

Butterball Togetherness Report

Capitalizing on Consumer Appetite for Shared Meals



BUTTERBALL®

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Introduction

Of the many ways we can pass love on to the people in our lives, coming together over a home-cooked shared meal is a timeless tradition. But how are these important moments of connection – not just holiday celebrations but family meals and get-togethers with friends – faring amid the pressures of modern life?

The average American spends more than five hours a day¹ scrolling social media and watching TV. Workplace stress is at an all-time high, with 59% of American workers – and 71% of Gen Z – experiencing burnout.²

It turns out that more consumers than ever are craving new and meaningful connections in the form of shared meals. As a trusted authority in bringing people together for holiday meals, Butterball sought to better understand this dynamic. We surveyed more than 2,000 consumers across the United States to uncover what shared meals mean to them, how they shop, and what they're looking for from grocery retailers.

Consumers want to have
more shared meals

69%

of consumers say they would
like to have more shared
meals if they could

This report explores the key trends we uncovered and reveals how grocery retailers can:

- 1** Capture more revenue year-round by helping consumers shop for more frequent and more satisfying shared meals
- 2** Reduce grocery shoppers' time and energy spent planning meals through store organization, recipe bundles, and friendly customer service
- 3** Provide inspiration, instill confidence, and create a fun shopping experience to attract younger consumers who are starting to host more shared meals
- 4** Increase basket size and loyalty by drawing more consumers when they are shopping for shared meals



¹ Josh Howarth, "Worldwide Daily Social Media Usage (New 2024 Data)," May 10, 2024, last accessed June 20, 2024, <https://explodingtopics.com/blog/social-media-usage>

² JD Farrugia, "9 crucial employee burnout statistics and trends (2023)," May 3, 2023, last accessed June 20, 2024, <https://workforce.com/news/statistics-on-employee-burnout>

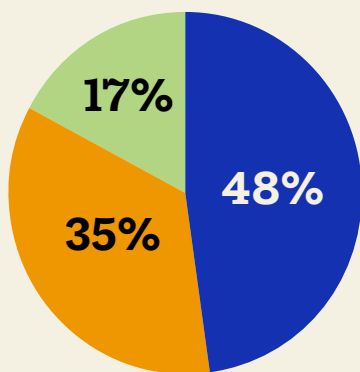
Capture more revenue outside of holidays by focusing on other shared meals

What is a shared meal? This study defined shared meals as planned meals prepared and eaten in a home with other people, whether they are family or friends. They include casual get-togethers and more formal gatherings, as long as the respondent buys some of the food, and they are with at least one other person for the meal. They do not include food eaten or prepared in restaurants.

For most consumers, the heart of shared meals lies in delivering a satisfying experience for guests. Casual meals and special occasions are also key for creating memories, enlivening everyday routines and adding a touch of magic to the dining experience.

Most common types of shared meals

While regular family meals amount to nearly half of the most common shared meals, casual gatherings account for more than one-third, with special occasions like celebrations or holidays making up the rest.



Immediate Family Meals: Prepared and shared with immediate family in the home for breakfast, brunch/lunch, or dinner. **Four guests on average.**

Casual Meals: Prepared and shared with family and/or friends in casual gatherings. **Seven guests on average.**

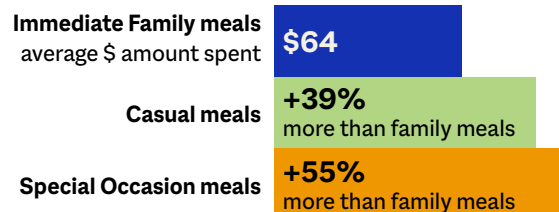
Special Occasion Meals: Prepared and shared with family or friends for special celebrations and holidays. **Nine guests on average.**



The high frequency of immediate family and casual meals, combined with the desire for even more of these occasions, represents an extended opportunity outside of holidays and special occasions for grocery retailers to engage with consumers, increasing loyalty and revenue year-round.

