





GEN Z 2018

Study Methodology

Primary Quantitative Research

Approach	Nationally representative survey, fielded online in April 2018 Topics included: <ul style="list-style-type: none"> • Attitudes, approaches, and behaviors around: general worldview, food, eating, cooking, health + wellness • Sources of inspiration and information related to food and platform/devices used • Shopping for household and self, including P3M retailers shopped for groceries and categories purchased • Retailer appeal and food/beverage purchase criteria • Restaurant visitation and whom with 	
Sample	Total: n=1991	
	Gen Z: n=1191 <ul style="list-style-type: none"> • Aged 12–20, evenly distributed across years of age 	Gen Pop: n=800 <ul style="list-style-type: none"> • General U.S. population, aged 21–72 years
Reporting Groups	Generations are defined as: <ul style="list-style-type: none"> • Gen Z: aged 12–20 • Millennials: aged 21–39 • Gen X: aged 40–53 • Boomers: aged 54–72 	

Primary Qualitative Research

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.
 	
NJ (Female, 17) and mom SJ in their home	
GH (Male, 15) making stir-fried tofu and broccoli	

Gen Z represent close to a quarter of the U.S. population, but the generation's age limits have yet to be fully defined

Boomers: 54–72 years old

The “silver tsunami:” hitting retirement and a number of health issues.

Gen X: 40–53 years old

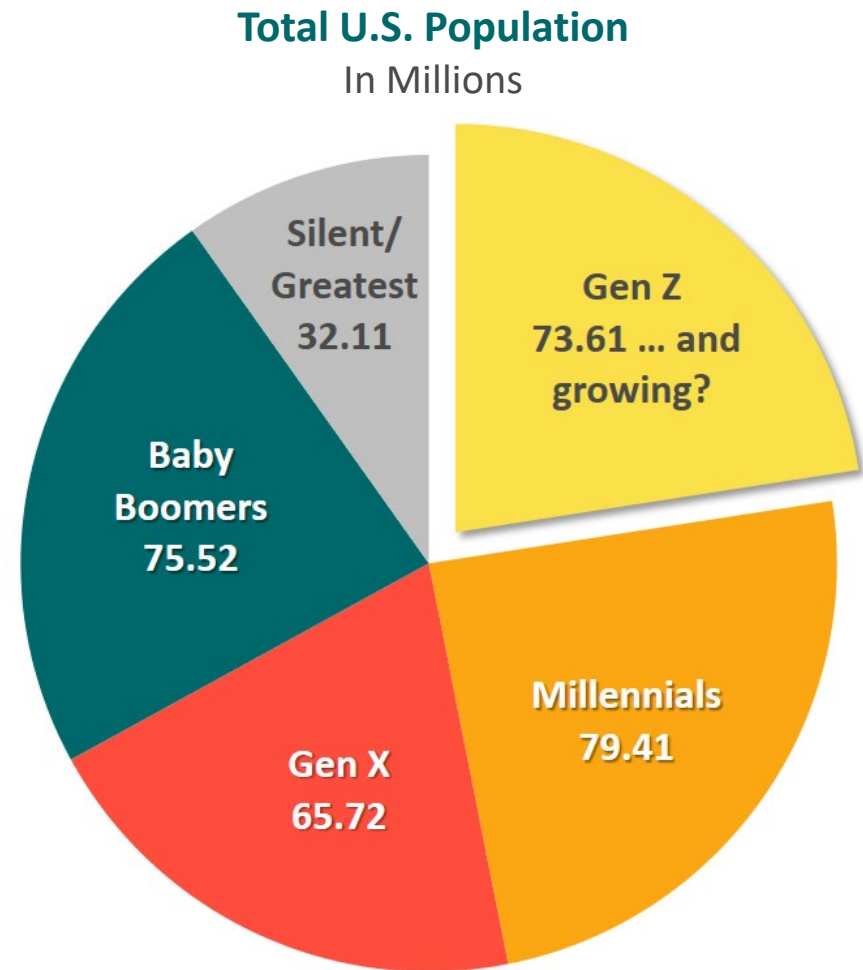
The sandwich generation: fairly established career-wise, caring for their aging parents and their teen children.

Millennials: 21–39 years old

Coming into their own: starting to hit their stride career-wise, establishing families and settling into “adult” routines.

Gen Z: birth to 20 years old

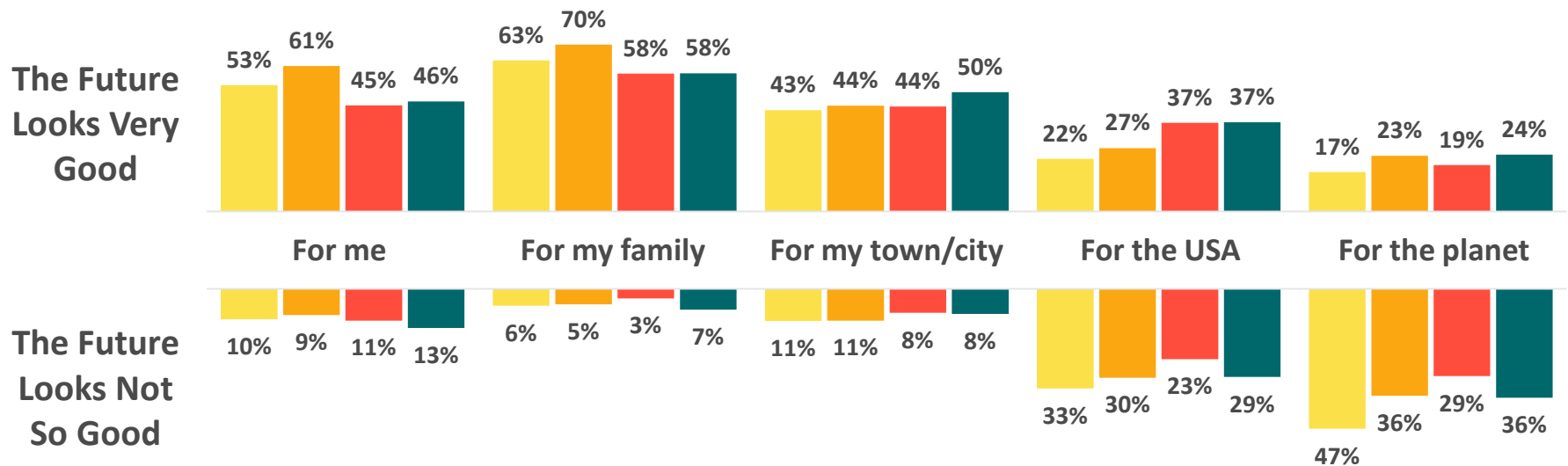
The new kids on the block: loosely applies to those born between the late 1990s and early 2010s.



