FSA | Generation Z

Executive Summary | 7th February 2020

Background and objectives

Since the FSA was established two decades ago, the food system has grown increasingly complex. There have also been shifts in the ways people access and share information about food, the way they group themselves, and in their trust and expectations of Government.

Against this backdrop, the FSA commissioned BritainThinks to conduct research to improve understanding of Generation Z (broadly 16-25-year olds) and their attitudes towards food and the food system, so as to provide a robust evidence base to inform strategic planning, policy and communications. The research programme set out to explore:

1. Generation Z (Gen Z)'s engagement with food and the food system
2. How they make decisions about food, and how they communicate about food
3. Gen Z's attitudes toward the food system, including future aspirations
4. Generational differences between Gen Z and older generations, and between previous generations of young people
5. Sub-group differences within the 16-25-year-old age group

This project formed part of FSA's Strategic Evidence Programme, which addresses the FSA's cross-cutting and longer-term evidence needs.

Methodology

The diagram below outlines the methodology for this project.

Stage 1: Rapid Evidence Assessment

- Covering existing academic literature on Generation Z and food
- Reviewed 112 sources:
    - 37 peer reviewed academic studies, 62 commercial marketing reports, and 13 think tank reports
- REA findings detailed in full in a separate report

- Debriefed the REA findings and agree themes for primary research at an internal workshop

Stage 2: Understanding the audience:

- Fieldwork dates: 10th September to 12th November 2019
- 40x 16-25-year olds recruited across London, Cardiff, Belfast and Colne
    - Spread of age, gender, socioeconomic grade (SEG), location
- Online community (split over two phases)
    - Two weeks in total
- Deliberative focus groups (split over 2 phases, 8 groups per phase)
    - 16 x 90-minute focus groups in total
    - Split by age (16-19, 20-25) and SEG (ABC1, C2DE)
- Filmed ethnographic interviews
    - 5 participants selected for 3 hour filmed interviews

Stage 3: Quantifying the results

- Fieldwork dates: 20th November to 6th December 2019
- Nationally representative poll with boosted sample of 16-25-year olds
    - Sample of 2,475 with total sample of 619 x 16-25-year olds
    - 16-25 sample and 26+ sample were weighted to their specific age-group for gender, age and region
    - Weights for all other demographic factors (including social grade, housing tenure, and working status) were applied to the whole sample at the total level (16+ UK)

Key Findings

Findings from the REA:

While there is a lot of 'hype' surrounding Gen Z, robust research and evidence to support claims is relatively thin on the ground.

- There are very few peer reviewed studies about this generation, and little attention is paid to the extent to which findings about Gen Z are cohort effects, period effects or life-stage effects.

However, there are some clear trends in what defines this generation. Notably, Gen Z's engagement with social media and values around social issues and the environment are perceived to set them apart from older age groups.

- Gen Z are often defined as the first true 'digital natives'. Social media is central to their lives and is also something they see as distinct to their generation compared to older age groups.
- In addition, Gen Z think of themselves as having a strong sense of social responsibility and being environmentally conscious, though it is unclear how far these views translate into behaviour.

Gen Z report high levels of concern and pessimism about the future they face. This tends to be related to political instability, climate change and the rising cost of living.

Gen Z are at a time in their lives where their preferences and behaviours are still in flux.

- As young people, they are open-minded, and often don't have strong views - they are still deciding what they believe in.
- Whether they are at school, at university or in full-time employment – has an enormous impact on independence, confidence and control over their food choices.

When it comes to food, Gen Z behaviour is strongly driven by price. However, this is likely to be a life stage effect.

- Price emerged consistently as a key factor influencing food choices among Gen Z.

    - Gen Z are more likely than older generations to say price is a key factor influencing their food choices, with 58% of those aged 16-25 placing price in their top 3 factors that influence food decisions, compared to 43% of those aged 26+.

- This is most likely a life stage effect, with price becoming less of a concern as people get older, as the importance of price to food decisions decreases gradually by age.

Evidence about whether Gen Z are making values-driven food choices is mixed. While Gen Z think of themselves as being environmentally-minded and ethically-informed, this does not always appear to be a strong influence on their consumption behaviours.

