

# FOODWAYS OF THE YOUNGER GENERATIONS: MILLENNIALS & GEN Z

An investigation into the complexity of the different Millennial life stages that impact how this generation lives their lives and chooses what to eat and drink each day.

## STUDY FOCUS: MILLENNIALS IN FOOD CULTURE

The Millennial generation has been a topic of two prior reports from The Hartman Group. In 2011 and 2014 we covered broad areas of this generation's lifestyles, values and preferences, including the extensive integration of technology into their daily lives, their leisure pursuits, their politics and how they navigate through today's marketplace in a variety of categories.

For the **Foodways of the Younger Generations** report we narrowed our focus to Millennials' interaction with food and beverages — what they eat, where they eat and how they shop for groceries and cook when they decide to stay at home. We compare the Millennials to the generations that came before them (Gen X and the Boomers) on these food culture topics.

In addition, to accurately assess what is happening with this Millennial generation that today spans the ages of 19 through 37, we needed to investigate the complexity of their different life stages. These life stages impact how Millennials live their lives and choose what they will eat and drink day to day.

Across the life stage subgroups, we uncovered a segment of Millennials who are what we have called the Food Sophisticates. We explore these Millennials who seek unique and interesting food & beverage experiences. They are the trendsetters of their generation, sharing their recipes, daily diets and dining-out experiences with their social networks.

**Foodways of the Younger Generations** also provides a look at the oldest of the upcoming generation — Gen Z — those 15 to 18 years of age consumers. They are an important generation to watch emerge because they are even more 'wired' to their handheld technology and even more diverse than the Millennials.

**Special reduced rate: \$12,500 if ordered before April 30, 2016.**  
After April 30, 2016: \$15,000



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*Millennials and Gen Z*

## ABOUT THE REPORT

### METHODOLOGY

**Quantitative online survey:** Nationally representative online survey of 1,705 U.S. adults (aged 15 to 70) was fielded in February 2016.

The data was analyzed across the four main generations:

- Gen Z (answered a subset of the survey)
- Millennials
- Gen X
- Boomers

Millennials were broken down into three subgroups:

- Millennials still at home/in dorms
- Millennials on their own with no children
- Millennials with children

### Qualitative:

Qualitative techniques included small group, in-home interviews in the greater Seattle metro area. Virtual interviews via Skype in California, Illinois, Massachusetts and Tennessee.

Prior to interviews, respondents completed homework assignment of collages depicting what they considered to be healthy and unhealthy in their diets.

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# FOODWAYS OF THE YOUNGER GENERATIONS: MILLENNIALS & GEN Z

A NATIONALLY SYNDICATED REPORT BY THE HARTMAN GROUP



## INTRODUCTION — WHO ARE THE MILLENNIALS?

Move over, Boomers; the Millennials have just surpassed you in population size, checking in at a robust 83.1 million and representing one-quarter of the U.S. population. According to the latest U.S. Census report, they have officially knocked the Boomers, at 75.4 million, off their long-held perch to claim an influential spot as arbiters of food culture.

No doubt, the Millennials are crafting their own food culture. They began with a foundation of childhood habits learned from their parents, then received unprecedented exposure to the philosophies of healthy diets throughout their years in school, and now they have started breaking out into their own conversations and discoveries about food through their social networks and popular media channels.

As a wired and connected generation, they have virtually unlimited access to information and idea sharing — literally at their fingertips. This connected lifestyle affords them instant exploration and immediate exposure to new ideas as they form their own habits and preferences.

While Internet usage is high among all generations, for the younger age groups it has become almost constant, with the use of mobile phones and tablets. This constant connection allows instant access to information on any topic and the ability to seamlessly stay in touch with social and professional networks — and even parents.

The Millennials and Gen Z are the most ethnically diverse, which affords them the opportunity to incorporate eating habits from across many different cultures. This diversity will continue to drive food culture trends around the exploration of authentic, global food experiences.

This tacit cultural knowledge influences their dining habits and their food choices, and it allows them to confidently face the vast array of ingredient options available today at even the most basic grocery outlets.

## EXECUTIVE SUMMARY — EXCERPT

The Millennial cohort began their food journey as most do, learning eating habits from their parents and extended families. However, unlike prior generations, as they were growing up, they received unprecedented exposure to and knowledge about (through the media, government, academic institutions and friends) healthy diets and global cuisine. Now, as they age, they are having their own conversations and discoveries about food via friends, family, their broader social networks and a variety of popular media channels, especially online social media.



## FOODWAYS OF THE YOUNGER GENERATIONS: *Millennials and Gen Z*

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#### Report length:

Total of 90 pages in PowerPoint and PDF format, including executive summary and recommendations. A standard set of demographic data tables (Excel format)

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As this generation continues to transition from the parental home to the college dorm and eventually on to their own home, each life-stage shift has an influence on their food preferences, their perceptions about health, how they grocery shop, approaches to cooking, good and bad snacking habits, and their food service choices.

