



FLEISHMANHILLARD

# GEN FOOD

*Shaping the Future of Food*

November 2018







FleishmanHillard's global team of more than 150 dedicated food, agriculture and beverage specialists constantly track the emerging issues and change agents that shape what and how the world eats and drinks. Most recently, we surveyed engaged food consumers to determine what different generations care most about when it comes to food.

Working with our TRUE Global Intelligence™ practice, we defined engaged food consumers as those who agreed with at least two screening statements about their food and nutrition behaviors. We then surveyed these consumers across four generations – Gen Z, Millennials, Gen X and Boomers – to examine their respective relationships with food.

**The survey findings reveal shared beliefs and behaviors across all generations rather than dramatic differences between generations. We call these cross-generational influencers “Gen Food,” because food unites them, and their collective set of values motivates them to take more responsibility for improving the way we all eat.**

#### **The values that shape Gen Food's desire to fuel a better future through food include the following:**

- 1. Food defines them.** Of those surveyed, 91% see food as an important part of their value and belief system, with 35% saying that food actually defines who they are and what they believe.
- 2. They're taking responsibility.** Approximately 60% identify themselves as being primarily responsible for improving what and how we eat, more than food companies, government and health professionals. And they're educating themselves – 35% say they're spending more time researching products than they did a year ago. Eight in 10 feel it's their role and responsibility to share food information with others.
- 3. They're taking action.** More than 80% believe they can make a difference in the kinds of foods we eat and how they are grown. And 78% have taken action to address food issues important to them, with reducing food waste as their top priority. Those who haven't taken action say it's because they don't know what to do or where to start.

#### **Implications for Food, Agriculture and Beverage Companies**

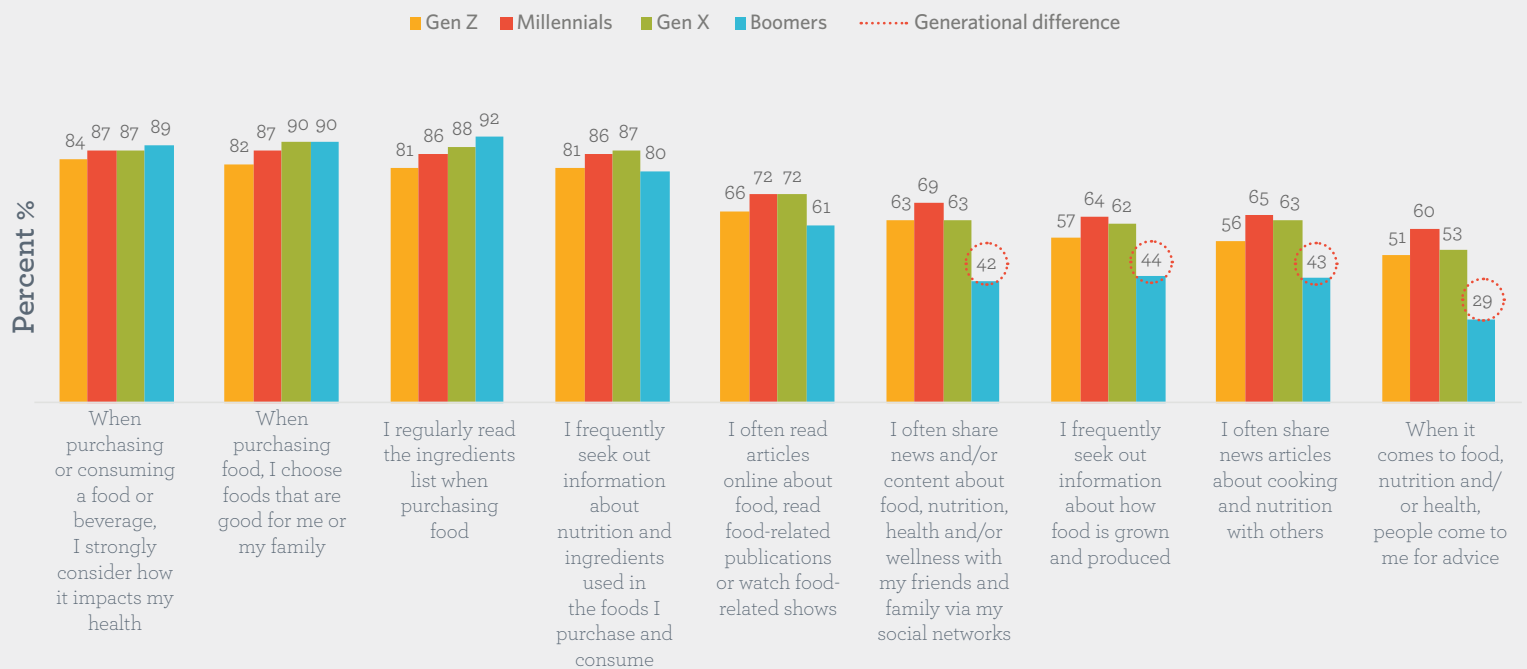
The biggest news here is that everyone in the food chain has the potential to be more effective and efficient by focusing on this highly engaged group of influencers as a way to communicate across all generations. We can follow Gen Food's lead by:

- Speaking their language and understanding their values to have more relevant conversations around a range of food issues, from sustainable nutrition to agricultural practices to food waste;
- Focusing our innovation and communications on the benefits of food, as those benefits become the primary drivers of food choices;
- Making it easy for consumers to take action by creating simple and real ways for them to contribute to a better, more responsible food system.

**As a company that's been rooted in food and agriculture for more than 70 years, we're excited about where Gen Food will take us.**

# FOOD DEFINES THEM

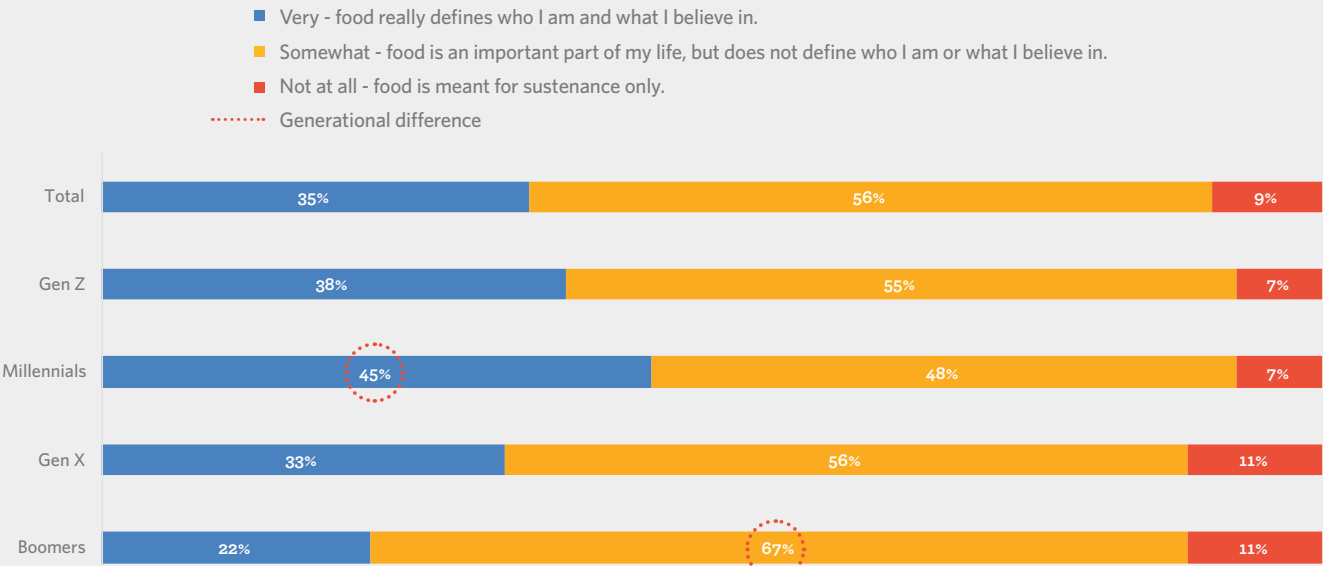
Engaged food consumers agreed with at least two screening statements about their food and nutrition behaviors.



S4: To what extent do you agree or disagree with the following statements? T2B: Strongly agree or agree

**Food is Personal.** In today's high-tech, on-demand world, the notion of food as a personal, connective, human experience is alive and well. Gen Food has made changes to be more engaged and involved with how their food is sourced, sold and cooked.

FOOD IS PART OF THEIR VALUE AND BELIEF SYSTEM



Q16: How critical is food to your value and belief system?

CHANGES IN SHOPPING BEHAVIORS: WHAT GEN FOOD IS DOING MORE



Q9: Over the past 12 months, how have your food shopping and food planning/preparation behaviors changed? Are you doing the following more or less?