Gen Z are clear-eyed about the future – less sure of themselves than Millennials and more fearful for the planet and country than any generation

Optimism for the Future by Generation

Gen Z Millennials Gen X Boomers



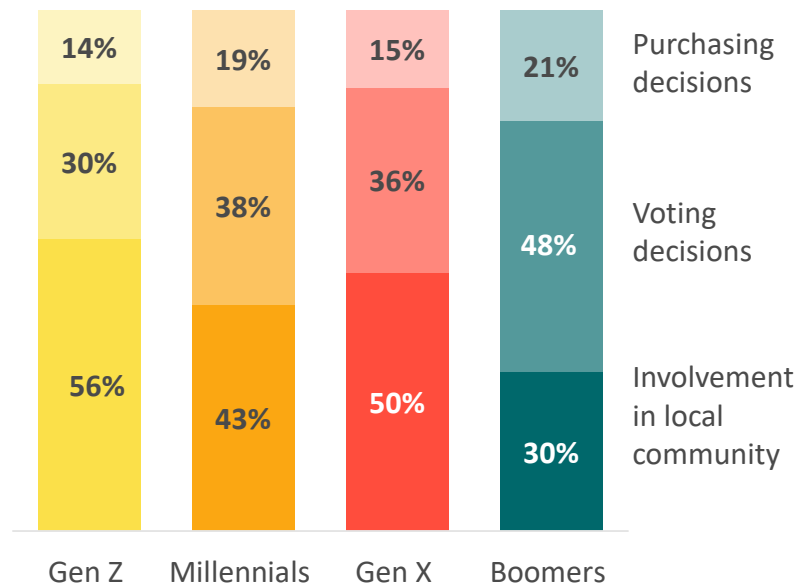
I hope I can get a reasonable job and the economy's not in the gutter by then. I hope that there's still jobs and they haven't all been automated.

EV, Male, 18

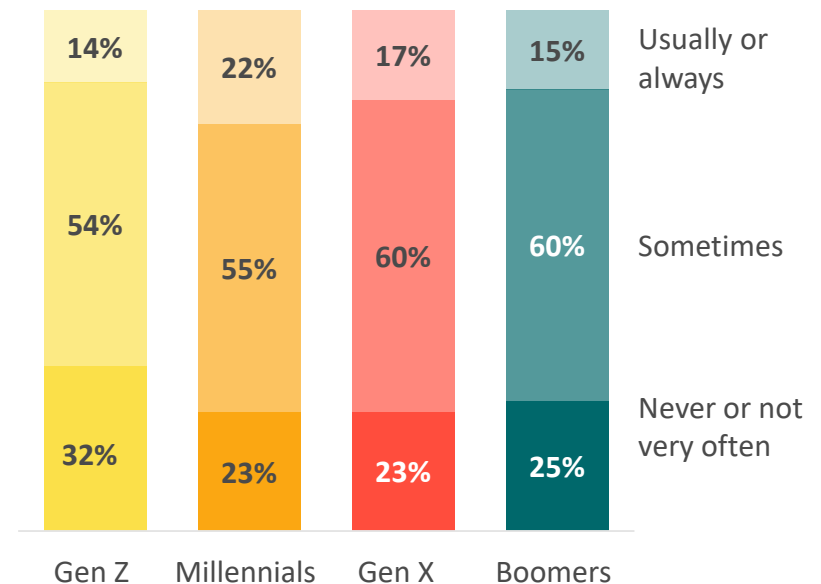
Gen Z see local action as having the biggest impact on society, and purchasing has much less; they are likewise less likely to consider bigger issues in their purchasing

Gen Z are still young, with limited financial resources and responsibility, so it is premature to say that sustainability or social issues will be unimportant to their purchasing. Given their values, sustainability will likely grow in importance as they gain purchasing power and experience.

**Biggest Impact
on Society
by Generation**



**Frequency of Considering Sustainability
and Social Issues in Purchasing
by Generation**



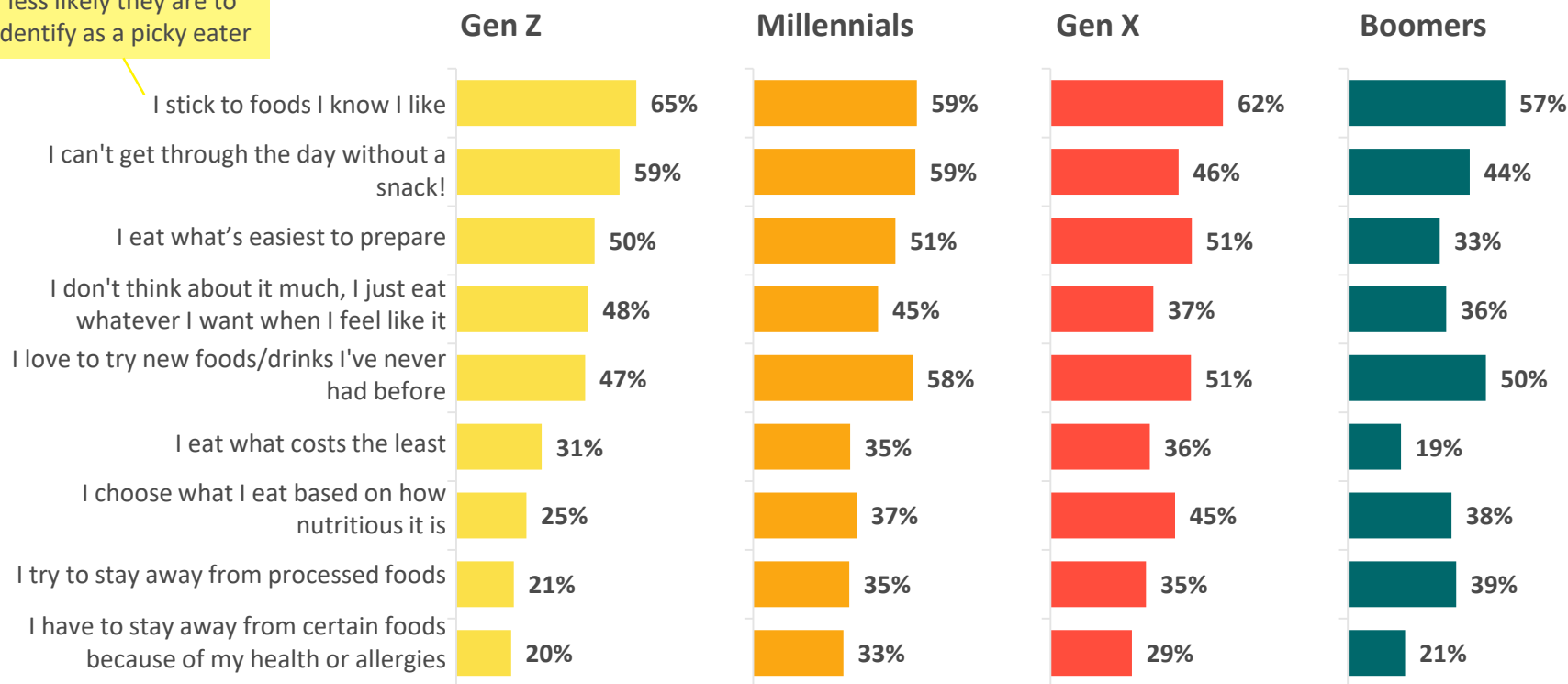
Gen Z currently look like a blend of Millennials and their Gen X parents, but they are still defining themselves and their preferences

Millennials are notorious for their desire for the new, but Gen Z – still children – are a bit more pedestrian in their tastes. Likewise, they're also less driven by nutrition or quality cues than other generations. Tracking these attitudes will be key as Gen Z gain more independence and experience.

