September 2019

Future Consumer: Food and Generation Z

Rapid Evidence Assessment

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Abstract

The Food Standards Agency commissioned a Rapid Evidence Assessment (REA) into ‘Generation Z’ (current 16-25 year olds), exploring their values and consumption patterns, and attitudes and behaviours around food. 112 sources were included in the review, including 37 peer-reviewed articles and 75 grey literature sources. Much of the literature focuses on the attitudes and digital behaviours of Gen Z.

There is limited evidence about this generation’s food related attitudes and behaviours, though it appears that Gen Z are eating a typically ‘teenage diet’. At the same time, obesity among this age group is flat-lining, and reported consumption of alcohol is decreasing. The evidence does not show a sharp increase or decrease in vegetarianism or veganism among this generation, compared to millennials. However, there are very few longitudinal studies available and claims and evidence about this ‘generation’ are usually based on cross sectional studies, meaning it is often not possible to distinguish between cohort, life stage and period effects.

Executive Summary

Methodology

The Food Standards Agency commissioned BritainThinks to conduct a Rapid Evidence Assessment (REA) of Generation Z (current 16-25 year olds), exploring their values and consumption patterns, and attitudes and behaviours around food. A systematic search was conducted of peer-reviewed articles and published national and international research reports. Sources were identified on the basis that they were published in 2015 or later, and using search terms agreed in advance to identify studies about Generation Z (referred to as ‘Gen Z’ from this point onwards). A total of 112 studies were included in the review: 37 peer-reviewed studies, 62 commercial/marketing reports and 13 think tank reports. Sources were reviewed using an analysis grid, that recorded information about methodology, methods and findings in relation to the REA’s aims and questions.

Summary of evidence

Evidence about Gen Z is relatively thin – there are few peer-reviewed sources available, meaning the REA relies heavily on grey literature, often with a branding and marketing focus. Research about this audience predominantly focuses on their attitudes, digital behaviours and consumption habits. Aside from the FSA’s own data there is comparatively little evidence about Gen Z’s food attitudes and behaviours or how these compare to previous generations.

Who are Gen Z, and what do they care about?

- While there is no single accepted definition of Gen Z, the most commonly used definition among sources reviewed includes anyone born after 1995. While Gen Z appear to share similar concerns to the rest of the population, they do appear to have a strong sense of social responsibility. Specifically, they tend to prioritise gender equality, diversity and LGBT equality more than previous generations.

- Gen Z are more likely to say they care about the environment compared to other generations, though there is a relatively small difference between their views and those of Millennials. While Gen Z have strongly stated beliefs, these do not necessarily translate into action – for example, they do not necessarily recycle despite expressing their environmental concerns.
- One hypothesis about Gen Z is that social media creates pressure to have the ‘right’ opinion – meaning this group may be more likely to express views that are in line with social norms. However, there is not strong evidence that this is a cohort effect.
- Gen Z are often characterised as a ‘fluid’ generation. They are less likely to identify as heterosexual or with gender binaries than older generations are. Gen Z are also perceived to have more ‘hybrid’ identities than older generations, though this claim is weakly evidenced.

The first ‘true digital natives’

- Unsurprisingly, Gen Z are spending more time online than older generations. They also spend more time communicating online than watching content, and are moving away from Facebook toward other social media channels.
- YouTube is an increasingly important channel for Gen Z and reflects a changing relationship with media consumption, with young people creating as well as consuming online content.
- A commonly cited claim about Gen Z is that their increased Internet use has led to them having shorter attention spans, but there is no evidence to support this.
- Socio-economic differences across online usage are important, with some evidence suggesting Gen Z from lower socio-economic backgrounds spend more time online for example, though the impact of this is not well understood.
- Gen Z are conscious of the impact technology has on their lives, with many trying to limit time online and on social media.

Consumption Trends

- Findings about consumption trends come entirely from grey literature, and there is very limited data available about Gen Z's reported or actual purchasing behaviour – most of the research focuses on stated preferences. As such, these findings should be treated with particular caution.
- Gen Z appear to have a preference for individualised and unique products, and for experiences over material goods, though these findings are not based on UK studies.
- Social media, online 'influencers' and online marketing all appear to be influences on purchasing decisions among Gen Z.
- Online shopping is commonplace among Gen Z, yet the majority of Gen Z actually state a preference for buying in-store and high street shopping. Marketing reports also suggest that Gen Z are open towards 'innovative' forms of consumption, such as voice-activated purchasing.

Food attitudes and behaviours

- Gen Z appears to be eating a 'typically teenage' diet, with relatively low intake of fresh fruit and vegetables and relatively high intake of pre-packed sandwiches, ready meals and burgers. Existing evidence suggests that this is due to life stage effects.
- While Gen Z are more likely to be vegetarian than those age 55+, they are less likely to be vegetarian or flexitarian compared to those aged 25-34 and 35-44. Gen Z and Millennials are also slightly more likely to be vegan than older age groups. However, differences between Gen Z and Millennials are not large enough to draw robust conclusions.
- Eating out, takeaways and fast food are common among Gen Z, with reported takeaway consumption the highest among those from lower income households. Across Gen Z, ability and willingness to cook is the lowest compared to other age-groups, however, these are trends that are likely to be influenced by life stage.
- Evidence suggests that levels of obesity are flat-lining among some age groups, and that obesity levels among Gen Z today are the same as for

Millennials in 2003. While evidence about the causes of this is limited, there is some indication that this might be linked to a decrease in sugar consumption.

- Evidence about the drivers of food choice among this audience is limited, but the evidence that does exist points to price being a strong influence on food purchase decisions, and a more important a factor compared to other age groups. Gen Z also say that social media is an influence on their decisions about where to eat.
- Gen Z are drinking less alcohol than previous generations. It is not clear what is driving this, but suggestions include that Gen Z sees drinking as riskier and that they are concerned about their online image. This trend supports wider evidence that Gen Z engage in less 'risky' behaviours than past generations of young people, with downward trends in smoking, drinking and teenage pregnancy, hence the label 'Generation Sensible'.

1. Introduction

1.1 Background

Research into Gen Z

BritainThinks, an independent research agency, was commissioned by the Food Standards Agency (FSA) to conduct research to better understand "Generation Z" (Gen Z) and the ways in which they engage with the food system. The overarching aims of the research are to explore:

1. How 16-25 year olds engage with information about food and the food system, and how they share information;
2. How 16-25 year olds make decisions about food, how they communicate about food, and the extent to which these elements interact;
3. How 16-25 year olds think and feel about the food system, including the values, aspirations, hopes and concerns they have about the food system;
4. How 16-25 year olds differ from other consumers / past generations in terms of their food behaviours and attitudes.

This Rapid Evidence Assessment (REA) is the first stage of a wider programme of research into Gen Z which will address the objectives above, through a mixed-method programme of primary research. This review aimed to assess the existing evidence about this generation, and to identify the gaps which would benefit from further exploration in the primary research. This evidence review is being conducted by BritainThinks in partnership with Dr Rebecca O'Connell, of the UCL's Institute of Education.

1.2 REA research objectives

The specific objectives of the REA are as follows:

- Identify existing hypotheses around Gen Z in terms of their values, beliefs and behaviours;
- Identify existing evidence around Gen Z and the food system, with a particular focus on evidence that could be pertinent to informing the design of the research programme;
- Identify gaps in evidence that the research programme should aim to fill.

1.3 Methodology

This REA focuses on empirical research, predominantly from the UK, and includes two main types of evidence, dating from 2015 onwards:

A. Peer-reviewed articles;

B. Published national and international research reports.

Peer-reviewed articles were mainly identified using the UCL Explore Tool, a search tool that provides access to a wide range of over 600 general and subject specific databases. It allowed search terms to be specified as 'title', 'subject' or 'any field', and has an and/or function. It also identified publications by type, including peer-reviewed articles. Published reports of non peer-reviewed UK empirical research were identified using four main approaches:

1. Google, particularly for ‘grey’ literature and market research. This included a review of the major research and polling companies to establish existing polling data that may be relevant;
2. FSA published research and expert recommendations;
3. Relevant news articles on UCL Explore. These were mostly based on press releases about the publication of new evidence, including market research and non peer-reviewed research;
4. Snowballing (following up promising references include in reviewed sources).

Specific search parameters for both types of evidence were set out through discussion with BritainThinks, Dr O’Connell and the FSA, and were designed to be systematic, so as to capture relevant literature that may refer to the Gen Z age group by other proxies. Broadly, sources were identified using the following criteria:

- Years: 2015-2019; Searches restricted to ensure that REA relates to current cohort of Gen Z.
- Subject: Generation Z, generations, young adults, youth, young people, university students, digital natives;
- Topics: defining Generation Z, values and beliefs, online and social media behavior, consumption behavior, food attitudes and behaviours, food purchasing, dietary intake, ethical food values.

The searches identified a high number of peer reviewed articles, commercial/marketing reports and think tank reports, which were then checked for relevance to the objectives of the research. Sources that were identified as relevant were then compiled into a longlist, of which those judged to be relevant according to the aims of the REA were then selected for full review. For the review, these sources were recorded in an analysis ‘grid’ noting the key findings and contextual information relevant to assessing the robustness and relevance of the study, such as place and year of data collection, methodology, methods and sample size.

In total, in the course of conducting this REA, 112 sources were reviewed, including;

- 37 peer reviewed academic studies;
- 62 commercial/marketing reports from consultancies and market research agencies;
- 13 think tank reports.

1.4 Context

The attitudes and values of young people are ‘often seen as foretelling the future and are regarded as important agents of social and political change’[1]. Gen Z have grown up in a specific set of circumstances, which are the starting point for hypotheses about them. The increased presence and rapid transformation of media in everyday life and society more generally over the last century has led to a recognition of the role of media in the formation of generations[2]. Gen Z are said to be the first truly ‘digital natives’, growing up with the internet and social media as inherent to their lives, living, working and socialising on it. A lot of the ‘hype’ around them is generated by brands, who are particularly interested in Gen Z’s online lives, and how to use this as an access point to sell them products.

Gen Z have also grown up in more constrained economic circumstances than older generations. Since 2008, their lives and transitions to adulthood have been affected by the financial crisis and the austerity that resulted from it, with cuts to services across the board including youth services. Many of them are also reaching working age with the start of the ‘gig economy’ and casual labour on the rise, especially for young people. Adding to that economic outlook is the rise in university tuition fees, which came into force before the youngest of Gen Z started attending university. Gen Z have grown up in a predominantly Conservative political era in the UK, with

[1] Loader, B., and others. ‘The networked young citizen: social media, political participation and civic engagement’. Information, Communication & Society. Pages 143-150. (2014)
[2] Bolin, G. ‘Media generations: Experience, identity and mediatised social change’. Routledge. (2016)

nationalism on the rise. Though they themselves have often inhabited increasingly diverse communities and are recognised to be 'networked young citizens', their opportunities are often limited by growing social inequality[3].

When it comes to understanding Gen Z's attitudes and behaviours towards food, it is also important to consider that Gen Z have grown up in an age of various government campaigns aimed at promoting healthy eating, including the 'Change 4 Life' and '5-a-day' campaigns. As well as the introduction of campaigns promoting healthy eating, the UK Government also introduced a sugar tax, otherwise known as the 'Soft Drinks Industry Levy', which came into effect on the 6th April 2018.

Combined, this context provides important background in helping hypothesise what underlies some of the attitudes and behaviours that characterise Gen Z.

1.5 A note on generational research

The idea of generations and generational shifts has popular resonance that is reinforced by attention grabbing media reports. 'Generation' has long been recognised in market research as a valuable way of segmenting consumers. Generational research aims to understand age-specific communities and the impact of the economic, political and technological environment in which grew up on their attitudes and behaviours[4]. Researchers find generational categories a useful tool to analyse why views change over time, and how age-specific worldviews may predict what will change in the future[5]. However, it is recognised that generational research also has its limitations. A report by a market research organisation in the UK points out that often, generational research is conducted with the aim of getting headlines

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[3] Loader, B., and others. 'The networked young citizen: social media, political participation and civic engagement'. Information, Communication & Society. Pages 143-150. (2014)
[4] Nokes, C. and others. 'A generation without borders: embracing generation Z.' OC&C Strategy. (2019)
[5] Dimock, M. 'Defining generations: Where Millennials end and Generation Z begins'. Pew Research Center. (2019)

rather than providing robust insights, leading to faulty clichés and stereotypes being perpetuated and tainting the perception of a whole cohort[6].

There is also some academic criticism of research that claims to be 'generational'. The concept of 'generation'[7] and the linked concept of 'cohort'[8] have a strong basis in sociological theory[9]. However, it has been argued that generational, period and age effects are frequently conflated and that empirical evidence for generational differences and 'cut offs' is often lacking[10]. According to a recent review, one challenge in researching generational change is a lack of suitable data[11]. In cross-sectional surveys it is not possible to distinguish between age, period and generational effects. In addition, longitudinal studies, of which there are few, are time-consuming and resource-intensive and necessarily focus on particular topics (e.g. health) to the exclusion of others. Furthermore, studies 'must be large and statistically significant enough to overcome other characteristics (gender, ethnicity, nationality etc), period effects and ageing effects' to demonstrate that generation is a significant dimension on which to differentiate values, attitudes, and outcomes[12]. In this context it is more common to compare groups based on somewhat arbitrary birth dates. Whilst this approach is not in itself invalid, it is important to recognise the limitations of any claims that can be made from such studies about the nature or causes of social change.

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[6] Duffy, B. and others. 'Beyond Binary: The Lives and Choices of Gen Z'. Ipsos Mori. (2018)
[7] Mannheim, K. 'The problem of generations, in P. Kecskemeti (1952) Essays on the sociology of knowledge by Karl Mannheim'. Routledge & Kegan Paul. Pages 276-320. (1952)
[8] Ryder, N. 'The cohort as a concept in the study of social change'. American Sociological Review. Pages 843-61. (1965)
[9] Nilsen, A. 'Cohort and generation: concepts in studies of social change from a lifecourse perspective'. Families, Relationships and Societies. Pages 475–79. (2014)
[10] Parry, E. and Urwin, P. 'The evidence base for generational differences: Where do we go from here?' Westminster Business School. (2017)
[11] Reeves, T. 'Generational Differences'. University of Georgia. Pages 296-302. (2007)
[12] Reeves, T. 'Generational Differences'. University of Georgia. Pages 296-302. (2007)

As a result of these limitations, we have exercised caution about the claims made about Gen Z throughout this REA. Where possible, this has been done in two main ways:

- Considering and commenting on the scope, strength and validity of evidence available;
- Carefully assessing whether findings indicates a true generational effect (where a cohort has different views and these stay different over time), a period effect (where attitudes of all cohorts change in a similar way over the same time period), or a life-stage effect (where change in attitudes stem from a change in life stage or life event)[13].

1.6. An overview of this report

This report summarises the finding of the REA. The report has four main chapters, summarised below.

Chapter 2: Gen Z: Who are they?

- This chapter addresses claims that Gen Z are ‘Generation Sensible’, that they are a more ‘fluid’ generation, and the extent to which they are supported by evidence.
- It also identifies evidence that speaks to any common features of Gen Z’s identity, and the values, priorities and concerns they share.
- Finally, we discuss misconceptions about Gen Z, and what Gen Z think of these.

[13] Duffy, B. and others. ‘Beyond Binary: The Lives and Choices of Gen Z’. Ipsos Mori. (2018)

Chapter 3: Digital Natives

- This chapter discusses claims that Gen Z are uniquely impacted by the technological environment they have grown up in, including often-cited claims that social media makes them lonely and that it has reduced their attention spans.
- This chapter also reviews the available evidence on Gen Z's relationship to digital technology and the implications of this, as well as how their digital habits compare with older generations.

Chapter 4: Consumption Trends

- This chapter discusses claims about consumption amongst Gen Z.
- This chapter first examines general trends that may be influencing their consumption, and then also examines the role of social media and online shopping on the shopping habits of Gen Z.

Chapter 5: Food Attitudes and Behaviours

- This chapter examines the food attitudes and behaviours of Gen Z.
- The chapter starts by addressing what Gen Z are currently eating, before looking at where they eat.
- The chapter then also explores the relationship between what Gen Z are eating and the impact this has on their health.

2. Gen Z: who are they?

In this section we discuss Gen Z's identity, and the values they share. We begin with a definition of Gen Z (2.1). We then discuss the behavioural trends that have earned them the label 'Generation Sensible' (2.2), the extent to which they are a 'fluid' generation (2.3.), their priorities (2.4) and misconceptions about Gen Z (2.5).

2.1 Who are Gen Z?

Gen Z are sometimes known by other names including Digital Natives, post-Millennials and iGeneration, and while there is no single accepted definition of Gen Z, the most commonly used definition among sources reviewed includes anyone born after 1995 (at the time of writing, those aged 24 and under). This broadly tallies with the most common definition of Millennials as those born between 1983 – 1994 (25-35 year olds). However, the precise cut-off date for inclusion in Gen Z varies: for example, McKinsey defines Gen Z as those born 1995-2010 (10-24 year olds)[14], while Deloitte defines it as those born 1995 – 2002 (16-25 year olds)[15]. Recently researcher Mark McCrindle coined the term 'Generation Alpha' to describe the cohort of people born in 2010 onwards, which would suggest Gen Z are those born between 1995 and 2010 (those between 9 and 24 years old at the time of writing)[16].

