Connecting with Gen Next Away From Home

2020 Fresh Start Conference

Presented by: Sharon Olson, Y-Pulse® Executive Director
Today’s Discussion

OBJECTIVES

Provide insight into the minds of kids, and the strategies of the foodservice professionals who feed them as it relates to food, nutrition, promotion and marketing.

STUDIES REFERENCED

- Connecting with Gen Next
- Understanding Tomorrow’s Tastemakers Today
- Fresh Perspectives Study
- Dining with K-12 Consumers
- Meal Innovation Lab

Y-Pulse® Kids’ studies began in 2006 with new studies every year to assess the evolution of food culture with young consumers. Studies include elementary, middle and high school students, college students and young adults.

Over a decade’s worth of research on tomorrow’s tastemakers.
Kids’ Food Culture

- Kids enjoy hanging out with friends at restaurants
- More than half of kids prefer to eat healthy
- Kids are gaining food autonomy through cooking media
Today’s food culture thrives on cultural contradictions:

- 89% of kids surveyed enjoy eating foods at restaurants that they don’t get at home
- 92% of kids order their favorite foods, something they are familiar with

Dining is an important social occasion for kids:

- 76% of kids like to hang out with their friends at a restaurant
- 66% of kids like restaurants that offer shareable food

Source: Y-Pulse® | Kids’ Dining
15 to 18 year-old kids attribute greater importance to the notion of community than 8 to 14 year-old kids. On average they consistently agree more on questions related to group membership and importance given to peer recommendations.
Eating at Home

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree A Lot</th>
<th>Agree A Little</th>
<th>Don't Know/Not Sure</th>
<th>Disagree A Little</th>
<th>Disagree A Lot</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer to eat my favorite meal</td>
<td>58%</td>
<td>34%</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>One of my parents prepares all the meals</td>
<td>55%</td>
<td>30%</td>
<td>4%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>I like to cook for myself</td>
<td>24%</td>
<td>34%</td>
<td>11%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>I like to cook for my family</td>
<td>24%</td>
<td>32%</td>
<td>12%</td>
<td>16%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: Y-Pulse® | Kids’ Dining
Eating at Home

- **2017**: 62% Love it, 31% Like it, 9% Other
- **2013**: 58% Love it, 39% Like it, 3% Other
- **2010**: 61% Love it, 24% Like it, 9% Other

Source: Y-Pulse © | Kids’ Dining
When surveyed regarding food autonomy, **15 year-olds** answered with the strongest confidence in their food choices and cooking skills. As kids grow older, they develop a stronger sense of independence when making decisions about food.
Eating at Home

Suggestions for improvement from those on the fence or those that do not like eating at home

“Mom needs to learn how to cook”

“Nothing, I’d rather eat out”

“Have a different cook”

93% of kids love or like eating at home, however, a small percentage of kids are on the fence (3%) or do not like eating at home (1%).

Source: Y-Pulse © | Kids’ Dining
I like to post about my restaurant experiences on social media

I try to cook some of the meals I see in "Tasty" videos on Facebook and Instagram

I like to watch "Tasty" style videos on Facebook and Instagram

I like to watch the Food Network

Source: Y-Pulse® | Kids' Dining
15 to 18 year-olds are more likely to consume, be influenced and participate in activities related to food media than 8-14 year-olds. Only 38% of 8-14 year-old kids agree that they like to share their restaurant experiences on social media, with an increase to 62% for the 15-18 group.

Source: Y-Pulse® | Kids’ Dining
Influence of Food Media

87% of consumers reported that a restaurant’s reviews are important in making dining decisions.

Young adult consumers depend on ratings and reviews before making their decisions when eating away from home.

Source: Y-Pulse © | Fresh Perspectives Study
Food Adventurous

Comparison between age groups 8-14 year-old and 15-18 year-old

I like to try new dishes and flavors

- 8-14 year old: 67%
- 15-18 year old: 77%

I like to try new items that are only available for a short time

- 8-14 year old: 60%
- 15-18 year old: 79%

As kids get older their sense of culinary adventure in trying new foods and responding to limited time offers increases.

Source: Y-Pulse® | Kids’ Dining
Young consumers are interested in healthy foods and they consider fresh to be synonymous with healthy.

- **80%** of consumers aged 18-34 reported that they are likely to purchase a healthy, single-serving snack, compared to **77%** of GenX respondents and **65%** of Boomers.
- **66%** of 8-18 year-olds say they prefer to eat healthy food.

