

# Sustainability Trends: Gen Z and C&U



FOODSERVICE PACKAGING  
INSTITUTE®







# DATA SENTIAL

Innovate Quicker. Sell Smarter. Grow Faster.

Industry Insights

Menu & Consumer

Competitive Intelligence

Sales Intelligence

amazon

DUNKIN'

General Mills

HERSHEY'S

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A young man with dark curly hair and glasses is sitting at a wooden table in a cafe. He is wearing a blue, red, and white plaid shirt and has blue headphones around his neck. He is holding a large chocolate chip cookie to his mouth with his right hand and typing on a laptop with his left hand. On the table, there is a white mug of coffee, some papers, and colorful pens. The background is a blurred view of the cafe interior with other tables and plants.

Who is Gen Z?

College Students & Sustainability

C&U Sustainability Initiatives



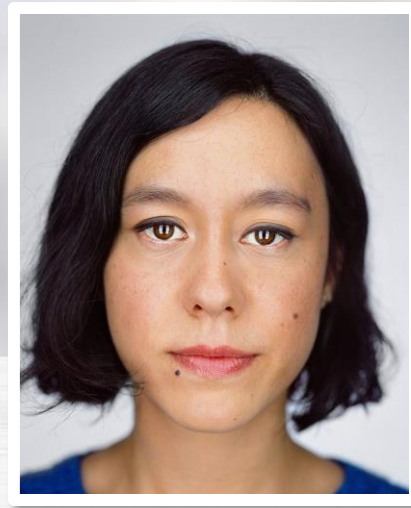
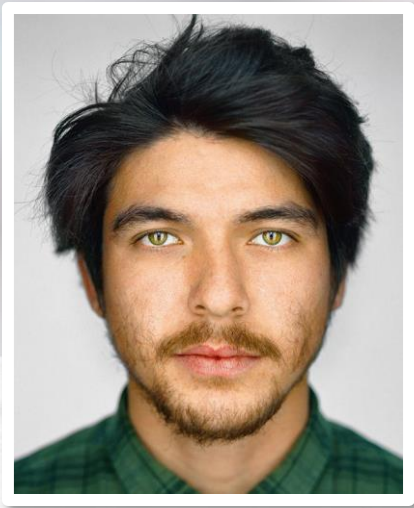


