

CHICKEN 2035: Anticipating TRENDS, Adapting STRATEGIES

**CHICKEN
MARKETING
SUMMIT**

July 29-31, 2024

Renaissance Birmingham Ross Bridge
Golf Resort & Spa



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Meet Your Future Consumer

Communications Implications for Your Business
Presented by Michele Murray
Ketchum Food Ag & Ingredient Practice Leader

July 30, 2024

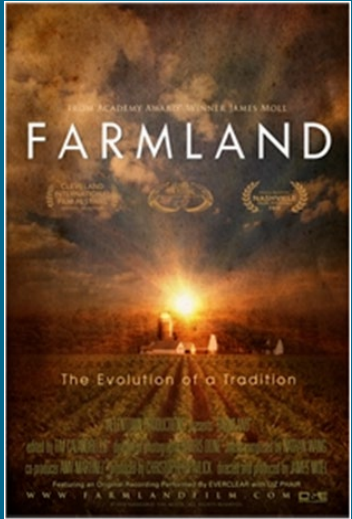
WE ARE FOOD CURIOUS.

KETCHUM

Bringing groundbreaking ideas to life

Creating iconic campaigns that make a difference

Setting the conversation around food and nutrition



PRovoke

Ketchum Leads In Innovation With 27 IN2 SABRE Nominations

2023 **Creative PR Agency** of the Year



Winner



40 **Cannes Lions** in the past three years

THE SABRE AWARDS

2023 **Large Agency** of the Year
2023 **Data Driven** Agency of the Year
2023 **Campaign Measurement Tools**
2023 **Creative Global Agency**

amec
AWARDS | 2023
GLOBAL COMMUNICATION EFFECTIVENESS

6 Gold Medals
2 Silver Medals
2 Bronze Medals

SILVER ANVIL AWARDS

2023 **Best Mega Agency**



**Gen Z
doesn't
trust you.**

73%

believe that food companies are greedy and only care about profits.



49%

believe that farmers
are greedy and only
care about profits.



72%

believe that our
food system is broken.



They're distrustful of other industries too


Gen Z doesn't trust big business

Gen Z's Distrust in Higher Ed a 'Red Flag'

A new survey report concludes that younger generations are less likely to trust higher education and that college and university administrators will have to work harder to earn their trust.

Gen Z Adults Seem to Be Less Trusting of Brands Than Others

Survey Shows Young Adults Feel Lack of Trust in Government

A young woman with braided hair, wearing an orange shirt and sunglasses on her head, is smiling and holding a slice of pizza. In the background, a man wearing a blue beanie and a white shirt is also holding a slice of pizza. The scene is outdoors, possibly at a food stand or market.

However, they
represent a big
opportunity

\$360
BILLION

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HOW?

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42%

don't believe that
food companies
understand them



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Methodology

Ketchum Analytics conducted a study among 2,000 nationally representative U.S. children and adults, ages 13+. The survey was in field from 4/7 - 4/18 with margins of error at 95% confidence level.

Generations referenced throughout this presentation are defined as follows:

GENERATION

AGE

Gen Z

13-26

Millennial

27-42

Gen X

43-58

Boomer

59-77

Issues such as climate change, worker's rights and animal welfare have captured Gen Z's concern, but not their wallet.





"Say-Eat Gap"

While most Gen Zers say sustainability is important to their food choices ...

Important actions for food brands to take

72% 

Use sustainable packaging

71% 

Limit its impact on environment

74% 

Sustainably source ingredients



Only **16%** say they look for sustainably sourced ingredients on packaging

11% say that environmental impact has affected their eating pattern

Nearly three-in-four Gen Zers say it's important for food brands to support animal welfare



73%

Support animal welfare

Yet only one-in-20 have changed their behavior

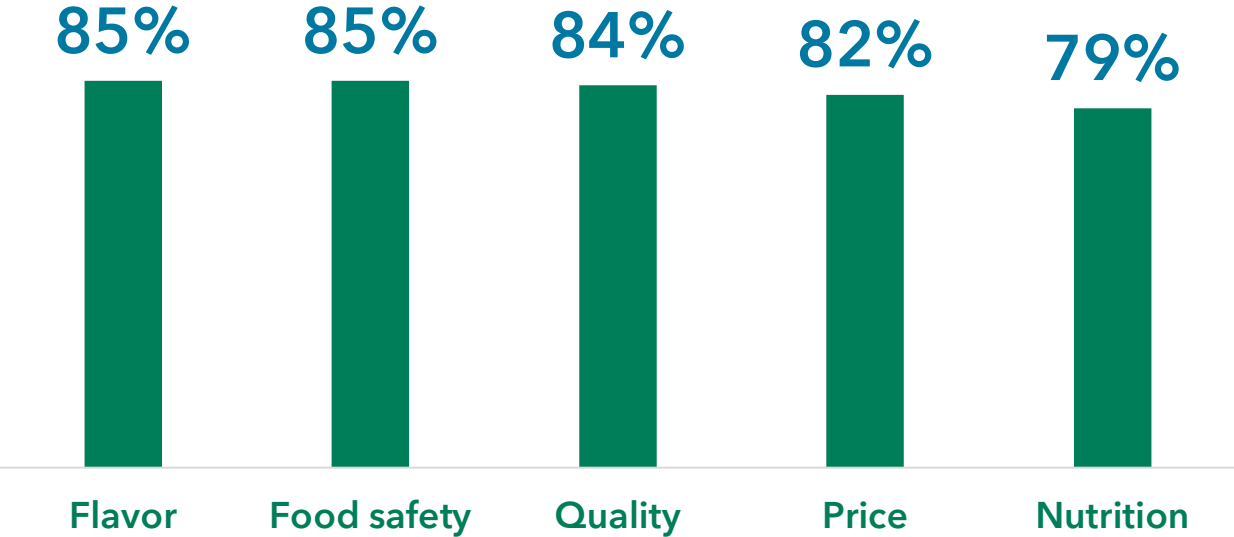


5%

Say animal welfare has impacted their eating pattern

More practical factors influence purchase decisions

Factors important to purchasing food products



...and impact eating patterns.

