



Winning Over Gen Z

December 10th, 2024

Agenda for Today's Presentation

1

What Gen Z Wants & Why

2

Attitudes Towards Food & Cooking

3

Gen Z Perceptions of Dairy

4

Recommendations

The Gen Z Food Consumer - Midwest Dairy

Opportunity won't wait for Gen Z to age up; meeting their demands and acting as a partner in their culinary coming of age is fruitful now, and into the future.



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Associate Director, US Research - Food and Drink

November 2024

What Gen Z wants & why

The same things most consumers want

Gen Z is looking for brands they can trust to deliver quality, ease and value in the home, and good service away from the home. Bringing elements of playfulness and fun can differentiate, as does an air of ease and casualness that has become a hallmark of the generation.

Help easing into adulthood

Adults have a slightly different take on food, as their life stage puts a finer point on some attitudes (eg the importance of cooking) and dulls others (eg the need for attractive packaging). Products that can age with the transition, like learning to cook and growing into nutritional knowledge, have longevity through purpose.

Dairy can be a partner in nutritional knowledge

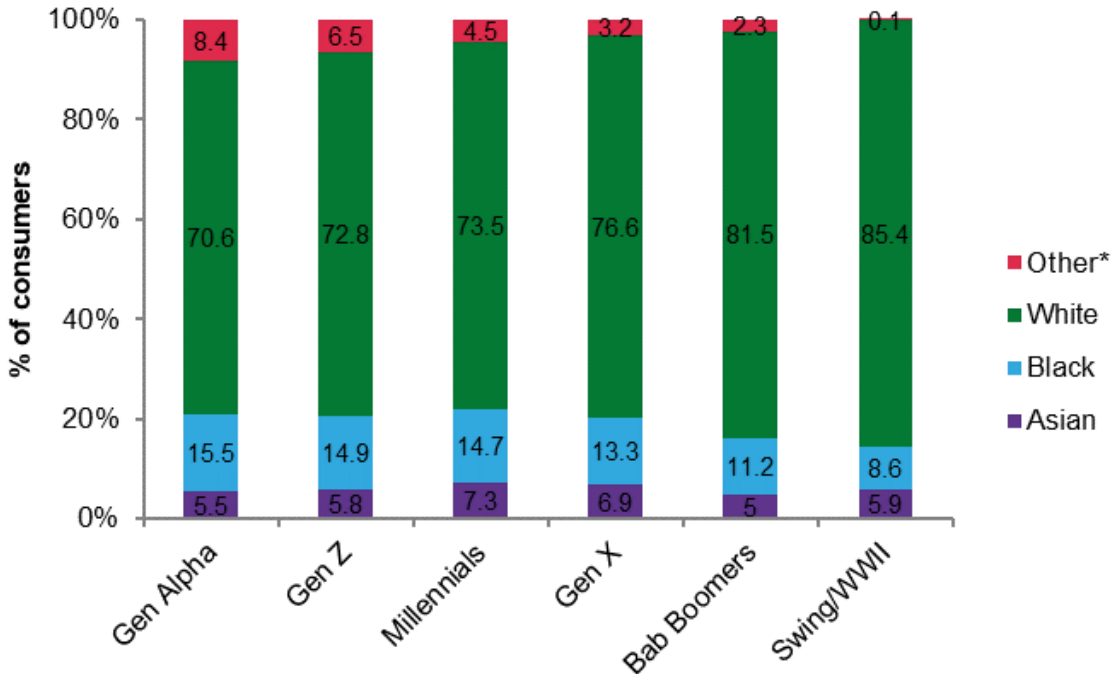
Gen Z is learning how to cook, but they're also learning how to feed themselves (and sometimes others). Offering support related to balanced meals can help dairy earn a place in their fridge. Protein is certainly a main "in," but other nutrients, vitamins and minerals matters, too.

Gen Z: A little context

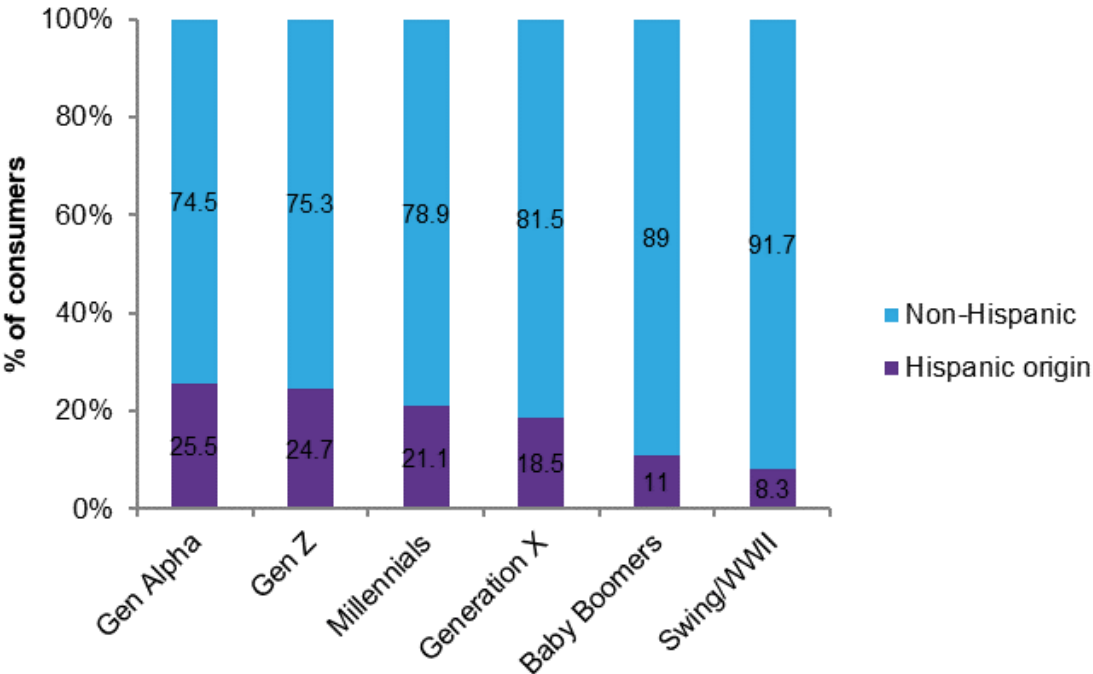
Driven by an increase in multiracial identities, Gen Z is the most ethnically diverse generation of adults

CPG and foodservice alike will need to consider how to contribute to a food landscape as diverse as Gen Z, either by offering variety or drilling down into niche flavors

US: generations, by race, 2024



US: generations by Hispanic origin, 2024

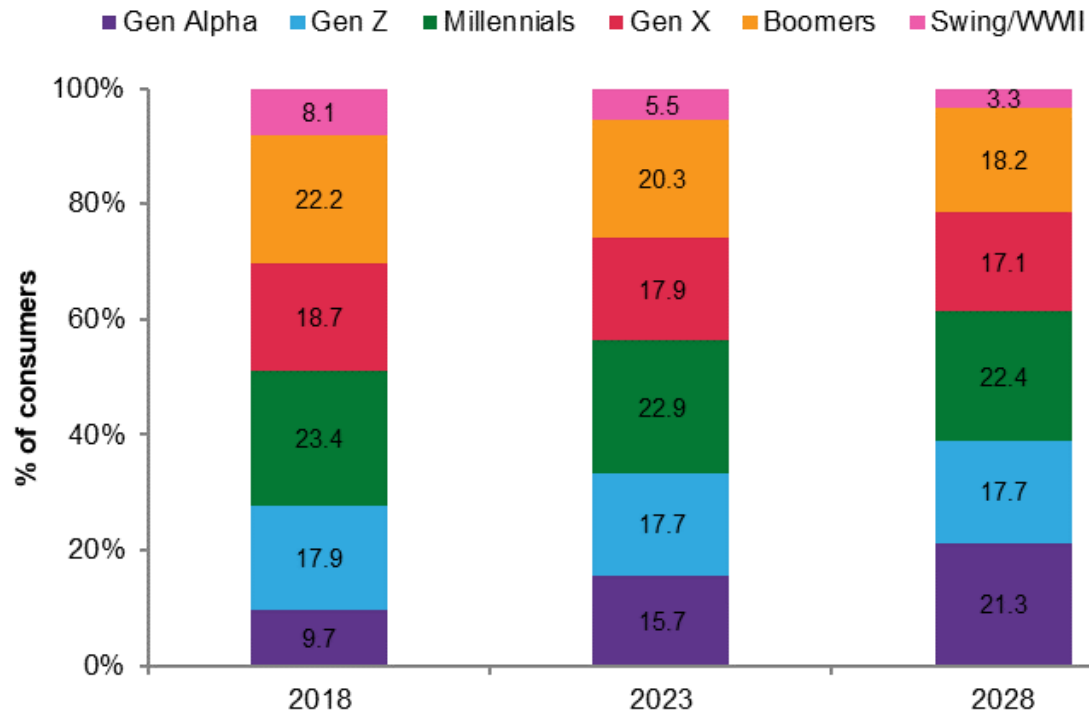


*Includes American Indian/Alaska native, native Hawaiian/other Pacific Islander and two or more races



Gen Z's independence will continue to be apparent in their food choices

US: population distribution and prediction, by generation, 2018-28



Gen Z accounts for 17.7% of the US population, making it significantly smaller than the current largest generation - Millennials.