- Gen Z care more about the environment and are changing their eating behaviours as a result. However, while is some evidence to suggest this is happening in practice, it appears to be on a relatively small scale.
    - Gen Z are more likely than those aged 26+ to say they are reducing or are thinking about reducing their meat consumption (37% vs. 24%), and they are more likely to be vegetarian or vegan compared to those who are aged 26+ (10% vs. 5%).
    - Gen Z are also more likely than other age groups to say they are choosing a vegetarian or vegan diet for environmental reasons: 68% of Gen Z who are actively trying or considering reducing their meat and/or fish consumption say the environment is their top reason for doing so compared to 57% of those aged 26+.
    - However, Gen Z are less likely than those aged 26+ to be buying locally produced food (65% vs. 77%) and food with less plastic packaging (79% vs. 87%).

Gen Z see themselves as caring more about animal welfare than other age groups, however this concern doesn't seem to be translating into behaviour.

- Almost two-thirds (63%) of Gen Z think that Gen Z are 'more likely than the general public as a whole to be concerned about animal welfare', compared to 51% of those aged 26+.
- However, Gen Z are less likely to be buying food that has been produced to high animal welfare standards than other age groups.
    - 70% of Gen Z say they buy food that has been produced to high animal welfare standards compared to 79% of those aged 26+.

The data suggests that Gen Z are a health-conscious generation. However, they tend to eat less healthy food than older age groups, highlighting a tension between life stage and aspirations.

- In the quantitative research, Gen Z are more likely than Millennials to say they prioritise nutritional content and are one of the age groups most likely to be using fitness apps (24% vs. 17%). In the qualitative research, participants often said healthy eating was important and an aspiration for the future when they think of food.
- However, FSA 'Food and You' data indicates that 16-24 year olds are the least likely to say they eat fruit and vegetables and the most likely to say they eat pre-packaged meals, ready meals and burgers.

As a cohort, Gen Z have low awareness and understanding of food system issues, and the knowledge they do have tends to be patchy.

- As with consumers in general, Gen Z are rarely thinking about the system behind food production and often described taking the system of production and processing for granted.
- They are mostly likely to have engaged with individual, 'trending' issues (including animal welfare, plastic, health and hygiene) via social media, rather than the food system as a whole.

Gen Z are less likely to be worried about food safety and hygiene and about importing food from abroad compared to older age groups.

- 26% of Gen Z place 'food being produced in a safe and hygienic way' in their top 3 issues facing the food system compared to 39% of those aged 26+.
- 13% of Gen Z place 'food travelling long distances to reach consumers' in their top 3 issues compared to 19% of those aged 26+.
- Qualitatively, participants showed a high level of spontaneous trust in the food system regulation. They also do not see the importing of food as an issue, beyond some concern about the environmental impact.

There is some indication Gen Z are more likely to care about the environmental impact of food than other age groups.

- 46% of those aged 16-25 select the environmental impact of food production as a top issue facing the system, compared to 37% of those aged 26+.
- However, the qualitative research, most said they had never thought about climate change in the context of the food system before, and were very interested to learn about the environmental impact of food production.

Priorities for the future

Ultimately, Gen Z want a future food system that requires minimal changes to current eating behaviours and patterns, but that is also sustainable and minimises environmental and health-related risks

- As Gen Z learn more about the food system, they most prioritise sustainable and environmentally friendly food production, affordability of and access to healthy food, education for consumers to make informed choices, and continued convenience and choice.

Gen Z believe that technology will play an important role in responding to the problems currently facing the food system.

- Gen Z identify technology as key to addressing future food system challenges, although existing levels of knowledge and awareness of specific food technologies is generally low.
- When prompted with future scenarios, participants felt the scenario that relies on technological solutions felt most plausible and sensible. In contrast, a return to more localised food production felt unrealistic and unable to deliver the convenience and choice Gen Z want to maintain.
- Gen Z are distrustful of and highly negative about the power of large corporations in the food system and feel this is a real risk in future food system.

Among Gen Z there is a sense that consumer have limited power to change to the food system. As such, they want to see the Government take greater responsibility for driving positive change.

- As well as increasing awareness and education around the issue, Gen Z want to see government setting stricter standards and increasing regulation to curb the power of large corporations.