Eating Approaches by Generation

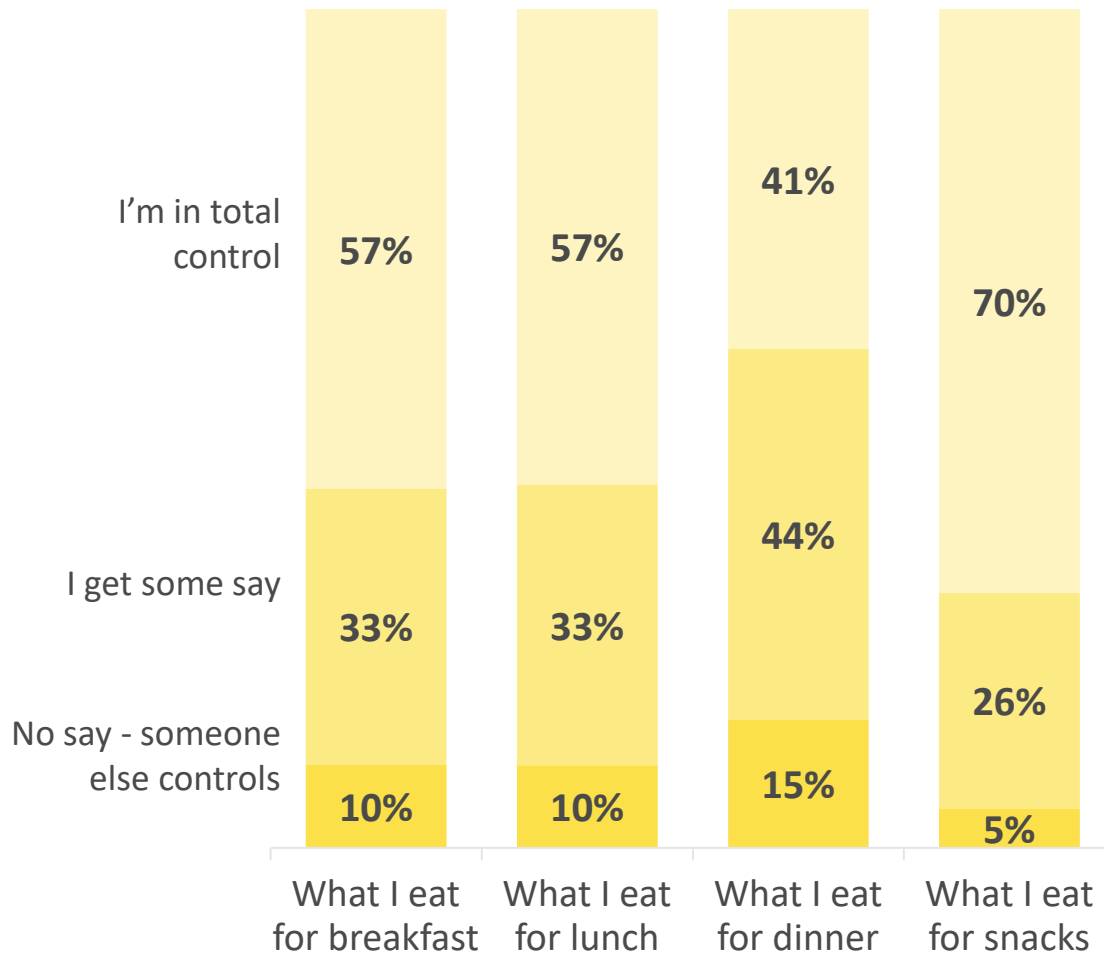
Top 2 Box of 5

The older the teen, the less likely they are to identify as a picky eater



Gen Z have a lot of autonomy over what they consume, especially for snacks

Gen Z's Level of Control Over Food Choices



One Parent's Strategy

I just do a lot of cooking on Mondays so that he can grab and go. Like a bacon and egg bake with a lot of vegetables. Then he scoops into that for breakfast.

Mom of EV, Male, 18

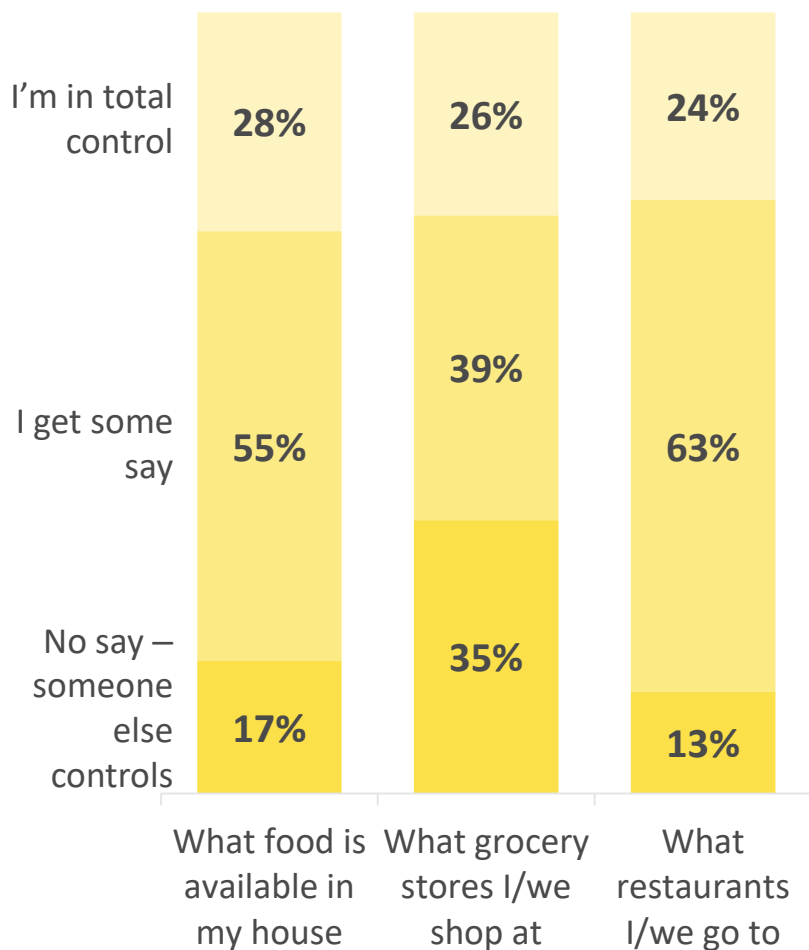
Profile of a teenage kitchen: NJ, 14, and her staples