It is a mistake, however, to underestimate their power: 72% of adults and 55% of teens [chose most or all of the restaurants](#) they visited in the last three months, and [almost all are buying food](#). With families shrinking in size, individual preferences for food, at and away from home, will matter more for this generation, as will the quality of an overall experience.

Gen Z won't settle when it comes to food experiences

Gen Z is looking for food, at home and away, to live up to the expectations they're setting across goods and services. Mintel Trend *Experience is All* outlines how, increasingly, we are living in a hyper-connected world, but consumers still crave in-person experiences. These in-person experiences are increasingly held to a high standard, with consumers wanting more than what might immediately come to mind from a purchase.

CPG foods can lean in with international flavors, unique textures and extra bold flavors (think spicy, sour), while foodservice can facilitate personal relationships and bonding while offering food that fits in well with socializing, like tapas, appetizers and fun beverages.



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Read on [mintel.com](https://www.mintel.com)

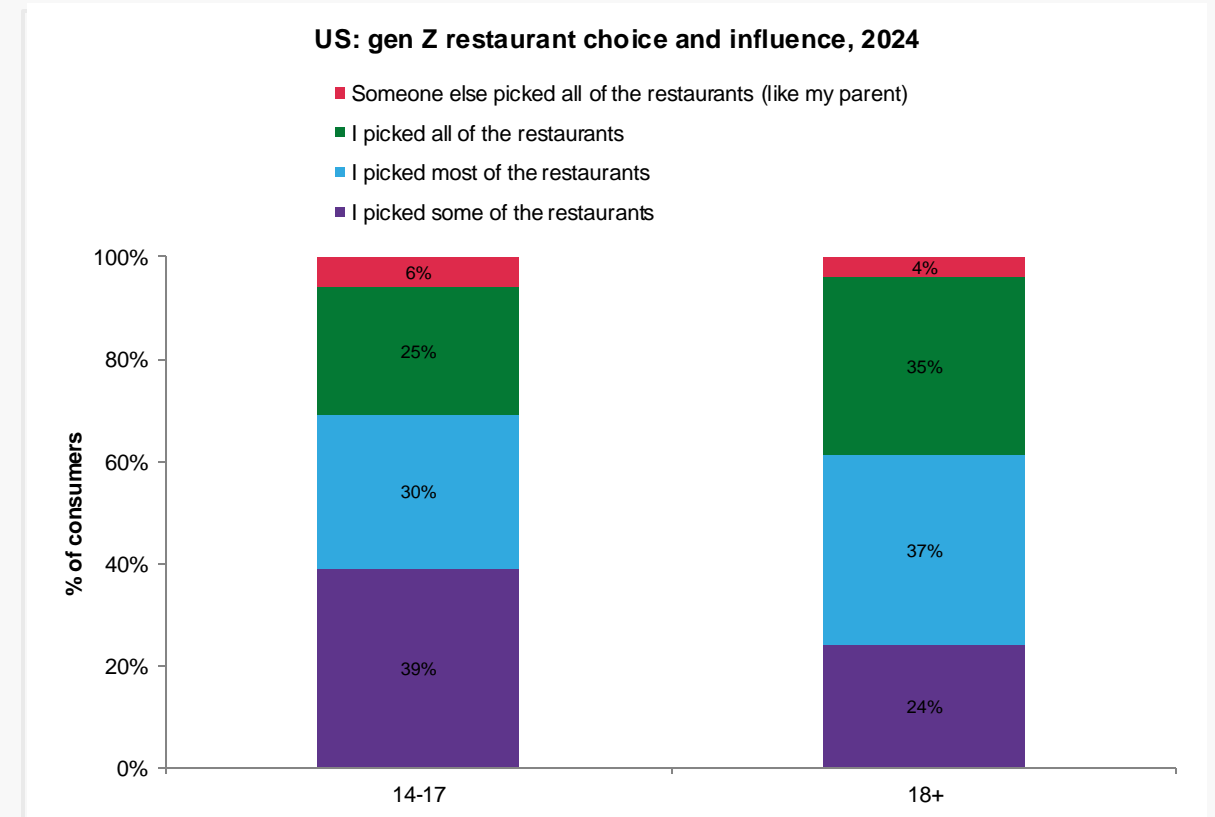
Foodservice

Ignoring teen Gen Z now leaves both current and future opportunities on the table

Purchasing power and influence starts even before youth are earning their first full-time paychecks, with a quarter of teens choosing all restaurants they ate at in the last three months, and 96% having at least some say.

The good news: some restaurant attributes are universally sought after, as even teens look for qualities like good service.

Teens, likely motivated in part by transportation challenges, are more likely to look for takeout/delivery, while adult Gen Zs are more concerned with location and atmosphere. Ensuring dairy products travel well for delivery can prevent negative associations early on.



Base: 992 internet users aged 14-17 who have ordered from a restaurant in the past three months; 2,863 internet users aged 18+ who have ordered from a restaurant in the past three months

Source: Kantar Profiles/Mintel, February 2024

MINTEL

Read on [mintel.com](https://www.mintel.com)

Associations with foodservice and food at home

Self-care though food has a surprising association

For Gen Z, self-care isn't associated with convenience, ease or the experience of "going out" to eat. Instead, self-care is more strongly associated with cooking. A quarter of teen Gen Zs agree that from-scratch cooking is a form of self-care, a perhaps surprising number that jumps to 35% with adult Gen Z.

Self-care as an act, not a purchase, seems to be a driving mindset underwriting cooking: meditative chopping, focus on a singular task, and a final result that feels fresh, healthy and satisfying.

These associations are not new, even if the term "self care" is relatively so. The idea that home-cooked meals are "made with love" persists, and brands can lean into this messaging for Gen Z, using more modern language to ensure intentions land.



Base: 1,000 internet users aged 14-17; 3,000 internet users aged 18+

Source: Kantar Profiles/Mintel, February 2024

MINTEL

Read on [mintel.com](https://www.mintel.com)

Self-care messaging can be boosted by other associations

Cooking at home is more likely to be fun or relaxing than other meals, and avoids negative associations, like expensive and wasteful

None of these	8	13	6	5	10
Good when I am alone	25	25	25	13	29
Good with a group	27	21	20	40	13
Fun	36	24	21	33	16
Relaxing	39	25	27	41	21
Wasteful	6	9	10	8	10
Expensive	10	13	25	33	19
Convenient	33	40	55	31	52
A form of self care	35	13	15	17	12
	Cooked at home (from scratch)	Meals at restaurants without waiters	Take out/delivery	Meals at restaurants with waiters	Pre-made meals from a store (frozen or fresh)

Base: 3,000 internet users aged 18+

Source: Kantar Profiles/Mintel, February 2024

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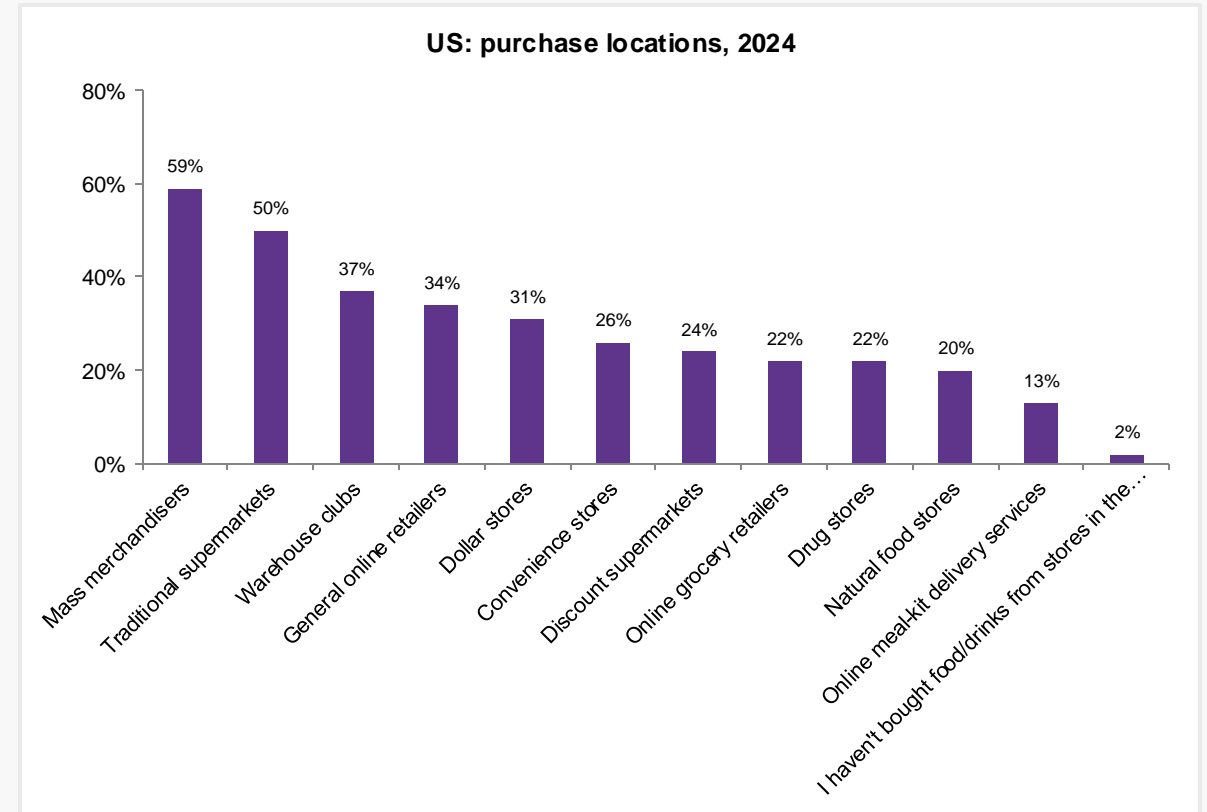
Read on [mintel.com](https://www.mintel.com)

Retail purchase location

Retailers that are clear about how to shop on a budget or curate a grocery list allow Gen Z to step into adulthood with confidence.