This REA follows the definition of Gen Z as the current 16-25 age group, which means that the REA excludes research related children who are currently school age.

2.2. 'Generation Sensible'

Gen Z are less likely than older generations to display the 'risky' behaviours and attitudes that adolescents and young people are usually known for. They are less

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[14] Francis, T. and Hoefel, F. 'True Gen': Gen Z and its implications for companies'. McKinsey & Company. (2018)
[15] Deloitte, 'The Deloitte Global Millennial Survey 2019', Deloitte, (2019)
[16] Turk, V. and others 'Understanding Generation Alpha'. Wired Consulting. (2018)

likely to smoke, drink or take drugs, and teen pregnancy rates are in decline. Some studies suggest they are particularly cautious with money. Combined, these features of Gen Z mean they are often labelled 'Generation Sensible'. However, evidence also suggests this may be as a result of economic factors and the policy measures designed to impact these behaviours, more so than any distinct attitudes present among Gen Z.

Gen Z are smoking and drinking less than any past generation in the UK

In the UK, it is notable that young people are smoking cigarettes less than this age group did in the past. According to a representative National Health Service (NHS) survey of 5,000 pupils, in 2013 less than one in five 11- to 15-year-olds said they had smoked[17]. This is the lowest for this age group since records began in 1982, and half the number that said they had smoked in 2003[18]. Some evidence suggests this is linked to a 'sensible' attitudinal shift smoking, with the number of 11-15 year olds saying 'it is OK to smoke once a week' dropping from 25% in 2003, to 13% in 2003[19]. Somewhat conflicting evidence suggests Gen Z are in fact less likely to see smoking as high-risk than Millennials (70% compared to 76% of Millennials in 2004, according to Ipsos' Youth Omnibus, which also surveyed 11-15 year olds)[20]. The Ipsos source relies on small base size of 30 school age pupils, making it less reliable, although it also found that (aside from binge drinking), young people are also less worried about other 'risky' behaviours. The conflict between these two sources might suggest that perception of risk is not the only factor in the fall in smoking. The NHS study also notes that the price of tobacco had increased eight-fold between 2003 and 2013, making it 22% less affordable for young people –

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[17] NHS. 'Smoking, drinking and drug use among young people in England – 2013'. NHS Digital. (2013)
[18] NHS. 'Smoking, drinking and drug use among young people in England – 2013'. NHS Digital. (2013)
[19] NHS. 'Smoking, drinking and drug use among young people in England – 2013'. NHS Digital. (2013)
[20] Duffy, B. and others. 'Beyond Binary: The Lives and Choices of Gen Z'. Ipsos Mori. (2018)

suggesting that cost could also be an important influence of this downward trend in smoking[21].

Frequent reports in national news media suggest Gen Z are drinking less than young people ever have. In England in 2013, according to the same NHS study, 38% of 11-15 year olds had tried alcohol at least once, which was also the lowest proportion since records began[22]. As with smoking, it represents a continuous downward trend. In 2013, 9% of 11-15 year olds said they had drunk alcohol in the last week, compared to 25% in 2003[23]. Dynamics of this trend are explored in chapter 5, including the popular idea that causes of this decline are related to 'social media anxiety' in Gen Z. Qualitative research with 14-17 year olds in Scotland suggests that young people use alcohol brands to develop their desired identities and that these acts of consumption extend to young people's profiles on social media[24]. However, a report from the Institute of Alcohol Studies, which reviewed published research on this trend, finds there is little support for many of the popular hypotheses which seek to explain changes in drinking behaviour, suggesting the reduced affordability of alcohol is more likely to be the main cause. While evidence does not conclusively point to Gen Z's attitudes being a causal factor, the acceleration in the trend at this particular time does suggest the need for further research into the relationship between Gen Z's attitudes and the decline in drinking.

Teen pregnancy rates have also fallen dramatically in the last 20 years

[21] NHS. 'Smoking, drinking and drug use among young people in England – 2013'. NHS Digital. (2013)
[22] NHS. 'Smoking, drinking and drug use among young people in England – 2013'. NHS Digital. (2013)
[23] NHS. 'Smoking, drinking and drug use among young people in England – 2013'. NHS Digital. (2013)
[24] Purves, R., and others '"I Wouldn't Be Friends with Someone If They Were Liking Too Much Rubbish": A Qualitative Study of Alcohol Brands, Youth Identity and Social Media'. International Journal of Environmental Research on Public Health. (2018)

Teen pregnancy in the UK is also in stark decline. In 2016, teenage conception rates in England and Wales had fallen by 55% since 1998, and by 50% since 2007[25]. A report which explored contextual factors hypothesises that trends towards socialising 'on-screen' and away from 'risk-taking' behaviours, such as binge drinking and unprotected sex, may be among the causes. However, it acknowledges that improved access to contraception and sex and relationships education are likely to make important contributions to this trend.

Gen Z are labelled 'sensible spenders'

Gen Z are also said to be cautious with money. They have been labelled 'sensible spenders', with an international study of 15,500 Gen Z finding 35% are regularly saving for big purchases and 12% are already saving for retirement, though the report does not compare Gen Z's saving habits with older generations[26]. They have also been labelled the 'stay-at-home' generation, with forms of indoor, online socialising on the rise, perhaps linking to a tendency to be selective about spending money[27]. The 'stay-at-home' label is particularly popular with alcohol marketers, who are trying to adapt to this new trend[28]. However, we found no evidence to suggest this reflects an attitude distinct to this cohort as opposed to being related to age or limited budgets. It is important to understand this reticence to spend in the context of the world in which they grew up – and indeed we see in section 2.4 that Gen Z are highly pessimistic about their economic futures.

[25] BPAS, 'Social Media, SRE, and Sensible Drinking: Understanding the Dramatic Decline in Teenage Pregnancy', British Pregnancy Advisory Service, (2018)
[26] Nokes, C. and others. 'A generation without borders: embracing generation Z.' OC&C Strategy. (2019)
[27] Burnie, A. 'Gen Z Attitudes Towards Booze Forcing Brands to Change Their Marketing Tactics.' Red Brick Road. (2019)
[28] Burnie, A. 'Gen Z Attitudes Towards Booze Forcing Brands to Change Their Marketing Tactics.' Red Brick Road. (2019)

2.3. Gen Z are labelled the most 'fluid' generation

Gen Z are less likely to identify as heterosexual, and are less likely to have binary gender identities

Gen Z are described as a more 'fluid' generation in a number of aspects, particularly in regards to their sexual orientation and gender. In the UK, a 2017 survey of 3,000 15+ year olds found only two thirds (66%) of Gen Z define as exclusively heterosexual, and less so than Millennials (71%)[29]. Another 2017 survey of 1,000 16- and 17-year olds found male teens were more likely than female to identify as 100% straight (69% compared to 56%)[30]. With eight out of ten identifying as 100% male or female, the same survey suggests younger people are more 'gender fluid', although it does not show clear comparisons with older age groups. The same survey suggests younger people do appear to be more accepting of gender fluidity. Almost half of 16- and 17- year olds (48%) agree that the idea that everyone is a man or a woman is out of date, compared to just over a third (36%) of adults aged 18 and over[31]. This trend extends beyond the UK, and in the US in 2016, 56% of Gen Z knew someone who goes by gender-neutral pronouns, compared to 43% of those aged 28-34[32]. The data does suggest that younger people are more open to expressing non-binary gender identities and sexual orientations, though there are some interesting gender differences which would be worth exploring further.

Gen Z are said to have 'hybrid' identities, made up of different parts, rather than single defining markers

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[29] Duffy, B. and others. 'Beyond Binary: The Lives and Choices of Gen Z'. Ipsos Mori. (2018)
[30] Nationals Citizen Service. 'Sexuality – Seriously, what's the big deal?!' National Citizen Survey. (2016)
[31] Nationals Citizen Service. 'Sexuality – Seriously, what's the big deal?!' National Citizen Survey. (2016)
[32] RPA. 'Identity Shifters' RPA. Pages 21-24 (2016)

Gen Z is also said to have ‘hybrid’ identities, with reports describing the different components of identity – such as cultural preferences or ethnic background – which Gen Z choose to emphasise at different moments. As one market research report based on worldwide polling puts it, ‘they don’t define themselves in only one way’[33]. These kinds of characterisations of Gen Z tend to come from qualitative studies, including those with an ‘ethnographic’ component, which are carried out by brand-focused agencies. One report from a marketing agency followed twelve Gen Z young people in the UK, drawing the conclusion ‘they don’t see themselves in binary terms anymore – they can be many things all at once’[34]. The report showed how young people, specifically ‘trend setters’, are savvy in navigating different identities. While the selection of ‘trend setters’ means the findings are unlikely to be representative of the whole cohort, another study in the US was more wide ranging, drawing on focus groups, surveys and ‘ethnography’ to conclude that ‘identity shifting’ is the defining feature of Gen Z:

> *“They play up different parts of their identity based on who they're with at the time, and how they want to be perceived. Gen Z doesn’t see this as being disingenuous—it’s just a natural part of interacting with multiple ‘audiences’.”*[35]

For example, the study suggests that the decline of mainstream popular culture means that culture for Gen Z is no longer a shared ‘zeitgeist’, but a chosen view of the world, which they piece together from the endless content that is available to them online, across an ever greater choice of platforms. The study also claims that this generation is particularly multicultural, with more racial diversity and more ‘overlap in cultures’. The authors argue this makes personal identity particularly complicated for many Gen Z, with additional challenges of ‘fitting in the box’, in different social scenarios meaning they ‘play up or push down’ different aspects of

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[33] Francis, T., and Hoefel, F. ‘True Gen’: Gen Z and its implications for companies’. McKinsey & Company. (2018)
[34] We Are Social. ‘We are Gen Z: Their power and paradox’. We Are Social. (2017)
[35] RPA. ‘Identity Shifters’ RPA. Pages 21-24 (2016)

their identity depending on what feels appropriate. The sources do provide some convincing evidence that Gen Z's identity is 'hybrid' in the sense of piecing together different markers of identity, as well as by choosing to emphasise these according to the situation. However, without offering a generational comparison or longitudinal research, it is unclear from the sources whether this marks a decisive shift in the way Gen Z perceive their identity, or whether these statements about Gen Z could in fact be applied to anyone. Moreover, the idea that people draw on a range of markers of identity, and that it is performative and situated is well documented in the anthropological and sociological literature and therefore may not necessarily be particular to this group[36] [37] [38]. It's important to note, however, that whether or not this is a genuine cohort shift, the idea that Gen Z have particularly 'hybrid' and 'fluid' identity is popular in the brands and marketing sphere, and likely has a strong influence in the way Gen Z are targeted by them as consumers.

Fluidity is thought to be linked to internet use

The claimed 'fluidity' of Gen Z identities is said to be linked to their internet use. One multi-method US study, for example, which included focus groups, social media analysis and mobile ethnography, suggests social media allow young people to emphasise different aspects of themselves depending on what they feel like, from the 'realness' of Snapchat, to the 'feigned perfection' of Instagram[39]. Fluidity is also said to be linked to growing up with 'fake news', or at least with access to multiple sources of news and information, rather than reliance solely on a limited number of authoritative outlets. A marketing research report based on an ethnographic study of 12 Gen Z young people in the UK provides an example of a young woman responding to the exclusion of black histories from her curriculum, by educating

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[36] Giddens, A. 'The constitution of society: Outline of the theory of structuration'. Polity Press. (1984)
[37] Goffman, E. 'The presentation of self in everyday life'. University of Edinburgh. (1957)
[38] Jenkins, R. 'Social Identity' Routledge (2008)
[39] RPA. 'Identity Shifters' RPA. Pages 21-24 (2016)

herself with resources she found online instead[40]. It is also argued that popular culture has become more 'niche' and less mainstream as a result of the internet. For example, one study of 500 young women aged 13-22 the US found that 97% of Gen Z females claim they regularly listen to at least five different music genres, which is reported to reflect the increased access Gen Z has to different platforms online[41]. In these sources, the idea of fluidity is linked to Gen Z's interaction with the internet. However, the examples given are not particularly compelling or convincing and thus the evidence does not seem particularly strong. Moreover, our searches did not find any studies that drew comparisons between Gen Z and older generations in this respect. This will be dealt with in more depth in chapter 3.

2.4 Gen Z's priorities

Gen Z's main political concerns are broadly in line with those of older generations, with the NHS being the major shared concern. However, there are some generational differences, with Gen Z more likely to be supportive of gender equality, diversity and LGBT equality. Gen Z are also supportive of the need to protect the environment, though levels of support fluctuate. Gen Z, along with Millennials, appear to have a more international outlook than older generations, and appear to be more worried about their economic futures and local and global political situations. Evidence suggests however that Gen Z's strong stated beliefs do not often translate into action, with some evidence also pointing to a context where Gen Z are worried for being 'called out' for having opinions which diverge from the social norm.

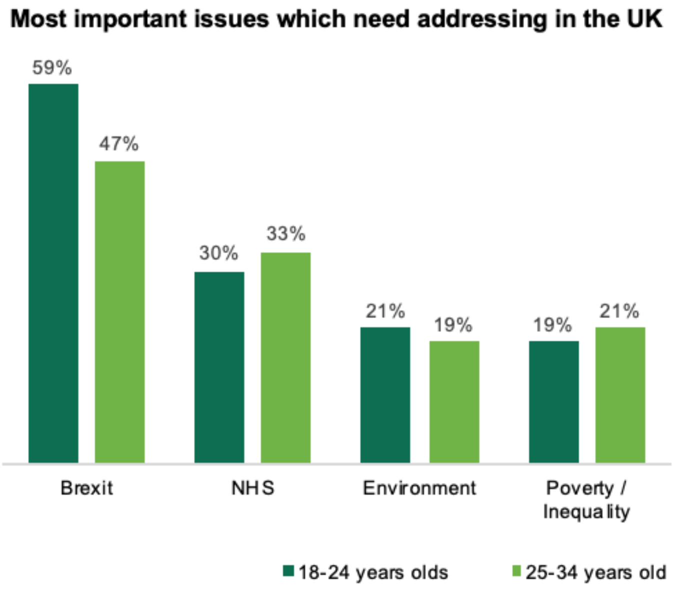
Gen Z has a strong sense of social responsibility

[40] We Are Social. 'We are Gen Z: Their power and paradox'. We Are Social. (2017)
[41] Hodak, B. 'New Study Spotlights Gen Z's Unique Music Consumption Habits'. Forbes. (2018)

A consistent finding from a number of surveys is that Gen Z's main political concerns are similar to those of older generations in the UK. When asked which are the main issues to be addressed in Britain today, a 2017 poll of 3,000 16+ year olds including 1,000 Gen Z (16-22 year olds) shows that, in line with older generations, the top priority of 16-22 year olds is improving the NHS, preventing terrorism and making the economy work after Brexit[42]. These are also cited as the top three social priorities by older generations[43]. When surveyed in June 2019 for a monthly tracking survey of 1,000 adults, 18-24 year olds' priorities were also consistent with older generations. When asked what they think are the main issues facing Britain today, aside from Brexit, the key concerns were the NHS, the environment and poverty/inequality (see Figure 1)[44]. According to the available polling, Gen Z's main priorities in terms of issues affecting wider society are broadly in line with those of older generations, though few studies address this in detail to uncover any nuance in views.

Figure 1:

[42] Ipsos Mori. 'Opinions of Generation Z's Ambitions and Priorities Differ Greatly Between Generations'. Ipsos Mori/BBC. (2017)
[43] Ipsos Mori. 'Opinions of Generation Z's Ambitions and Priorities Differ Greatly Between Generations'. Ipsos Mori/BBC. (2017)
[44] Ipsos Issues. 'Ipsos Mori Issues Index: July 2019'. Ipsos Mori. (2019)

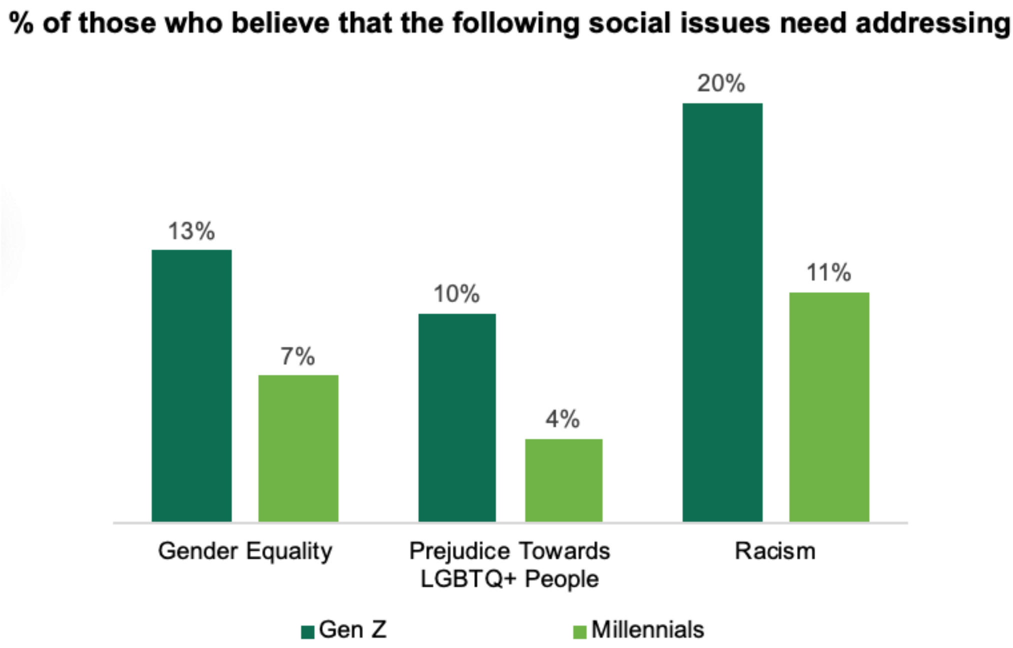


Source: Ipsos Mori[45] (Q1. What would you say is the most important issue facing Britain today? [Base: All survey respondents [n=1011])

However, there is evidence that Gen Z is more concerned about issues of social equality compared the previous generation. The 2017 poll cited above also shows that Gen Z are more likely think it is important to address gender equality, prejudice towards LGBTQ+ people, and racism (see figure 2)[46].