NJ occasionally shops with her family, but more often, her parents buy what she likes, as long as it fits within their health and wellness criteria



While Gen Z have a relatively high level of control over what they eat, they have less over what is available and where it comes from

Gen Z's Level of Control Over Food Sources



Parental Strategies for Healthy Teen Eating



Limit less healthy snacks



Stock easy, healthy options



If it's in the house, it's OK



Make it in advance

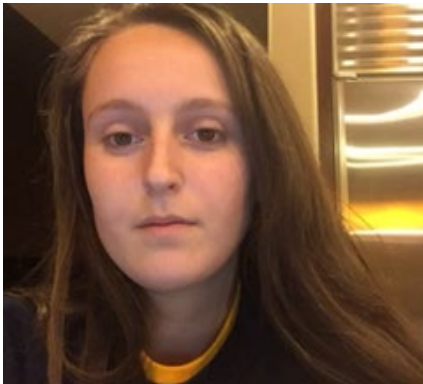
In keeping with long-standing trends – and teenage stereotypes – Gen Z are voracious snackers; snacking is everywhere and anywhere and at anytime

59%

of Gen Z say they can't get through the day without a snack (top 2 box of 5)

Yes, teenagers love to eat, and they snack for fun and out of boredom. But Gen Z also rely heavily on snacks to manage hunger, energy levels, and nutrition, especially when they cannot control other aspects of their eating, including:

- Busy schedules mean a skipped meal (musical rehearsal until 9:00 p.m.)
- Choices are limited due to setting or budget (nothing I like in the lunch line today)
- Little or no time to eat (short lunch period)
- Lack of cooking skill (parents not home for dinner)



I'm mostly cooking snack-type things when I'm home alone, like quesadillas, which I have basically every day after school. I like to make my own guacamole, so we have all the vegetables here in the fridge that I use, like my tomatoes, my onion, my avocado.

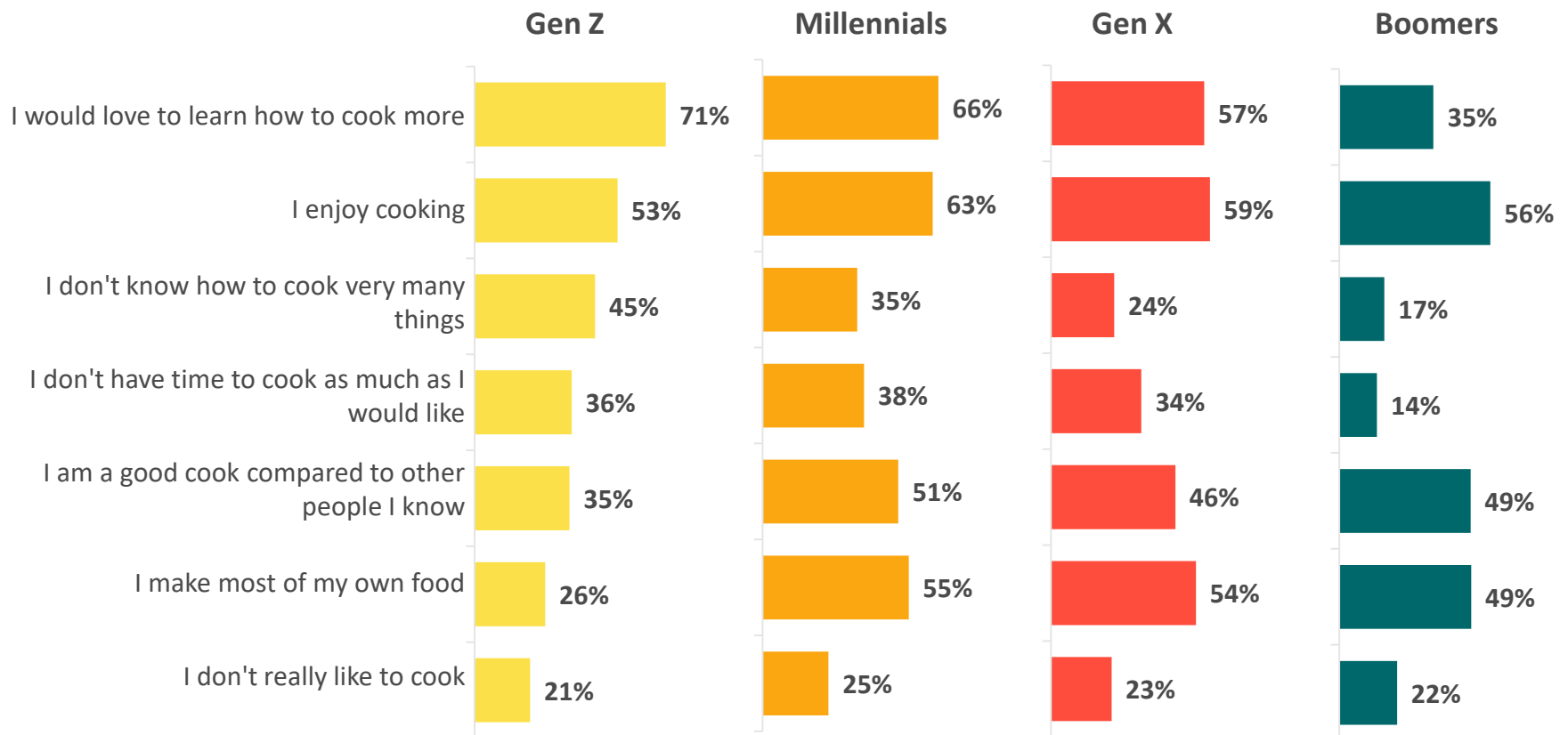
AM, Female, 17

Gen Z are less experienced cooks than older consumers, but they are very open to learning

Cooking Attitudes and Skills

by Generation

Top 2 Box of 5



Motivations for cooking vary – and range from fun to necessity

Entertainment



Food-as-entertainment is ubiquitous; it informs and instructs.

- TV programs and food photos on social media broaden teens' horizons and pique curiosity.
- Social media personalities, YouTube, and the snackable videos on Tasty and Delish make cooking look fun and easy.

Family time



Some families turn cooking time into quality time – an opportunity to connect.

- Sharing the cooking lets families socialize, decompress, and share the load.
- Many teens have special meals they cook with a parent (like breakfast with Dad).
- Studies have shown that having a parent who enjoys cooking with their children means the children eventually cook better, too.

Gotta eat!



Teens who have to feed themselves learn to cook faster.