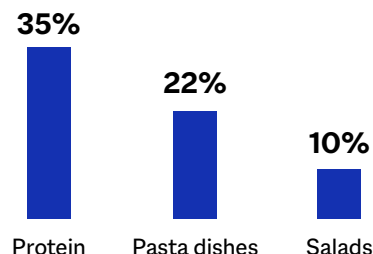
Comparison of average spending on most frequent shared meal type

Casual and special-occasion meals also feature more guests than immediate family meals, pointing to a wider variety of shopping needs and leading to higher overall spend.



Protein is the top dish to prepare for a shared meal

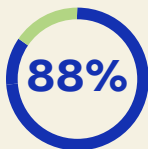
Providing a satisfying and complete meal is a key consideration for shared meals of all kinds. As such, protein - including meat, poultry, or seafood - is a staple of these occasions. Pasta dishes, salads, and other dishes are also common, but a centerpiece protein is the proven star.



Grocery shoppers will appreciate grocery retailers that offer a wider variety of proteins that are versatile across meal types.

Shared meals are important points of connection for people

Shared meals are also important for more than just filling people’s bellies. Research from leading institutions³ shows that strong social ties are associated with a sense of belonging, lower stress, and improved quality of life. Our survey showed a strong correlation between sharing meals and emotional well-being.



Say shared meals let them connect with people in their lives



Say they would like to have more shared meals if they could

Life satisfaction among those sharing meals more vs. less frequently over the last two years (shown: % agree)

■ Individuals sharing meals more frequently ■ Individuals sharing meals less frequently



By acknowledging the reasons consumers value shared meals, grocery retailers can better stay top of mind among consumers shopping for these occasions.

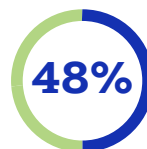


Emphasizing the benefits of shared meals can be a purpose-driven way for grocery retailers to encourage more shared meals and create affinity in the minds of consumers.

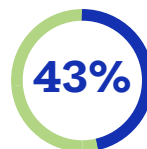
Benefits of shared meals



Staying connected with family and friends - true for all consumers across all shared meal occasions



Offering a break from my normal routine - true for consumers whose most frequent shared meals are casual gatherings



Making the meal feel unique with décor, plating, and ambience - true for consumers whose most frequent shared meals are special occasions

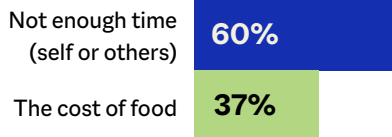
³ "Building Social Bonds," April 2018, <https://newsinhealth.nih.gov/2018/04/building-social-bonds>

Save consumers time on their meal planning and shopping

It's clear that people find value in shared meals and want to have more of them. So what's stopping them? The struggle is less about their budgets and more about their time. It turns out that grocery shoppers are willing to spend more money on shared meals, with busy schedules emerging as one of the most common barriers to having them more often.

Across all kinds of shared meals, more than half of grocery shoppers spend 30 minutes or more preparing them, our survey found. But the time spent actually cooking is just one part of a much larger "mental load"⁴ associated with shared meals. Hosts must coordinate schedules, invite guests, assess dietary needs, find suitable recipes, clean house, and shop for ingredients.

Reasons people don't have more shared meals



While online grocery shopping is poised to grow, there's a clear need for grocery retailers to bridge the gap between the convenience of online shopping and the trust and sensory satisfaction of in-store experiences.

Shared meals drive desire for in-store experience



Many grocery retailers have introduced online platforms and mobile apps to make grocery shopping more convenient. Research shows that about one in five Americans have shopped online for groceries in the past 30 days.⁵ However, grocery shoppers currently prefer to use such services to buy premade meals, processed foods and snacks rather than fresh meat and produce.⁶ The ability to see, touch, and even smell products is a crucial part of the shopping experience, especially when planning for important shared-meal occasions.



The main barrier for grocery shoppers when it comes to having more shared meals is lack of time, not money. Grocery retailers can ease the planning burden for time-crunched shoppers by suggesting recipe ideas online, generating in-app ingredient lists, and offering expert customer service.