Source: Y-Pulse © | Fresh Perspectives Study & Kids' Dining
Healthy Eating

<table>
<thead>
<tr>
<th>Biggest Similarities Between Age Groups on Ideas of Freshness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree that locally-sourced food is the freshest option</td>
</tr>
<tr>
<td>Trust certain brands to be fresh</td>
</tr>
<tr>
<td>Likely to order a menu item promoting fresh ingredients</td>
</tr>
<tr>
<td>Like salad bars that offer fresh ingredients</td>
</tr>
<tr>
<td>Consider seeing food being prepared a fresh factor</td>
</tr>
<tr>
<td>18-34</td>
</tr>
<tr>
<td>84%</td>
</tr>
<tr>
<td>86%</td>
</tr>
<tr>
<td>86%</td>
</tr>
<tr>
<td>87%</td>
</tr>
<tr>
<td>76%</td>
</tr>
</tbody>
</table>

Source: Y-Pulse © | Fresh Perspectives Study
Where Kids Like to Eat

Majority of kids like fast food restaurants

Home is their first choice in favorite places to eat

Kids are accustomed to a wide variety of commercial food venues

Source: Y-Pulse® | Connecting with Gen Next
Kids Favorite Food Venues

- Home: 94%
- Fast Food Restaurant: 92%
- Family member’s house: 89%
- Chain restaurant with servers: 88%
- Neighborhood restaurant with servers: 85%
- Shopping mall food court: 85%
- Friend’s house: 83%
- Movie theater: 82%
- Hotel on vacation: 80%
- Stadium/Sporting event: 65%
- Convenience store: 58%
- Supermarket restaurant: 52%
- Food truck: 48%
- School cafeteria: 48%

Source: Y-Pulse \( \text{©} \) | Kids’ Dining
Eating at Restaurants

Chain Restaurant with Waiter Service

<table>
<thead>
<tr>
<th>Year</th>
<th>Love it</th>
<th>Like it</th>
<th>Not Sure/Never Been</th>
<th>Don't like it</th>
<th>Hate it</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>37%</td>
<td>51%</td>
<td>8%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>56%</td>
<td>34%</td>
<td>8%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>67%</td>
<td>21%</td>
<td>7%</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Y-Pulse® | Kids' Dining
Eating at Restaurants

Local Restaurant with Waiter Service

<table>
<thead>
<tr>
<th>Year</th>
<th>Love it</th>
<th>Like it</th>
<th>Not Sure/Never Been</th>
<th>Don't like it</th>
<th>Hate it</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>45%</td>
<td>30%</td>
<td>16%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>40%</td>
<td>40%</td>
<td>16%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>36%</td>
<td>49%</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Y-Pulse ® | Kids’ Dining
Eating at Restaurants

Fast Food Restaurants

<table>
<thead>
<tr>
<th>Year</th>
<th>Love it</th>
<th>Like it</th>
<th>Not Sure/Never Been</th>
<th>Don't like it</th>
<th>Hate it</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>48%</td>
<td>45%</td>
<td>8%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>67%</td>
<td>26%</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>48%</td>
<td>22%</td>
<td>17%</td>
<td>9%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Y-Pulse® | Kids' Dining
8-14 year-olds are unfamiliar with certain types of food venues

- 66% have never eaten at Noodles & Company
- 57% have never eaten at P.F. Chang’s
- 48% have never eaten at a Food Truck
- 42% have never eaten at The Cheesecake Factory
- 40% have never eaten at Panda Express

Source: Y-Pulse® | Kids’ Dining
8-14 Year-Olds

OVER 90%

- Like eating at Home
- Like eating at Fast Food Restaurants
- Order their favorite foods, something they are familiar with
- Prefer to eat their favorite meal
- Like the food choices on the regular menu
- Like restaurants where they can get their order quickly
What Kids Like About Quick Service Restaurants

Great Place to Play
- “They have a toy”
- “Place to play”
- “Free wifi”

Healthy and Customizable
- “You get to choose a healthy way to make your sandwich”

Love the Food
- “I love tacos”
- “I love their pizza”
- “Lots of great food”

Source: Y-Pulse ® | Connecting with Gen Next
QSR Improvement Suggestions from Kids

“The food served there is unhealthy”
“Better tasting food”
“More menu choices”
“Put in a play area and have better toys in kids meals”
“Improve hygiene”
# Favorite Foods, Snacks and Beverages

## 8-14 Year-Olds

**OVER 90%**
- Eat pizza, chicken, pancakes/waffles, pasta/noodles, and sandwiches **as a meal**
- Eat fruit, candy, chips, and French fries **as a snack**
- Prefer drinking juice

**ADDITIONAL FAVORITES**
- 88% water
- 84% milk & soda

## 15-18 Year-Olds

**OVER 90%**
- Eat pizza, chicken, pancakes/waffles, pasta/noodles, tacos, burgers, breakfast sandwiches and sandwiches **as a meal**
- Eat fruit, candy, chips, and French fries **as a snack**
- Prefer drinking juice

**ADDITIONAL FAVORITES**
- 88% water
- 84% milk
- 83% soda

Source: Y-Pulse ® | Kids’ Dining
Meal Innovation Lab Exploration

- Y-Pulse chefs and dietitians developed meal concepts to explore with kids and their parents.