# WHO IS GEN Z?



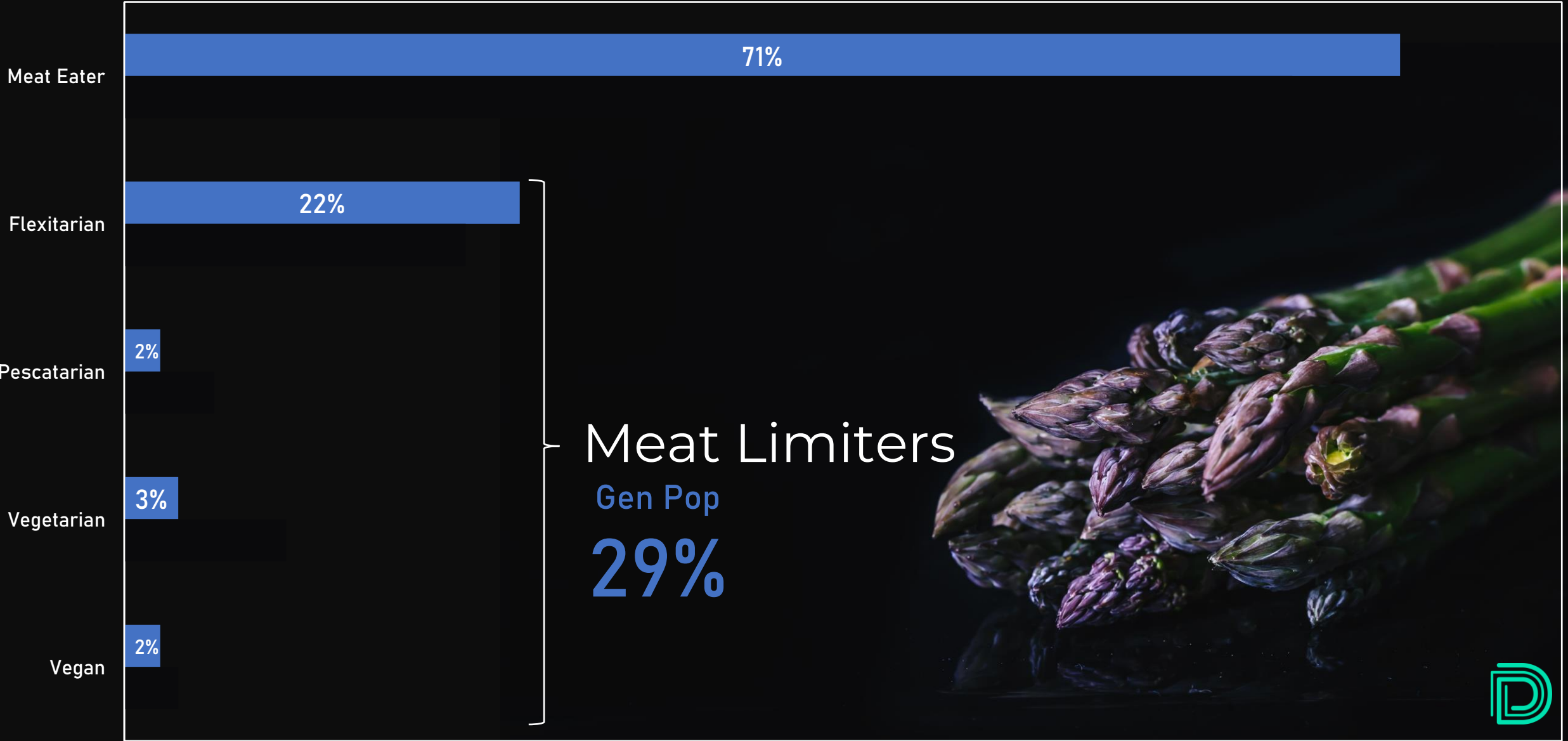


Boomers	Gen X	Millennials	Gen Z
72% white	62% white	56% white	52% white
28% ethnic	38% ethnic	44% ethnic	48% ethnic



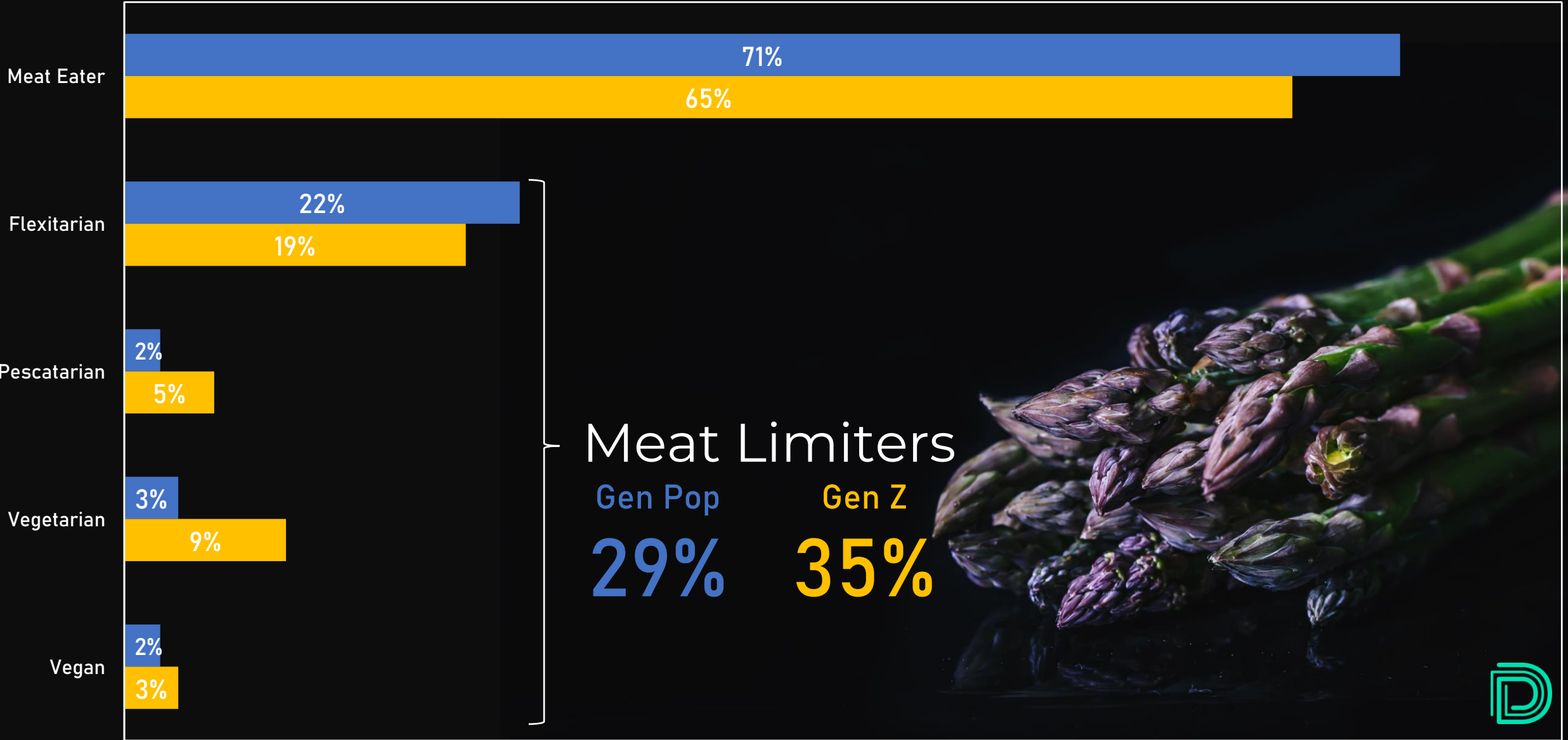


# Eating Approach





# Eating Approach





GEN Z  
is  
**4X**  
more likely to say  
they follow a  
**CLIMATARIAN**  
diet