Figure 2:

[45] Ipsos Issues. 'Ipsos Mori Issues Index: July 2019'. Ipsos Mori. (2019)
[46] Ipsos Mori. 'Opinions of Generation Z's Ambitions and Priorities Differ Greatly Between Generations'. Ipsos Mori/BBC. (2017)



Source: Ipsos Mori[47] (Q1. Which three of the following issues do you think are most important issues to be addressed in Britain today? [Base: All survey respondents [n=3007])

Moreover, a survey of 15,500 16-20 year olds in 9 countries including the UK tested a range of ethical issues, revealing that this age group are most likely to say they are committed to animal welfare, equality, diversity and human rights – more so than the environment[48]. A pan-European peer-reviewed study (324 focus groups in 29 European countries excluding the UK) also found young people (aged 12-18 in 2010-12) to be particularly interested in human rights, anti-nationalism and migration. The young people who took part in the study there was a generational difference on this, based on their experience of interacting with older people, though the author cautions the perception is not necessarily evidenced.

It is unclear if their support for social issues is a specific trait of this generation

[47] Ipsos Mori. 'Opinions of Generation Z's Ambitions and Priorities Differ Greatly Between Generations'. Ipsos Mori/BBC. (2017)
[48] Nokes, C. and others. 'A generation without borders: embracing generation Z.' OC&C Strategy. (2019)

Is unclear how far Gen Z's support for this set of issues – gender and LGBTQ+ equality, diversity and migration, and human rights and anti-nationalism – is a life stage effect or a specific trait of this generation. One source (the European peer-reviewed study cited above) does argue that there is a distinct cohort effect around young people's attitudes toward immigration and diversity, arising from the circumstances in which they have grown up:

> "…cohort effects seem to be present in these young European's narratives of nationalism, diversity and racism and connectivity, and these arise from significant transitions in the population, in the rise of social media, and in different generational experiences of conflict and war."[49]

This study however did not include the UK, so it is unclear if this finding may apply in the UK context. In addition, no other sources reviewed shed light on whether support for equality is generational, or whether more likely to be a factor of youth.

Gen Z has a more international outlook than previous generations

Younger people are least concerned about immigration compared to other groups, though the difference between Gen Z and Millennials is slight. According to June 2019 data for a monthly tracking survey of 1,000 adults, 18-24 year olds are the least likely to list immigrants or immigration as a concern – just 5% are concerned, compared to 7% of Millennials (25-34 year olds) and 15% of 35-44 year olds.[50] Similarly, a 2017 poll of 3,000 16+ year olds including 1,000 Gen Z (16-22 year olds) reports that controlling immigration was a top three concern for 16% of Gen Z, compared with 19% of Millennials and 28% of Gen X[51]. Across different polls, concern with immigration clearly rises incrementally with age, and there is only a small difference between the attitudes of Gen Z and Millennials on this issue. However, it is unclear whether this is a trait of youth or generation. Moreover, it is

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[49] Ross, A. 'Young Europeans: A New Political Generation?', MDPI, (2018)
[50] Ipsos Issues. 'Ipsos Mori Issues Index: July 2019'. Ipsos Mori. (2019)
[51] Ipsos Mori. 'Opinions of Generation Z's Ambitions and Priorities Differ Greatly Between Generations'. Ipsos Mori/BBC. (2017)

established that it is difficult to make inferences about age, period, and cohort effects on political choices, because of other major factors affecting these[52].

Reflecting this, Gen Z are also the most open to free movement in Europe. In the 2017 survey cited above, 10% of Gen Z (16-22 year olds) said there should be no control on the free movement of people between different European countries, compared with 7% of Millennials and 5% of Gen X[53]. They are also the least likely to say that there should be greater control on the free movement of people within Europe – 28% believed this in 2017, compared to 30% of Millennials and 45% of Gen X. This may link to Gen Z's increased likelihood to be supportive of remaining in the European Union (EU).

In the UK, young people are more likely to be in favouring of remaining in the (EU) than leaving. Fifty nine per cent of 2,000 18-30 year olds polled in 2018 for an NGO said they would vote to remain in the European Union if another referendum was held tomorrow, over double the figure who said they would vote to leave (28%)[54]. The same survey showed that 41% of young adults think Brexit will result in the UK having less influence in the world and that 47% think the UK is on the wrong track[55]. Though the data do not show differences between Gen Z and Millennials, they support the belief held by this age group that they have an 'international outlook'.

A majority of young adults also consider they have an international outlook, and think it is important for their personal development. The same NGO study cited above found that 67% of 18-30s said in 2018 that they have an 'international outlook', with 68% saying that having this is important for them to achieve their personal goals in a modern society[56]. Meanwhile, a global poll in 2017 of 2,000 Gen Z and Millennials

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52 Tilley, J. 'Ageing and generational effects on vote choice'. Electoral Studies. Pages 19-27. (2014)
53 Ipsos Mori. 'Opinions of Generation Z's Ambitions and Priorities Differ Greatly Between Generations'. Ipsos Mori/BBC. (2017)
54 Wybron, I. and others. 'Next Generation UK'. British Council/Demos. (2017)
55 Wybron, I. and others. 'Next Generation UK'. British Council/Demos. (2017)
56 Wybron, I. and others. 'Next Generation UK'. British Council/Demos. (2017)

reported that 57% of 18-30 year olds said that travelling the world was one of their ambitions[57]. While it is unclear what this means in terms of behaviours, the data provide support for young people's subjective view of themselves as part of an interconnected world, something that might be usefully explored among the Gen Z age group in future research.

Gen Z is supportive of the environment, though it is unclear if they are more supportive than older generations

Concern for the environment is rising across all age groups, but the data does not consistently point to Gen Z being more concerned than older age groups. A June 2019 survey of 2,000 adults in the UK found that protecting the environment was the top policy priority for 18-24 year olds (30%) as well as for Millennials (see figure 3)[58].

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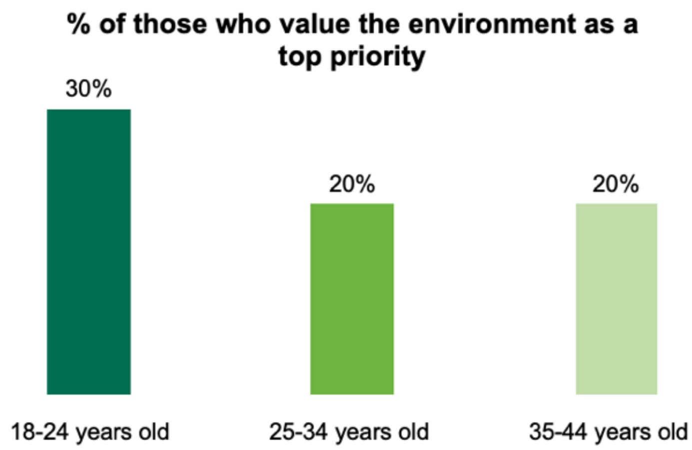
[57] Deloitte, 'The Deloitte Global Millennial Survey 2019', Deloitte, (2019)
[58] BritainThinks. 'Engage Britain: Challenges Facing Britain – June 2019'. BritainThinks. (2019)

Figure 3:



Source: BritainThinks[59] (Base: All survey respondents [n=5032])

A UK monthly tracking poll of 1,000 adults also shows that the environment is a significant concern for 18-24 year olds, though the difference in opinion between millennials fluctuates. In June 2019, 30% of 18-24 year olds said they were concerned about the environment, significantly more than the 19% of 25-34 year olds[60]. In July 2019, this difference had flattened, with a fifth of adults concerned about the environment (21% of 18-24s, compared with 19% of 25-34s)[61]. A US 2016 nationally representative quantitative study found that Gen Z (15-19 year olds) were in fact, trailing older generations in their concern for most environmental issues polled, including water conservation, renewable energy and deforestation[62]. This data shows that there is a clear concern among young people about the environment, though not certainly greater concern than older people. In addition, that these views can fluctuate over very short periods of time, perhaps revealing

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[59] Ipsos Mori. 'Opinions of Generation Z's Ambitions and Priorities Differ Greatly Between Generations'. Ipsos Mori/BBC. (2017)
[60] Ipsos Issues. 'Ipsos Mori Issues Index: June 2019'. Ipsos Mori. (2019)
[61] Ipsos Issues. 'Ipsos Mori Issues Index: July 2019'. Ipsos Mori. (2019)
[62] Fromm, J. 'Getting to know Gen Z: How the pivotal generation is different from Millennials'. The Future Cast. (2017)

sensitivity of environmental attitudes to the particular historical context, such as environmental or political events at the time of collection.

Despite often strong stated support for the environment, it is unclear how willing Gen Z are to take action on environmental concerns. One international study of 15,500 16-20 year olds in 2018 found that although Gen Z can be more vocal in their support for reducing the use of single-use plastics, just 13% say they are trying to do this, compared with 15% of Millennials and 30% of Baby Boomers[63]. Another study, which surveyed 1,000 self-selecting 'eco-conscious' consumers in the US in 2019 found that even among this group, perceived health may be a bigger driver than environmental concern when making food choices. A UK study also found that 'pro environmental' behaviours may be driven by other 'motives' such as saving money[64]. As such, it is important to consider this gap between environmental attitudes and behaviours when assessing Gen Z's relationship with the food system.

Gen Z's strong stated beliefs don't appear to translate into action

The gap between attitudes and behaviour is well-established and there is little existing evidence assessing the degree to which Gen Z's stated beliefs translate into action[65]. A US 2016 nationally representative quantitative study of 15-19 year olds, found that 60% say they will support brands that take a stand on issues regarding equal rights, sexual orientation and rights[66]. However, there is less evidence of how far Gen Z's consumption choices are driven by these concerns.

One multi-method US study (which included focus groups, social media analysis and mobile ethnography) questions whether Gen Z's strong beliefs translate into

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[63] Nokes, C. and others. 'A generation without borders: embracing generation Z.' OC&C Strategy. (2019)
[64] Lynn, P. 'Distinguishing Dimensions of Pro-environmental Behaviour'. Institute for Social and Economic Research. University of Essex. (2014)
[65] Shove, W. 'Beyond the ABC: climate change policy and theories of social change'. Environment and Planning. Pages 1273-1285. (2009)
[66] Fromm, J. 'Getting to know Gen Z: How the pivotal generation is different from Millennials'. The Future Cast. (2017)

meaningful action. It says that while Gen Z may frequently repost political statements, it is rare that they 'back this up' with voting or even paying attention to the news:

> "The media paints this generation as political activists, and for those who are involved, they truly are—voting, marching, and keeping watch on a portfolio of issues dear to them. Most, however, are still testing the waters, and many more are less willing to rock the boat."[67]

A UK study by a think tank about young people and social action also found a mismatch between young people's stated beliefs in social change and their behaviours. Based on an online survey of 600 14-18 year olds in the UK in 2018, the research found that though although young people have strong desire to effect social change, they have less confidence that they are able to take action do so[68]. Eighty four per cent said they want to help others, but only 52% believe they can make a positive difference in their communities. There are some demographic differences in likelihood to take part in social action, which the report defines as 'taking part in activities such as fundraising, giving time to charity, campaigning for an issue, or taking part in mentoring or tutoring without being paid'[69]. Young women and those who identify as religious were more likely to take part. At the same time, however, UK evidence suggests young people have become more likely to express their beliefs at the ballot box, with General Election turnout among the 18-24 age group jumping from 38% in 2005 to 68% in 2015[70]. Nevertheless, it remains to be seen whether this will translate into sustained political engagement.

[67] RPA. 'Identity Shifters' RPA. Pages 21-24 (2016)
[68] Partridge, L. and others. 'Teenagency: How Young People Can Create a Better World', RSA, (2018)
[69] Partridge, L. and others. 'Teenagency: How Young People Can Create a Better World', RSA, (2018)
[70] British Election Study, 'British Election Study - 2016', British Election Study cited by The Guardian. (2016)

Being ‘called out’ or criticised as ‘hypersensitive’ may be risks for Gen Z when expressing their opinions

In addition to a gap between attitudes and behaviour, it is known that there is a gap between what people think and what they say publicly. In a context in which there is heightened awareness of identity politics, Gen Z, apparently fear of being ‘called out’ (judged and evaluated negatively) for having the ‘wrong’ opinions. One UK market research study based on ‘ethnographic’ research with 12 Gen Z (born 1995-2002) argues that this leads to social fragmentation, in that across race, gender and socio-economic factors, ‘division exists at a high level for Gen Z and so their response is to look for unity in smaller, easier to reach places’, niche communities either on or offline where people share very similar views to them[71]. This might be to avoid being perceived as a ‘snowflake’, or for being censored for opinions that diverge from the socially accepted norm, according to a US study which observed this dynamic in focus groups with Gen Z. The same study found that Gen Z are hyper-sensitive to how their views will be received by their peers and will go out of their way to avoid criticism, especially when their beliefs are different from the norm[72]. However, it is not clear that these traits are particular to Gen Z; studies have long shown that ‘people’s personal networks are homogeneous with regard to many sociodemographic, behavioural, and intrapersonal characteristics’[73]. A peer-reviewed study argues that the tendency for people to associated with people similar to themselves limits people’s social worlds in a way that has powerful implications for the information they receive, the attitudes they form, and the interactions they experience[74]. As a result, it is unsurprising that many online communities are built around groups of people who are similar socially.

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[71] We Are Social. ‘We are Gen Z: Their power and paradox’. We Are Social. (2017)
[72] RPA. ‘Identity Shifters’ RPA. Pages 21-24 (2016)
[73] McPherson, M. and others. ‘Birds of a feather: Homophily in social networks’ Annual Review of Sociology. Pages 415–44. (2001)
[74] McPherson, M. and others. ‘Birds of a feather: Homophily in social networks’ Annual Review of Sociology. Pages 415–44. (2001)

Gen Z think they face economic and political uncertainty

Young people in the UK are worried about their economic futures. This finding is reported in a number of studies based on polls of young people. In 2017, 39% of 1,000 16-18 year olds polled for a policy report felt negative about the current economic climate in the UK compared to 18% who felt positive[75]. Linked to this, a 2016 survey of 4,000 18-24 year olds showed this age group felt it was more likely that humans will have landed on Mars by the time they reach 40 (46%) than that they will be debt free by the same age (30%).[76] The main challenges that 18-30 year olds say that young people face are all economic: lack of affordable housing (50%), lack of jobs (39%) and low pay (36%), according to a 2017 poll of 2,000 of that age group[77]. The context for this includes rising property and rent prices, the increase in university tuition fees, the rising cost of living, the growth in the casual labour market, as well as wage stagnation after the 2008 financial crash. Young people's reaction to these phenomena is striking evidence for the pessimism that they feel about the impact of the economy on their futures.

Young people are also concerned about the general state of politics. In the UK, young people appear more concerned about politics than the economy. In 2017, of 1,000 16-18 year olds felt especially negative about global politics (62%), with just 13% feeling positively[78]. At home, the same poll showed half (52%) felt negative about UK politics, while 18% felt positive[79]. Similarly, 47% of young adults think the UK is on the wrong track, according to a poll of 2,000 18-30 year olds in 2017[80]. The

[75] BPAS, 'Social Media, SRE, and Sensible Drinking: Understanding the Dramatic Decline in Teenage Pregnancy', British Pregnancy Advisory Service, (2018)
[76] Young Women's Trust, '*Worrying Time: Annual Survey',* Young Women's Trust, (2017)
[77] Wybron, I. and others. 'Next Generation UK'. British Council/Demos. (2017)
[78] BPAS. 'Social Media, SRE, and Sensible Drinking: Understanding the Dramatic Decline in Teenage Pregnancy'. British Pregnancy Advisory Service. (2018)
[79]BPAS. 'Social Media, SRE, and Sensible Drinking: Understanding the Dramatic Decline in Teenage Pregnancy'. British Pregnancy Advisory Service. (2018)
[80] Wybron, I. and others. 'Next Generation UK'. British Council/Demos. (2017)

report on the research with 16-18 year olds links this worry to uncertainty over the future of the UK, lack of leadership and concern over the impact of this on their own economic situation, fearing that they will be worse off than their parents. A US study also links young people's personal anxiety to fears of uncertainty in the world at large, and events overseas such as the Syrian migrant crisis, over which they have no control[81]. We found little evidence that explores in detail the links between their concern about politics and the particular issues they are worried about (social responsibility and the environment) – further research would be useful to explore the particular concerns that young people have about domestic and international political contexts.