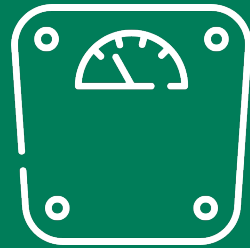
28%

Cost/affordability



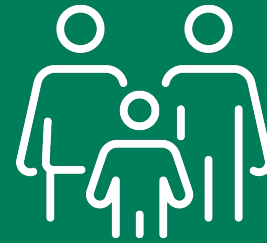
27%

Weight management



27%

My parents



20%

Convenience



Leading to more pressures
on this stressed-out generation

A majority feel powerless

63%

Feel too much pressure to change the world through their behaviors

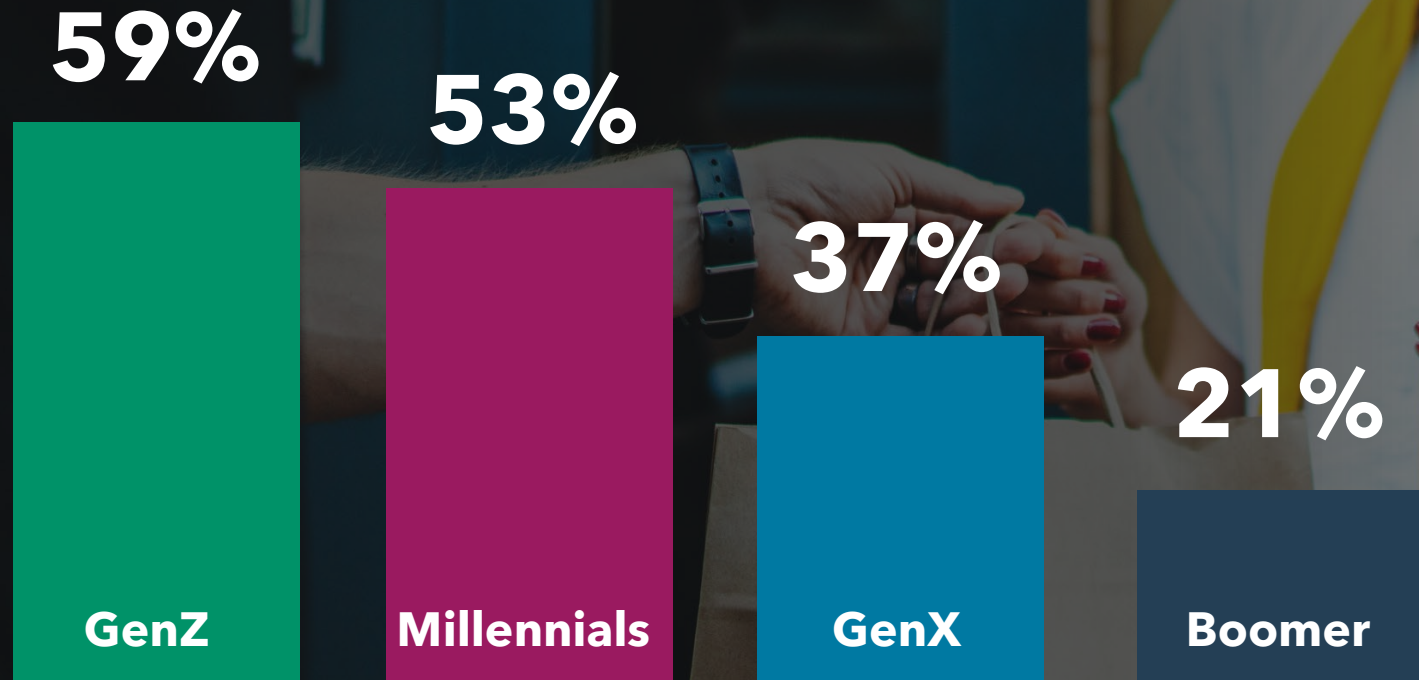


65%

Don't believe there's much they can do as individuals to reverse climate change

They also feel judged about their food choices.

Agree with the following statements

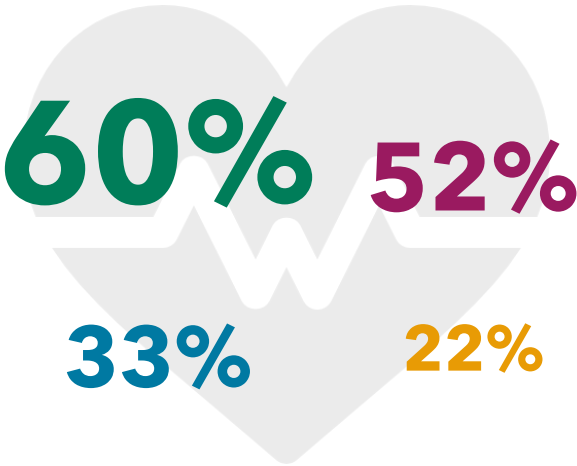


I often feel judged by others for my eating patterns

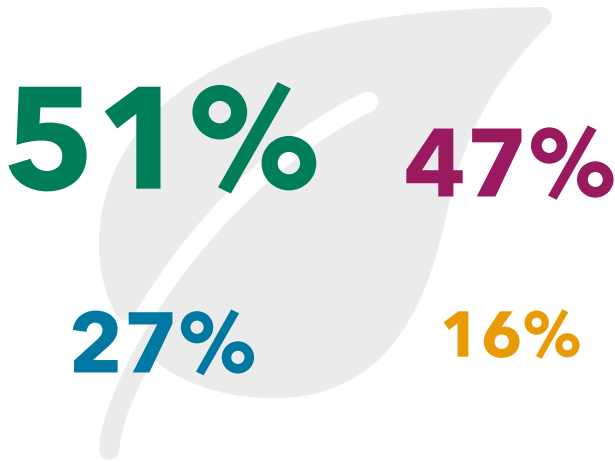
More than other generations, Gen Z feel pressure for their food to make a statement about who they are and what they care about.

I feel pressure from others to eat a certain way to ...

