



GEN Z 2018

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HARTMAN GROUP NATIONAL SYNDICATED RESEARCH

GEN Z 2018: Today's Teens — Tomorrow's Adults

Poised on the Threshold to Be a Major Cultural and Market Force



A HARTMAN GROUP NATIONAL
SYNDICATED RESEARCH REPORT

GEN Z ARE DIVERSE, CONNECTED, AWARE, AND SOCIALLY AND POLITICALLY ENGAGED. WITH ITS OLDEST MEMBERS JUST ENTERING THEIR 20S, THIS GENERATION IS POISED TO BE A DISRUPTIVE FORCE CULTURALLY AND AS A MARKET.

The Hartman Group's *Gen Z 2018* report explores this generation's values, attitudes, and approaches when it comes to food and beverages, eating and cooking, health and wellness, sources of information and inspiration, food retail, and restaurants. *Gen Z 2018* focuses on Gen Z teens aged 12-20, with relevant comparisons to older generations: Millennials, Gen X, and Baby Boomers.

As always, we use our signature combination of rich qualitative and robust quantitative methodologies to understand these emerging consumers and illuminate the opportunities and challenges they pose to the food and beverage industry.

METHODOLOGY

Quantitative Approach

Nationally representative survey, fielded April, 2018

Sample

- Total: n=1,991
- Gen Z: n=1191 (Aged 12–20, evenly distributed across years of age)
- Gen Pop: n=800 (General U.S. population, aged 21–72 years)

Reporting Groups: Generations

- Gen Z: aged 12–20
- Millennials: aged 21–39
- Gen X: aged 40–53
- Boomers: aged 54–72

Reporting Groups: Gen Z age groups

- Middle School: enrolled in grade 8 or below during the 2017–2018 school year
- High School: enrolled in grades 9–12 during the 2017–2018 school year
- High School Graduates: high school graduates and not enrolled in grades 9–12 during the 2017–2018 school year

Qualitative Approach

Fielded in April, 2018

In-home ethnographies with teens and parents

30–45-minute parent interview followed by 75-minute teen interview. Teen interviews included a tour of kitchen and pantry/food storage.

Teens completed a homework assignment prior to their interview: a collage about what health, wellness, and feeling good looked like in their lives.

Mobile Qualitative with teens

6-day mobile qualitative engagement. Teens responded each day to tasks and questions via a qualitative research-focused smartphone app. Tasks included photo galleries, videos, creative-imagery exercises, cooking assignments, and self-reflection.

Sample

- Aged 12–18
- Must be enrolled in public or private school
- Mix of gender, household income, age of children in household, race/ethnicity, and U.S. census regions

Notation: Teens' words and images are noted throughout the report and include initials, age, and gender.

ABOUT THE REPORT

General report (PowerPoint and PDF) including executive summary and demographic data tables (Excel). Product Price:

- List: \$15,000
- Now: \$12,000

Release Date: June 2018
Report Length: 111 pages
Market Coverage: U.S. market

To purchase the report, fill out the order form on the last page of this overview.

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EXECUTIVE SUMMARY: HIGHLIGHTS

Who Are Gen Z?

A large cohort, Gen Z are both the most diverse and connected generation in U.S. history.

The key cultural touchstones of Gen Z's teen years include economic crisis and recovery, a divisive political scene, and environmental reckoning.

Gen Z are also unique in their intense, intuitive engagement with technology.

Approaches to Cooking and Eating

Until they graduate high school, Gen Z rely on the adults in their lives to provide them with food and beverages.

Currently, Gen Z tend to have simpler palates than Millennials and are less motivated by health and wellness (H+W).

Busy household schedules mean that teens do much of their own food prep and often eat alone for every meal except dinner (and occasionally at dinner, too).

With so much autonomy at home and easy access to information and instruction, Gen Z are actually quite confident in the kitchen. A practical generation, they see cooking as an accessible life skill available to anyone with an internet connection.

Perspectives on Health + Wellness (H+W)

Growing up in today's wellness culture – with its emphasis on holistic, personalized H+W – and with years of health education in the classroom, Gen Z are likely the most educated teen cohort the U.S. has seen when it comes to H+W.

On the other hand, Gen Z are young and have few health worries, so while they know the “rules” of H+W, they don't feel a strong need to follow them just yet. They prioritize fun and flavor as often as, if not more than, what is “right.”

EXECUTIVE SUMMARY: HIGHLIGHTS

Sources of Information and Inspiration

Gen Z are connected to the world through their phones, and food is no different. Whether entertainment, instruction, or inspiration, they look to their phones first, and in fact most of their instruction comes via entertainment.

Retailers and Restaurants

When choosing where to get their food and beverages – retailer or restaurant – Gen Z weigh price, location, experience, and quality.

When it comes to groceries, teens don't really begin to think about shopping until after high school, when they begin doing more of it for themselves. This means that most don't have well-developed personal opinions about brands, retailers or channels, or purchasing criteria yet.

Teens are more likely than others to shop at convenience stores and vending machines, and the categories they purchase the most are snacks, sweets, and beverages.

More than half of Gen Z regularly eat school or college food service,

which often provides more tasty, healthy options and more flexibility in terms of eating on or off campus than in the past. Despite these improvements, however, the actual school lunch period is often extremely short and can be very early or late in the day.

Today's Teens – Tomorrow's Adults

Diverse, connected, aware, socially and politically engaged, Gen Z are set to be a major cultural and market force.

Gen Z prize home cooking and are fairly confident about their skills, but their eating habits deprioritize meals.

When it comes to H+W, Gen Z will eventually feel more motivated to follow the rules they learned as teens – a varied, balanced diet of fresh, real foods without “chemicals” or too much sugar, exercise, self-care, and balance.

Online shopping and delivery is going to play a major role in Gen Z's future food-sourcing habits.

APPROACH TO H+W

Teens have fully embraced their parents' understanding of H+W as balance in all parts of life



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