With adulthood comes independence, and the ability to be more choosy with retailers. Young adults are also shopping in new categories, like groceries, or at least shifting their mindset toward purchasing necessities, stocking their own pantries, and taking charge of meal planning and preparation.

Only 4% of those 14-17 are not shopping for food at all, so those 18+ are likely familiar with stores even if they are coming in with new purpose. Retailers that are clear about how to shop on a budget or curate a grocery list allow Gen Z to step into adulthood with confidence.



18+

Footnote (optional) (Limit: 130 characters)

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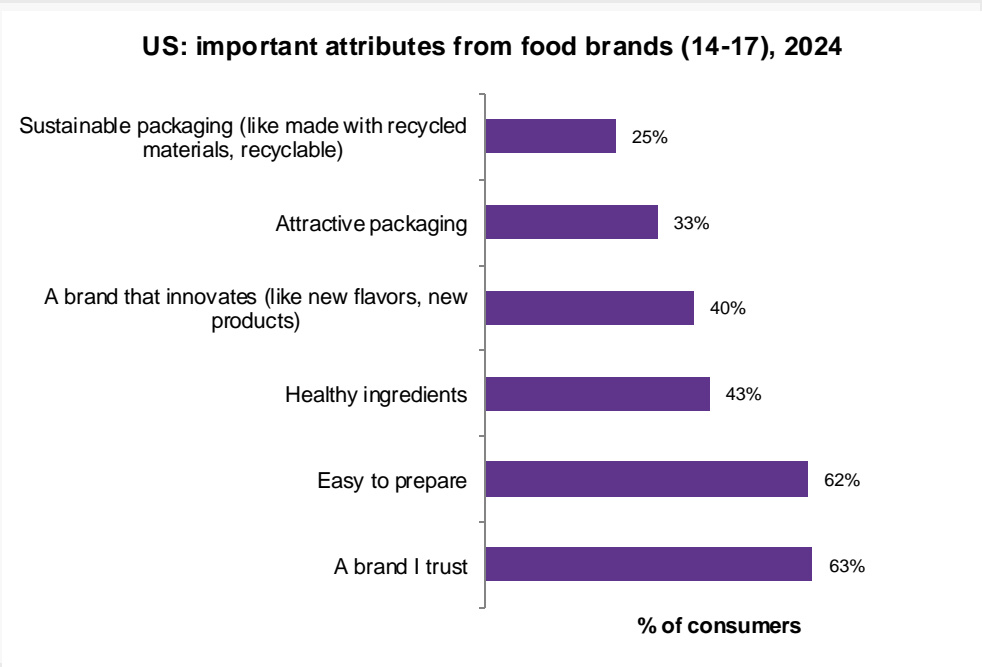
Source: Kantar Profiles/Mintel, February 2024

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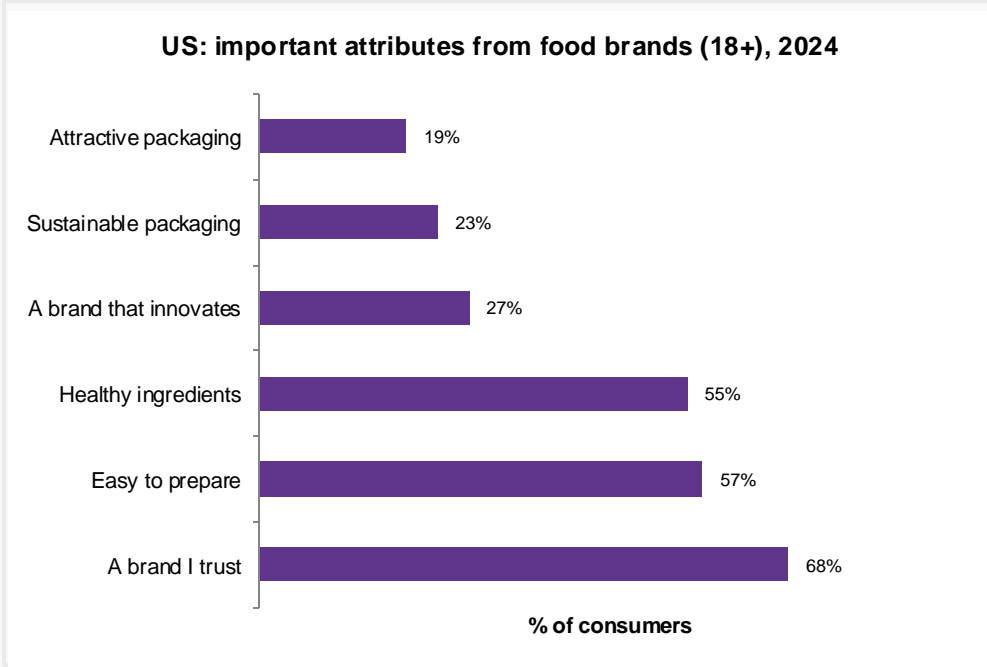
Read on [mintel.com](https://www.mintel.com)

Important attributes from food brands

Ease matters less as young adults acquire skill; brand, health matter more



14-17



18+

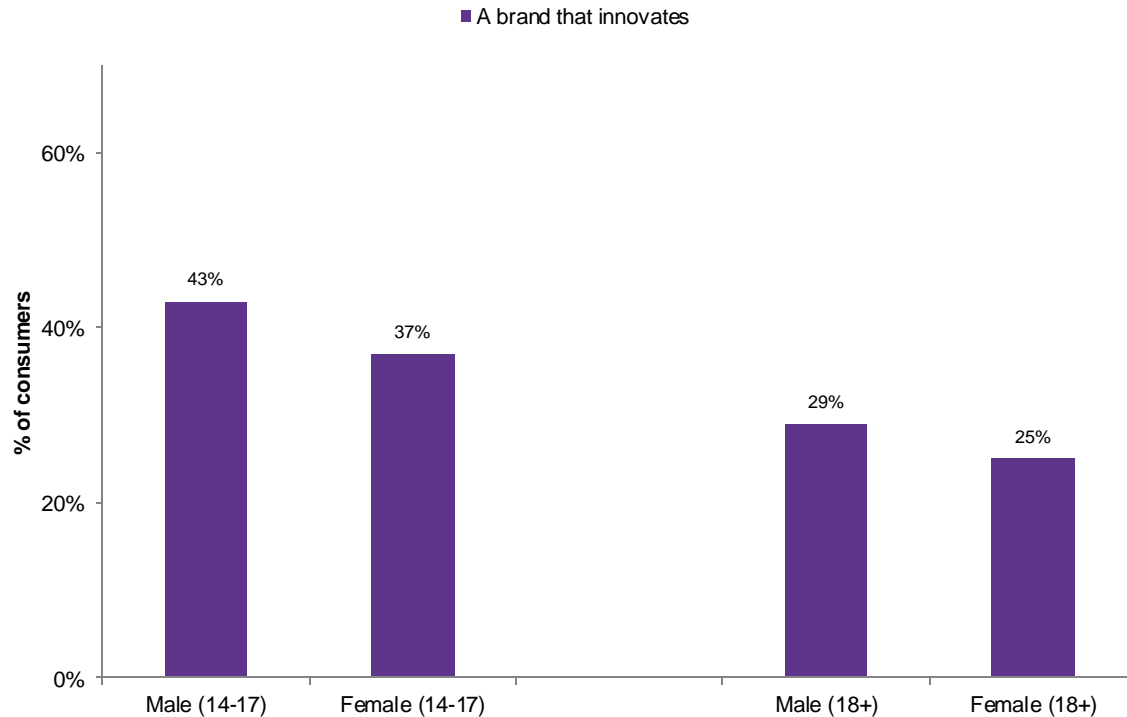
Base: 495 internet users aged 14-17 who have purchased food/drinks from stores in the past three months; 1,484 internet users aged 18+ who have purchased food/drinks from stores in the past three months

Source: Kantar Profiles/Mintel, February 2024



Young men lead innovation interest

US: Important attributes from food brands, by age and gender, 2024 - A brand that innovates



A paradox emerges as young men express the most interest in innovation, yet are shopping at fewer locations for food, and are cooking less than women, [even into adulthood](#).