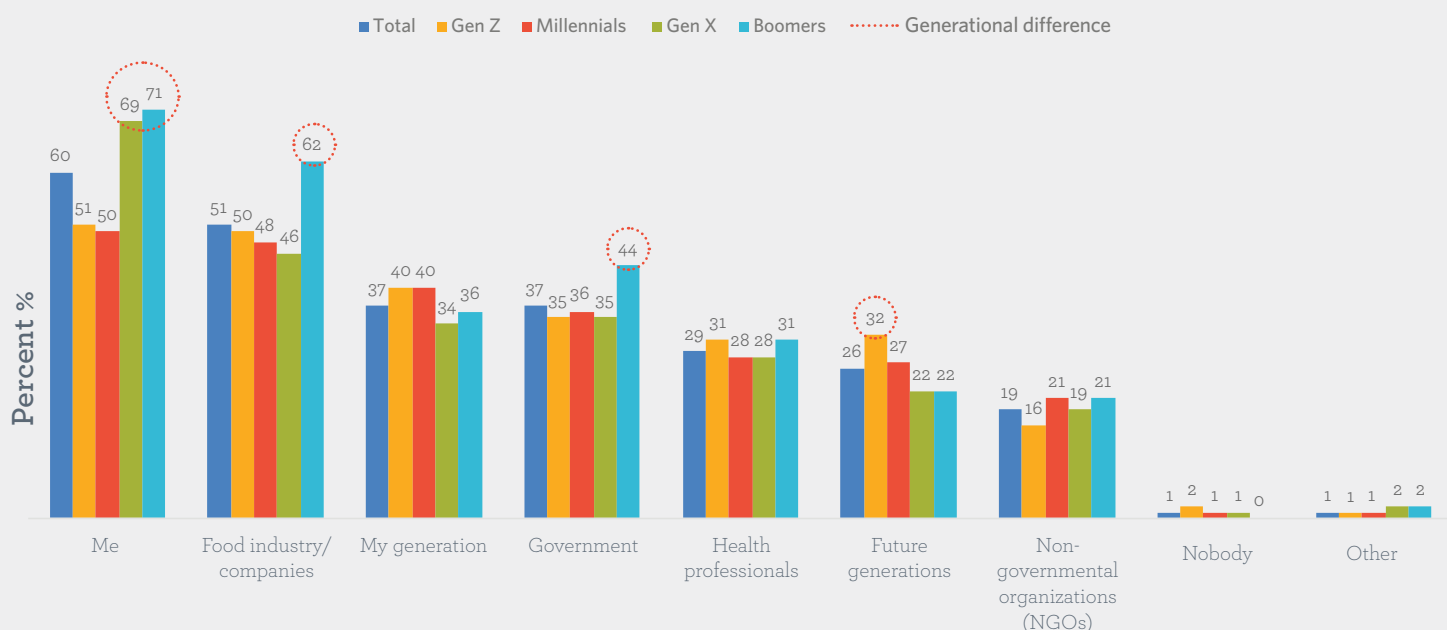
# THEY'RE TAKING RESPONSIBILITY



Gen Food takes itself seriously when it comes to helping us all eat better. When asked whose responsibility it is to improve what and how we eat, 60% said “me” – ahead of food companies, government and health professionals.

In part, that means being thorough and thoughtful about the choices they make and how they use nutritional information. More than a third of respondents say they now research products more thoroughly before they purchase them than they did a year ago. What’s more, nearly 80% say they feel a responsibility to share what they learn and know with others.

## WHO IS RESPONSIBLE FOR WHAT/HOW WE EAT?

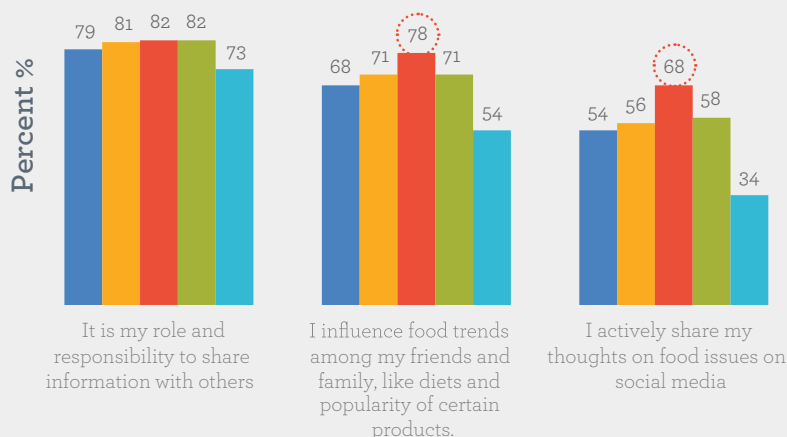


Q28: In your opinion, whose responsibility is it to improve what and how we eat?



