

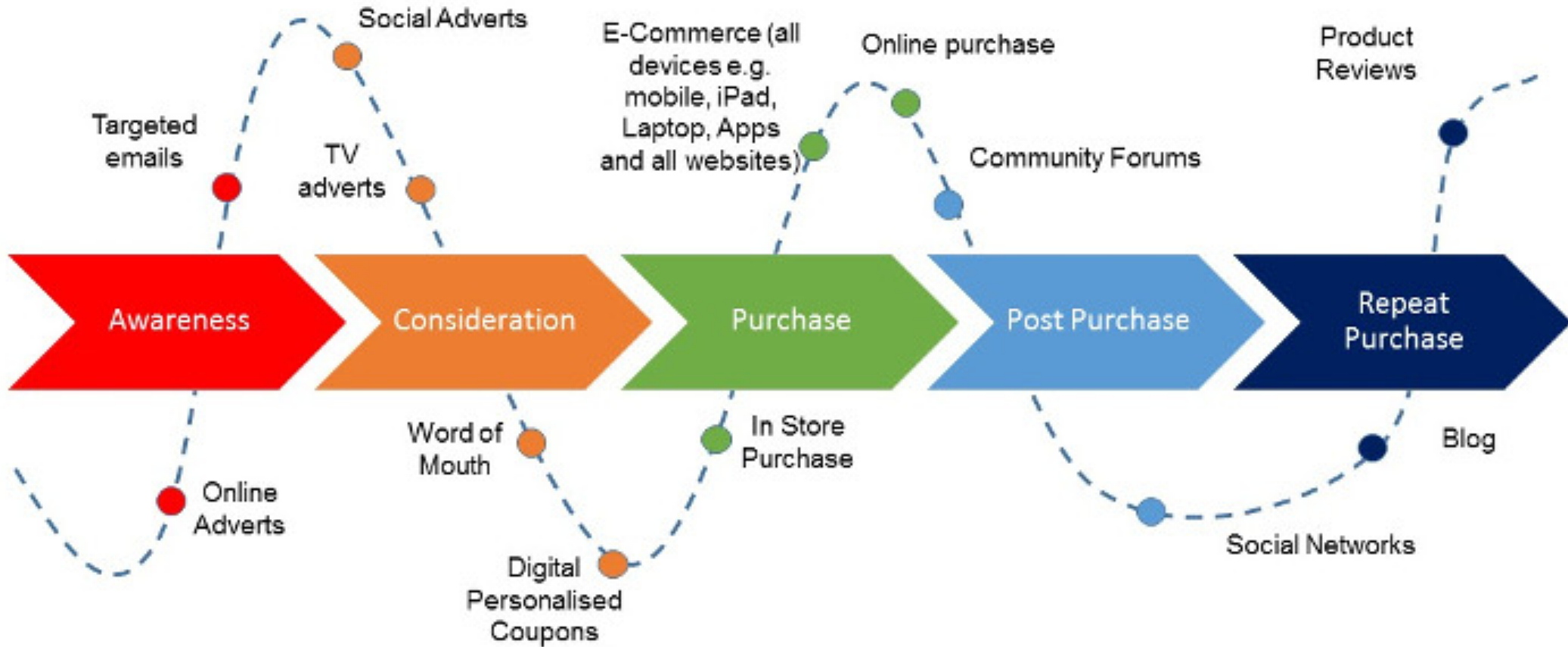
Understanding the New Path to Purchase



**WHY SHOULD I
CARE WHAT SHE
HAS TO SAY?**

Traditional Path to Purchase

Traditional Path to Purchase





Social Media/
e-WOM

E-commerce

Distrust

Information
Access

Pandemic

Economy



**86% of Gen Z experiences
some sort of anxiety**

**48% of Gen Z feels anxious
all the time**

Gen Z Feels pressure...