# 64%

of consumers say that it is  
important to them to make  
sustainable choices that limit  
their impact on the environment

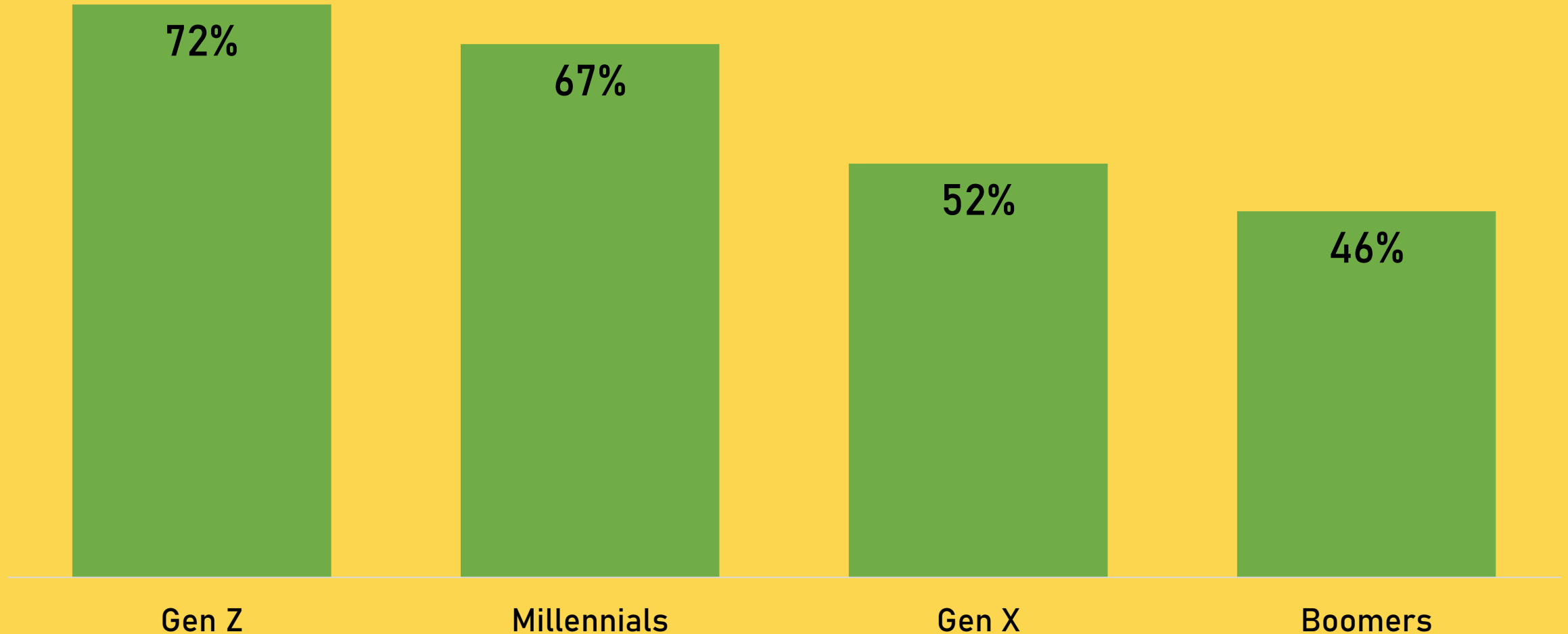


Gen Z	72%
Millennial	67%
Gen X	60%
Boomer+	61%

statistically higher

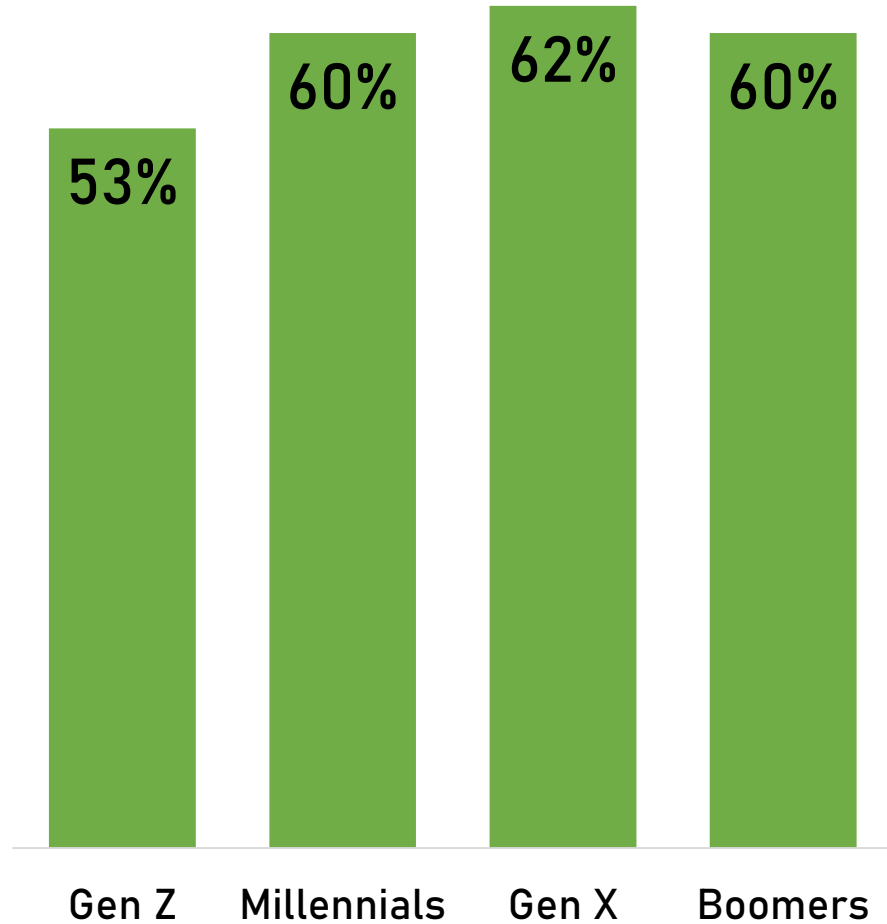
statistically lower

# **...say that sustainability influences food choices when dining away-from-home**

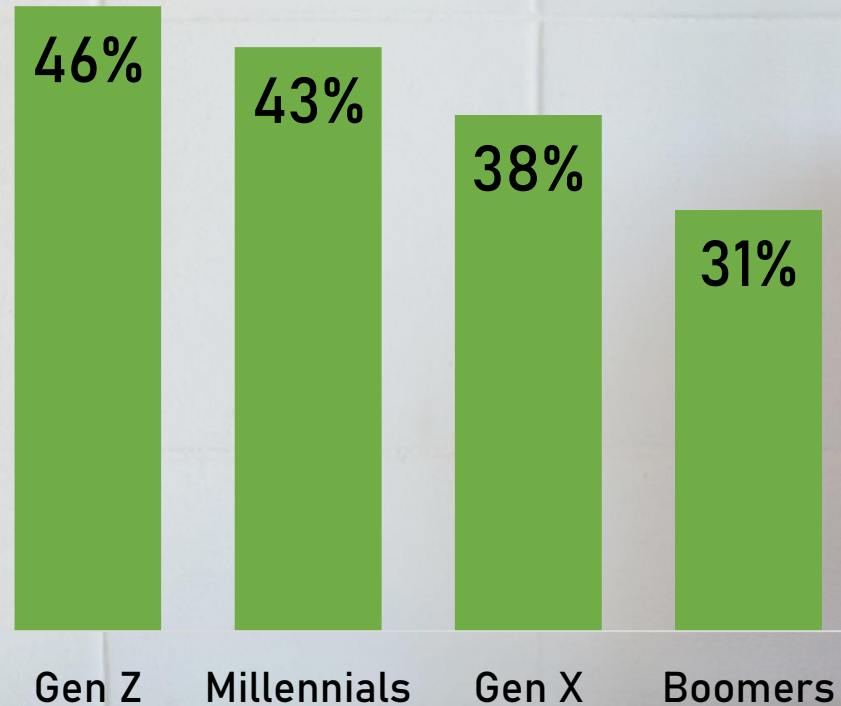