This presents a challenge for brands looking to capture Gen Z men: innovation must be truly attention-grabbing, as there are fewer opportunities to reach men while they are actually food shopping. Instead, sparking interest in other channels (eg, online) and then pushing them toward purchase will be more fruitful, if more complex. Snacks and other ready-to-eat products may also resonate more strongly than products that skew towards "ingredient" status and require prep.

Base: 495 internet users aged 14-17 who have purchased food/drinks from stores in the past three months; 1,484 internet users aged 18+ who have purchased food/drinks from stores in the past three months

Source: Kantar Profiles/Mintel, February 2024

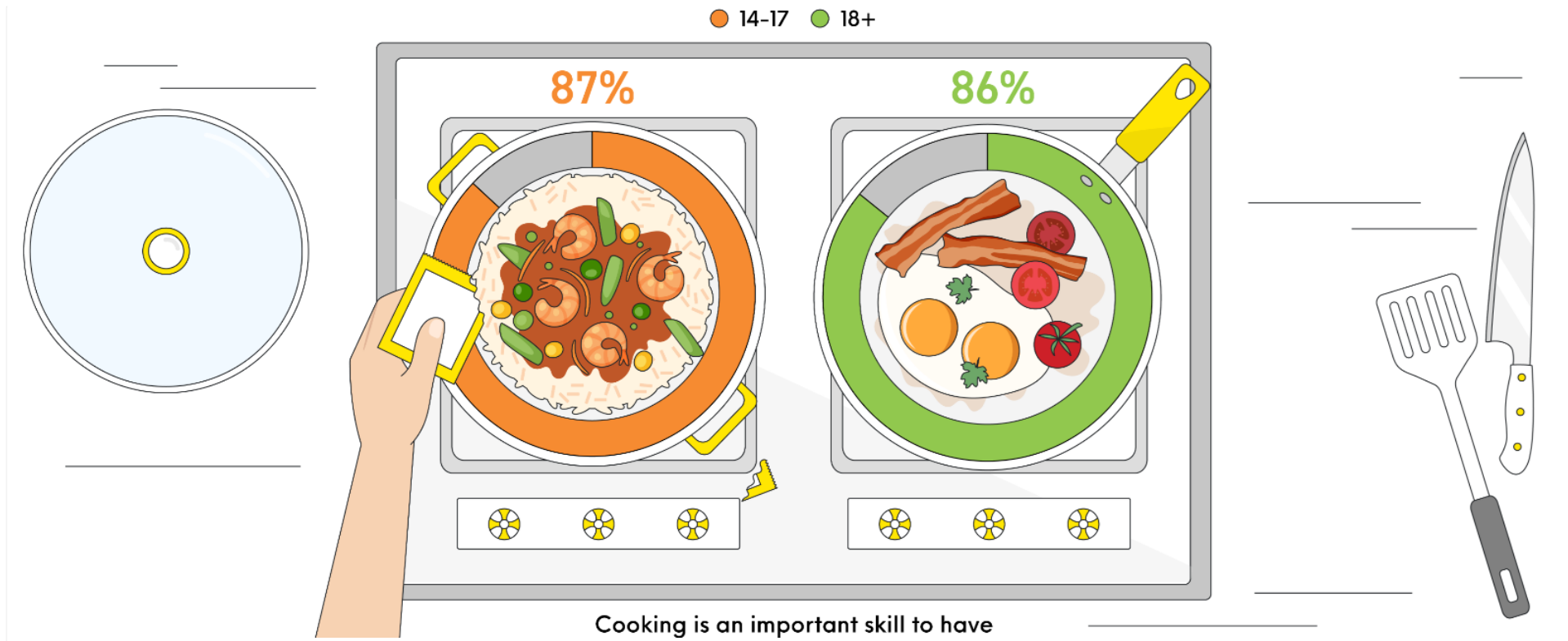
MINTEL

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Attitudes and behavior towards cooking

Teens value cooking as a skill and cultural connector

Ease teens into cooking with products appropriate for a range of skill levels to become the brand that teens take on their food journey into adulthood. Big flavor payoff with less effort is an example.



Base: 1,000 internet users aged 14-17; 1315 internet users aged 14-17 who cook

Source: Kantar Profiles/Mintel, February 2024

MINTEL

Read on [mintel.com](https://www.mintel.com)

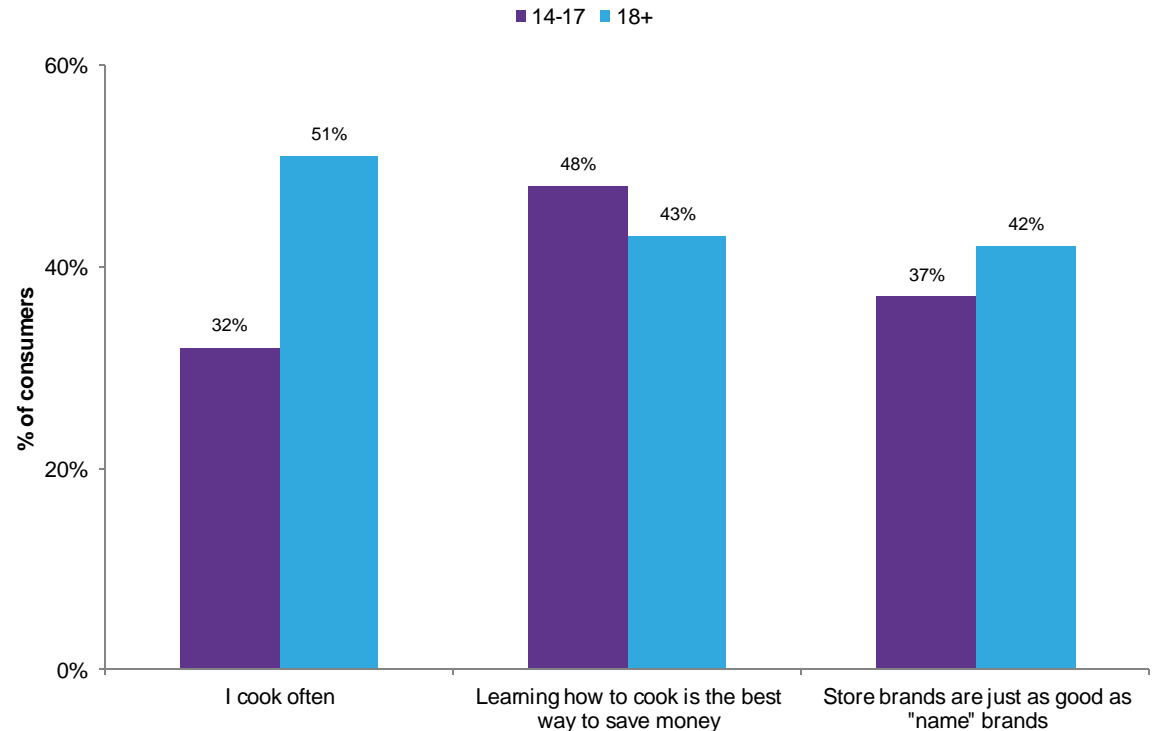
Help new adults get the most bang for their buck

Cooking takes an unsurprising leap as consumers hit 18. What may be a little more surprising is the decrease in associations between cooking and money savings.

Sticker shock at the grocery store may be part of the disconnect; another part may relate to learning how to shop smart.

Part of being a "partner" to Gen Z means teaching them where to allocate their dollars, where they can save money, and when a splurge might be warranted.

US: attitudes towards cooking and eating, 2024



Footnote (optional) (Limit: 130 characters)

Base: 1,000 internet users aged 14-17; 3,000 internet users aged 18+

Source: Kantar Profiles/Mintel, February 2024

Convenience is always cool

ALL GEN Z

50%

express interest in products that make cooking more convenient (like faster, easier)

While other qualities lose steam as Gen Z teens age up, convenience remains consistently important, underwriting a lasting opportunity. Achieving brand loyalty through convenience means allowing consumers to define convenience themselves: what might be a lack of skill now, may translate into a lack of time later.

As young adults start [to cook more](#) for themselves, they'll be looking for products that help them develop cooking skills, yielding the comfort of home-made alongside straightforward processes. Convenience, then, is key.

Base: 1,000 internet users aged 14-17; 3,000 internet users aged 18+

Source: Kantar Profiles/Mintel, February 2024

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Innovation + Marketing

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Read on [mintel.com](https://www.mintel.com)

Keeping up with celebrity clout and cachet is a must for potential partnerships

MICRO INFLUENCERS

38%

of social media influencer followers
trust smaller influencers more
than those with the most followers

In a recent Instagram story, Target teased an upcoming brand partnership, which was later revealed to be a partnership with Kylie Jenner.

Consumers – particularly younger ones – took to socials to express their discontent with the partnership. Of the 4,000+ comments on the announcement post, most were negative, calling out disappointment in Target for partnering with Jenner.