Despite this, Gen Z are relatively optimistic about their futures. In 2017, a poll of 3,000 adults including 1,000 Gen Z (16-22 year olds) found that 25% of Gen Z said they believe they will have a better life than the generation before them[82]. In contrast, only 15% of Generation Y, 10% of Generation X and 7% of Baby Boomers think Gen Z will have a better life than the generation before them[83]. On balance, also, most 16-18 year olds in 2017 said they felt positive about their own likely living standard in the futures – 51% (including 50% of those from lower socio-economic backgrounds) felt positive, while only a fifth (22%) felt negative in 2018[84]. A poll of 2,000 adults in 2019 also found that 18-24 year olds are more optimistic than Millennials (25-34 year olds) – with a fifth (19%) saying they felt worried about the year ahead, compared with a quarter (26%) of Millennials, and a third (31%) saying they felt excited about the year ahead, compared with a fifth (18%) of Millennials[85]. The same study also found that the gap between a negative outlook on current events and a more positive outlook on personal lives held true across age groups.

[81] RPA. 'Identity Shifters' RPA. Pages 21-24 (2016)
[82] Ipsos Mori. 'Opinions of Generation Z's Ambitions and Priorities Differ Greatly Between Generations'. Ipsos Mori/BBC. (2017)
[83] Ipsos Mori. 'Opinions of Generation Z's Ambitions and Priorities Differ Greatly Between Generations'. Ipsos Mori/BBC. (2017)
[84] BPAS, 'Social Media, SRE, and Sensible Drinking: Understanding the Dramatic Decline in Teenage Pregnancy', British Pregnancy Advisory Service, (2018)
[85] BritainThinks. 'Mood of the nation: July 2019'. BritiainThinks. (2019)

While the sources reviewed do not point to this gap in personal and national optimism being unique to young people, they do suggest that Gen Z is not as troubled about their own lives than their world view might suggest.

Many of Gen Z report concerns over their mental health

Mental health concerns are prevalent among this age group and are increasing year on year, with the UK doing poorly compared to other countries. In 2016, one survey of 4,000 18-24 year olds found 34% of young people felt unhappy with their emotional health[86]. Another study based on analysing national statistical data showed one in five young people experience mental health issues, reporting high levels of anxiety[87]. Mental health is a rising concern for young people. A 2016 NSPCC report showed the biggest concern of young people calling its ChildLine in 2015/6 year was mental health issues, which accounted for 31% of telephone counselling sessions. By contrast in 1986 when the ChildLine service began, mental health was not among the top 10 reasons for calling[88]. While some of this rise may be accounted for by improved understanding and reporting, the rise is stark. Mental health also suffers more in the UK than elsewhere. A World Health Organisation (WHO) study into young people's health and well-being carried out in 42 countries in 2013/4 found that young people in the UK are among the least satisfied in their lives, particularly 15 year olds in England and Wales[89]. Within the scope of the REA search, sources were not identified that compare Gen Z's mental health concerns with older generations, but the evidence reviewed points to a clear trend of an increase in poor mental health, as well as awareness of it.

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[86] Young Women's Trust, '*Worrying Time: Annual Survey',* Young Women's Trust, (2017)
[87] Centre Forum, 'Children and young People's Mental Health: State of the Nation'. Centre Forum/BPA Report. (2016)
[88] Cherry, E. 'Who are Generation Z? The latest data on today's teens'. NSPCC/The Guardian. (2016)
[89] Inchley, J. and others. 'Growing up unequal: HSBC 2016 Study'. World Health Organisation. (2016)

Young women are more likely to say they are worried about their mental health. A 2016 report of a qualitative and quantitative longitudinal study among 13,000 young people – 13/14 at the time, but being tracked until they are 19/20 – it showed that 37% of girls reported feeling 'unhappy, worthless or unable to concentrate'[90]. This was an increase of 4% since 2005, according to comparison with a previous wave of longitudinal research, and more than double the proportion of boys reporting the same feeling in 2016 (15%)[91]. The WHO 2013/4 survey also found that the highest rate of anxiety and health worries occurred among teenage girls in England, Wales and Scotland[92]. Young women from lower socio-economic backgrounds report the highest levels of mental health concerns, according to a 2016 survey of 4,000 18-24 year olds. Forty two percent of women from lower socio-economic backgrounds felt unhappy with their emotional health compared to 34% of the overall sample surveyed[93]. This data clearly shows that young women are bearing the worst of a rise in mental health concerns.

2.5. Misconceptions about Gen Z

Stereotypes about Gen Z abound, though Gen Z often rejects these characterisations. For example, Gen Z are often characterised as addicted to social media, and being obsessed with their (online) image.

Gen Z are aware of these claims nonetheless and feel misrepresented by them. According to a survey of 2,000 British adults, 74% of 18-24 year olds say they feel young people are misunderstood, and that they are most commonly represented in

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[90] Department for Education. 'Longitudinal Study of Young People in England: Cohort 2, Wave 2'. Department for Education. (2018)
[91] Department for Education. 'Longitudinal Study of Young People in England: Cohort 2, Wave 2'. Department for Education. (2018)
[92] Inchley, J. and others. 'Growing up unequal: HSBC 2016 Study'. World Health Organisation. (2016)
[93] Young Women's Trust, '*Worrying Time: Annual Survey',* Young Women's Trust, (2017)

the media as ‘self-obsessed’, ‘lazy’ and ‘irresponsible’[94]. At the same time, they are often labelled ‘Generation Sensible’, in response to the trends discussed in this chapter, around drinking, smoking and teenage pregnancy. When a UK qualitative study asked focus groups of 16-18 year olds what they made of this ‘Generation Sensible’ label, the young people reacted with ‘pride, derision and disbelief’, emphasising the importance of not conflating Gen Z as homogenous group[95]. In addition, contrary to the image of them as glued to a screen, in a 2017 survey of 3,000 16+ year olds found that only 6% of Gen Z said their phone was most important to them, compared to 34% of older people who said it was[96].

2.6 Summary of main findings

- The evidence does show that Gen Z are engaging less in behaviours deemed to be ‘risky’ than previous generations of young people, with downward trends in smoking, drinking and teen pregnancy. However, these are not always explained by attitudinal shifts, or a desire to be ‘sensible’, and sometimes are better explained by other factors such as the increased price of alcohol and availability of contraceptives. This implies that while the ‘Generation Sensible’ label may be catchy, there is a lack of evidence to support it.
- There is also strong evidence that Gen Z are pessimistic about their economic futures, as well as the political situation. However levels of optimism about their personal lives are greater.
- There is evidence that Gen Z are more supportive than older generations of gender equality, diversity and LGBT equality. Some research suggests there is a cohort effect, though there is a lack of in-depth research to corroborate this.

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[94] Marketing Communication News. ‘Gen Z trusts brands but feels the psychological pressure of being stereotypes says new UM research’. Marketing Communication News. (2019)
[95] BPAS. ‘Social Media, SRE, and Sensible Drinking: Understanding the Dramatic Decline in Teenage Pregnancy’. British Pregnancy Advisory Service. (2018)
[96] Ipsos Mori. ‘Opinions of Generation Z’s Ambitions and Priorities Differ Greatly Between Generations’. Ipsos Mori/BBC. (2017)

- Gen Z express concern with the environment, though evidence suggests there is a difference between their views and behaviour, while distinctions drawn with older generations have been exaggerated, and the views of all age groups seem to fluctuate.
- While Gen Z has some strongly stated beliefs, it is less clear how far these beliefs translate into action, with few Gen Z engaging in ongoing action in politics or in their community. In terms of voting however, there is evidence of an increase among this age group over time.
- There is some convincing evidence that Gen Z is more ‘fluid’, especially when it comes to gender and sexual orientation, with Gen Z less likely to identify as heterosexual, or with gender binaries, than older generations. However, the extent to which fluidity extends to other areas is unclear.

3. Digital natives

In this section we discuss Gen Z's relationship to digital technology and the implications of this, as well as how their digital habits compare with older generations. We begin by addressing their online behaviour (3.1), and follow by exploring their use of social media in detail (3.2), before discussing Gen Z's reaction to growing up as digital natives (3.3).

3.1 Online Behaviour

Gen Z spend more time online

Having never known life without the internet, social networks and smartphones, Gen Z have been labelled as the first 'true digital natives'[97]. According to numerous studies, the amount of time Gen Z spends digitally connected surpasses all other generations and they also spend more time connected than Millennials did at the same age. According to a poll of 1,000 UK consumers, Gen Z spends an average of 10.6 hours a day on digital content, compared to 8.5 hours spent by Millennials[98]. Gen Z are often characterised as being 'obsessed' with technology with 73% being actively connected on their mobile phones within an hour of waking up[99]. This idea of 'hyper-connectedness' is the starting point for numerous studies about Gen Z and, given this shared experience of being digital natives is definitional, is often assumed to be the main way in which Gen Z's behaviour can be understood.

[97] Prenksy, M. 'Digital Natives, Digital Immigrants'. On the Horizon. MCB University Press. (2001)
[98] Adobe. 'Adobe Reveals Gen Z are UK's Biggest Content Consumers, Engaging with over 10 Hours of Online Content a Day – Executive Summary'. Adobe. (2018)
[99] Barclays. 'Gen Z: Step Aside Millennials'. Barclays. (2018)

The time Gen Z spend online is spent differently

Gen Z also spend their time online differently to older generations. A poll of 3,000 UK adults aged 16-65 shows the breakdown of Gen Z's digital use, revealing they spend 32% of their time online communicating, 29% watching, 15% listening, and 16% reading/browsing[100]. The key difference with older generations is that Gen Z are more likely to be communicating online, while older generations are more likely to be watching or listening. Gen Z are also more likely to be accessing the internet on smartphones, with a global online survey of 9,000 internet users aged 16-20 reporting that almost all (98%) own one[101]. Furthermore, a 2017 qualitative study of university students in the US found that 51% of their Internet time was spent on mobile phones, surpassing the time spent on desktop computers, laptops or tablets[102].

3.2 Social Media Use

Gen Z have different social media preferences to older generations, and have been described as the 'YouTube Generation'

Gen Z use a wider range of social media platforms than older generations do. There has been a small decline in the time Gen Z spend on Facebook in favour of alternatives including Snapchat and Instagram and they are less likely than older generations to use Twitter, according to a 2017 survey of 3,000 UK adults aged 16-65[103]. There are also differences by Gen Z age groups. A tracker of 477 15-24-year-

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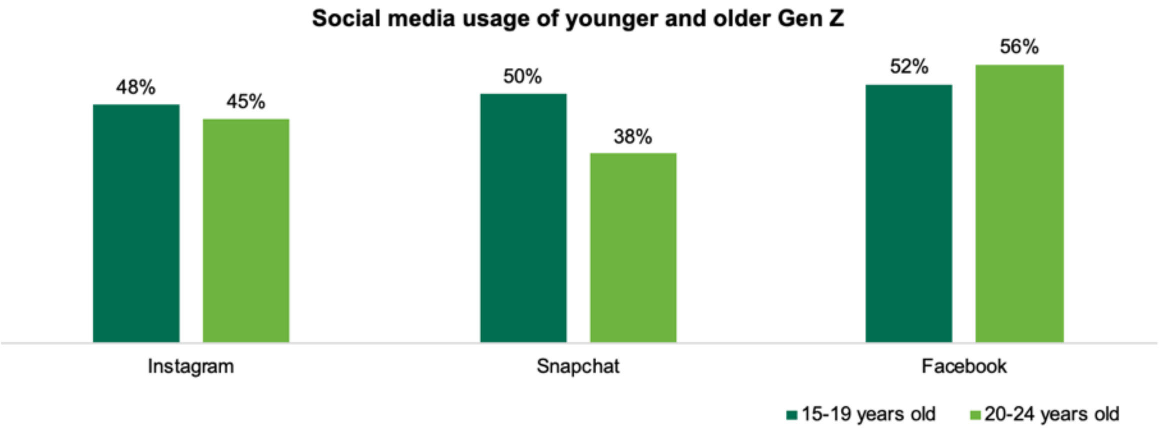
[100] Duffy, B. and others. 'Beyond Binary: The Lives and Choices of Gen Z'. Ipsos Mori. (2018)
[101] Young, K. 98% of Gen Z Own a Smartphone'. Global Web Index. (2017)
[102] Taken-Smith, K. 'Mobile Advertising to Digital Natives: preferences on content, style, personalisation and functionality'. Journal of Strategic Marketing. (2017)
[103] Duffy, B. and others. 'Beyond Binary: The Lives and Choices of Gen Z'. Ipsos Mori. (2018)

olds reported in 2018 that Instagram and Snapchat are more commonly used by younger Gen Zs, with 48% of 15-19-year-olds using Instagram (see figure 4)[104].

Figure 4:



Source: Ipsos Tech Tracker[105] (Base: All survey respondents [n=477])

Gen Z also state a preference for Instagram in the UK. A 2019 study of 1, 200 young people defined as Gen Z in the US, UK and India showed that although 87% of those UK Gen Z surveyed are using it (and of these 89% are checking it once per day) overall more people are using Facebook less than they did a year ago, which they say is driven by a preference for Instagram as well as a loss of trust in Facebook[106]. These studies show a shift in social media usage but lack a qualitative element which might help understand in what depth they actually interact with these platforms in their daily lives.

The way Gen Z are watching content is also different, with Gen Z more likely than older generations to watch on-demand content and YouTube instead of traditional

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104 Ipsos Tech Tracker. 'Ipsos Mori Tech Tracker – Q2 2018'. Ipsos Mori. (2018)
105 Ipsos Tech Tracker. 'Ipsos Mori Tech Tracker – Q2 2018'. Ipsos Mori. (2018)
106 Net Imperative. 'Instagram beats Facebooks as UK Gen Z's favourite social media platform'. Net Imperative. (2019)

live broadcasting. One study of 3,000 UK adults aged 16-65 says in 2018 Gen Z were watching TV 33% less than they did in 2010[107]. Notably YouTube ranks as Gen Z's favourite social media platform with 90% of US Gen Z watching YouTube daily and 70% watching over 2 hours per day[108]. A study by an NGO of the self-reported behaviour of 1,000 11-18-year-olds in the UK broke down the time spent on YouTube – it showed the most time is spent watching Youtubers/vloggers, followed by watching gaming videos, watching 'how-to' videos and watching reviews (see figure 5) [109]. The same study shows that the younger end of Gen Z in particular are not passive users of YouTube, with 70% liking or disliking videos, 60% sharing videos, and 39% creating and uploading their own content[110]. These studies highlight that Gen Z are consuming media and watching content not just for entertainment, as well as trends toward creating and not just consuming content.

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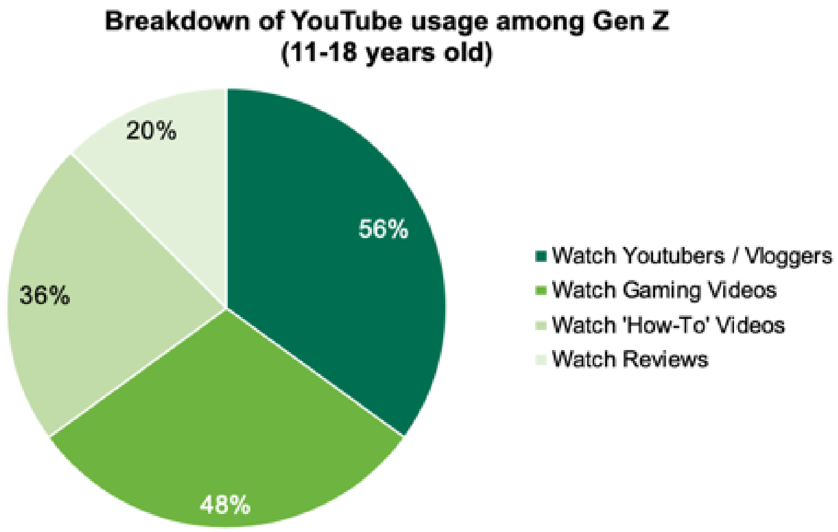
107 Duffy, B. and others. 'Beyond Binary: The Lives and Choices of Gen Z'. Ipsos Mori. (2018)
108 Vision Critical. 'Gen Z Characteristics: 5 Infographics on the Gen Z Lifestyle'. Vision Critical. (2019)
109 Hancock, L. 'Gen Z: The Digital Generation'. Youth for Christ. (2017)
110 Hancock, L. 'Gen Z: The Digital Generation'. Youth for Christ. (2017)

Figure 5:



Source: Youth for Christ[111] (Base: All survey respondents [n=1000])

It is hypothesised that increased time spent online has negative impacts on Gen Z

Gen Z spending more time online has generated various hypotheses about the impact that time spent online time has on them. One is the claim that it causes an increase in loneliness, another is that it decreases attention spans.