60%

to eat a certain way to “show”
that they’re healthy

51%

to care about the environment

48%

to care about certain political issues

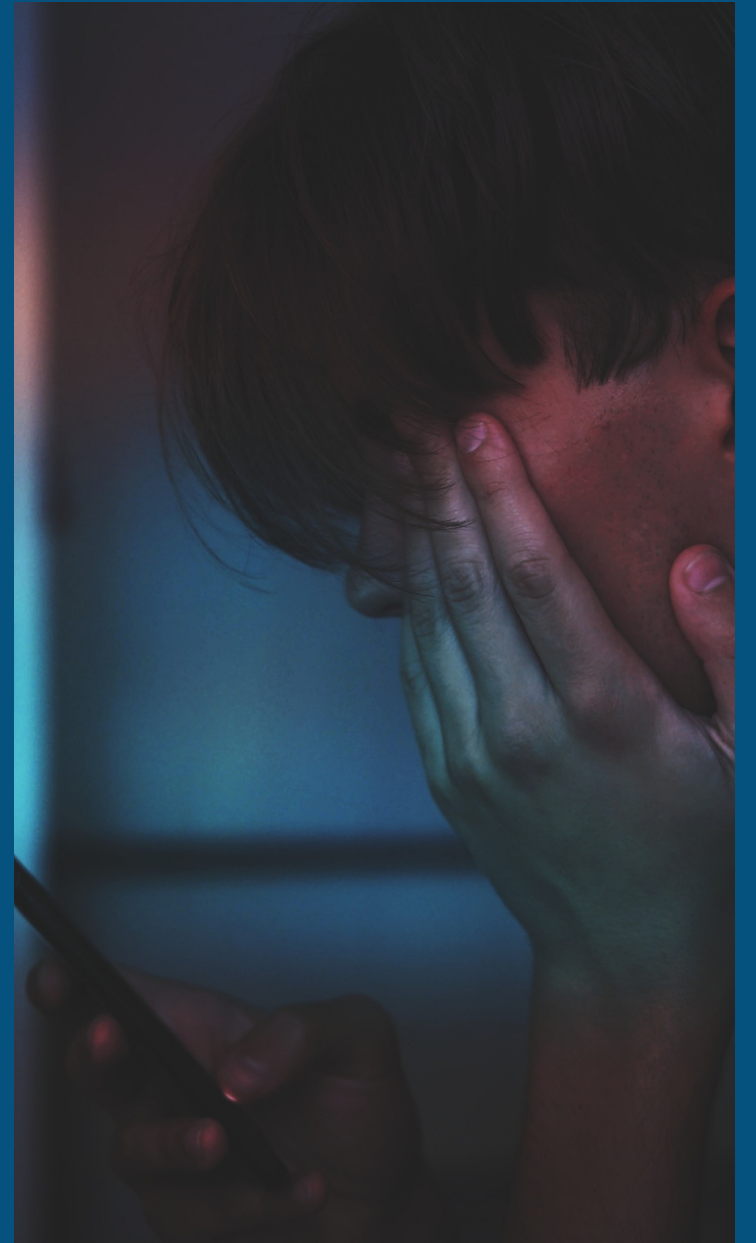
25

about the food choices they make from
strangers on social media

%

Decision fatigue

Menu anxiety



Over 66% feel
like their eating
patterns are
wrong...



Gen Z is more likely than any other generation to attribute negative emotions, and less likely to attribute positive emotions, to food



Inspiration & Exploration

“...consumption today is an infinite loop of *inspiration, exploration, community & loyalty.*”

“...brands winning with Gen Z are those creating content and activations that touch each one.”