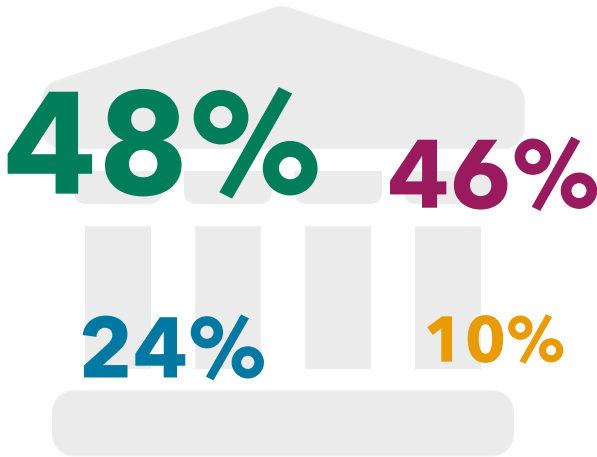
be perceived as healthy



show I care about the environment

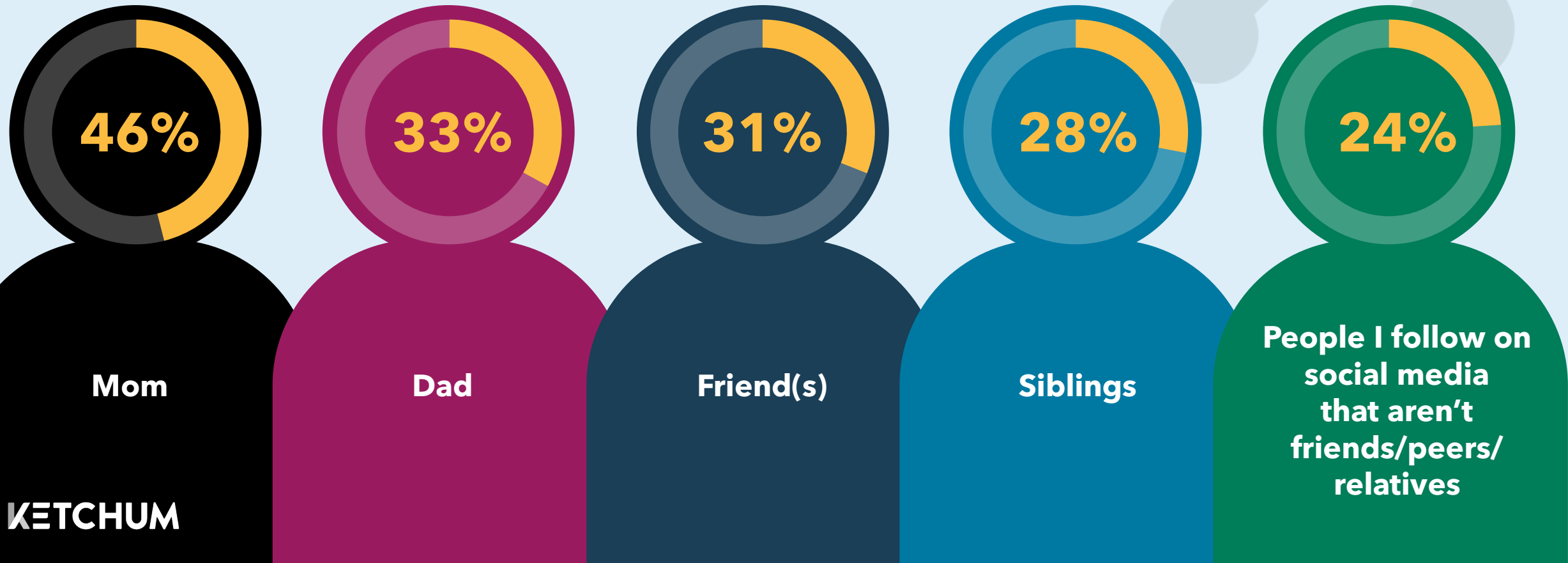


I care about certain political issues



While most Gen Z experience food pressure from their parents and friends, a quarter are pressured by people they follow on social media who they don't know.

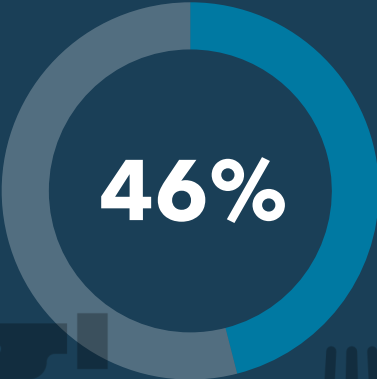
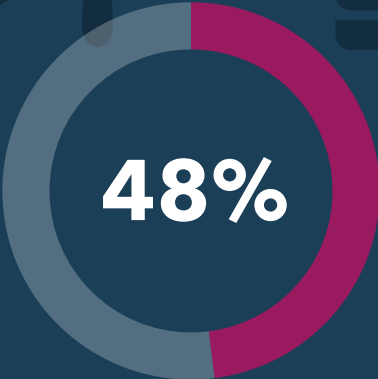
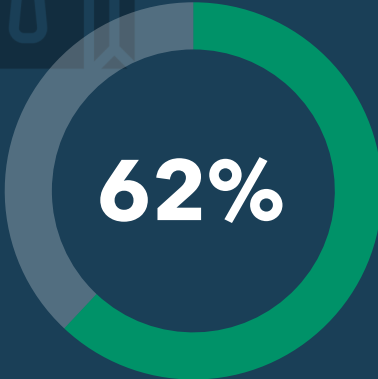
Source of food pressures



Which leads to negative emotions about food

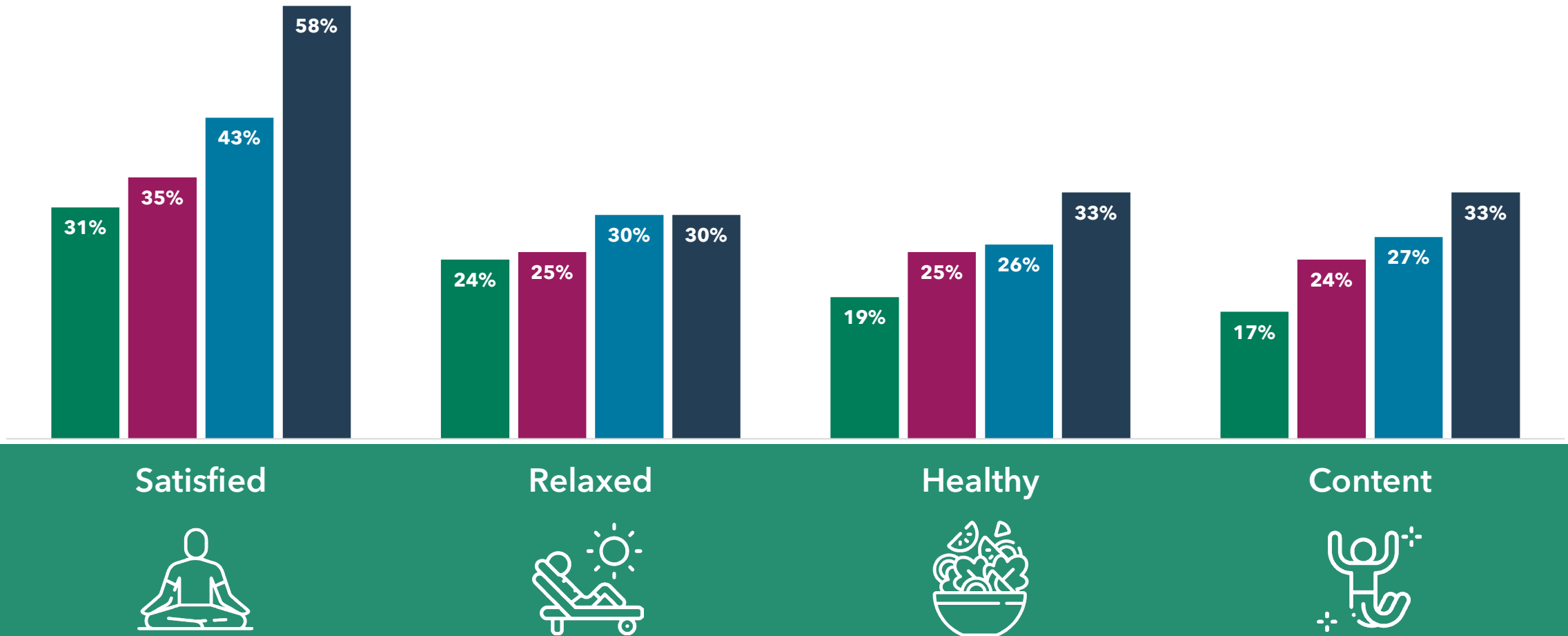
Gen Z is more likely than other generations to feel like their eating pattern is "wrong."