Despite social media providing more opportunities to connect with others than ever before, high levels of loneliness have been recorded among young people. A 55,000-person online survey conducted by a well-known research charity in the UK showed that levels of loneliness are highest in younger people aged 16-24, with 40%

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111 Hancock, L. 'Gen Z: The Digital Generation'. Youth for Christ. (2017)

feeling lonely, compared with only 33% of 25-34-year-olds[112]. One possible explanation for this is that there has been a greater shift from offline interaction towards online socialising among this age group – the same study observed that people who feel lonely have more 'online only' Facebook friends[113]. However, the evidence reviewed does not show a causal link between online time and loneliness, making it difficult to draw the conclusion that online behaviour is responsible for this trend.

It is also suggested that Gen Z's online behaviour affects their ability to concentrate. An often-cited claim is that Gen Z's attention span is 8 seconds, compared to the 12 second attention span of Millennials[114] . However, while the statistic has proved popular in marketing reports, numerous articles since have shown this statistic to not be clearly linked to credible research[115]. It is likely that this study gained popularity as it resonated with common perceptions of Gen Z, and felt highly relevant to content marketers, who are the targets of many reports about Gen Z. However, the study did not find any credible evidence to support this claim.

3.3 Gen Z and social media – a growing backlash?

Some reports suggest Gen Z appear to be actively trying to reduce their use of social media and time spent online. According to a poll of 2,000 internet users aged 16-64 (half from the US and the UK), Gen Z and Millennials are ahead of older generations in trying to decrease time spent on social media, with 58% of each cohort saying this, compared to 41% of UK adults overall[116]. 'Digital detoxes' are also common for

[112] Hammond, C. 'All in the mind – the loneliness experiment'. BBC/Wellcome Collection. (2018)
[113] Hammond, C. 'All in the mind – the loneliness experiment'. BBC/Wellcome Collection. (2018)
[114] Microsoft Canada Consumer Insights. 'Microsoft Attention Spans Research Report'. Microsoft. (2015)
[115] Maybin, S. 'Busting the attention span myth'. BBC News. Health. (2017)

[116] Global Web Index. 'Trends 19 – The trends to know for 2019'. Global Web Index. (2019)

Gen Z, with 89% of those surveyed in a US study claiming they take intentional breaks from social media[117]. In the UK, a 2018 poll of 1,000 students by a marketing agency also found that 77% of those surveyed would consider a social media detox[118]. One 2017 UK report based on polling data suggests this trend has emerged as Gen Z are more aware of the possible negative implications of broadcasting a point of view, or an image of yourself that might later be 'regretted but not erased'[119]. The report argues that this understanding explains the popularity of Snapchat and Instagram among Gen Z as they have features that control this exposure. While most studies are focused on what Gen Z are doing online, a greater understanding of Gen Z's reaction against social media and why they are at least temporarily reacting against it would provide insight into the relationship they actually have with online media.

3.4 Summary of main findings

- The most robust data in this chapter, which was mainly researched in the UK, demonstrate the key differences in the way that Gen Z are spending time online, with more time spent online than older people, and more than Millennials at the same age. Evidence also shows a move among Gen Z toward communicating rather than watching content, as well as the increasing importance of social media channels away from Facebook. Longitudinal studies that follow the same young people over time, and trackers that monitor changing online behaviour patterns across the population over time will be key to understanding the ongoing trends for this generation, and what can be defined as a cohort effect, or just life stage as the first 'digital natives'.
- The increased use of YouTube is a clear, evidenced trend, which demonstrates a changing relationship to the consumption of media. Gen Z are

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117 Vision Critical. 'Gen Z Characteristics: 5 Infographics on the Gen Z Lifestyle'. Vision Critical. (2019)
118 Seed Marketing. 'What Matters to Us'. Seed Marketing (2018)
119 Duffy, B. and others. 'Beyond Binary: The Lives and Choices of Gen Z'. Ipsos Mori. (2018)

often more active in this process, with a proportion using YouTube to create content and interact with others.

- Another trend which the evidence points to is that Gen Z are conscious of the impact technology has on their lives, with many trying to limit their use of online and social media. This points to more of two-way relationship between Gen Z and technology then many studies assume.

4. Consumption trends

This chapter focuses on the consumption trends pertinent to Gen Z and how they correlate with their values set out in chapter 3 of the report. Chapter 4.1 reviews evidence about the influences on the purchasing decisions of Gen Z. Following from this, the chapter then assesses the evidence concerning the role of digital and online influence on the purchasing and consumption behaviour of Gen Z (section 4.2).

4.1 Consumption priorities

Gen Z want to stand out as individuals

According to various market research reports, Gen Z are ‘hyper-individualised’ and are willing to pay more for products that will contribute to their ‘personal brand’[120] [121] [122]. A market research report, based on research spanning four generations, nine countries (including the UK) and 15,500 respondents, suggests that Gen Z have a desire to stand out and value the style and uniqueness of clothing over convenience and quality, also placing greater value on personalised, bespoke, or limited-edition items compared to other generations[123]. The same research suggests that this pursuit of ‘uniqueness’ extends beyond consumption choices into Gen Z valuing having a unique point of view, creating unique content, and having unusual hobbies or interests more than any other generation[124].

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120 Nokes, C. and others. ‘A generation without borders: embracing generation Z.’ OC&C Strategy. (2019)
121 Duffy, B. and others. ‘Beyond Binary: The Lives and Choices of Gen Z’. Ipsos Mori. (2018)
122 Tracy Francis and Fernanda Hoefel. ‘True Gen’: Gen Z and its implications for companies’. McKinsey & Company. (2018)
123 Nokes, C. and others. ‘A generation without borders: embracing generation Z.’ OC&C Strategy. (2019)
124 Nokes, C. and others. ‘A generation without borders: embracing generation Z.’ OC&C Strategy. (2019)

This desire to stand out is also evidenced by an online survey conducted in Brazil in 2017 with 2,321 men and women between 14-64 years old from various socioeconomic backgrounds, which found that 58% of A-class[125] and 43% of C-class Gen Z consumers say they are willing to pay more for personalised products[126]. Further qualitative research in Brazil, consisting of interviews with influential individuals from Gen Z and focus groups with 90 young people who classify as Gen Z, suggests that this increased appreciation for personalised and unique products may be linked to the central role of social media in Gen Z's lives, which the study suggests increases pressure to stand out and project an individual identity[127]. As a result, whilst consumption always has the potential as a means for self-expression, it appears that this may be heightened amongst Gen Z.

However, it is important to note that there is limited evidence to back up these claims, with there not being any UK-specific research that look into similar themes, and there not being any UK-based longitudinal research that compares how previous generations felt at a similar age. As a result, there is little robust evidence to suggest that Gen Z are 'hyper-individualised' in comparison to previous generations.

Gen Z value experiences over things

There is some evidence that Gen Z seem to prefer experiences over physical products. The previously cited research from 2019, spanning four generations, nine countries (including the UK) and 15,500 respondents, found that over a fifth of Gen Z surveyed strongly agree with the statement that they would rather spend money on

[125] A-class consumers have household incomes above $6,631; B-class consumers, incomes from $1,540 to $6,631; and C-class consumers, incomes from $516 to $1,540.
[126] Francis, T. and Hoefel, F. 'True Gen': Gen Z and its implications for companies'. McKinsey & Company. (2018)
[127] Francis, T. and Hoefel, F. 'True Gen': Gen Z and its implications for companies'. McKinsey & Company. (2018)

experiences than products[128]. This amounts to an increase of 1-2 percentage points in the US, and as much as 4-5 percentage point shift in Germany, compared to Millennials[129]. This research suggests that this preference could be related to being able to share experiences on social media, enabling Gen Z to build their "personal brand"[130]. Related to this, research from a UK based tour-operator suggests that when Gen Z travel, they look for connectivity, adventure and uninhabited destinations over all-inclusive poolside resorts[131]. A second suggested explanation for Gen Z preferring experiences over physical items is related to the idea there is a reduction in materialism and an increased concern for sustainability amongst Gen Z. A worldwide poll of 91,913 internet users aged 16-64 suggests that sustainability is an important issue for Gen Z, with 58% of Gen Z saying they would pay extra for a sustainable product[132].

However, the limited number of sources to support this interpretation brings the validity of this finding into question and suggests it may simply play on stereotypes of Gen Z being social media obsessed. A lack of data based on Gen Z in the UK also means the extent to which Gen Z in the UK share a preference for experiences is unclear.

4.2 The role of social media and online shopping in the shopping habits of Gen Z

Social media influences Gen Z purchase decision-making

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[128] Nokes, C. and others. 'A generation without borders: embracing generation Z.' OC&C Strategy. (2019)
[129] Nokes, C. and others. 'A generation without borders: embracing generation Z.' OC&C Strategy. (2019)
[130] Francis, T. and Hoefel, F. 'True Gen': Gen Z and its implications for companies'. McKinsey & Company. (2018)
[131] Janeen, C. 'Where does Gen Z want to travel?'. Missoulian. (2018)
[132] Global Web Index. 'Trends 19 – The trends to know for 2019'. Global Web Index. (2019)

Perhaps unsurprisingly, given Gen Z is defined by its status as digital natives, the evidence does suggest that social media and online marketing have an influence purchase decision-making by Gen Z. A market research report based on polling suggests that online adverts, social media and peer suggestions are the three biggest influences on purchasing decisions amongst Gen Z. Forty four percent of Gen Z say that social media is a source of product inspiration and 37% saying they have increased their use of social media in relation to purchase decision making in the last year[133]. A previously cited research study spanning four generations, nine countries (including the UK) and 15,500 respondents suggests that only 8% of Gen Z see new brands when out shopping as the inspiration for a purchase, compared to 17% of Gen X[134]. There is also some evidence that suggests that 'influencing' is a two-way process, with online platforms being shown to be an effective way for brands to engage with Gen Z and receive their feedback. The same study found that Gen Z enjoy online communities where they can voice their likes and dislikes regarding products and brands[135].

According to various sources, Gen Z are more likely than earlier generations to be influenced in purchasing decisions by 'influencers', defined as individuals who affect or change the way that other people behave, for example through their use of social media[136]. Gen Z actively follow influencers who they see as having a more hard-earned credibility, including people with genuine skill, an interesting perspective, or those who are taking direct action[137]. A market research study based on secondary research suggests that the growth in veganism and paleo diets is driven, in part, by bloggers and Instagram influencers who make these diets look like a desirable

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133 Accenture. 'Gen Z and Millennials leaving older shoppers and many retailers in their digital dust – Executive Summary'. Accenture. (2017)
134 Siegel, J. 'Wide-ranging Gen Z study reveals purchasing decisions strongly influenced by celebrities, desire for uniqueness'. PR Newswire. (2019)
135 Nokes, C. and others. 'A generation without borders: embracing generation Z.' OC&C Strategy. (2019)
136 Siegel, J. 'Wide-ranging Gen Z study reveals purchasing decisions strongly influenced by celebrities, desire for uniqueness'. PR Newswire. (2019))
137 We Are Social. 'We are Gen Z: Their power and paradox'. We Are Social. (2017)

lifestyle[138]. Despite this trend of Gen Z being strongly influenced by celebrities and influencers, a recent ethnographic study of 12 Gen Z young people in the UK found that the most popular influencers tend to be unappealing as they often lack credibility, which undermines the trust Gen Z has in their values[139].

However, there is limited robust evidence specific to Gen Z in the UK about the effect of influencers on the purchase decision-making of Gen Z, and little sense of how this compares to the influence of social media on the purchasing decisions made by other age-groups and generations. Combined, this makes it difficult to draw any definitive conclusions about the role of online influence on decision-making amongst Gen Z. Given the range of factors that are likely to lead to purchasing, and the subtle and sometimes subconscious processes involved, this is an area that needs to be explored further.

Online shopping is an accepted and mainstream tool of consumption

Evidence suggests that amongst Gen Z, the digital sphere not only has an impact on the decision-making aspect of purchasing, but also influences the actual purchasing process. According to a survey of nearly 10,000 respondents across 13 countries by an international management consultancy, over 40% of Gen Z are already purchasing more than 50% of their clothing and consumer electronic items online, whilst two-thirds of Gen Z are interested in purchasing via social media directly, for example through ‘shoppable posts’ which provide the shopper a direct link to the company’s website where they can finalise the purchase[140]. Research into online shopping amongst Gen Z in the UK is limited, but a poll of 3,000 consumers by a technology company found that free shipping is the primary reason given for buying from a brand’s website (see figure 6) [141]. The importance of delivery amongst Gen Z

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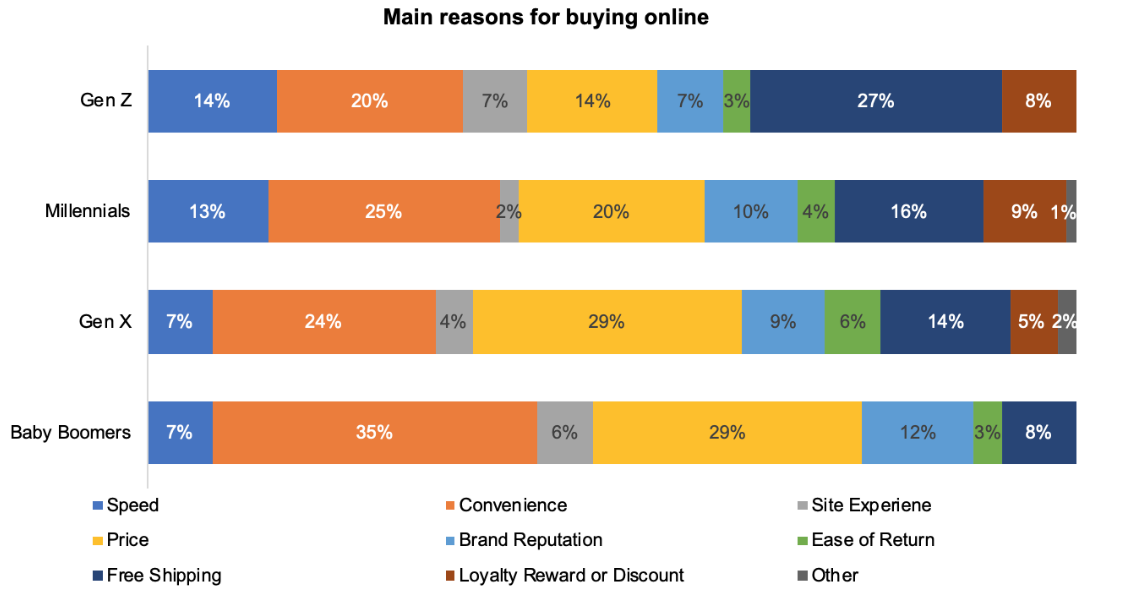
[138] Sautner, L. & Shin, J. ‘Gen Z: Building New Beauty’. WGSN. (2019)
[139] We Are Social. ‘We are Gen Z: Their power and paradox’. We Are Social. (2017)
[140] Accenture. ‘Gen Z and Millennials leaving older shoppers and many retailers in their digital dust – Executive Summary’. Accenture. (2017)
[141] Big Commerce - The Omni-Channel Retail Consumer Shopping Report (2018)

globally is in line with findings in reports by two different international management consultancies, although there is some suggestion that Gen Z are also willing to pay for fast and seamless delivery, with 58% of Gen Z saying they would pay more than $5 for one-hour deliveries[142] [143].