⁴ "No, you can't just ask your wife to make a list. This is how to become equal household partners," Madeline Holcombe, CNN, November 13, 2023, <https://www.cnn.com/2023/11/13/health/mental-load-sharing-tasks-wellness/index.html>

⁵ "Nearly 20 percent of U.S. shoppers bought groceries online in 2022," USDA Economic Research Service, last updated February 26, 2024. <https://www.ers.usda.gov/data-products/chart-gallery/gallery/chart-detail/?chartId=108618>

⁶ "Number of Americans grocery shopping online is up 13% from pre-pandemic," Brooke Just, Supermarket Perimeter, August 23, 2023, <https://www.supermarketperimeter.com/articles/10132-number-of-americans-grocery-shopping-online-is-up-13-from-pre-pandemic>

Attract and inspire younger generations of hosts

Shared meals are a weekly occurrence for three-quarters of all grocery shoppers. Yet important differences emerged between generations. For instance, younger consumers enjoy shared meals more frequently and have more casual meals with friends. Older generations, who are more likely to have life partners and children, sit down for family meals more often.

Percentage of respondents who share a meal at least once a week



87% Older Gen Z/ Younger Millennials

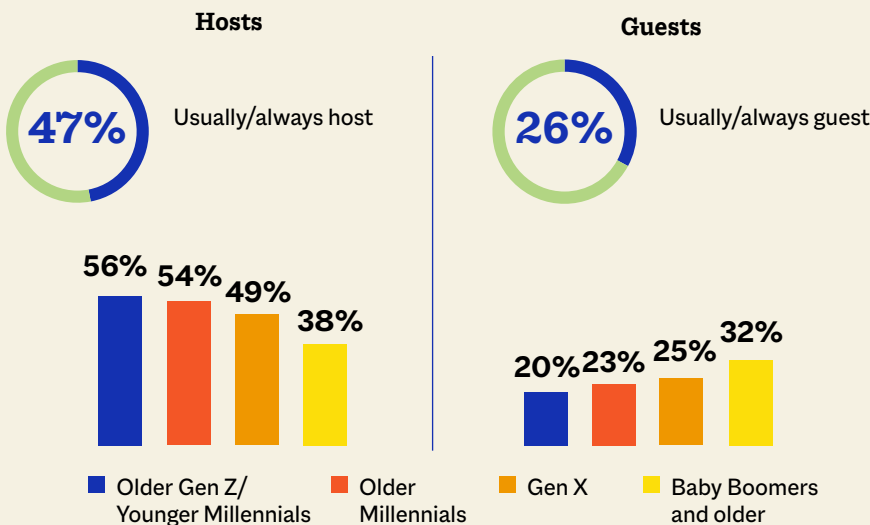
80% Older Millennials

77% Gen X

65% Baby Boomers and older

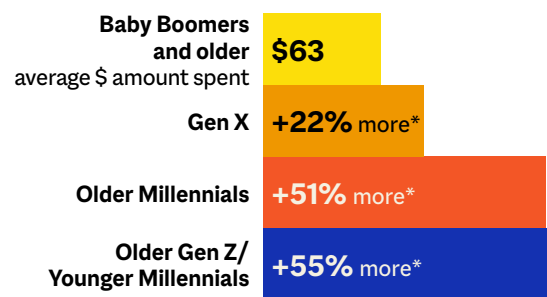
Generational differences in hosting shared meals

About half of all grocery shoppers usually serve as the host for shared meals. Younger generations are more likely to host, while older consumers are more likely to be guests. Household size is also a strong factor as 85% of respondents living with a spouse or partner and kids say they host at least half the time, compared to 63% of those who live alone.



Relative average cost of all shared meals by generation

Younger generations also spend significantly more on shared meals of all kinds. External data and analysis⁷ suggest that this might be a way to control costs versus eating out more frequently and is also driven by a preference for specialty items.



*vs Baby Boomers and older



For younger consumers, grocery retailers should focus marketing efforts on the fun and social aspects of meals while emphasizing family moments for older grocery shoppers.