## INFLUENCE AND RESPONSIBILITY

■ Total ■ Gen Z ■ Millennials ■ Gen X ■ Boomers ..... Generational difference

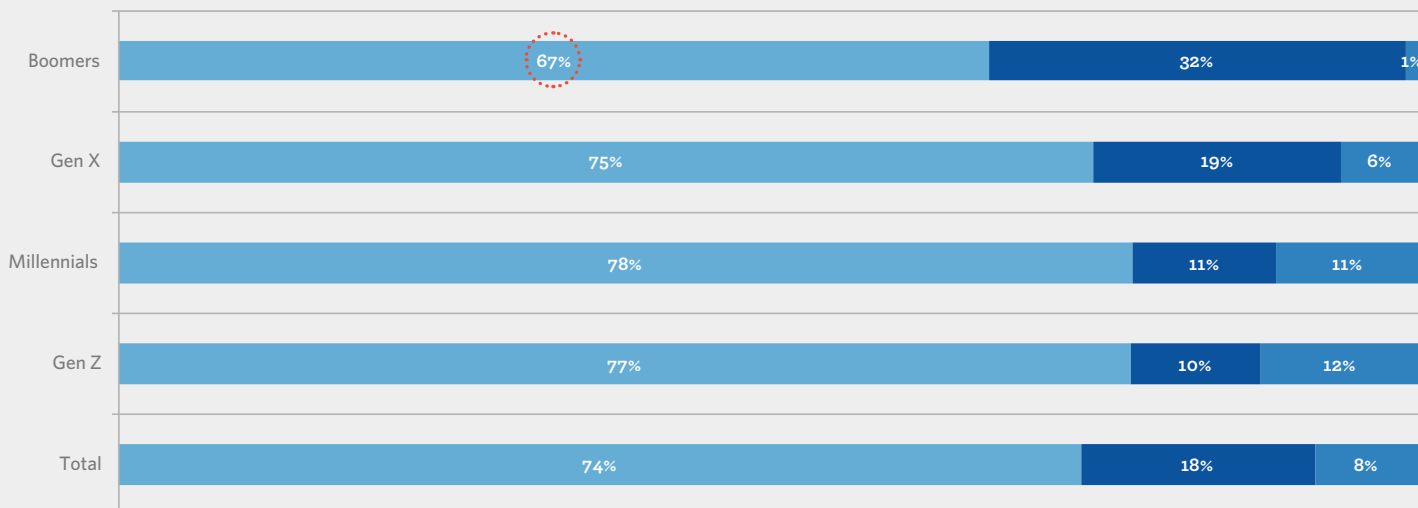


Q29: How much do you agree with the following statements? TB: Strongly agree

Three in four respondents say they've become more mindful of what they eat over the last 12 months, and that mindfulness is largely focused on taking responsibility for their health.

## MINDFUL EATING: ON THE RISE

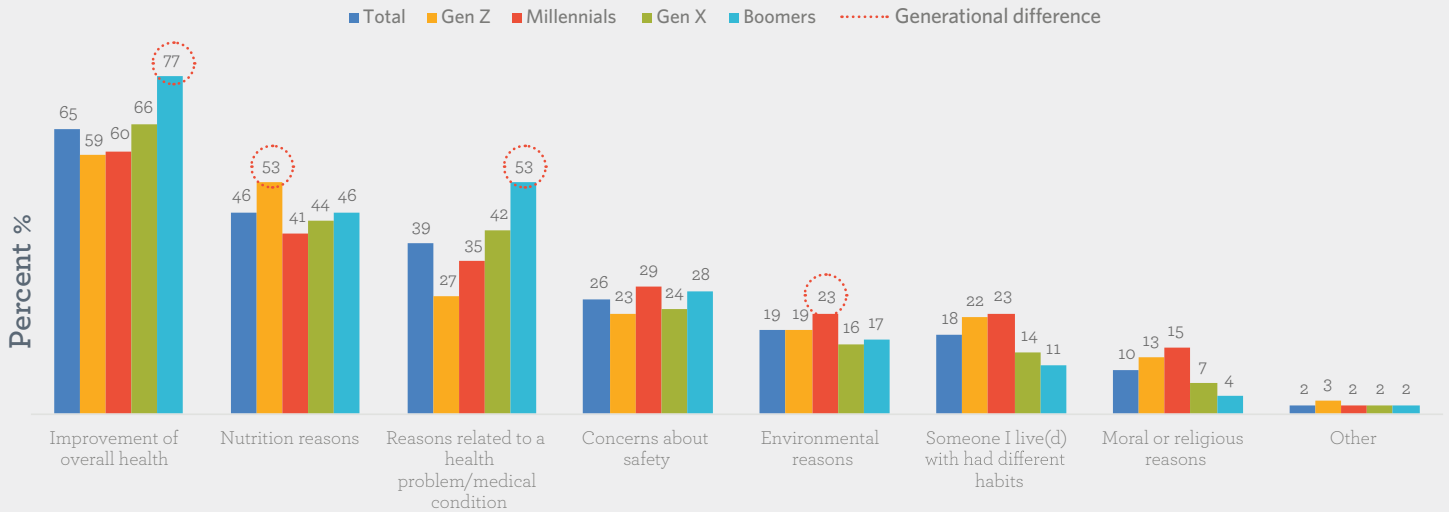
■ I am more mindful of what I eat ■ I am the same ■ I am less mindful of what I eat ..... Generational difference