**...would eat something delicious even if  
it were horrible for the environment**



**...consider packaging sustainability very important when ordering takeout or delivery**





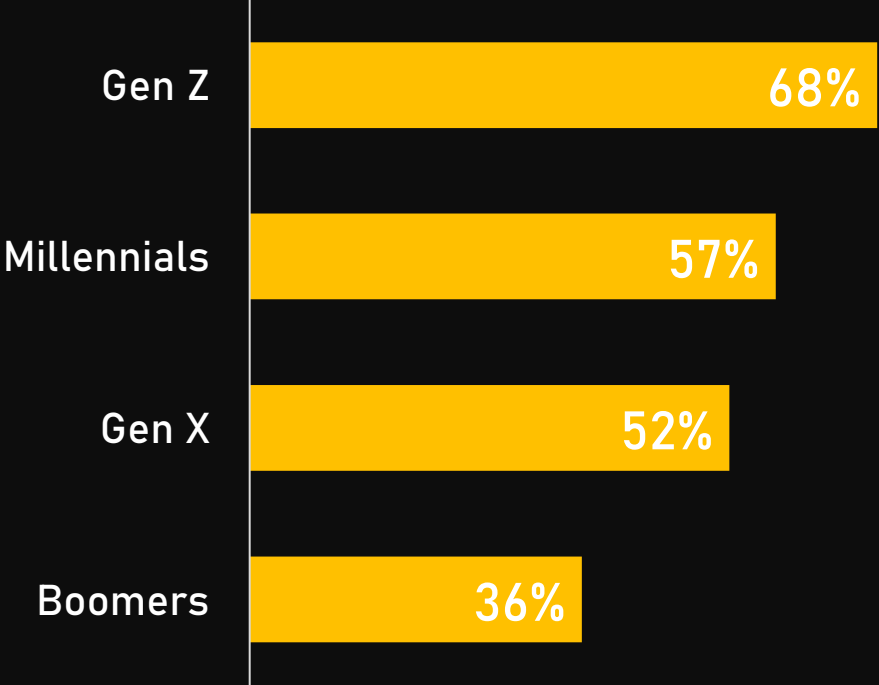


# 77%

of Gen Z consumers would sacrifice  
functionality for more environmentally-  
friendly food packaging