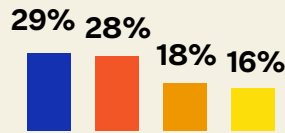
⁷ "Gen Z is cooking more and shopping less as they struggle with inflation," Fortune, October 13, 2023, <https://fortune.com/2023/10/13/gen-z-cutting-spending-dining-out-inflation/> | "Gen Z, Millennials Splurge on Food as Confidence Increases," NACS, April 17, 2024, https://www.convenience.org/Media/Daily/2024/April/17/5-GenZ-Millennials-Splurge-Food_Marketing | "To Gen Z, food is the new luxury. What does that mean for fashion?," Vogue Business, June 1, 2023, <https://www.voguebusiness.com/fashion/to-gen-z-food-is-the-new-luxury-what-does-that-mean-for-fashion?> | "Americans are spending more on this than anything else (it's not luxury)," TheStreet, April 9, 2024, <https://www.thestreet.com/retail/young-people-spend-more-money-on-this-essential-than-anything-else>

Another generational difference is that over the last two years, younger age groups have been having more shared meals while older ones are having fewer. Moreover, while large majorities of all generations say they want to have more shared meals, that trend is even stronger among younger people.



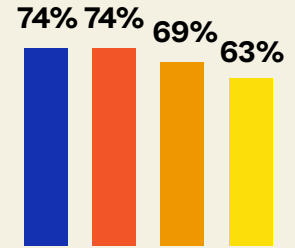
Considering that hosts are more likely heads of larger households, grocery retailers should look for ways to bundle everyday items into shopping trips for shared meal occasions or offer tips on making the most of leftovers.

