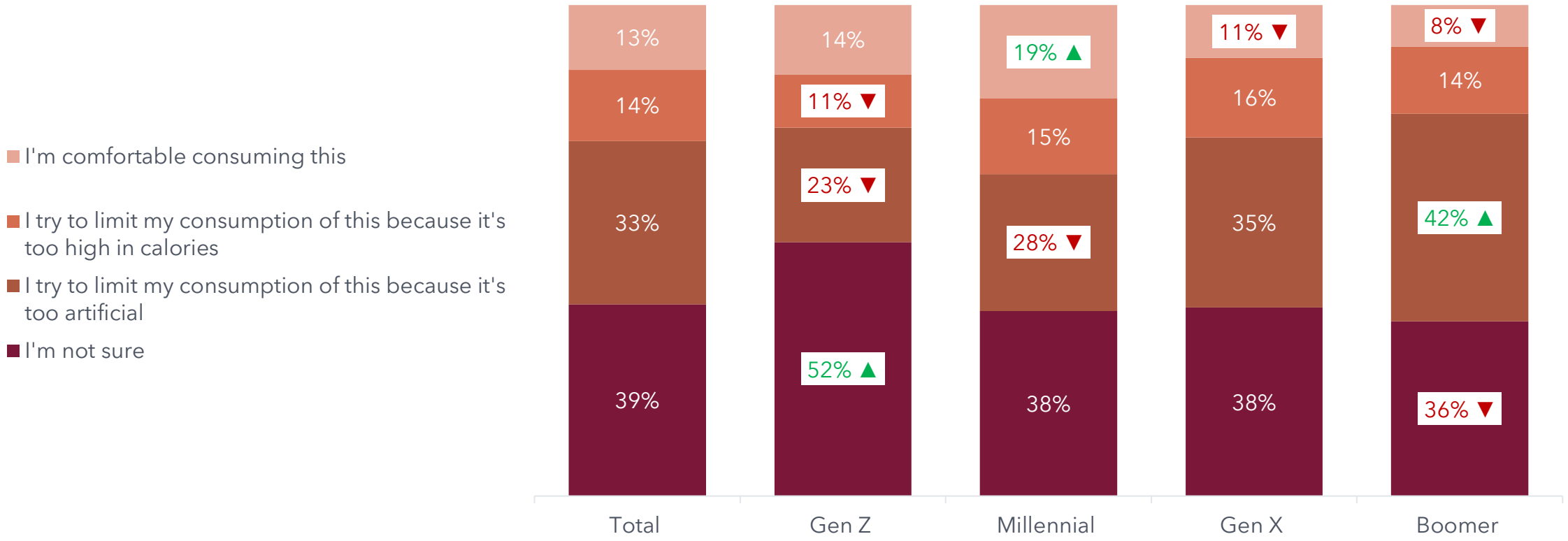


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select grid
Significance test: Confidence level 95%. ▲▼ over/under Total

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Sweeteners: **Aspartame**

How do you feel about the following sweeteners? **Aspartame**

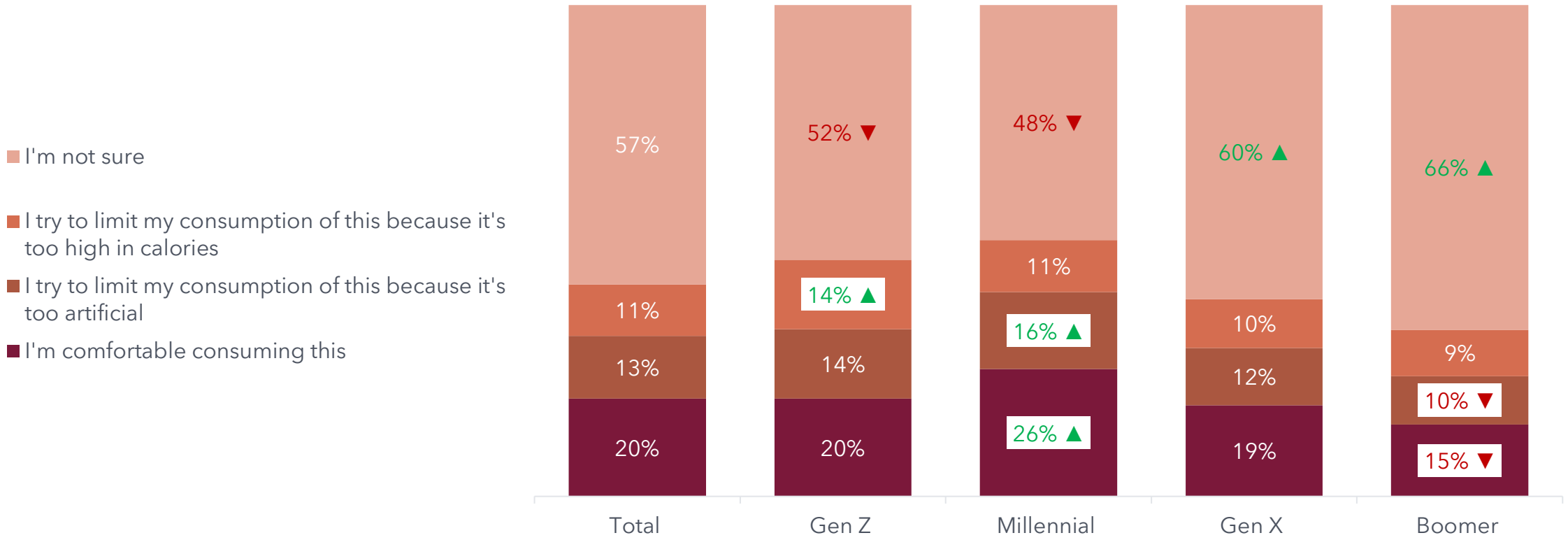


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select grid
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Sweeteners: **Monk Fruit Extract**

How do you feel about the following sweeteners? **Monk fruit extract**

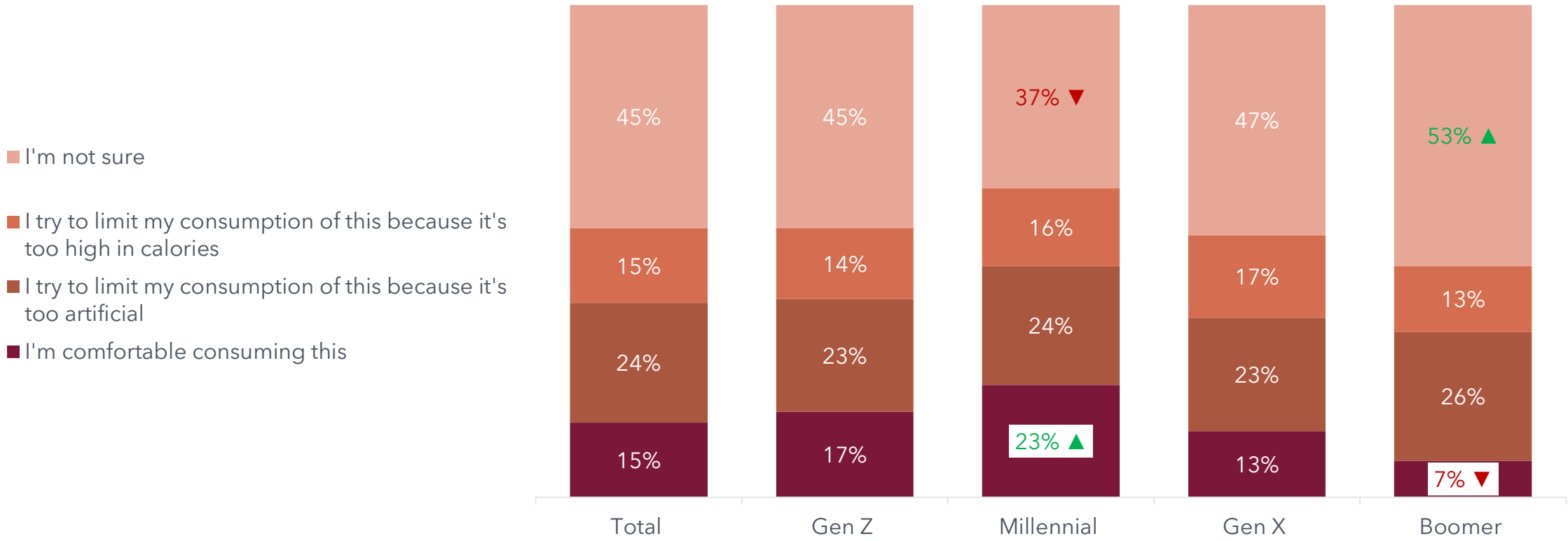


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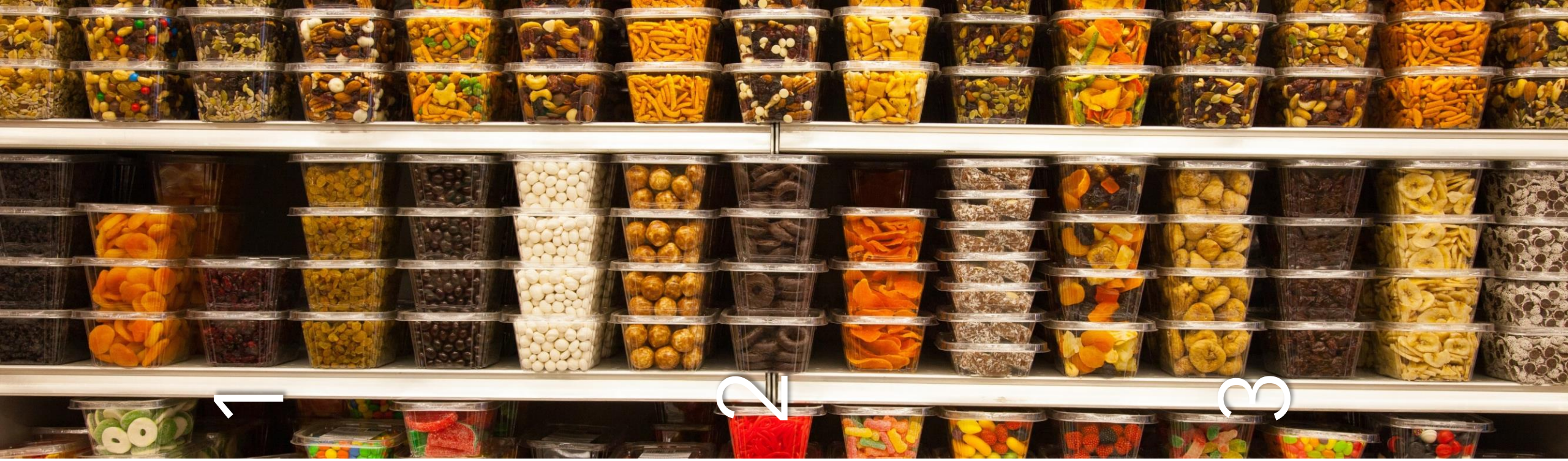
Sweeteners: **Sugar Alcohols**

How do you feel about the following sweeteners? **Sugar alcohols such as sorbitol, xylitol, maltitol**



Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select grid
Significance test: Confidence level 95%. ▲▼ over/under Total

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Consumption

Drivers

Category & Product

Shopping

Information Gathering

Price & Promotion

Location

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Key Takeaways and Action Steps: **Food Drivers**

Know This	Do This
Boomers are the most brand loyal generation when it comes to their groceries, but they can be influenced to try new options that are personally recommended, new flavors, or low-cost trial sizes.	• **Don't give up on wooing brand loyal Boomers**. Instead, consider the 'halo' effect that can come from their Millennial children recommending new options to them, as well as their desire to try new flavors. Further entice this group through sampling and low-cost trials.
Millennials are most likely to sacrifice taste in favor of eating healthier, and specifically seek to increase consumption of protein and all natural items, in addition to more fresh vegetables and fruits.	• **Position healthy eating as additive vs. restrictive for Millennials** by promoting increased consumption of healthy ingredients, such as protein and nature, fresh foods.
Across meals and snacks, Gen Z wants items that are filling and easy to take on the go. As young adults often on the go, being able to fill up quickly and fuel their busy lifestyles is a priority.	• **Adapt to Gen Z's mealtime flexibility.** Understand that Gen Z may be mealtime agnostic when it comes to what they eat, and instead more interested in packing in meals when and where they can. **This means providing them with filling, energy rich options that can be taken on the go.**

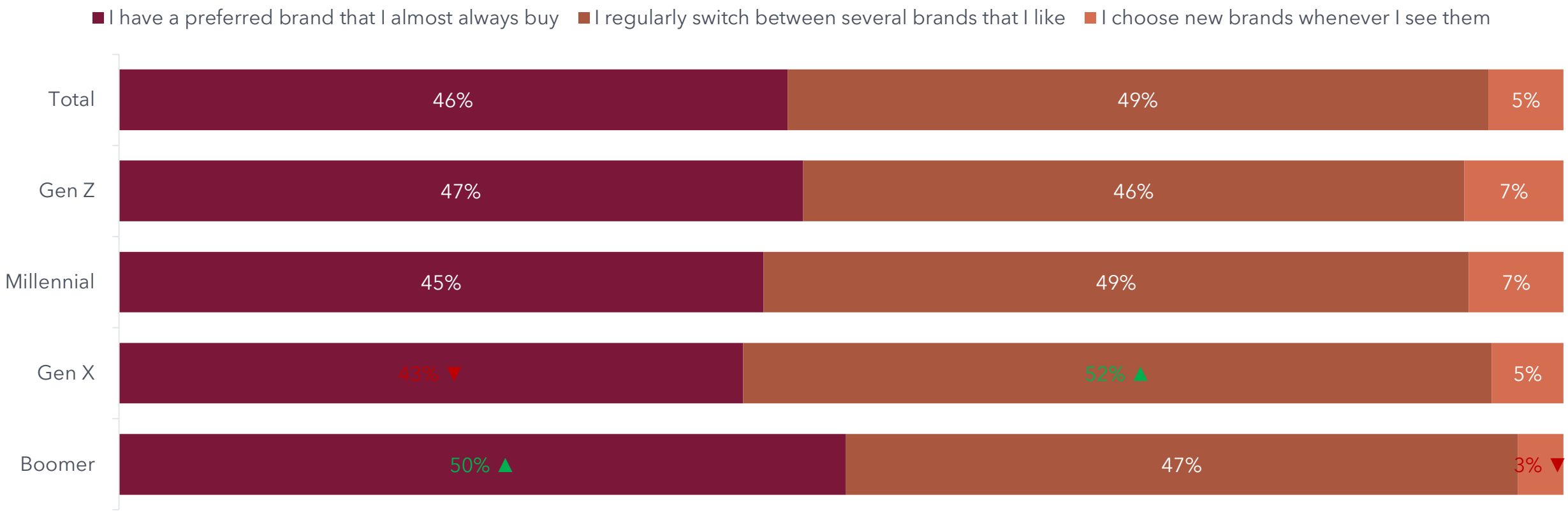
COLLAGE GENERATIONS

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Boomers Are Most Loyal to Their Preferred Grocery Brand while Younger Consumers Rotate between Several Brands They Like

Over Half of Gen X Switches between Brands

Which of the following best describes how you shop for most grocery items?



Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Boomers Try a New Food When It's a Personal Recommendation, New Flavor/Dish, or There's a Trial Size Option

Younger Consumers Are Swayed by Sustainable Packaging or a Luxury Feel

Which of the following could convince you to try a food item you haven't tried before such as a snack, dessert, frozen food, meal ingredient, etc.?