- For some teens, conflicting schedules or personal preferences mean they are left to feed themselves most of the time.
- These teens teach themselves to cook out of necessity and often come to enjoy it.

Despite their youth, Gen Z have a sophisticated definition of wellness that goes beyond diet and exercise to include mental and social components

Health + Wellness According to Gen Z

INCORPORATE

- Eat whole, nutrient-dense foods
 - Eat the rainbow
 - Get enough protein
 - Incorporate healthy fats
 - Organic is better
- Read the label
- Get regular exercise
- Take time for self-care
- Everything in moderation

AVOID

- Stay away from chemicals
- Not too much sugar

Balance and Moderation Are Key

Health + Wellness in Action

Health and wellness is very important to me as I'm a dancer, so **eating healthy to fuel energy** is super important.

I currently **have a lot of dance stuff going on** after school, but I like to **go to the gym as much as I can** and do at least an hour workout.

I do these different things because **being healthy and caring about wellness makes you overall happy** throughout the day.

So along with going to the gym, **I love vegetables and fruit**, and our family always makes sure that **we always have something healthy along with our meal**, which is so great!

GD, Female, 17



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



Eating



Activity



Socializing



Tech

Balance healthy eating with occasional indulgences

Balance (physical and mental) relaxation and activity

Understand what recharges you and make sure you get enough of it

Shut it down and do something else...don't be one of "those people" glued to their phones

Part of health and wellness is also eating a well-balanced diet, including indulging in moderation, so when I want to indulge I don't feel bad physically or emotionally.

I have to force myself to stop playing video games to go be with friends and play basketball or something. Though sometimes, you do need those days once in a while to just do nothing.

I'm more introverted and like to hang out with just a few close friends. If I don't do that enough, I get kind of sad and grumpy. But if hang out with people too much, then I'm drained and tired.

I usually walk a line between relaxing on the computer and doing my homework. When I have an increasing sense of panic about my grades, I know it's time to get off the computer.

AM, Female, 17

CD, Male, 16

NBJ, Female, 14

EV, Male, 18



Wellness

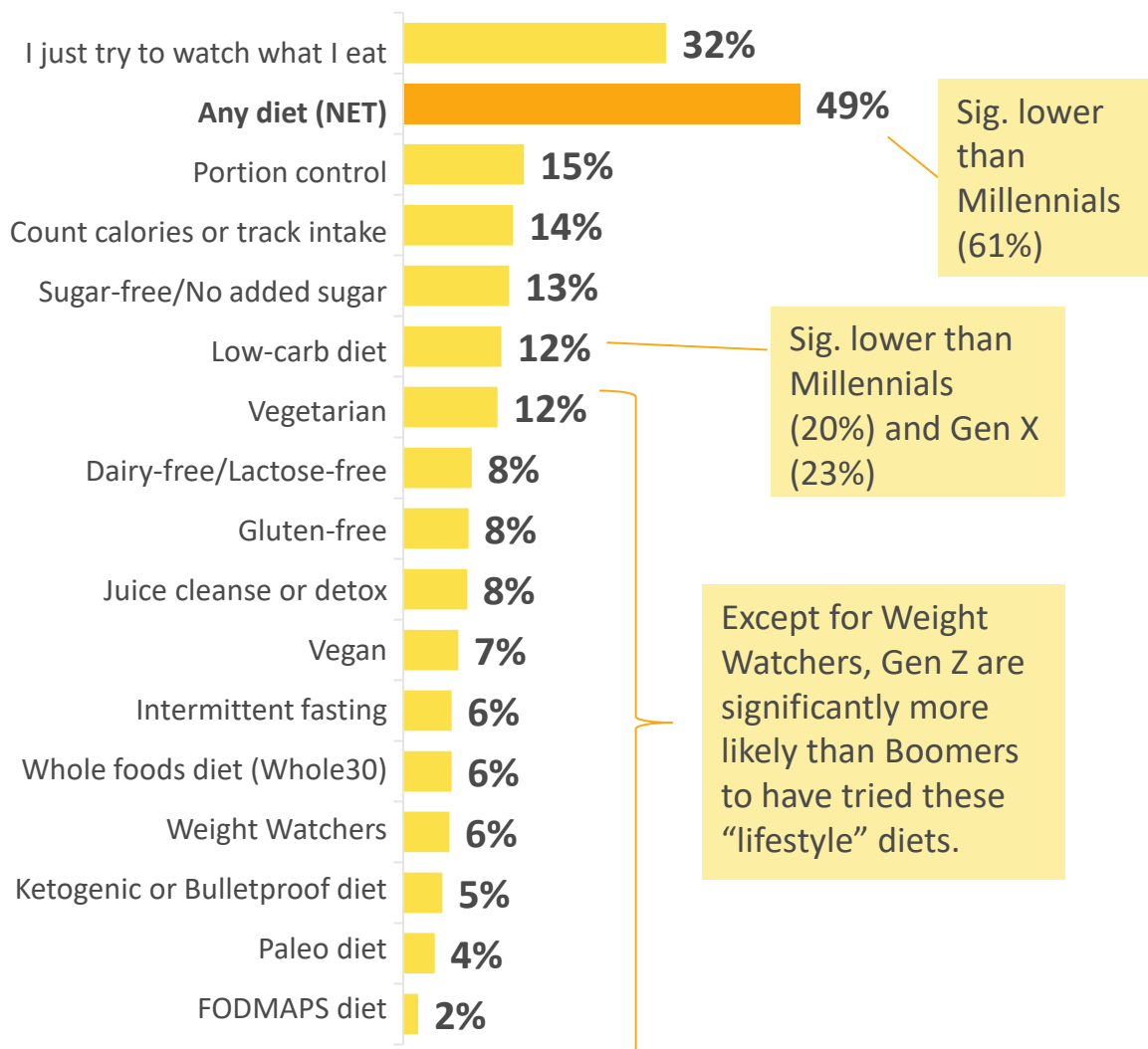
Balancing these aspects keeps you healthy and feeling good mentally, physically, and socially

