

Methodology - Quantitative

OBJECTIVES

To better understand the Gen Z consumer and parents of Gen Alpha by understanding:

- What is important in terms of beliefs and values
- Different food rituals and routines
- Attitudes towards food, both in terms of preparation and eating out
- The impact of technology on food marketing and communication

Other Hartman Group reports sourced:

Brand Ambition: Food and Beverage Private Brands & Beyond 2021

Food Sourcing in America 2022

Food and Technology 2023

Sustainability 2023, Making Things Personal

Culture of Food, 2015

Millennials 2011

- When comparing with the Millennials study and Culture of Food, generational comparisons made between Millennials age 16-26/20-26 and current Gen Z age 16-26/20-26 respectively.

QUANTITATIVE METHODOLOGY

- An online survey fielded Oct 18-Nov 2, 2023
- U.S. respondents 13-77 yo (years old) n=1,959 (Margin of Error (MOE) $\pm 2.2\%$ at 95% confidence level)
 - Gen Z 13-26 yo (n=784 MOE $\pm 3.5\%$), Millennials 27-42 yo (n= 453 MOE $\pm 4.6\%$), Gen X 43-58 yo (n= 382 MOE $\pm 5.0\%$), Boomers 59-77 yo (n=304 MOE $\pm 5.6\%$)
 - Gen Z 13-17 yo (n=266 MOE $\pm 6.0\%$), 18-22 yo (n=277 MOE $\pm 5.9\%$), 23-26 yo (n=241 MOE $\pm 6.3\%$)
 - Parents of children
 - Parents of Gen Alpha 0-5 yo (n=213 MOE $\pm 6.7\%$), parents of Gen Alpha 6-12 yo (n=224 MOE $\pm 6.6\%$), parents of Gen Z 13-17 yo (n=120 MOE $\pm 9.0\%$)

Respondents recruited based on age-based quotas and balanced to match the 2023 Census Bureau Current Population Survey by gender, region, income, household structure, and ethnicity within 13-26 yo and 27-77 yo. The total sample was balanced by age of children and parents.

READING THE CHARTS

- Gen Z
- Millennials
- Gen X
- Boomers
- Gen Z 13-17 yo
- ▲ Gen Z 18-22 yo
- Gen Z 23-26 yo
- Parents of young Alpha 0-5 yo
- ▲ Parents of older Alpha 6-12 yo
- Parents of Gen Z 13-17 yo

Shapes used when indexing

Capital letters (A, B, C, D) indicate a statistically significant difference from the indicated groups at the 95% confidence level.

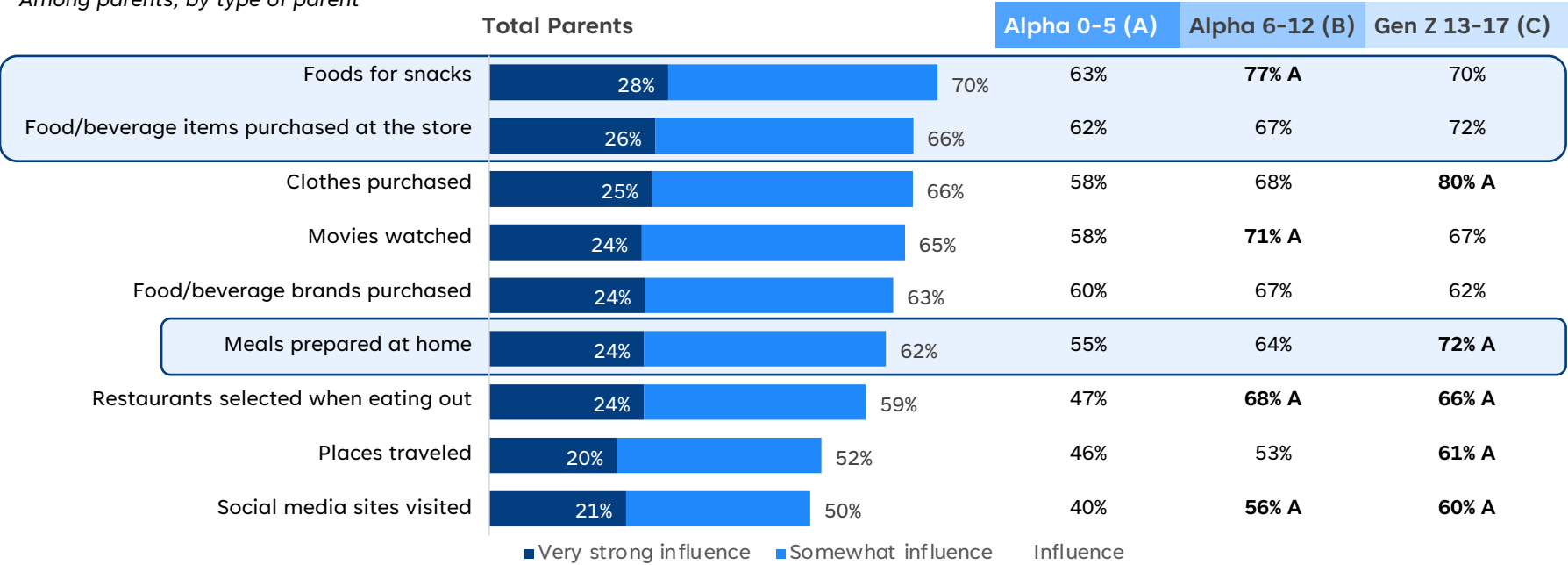
Indexing for Gen Z ages is indexed to total Gen Z

Food is where children first start asserting their independence

Children eat what they like and ignore what they don't like. While we know taste preferences evolve over time, parents use taste as a starting point as they try and guide their children's eating habits. Since meals are where parents feel they have the most control over nutrition, parents first give their children some control over snacks. As children age, they have more impact on the meals prepared at home, with some older children influencing some of the foods that families eat.