Source: Vogue Business/ Archrival







Of Gen Z do a lot of research before making a purchase

66%

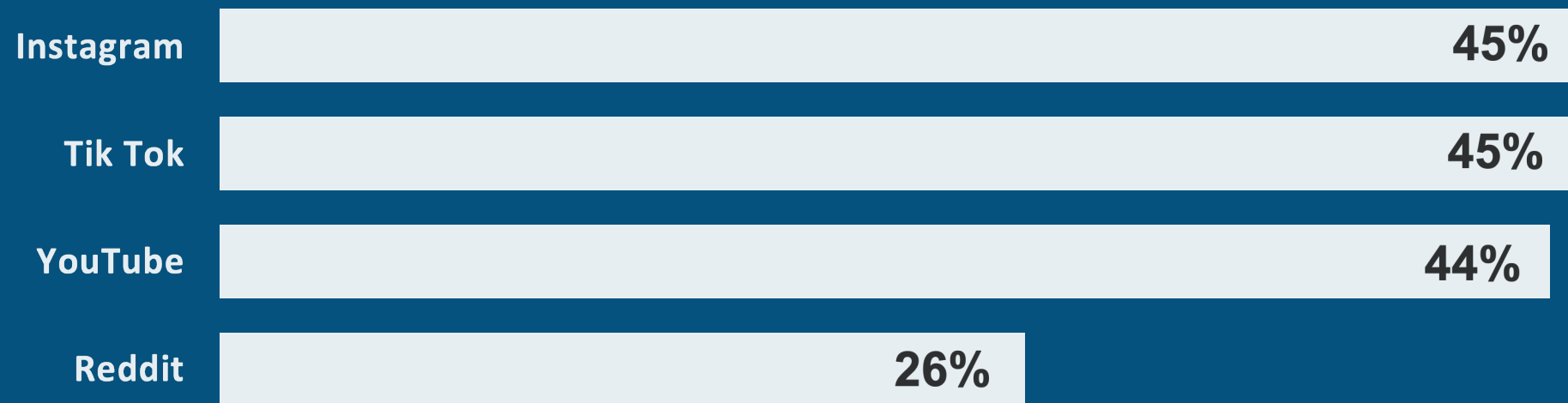


Look at menus online before visiting a restaurant

58%

Top Sources for Researching Products

Gen Z – Have you used any of these to research a food/ beverage producer restaurant before you purchased/ visited?



As a result...

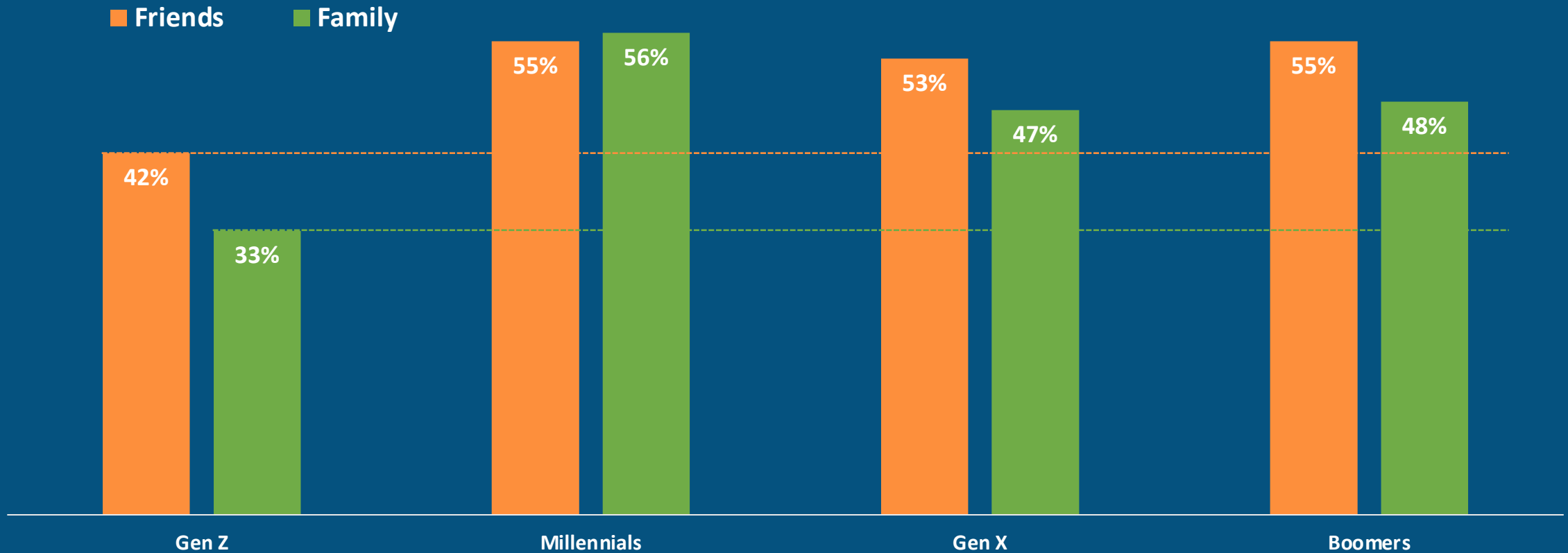
Gen Z – Have you ever done any of the following?