While celebrity brands and endorsements will remain an important and profitable part of the CPG landscape for Gen Z, it is critical that brands are judicious when selecting celebrity partners. Social currents can change quickly and without warning, so understanding Gen Z's perception of individual celebrities can help food CPG brands avoid PR messes.

Base: 1,148 internet users aged 18+ who follow social media influencers

Source: [Kantar Profiles/Mintel, June 2022](#)

MINTEL

Read on [mintel.com](#)

Play up pop culture moments

Taylor Swift's influence on popular culture cannot be overstated, down to her condiments of choice. When Swift was spotted eating chicken, and according to one fan account "seemingly ranch," the phrase went viral.

Heinz did not waste any time incorporating "seemingly ranch" into their marketing.

For products that are difficult to make new again, like ranch, tapping into flash-in-the-pan moments can be invigorating and capture the attention of younger audiences. Social media is undoubtedly the best route for deployment, as these moments do have limited lifespans.



Find ways to evolve legacy brands, branding



McDonald's was able to bring new life to a beloved character and become one of the top trends on TikTok. While McDonald's doesn't suffer from a lack of brand awareness, building rapport with younger generations is important for future brand health.

In June 2023, it announced a purple milkshake as an honorary LTO in celebration of Grimace's birthday.

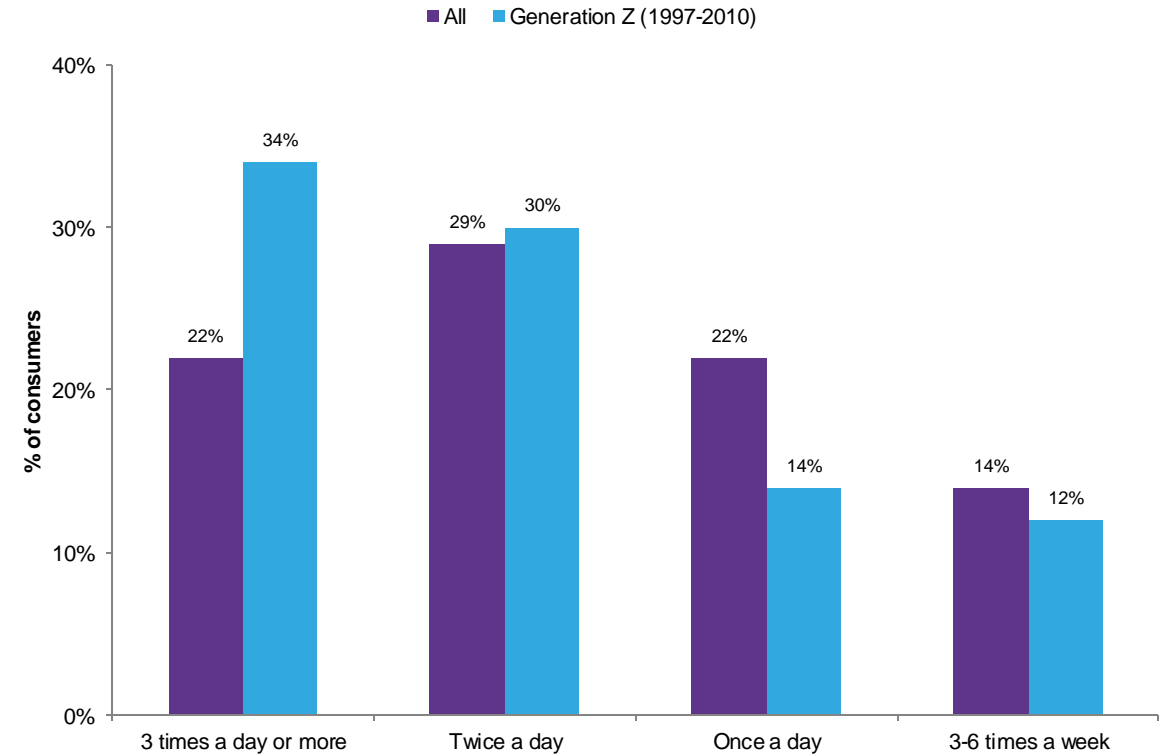
Fans took the campaign to a new, unexpected level with the hashtag #grimaceshake, where creators pretended to meet their own early demise after drinking the shake. The hashtag has had 145+ million views.

Snack brands are in a good spot; other brands should become more snackish

The distinction between meals and snacks is blurring, with Gen Z leading the charge. The younger generation is snacking more per day than any other generation – all before (most) enter parenthood, when snack habits typically gain momentum.

Better-for-you snacks are a particularly strong opportunity; at 2+ times a day, healthy snacks ensure Gen Z meets their nutritional needs, especially for the 30% that are replacing more traditional meals with snacks.

US: snacking frequency, by generation, 2023



Base: 1,973 internet users aged 18+ who snack

Source: Kantar Profiles/Mintel, November 2023

MINTEL

Read on [mintel.com](https://www.mintel.com)

Key takeaways

A flavorful essential for Gen Z cooks

Dairy can lean heavily into its ability to provide big flavor and craveable texture as Gen Z learns to cook. Dairy also benefits from its ability to lean BFY and indulgent depending on an overall recipe or approach to cooking.

Let Gen Z play with their food

Even the oldest Gen Z are quite young; they're experimenting, finding their tastes and preferences, and the building blocks of future loyalties. Becoming a part of that foundation means taking them seriously, but not forcing them to *be* serious when it comes to food.

Legacy brands need an "in" with Gen Z

Updating elements of branding and brand story helps Gen Z emotionally connect, building the foundation for future loyalty. Viral trends and pop culture moments can offer opportunity if brands are engaged enough to seize the often-fleeting moments.



Gen Z Perceptions of Dairy

December 10th, 2024

Primary Insights: Attitude, Awareness & Usage (AAU)

Adolescent Gen Z

Online Survey

250 Respondents

› Teens age 13-17 in MWD states

From 9/27/2024 – 10/16/2024



Primary Insights: Attitude, Awareness & Usage (AAU)

Adults

Online Survey: Directions Research

- › **1000 Respondents**

Adults age 18+ in MWD states*

- › As well as

- › **515 Respondents**

Adults age 18+ nationally

Responses collected between 9/05/2024 – 9/27/2024



78%

of Gen Z in the Midwest Dairy Region say they

“LOVE DAIRY”

88%

Total Adults



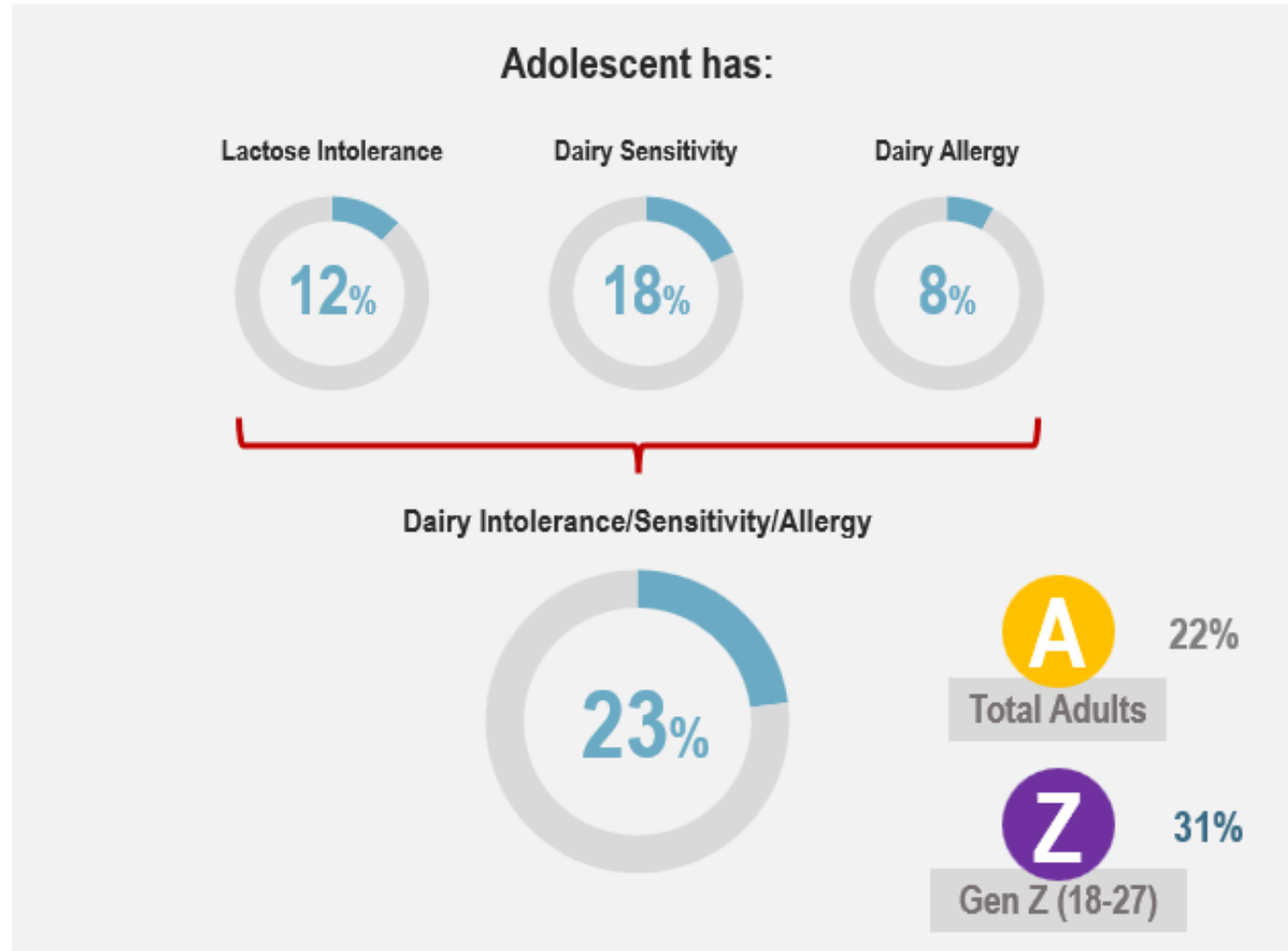
**Dairy consumption
among Gen Z is
VERY strong!**