Q6: Compared to 12 months ago, which statement best describes you?

Note: Due to rounding, totals can vary +/- 2%

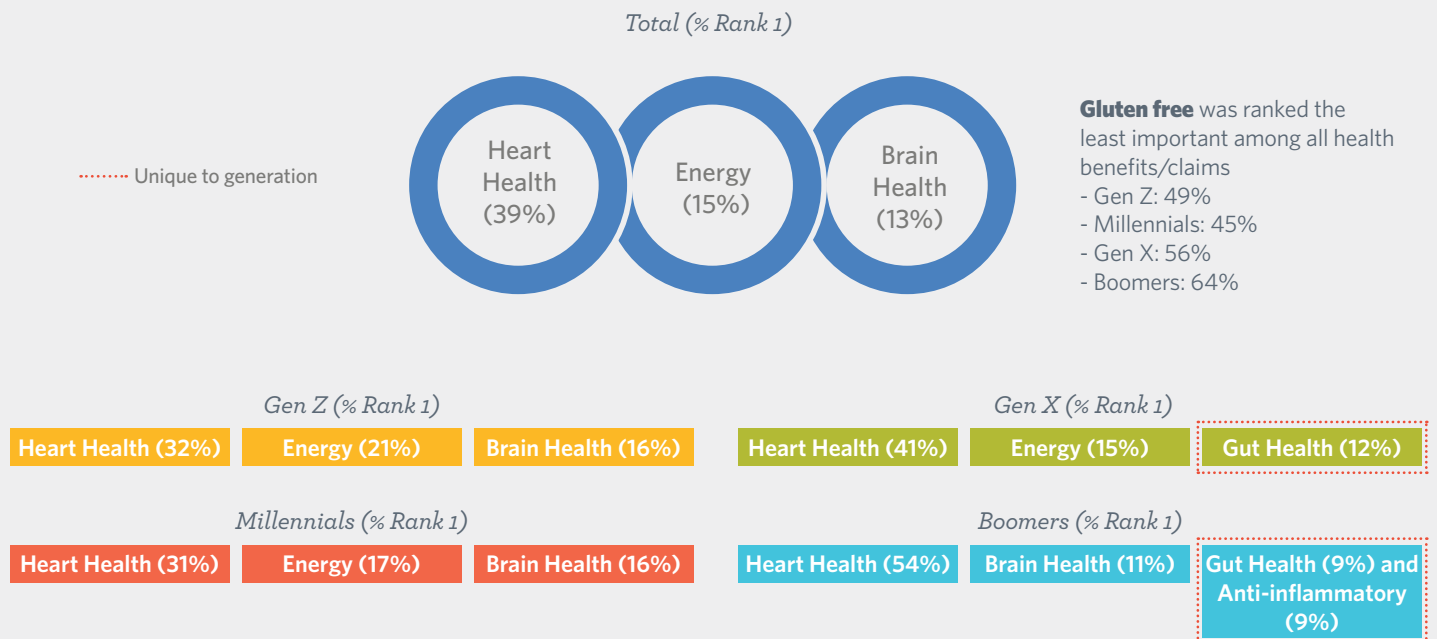
## REASONS FOR MINDFUL EATING



IF Q6=01 Q7: What lead you to make a change to be more mindful of what you eat? Select all that apply

With overall health and nutrition as the top reason for mindful eating, these consumers are more inclined to choose foods based on such positive nutrients as protein, fiber and whole grains (although reducing sugar is still a concern).

## MOST IMPORTANT HEALTH BENEFITS/CLAIMS



Q2: How important are the following health benefits/claims when making choices relative to food? Please rank, with 1 being the most important and 8 being the least important.