**...bought a food or beverage product because the packaging looked aesthetically pleasing**



2021 FPI & QSR magazine “Package of the Year”

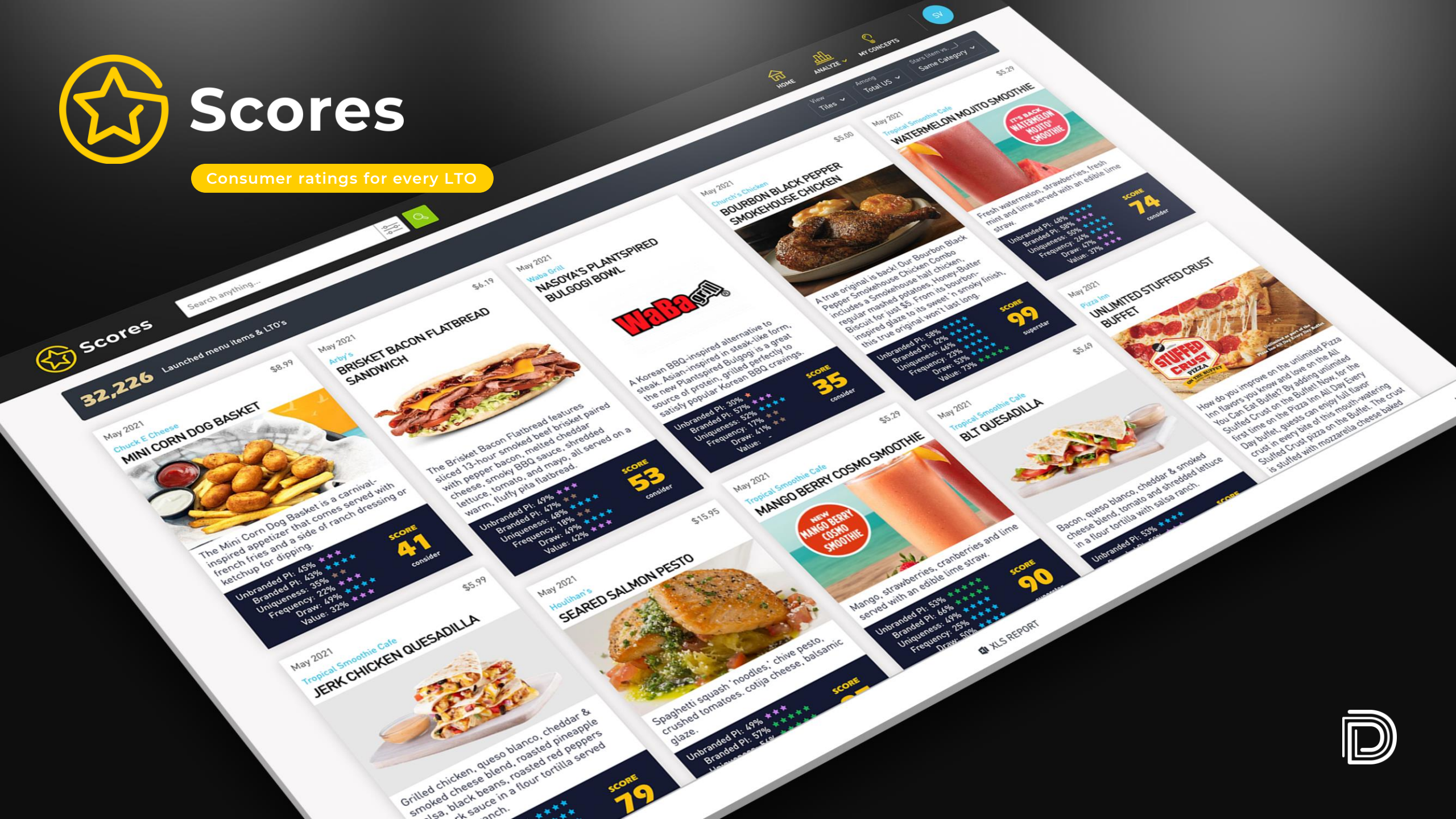






# Scores

Consumer ratings for every LTO





# Young Consumers & Plant Based

average purchase intent

Total US

40%

Gen Z

47%



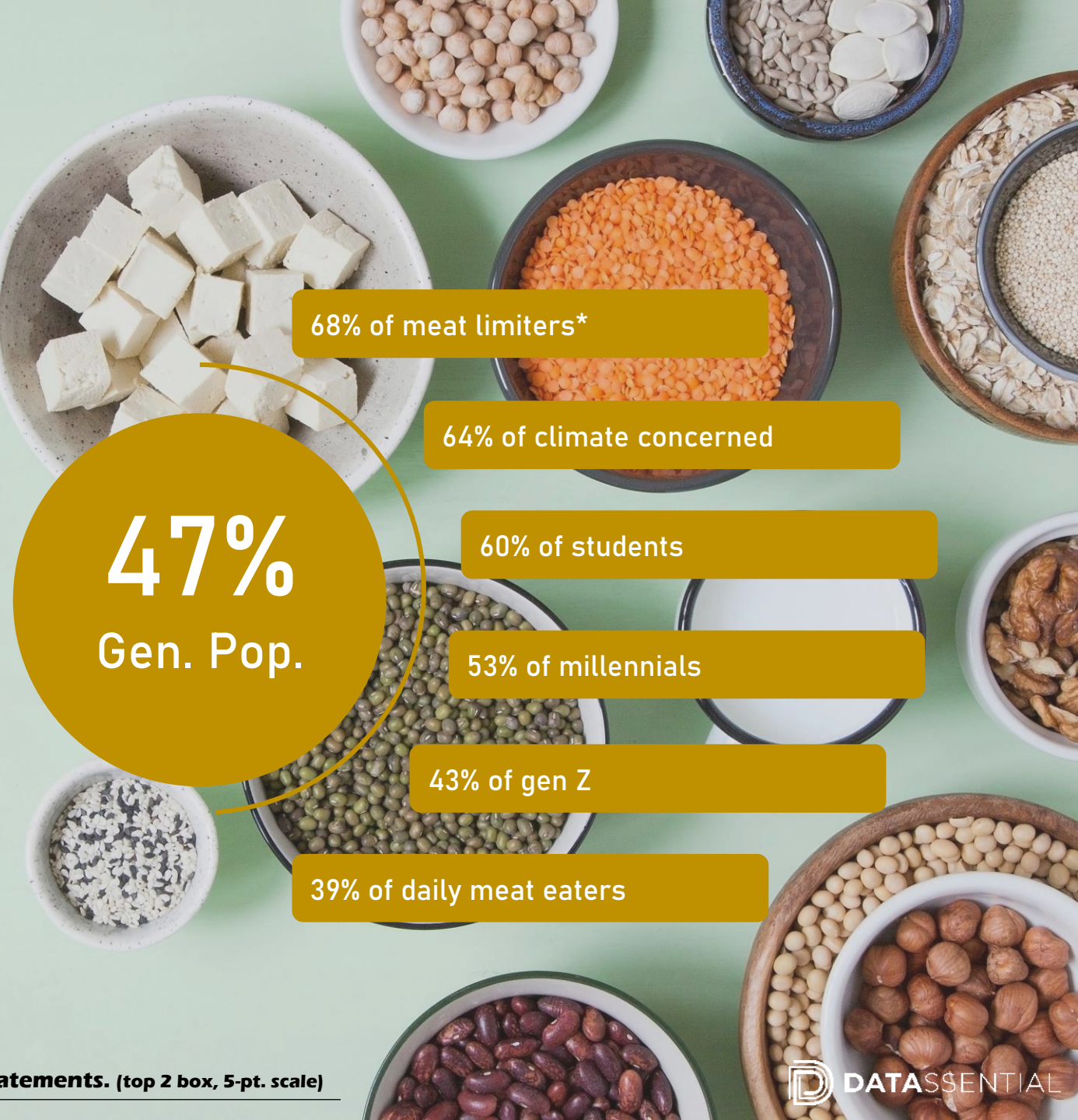


# And almost half of consumers believe that plant-based protein is more sustainable.

This number is greater among limiters\*, climate concerned consumers, students, and Millennials. Fewer Gen Z and daily meat eaters believe this to be true.

“Plant-based protein is a more sustainable source of protein than animal-based protein”

\* vegan, vegetarian, pescatarian, and flexitarian consumers




Please tell us your level of agreement with each of the following statements. (top 2 box, 5-pt. scale)

# Gen Z vs. Total US

Feb 2023 \$8.99

Smashburger

**CLASSIC SMASH PLANT-BASED BURGER**



Jack and Annie's jackfruit burger  
American cheese lettuce tomatoes red onions pickles Smash Sauce ketchup toasted bun.

Unbranded PI: 38%	★
Branded PI: 43%	★
Uniqueness: 40%	★★★
Frequency: 18%	★★
Draw: 46%	★★
Value: 37%	★★★


**SCORE**  
**18**  
low potential

**TOTAL US**

Feb 2023 \$8.99

Smashburger

**CLASSIC SMASH PLANT-BASED BURGER**



Jack and Annie's jackfruit burger  
American cheese lettuce tomatoes red onions pickles Smash Sauce ketchup toasted bun.