93%

**of Gen Z
Consume Dairy**



Adult Gen Z and adolescent Gen Z have higher rates of dairy sensitivities.



Source: Total Adolescents in Midwest Dairy Region (n=250)

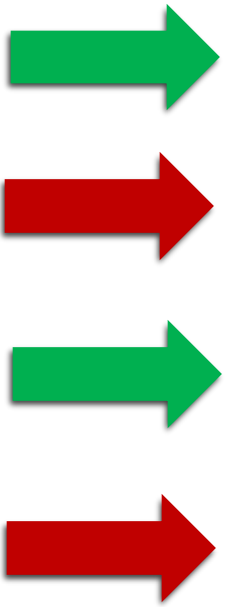
Colored callouts indicate $\pm 5\%$ difference from adolescent sample (blue higher than, red lower than)

D9: Does your child have any of the following? | D10: Has your child's lactose intolerance, dairy sensitivity, and/or dairy allergy been diagnosed by a doctor?

Trust Index



Adolescent trust lags behind that of adults. To boost dairy perceptions among this group, address concerns related to all four trust factors.



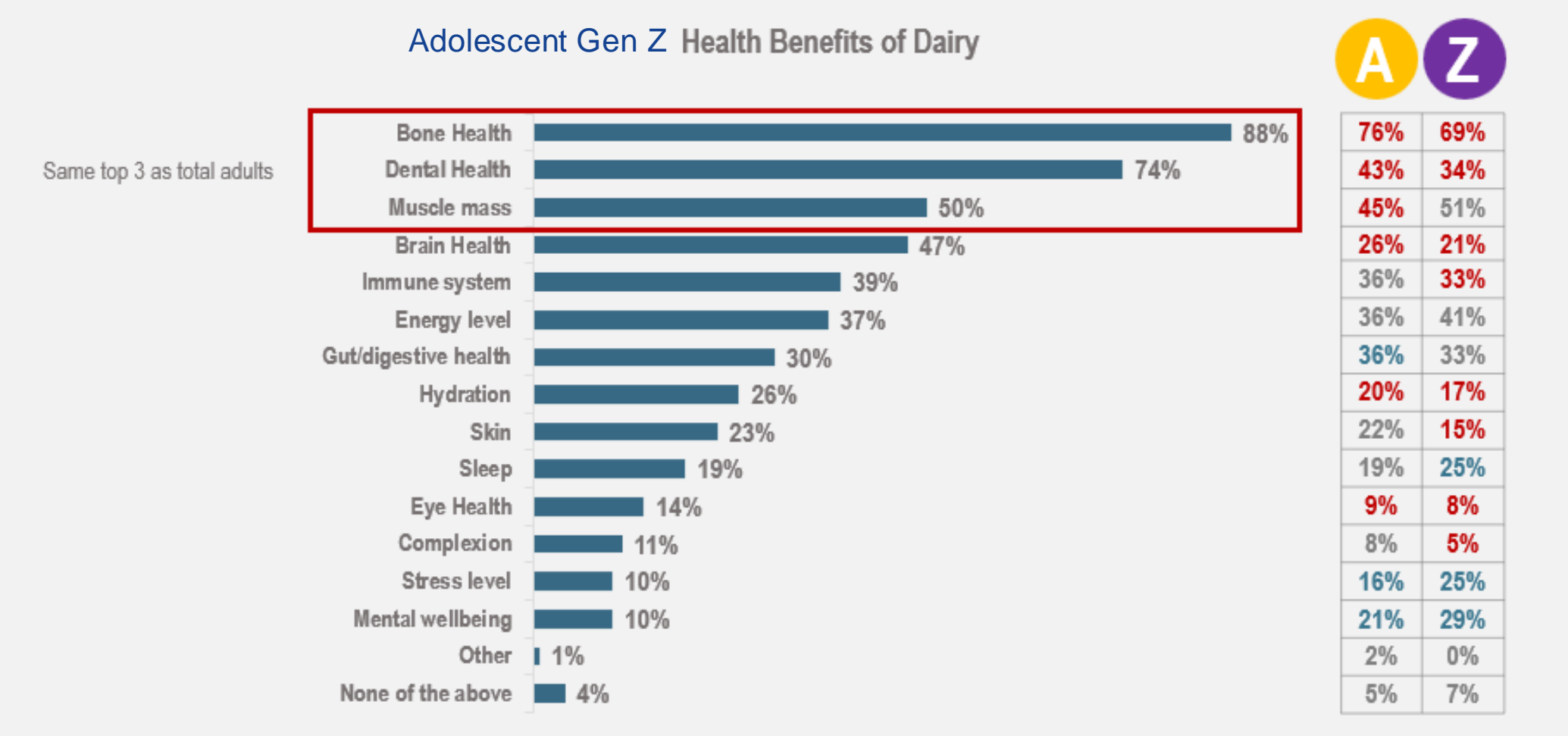
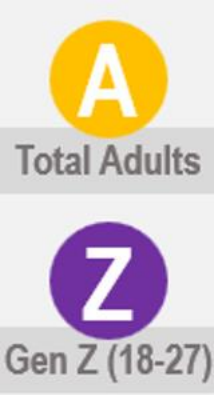
	Adolescents	A	Z
Trust index	14.9	16.0	15.4
Healthy & nutritious	75%	86%	80%
Environmentally friendly	50%	59%	56%
Safe to consume	78%	85%	80%
Looking out for my best interests	43%	54%	48%

A
Total Adults

Z
Gen Z (18-27)

Source: Total Adolescents in Midwest Dairy Region (n=250)
 Colored callouts indicate ± 5% difference (blue higher than, red lower than adolescent sample)
 Percentages are top-two box scores (Strongly agree + Somewhat agree)