Percentage of age groups saying they are having more shared meals

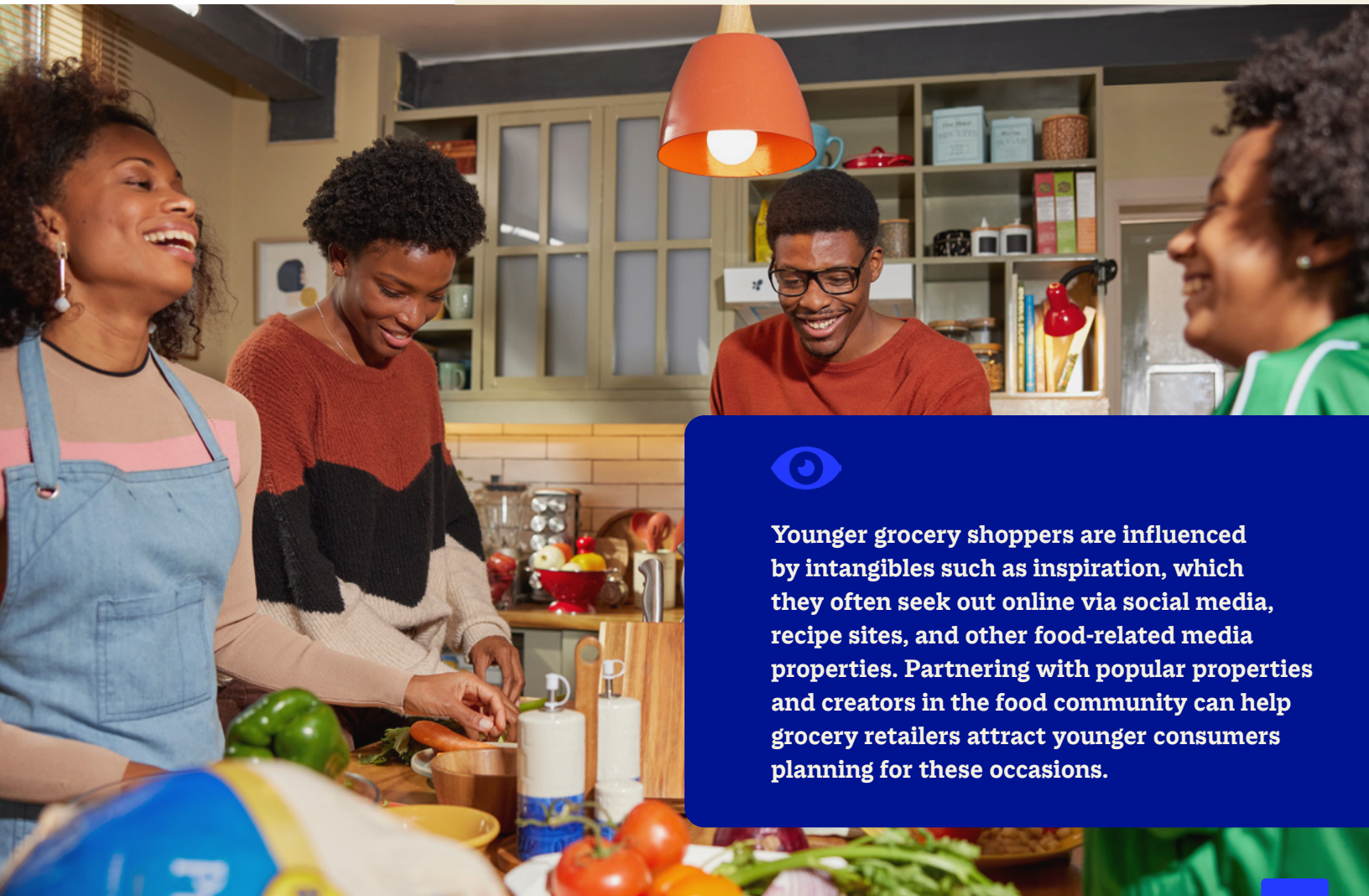


Older Gen Z/Younger Millennials Older Millennials

Percentage of age groups saying they would have more shared meals if they could



Gen X Baby Boomers and older



Younger grocery shoppers are influenced by intangibles such as inspiration, which they often seek out online via social media, recipe sites, and other food-related media properties. Partnering with popular properties and creators in the food community can help grocery retailers attract younger consumers planning for these occasions.

Boost basket size and loyalty by catering more to shared meals

While affordability is an important consideration factor, when grocery shoppers explain why they chose to visit specific stores for shared meals, they speak about convenience and product selection more than value. This underscores the other findings that it's not all about cost when it comes to deciding where to shop for shared meals.

Why grocery shoppers select certain stores most often for shared meals



Shared meals act as a tide that lifts all stores, albeit to different degrees. While large chain grocery retailers, wholesalers, and specialty or local outlets all see gains in shoppers for shared meals versus regular grocery runs, specialty, and wholesale stores draw disproportionately more consumers for these occasions.

The choice of grocery store is significant, with nearly nine in ten people saying some stores are better than others when it comes to shopping for shared meals specifically. Moreover, grocery shoppers are more likely to venture beyond their usual store to visit more and different kinds of stores when planning for a shared meal.

Proportionate gain in grocery shoppers for shared meals vs. regular grocery shopping



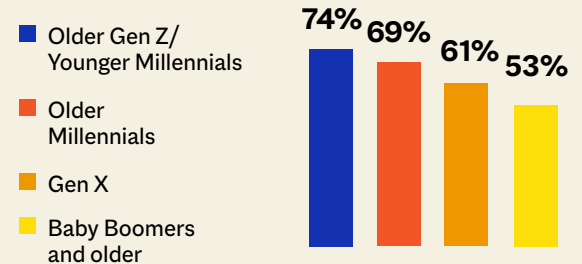
Grocery shoppers shop differently for shared meals



By offering inspiration to help with planning for shared meals, and providing a varied in-store assortment, grocery retailers can supply the full meal, helping them reduce the need for multiple stops and increase their basket size.

Percentage that will travel further to shop at a specific store

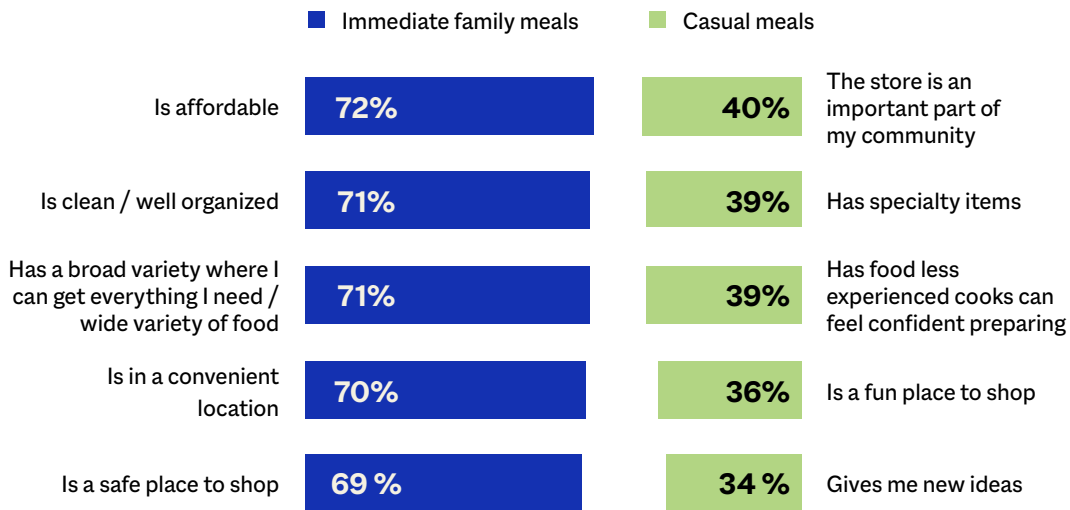
More than six in ten shop at multiple stores and are willing to travel further to visit specific ones, an inclination that grows among younger grocery shoppers. This suggests that younger generations may be more flexible and place higher importance on the shopping experience for shared meals.