Unbranded PI: 57%	★★★
Branded PI: 68%	★★★★★
Uniqueness: 62%	★★★★★
Frequency: 19%	★★★
Draw: 58%	★★★★
Value: 60%	★★★★

**SCORE**  
**88**  
superstar

**GEN Z**




# Gen Z vs. Total US

Aug 2022 \$6.99

Pollo Tropical

VEGAN CHICKEN PICADILLO  
TROPICHOP



Our delicious Vegan Chicken Picadillo TropiChop® will exceed your expectations with its incredibly tasty flavor. Our Vegan Chicken Picadillo is made with 100% plantbased ground chicken meat prepared with peppers and onions in a savory tomatobased sauce and served over your choice of base.

Unbranded PI: 34%	★
Branded PI: 55%	★★
Uniqueness: 54%	★★★★
Frequency: 21%	★★★
Draw: 48%	★★★
Value: 43%	★★★★


**SCORE**  
**49**  
specialty appeal

TOTAL US

Aug 2022 \$6.99

Pollo Tropical

VEGAN CHICKEN PICADILLO  
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Our delicious Vegan Chicken Picadillo TropiChop® will exceed your expectations with its incredibly tasty flavor. Our Vegan Chicken Picadillo is made with 100% plantbased ground chicken meat prepared with peppers and onions in a savory tomatobased sauce and served over your choice of base.

Unbranded PI: 51%	★★★
Branded PI: 73%	★★★★★
Uniqueness: 49%	★★★★
Frequency: 24%	★★★★
Draw: 52%	★★★★
Value: 51%	★★★★

**SCORE**  
**84**  
consider

GEN Z


# Gen Z vs. Total US

Jun 2022


\$7.00

Peet's Coffee & Tea

BROWN SUGAR COLD BREW OAT LATTE WITH JELLY




The familiar sweetness of Brown Sugar with a layer of creamy oat milk and a float of our signature bold, juicy Baridi Cold Brew. Served with our new Brown Sugar Jelly, all over ice for a fun and dynamic experience.


Unbranded PI: 40% 

Branded PI: 50% 

Uniqueness: 61% 

Frequency: 21% 

Draw: 56% 

Value: 31% 

SCORE

61

specialty appeal


TOTAL US

Jun 2022


\$7.00


Peet's Coffee & Tea


BROWN SUGAR COLD BREW OAT LATTE WITH JELLY





The familiar sweetness of Brown Sugar with a layer of creamy oat milk and a float of our signature bold, juicy Baridi Cold Brew. Served with our new Brown Sugar Jelly, all over ice for a fun and dynamic experience.