Agree with the following statement: I feel like my eating pattern is "wrong"



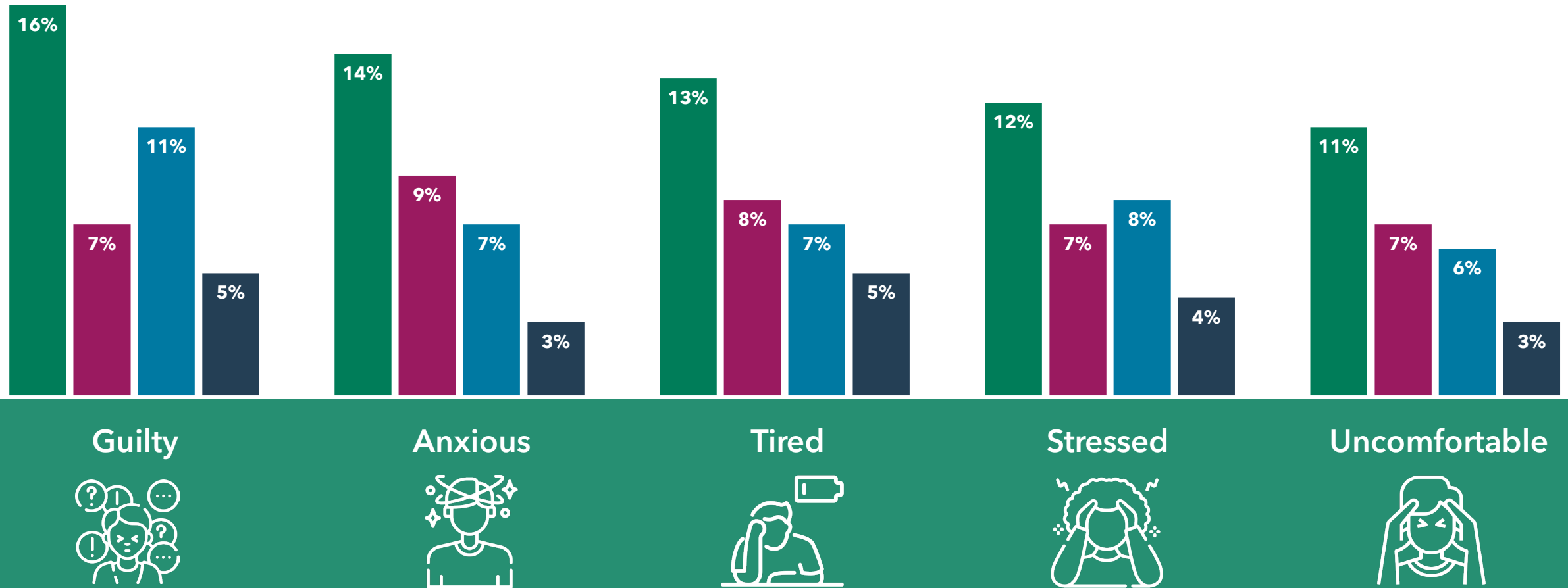
They're less likely than older generations to say that food makes them feel positive emotions.

How does food make you currently feel?



Meanwhile, they're more likely to say that food makes them feel negative.

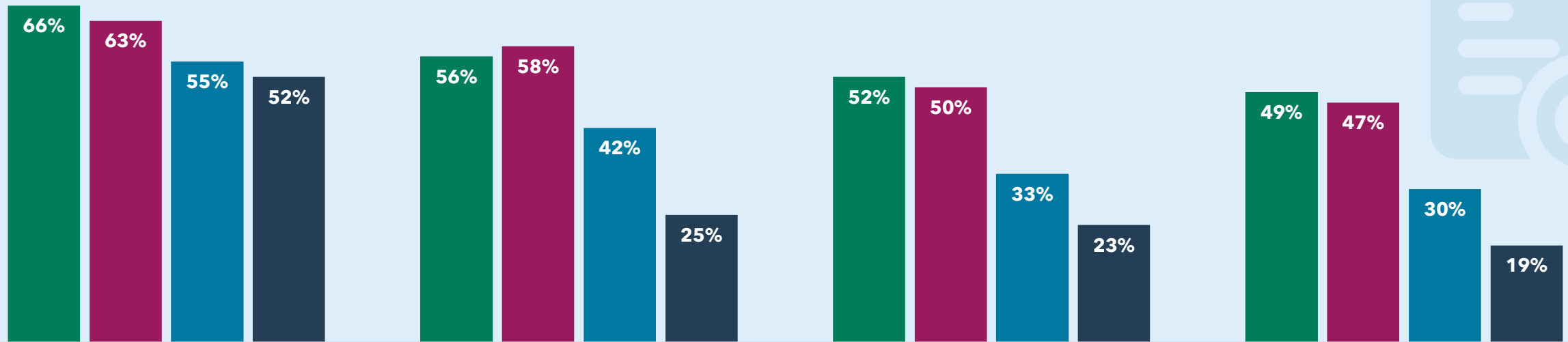
How does food make you currently feel? Negative Attributes



Where are they
getting their
information?

They're more likely to research before purchasing, but having trouble finding the information they desire.

Agreement with the following statements (Top 2 Box)



It is hard to find information about how the food I buy is raised and produced in the U.S.



I research sustainability practices before buying a new brand



I have stopped purchasing food products I like because they were unsustainable



Farmers are greedy and just care about profits

They're influenced by
social media

70%

Follow an online influencer
for their food content

More willing to trust a food
trend that have gone "viral"

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Social media is stress-inducing for most Gen Zers

67%

Worry they spend too much time on social media

58%

Believe that social media has a negative impact on their body image

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All of this pressure affects some groups more than others.

Gen Z women feel more pressure to eat and look a certain way compared to men.

Agreement with the following statements

I am afraid of gaining weight

I don't feel comfortable in my own body

Influences from my childhood have impacted my relationship with food today

Social Media has a negative impact on my body image

Food is anxiety inducing for me

WOMEN



71%

66%

62%

62%

56%

MEN



59%

54%

60%

51%

46%

Gen Z men feel more confident than Gen Z women ...

Agreement with the following statements

I am very skilled at cooking

I am confident in my ability to make healthy food choices

I feel like my eating pattern is "wrong"

I have a positive relationship with food

MEN



76%

72%

56%

71%

WOMEN



60%

63%

65%

59%

The effects of this new food environment

They're foodies

73%

Like making new dishes and experimenting in the kitchen

62%

Enjoy trying new restaurants

63%

Enjoy trying new types of cuisines

84%

Interested in other cultures/ countries

They're forging their own food future.