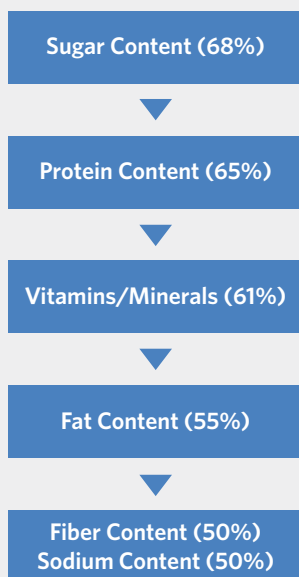




## MOST IMPORTANT INGREDIENTS/NUTRIENTS

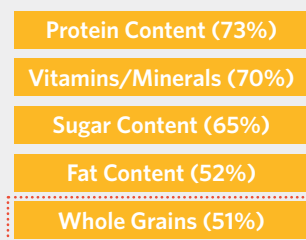
### Important Ingredients

Total (Top 5)

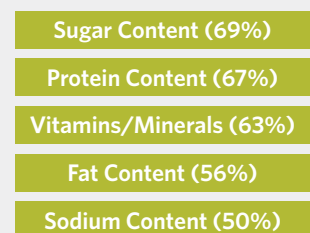


..... Unique to generation

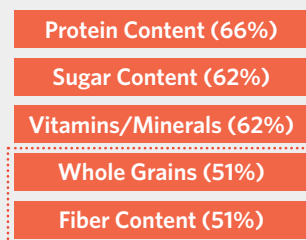
Gen Z



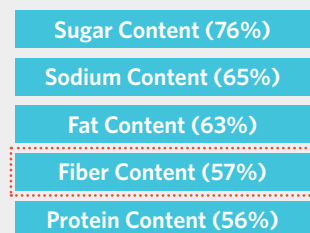
Gen X



Millennials



Boomers



Q3: Please select the TOP 5 most important ingredients/nutrients you consider when making choices relative to food?





# THEY'RE TAKING ACTION

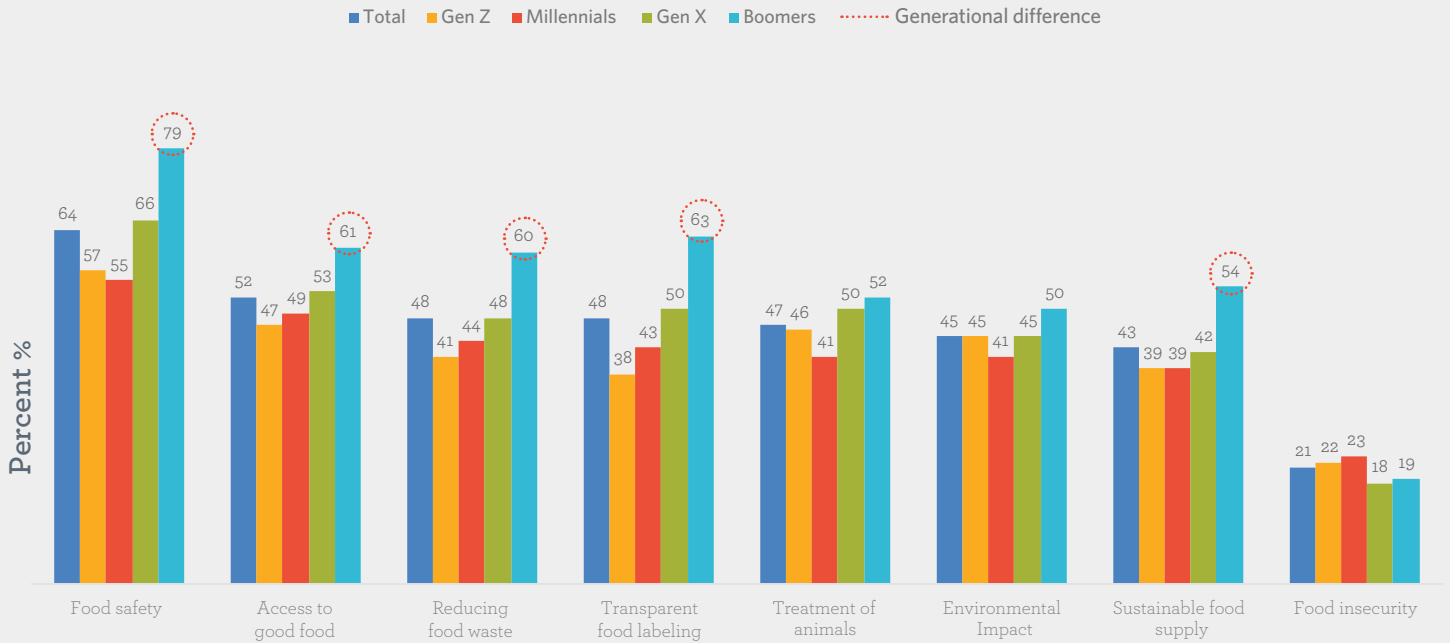
Gen Food wants to play an active role in supporting the greater good. In particular, they want to make a difference in promoting a more sustainable, responsible food supply. However, they don't always know what to do or where to start. Simple, tangible actions such as helping to reduce food waste can give them ownership of the need to protect the future of food for generations to come.