Figure 6:



Source: The 2018 Omni-Channel Retail Report[144] (Base: All survey respondents [n=3000])

Whilst research into the specifics of online shopping amongst Gen Z is limited, a recent poll of 3,000 consumers in the UK found that out of a range of places, Gen Z are most likely to have purchased from Snapchat or Instagram (see figure 7). The same research shows that this is also true of Millennials and in fact suggests that Millennials are the most likely generational group to have made purchases on

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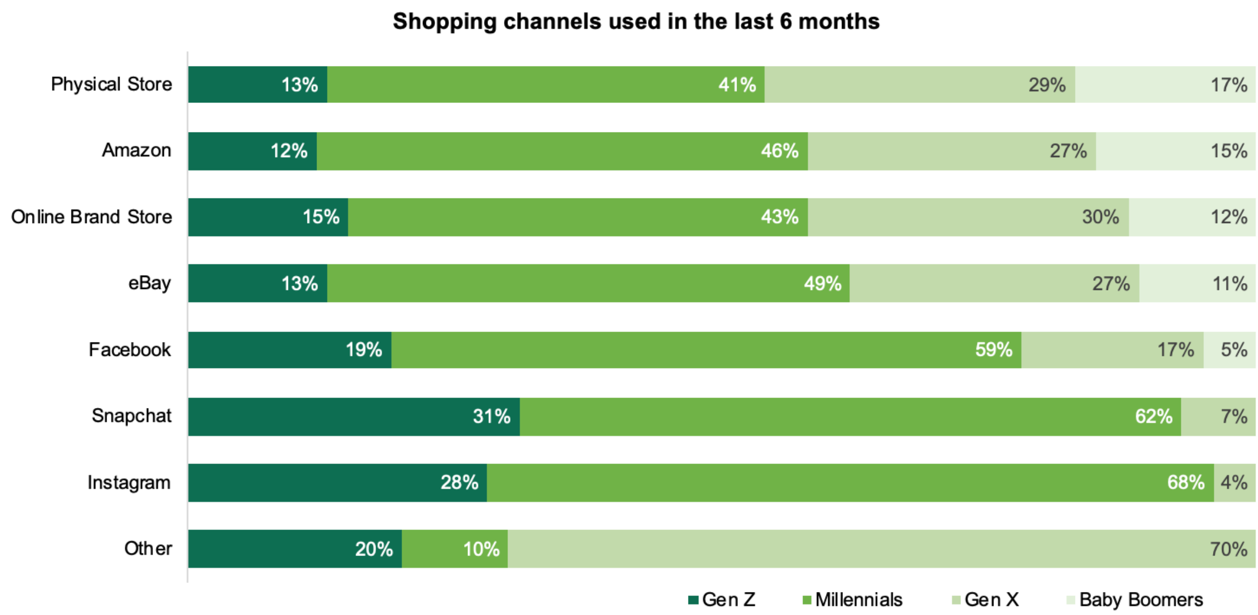
[142] Accenture. 'Gen Z and Millennials leaving older shoppers and many retailers in their digital dust – Executive Summary'. Accenture. (2017)
[143] Merriman, M. 'The Rise of Gen Z: A New Challenge for Retailers'. Ersnt & Young. (2015)
[144] Wallace, T. 'The 2018 Omni-Channel Retail Report: Generational consumer shopping behaviours comes into focus'. Big Commerce. (2018)

Snapchat or Instagram overall. There is no evidence exploring the drivers behind this, but it may be associated with life-stage and Millennials having more disposable income compared to Gen Z.

Figure 7:



Source: The 2018 Omni-Channel Retail Report[145] (Base: All survey respondents [n=3000])

The same global consumer shopping survey conducted in 13 countries that was cited previously, also suggests that Gen Z are interested in new shopping methods. According to the survey, 73% of Gen Z are interested in curated subscription-type offerings for fashion, 71% interested in automatic replenishment programs and 38% willing to try voice-activated ordering[146]. However, there is limited robust and detailed data about the current or future online shopping habits of Gen Z, particularly in the UK.

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145 Wallace, T. 'The 2018 Omni-Channel Retail Report: Generational consumer shopping behaviours comes into focus'. Big Commerce. (2018)
146 Accenture. 'Gen Z and Millennials leaving older shoppers and many retailers in their digital dust – Executive Summary'. Accenture. (2017)

Not strictly digital

While research indicates that online shopping and social media influence the consumption preferences of Gen Z, evidence also suggests that shopping is done across both online and offline platforms, indicating there hasn't been a total migration to online channels. A poll of nearly 10,000 respondents in 13 countries (including the UK) suggests that despite being labelled 'digital natives', only 24% of Gen Z shoppers prefer online shopping and 13% prefer shopping via their phone[147]. The same research indicates that physical shops are still important to Gen Z, with 60% of Gen Z shoppers preferring to purchase items in a shop, 46% saying they will check in a shop to get more information before making an online purchase and 77% of Gen Z respondents in the US saying that shopping at 'brick-and-mortar' shops is their preferred choice[148]. This is supported by findings from a pan-European research project among more than 50,000 adults across 11 countries (including the UK) focusing on grocery sales, which found that at 76%, Gen Z are the age group most likely to say they find going to the shops is enjoyable[149]. Additionally, the research suggested that at 22%, Gen Z are more likely to do their research and purchasing in-store, compared to 14% of Millennials[150]. These findings suggests that whilst Gen Z may purchase online they still enjoy and may even prefer face-to-face retail experiences.

4.3. Summary of main findings

- The majority of evidence related to this topic is based on grey literature and there is very little UK-specific or relevant peer reviewed research available, which means that the overall evidence is weaker on this topic.

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147 Accenture. 'Gen Z and Millennials leaving older shoppers and many retailers in their digital dust – Executive Summary'. Accenture. (2017)
148 Accenture. 'Gen Z and Millennials leaving older shoppers and many retailers in their digital dust – Executive Summary'. Accenture. (2017)
149 Glen Parker. 'Why Gen Z shoppers could turn out to be the unexpected saviours of the high street'. The Grocer. (2018)
150 Glen Parker. 'Why Gen Z shoppers could turn out to be the unexpected saviours of the high street'. The Grocer. (2018)

There is also little longitudinal data, making it difficult to assess the extent to which the limited findings are related to a life-stage or cohort effect. Finally, the data that does is exist is often based on stated preference and does not provide detailed information into behaviours and the attitudes driving these behaviours.

- The strongest evidence about Gen Z consumption relates to their shopping practices. Amongst Gen Z, online shopping appears to be common practice, with some evidence suggesting that delivery is key part of the online shopping experience. Evidence also suggests that Gen Z are open-minded towards newer, more innovative types of consumption, including subscription-type offerings, automatic replenishment programs and voice-activated ordering.
- However, whilst Gen Z are often perceived as the first ‘digital’ generation, evidence suggests that only a small minority of Gen Z actually prefer online shopping, and that the majority prefer face-to-face shopping experiences. This implies that Gen Z may be less dependent on technology than often suggested.
- Some non-UK specific evidence suggests that when it comes to their consumption habits, Gen Z value individualised and unique products, and have a strong desire to stand out. There is also some evidence to suggest that amongst Gen Z there is a preference for experiences rather than material goods. These preferences are often attributed to the centrality of social media to their lives, and an increased concern for sustainability.
- There is also some evidence to show that social media, online ‘influencers’ and online marketing have some impact on decision-making amongst Gen Z, with evidence suggesting that online platforms are also allowing Gen Z to influence the decision-making of brands and companies. However, the data on this is limited.

5. Food attitudes and behaviours

This section reviews and assesses evidence about the food attitudes and behaviours of Gen Z. We begin by addressing what Gen Z are currently eating (section 5.1), before looking at where they eat, focusing specifically on informal eating out (section 5.2). The next section (5.3) then looks at what influences the food attitudes and behaviours of Gen Z. Finally, we explore the impact of the food attitudes and behaviours of Gen Z on their health (section 5.4).

5.1 What they're eating

Gen Z have a typically teenage diet

Evidence suggests that Gen Z are not eating five portions of fruit and vegetables a day and are eating less fruit and vegetables compared to other age-groups. According to the FSA's Food and You survey, conducted with a nationally representative sample of adults over 16 in England, Wales and Northern Ireland, those aged 16-24 years old are the least likely to say they eat raw fruit, raw vegetables and cooked vegetables at least once a day (see figure 8)[151]. According to data from the National Diet and Nutrition Survey (NDNS), a continuous cross-sectional survey designed to assess the diet, nutrient intake and nutritional status of a representative sample of around 1,000 people per year (500 adults and 500 children), Gen Z are more likely to say they never eat fish or seafood compared to Millennials[152].

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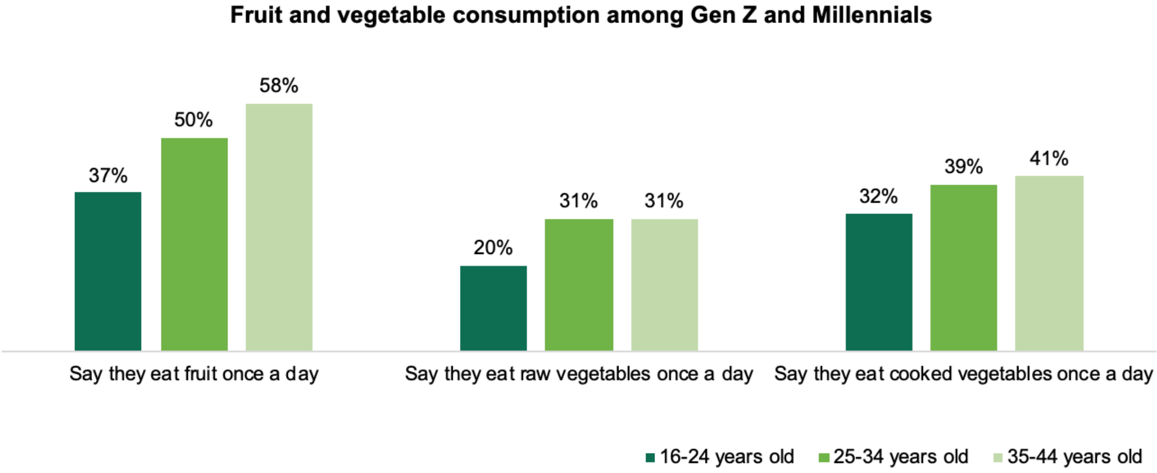
[151] FSA. '*Food and You. Wave 5, 2019'.* Food Standards Agency. (2019)
[152] NatCen Social Research, MRC Elsie Widdowson Laboratory. National Diet and Nutrition Survey Years 1-9, 2008/09-2016/17. (2019).

Figure 8:

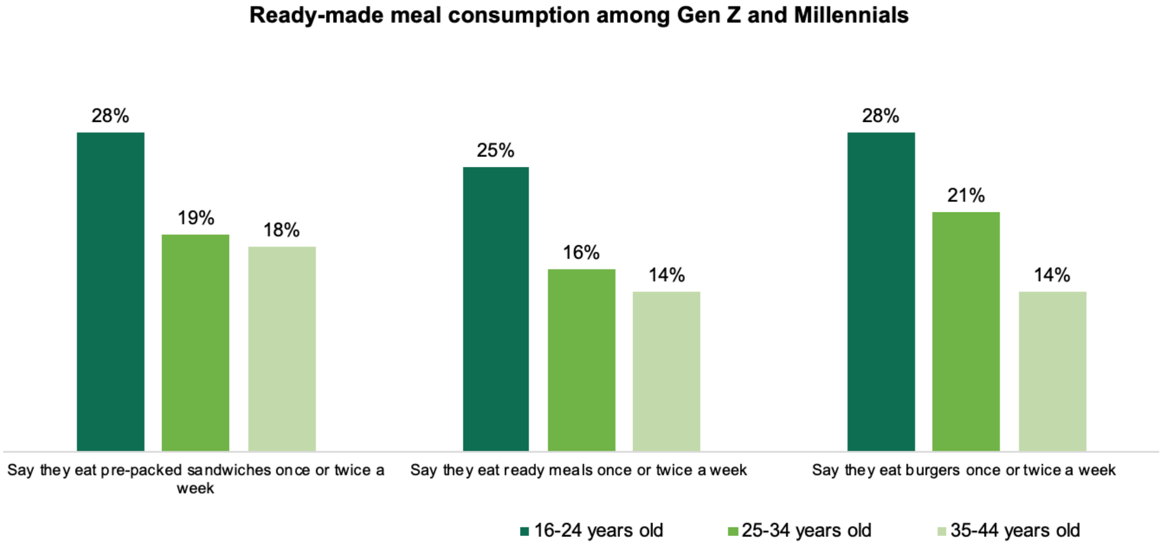


Source: FSA[153] (Base: All survey respondents [n=2241])

As well as eating less fruit, vegetables and fish, it appears that Gen Z are also eating more pre-packed sandwiches, ready meals and burgers than those aged 25-34 and 35-44 years old (see figure 9).

153 FSA. ‘Food and You. Wave 5, 2019’. Food Standards Agency. (2019)

Figure 9:

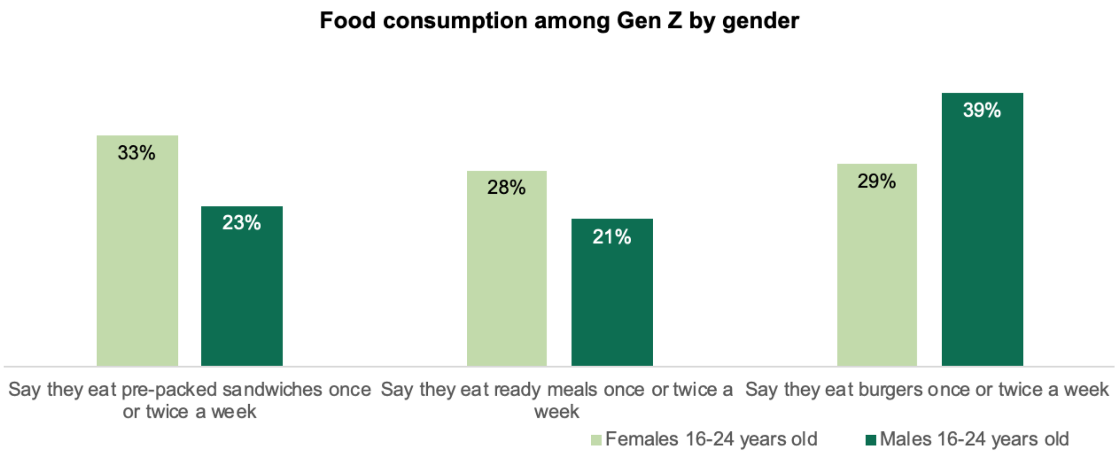


Source: FSA[154] (Base: All survey respondents [n=2241])

There also appear to be differences within Gen Z, with males being more likely to say they eat burgers once or twice a week, and females aged 16-24 years old more likely to say they eat pre-packed sandwiches and ready-meals once or twice a week compared to males (see figure 10).

[154] FSA. 'Food and You. Wave 5, 2019'. Food Standards Agency. (2019)

Figure 10:



Source: FSA[155] (Base: All survey respondents [n=2241])

However, evidence suggests that this is down to life stage rather than a cohort effect

It is known that there are changes in dietary intake over the lifecourse and that stage of life, as well as social context, is likely to be important in understanding patterns[156]. Whilst Gen Z may have less healthy diets than other age-groups, it appears that the likelihood of making 'healthier' choices may increase with age, as they become more health conscious and have higher incomes. This is substantiated by data from the NDNS survey comparing consumption levels of salad vegetables and fish/ seafood between current Gen Z and Millennials aged 16-24 from the first three survey years (2008/09 to 2010/11), allowing for comparisons to be made between Gen Z, and an earlier generation at the same age. These data suggests that when aged 16-24 years old, Millennials were also more likely to say they never eat salad vegetables or

155 FSA. 'Food and You. Wave 5, 2019'. Food Standards Agency. (2019)
156 Devine, C. 'A life course perspective: Understanding food choices in time, social location, and history' Journal of Nutrition Education and Behaviour. Pages 121-128. (2005)

fish/ seafood compared to older generations, providing an indication that there is a life-stage effect at play for these foods [157].

According to an online survey of 1,448 British or European students up to the age of 30 which examined dietary patterns, older students are more health-conscious than their younger counterparts. The study hypothesises that as students mature, they are more aware of the influence of their diets on their health and wellbeing, with health therefore becoming an increasingly important factor when deciding what to eat[158]. As well as potentially being less health-conscious than older age-groups, some evidence suggests that cost is also a barrier to Gen Z eating a balanced and varied diet, with 13% of 16-24 year olds saying they often or sometimes can't afford to eat balanced meals[159].

Gen Z and Millennials are the most likely age groups to be vegan and vegetarian

Various reports suggest that the numbers of vegetarians, vegans and 'flexitarians'[160] are on the rise in the UK[161]. Research combining a poll of 2,000 people of all ages and focus groups with shoppers across all British supermarket chains, found that 33.5% of the population say they are cutting down on or are cutting out meat, with 21% saying they are flexitarian, 9.5% saying they are vegetarian and 3% say they are vegan[162]. According to the same study, 60% of vegans and 40% of vegetarians say they turned vegetarian or vegan within the last five years. Working with a market

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[157] NatCen Social Research, MRC Elsie Widdowson Laboratory. National Diet and Nutrition Survey Years 1-9, 2008/09-2016/17. (2019).
[158] Sprake, E., and others. 'Dietary patterns of university students in the UK: a cross-sectional study'. Nutritional Journal. (2018)
[159] FSA. 'Food and You. Wave 5, 2019'. Food Standards Agency. (2019)
[160] Defined as having a largely vegetable-based diet which is occasionally supplemented by meat or reducing the amount of meat they eat
[161] Hancox, D. 'The unstoppable rise of veganism: how a fringe movement went mainstream'. The Guardian. (2018)
[162] Waitrose. 'Food and Drink Report 2018-19: The Era of the Mindful Consumer'. Waitrose. (2019)

research organisation, a vegan advocacy organisation conducted face-to-face interviews in 2016 with nearly 10,000 adults aged 16 and above across England, Scotland and Wales, with findings suggesting that the number of vegans has grown fourfold in the past four years from 150,000 to 600,000[163]. These studies suggest that a large number of people have made substantial changes to their diets in recent years, and that the number cutting back or saying they are cutting back on eating meat may be rising sharply, suggesting that this change in diets may be part of a larger population trend[164].

According to the same poll of 2,000 shoppers across all British supermarket chains cited earlier, Gen Z (16-24s) are slightly less likely to be vegetarian or flexitarian compared to those aged 25-34 and 35-44, but are as likely as 25-34 year olds to be vegan, and are more likely to say they are vegetarian than those aged 55+ (see figure 11 below)[165]. The study of veganism cited above, of face-to-face interviews with almost 10,000 adults across England, Scotland and Wales, also found that one in six vegans are teenagers and 42% of vegans are 15-34 years old, suggesting veganism is particularly popular amongst both Gen Z and Millennials[166].