68%

Cook differently
from their parents



55%

Piece together
snacks into a meal
on a weekly basis



Only 20%

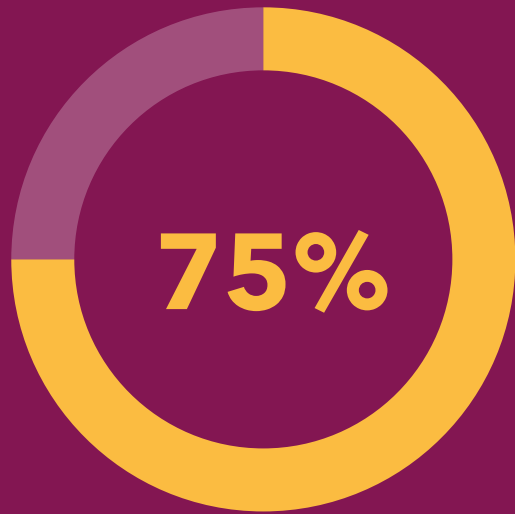
Say their childhood
diet impacts their
current eating pattern

Gen Z, who are forming their "go-to's" are the least connected to chicken.

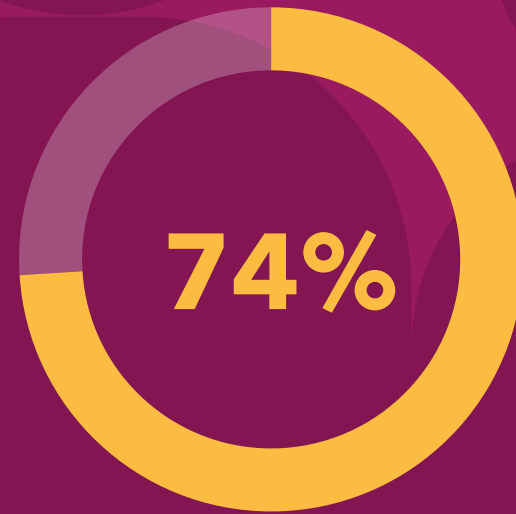
By Generation: Which of the following best describes how you feel about chicken?

STATEMENTS	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS	SILENT GENERATION
I can't live without it	15%	11%	14%	8%	3%
I enjoy eating it	56%	71%	72%	78%	85%
I can take it or leave it	17%	12%	12%	12%	11%
I eat it if I'm forced to/there are no other options	11%	5%	2%	2%	0%
I can't stand it	1%	0%	0%	0%	1%

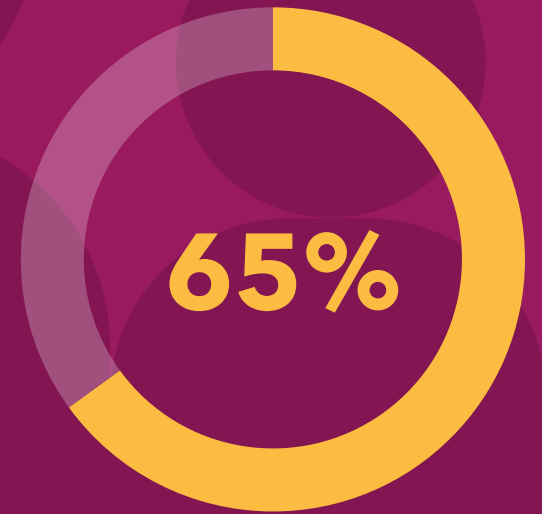
They see themselves as influencers.



Agree that they're a leader, not a follower



I influence my friends and family to try the things I like



I like to be the first to try new things

They're influencing.

In 2013, Ketchum revealed that 22% of the population were classified as "Food eVangelists," or people who considered themselves change agents who influenced other's food decisions.

That's more than double today ...



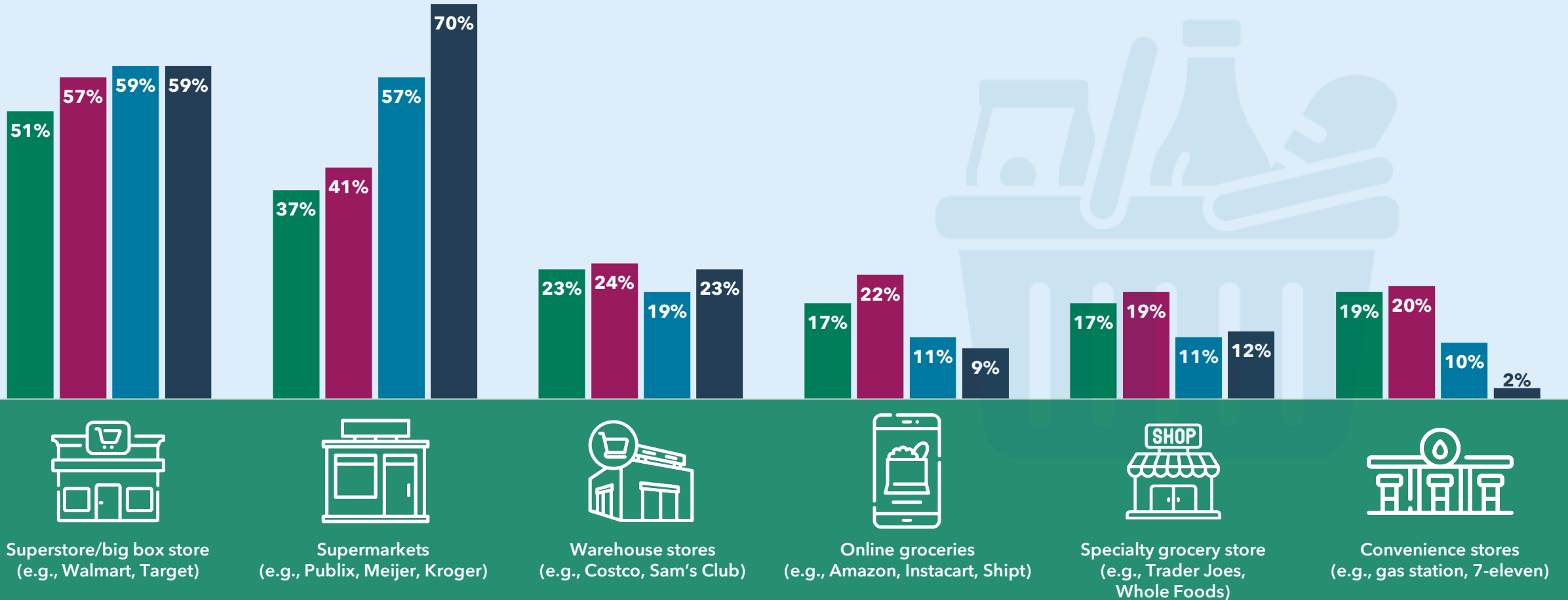
49%

**Are Food
eVangelists**

(vs. 21% of Gen X, 9% of Boomers and 32% of the total population)

They're shopping differently.

Where do you buy/get most of your groceries?



They don't maintain a strict shopping schedule or grocery budget.