	Total	Gen Z	Millennial	Gen X	Boomer
Recommended by a family member or friend	49%	44%▼	46%▼	46%▼	58%▲
It's a new flavor or dish I haven't tried before	41%	41%	39%	40%	44%▲
Seems healthier than other options	36%	35%	35%	33%	39%▲
Option to buy a small, lower cost trial size	33%	22%▼	30%▼	34%	42%▲
Brand is lower price than others	31%	31%	32%	33%	29%
Seems more convenient than other options	29%	31%	32%	30%	25%▼
Eco-friendly packaging	15%	21%▲	18%▲	12%▼	10%▼
Brand is perceived as premium or luxury	14%	18%▲	18%▲	13%	11%▼
Brand donates a percent of sales to a cause I care about	14%	16%	17%▲	12%	11%▼
Recommended by a celebrity or influencer I like	11%	17%▲	16%▲	10%	5%▼

COLLAGE GENERATIONS

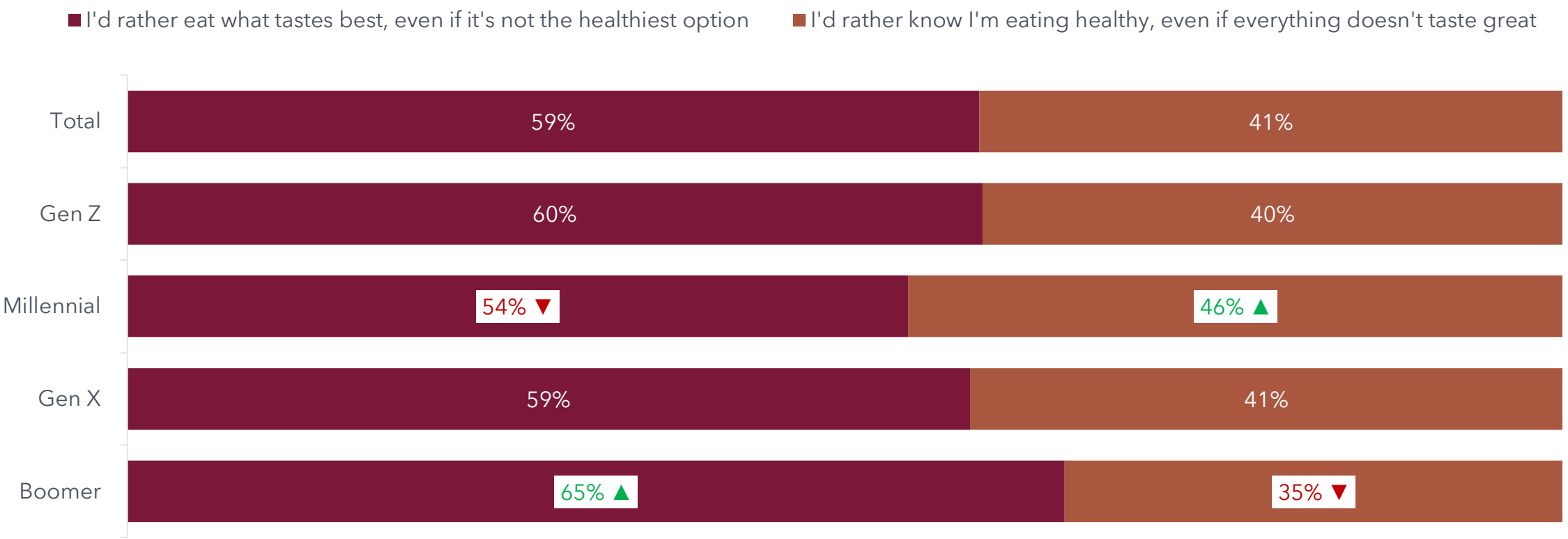
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
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Millennials Are Most Likely to Sacrifice Great Taste for Healthy Eating

But Most Americans across Generations Go for the Tastier Option

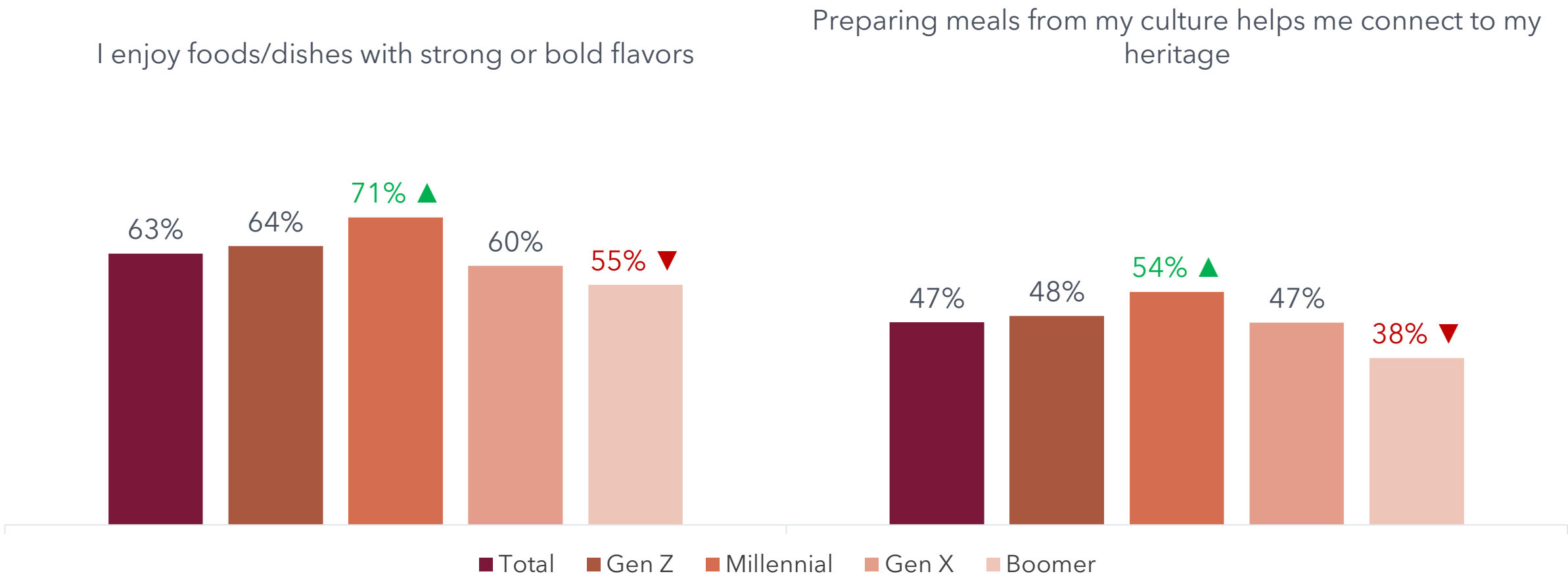
Which of the following statements do you most agree with, even if neither is entirely true?



Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

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Millennials Desire Dishes with Bold Flavors and Enjoy Preparing Meals to Connect with Their Heritage

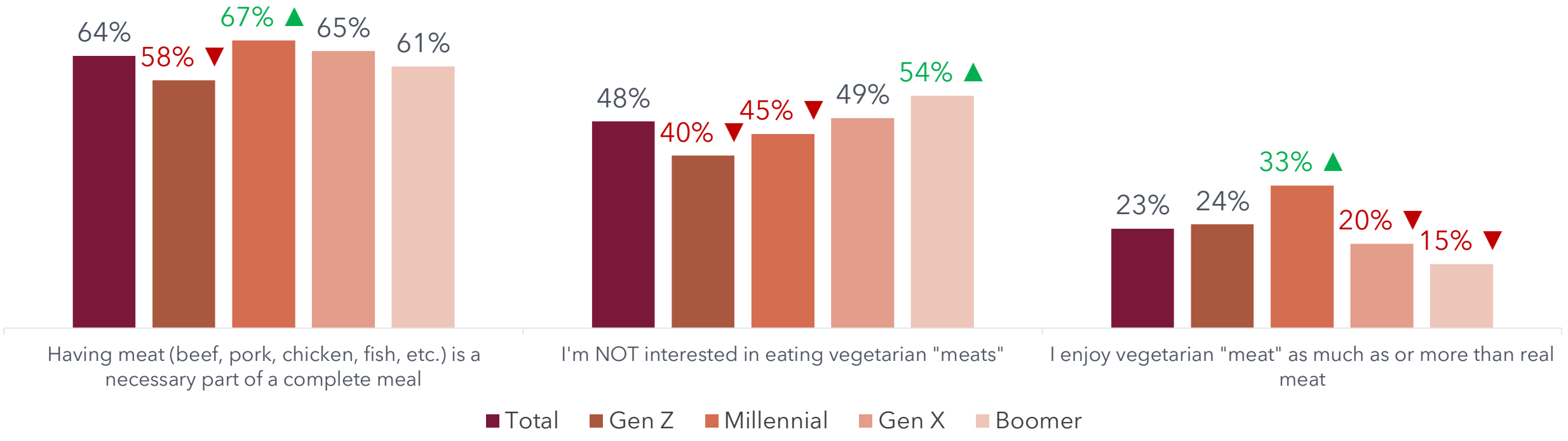


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲▼ over/under Total

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Most Americans See Meat as an Essential Part of a Meal

Millennials are Most Open to Vegetarian "Meat", while Boomers Show the Least Interest



COLLAGE GENERATIONS

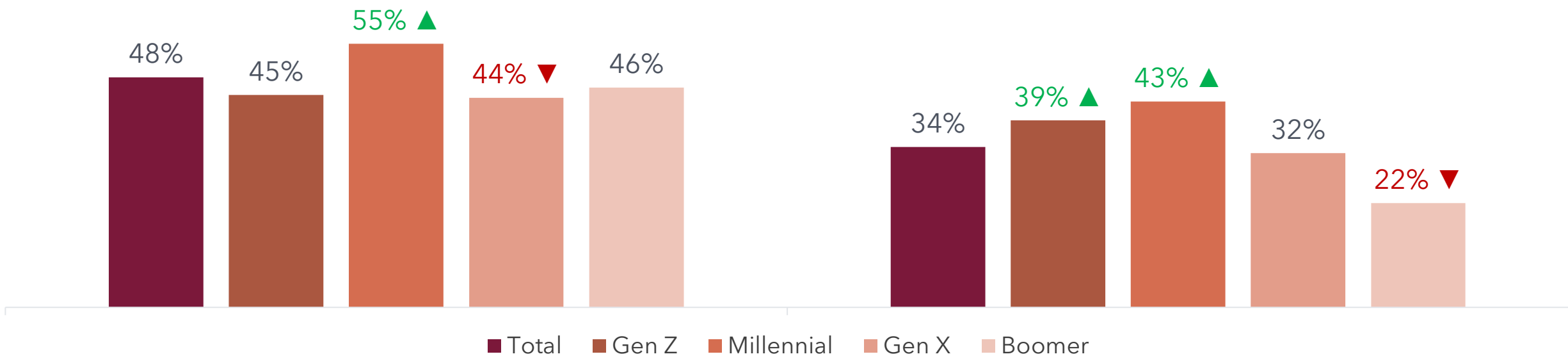
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲▼ over/under Total

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Millennials Are Most Conscious of Their Food Choices and Their Impact

I make an effort to choose responsibly raised meat and seafood

I often think about my food choices' impact on the environment

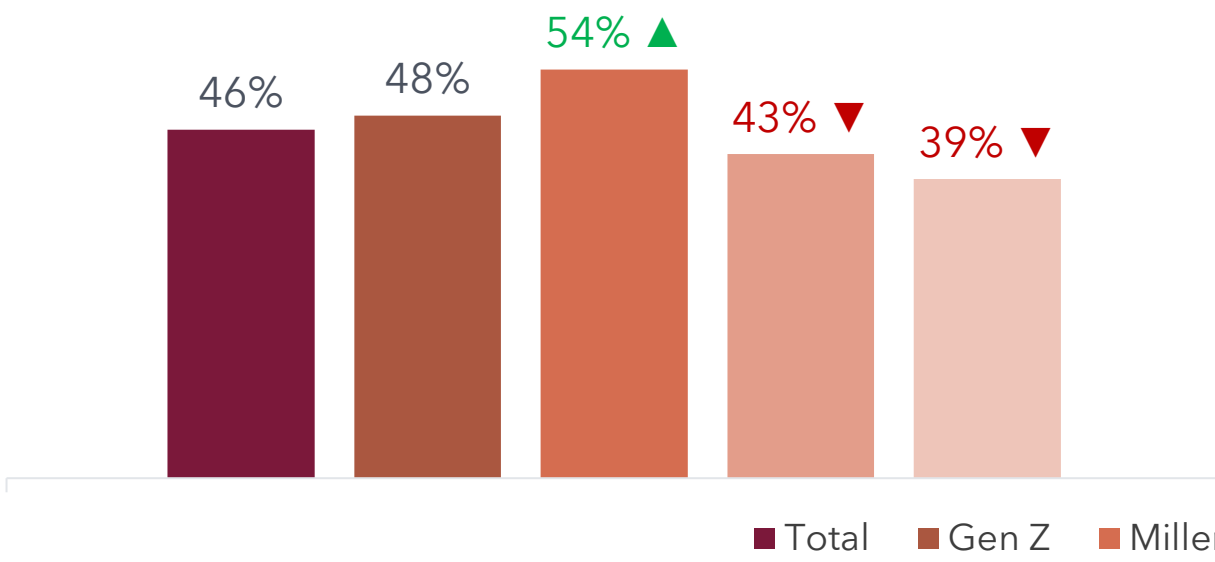


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% agree, strongly agree
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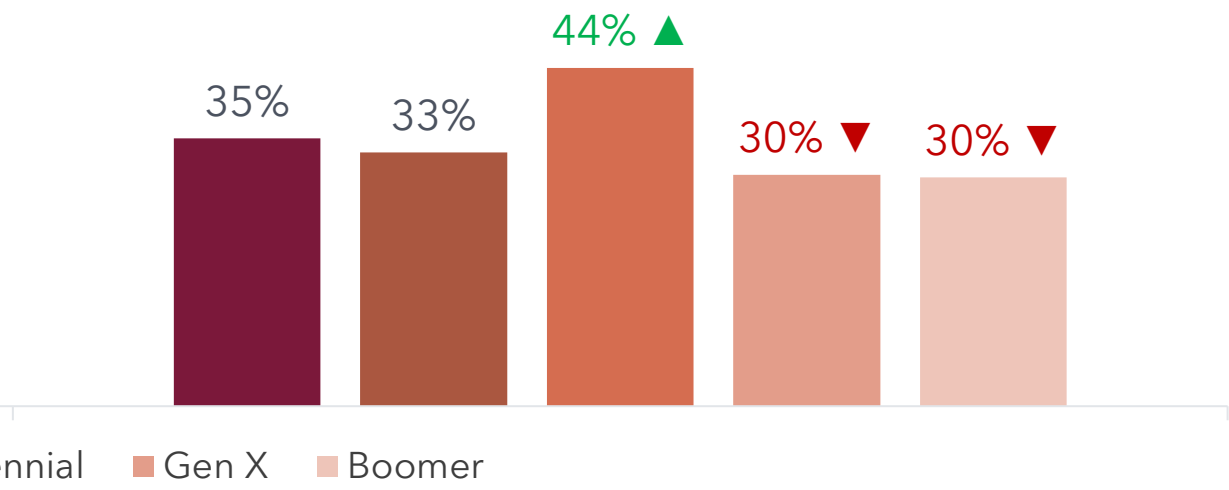
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Younger Consumers Tend to be More Satisfied with Frozen Foods than Older Generations

Frozen meals can be just as good as fresh meals



Frozen meat tastes as good as fresh meat



Total Gen Z Millennial Gen X Boomer

COLLAGE GENERATIONS

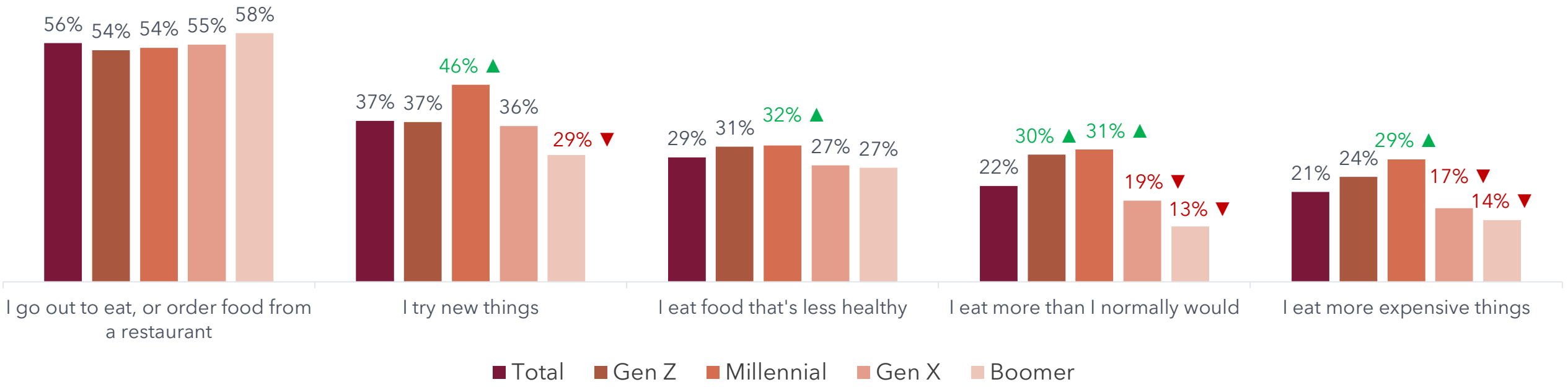
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲▼ over/under Total

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Half of All Americans Go to a Restaurant to Treat Themselves but Millennials also Enjoy Trying New Things and Eating Less Healthy Items

Nearly a Third of Gen Z and Millennials Will "Treat Themselves" by Eating More Food than Usual

How do you "treat yourself" with food?