## MAKING A DIFFERENCE



Q29: How much do you agree with the following statements? TB: Strongly agree

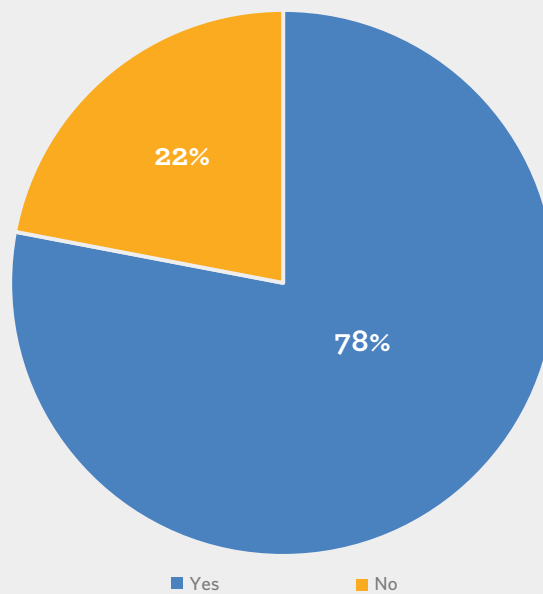
## WHAT THEY CARE ABOUT



Q24: Which of the following topics/trends do you care about?