Agreement with the following statements (Top 2 Box)

I don't have a regular grocery store routine and only go when I need to

61% Gen Z

59% Millennials

56% Gen X

53% Boomers

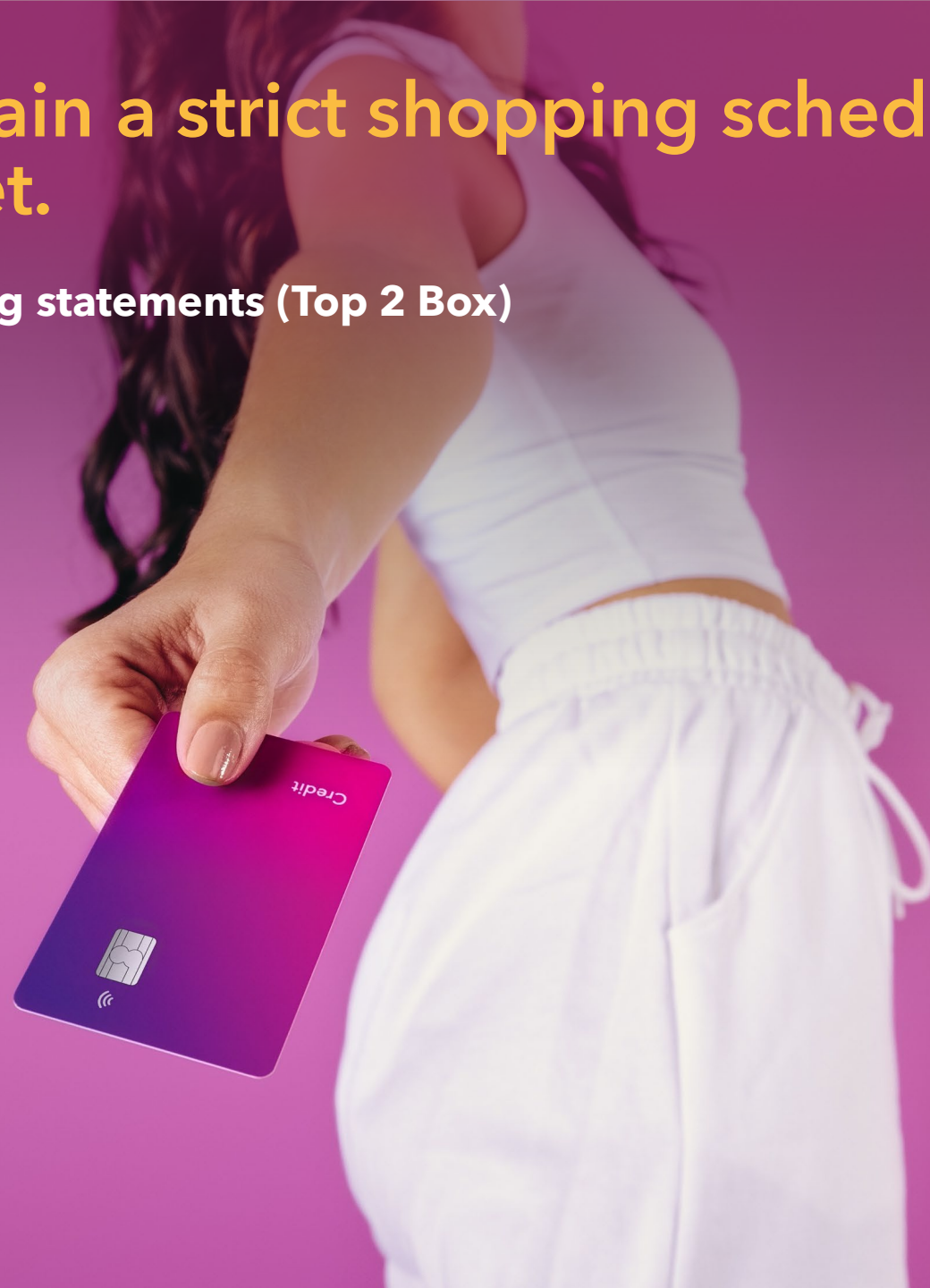
I have a strict budget for groceries

45% Gen Z

63% Millennials

60% Gen X

51% Boomers



Gen Z spend more than they have.

56% regularly spend more than they intend to on groceries

59% spend more than they intend to on eating out

49% regularly spend more than they would like on to go orders

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50%

sometimes worry they won't be able to afford food for the week.

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Recommended Actions

Meet them where they are ...



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Recognize their influence but with caution

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Help them see the impact of their individual behavior

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They're sophisticated, savvy and singing their own tune.



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But they lack the skills and the confidence.



Joy! Joy! Joy! (That's accessible)



KETCHUM

KETCHUM

Thank you!

Let's stay in touch:

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Michele.murray@ketchum.com

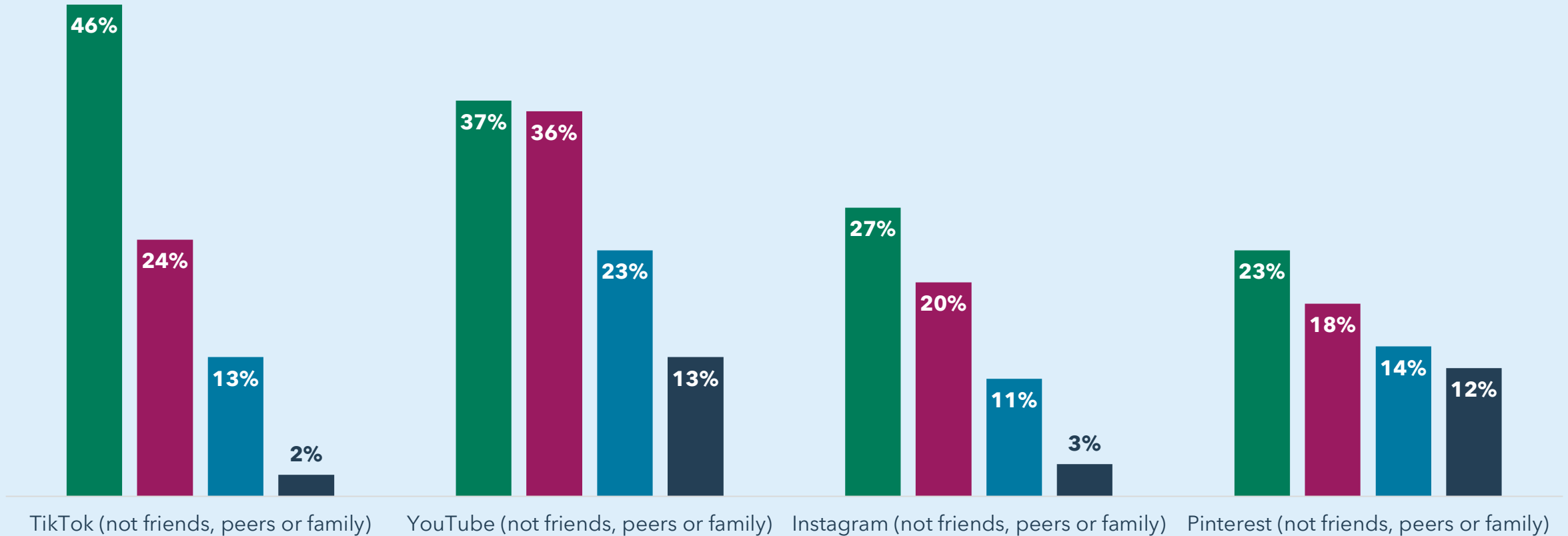
303-880-9159

LinkedIn: <https://www.linkedin.com/in/michele-peterson-murray-b580552/>

Let's Talk.