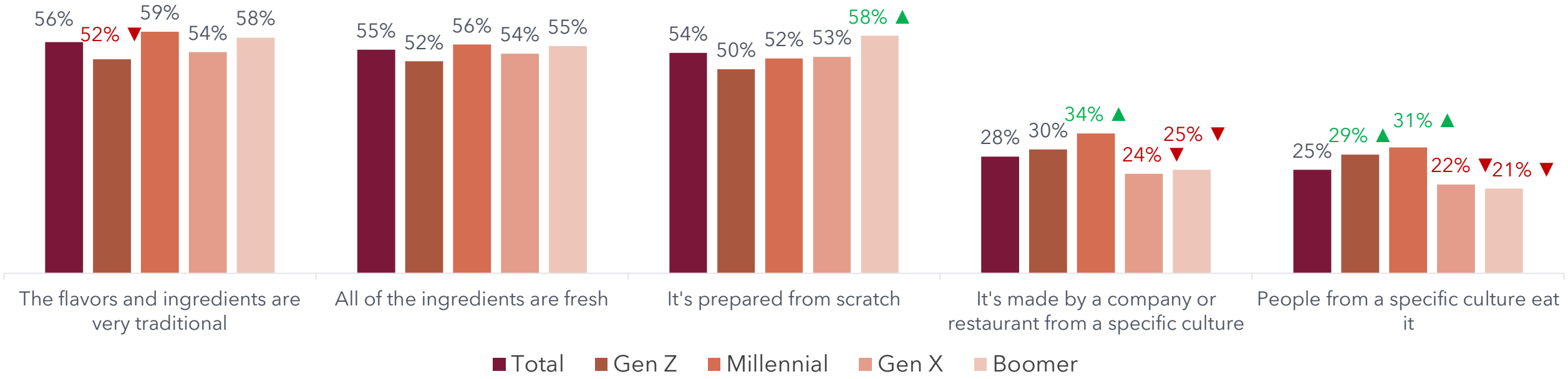
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

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Most Americans Feel Food Is Authentic When It's Prepared from Scratch with Traditional Flavors and Fresh Ingredients

Younger Consumers Associate Authentic Food with Being from a Specific Culture More than Older Gens

What makes food authentic?



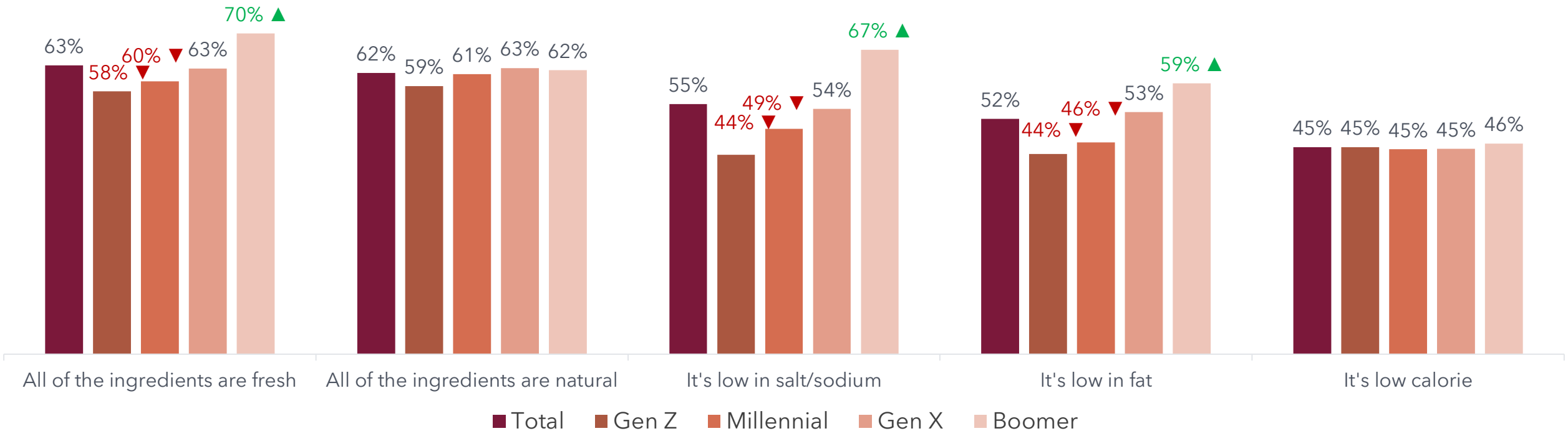
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Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Fresh and Natural Ingredients Are the Most Important Components to Healthy Foods

Boomers Especially View Food Low in Sodium and Fat as Healthy

What makes food healthy?



Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Boomers Are Most Likely to Be Limiting Their Diet in a Variety of Ways, with Half Reducing Their Sugar and Salt Intake

One in Five Millennials Are Limiting How Much Meat They Eat

Are you actively trying to reduce or limit any of the following things from your diet?

	Total	Gen Z	Millennial	Gen X	Boomer
Sugar	47%	42%▼	43%▼	46%	53%▲
Sodium / Salt	37%	27%▼	29%▼	37%	52%▲
Processed foods	37%	30%▼	33%▼	38%	43%▲
Fat	30%	29%	28%▼	29%	35%▲
Artificial sweeteners	30%	25%▼	27%▼	31%	34%▲
Carbohydrates (i.e., carbs)	27%	19%▼	25%	28%	31%▲
Artificial flavors or colors	27%	21%▼	28%	26%	28%
Calories in general	26%	28%	27%	24%	26%
GMO foods (Genetically Modified foods)	24%	19%▼	23%	24%	27%▲
Meat	16%	18%	20%▲	14%▼	13%▼
None of the above	20%	19%	21%	21%	17%▼

COLLAGE GENERATIONS

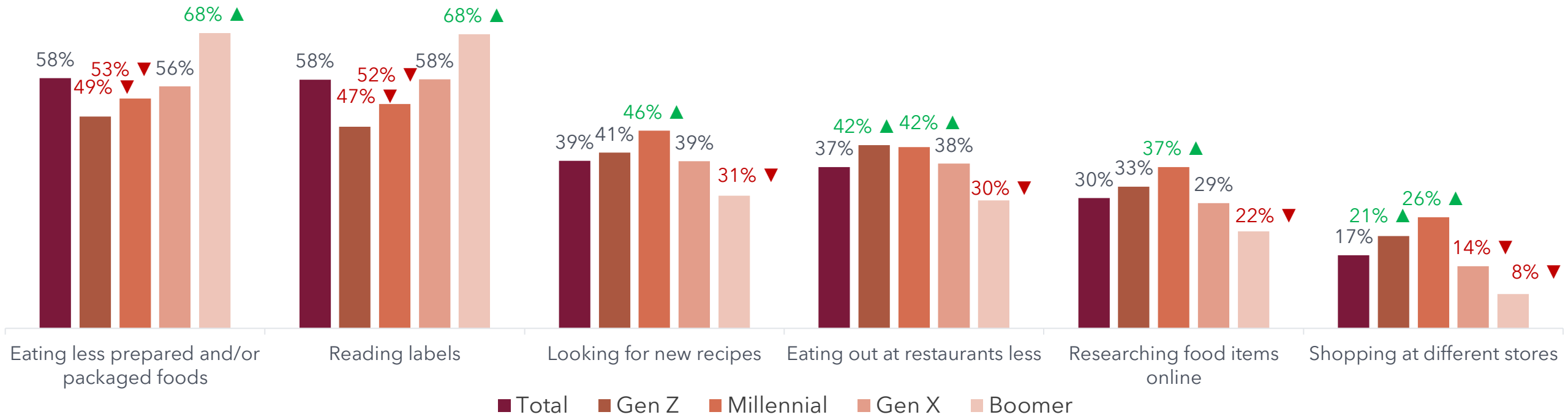
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Multiselect
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Boomers Strive to Reduce Their Consumption of Certain Ingredients by Eating Less Packaged Foods and Reading Labels

Younger Gens Stand out for Looking for New Recipes, Eating out Less, and Shopping Different Places

What are you doing to reduce your consumption of these things?



COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 respondents that are actively trying to reduce or limit things in their diet, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Half of Americans Are Trying to Eat More Fruits and Vegetables, but over a Third of Younger Consumers Are also Prioritizing Protein

Boomers Are Increasing Fiber and Whole Grains in Their Diet

Are you actively trying to increase your consumption of any of the following things in your diet?

	Total	Gen Z	Millennial	Gen X	Boomer
Fresh vegetables and/or fruits	50%	40%▼	45%▼	50%	61%▲
Protein	33%	41%▲	36%▲	33%	27%▼
Nutrients and/or vitamins	24%	27%	28%▲	21%▼	20%▼
All natural items	24%	25%	29%▲	23%	17%▼
Fiber	23%	18%▼	20%▼	23%	29%▲
Whole grains	20%	16%▼	20%	18%	23%▲
None of the above	17%	17%	15%	18%	19%
Organic items	14%	19%▲	17%▲	13%	11%▼
Probiotics	12%	12%	16%▲	13%	9%▼

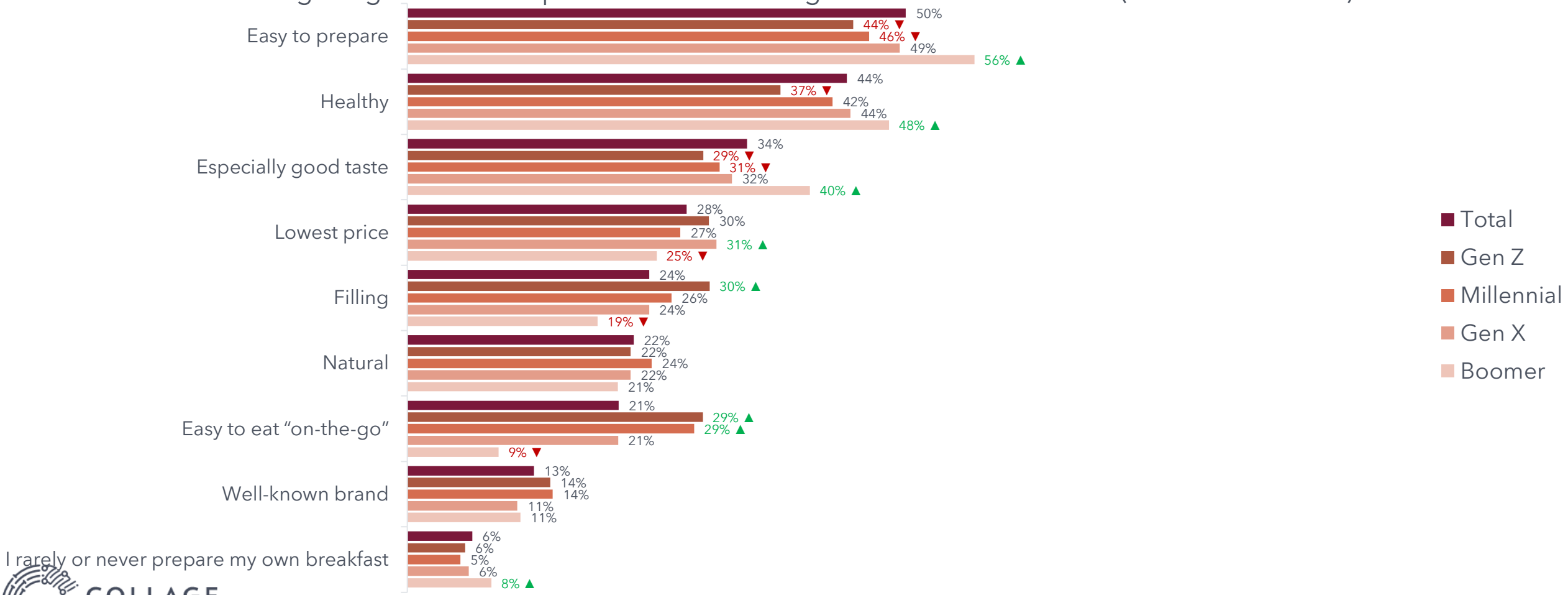
COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect, max. 3
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Choice Considerations: **Breakfast**

Which of the following things are most important when choosing food items for breakfast (not at a restaurant)?

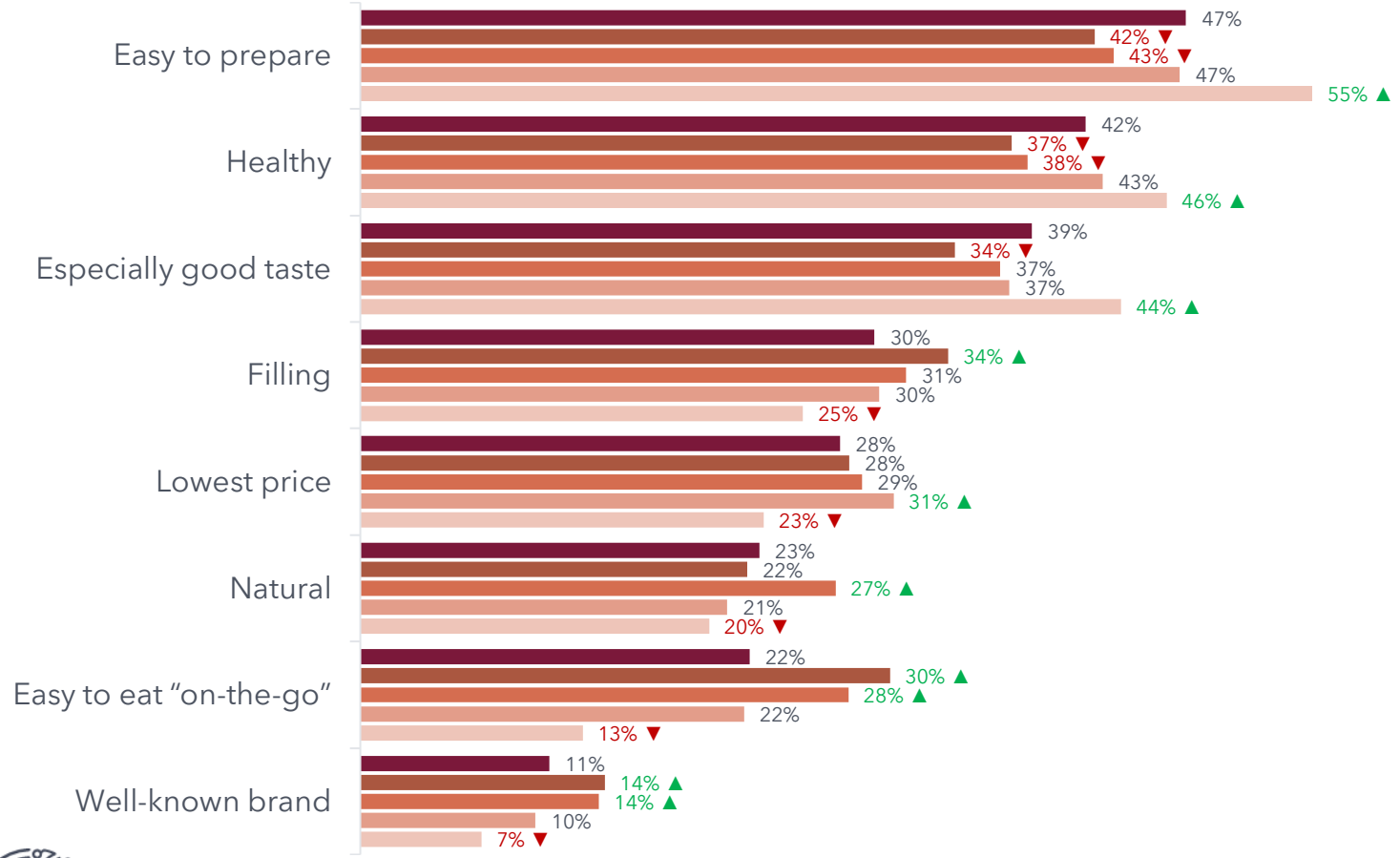


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect, max. 3
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Choice Considerations: **Lunch**

Which of the following things are most important when choosing food items for lunch (not at a restaurant)?