Gen Z are starting to experiment with a variety of “lifestyle” diets

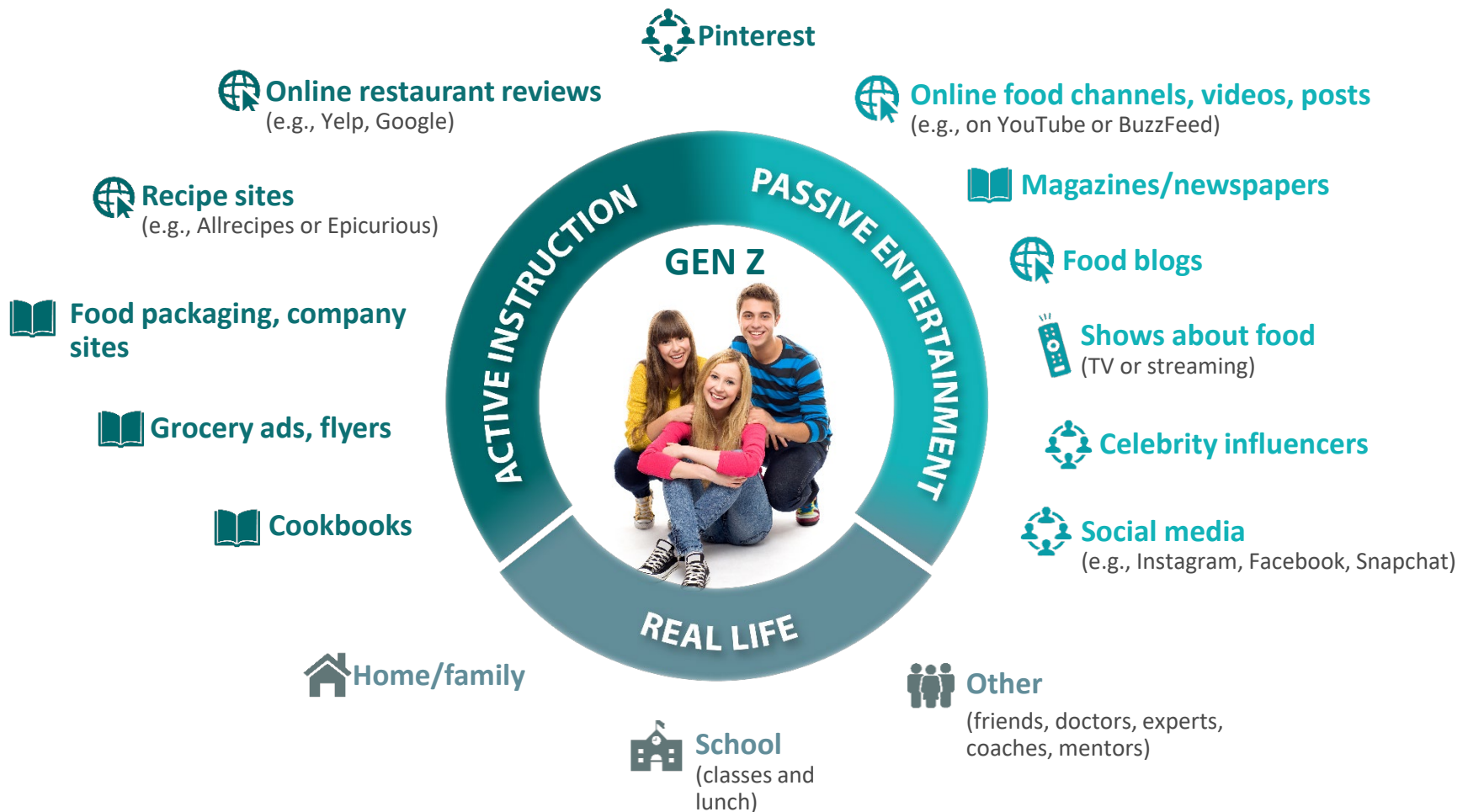
Average # of Eating Approaches Tried in P12M

Gen Z	1.3
Millennials	1.7
Gen X	1.5
Boomers	0.9

Gen Z Past-12-Months Eating Approaches



Teens' real-life worlds provide their food foundations, but entertainment sources influence their desires; both influence their active searches

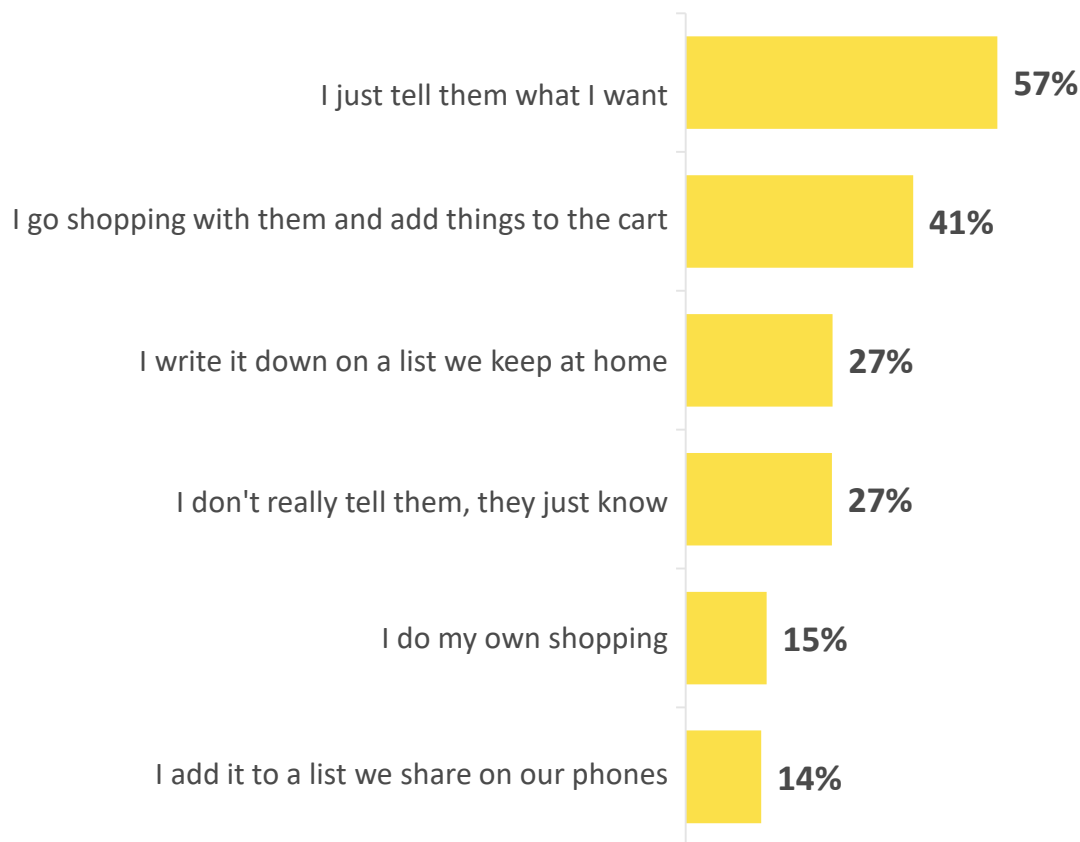


Gen Z's parents buy most of their teens' food and drinks up until the end of high school

Gen Z – Grocery List Practices

How Do Your Parents Know What to Get You?