## TAKING ACTION TO ADDRESS WHAT THEY CARE ABOUT

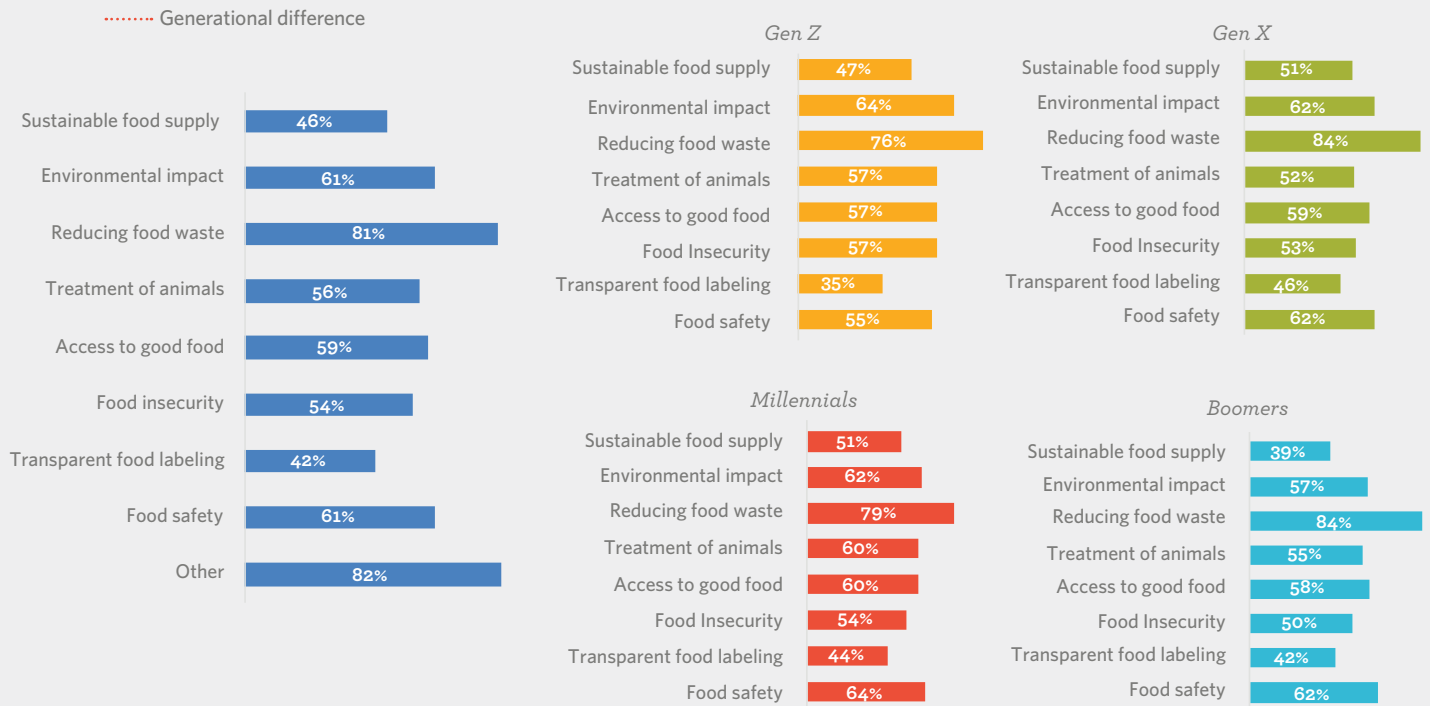
Across all issues



IF Q24=01-09 Q25: Do you take any steps or actions to address those topics/trends?

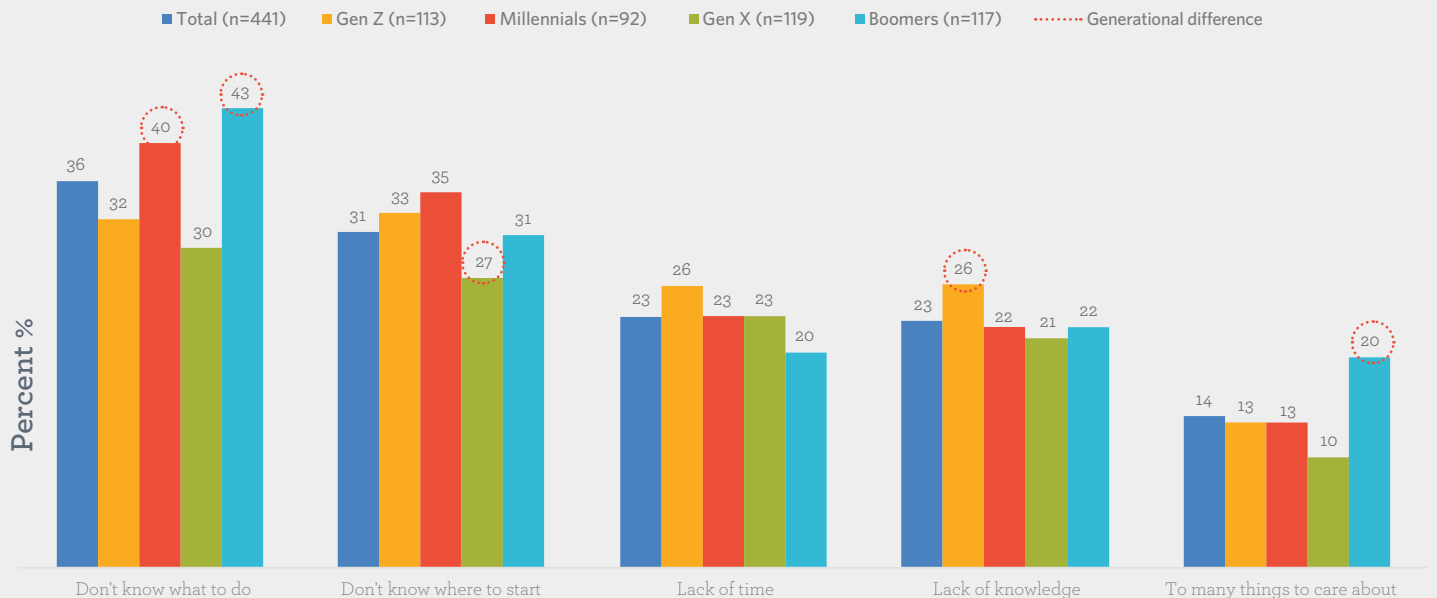


## TOP ISSUES ADDRESSED



IF Q24=01-09 Q25: Do you take any steps or actions to address those topics/trends? Yes ONLY

## REASONS WHY ACTIONS ARE NOT TAKEN



Note: calculated as total responses across all issues in each category over total possible responses (those who selected any issue and said they'd take no action)

IF Q25=02 Q27: Why are you not taking any steps or actions to address those topics/trends?

## RESEARCH METHODOLOGY

For this report, TRUE Global Intelligence™ conducted an online survey with 2,001 engaged consumers September 14-20, 2018, and evaluated drivers related to food, influences and behaviors. Respondents were screened for engagement on such factors as seeking information about food, sharing content about food and paying attention to ingredient lists.

### For a deeper dive into the full data set, contact:

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