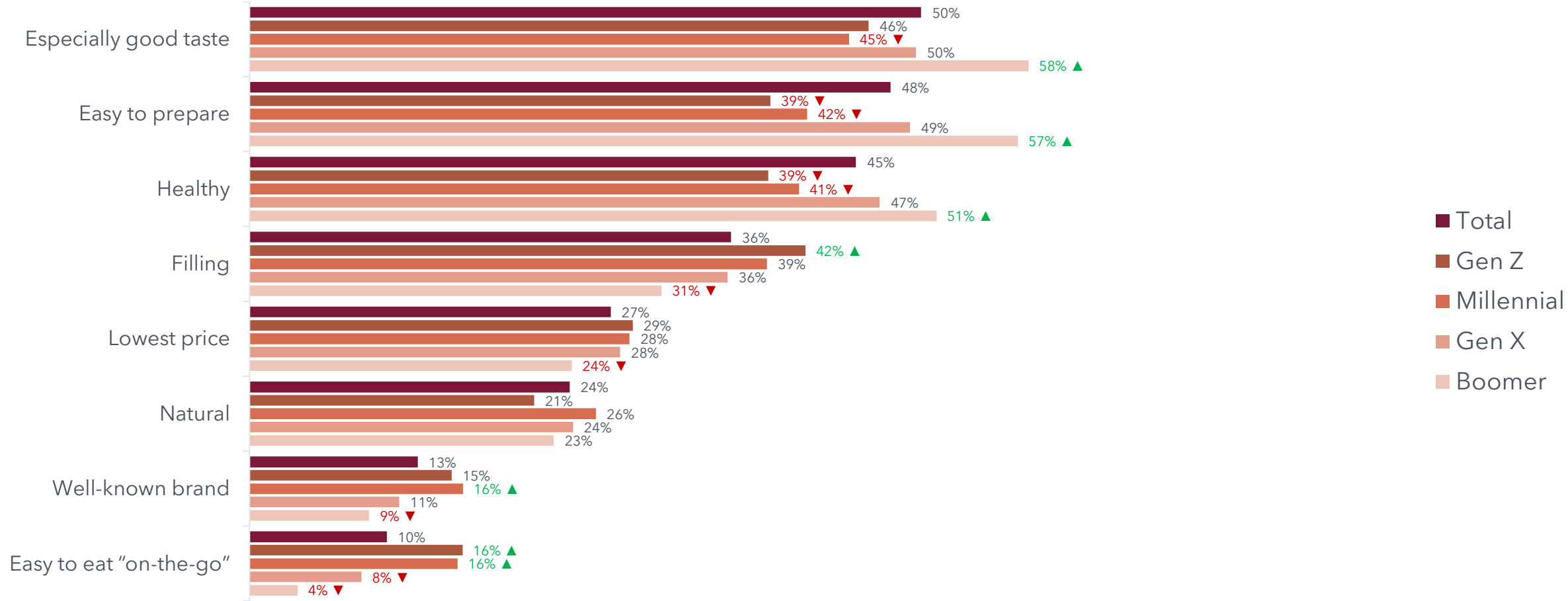


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect, max. 3
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Choice Considerations: **Dinner**

Which of the following things are most important when choosing food items for dinner (not at a restaurant)?



COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect, max. 3
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Half of Americans Snack When They're Hungry Between Meals

Gen Z and Millennials Snack for a Variety of Reasons, Like to Soothe Anxiety or to Replace a Full Meal

Why do you usually snack?

	Total	Gen Z	Millennial	Gen X	Boomer
I get hungry in between meals	51%	53%	51%	52%	49%
To treat / reward myself	37%	33%	37%	36%	38%
Out of boredom	30%	34%	30%	31%	27%▼
I prefer to eat small amounts of food throughout the day	24%	24%	27%▲	22%	23%
I'm feeling anxious	19%	25%▲	23%▲	17%	13%▼
As a replacement for a full meal	18%	22%▲	22%▲	17%	14%▼
To make sure I get enough nutrients/vitamins	17%	17%	23%▲	15%	11%▼
To fuel or recover from a workout	16%	22%▲	21%▲	14%	8%▼

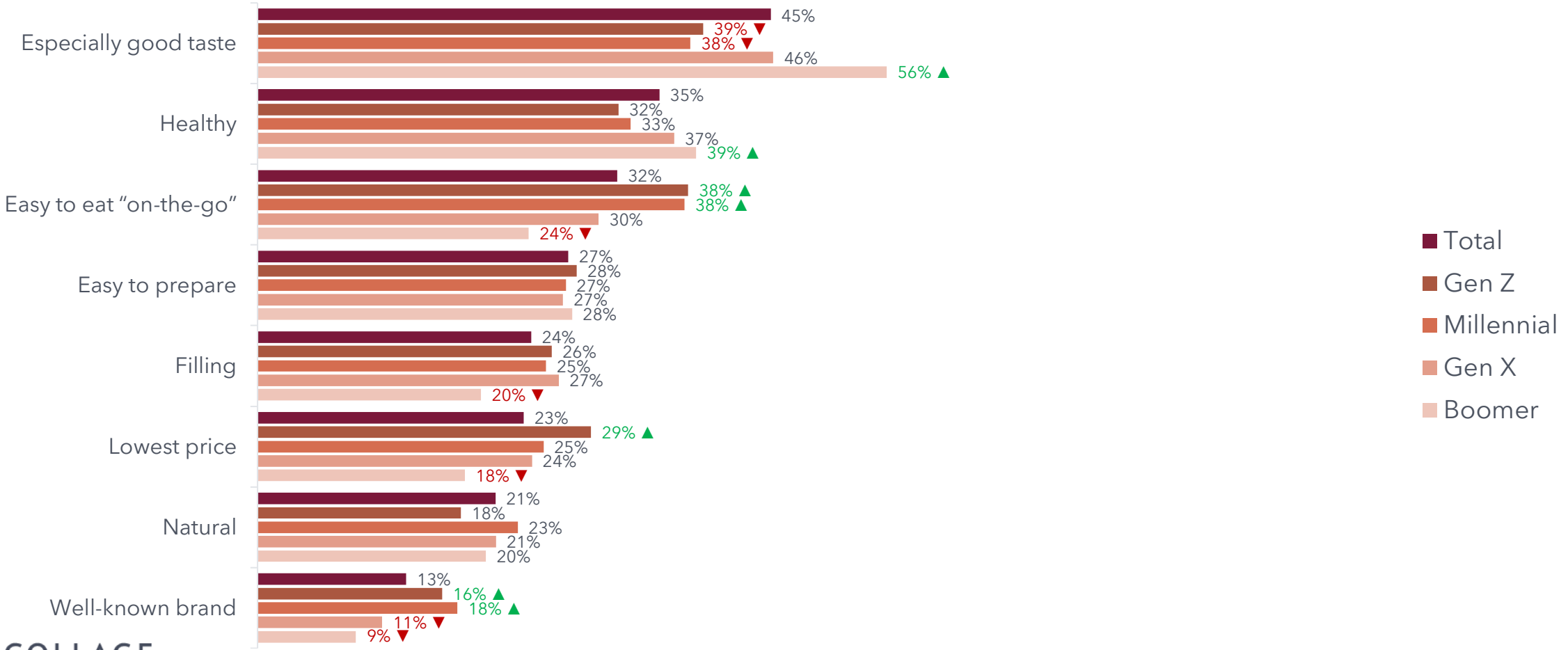
COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Choice Considerations: **Snack**

Which of the following things are most important when choosing a snack?

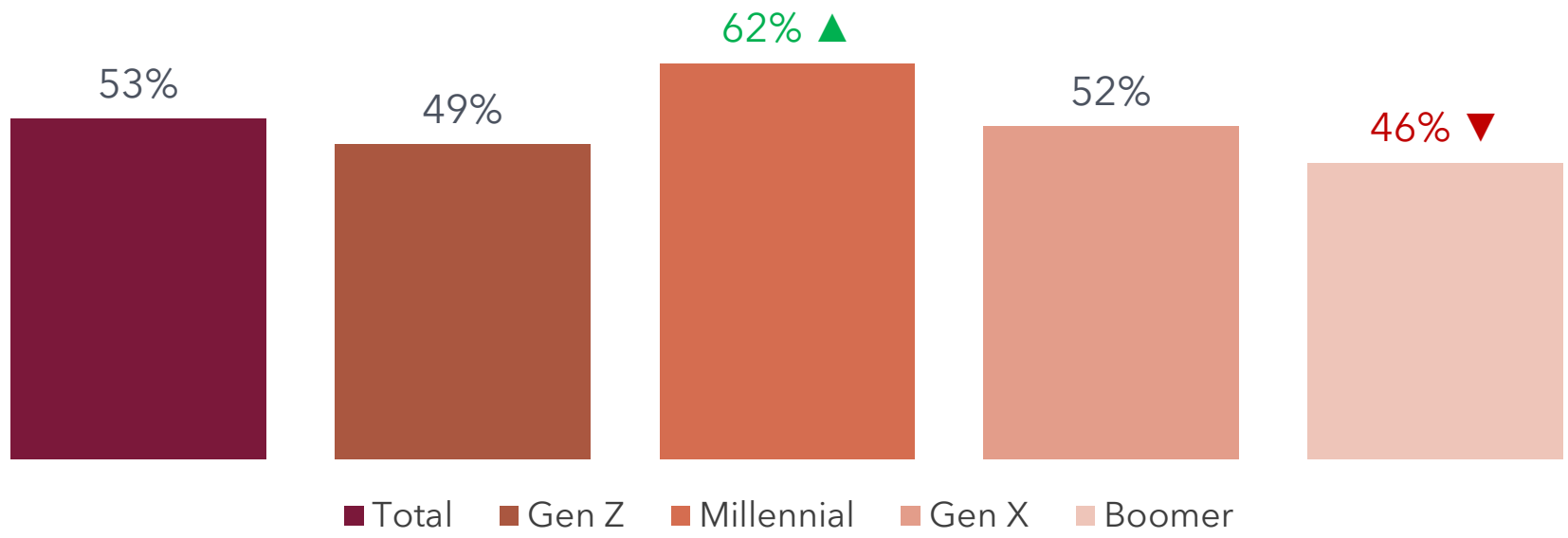


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect, max. 3
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

About Half of All Americans Prefer Individually Packaged Snacks, Especially Millennials

I prefer individually packaged snacks

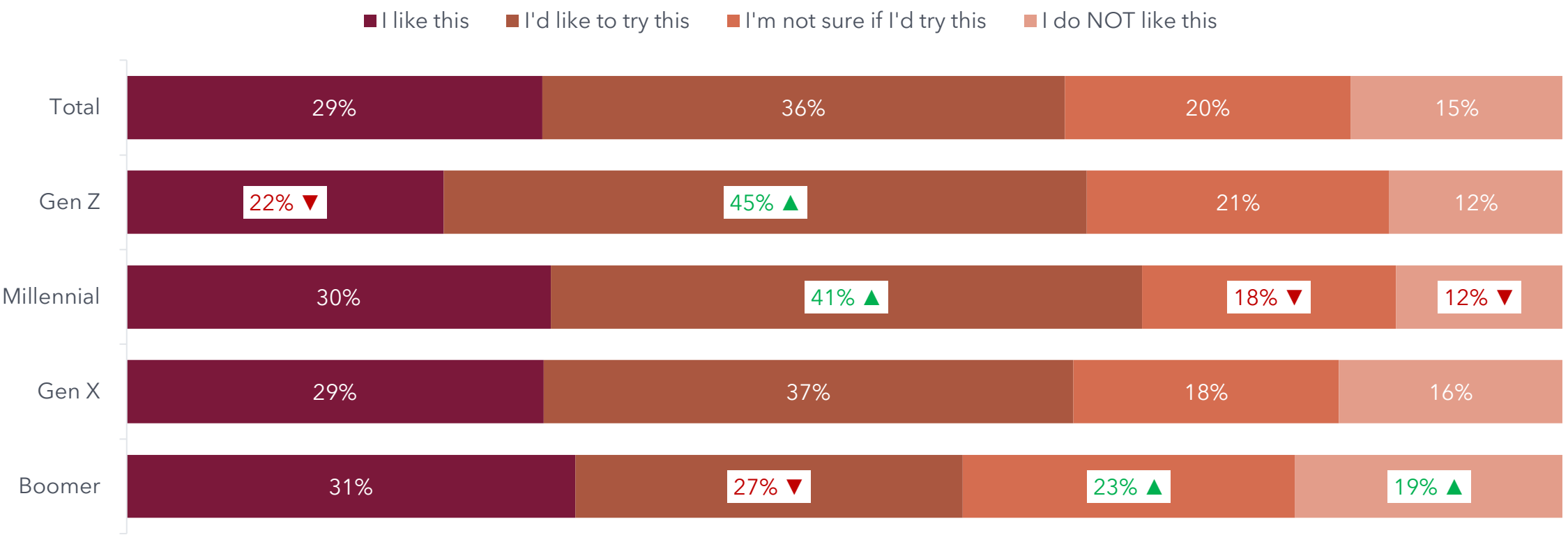


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Caribbean**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Caribbean



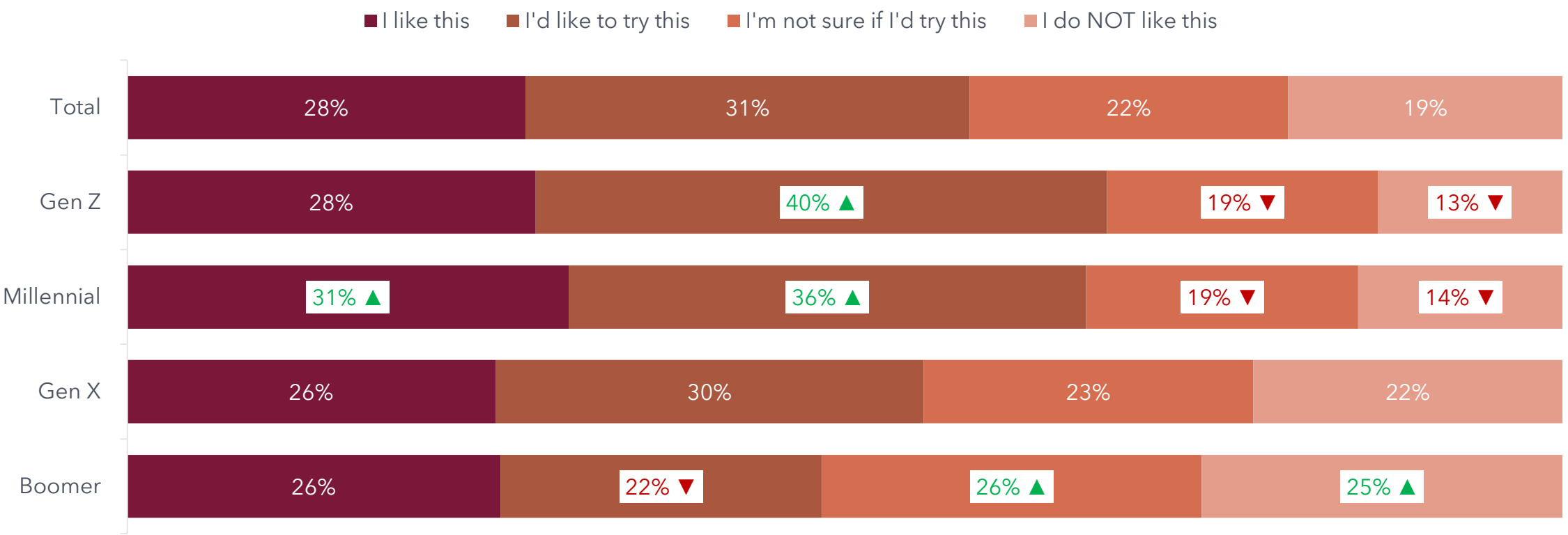
COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Korean**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Korean