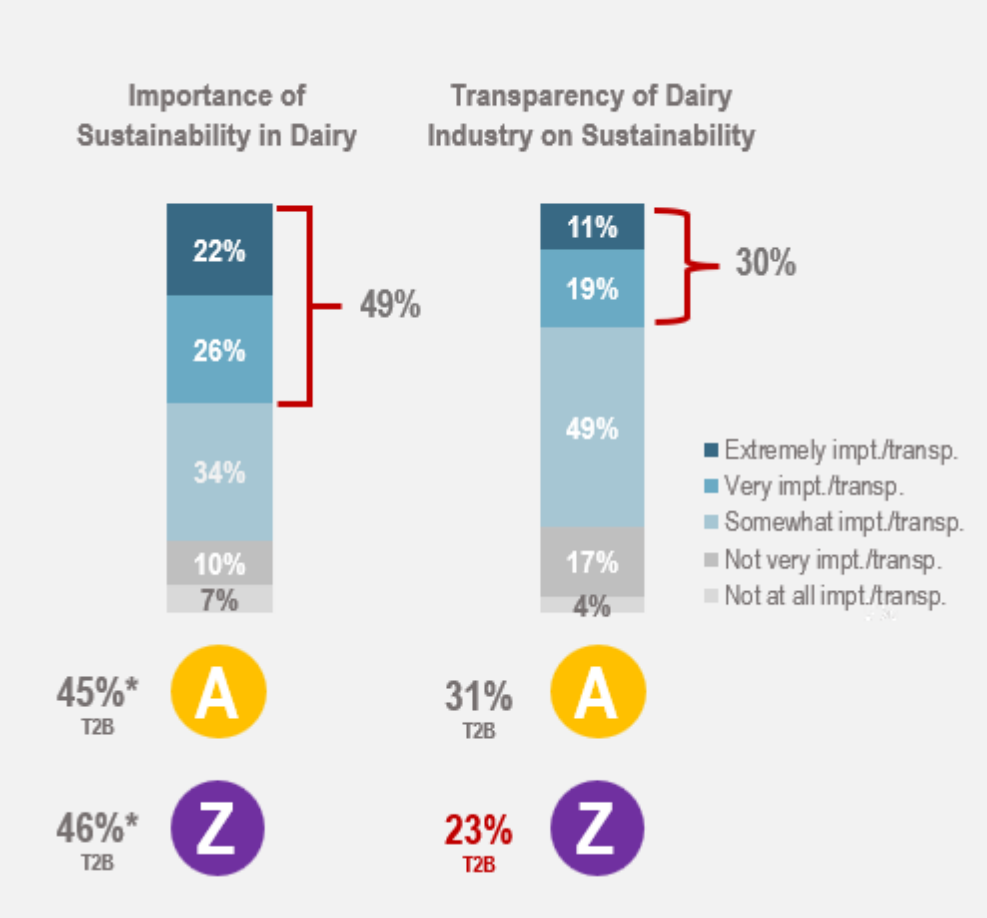
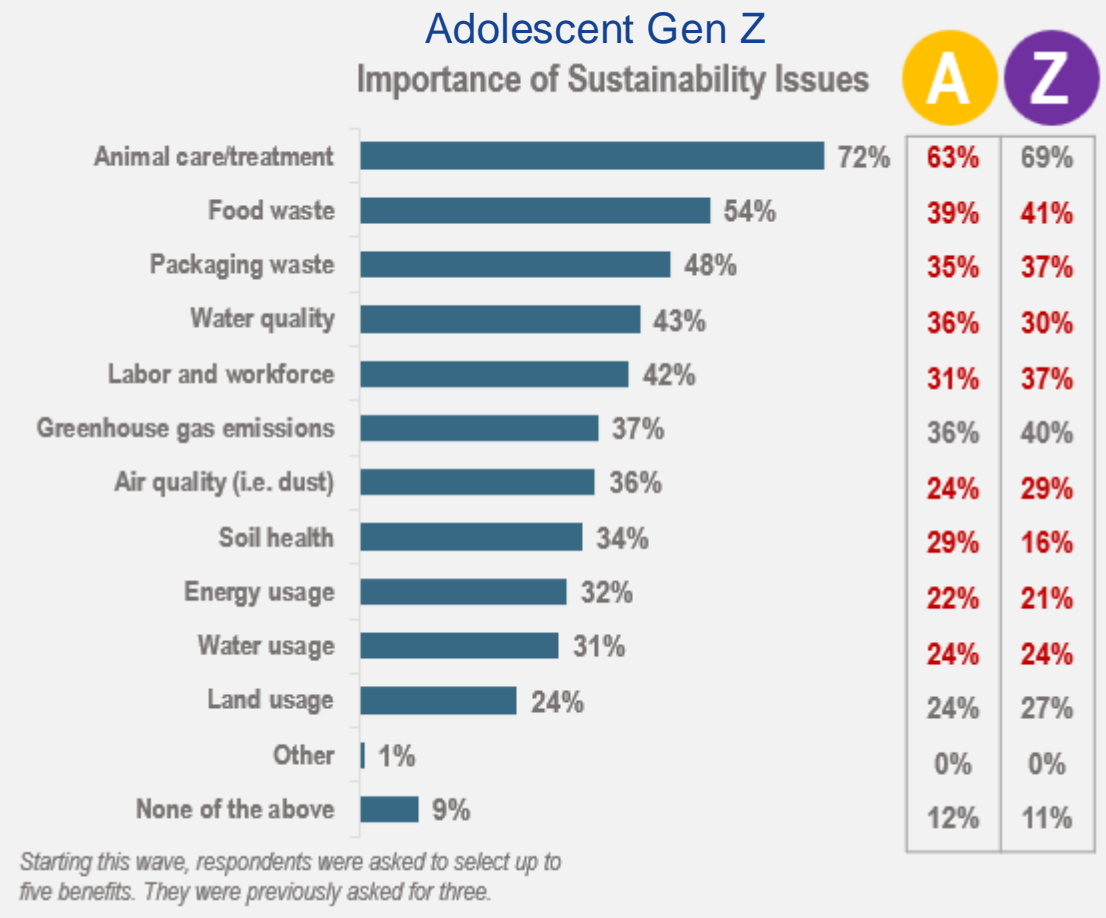
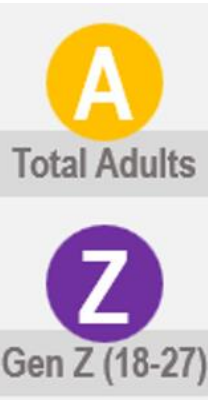
The differing perceptions of dairy benefits between adolescent Gen Z adolescents and adult Gen Z suggests a shift in health priorities and understanding as they mature.



Source: Total Adolescents in Midwest Dairy Region (n=250)
 Colored callouts indicate ± 5% difference (blue higher than, red lower than adolescent sample)
 Q18: Please select the **top FIVE** benefits that you feel dairy products provide for your personal wellness. Dairy products improve my...

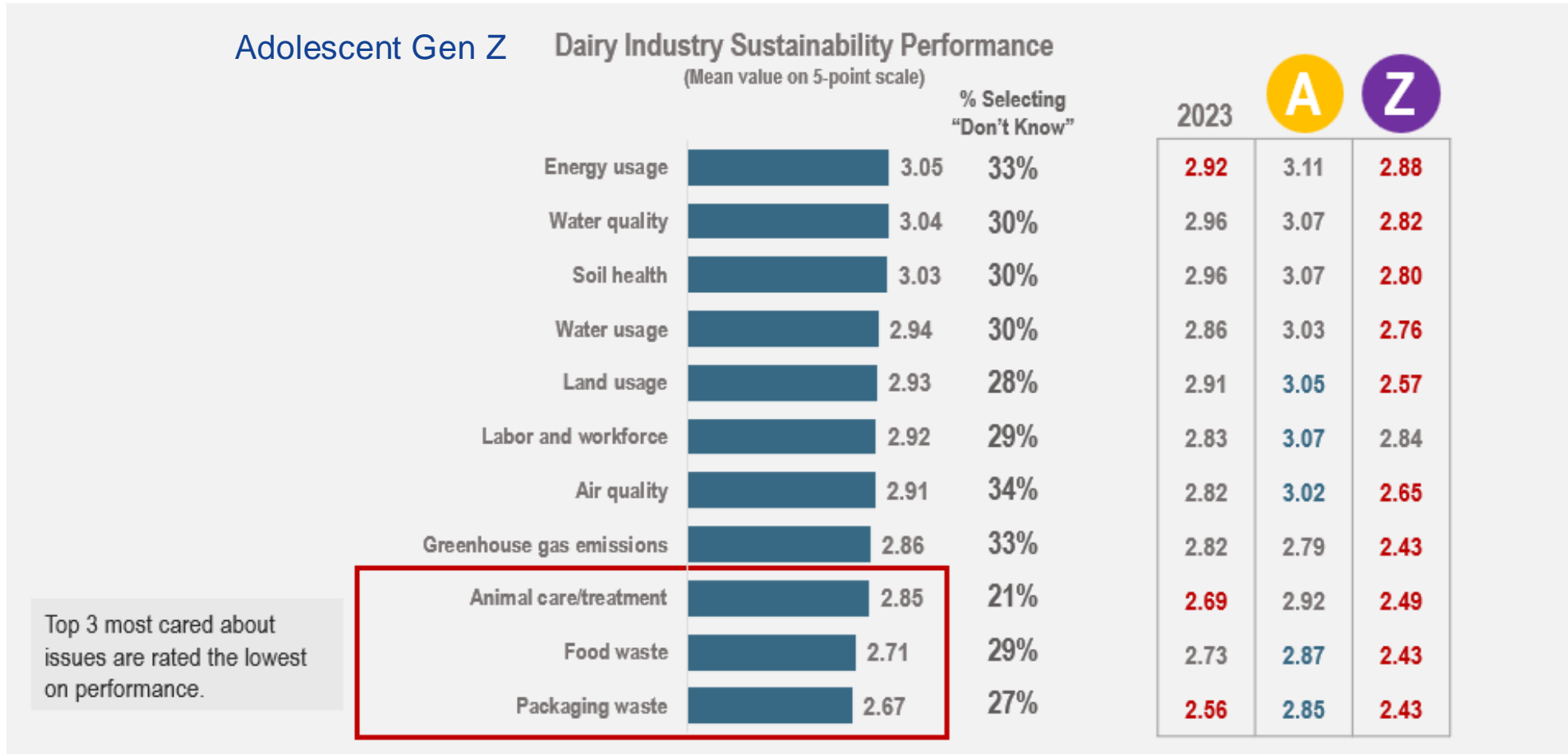
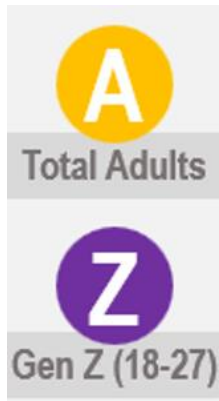
Starting this wave, respondents were asked to select up to five benefits. They were previously asked for three.

Sustainability issues are more important to adolescent Gen Z and adult Gen Z than other adults, making it crucial to address these concerns through targeted messaging.