Areas where children are allowed to make decisions

Among parents, by type of parent



Source: Gen Z/Alpha P3. When it comes to decision making authority, how much does your <age> <boy, girl, child> influence each of the following? Base: Parents n=557, Alpha parents 0-5 yo n=213, Alpha parents 6-12 yo n=224, Gen Z parents 13-17 yo n=120; Capital letters (A, B, C) indicate a statistically significant difference from the indicated groups at the 95% confidence level.

“They are not so independent because I'm the one making the meals, but they have some independence choosing their snacks. Sometimes if they come grocery shopping along with me, then I give themselves some independence to choose the cereal and maybe some snack items.

- Anitha, parent of children 12 & 7 yo



Respondent-provided image

Who is Generation Z?

Generation Z, often referred to as Gen Z, is defined by their adaptability as "Digital Natives" in a tech-driven world. **This generation of consumers straddle different life stages with some still in middle and high school, and others out of college and in the workforce.** They are socially active and globally connected, using digital platforms to build relationships and drive positive change. Empathy, inclusivity, and a commitment to diversity are central to their values.

Older Gen Z face economic challenges and uncertainties, such as student debt, affordable housing and evolving job markets, which influence their financial outlook. Despite these challenges, **they seek success while also emphasizing well-being and work/school-life balance.** This generation is making a significant impact on the world with their values, adaptability, and commitment to positive change.



GEN Z LIFESTAGE

Middle
School



13 to 26 yo



In the
Workforce

Social media, eating out, and personal recommendations are central influences on Gen Z's food selection

Although restaurants play a major role in influencing taste preferences for consumers of all generations, it is social media that distinguishes Gen Z, as well as Millennials, from older generations. Digital platforms are a part of Gen Z's culinary landscape, and the platform's influence is balanced with Gen Z's desire for genuine content. YouTube cooking channels, Instagram food bloggers, along with specialized food groups on social platforms, contribute to the social aspect of food discovery, reinforcing the importance of shared experiences and recommendations among Gen Z.

Top Influencers on food and beverage preferences

Among total, by generation, 25% or more ranked by percent selecting

Total Gen Z 13-26	Millennial 27-42	Gen X 43-58	Boomer 59-77
Restaurants/Eating out	Restaurants/Eating out	Restaurants/Eating out	Restaurants/Eating out
Parents/grandparents	Spouse/significant other	Spouse/significant other	Spouse/significant other
Friends	Friends	Cooking shows	My ethnic culture/heritage
Social media	Recipe sites/apps (e.g., Allrecipes, Epicurious)	Recipe sites/apps (e.g., Allrecipes, Epicurious)	Recipe sites/apps (e.g., Allrecipes, Epicurious)
Siblings, cousins	Cooking shows	My ethnic culture/heritage	Friends
Social media influencers/ Youtubers	Social media	Friends	
	Parents/grandparents		

Source: Gen Z/Alpha FB6. Which of the following has the greatest INFLUENCE on your food and beverage preferences? (Select all that apply.) Base: Gen Z n=815, Millennials n=457, Gen X n=382, Boomers n=305; T1. How much do you agree or disagree with each of the following statements? Somewhat/strongly agree Base: Gen Z n=815; *Numbers are rounded so 24.5% and above is shown; Color and bolding shown for emphasis only.

I honestly randomly started gaining inspiration from the people on social media. It may have been about a year ago. I out of the blue started getting pictures and videos of people on Instagram with food.

– Marissa, 19



63%

of Gen Z believe social media is great to learn about new food and beverage products

Gen Z consumers are reshaping retail with a strong inclination towards online shopping, ethical consumption, and influencer-guided decisions

Gen Z, as digital natives, are readily accepting of online shopping, utilizing e-commerce platforms and mobile apps for the sake of convenience. They conduct online research, delving into product reviews and seeking guidance from social media influencers. Their choices are notably influenced by user-friendly digital shopping experiences and mobile payment options. Additionally, Gen Z's shopping behavior reflects their value-conscious nature, driven by economic uncertainty, as they prioritize affordability and ethical consumption.

They favor brands aligned with sustainability, fair labor practices, and inclusivity. Furthermore, social media, especially Instagram and TikTok, plays a pivotal role, influencing their purchasing decisions through peer recommendations and user-generated content. This "see now, buy now" culture on social media encourages impulse purchases and trend-driven choices.

68%

shop online for some of
their groceries

(vs. 52% for Gen X and 39% for Boomers)

16%

buy at least half of their
groceries online

(vs. 11% for Gen X and 9% for Boomers)

Source: Gen Z/Alpha F8. In the past 3 months, approximately what PORTION of your [household's] grocery purchases (food, beverage or other grocery) were made ONLINE? Base: Gen Z n=815, Gen X n=382, Boomers n=305.



Most consumers want to trust companies to stand by their word, but will consider boycotting if they don't believe in their values

Trust is a tricky word and most consumers, including Gen Z, want to trust companies to stand by their word. However, there are skeptics and companies should work to gain trust and build loyalty. When consumers find brands they like, they tend to stick with them. While they will try new brands, they will quickly switch if they don't like it or don't trust it.

I've found a formula that works for me and when it comes to supplements, I always stick with it... one, it's consistent, two, I know they work, and three, they prove themselves to me time and time again, so that trust factor is there.

- Nick, 24

Authenticity plays a key role in building trust. Boycott is a strong action, yet over half of Gen Z consumers say they are willing to boycott brands that they don't feel are doing the right thing for society or the environment, a form of trust.