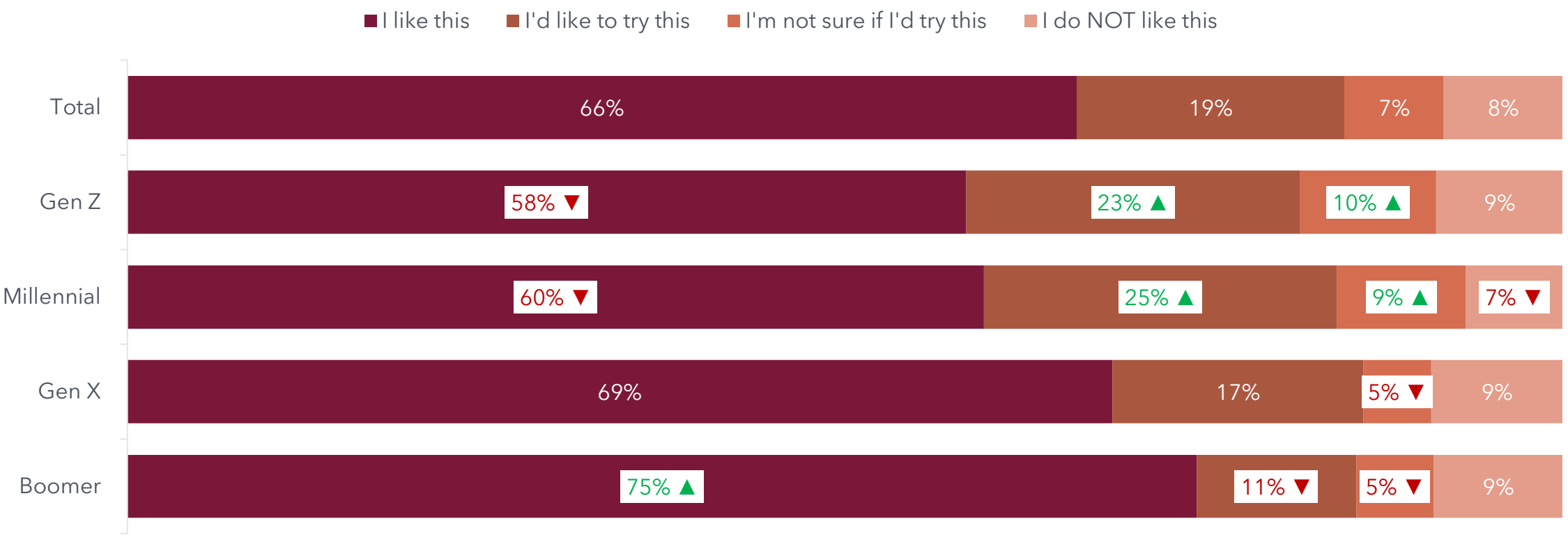


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Chinese**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Chinese

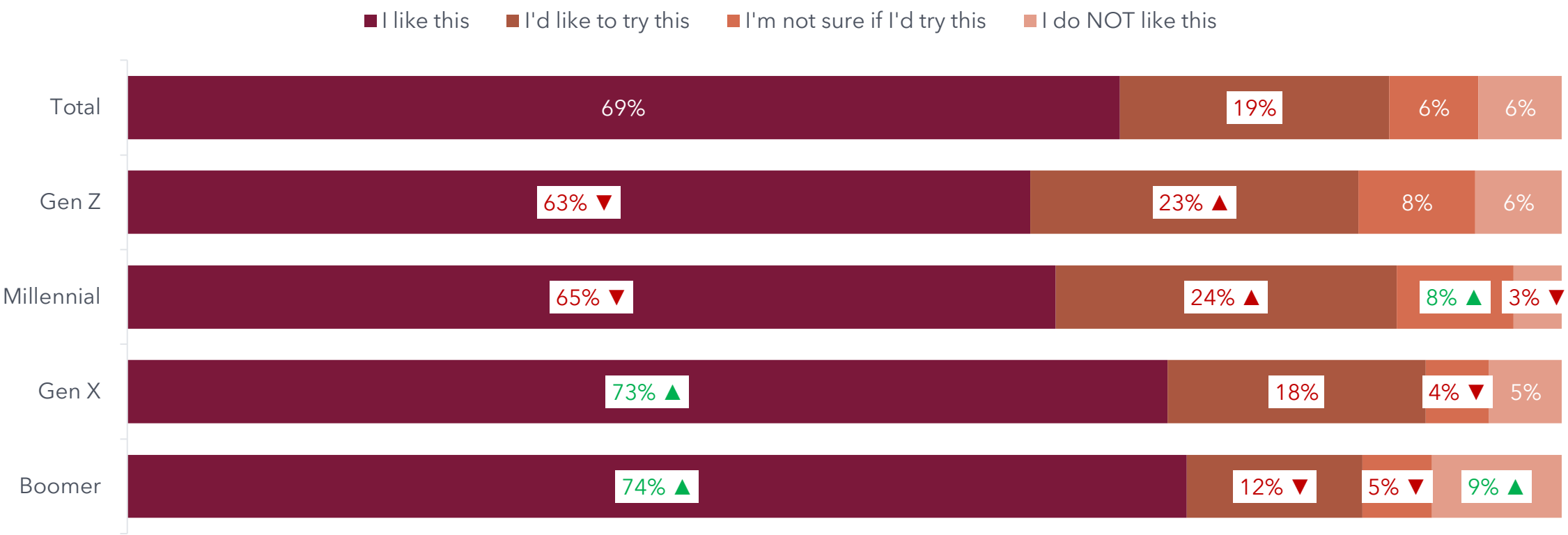


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Mexican**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Mexican

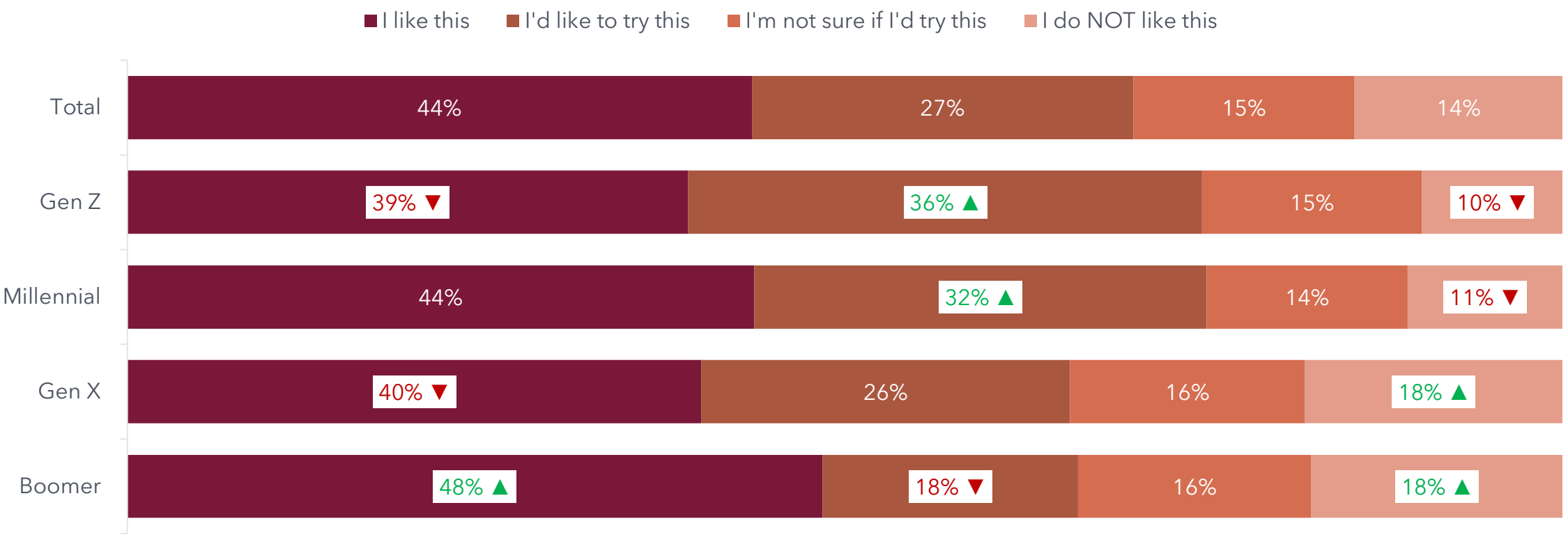


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Japanese**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Japanese



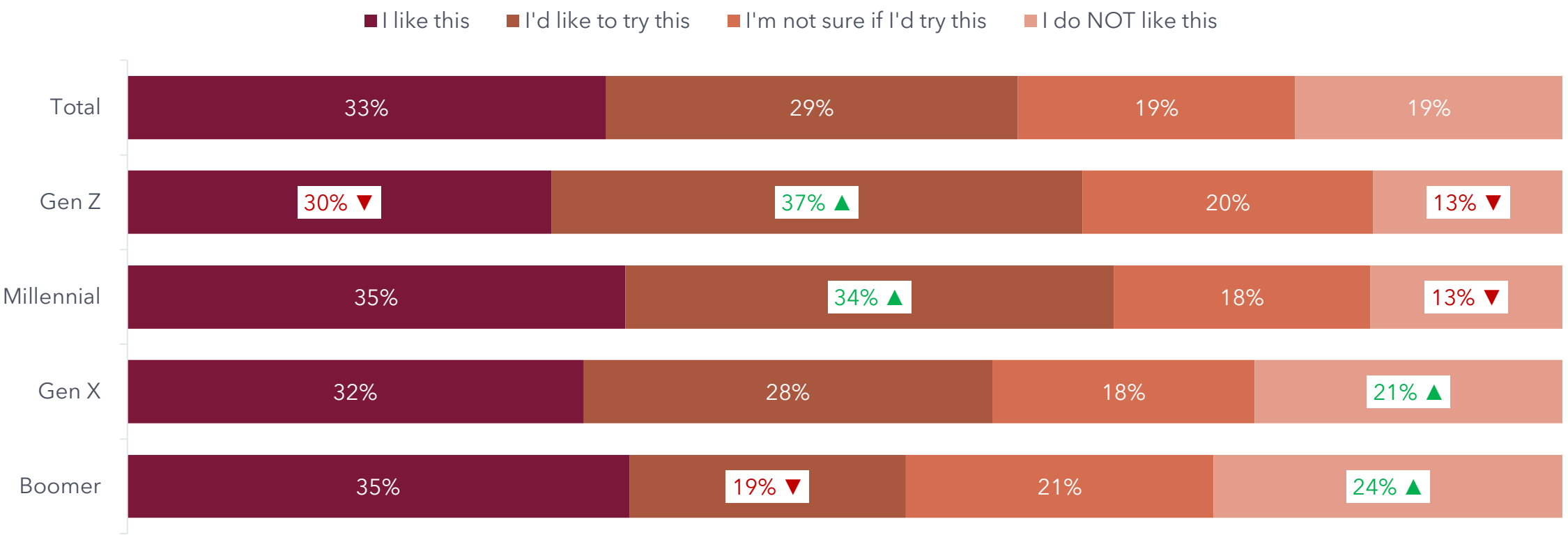
COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Thai**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Thai



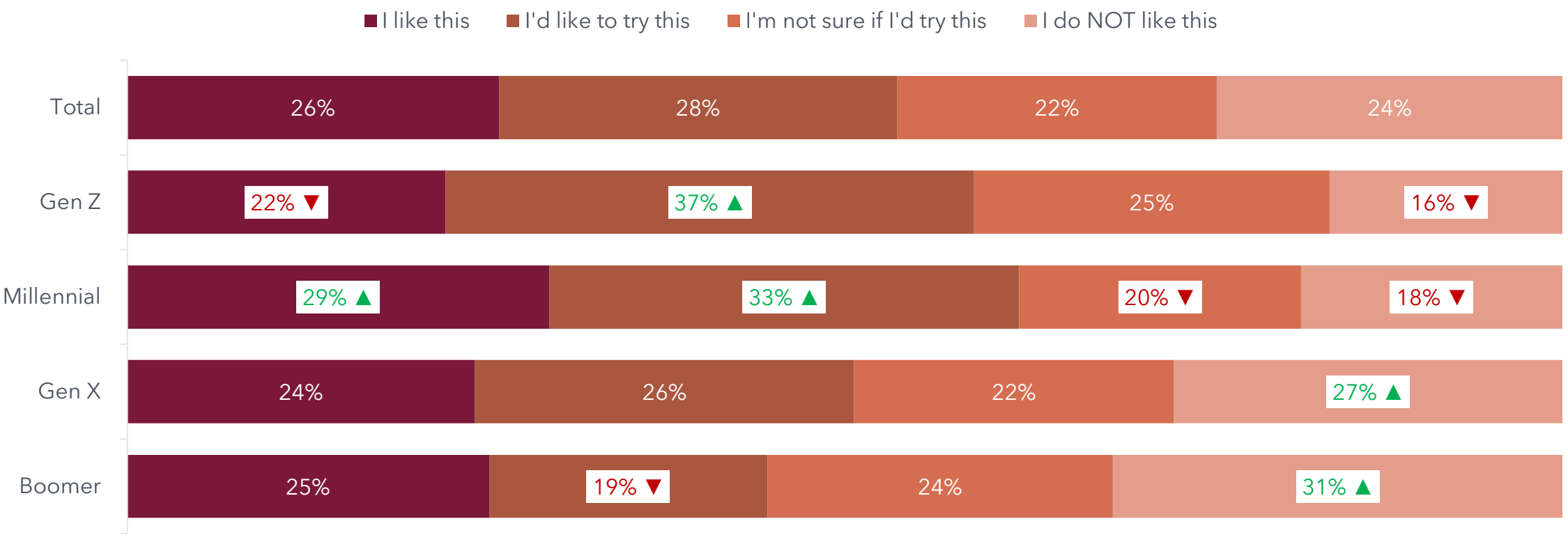
COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Indian**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Indian