Source: Total Respondents in Midwest Dairy Region (n=1000), Total National Respondents (n=515)
 Q27 Of the following sustainability issues which **FIVE** would you most like the dairy industry to address?
 Q29 How transparent do you think the dairy industry is with regards to sustainability?

Adolescents rate the dairy industry's sustainability performance slightly lower than overall adults on most measures, but higher than adult Gen Z.



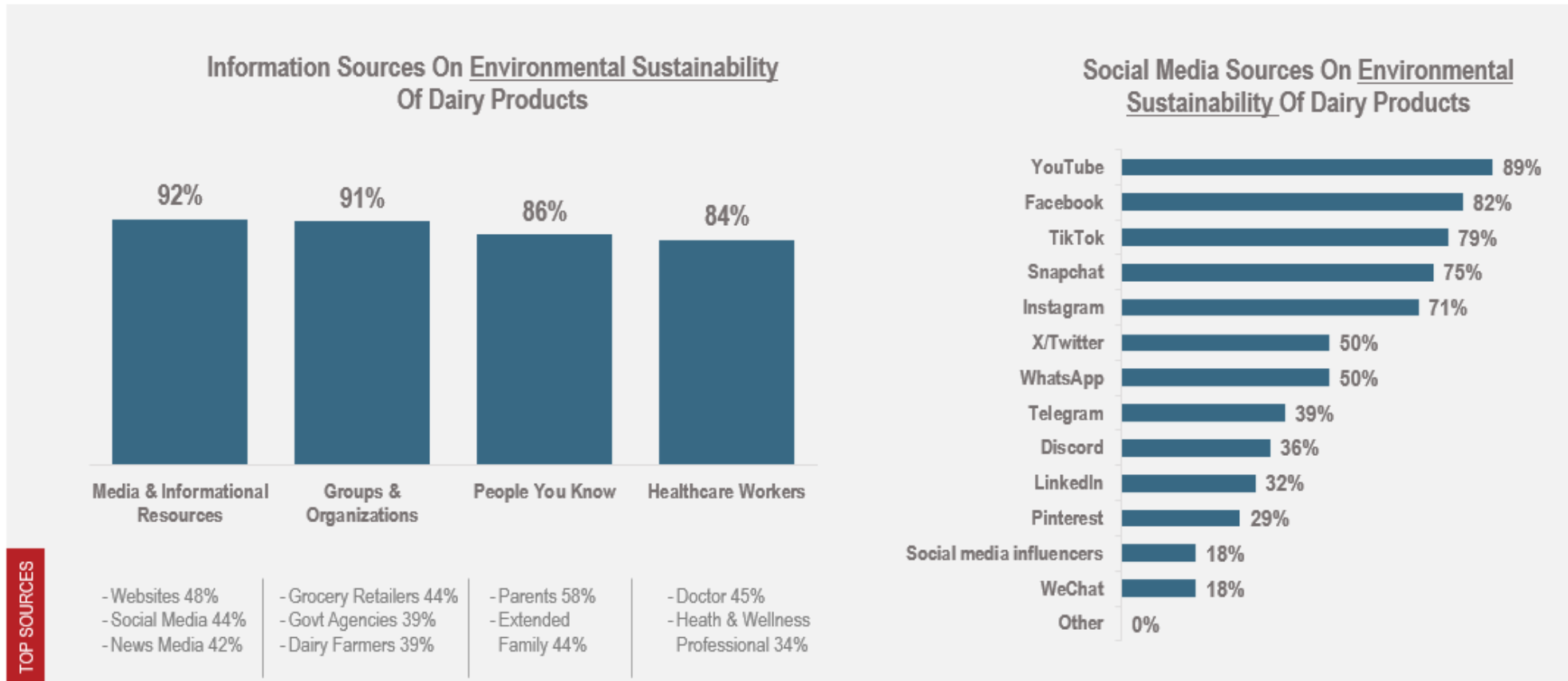
Source: Total Adolescents in Midwest Dairy Region (n=250)

• Scale = Excellent (5), very good (4), good (3), fair (2), poor (1)

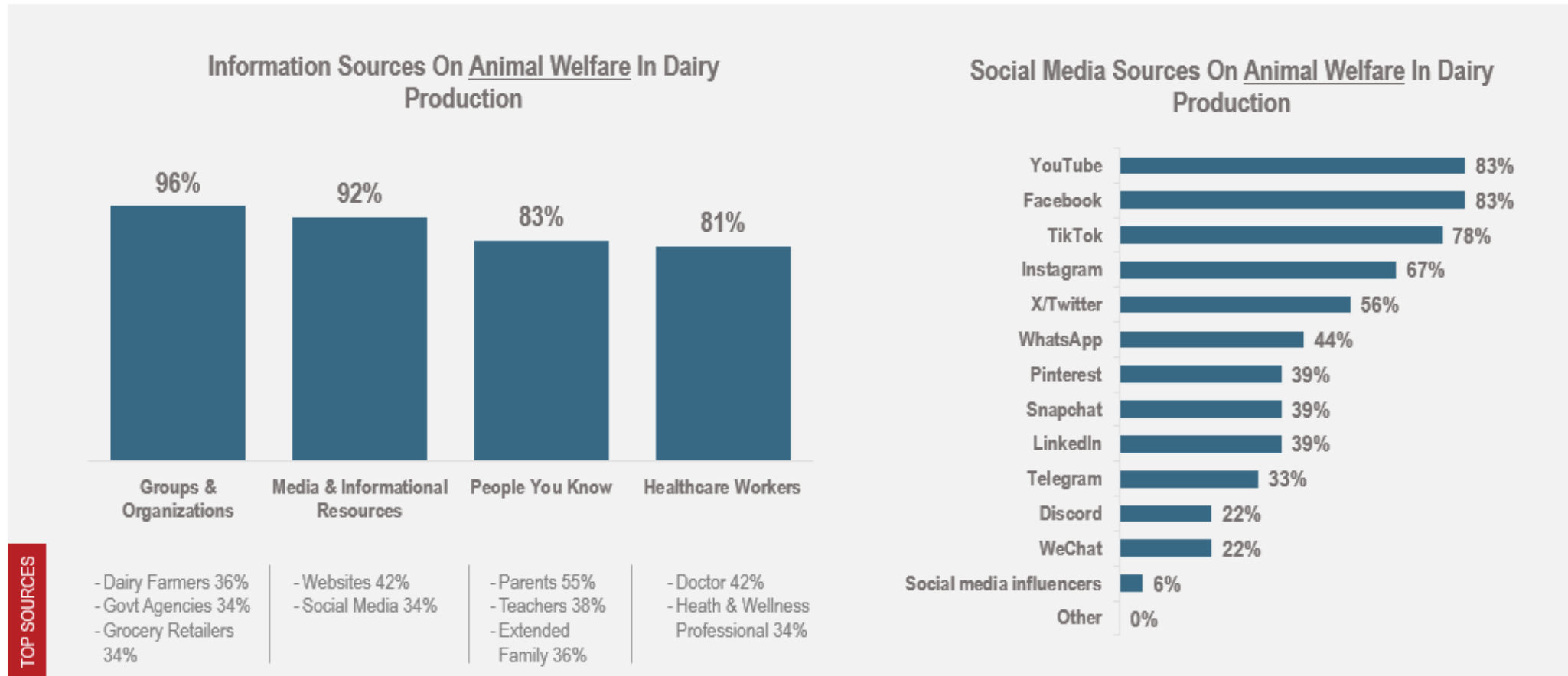
Colored callouts indicate ± .1 difference in mean score (blue higher than, red lower than current year/adolescent sample)

Q21 How would you rate the job the dairy industry is doing to positively impact the sustainability issues you selected as important?

Leveraging social media and trusted, authoritative sources can serve as an effective means of educating adolescents on dairy and its environmental sustainability.



Similarly, educating adolescents about animal welfare in dairy production can benefit from leveraging social media and trusted sources, with an emphasis on third-party organizations to enhance credibility and understanding.



Key Findings: Gen Z in the Midwest Dairy Region

- Gen Z's love of dairy is very strong; however, their trust is critical to dairy's long-term success. The dairy industry will need to focus on growing Gen Z's trust to ensure dairy's place in their limited refrigerator space.
- Although Gen Z tend to have more dairy sensitivities, most agree that dairy products are healthy and nutritious as well as safe to consume.
- Gen Z consumers tend to be less confident than older consumers that dairy products are environmentally friendly and that the dairy industry is looking out for them. Notable concerns loom around animal welfare.

Recommendations for Winning Over Gen Z

- Gen Z is open learning about dairy. They are naturally curious and are interested in learning about dairy's sustainability story. Specifically, they want to know how farmers are caring for their dairy cows and how the dairy industry is improving the environmental friendliness of dairy.
- Since Gen Z report higher levels of dairy sensitivities compare to older consumers, building awareness around lactose free dairy products is key.
- Gen Z are most open to learning about dairy products from their parents, their healthcare professionals, their teachers, news media, government agencies, dairy farmers, retailers and social media. Communicate with Gen Z through these channels and influencers.
- Ask Midwest Dairy for help. We are here for you!

Questions?



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Thank You!