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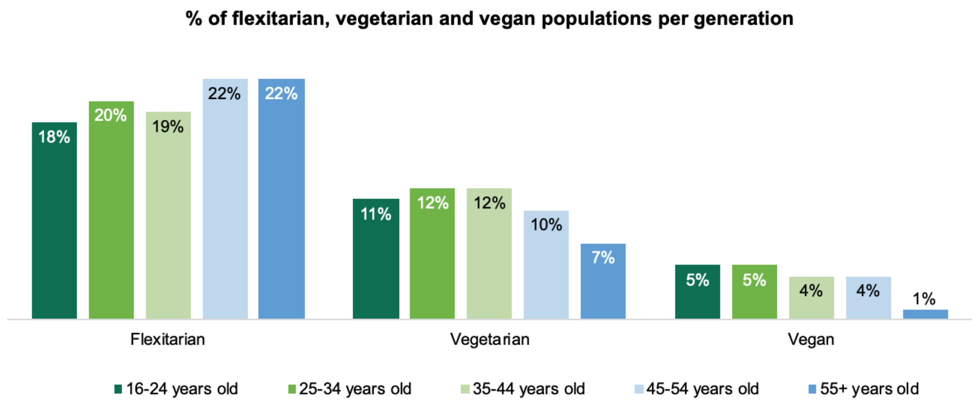
[163] Smithers, R. 'Third of Britons Have Stopped or Reduced Eating Meat – Report'. The Guardian. (2018)
[164] Waitrose. 'Food and Drink Report 2018-19: The Era of the Mindful Consumer'. Waitrose. (2019)
[165] Waitrose. 'Food and Drink Report 2018-19: The Era of the Mindful Consumer'. Waitrose. (2019)
[166] Ipsos Mori. 'Poll Conducted for the Vegan Society'. Ipsos Mori/The Vegan Society. (2016)

Figure 11:



Source: Waitrose[167] (Base: All survey respondents [n=2000])

This is broadly in line with data from the NDNS survey which found that the percentage of self described vegetarians is slightly higher for Millennials (4%) than Gen Z (3%). Millennials (15%) are also most likely to drink alternatives to cows milk (e.g. goats milk or soya/nut alternatives) weekly, compared to only 6% of Gen Z and 9% in earlier generations[168]. However, according to the NDNS survey data, the percentage of Gen Z reporting that they never eat meat (9%) is higher than for other generations. Furthermore, chicken and poultry was avoided by 5% of Gen Z, 2% of young Millennials and 4% of other generations[169].

Whilst there is relatively little information on the demographics of vegetarians and vegans amongst Gen Z, there is some indication that females are more likely to be vegetarian compared to males. According to the 2018 study into the dietary patterns

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167 Waitrose. 'Food and Drink Report 2018-19: The Era of the Mindful Consumer'. Waitrose. (2019)
168 NatCen Social Research, MRC Elsie Widdowson Laboratory. National Diet and Nutrition Survey Years 1-9, 2008/09-2016/17. (2019).
169 NatCen Social Research, MRC Elsie Widdowson Laboratory. National Diet and Nutrition Survey Years 1-9, 2008/09-2016/17. (2019).

of university students in the UK, vegetarianism is more prevalent amongst female students, with male students being more likely to consume meat and fast food[170].

Evidence about the motivations behind adopting vegan and vegetarian diets amongst Gen Z, especially amongst Gen Z in the UK, is somewhat limited. However, the same poll by the major supermarket chain cited above suggests that concern about animal-welfare is the leading reason to become vegetarian or vegan (55%), followed by health-related reasons (45%) and environmental concerns (38%)[171]. A recent poll in the US focusing on Gen Z, found that 35% of Gen Z vegetarians are vegetarian in support of animal rights and environmental impact[172]. This suggests that choices around vegetarianism and veganism may be driven just as much by concerns around environment and animal-welfare, as well as concerns about personal health. However, it is important to note that there may be a certain degree of post-hoc rationalisation at play here, with participants potentially under or overestimating the influence of certain factors when asked to explain certain behaviours after they have taken place.

There is mixed evidence about how open-minded Gen Z are about food

Evidence about how open-minded Gen Z are to food, and how this open-mindedness compares to other generations, is mixed and inconclusive. Research from Wave 5 of the FSA's Food and You consumer survey, which consisted of 2,241 interviews across England, Wales and Ireland in 2018 with a representative sample of adults aged 16 and over, found that that 71% of 16-24 year olds in the UK agree they like to try new things to eat[173]. However, with 79% of 25-34 year olds and 83% of 35-44 year olds also saying they like to try new things to eat, having an open

[170] Sprake, E., and others. 'Dietary patterns of university students in the UK: a cross-sectional study'. Nutritional Journal. (2018)
[171] Waitrose. 'Food and Drink Report 2018-19: The Era of the Mindful Consumer'. Waitrose. (2019)
[172] Hennessy, H., 'Six Industries Gen Z is Changing Forever', PR Newswire, (2019)
[173] FSA. 'Food and You. Wave 5, 2019'. Food Standards Agency. (2019)

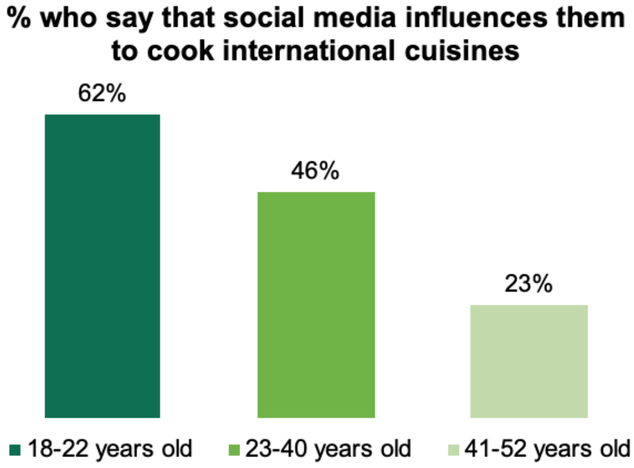
attitude to food may not be specific to Gen Z, and actually appears to be lower compared to older age-groups[174].

However, the same survey by the FSA also found that 86% of 16-24 year olds disagree with the statement ‘I’m not generally interested in food’ compared to 83% of 25-34 year olds, and 29% of 16-24 year olds say they consider foods for different diets (for example, vegetarian, halal or kosher foods), the highest percentage of any age bracket[175]. This in turn suggests that overall interest in food and willingness to consider foods for different diets is highest among Gen Z.

In line with the hypothesis that Gen Z have an international outlook, evidence also suggests that despite potentially being less open to trying new foods, Gen Z do like to eat foods from different cuisines. A market research report based on a poll of adults in the U.S. found that interest in unusual or exotic products ranked highest with Gen Z and 2018 research in the US by a market research organisation also suggests that Gen Z are much more likely than older generations to be inspired by social media to cook international cuisines[176] (see figure 12 below).

[174] FSA. ‘Food and You. Wave 5, 2019’. Food Standards Agency. (2019)
[175] FSA. ‘Food and You. Wave 5, 2019’. Food Standards Agency. (2019)
[176] Mintel. ‘Generation Z set to impact the future of food and drink innovation’. Mintel. (2018)

Figure 12:



Source: Mintel[177]

5.2 Where they are eating

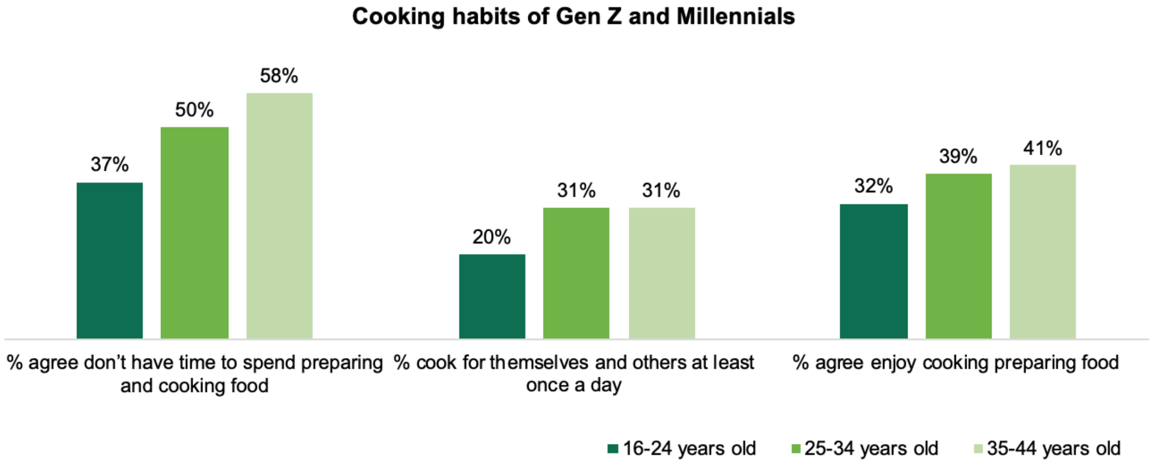
There is little ability or willingness among Gen Z to cook

A number of UK studies note that the willingness and ability to prepare and cook food amongst Gen Z is lower than for other age-groups. According to data from Wave 5 of FSA's Food and You survey, Gen Z are the most likely age-group to say they don't have the time to prepare and cook food and are the least likely to say they cook for themselves and others once a day, and are the least likely to say they enjoy cooking or preparing food (see figure 13 below)[178]. This is reflected in findings from an online survey of 1,448 British or European students up to the age of 30 which examined dietary patterns, where 45% of the sample reported limited (or non-

[177] Mintel. 'Generation Z set to impact the future of food and drink innovation'. Mintel. (2018)
[178] FSA. 'Food and You. Wave 5, 2019'. Food Standards Agency. (2019)

existent) cooking ability, being at best only able to cook a limited range of meals from raw ingredients[179]. However, it remains unclear from the evidence whether the lack of ability or willingness to cook is a result of life stage or whether this reflects generational shift.

Figure 13:



Source: FSA[180] (Base: All survey respondents [n=2241])

Gen Z are the most likely to consume food outside of the home

Eating out, takeaways and fast food are established parts of Gen Z's diets. According to FSA's Food and You survey, Gen Z are the most likely age group to eat out, away from the home compared to all other age groups, including Millennials (see figure 14 below). The same survey found that only 1% of those aged 16-24 had not eaten or bought food away from home. Whilst once or twice a month is the most common frequency for eating out across generations, Gen Z are mostly likely to say they do

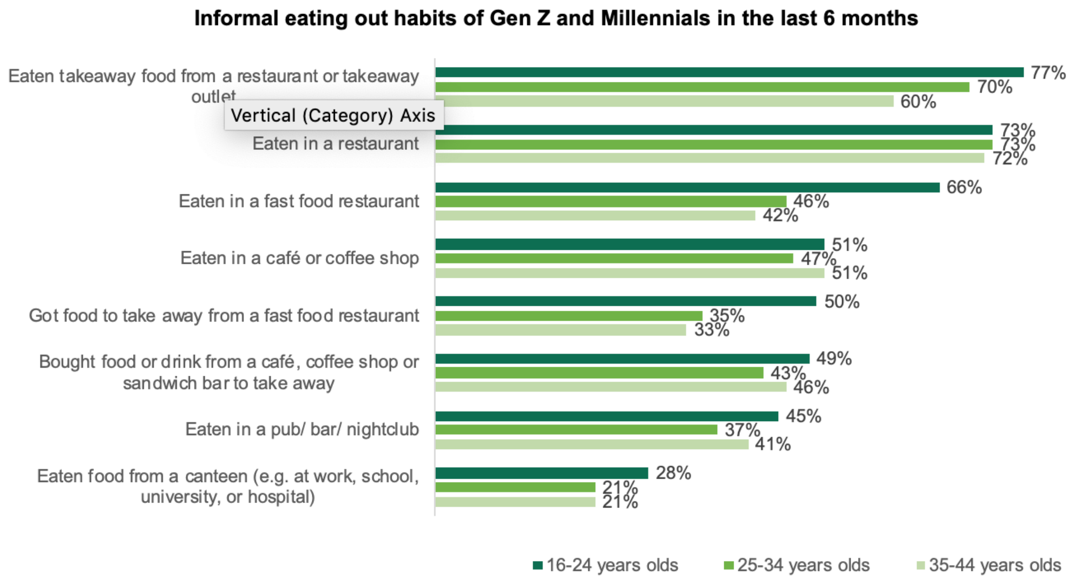
[179] Sprake, E., and others. 'Dietary patterns of university students in the UK: a cross-sectional study'. Nutritional Journal. (2018)
[180] FSA. 'Food and You. Wave 5, 2019'. Food Standards Agency. (2019)

this. According to data from the NDNS survey, Gen Z are also most likely to say they eat takeaway food once or twice per week, which is more frequent than for other generations[181]. The average frequency across age groups is once or twice a month.

These findings are supported by a qualitative study of 86 young people in the UK in 2016 which found that after home, the most frequently visited food environment was ‘closed/private’ food outlets (including schools and workplaces), followed by 'takeaway and fast food', convenience stores and restaurants and that adults aged 20-24 years old were the most likely to have visited fast-food outlets in the last 6 months[182]. In line with this, data from Wave 5 of the FSA’s Food and You survey also suggests that health is less of a priority when deciding to eat out, with 23% of 16-24 year olds selecting healthier food or choices as an important factors when deciding to eat out, compared to 33% of 25-34 year olds and 36% of 35-44 year olds[183].

[181] NatCen Social Research, MRC Elsie Widdowson Laboratory. National Diet and Nutrition Survey Years 1-9, 2008/09-2016/17. (2019).
[182] Tyrell, R. and others. ‘Food Environments of Young People: Linking Individual Behaviour to Environmental Context’. Journal of Public Health. (2016)
[183] FSA. ‘Food and You. Wave 5, 2019’. Food Standards Agency. (2019)

Figure 14:



Source: FSA[184] (Base: All survey respondents [n=2241])

In terms of socio-economic differences within this age group, there is some evidence to suggest that eating out informally is more frequent amongst Gen Z from a lower socioeconomic grade. Data from the NDNS survey suggests that the household income for Gen Z that eat out regularly is significantly higher than for Gen Z who rarely or never eat out, although no significant difference in income was found in relation to the consumption of takeaway meals[185]. However, a qualitative research study of 2,000 British adolescents aged 11-18 in 2017 found that young people from households with lower incomes were more likely to consume takeaway meals once or twice per week or more compared to those with the highest income[186]. Furthermore, a recent study of secondary school students in Scotland found three-

[184] FSA. ‘Food and You. Wave 5, 2019’. Food Standards Agency. (2019)
[185] NatCen Social Research, MRC Elsie Widdowson Laboratory. National Diet and Nutrition Survey Years 1-9, 2008/09-2016/17. (2019).
[186] Taher, A., and others. ‘The Cross-Sectional Relationships Between Consumption of Takeaway Food, Eating Meals Outside the Home and Diet Quality in British Adolescents’. Journal of Public Health Nutrition. (2018)

quarters of participants regularly purchased food outside of school and that those at schools in areas of lower socio-economic status were more likely to report regularly leaving school to buy food[187]. According to this study, students at schools in areas of low socio-economic status often thought negatively of food sold in schools and left school to find “better” food and value for money[188].

5.3 Influences on decision making

Price is a key motivator of food choices made by Gen Z

Price appears to be a strong driver of food choices for Gen Z.[189]. According to FSA’s Food and You survey, it appears that price is a more important factor to Gen Z compared to older age-groups, with 67% of 16-24 year olds saying they consider price of food important when purchasing compared to 41% of 75 year olds or older[190]. According to the same survey, 62% of people aged 16-24 made at least one change in their eating or shopping habits due to financial reasons, and those aged 16-24 years old are more likely to say they have bought items that were on special offer more as a result of financial reasons compared to older age-groups (figure 15).

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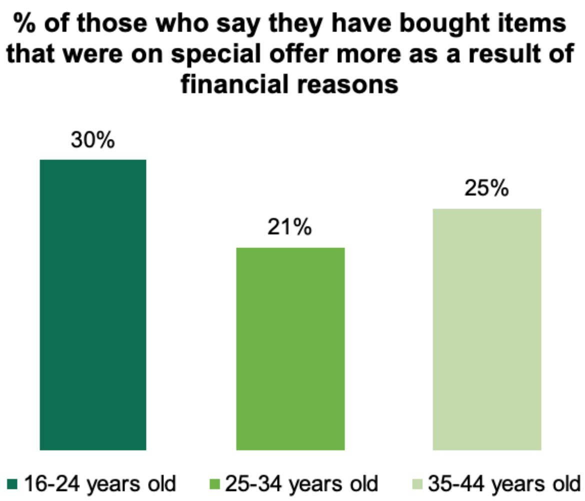
187 Wills, W., and others. ‘Socio-Economic Factors, the Food Environment and Lunchtime Food Purchasing by Young People at Secondary School’. International Journal of Environmental Research and Public Health. (2019)
188 Wills, W., and others. ‘Socio-Economic Factors, the Food Environment and Lunchtime Food Purchasing by Young People at Secondary School’. International Journal of Environmental Research and Public Health. (2019)
189 FSA. ‘Food and You. Wave 5, 2019’. Food Standards Agency. (2019)
190 FSA. ‘Food and You. Wave 5, 2019’. Food Standards Agency. (2019)

Figure 15:



Source: FSA[191] (Base: All survey respondents [n=2241])

Gen Z are also considering price when deciding where to eat, with 70% of 16-24 year olds saying they consider price an important factor when deciding where to eat, compared to 62% of those aged 35-44 years old. According to the same data, 69% of 25-34 year olds also consider price an important factor when deciding where to eat, which would suggest that the consideration of price is a factor shared across both Gen Z and Millennials[192].