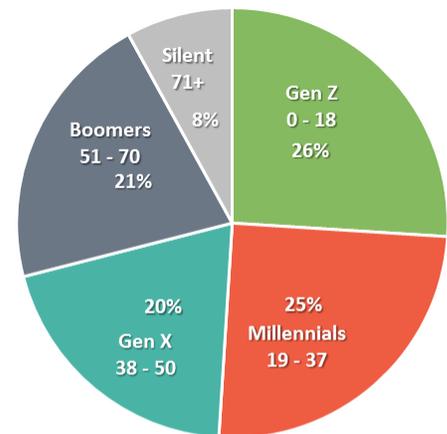
An interesting subset of Millennials are the Millennial Food Sophisticates. They are a trendsetting, influential minority (25%). Compared to most Millennials, Sophisticates are more likely to live on their own; about half are urban dwellers and half have at least a college degree and work full-time. This Millennial niche brings a heightened awareness and stylistic approach to food culture that will influence both the generations that came before them and the one following them. Blogs these Food Sophisticates write, photos of food they order at trendy restaurants posted to social media, and recipes and prep videos they share have substantial impact on their own wide social networks and beyond.

The upcoming generation, Gen Z, will be coming of age in the next decade. For the most part, the teen members of Gen Z are still in high school and living at home. Hard to believe, but they are more 'wired' to their handheld technology and even more ethnically diverse than the Millennials.

## Health Perceptions and Food Preferences

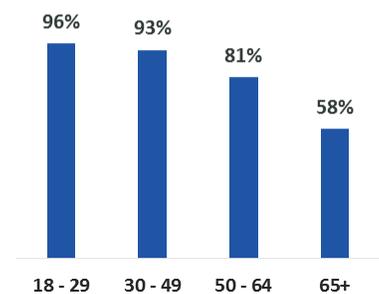
- Millennials tend to look like older cohorts (Gen X, Boomers) when it comes to health & wellness. Those who have ventured out on their own are more interested in developing healthy eating and exercise habits and in looking for healthy, less processed food. A key exception are those still living at home — these younger Millennials are more similar to Gen Z and are less concerned with how diet impacts their health.
- They can tell the “good” food from the “bad” food. This group has been well-schooled in healthy eating habits. They have an amazing amount of information at their fingertips; they continue to grow their knowledge through friends and a variety of media channels.
- Like the older cohorts, the Millennials who have ventured out on their own are focusing on foods that are minimally processed, organic, with simple and recognizable ingredients.
- Others, especially those still at home, don't always “walk the talk,” often seeking convenience and indulgent treats, similar to Gen Z teens.
- Millennials (as well as the older generations) believe they eat better than their parents. They believe their choices are healthier, less processed and more natural.
- Millennials without children are the most interested in global cuisines. Millennials with children live scattered, busy, chaotic lives and are often just trying to get a decent meal on the table. Parents' daily reality of family life and picky eaters makes it harder to be culinary explorers and also gets in the way of healthy eating.

Size of the Generations



Source: US Census, July 2015

Internet Usage By Age



Source: Pew Research Center, 2015

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**THE MILLENNIAL FOOD SOPHISTICATES:** This group specifically looks for foods that are minimally processed (66%) and more natural or organic (65%). As a result, even more of them believe (63%) that they are eating more healthfully than their parents compared to the rest of the Millennials (40%).

**GEN Z Teens:** Like Millennials who still live at home, teens actually know what healthy means when it comes to eating, but they don't care as much as others; they think they have plenty of time to eat right in the future.

## Shopping

- Millennials don't pay that much attention to nutrition labels, compared to older generations. They are less interested in reading the labels even though they talk about watching sugar and salt intake. Packaging cues of freshness and callouts in the front of the package often suffice to communicate what to choose as they hurry along in their shopping trips.
- They like a brand story, but it doesn't make them brand loyal. Price often trumps a good narrative or social cause.
- "As-good-as" store brands have wide appeal, especially to Millennials on their own (60%).
- However, brand loyalty begins to surface a little more when kids enter the picture — brands that serve the purpose of shortcut communication of known quality and, importantly, what their children ask for and will eat.
- Price and proximity drive grocery store loyalty as they do for the older generations. Millennials are price conscious. Convenience is a key driver as they lead their busy lives.
- They don't buy a lot of stock-up items; they are more focused on getting what they need when they need it. They tend to purchase items that reflect their need for quick and on-the-go solutions.
- They believe in shopping local. They want to support their local community and local workers through their choice of products and services.
- Digital. Digital. Digital. They lead the charge on everything online — shopping, coupons, product research, recipe lists, etc.

**THE MILLENNIAL FOOD SOPHISTICATES:** This group exhibits more loyalty to stores that offer specialty foods, ethnic foods and local options.

**GEN Z TEENS:** Parents still buy the majority of their food, although they sometimes spend their allowance on snacks. In lieu of what parents supply, anything at a friend's house (or even at school) is fair game.

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## QUALITATIVE METHODOLOGY

Small group in-home interviews in the greater Seattle metro area. Virtual interviews via Skype in: California, Illinois, Massachusetts and Tennessee.

Prior to interviews, participants completed a homework assignment of collages depicting what they considered to be healthy and unhealthy in their diets. Participants included:

- Mix of male/female
- Age range:
  - »17–18 for Gen Z
  - »19–37 for Millennials
- Millennials still at home with parents
- Millennials at college, living in student housing
- Millennials on their own without any children
- Millennials with children