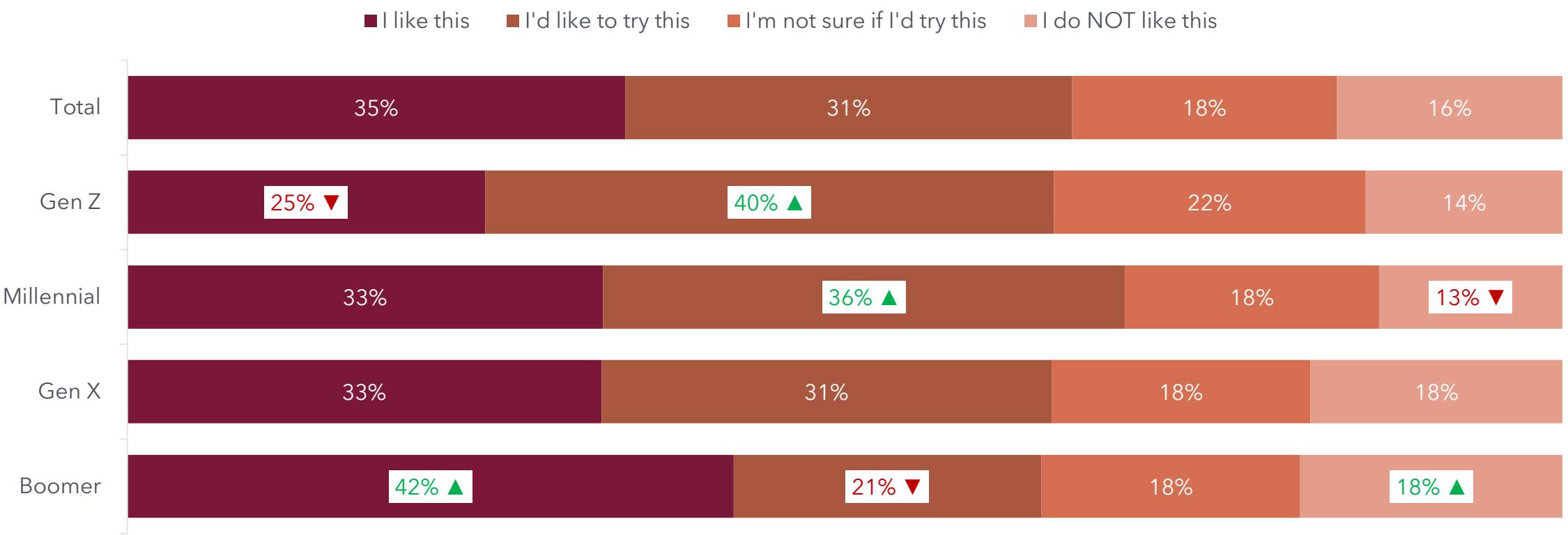


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Greek**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Greek

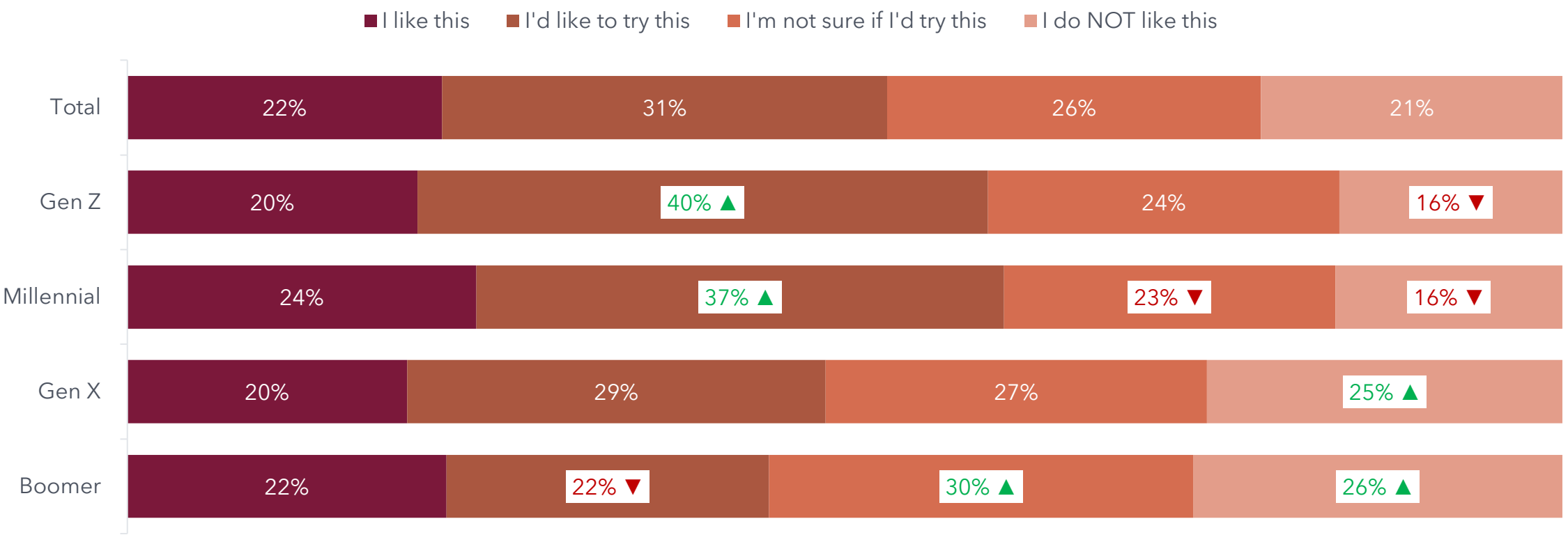


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Vietnamese**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Vietnamese

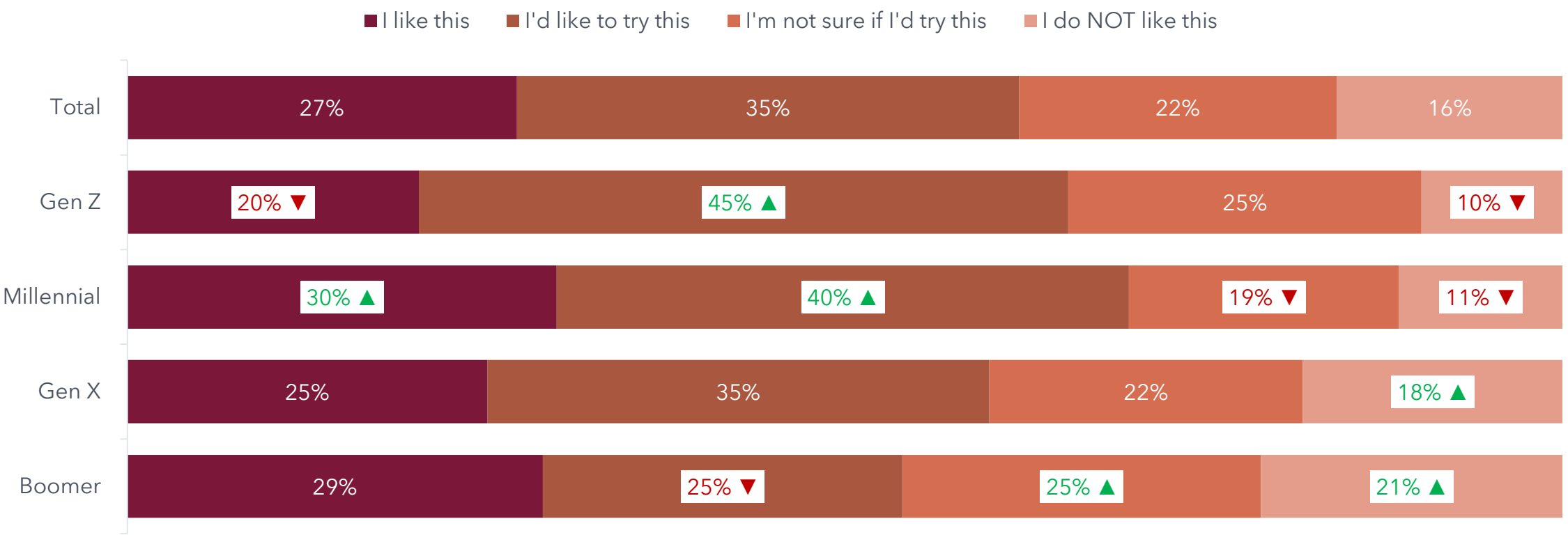


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Cuban**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Cuban

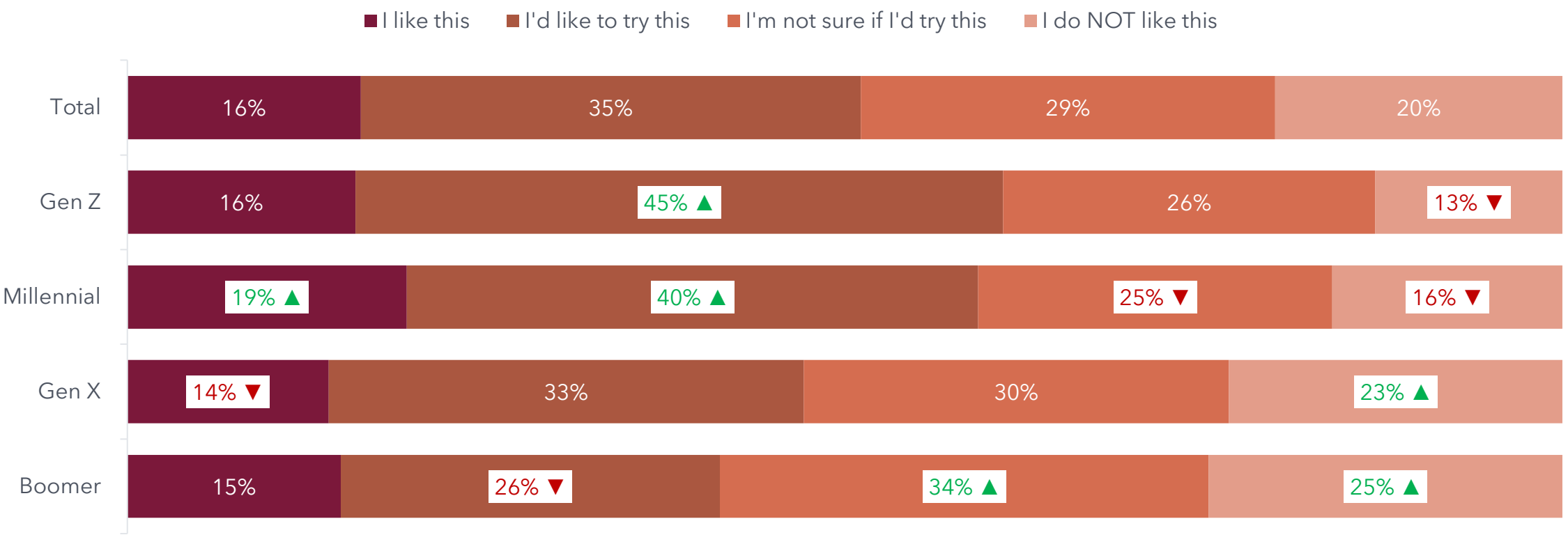


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Types of Cuisine: **Filipino**

Which of the following types of flavors and/or cuisines are you interested in, either when eating at home or at a restaurant?
Filipino



Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Most Americans Eat Chocolate or Candy to Treat Themselves and When Watching TV or Movies at Home

Gen Z and Millennials Especially Indulge at the Movie Theater or When Bored

When do you usually eat chocolate or candy?

	Total	Gen Z	Millennial	Gen X	Boomer
When I want to treat myself	61%	58%	58%▼	61%	66%▲
When watching TV shows or movies at home	45%	43%	47%	47%	41%▼
Halloween	36%	38%	37%	38%	32%▼
Winter holidays (Christmas, Hanukkah, Kwanza, Lunar New Year, etc.)	32%	28%	29%▼	32%	37%▲
Valentine's Day	32%	35%	33%	31%	29%
When watching a movie at a theater	29%	38%▲	35%▲	29%	18%▼
Easter	28%	28%	28%	29%	29%
When I'm bored	28%	33%▲	35%▲	27%	18%▼
When I'm driving/riding in the car	19%	20%	25%▲	20%	12%▼

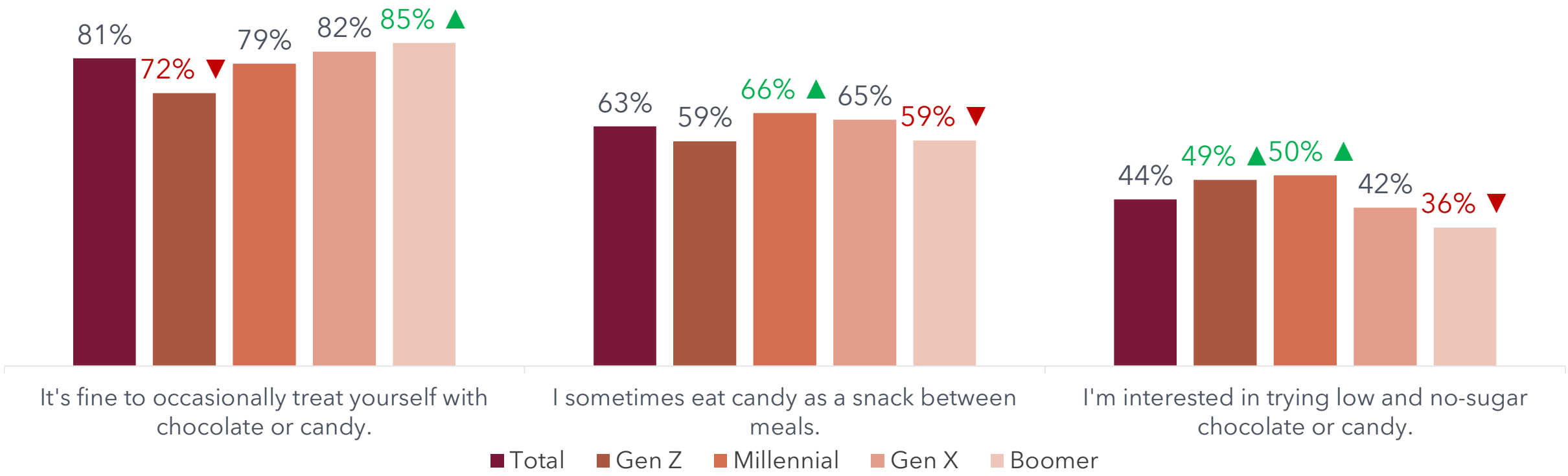
COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

The Vast Majority of Americans Enjoy Treating Themselves with Chocolate or Candy, Boomers Most of All

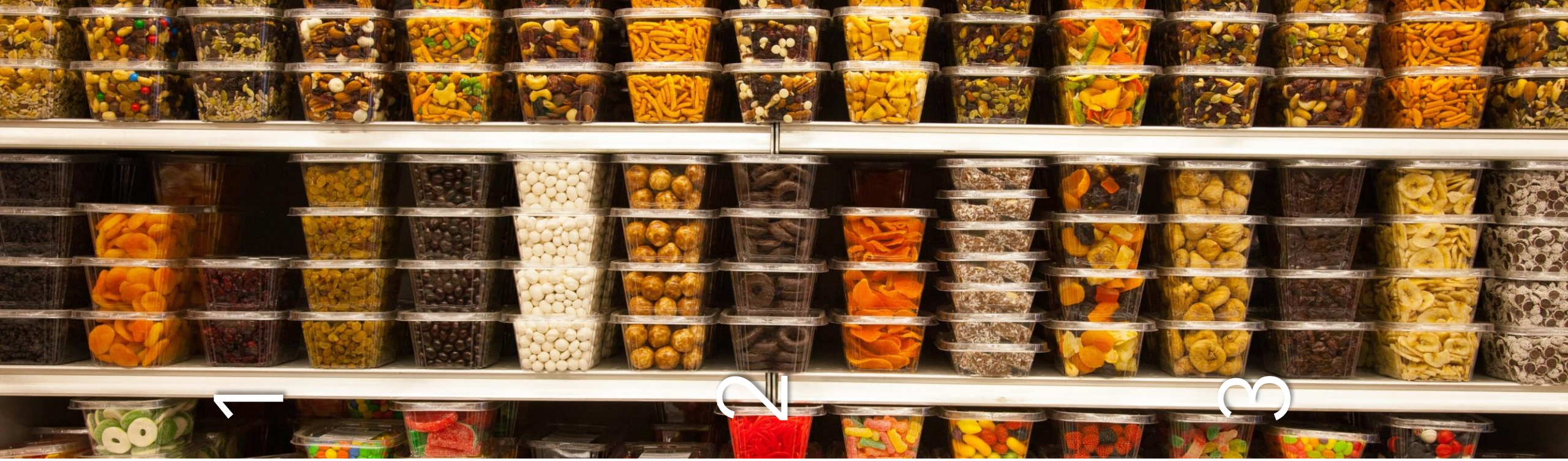
Gen Z and Millennials Drive Interest in Low and No Sugar Chocolate or Candy



COLLAGE GENERATIONS

Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL



1 Consumption

2 Drivers
Category & Product

3 **Shopping**
Information Gathering
Price & Promotion
Location

COLLAGE GENERATIONS

COMPANY CONFIDENTIAL

Key Takeaways and Action Steps: **Food Shopping**

Know This	Do This
When shopping for groceries, generations differ in their approaches to getting the best value. Boomers are more likely to compare prices in store, stock up when items are on sale, and look for coupons, whereas Millennials compare prices online and buy items in bulk.	• **Communicate product value in different ways depending on your target segment**. For Boomers, offer coupons and sales. For Millennials, highlight the 'cost per' value that can come from buying items in bulk.
Gen Z and Millennials are the least likely to stick closely to grocery lists, and instead tend to purchase more items than they initially planned to.	• **Make shopping off list easy for younger consumers** by offering meal plans, recipes, and demos in store, as well as by promoting tempting items on end caps and in store displays.