Importance of each factor when deciding which grocery store to shop at for a shared meal

When it comes to casual meals with friends and special occasions, stores that offer community presence, meal inspiration, and a positive shopping experience take priority over practical considerations such as affordability, variety and convenience.



Importance of each factor when deciding which grocery store to shop at for a shared meal (For gen z + millennial)

Younger generations also prefer stores that feel stress-free, offer items besides food, are involved with the community, and that share their values and beliefs. They value specialty items and food that less-experienced cooks can prepare.



68%

Is a safe place to shop

56%

Has items besides food that I need for the occasion

46%

Has specialty items

43%

Has food less experienced cooks can feel confident preparing

43%

Is a fun place to shop

42%

Gives me new ideas



Many grocery shoppers make multiple stops when shopping for shared meals in search of different and specialty items, and because they seek a pleasant and fun experience. Focusing on these elements and providing a sense of community can help large grocery retailers retain regular customers when they shop for these occasions.

Wrapping it all up

Gathering over food connects us with one another, enriches our lives, and creates a sense of well-being. Despite the day-to-day distractions of modern life, consumers are eager to bond over shared meals more frequently. Grocery retailers can tap into this desire - while boosting sales and loyalty - by making it easier for consumers to plan and shop for these occasions.

Key takeaways

Here are four ways grocery retailers can capitalize on consumer appetites for more shared meals:

- 1 Capture more revenue year-round by helping consumers shop for more frequent and more satisfying shared meals.** The high frequency of regular and casual shared meals, combined with the desire for even more of these moments, represents an extended opportunity for grocery retailers to engage with consumers year-round beyond special occasions. Protein plays a central role in making these meals satisfying to participants.
- 2 Reduce grocery shoppers' time and energy spent planning meals through store organization, recipe bundles, and friendly customer service.** Consumers struggle with schedules more than their budgets. To help, grocery retailers can emphasize store organization, convenience, and selection that enable consumers to efficiently get what they need and make their shared meals worthwhile, satisfying and memorable.
- 3 Provide inspiration, instill confidence, and offer a fun shopping experience to attract younger consumers coming into their own as hosts.** Younger consumers are influenced by intangibles such as inspiration and confidence, as well as being a fun, safe, and stress-free place to shop. Grocery retailer outreach emphasizing these characteristics can help attract these consumers.
- 4 Increase basket size and loyalty by drawing more consumers when they are shopping for shared meals.** Grocery shoppers seek out stores, often local, that offer specialty items and complete meals that everyone will enjoy. Focusing on these elements and providing a sense of community can help grocery retailers retain regular customers in those moments when they are shopping for shared meals.

Survey methodology

A 15-minute online survey was fielded from May 1-14, 2024, in the contiguous United States. The survey reached 2,127 respondents ages 24+ who share or are primary grocery purchasing decision-makers for their household, and who had some type of shared meal more than once in the last year. We included a minimum age of 24 to focus on adults more likely to be independent household decision-makers. For analysis purposes, Older Gen Z/Younger Millennial includes ages 24-34 (n=371), Older Millennials are ages 35-43 (n=403), Gen X includes ages 44-59 (n=554), and Baby Boomers and older are age 60+ (n=799).