Among Gen Z teens who live with parents

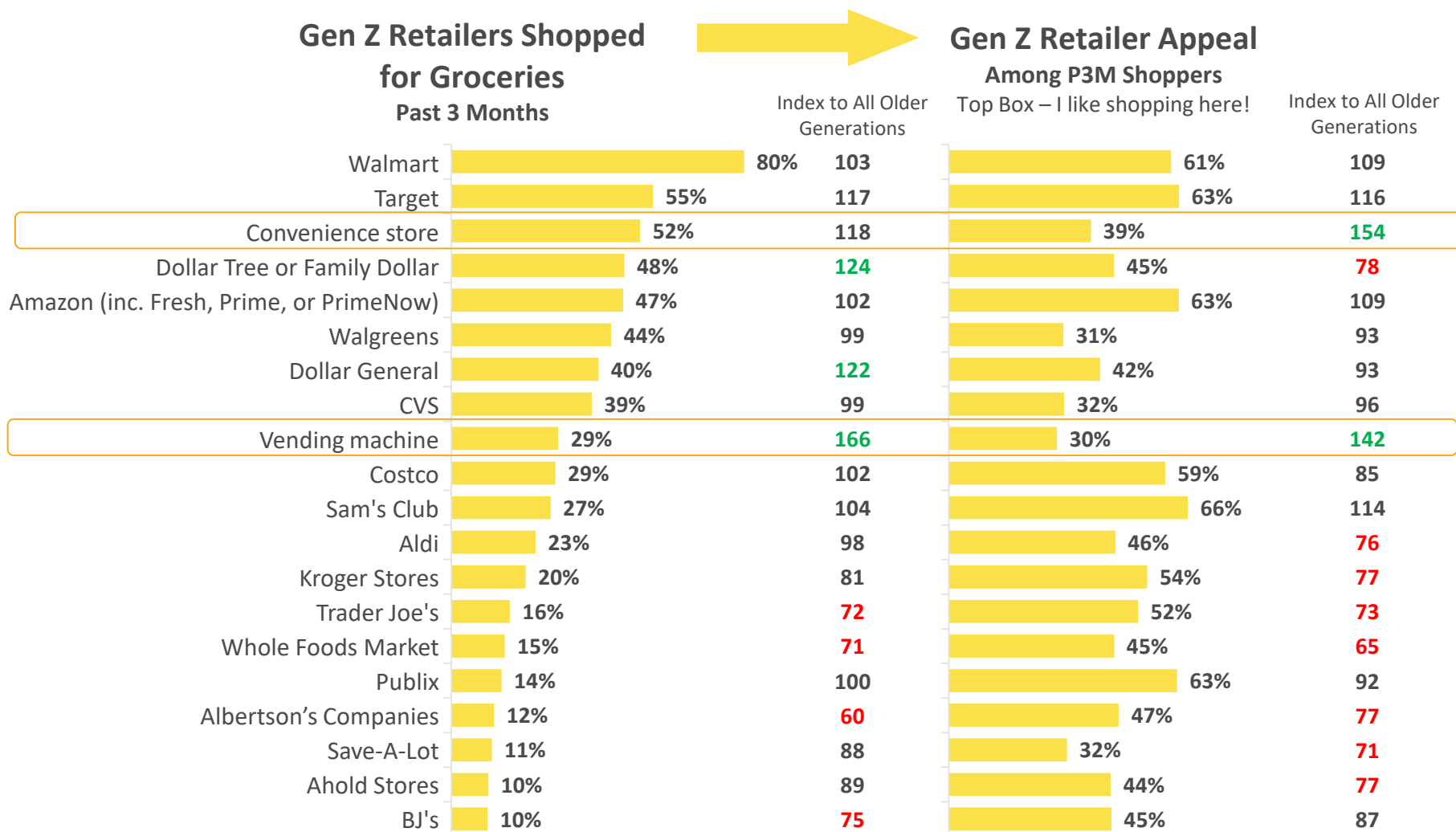


Gen Z's Most Purchased Categories

Middle School vs High School

Food		Beverage	
Sweets	58%/52%	Regular soda	56%/46%
Salty snacks	56%/49%	Bottled water	49%/38%
Ice cream/frozen treats	40%/45%	Sports drinks	40%/30%
Cereal	40%/39%	Juice	39%/35%

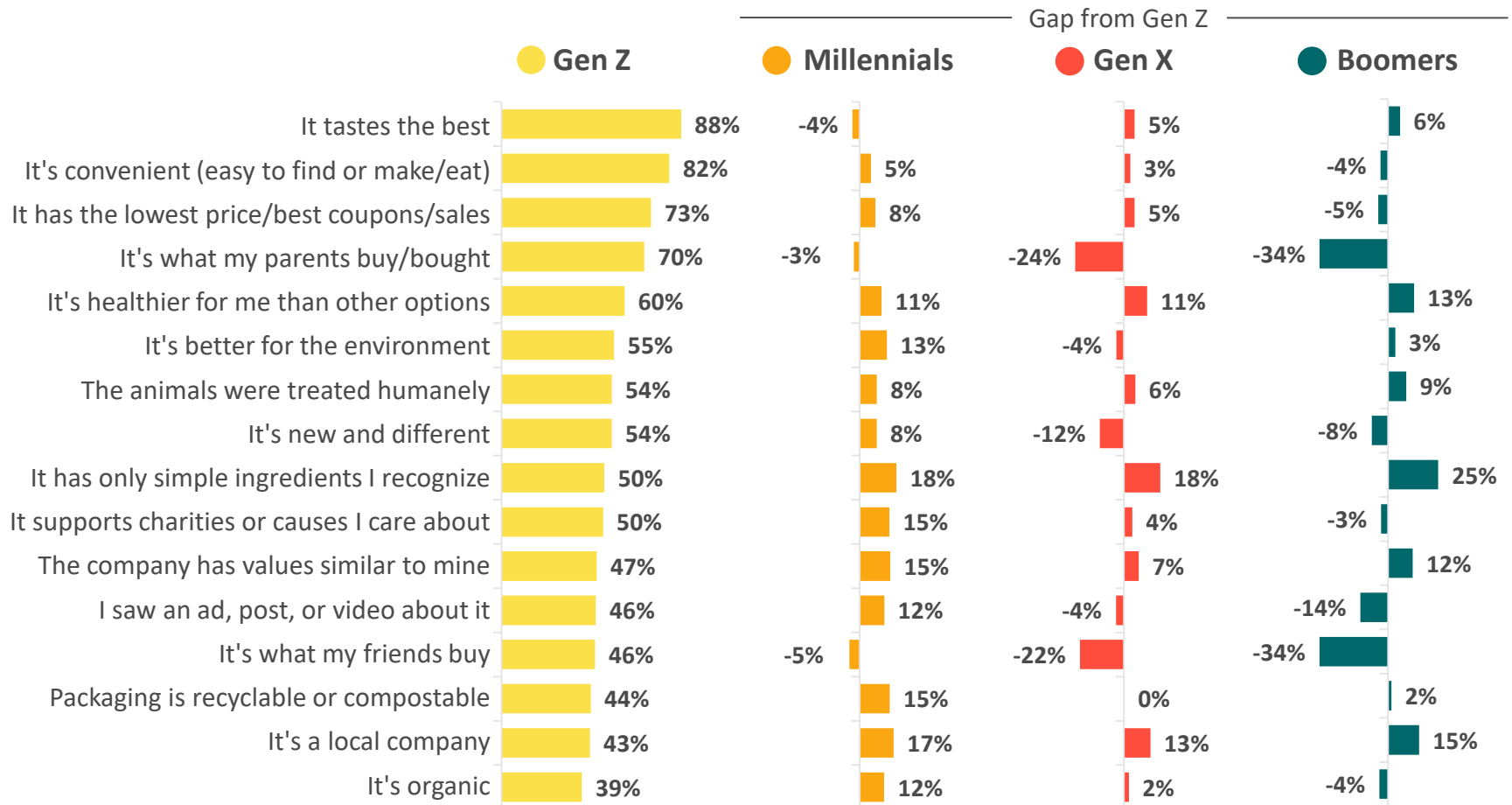
Gen Z most enjoy shopping at familiar one-stop shops (including Amazon); they enjoy shopping traditional grocery less relative to older consumers