COLLAGE GENERATIONS

COMPANY CONFIDENTIAL

Recommendations from Family or Friends Are Most Powerful When Deciding to Try a New Food Item, Especially among Boomers

Millennials Especially Read Reviews and a Quarter of Younger Consumers Get Recs from Social Media

Where have you gone (or would you go) for information and/or recommendations when shopping for food items you haven't tried before such as snacks, desserts, frozen foods, meal ingredients, etc.?

	Total	Gen Z	Millennial	Gen X	Boomer
Ask family or friends	49%	47%	48%	47%	52%▲
Browse in-store	47%	41%▼	46%	47%	49%
Read customer reviews	38%	37%	42%▲	36%	36%
Visit brand websites	30%	29%	30%	33%	28%
Read online articles	30%	29%	31%	30%	28%
Ask or look for recommendations on social media	20%	28%▲	27%▲	17%	10%▼
Ask a salesperson in-store	16%	19%	20%▲	14%▼	12%▼

COLLAGE GENERATIONS

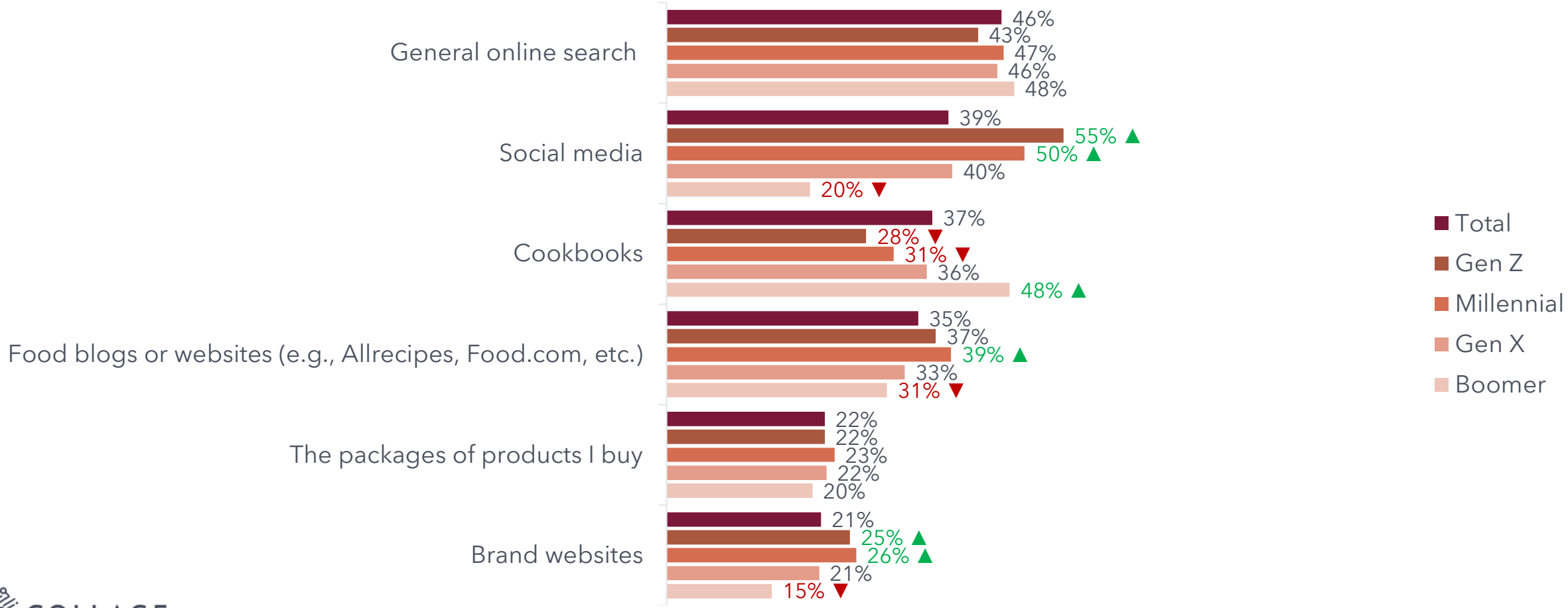
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Gen Z and Millennials Most Often Look for Recipes on Social Media When Cooking Something New

Searching Online Is Common across Ages but Boomers Are Especially Likely to Open a Cookbook

Where do you usually look for new recipes when you're interested in cooking or baking something new?



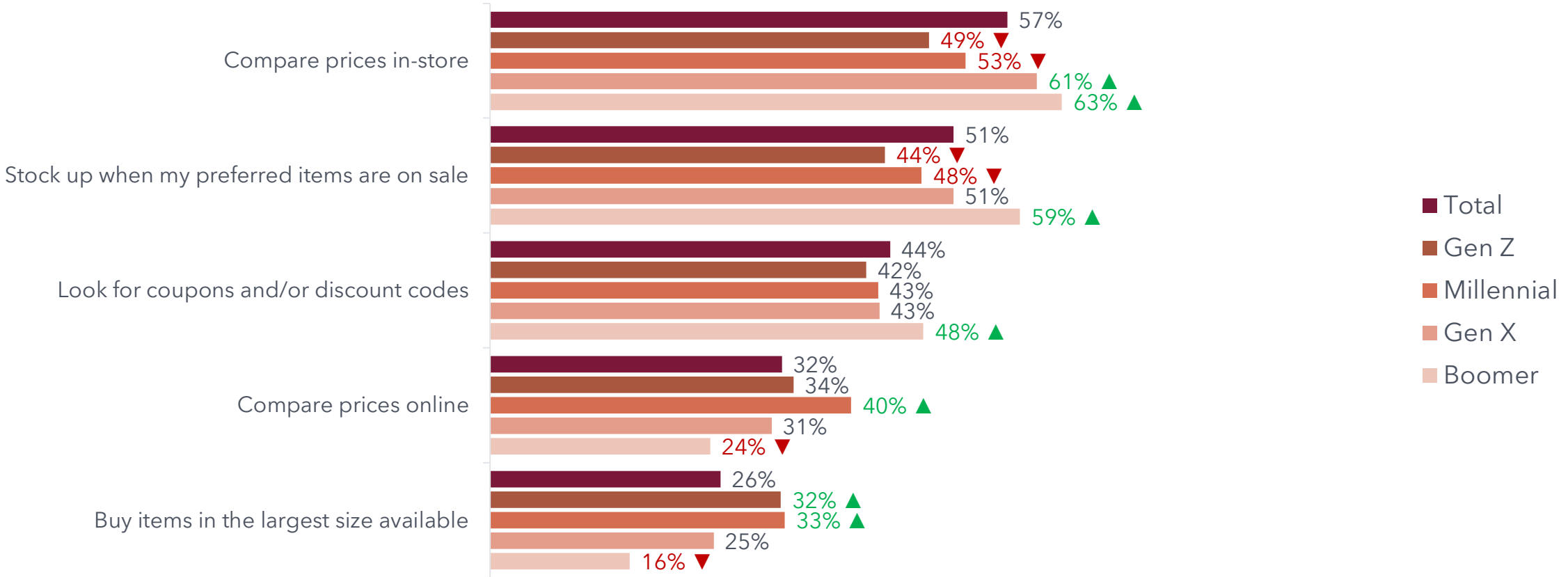
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Half of Americans Compare Food Prices In-Store and Stock up When Their Preferred Items Are on Sale, Especially Older Consumers

Gen Z and Millennials Are More Likely to Buy in Bulk

Which of the following have you done (or would you do) when shopping for food items such as snacks, desserts, frozen foods, meal ingredients, etc.?

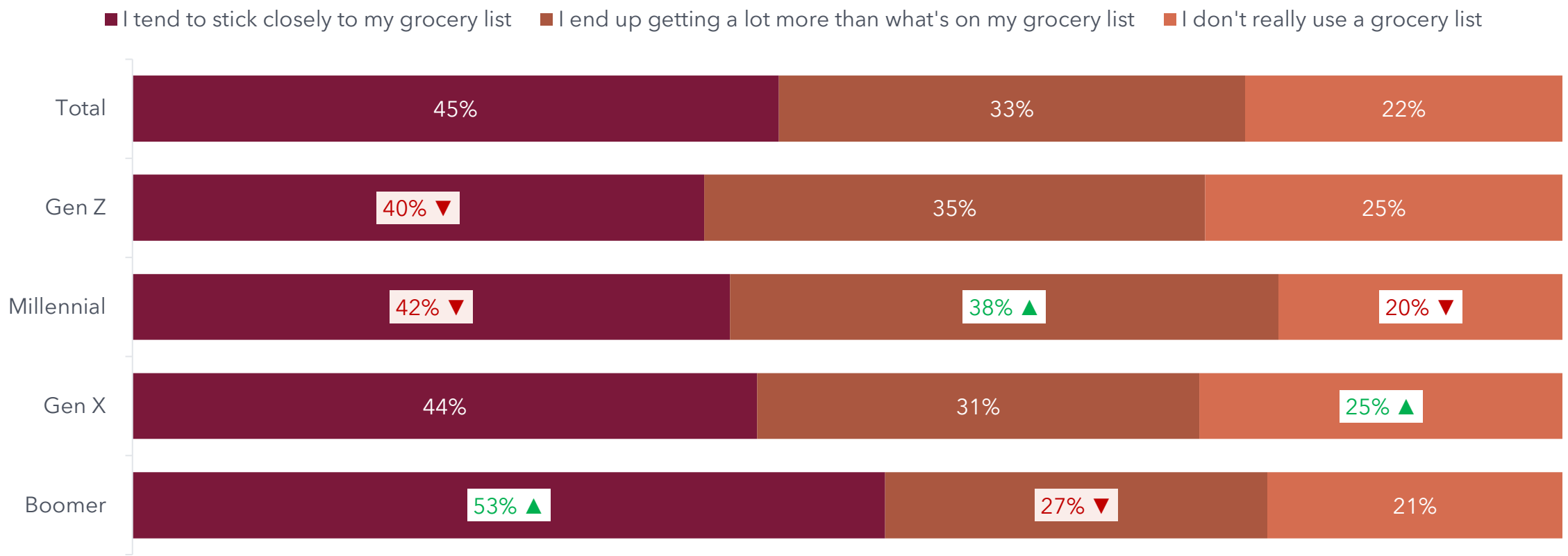


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

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Millennials Are Most Likely to Buy More than What's on Their Grocery Lists while Boomers Are Especially Inclined to Stick to it

How would you describe your usual grocery shopping behavior?



COLLAGE GENERATIONS

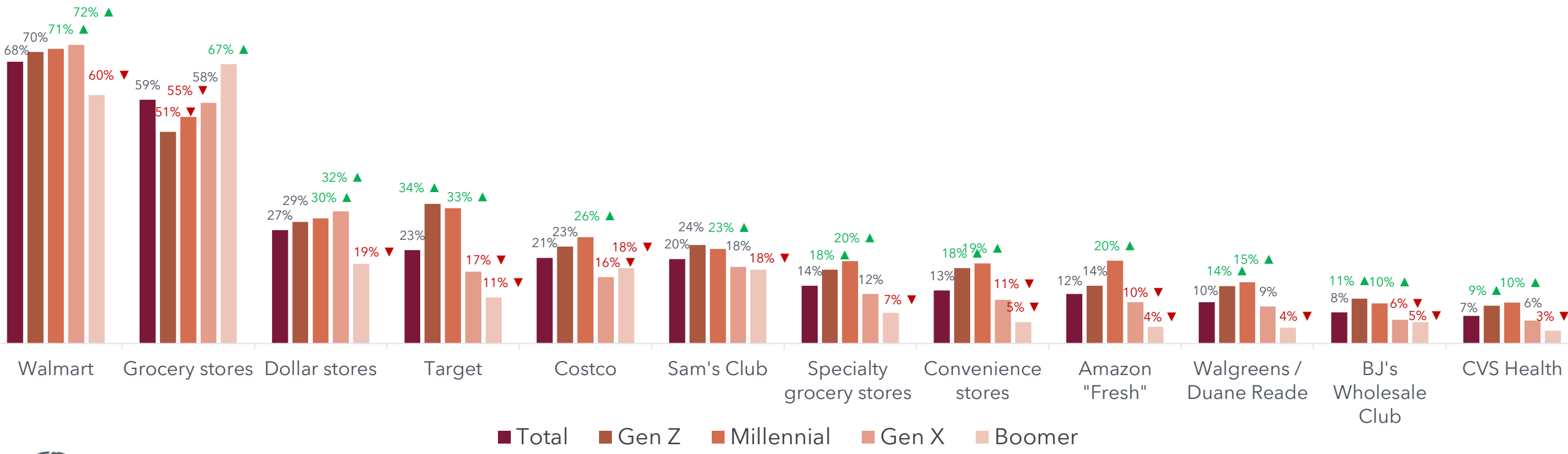
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Americans Most Often Shop for Food Items at Walmart and Grocery Stores, Especially Gen X and Boomers

Gen Z and Millennials Go to a Wider Variety, Standing Out for Shopping at Target and Warehouse Clubs

Where do you usually purchase food and other grocery items, either in person or online?



COLLAGE GENERATIONS

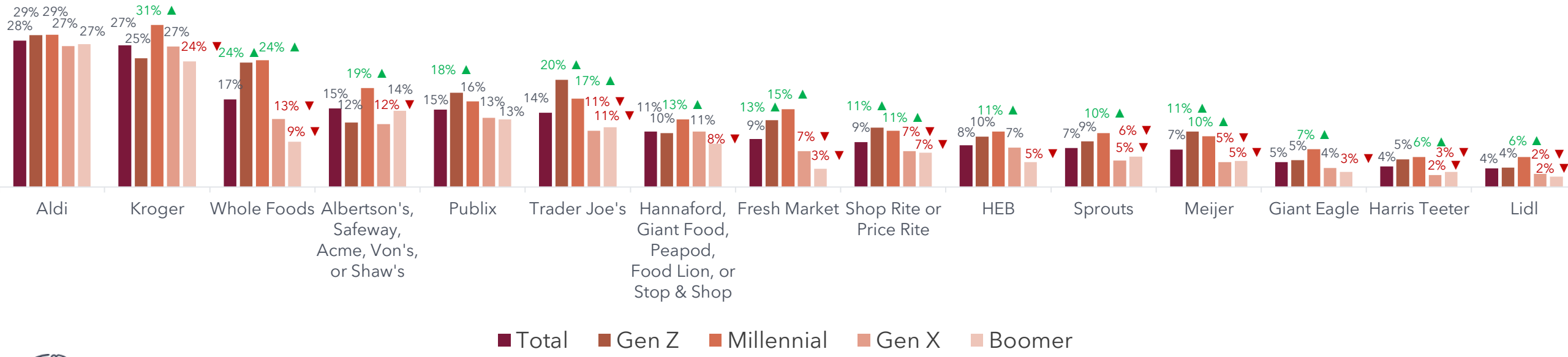
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Aldi and Kroger Are the Most Popular Grocery Stores Overall

Younger Consumers Are More Likely Go to Whole Foods, Trader Joe's, and Other Regional Stores

Thinking specifically about grocery stores, which of the following do you usually shop at?