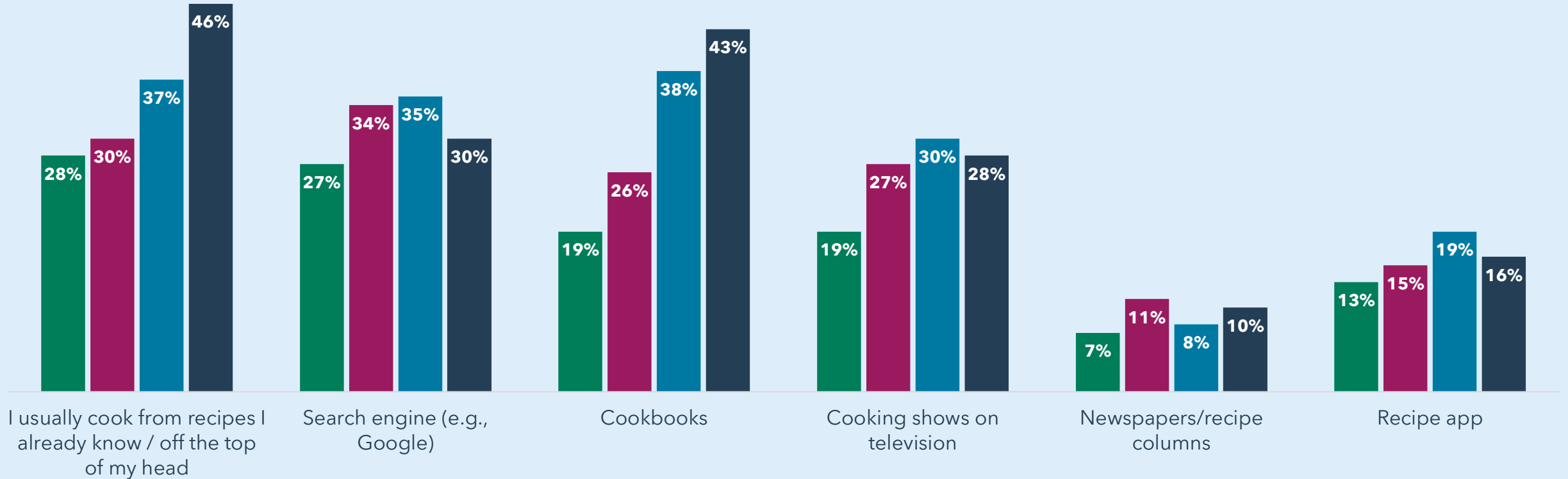
They are more likely to look to social media for inspiration

Where do you get your recipe ideas / inspiration?



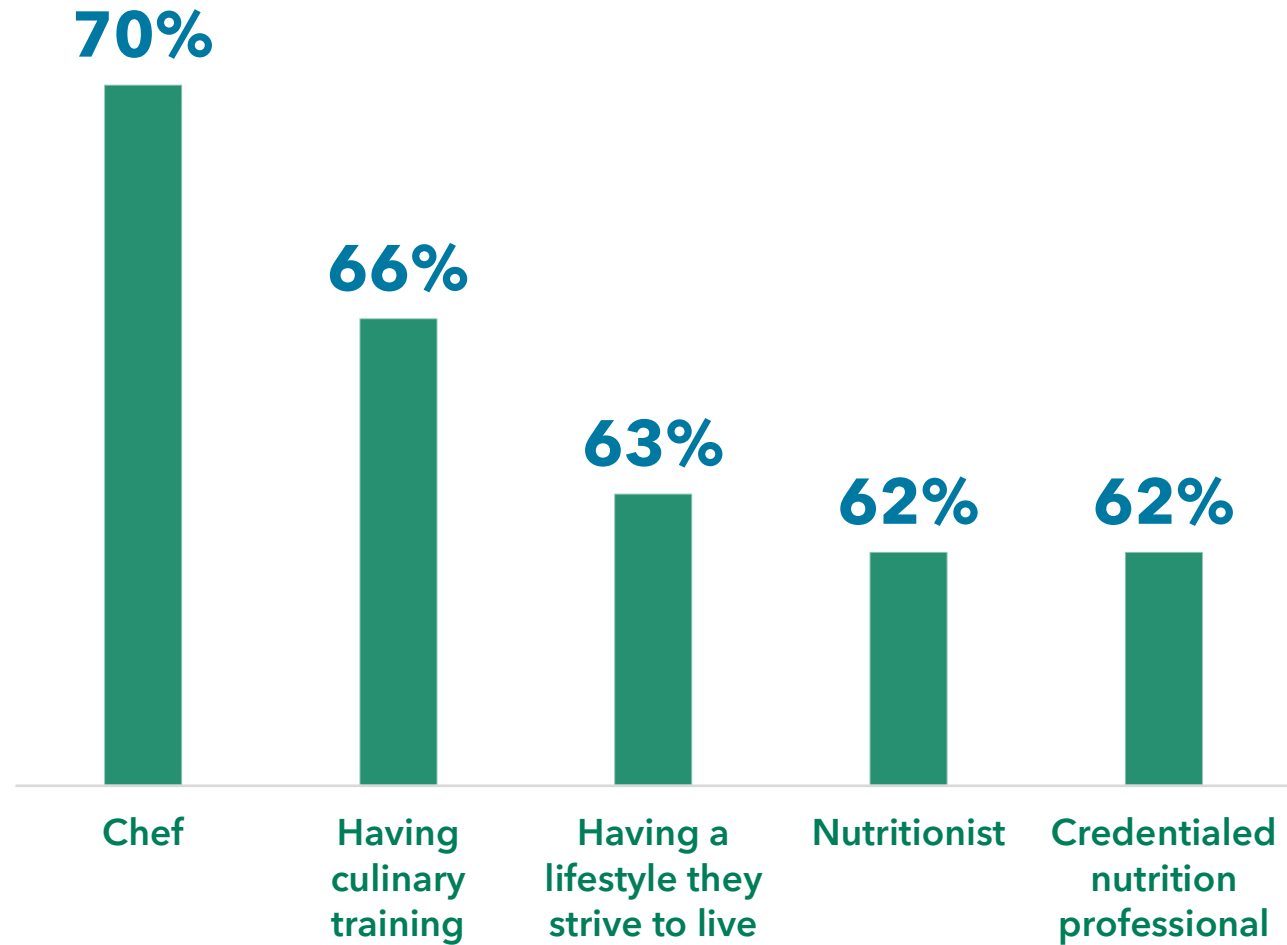
And less likely to use traditional sources

Where do you get your recipe ideas / inspiration?