Gen Z have less pronounced purchase criteria than older shoppers, likely due to less shopping experience, and they rely on friends' and family's examples more

Food and Beverage Purchase Criteria by Generation

Yes, this makes me more likely to buy something

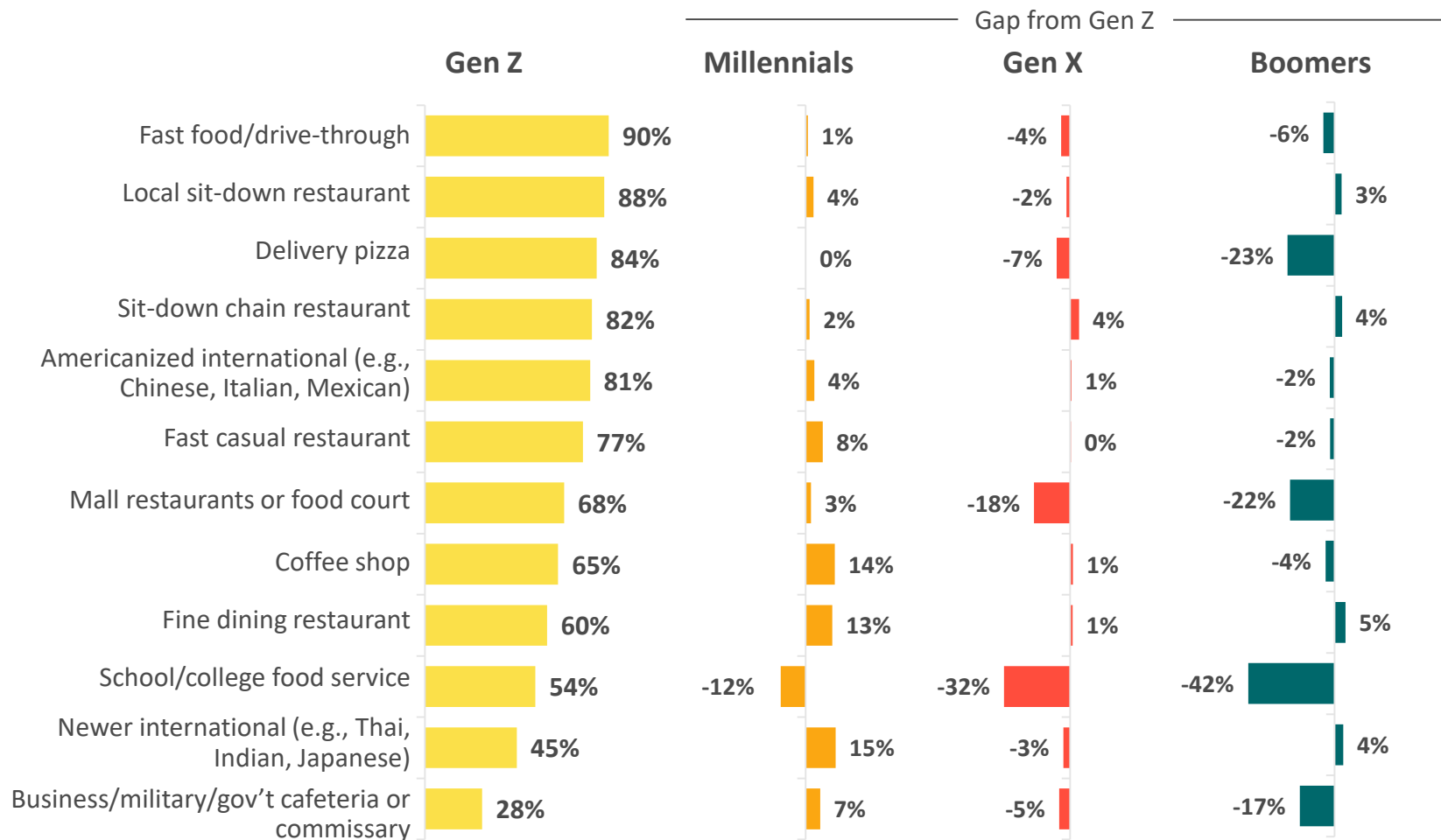


Much like all cohorts, Gen Z frequents a variety of food service venues to meet different needs

Restaurant Visitation

by Generation

Eat here all the time/sometimes



Key Takeaways

Gen Z are driven by a sense of fairness and decency in their social values, constantly connected to the news of the day, but they lack certainty about what the future holds for them as adults.

Today's teens are likely the most educated cohort the U.S. has seen when it comes to diet, health, and wellness. As they mature, we should expect them to become savvy, sophisticated wellness consumers.

However, given their practical, frugal tendencies, what they are willing to pay for is still an open question.

Healthy, tasty, and easy-to-make will be key priorities for teens as they gain more responsibility for taking care of themselves within the limitations in time, skill, motivation, and funds of their still relatively young age.

Gen Z's reliance on their phones means mobile compatibility is obviously essential. But more importantly, food content needs to meet teens where they are in terms of skills, equipment required, and the food they're looking for.

As Gen Z begin to take more responsibility for feeding themselves, they'll also expand their retail and restaurant repertoire as they begin to appreciate the trade-offs between dimensions such as value, convenience, experience and enjoyment.



ABOUT THE HARTMAN GROUP

The Hartman Group is the premier food and beverage consultancy in the world. Companies and brands across all segments of the food and beverage industry benefit from our unparalleled depth of knowledge on consumers, culture, trends and demand-side market strategy. We listen closely to understand our clients business challenges and tailor solutions that deliver transformative results. Through a unique suite of integrated custom, primary research capabilities, market analytics, and business strategy services, we uncover opportunity spaces and avenues for growth. We deliver more compelling insights that fuel inspiration and ideas for innovation.

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