Social media may have more of an influence on food related decision-making amongst Gen Z

Evidence also suggests that social media has an influence on Gen Z reported food and eating behaviours. A market research report from 2018 based on polling with adults in the US notes that young adults are more likely to say they are inspired to

191 FSA. 'Food and You. Wave 5, 2019'. Food Standards Agency. (2019)
192 FSA. 'Food and You. Wave 5, 2019'. Food Standards Agency. (2019)

cook by what they see on social media, with 62% of young adults aged 18-22 saying they cook international cuisines at home from social media, compared to 46% of Millennials (aged 23-40) and 23% of Generation X consumers (aged 41-52) who cook at home[193]. Data from the Food and You survey also suggests that social media has more of an influence on Gen Z compared to older generations, with 39% of 16-24 year olds saying they use social media to help them decide where to eat out, compared to 30% of those aged 25-34 years old and 29% of those 35-44 years old[194]. Some studies also hypothesize that growth in vegan and paleo diets amongst young people is driven in part by bloggers and Instagram influencers who promote these diets[195].

There is also some evidence to suggest that idealised body images promoted on social media can impact food decision-making amongst Gen Z. A peer-reviewed study from 2017 based on semi-structured interviews with 10 high school students in Sweden aged 16-19 years found that young people recognise there is an unhealthy pressure to follow a ‘fitness hype’ fuelled by Instagram, including pressure to eat a healthy diet and lose weight[196]. In the face of that, young people aim to define their own concept of ‘life satisfaction’, though the article argues that this is not always enough to resist the negative consequences of this hype. However, overall evidence regarding the link between social media and mental health is limited, and there are no studies that specifically look at this in relation to Gen Z in the UK.

Some qualitative evidence about Gen Z, but not based on research with Gen Z suggests that the food choices of Gen Z are motivated by the information they are

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[193] Mintel. ‘Generation Z set to impact the future of food and drink innovation’. Mintel. (2018)

[194] FSA. ‘*Food and You. Wave 5, 2019’.* Food Standards Agency. (2019)

[195] Wiklund, E., and others. ‘Strong is the New Skinny: Navigating Fitness Hype Among Teenagers in Northern Sweden’. Journal of Sport, Education and Society. (2017)

[196] Wiklund, E., and others. ‘Strong is the New Skinny: Navigating Fitness Hype Among Teenagers in Northern Sweden’. Journal of Sport, Education and Society. (2017)

given about food. One UK study, based on a small number of interviews with stakeholders in the catering industry, notes the importance of accurate information in determining choices for this audience, in terms of what they are eating and the sustainability of the food and its packaging[197]. Another study based on polling with adults in the US also suggests that growing up online, Gen Z have an increased need for information, both in knowing what they put into their bodies, but also how their habits affect the environment[198]. However, there is little data to corroborate this, and there is also little evidence based on Gen Z in the UK.

Some evidence suggests that Gen Z are also influencers themselves. One market research report notes that Gen Z have a strong influence on family food budgets and family spending, especially when it comes to food and drink purchasing, however details of methodology and the sample size are unclear [199]. According to the study, 77% of parents said their children had a direct influence on their food and drink purchasing behaviour. However, peer-reviewed literature has long argued that children may influence what parents buy and families eat, and therefore suggests that this finding may not be specific to Gen Z[200] [201].

5.4 Food and health

Obesity is flatlining amongst Gen Z in the UK

A recent survey by the National Health Service (NHS) found that 16-24 year olds in the UK are the least likely adult age group to be obese, with 57% at normal weight and only 37% overweight or obese[202]. Despite growing up a time where obesity

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197 WWF. 'Catering for Sustainability: Making the Case for Sustainable Diets in Foodservice'. WWF. (2016)
198 Sun Branding Solutions. 'Gen Z Purchasing Power'. Sun Branding Solutions. (2018)
199 Barclays. 'Gen Z: Step Aside Millennials'. Barclays. (2018)
200 Valentine, G. 'Eating in: Home, consumption and identity'. The Sociological Review. Pages 491–524. (1999)
201 O'Connell, R., & Brannen, J. 'Food, Families and Work'. Bloomsbury. (2016)
202 NHS. 'Health Survey for England 2017'. NHS Digital. (2017)

levels are reported to be rising, it appears that obesity is flatlining amongst Gen Z. A report by a market research agency based in the UK found that in England, 36% of young adults are overweight or obese, which is almost exactly the same as Millennials in 2003[203]. Studies hypothesise this is partially linked to a decrease in free sugars (sugar added to food by manufacturers or consumers) and a decline in sugary drink consumption, with average of intake of free sugars among English children aged 11-18 years old in 2016 significantly lower than in 2010[204]. Other studies hypothesise that a levelling off in the rate of obesity is perhaps also due to Gen Z growing up at a time when health and wellness is a major part of mainstream society and media, and are learning behaviour from their parents who are more conscious of this issue than previous generations of parents had been[205]. Studies indeed show that healthy eating is encouraged by social norms[206].

Gen Z are drinking less alcohol

Historically and culturally drinking has been strongly associated with youth. However, there is some evidence to suggest that Gen Z are more likely to drink less or not at all compared to generations before them. The Health Survey for England (HSE) is an annual survey that looks at the changes in health and lifestyles of people across England, consisting of surveys with around 8,000 adults and 2,000 children. In 2017, the survey found that whilst there is a declining trend in the proportion of adults who have drunk alcohol in the last week, this varies by age and the biggest drop in alcohol consumption was among young people aged 16-24. According to the research, this fell from 65% in 1998 to 44% in 2017. The same survey suggests that

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[203] Duffy, B. and others. ‘Beyond Binary: The Lives and Choices of Gen Z’. Ipsos Mori. (2018)
[204] Duffy, B. and others. ‘Beyond Binary: The Lives and Choices of Gen Z’. Ipsos Mori. (2018)
[205] Mintel. ‘Generation Z set to impact the future of food and drink innovation’. Mintel. (2018)
[206] Quenia dos Santos, F. ‘Impact of Nudging Intervention and Factors Associated with Vegetable Dish Choice Among European Adolescents’. European Journal of Nutrition. (2019)

in 2017 just over one in four 16-24 year olds were teetotal, 8% more than were 10 years before[207].

There are a number of hypotheses as to what might be driving this. There is some evidence that suggests that young people who do drink, and drink heavily, are more likely to have unhealthier diets and that the decline in drinking could be due to increasing health awareness among young people and people making healthier lifestyle choices[208] [209]. According to a peer-reviewed study consisting online survey of 1,448 British or European students up to the age of 30 which examined dietary patterns, students who are heavy drinkers are more likely to smoke, eat-takeaways, eat pre-prepared foods and do less exercise[210]. A peer-reviewed analysis of repeated cross-sectional surveys of nearly 10,000 young people in the UK aged 16-24 years old in 2018 also found that people with different health behaviours showed some difference in terms of drinking. According to the research, non-drinking increased among non-smokers but not among young people who smoked, and rates of non-drinking also increased among those who did high levels of physical activity, but not those who did less exercise. However, while this may suggest differences in health awareness, it is undermined by the fact that non-drinking rates did also increase in people with low fruit and vegetable consumption and regardless of BMI.

Other evidence suggests it may be linked to Gen Z perceiving drinking as riskier than young people before them. Trend data from a survey with 30 UK secondary school children asking 11-15 year olds how risky they consider certain behaviours to be found that compared to Millennials at an equivalent point in 2004, younger Gen Z in

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[207] Health Survey. ‘Alcohol’. HSCIC. (2017)
[208] Shelton, N. and others. ‘Investigating the growing trend of non-drinking among young people; analysis of repeated cross-sectional surveys in England 2005-2015’. BMC Public Health. (2018)
[209] NHS. ‘Young people turning their backs on alcohol’. NHS. (2018)
[210] Sprake, E., and others. ‘Dietary patterns of university students in the UK: a cross-sectional study’. Nutritional Journal. (2018

2018 are less worried on most measures, except binge-drinking[211]. The survey found that with 70% of current Gen Z thinking binge drinking is very risky compared to 56% of Millennials in 2004, Gen Z are in fact much more likely to think binge-drinking is high-risk than Millennials. A market research report based on a survey of 1,381 people looking into attitudes to alcohol in the UK in 2018 suggests that the decrease in alcohol consumption can partly be explained by the fact that at 83%, Gen Z are more likely to consider mental health to be just as important as their physical health compared to 47% of Gen Y/X[212]. The same survey suggests that the decrease could also be driven by a concern about online image, with 51% of Gen Z saying their online image is always at the back of their minds when they go out drinking. The authors of the report have hypothesised that the decrease could also be explained by the fact that Gen Z experience fewer rituals associated with drinking culture, as a result of wider societal changes, including less pressure to drink after work[213].

The same study also suggests that when Gen Z do drink, they are more likely to drink premium drinks, including cocktails. In a small study of bar managers, more than two-thirds of bar managers surveyed reported an increase in demand for cocktails and 72% reported an increase in demand for premium drinks, although this was not specific to young people[214]. Some reports link the preference for more premium drinks with the idea that Gen Z embrace quality over quantity, and have an increased focus on price and experiences, which can lead to a preference of savouring their drinks rather than bingeing on cheaper alternatives[215].

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[211] Duffy, B. and others. ‘Beyond Binary: The Lives and Choices of Gen Z’. Ipsos Mori. (2018)

[212] Magee, K. ‘Drinks brands’ changing strategy to attract Gen Z’ Campaign Live. (2019)

[213] Morton, A. ‘Drinks industry will have to ‘recalibrate’ as Gen Z makes mental health a priority’. Just Drinks. (2019)

[214] Magee, K. ‘Drinks brands’ changing strategy to attract Gen Z’ Campaign Live. (2019)

[215] Burnie, A. ‘Gen Z Attitudes Towards Booze Forcing Brands to Change Their Marketing Tactics’. Red Brick Road. (2019)

5.5 Summary of main findings

- There is strong evidence to suggest that Gen Z are eating a typically teenage diet, characterised by relatively low intake of fresh fruit and vegetable and relatively high intake of processed foods, including burgers and pre-packed sandwiches. There is some evidence to suggest that this is down to life stage rather than a cohort effect, and that the likelihood of eating 'healthier' diets increases with age, as the ability to afford balanced meals also increases.
- Evidence suggests that Gen Z are more likely to be vegetarian compared to those aged 55+, and that Gen Z and Millennials are slightly more likely to be vegan compared to older age-groups. However, the same data also shows that Gen Z are also slightly less likely to be vegetarian or flexitarian compared to those aged 25-34 and 35-44. Despite this, the differences between age groups are not large enough to draw any significant conclusions, and evidence around the motivation behind vegetarianism and veganism amongst Gen Z is also inconclusive.
- Eating out, takeaways and fast food are established elements of eating habits amongst Gen Z, and evidence suggests that the likelihood of consuming takeaways once or twice a week increases amongst Gen Z from the lowest equivalised household income. Related to this, data also suggests that the ability and willingness to cook amongst Gen Z is lower compared to other age-groups. It is unclear whether this is a result of life stage or whether this is related to a cohort effect.
- Price and social media have a strong influence on the food choices made by Gen Z, and especially compared to other age-groups. Whilst price has a direct impact on their shopping habits and what they purchase, evidence suggests that social media has an influence on deciding where to eat and provides inspiration.
- Despite concerns, data suggests that obesity is flat-lining and that levels of obesity are the same as Millennials in 2003. Evidence suggests this could

be linked to a decrease in consumption of free sugars and sugary soft drinks.

- Evidence also suggests that Gen Z are drinking less alcohol than previous generations. Some peer-reviewed evidence suggests this may be due to increasing health awareness among young people and people making healthier lifestyle choices. There are also other hypotheses as to what might be driving this, including Gen Z seeing drinking as riskier, being more concerned about their physical and mental health, being concerned about their online image and growing up in a world where social and cultural norms are less dependent on and influenced by alcohol.
- However, an absence of longitudinal studies examining food consumption amongst those aged 16-25 years old makes it difficult to assess whether there are any cohort effects, and whether the majority of the findings in this chapter are true generational differences.

6. Conclusions

Beyond the ‘hype’

Generational research, that uses cohorts such as ‘Millennials’ or ‘Gen Z’ as analytical categories, is well-established in market research for brands. As a result, much of the existing literature about Gen Z focuses on them as current and future consumers, predominantly exploring their consumption habits and preferences. As the first ‘true digital natives’, there is also a great deal of interest in how technological shifts have influenced Gen Z’s identity, attitudes and behaviours, and the ways in which they use social media to engage with brands. While practices vary, such reports are liable to exaggerate claims about Gen Z, contributing to widely used narratives about this cohort that are often weakly evidenced. In addition, within this literature there is very little attention paid to the extent to which findings are a ‘cohort effect’ (i.e. a phenomenon particular to a generation) or a ‘period effect’ (i.e. is this shift happening to everyone) or a ‘life-cycle effect’ (i.e. have young people always been like this?).

In contrast, there are relatively few peer-reviewed studies that focus on Gen Z, which are more likely to consider this age cohort as citizens or policy-subjects rather than as consumers. The academic literature that does exist about this age-group often comes from a health policy perspective, looking at public health trends over time. Other academic sources tend to be based on small-scale, qualitative studies with a focus on studying reported behaviour. There are very few longitudinal studies available that include or report on Gen Z, meaning it is still uncertain whether any shifts can be attributed to generational effects.

With these caveats in mind, the REA identified a number of emerging themes and hypotheses that surround Gen Z that relate to their values, their behaviours, and their consumption habits, that are relevant to understanding their engagement with the food system:

- The most robust evidence about Gen Z is in relation to the observed reduction in ‘risky’ behaviours compared to past generations of young people, with decreases in rates of smoking and drinking leading to Gen Z being referred to ‘Generation Sensible’. Evidence suggests these trends may be associated with shifts in attitudes as well as changes to pricing and affordability.
- Gen Z are more progressive than older generations, expressing greater levels of support for gender equality, diversity and LGBT+ rights and may have more ‘fluid’ identities. Evidence related to changes in attitudes also suggests that Gen Z have stronger views about the need to protect the environment. Moreover, whilst Gen Z may have strongly stated beliefs, there is some evidence to suggest that beliefs are not always translated into action. However, it is unclear from the existing evidence whether these differences reflect the radicalism and optimism of youth, or are distinct to Gen Z.
- Overall Gen Z are spending more time online than older generations and are more likely than older generations to be communicating and moving away from Facebook. Despite, or because of the amount of time spent online, some evidence also suggests Gen Z are trying to limit their time online and on social media.

- The relatively limited data also suggests that whilst Gen Z do shop online, they are also more likely to say they enjoy in-store and high-street shopping compared to other generations, although it is unclear whether this specific to Gen Z or due to their life-stage. Gen Z also seem to be following in the footsteps of Millennials in the way they purchase more online and via applications, and they also prioritise speed and free delivery. Whilst there is some suggestion that Gen Z have a preference for individualised products, there is very little robust data on the consumption habits of Gen Z, and specifically Gen Z in the UK.
- Obesity amongst this age-group obesity is flat-lining, with current obesity levels amongst Gen Z the same as for Millennials in 2003. It appears that this may be linked to a decrease in the consumption of sugar (particularly sugar in soft drinks), as this generation has grown up during public health campaigns targeting sugar consumption.
- When it comes to food, it appears Gen Z have ‘typically teenage’ diets, characterised by lower intakes of fresh fruit and vegetables than other age groups, and high levels of eating out, takeaways and the consumption of pre-packed sandwiches, ready meals and burgers. However, whilst a lack of longitudinal data make the nature of differences between age groups difficult to assess, high levels of eating out, unhealthy eating and low levels of ability and willingness to cook are likely to be strongly influenced by life-stage.
- Whilst there seems to be an overall increase in the number of people saying they follow diets that are free from animal products, data suggests that Gen Z are as likely as Millennials to be vegan but are slightly less likely to be vegetarian or flexitarian compared to Millennials. Based on current evidence it does not seem that there is a step-change or sudden increase in these diets among Gen Z, compared to Millennials.
- Again, the data around what influences food purchase and consumption amongst Gen Z is limited, but current research suggests that both price and social media have a significant influence on the foods they buy and eat. It is unclear how this compares to previous generations of a similar age and whether this reflects cohort or life-stage effects or wider economic changes, including reduced disposable incomes and affordability of food.

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