Most Trusted Messengers

Who Gen Z trusts online most when it comes to food content

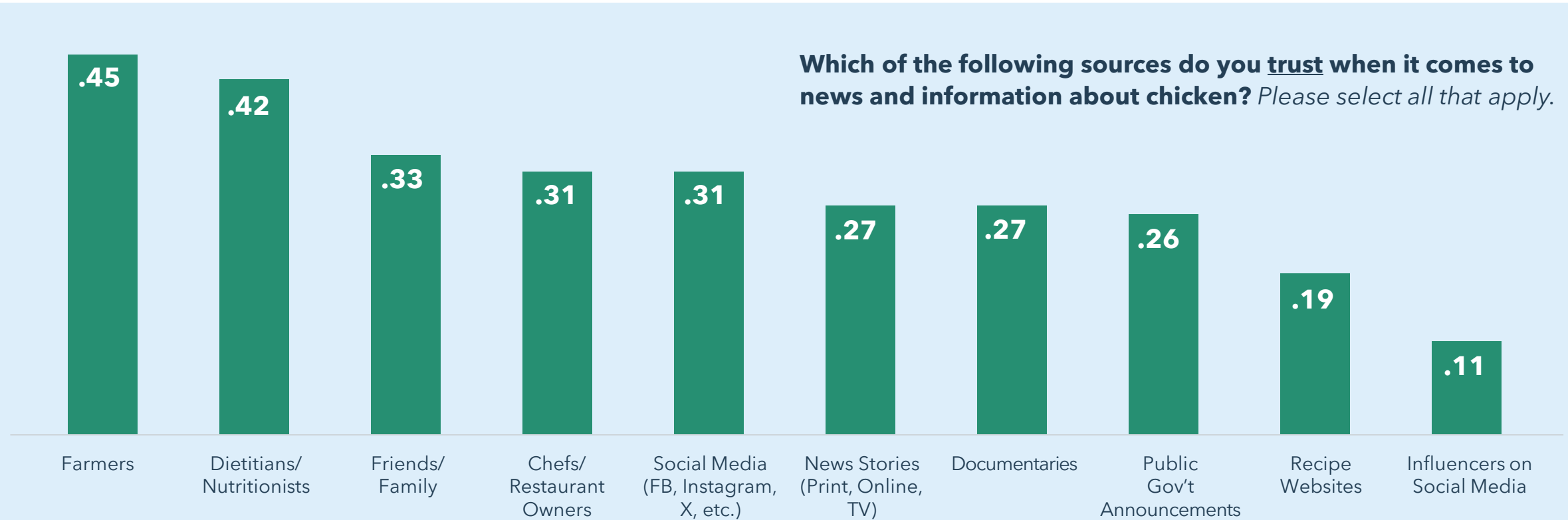


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Trust in sources of information

Scientists, RDs and farmers are powerful advocates to help deliver chicken's messages




Gen Z respondents indicate that their highest level of trust for chicken information is **farmers** (45%), **dietitians/nutritionists** (42%) and **research studies** (39%).

Chicken pricing is driving the most volume by far...

Conversations focused on rising poultry costs rather than a specific issue impacting our license to operate. However, *Salmonella* is an entry point given consumer concern and the existing regulatory environment.

Topics Volume Comparison (May 2022-May 2023)

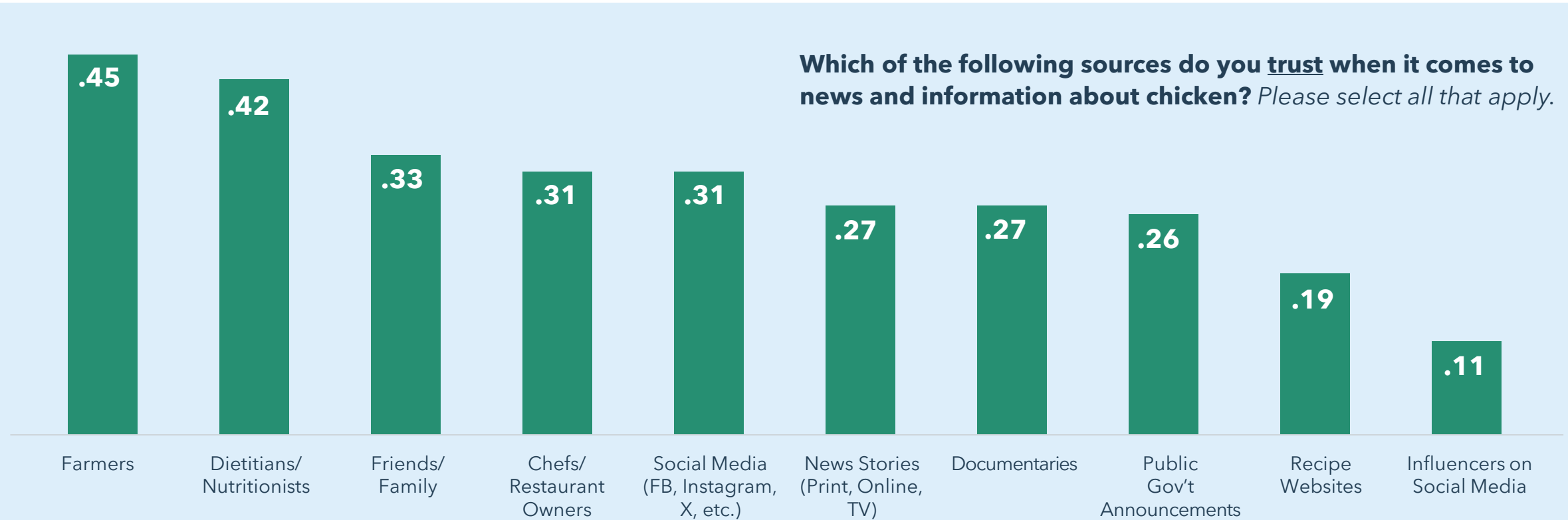


	Line Speeds	Salmonella	Bird Flu	Antibiotics	Sustainability	Animal Welfare	Chicken Pricing
Social Media	664	2,000	2,291	133	685	1,423	20,500
Traditional Media	381	3,000	7,013	1,920	9,329	4,884	55,400

While social media is a reactive environment where consumers share concerns about overpricing, traditional media often connects the dots between chicken pricing and wider pricing conversations across the supply chain.

Trust in sources of information

Scientists, RDs and farmers are powerful advocates to help deliver chicken's messages



Gen Z respondents indicate that their highest level of trust for chicken information is **farmers** (45%), **dietitians/nutritionists** (42%) and **research studies** (39%).

Gen Z are less likely than other generations to look for labels about sustainability on-pack



22%

consider the label
locally grown



19%

consider Non-GMO



17%

consider certified
naturally grown



16%

consider grass-fed

They're on the relentless hunt for something more.

While they currently have conflicted feelings about food, Gen Z wants it to make them feel joyful, accomplished, optimistic, excited and guilt-free.

How Gen Z wants food to make them feel

48%
Happy



45%
Heathy



41%
Satisfied



38%
Energized



34%
Joyful



33%
Confident