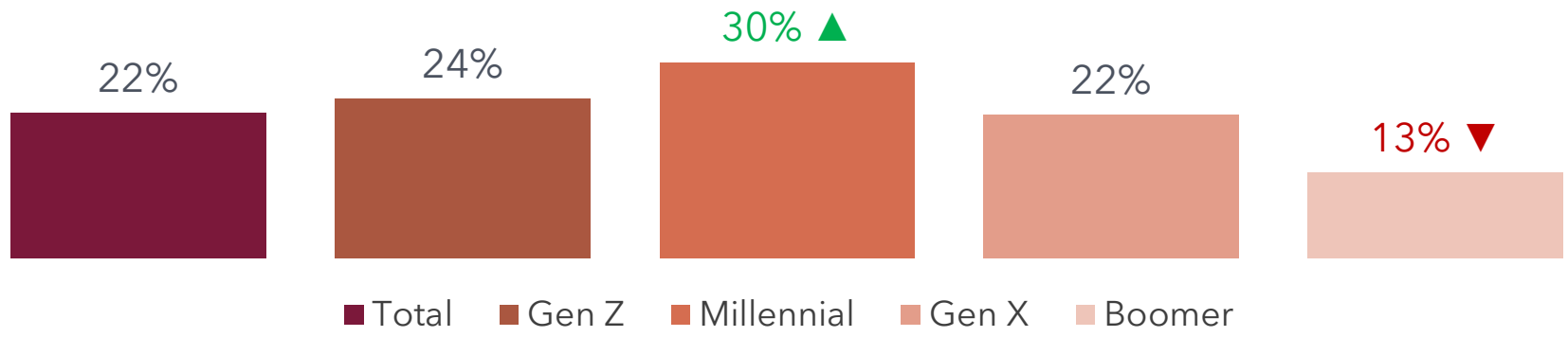


Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Millennials Are Most Likely to Struggle to Find Conveniently Located Grocery Stores

There are no grocery stores conveniently located near my house



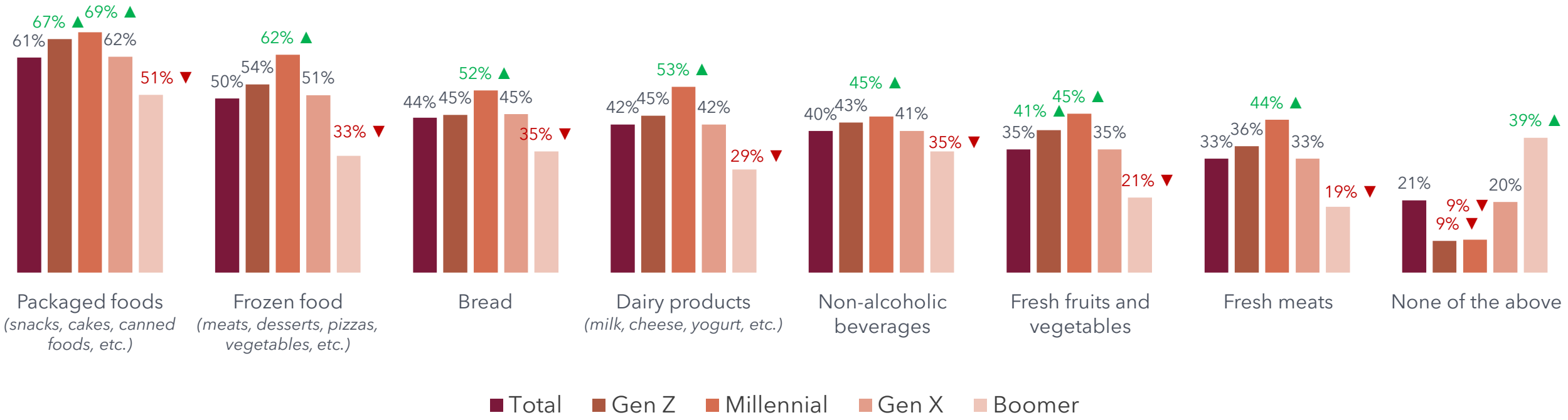
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
% agree, strongly agree
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Millennials Are More Comfortable than Others with Buying a Variety of Grocery Items Online

Packaged and Frozen Foods Are Considered the "Safest" to Order Online

Which of the following would you be comfortable buying online for delivery or pickup, without seeing it in person first?



COLLAGE GENERATIONS

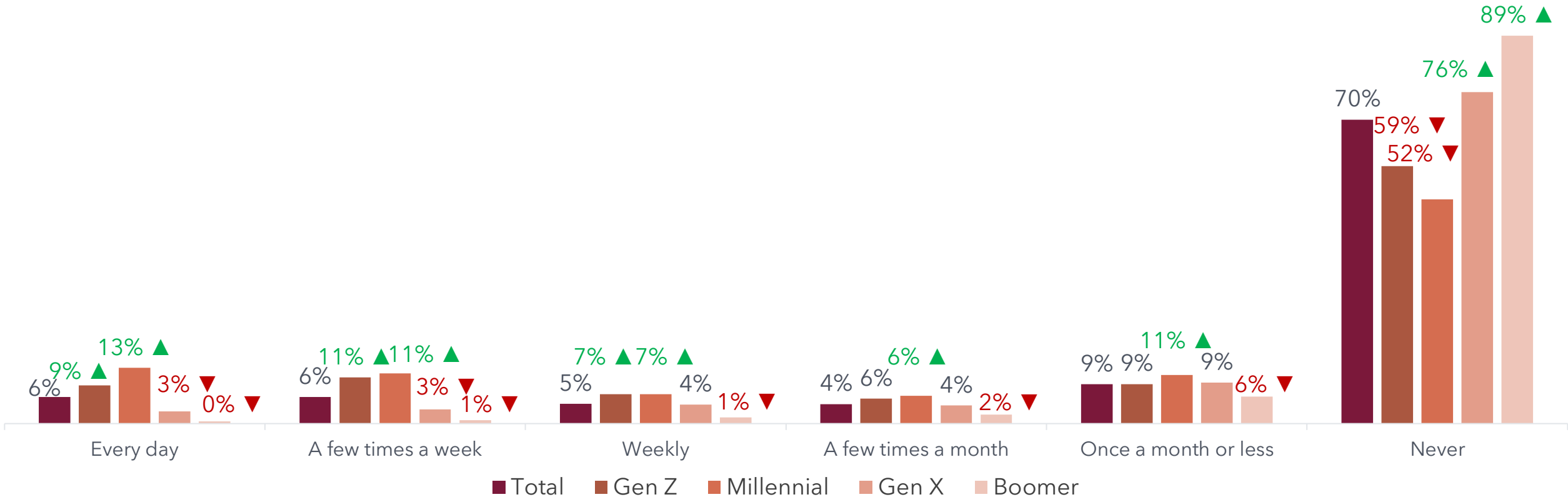
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Multiselect
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Millennials Tend to Order Meal Kits More Often than Other Generations

The Vast Majority of Gen X and Boomers Never Do

How often do you do the following? **Order a meal kit (like Blue Apron, HelloFresh, Home Chef)**



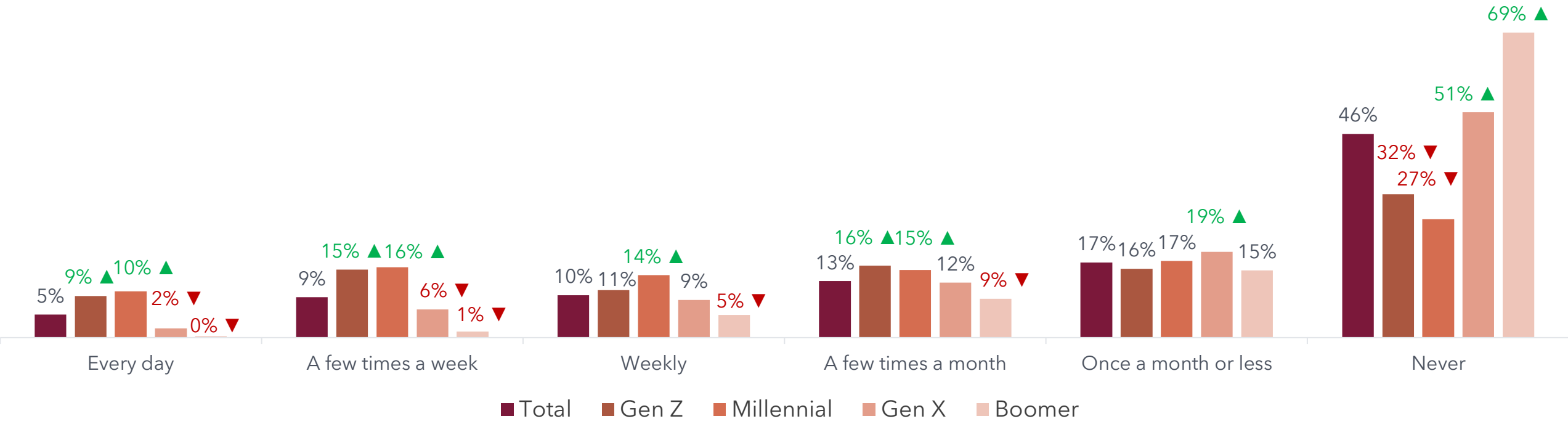
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Over Half of Gen Z and Millennials Order Groceries for Pick-up

Many Older Consumers Never Use Pick-up

How often do you do the following? **Order groceries for store or curbside pick-up**



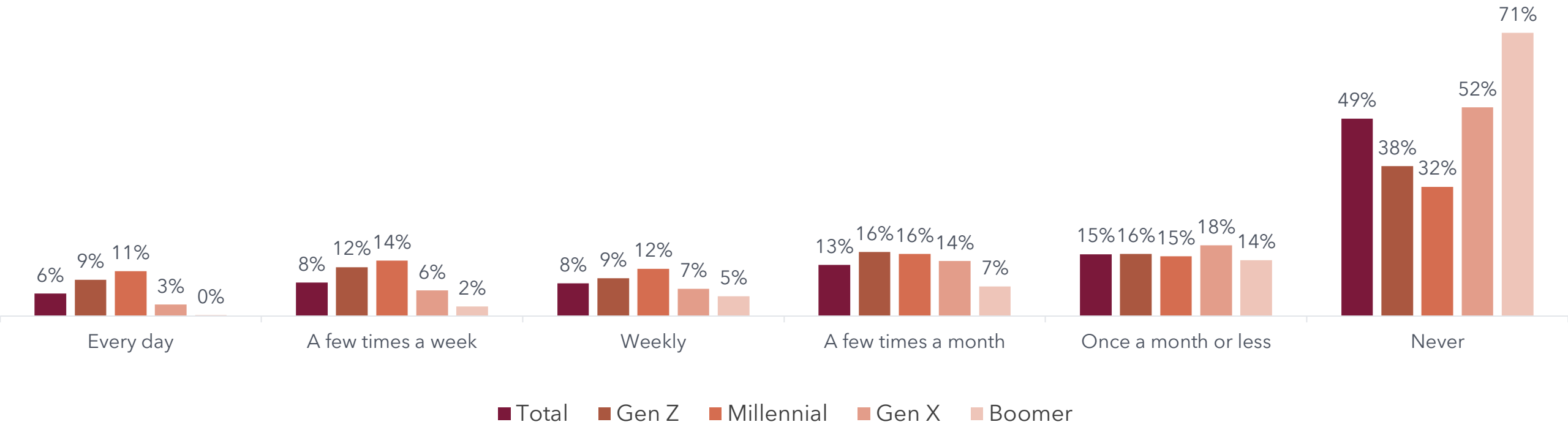
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

COMPANY CONFIDENTIAL

Younger Gens Tend to Take Advantage of Grocery Delivery More Often

Over Half of Gen X and Boomers Never Use Grocery Delivery

How often do you do the following? **Order grocery delivery (either directly or through an app)**



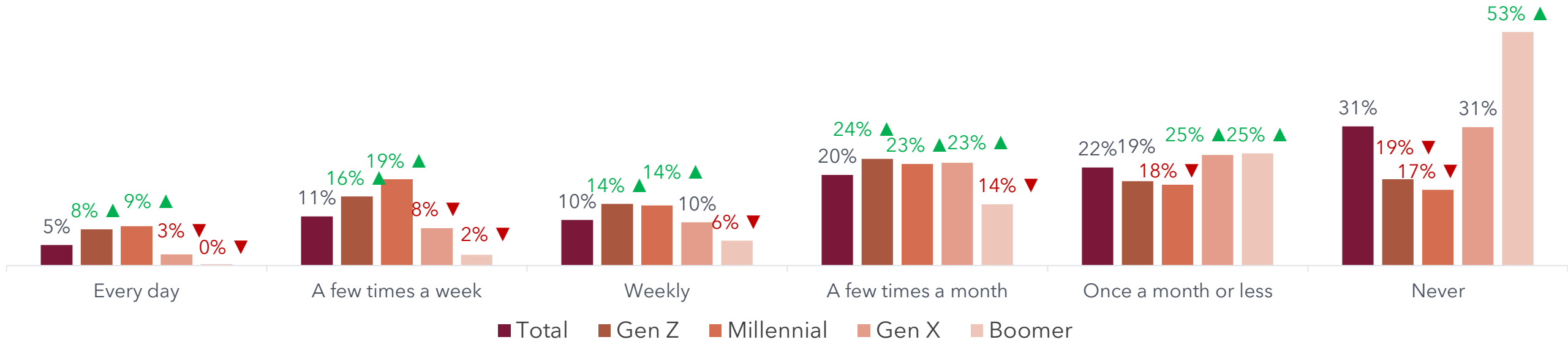
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

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Over a Third of Gen Z and Millennials Order Restaurant Delivery at Least Weekly

They Get Delivery Much More Frequently than Older Generations, Half of Boomers Never Do

How often do you do the following? **Order delivery from restaurants (either directly or through an app)**



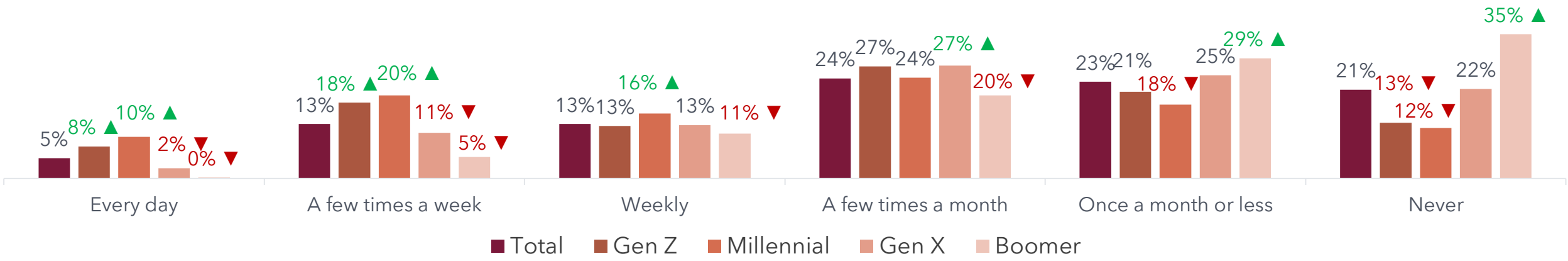
Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

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Younger Gens Lead on Ordering Restaurant Carryout Compared to Gen X and Boomers

About Two-Thirds of Gen X and Millennials Get Takeout at Least a Few Times a Month

How often do you do the following? **Order carryout from restaurants (either directly or through an app)**



Source: Collage Group Category Essentials Summer 2023, 18-77 population, weighted data
Single select
Significance test: Confidence level 95%. ▲▼ over/under Total

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Thank You!
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