- Every item in the exploration met the current school foodservice guidelines although they were presented as menu concepts not associated with any particular type of foodservice venue to allow kids and their parents to make their own decisions on which types of foodservice venues they might expect to find these menu items.

Source: Y-Pulse® | Meal Innovation Lab
Top Scoring Menu Concepts – 8-14 year-olds

- **Banana Berry Smoothie**
  A creamy smoothie made with berries, banana, yogurt and milk, topped with fresh fruit and homemade granola

- **Overnight Oats**
  Creamy and hearty overnight oats in milk, layered with fresh fruit and yogurt, ready to grab on the go

- **Mexican Tostada**
  A crispy tortilla shell topped with refried beans, cheddar cheese, crunchy shredded romaine lettuce and diced tomatoes, drizzled with sour cream and lime

- **Tex-Mex Breakfast Bowl**
  A breakfast bowl with a blend of eggs, cheese, and beans served on top of roasted potatoes, peppers and onions, with salsa on the side

Source: Y-Pulse® | Meal Innovation Lab
Top Scoring Menu Concepts – 15-18 year-olds

82%

Banana Berry Smoothie
A creamy smoothie made with berries, banana, yogurt and milk, topped with fresh fruit and homemade granola

81%

Mexican Tostada
A crispy tortilla shell topped with refried beans, cheddar cheese, crunchy shredded romaine lettuce and diced tomatoes, drizzled with sour cream and lime

74%

Honey Sriracha Chicken Flatbread
A flatbread topped with mozzarella cheese, diced chicken, cherry tomatoes, fresh cilantro and drizzled with a delicious honey sriracha sauce

71%

Tex-Mex Breakfast Bowl
A breakfast bowl with a blend of eggs, cheese, and beans served on top of roasted potatoes, peppers and onions, with salsa on the side

Source: Y-Pulse® | Meal Innovation Lab
Top Scoring Menu Concepts – Adults

71%

Banana Berry Smoothie
A creamy smoothie made with berries, banana, yogurt and milk, topped with fresh fruit and homemade granola

55%

Overnight Oats
Creamy and hearty overnight oats in milk, layered with fresh fruit and yogurt, ready to grab on the go

70%

Mexican Tostada
A crispy tortilla shell topped with refried beans, cheddar cheese, crunchy shredded romaine lettuce and diced tomatoes, drizzled with sour cream and lime

62%

Tex-Mex Breakfast Bowl
A breakfast bowl with a blend of eggs, cheese, and beans served on top of roasted potatoes, peppers and onions, with salsa on the side

Source: Y-Pulse® | Meal Innovation Lab
Further Exploration – 8-14 year-olds

Buddha Bowl
A colorful quinoa bowl filled with edamame, red bell pepper, chickpeas, carrots, and baby spinach, dressed in a Thai peanut sauce

Apple Kale Salad
A kale and romaine lettuce salad topped with crunchy apples, celery, chickpeas, and sweet cranberries, tossed in a zesty Greek yogurt dressing

Jamaican Pulled Pork Tacos with Pineapple Salsa
Pulled Jamaican jerk pork seasoned to perfection served on a soft whole wheat tortilla and topped with pineapple salsa

Source: Y-Pulse © | Meal Innovation Lab
Further Exploration – 15-18 year-olds

**Buddha Bowl**
A colorful quinoa bowl filled with edamame, red bell pepper, chickpeas, carrots, and baby spinach, dressed in a Thai peanut sauce

**Apple Kale Salad**
A kale and romaine lettuce salad topped with crunchy apples, celery, chickpeas, and sweet cranberries, tossed in a zesty Greek yogurt dressing

**Spaghetti with Korean Meatballs**
Beef meatballs tossed in a spicy Korean sauce served on top of whole grain noodles

Source: Y-Pulse® | Meal Innovation Lab
Further Exploration – Adults

44%

Buddha Bowl
A colorful quinoa bowl filled with edamame, red bell pepper, chickpeas, carrots, and baby spinach, dressed in a Thai peanut sauce

44%

Apple Kale Salad
A kale and romaine lettuce salad topped with crunchy apples, celery, chickpeas, and sweet cranberries, tossed in a zesty Greek yogurt dressing

49%

Jamaican Pulled Pork Tacos with Pineapple Salsa
Pulled Jamaican jerk pork seasoned to perfection served on a soft whole wheat tortilla and topped with pineapple salsa

Source: Y-Pulse® | Meal Innovation Lab
What's Next

Food is an important aspect of social events

Consumers value seeing everything on display, along with customizable and fresh options

Consumers value flexible ordering and connection with the vendor
Questions and Conversation

FOR MORE INFORMATION

info@ypulse.org
445 W. Erie St. Suite 105
Chicago, IL 60654
312.280.9061
www.ypulse.org