58%
**Have purchased
something based on
influencer
recommendations**



Gen Z is Significantly Less Likely to Rely On...







39%
Experimenting with new foods at home



32%
Experimenting with new foods at home & at restaurants



29%
Experimenting with new foods at restaurants

74%



Look for foods, flavors, ingredients or beverages from a country they recently visited once back home

Purchased a product or visited a restaurant after seeing it on streaming show/ movie

29%

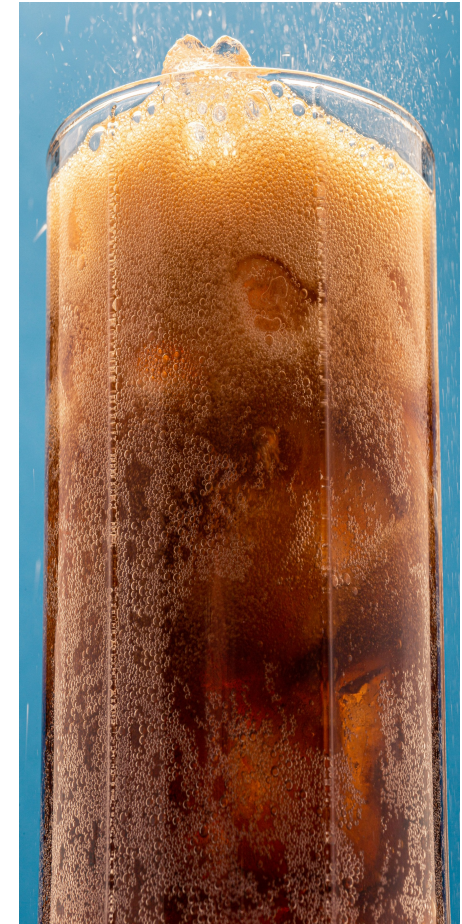


Triggering a Purchase

Gen Z – Think about the last time you made an unplanned food/ beverage purchase. What triggered this impulse buy?



Prioritizing Senses – Gen Z



Ranked 1, 2

65%

55%

41%

24%

15%

Score

3.9

3.4

3.3

2.6

1.8

What Turns Off Gen Z at Restaurants?

57%

of Gen Z are turned off by bad smells

54%

of Gen Z are turned off if things are dirty, unclean, sticky

50%

of Gen Z are turned off if the staff is unfriendly

46%

of Gen Z are turned off if it looks run down or poorly maintained



What Turns Off Gen Z with Food/ Beverage Products?

32%

of Gen Z are turned off by boring description of taste, experience

30%

of Gen Z are turned off by a lack of information on the product's background, story

30%

of Gen Z are turned off if the package feels weird

30%

of Gen Z are turned off by too much packaging, packaging overkill



The “Say/Eat Gap”



Loyalty



**32% of Gen Z
feels like they
constantly have to
watch out because
every brand and
restaurant is trying to
take advantage of
them**



**Algorithms
are a Little
Creepy**

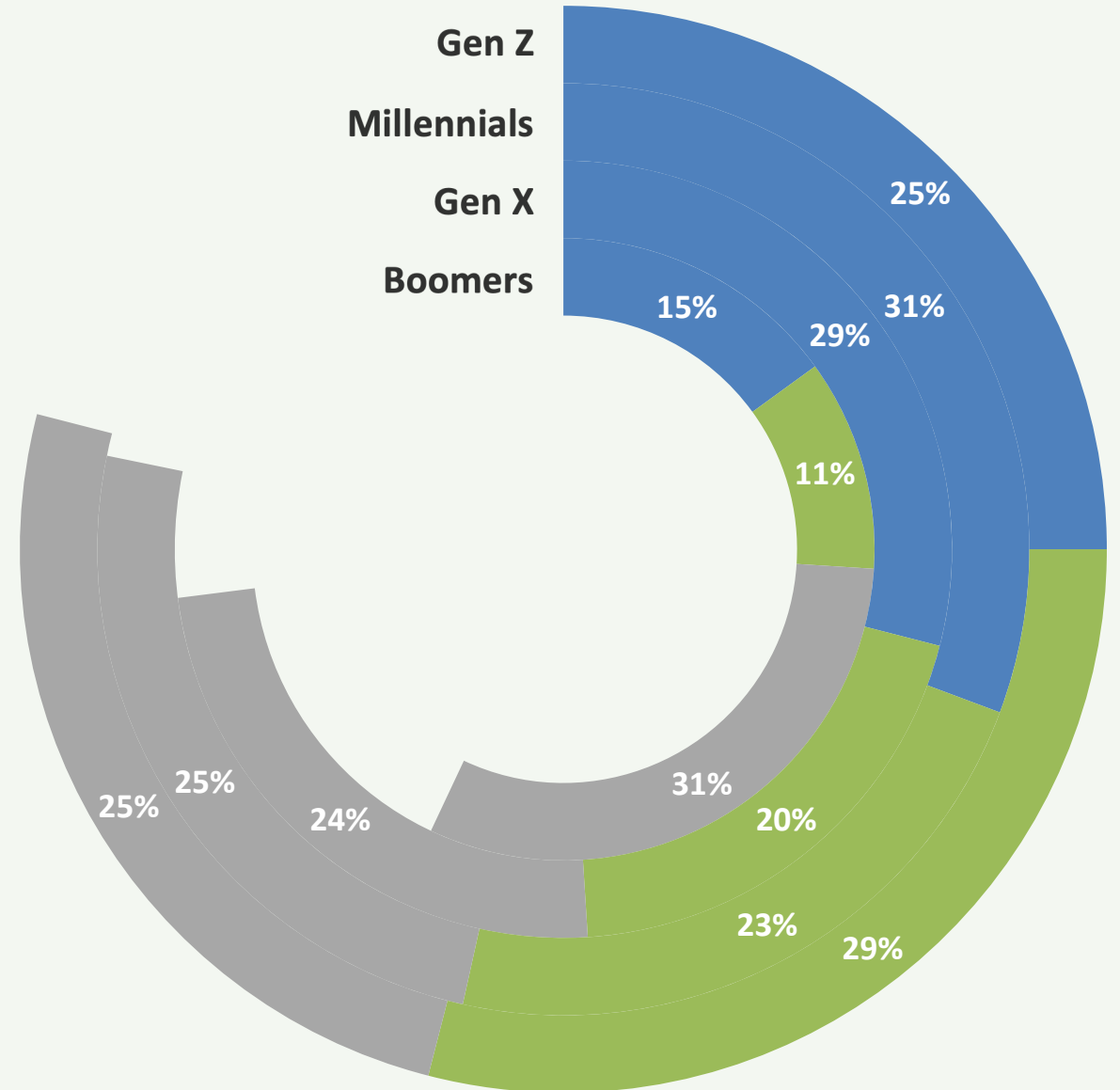
**...but Very
Helpful**



84%

of Gen Z has noticed topics/ ads show up after talking about it near their phone, etc.

- It's great!
- Helps me find, experiment
- Helpful, but a little creepy





50% of Gen Z believes their algorithm knows their tastes better than their parents

Takeaways

The background features a warm, bokeh effect of out-of-focus lights, primarily in shades of orange and yellow. Several glowing light bulbs are visible, some hanging from above and others blurred in the background. The overall atmosphere is cozy and inviting.

THANK YOU

QUESTIONS?

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MENU MATTERS
— *Food Insights That Matter* —