Unbranded PI: 60% 

Branded PI: 75% 

Uniqueness: 80% 

Frequency: 30% 

Draw: 67% 

Value: 45% 

SCORE

99

superstar

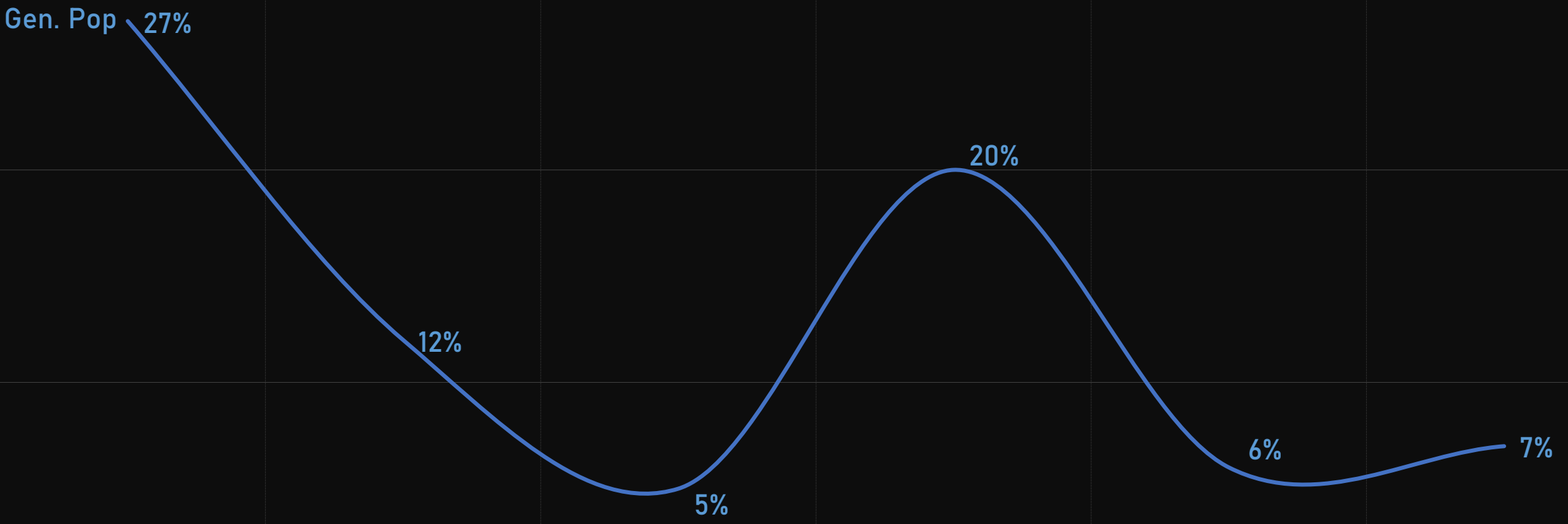
GEN Z



# COLLEGE STUDENTS & SUSTAINABILITY

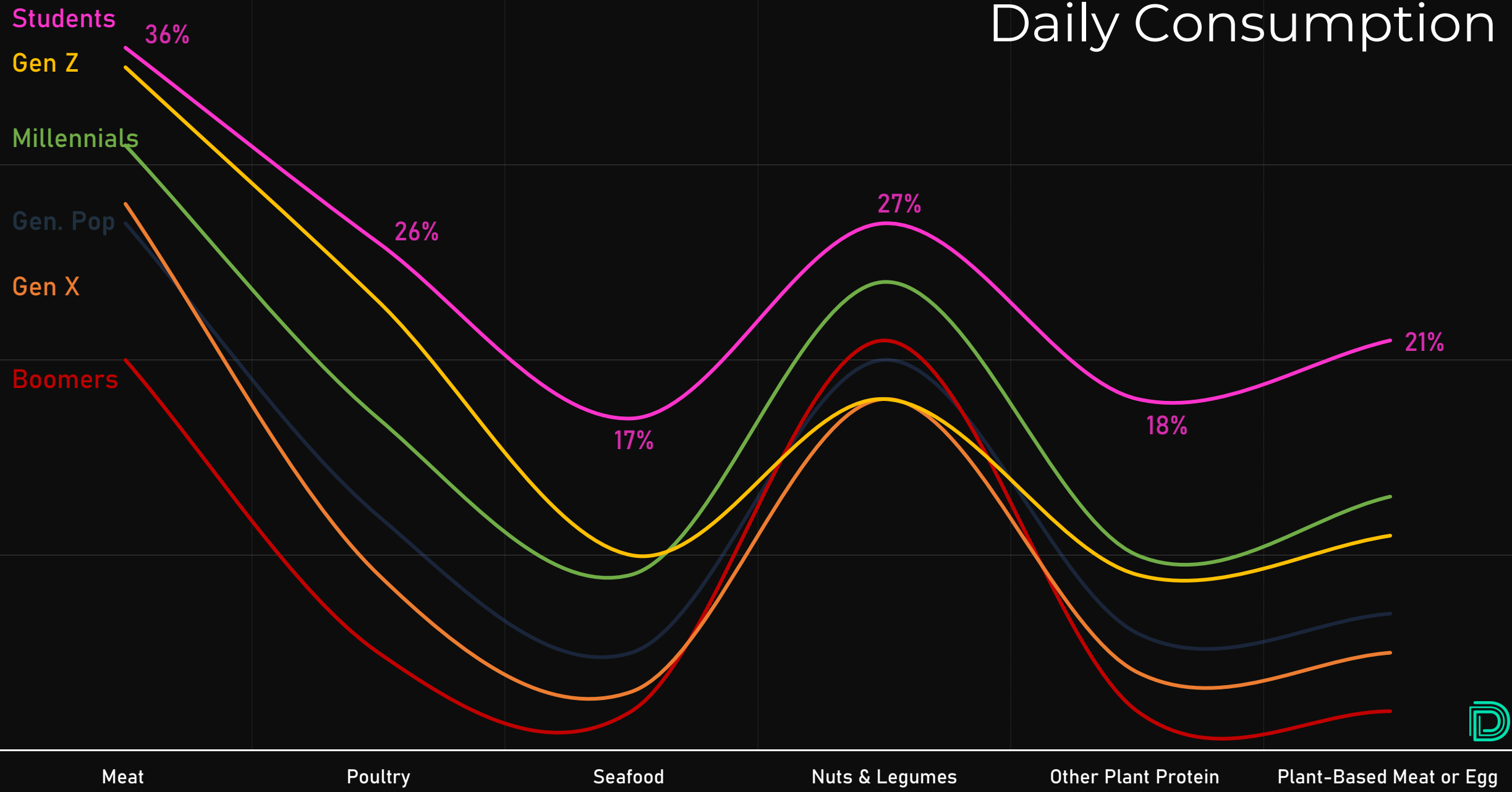


# Daily Consumption





# Daily Consumption



**When prepared well, plant-based protein  
tastes just as good as animal-based protein**

**55%**

of college students agree  
(vs. 40% of gen. pop. consumers)







# Plant-based dairy tastes just as good as animal-based dairy

## 55%

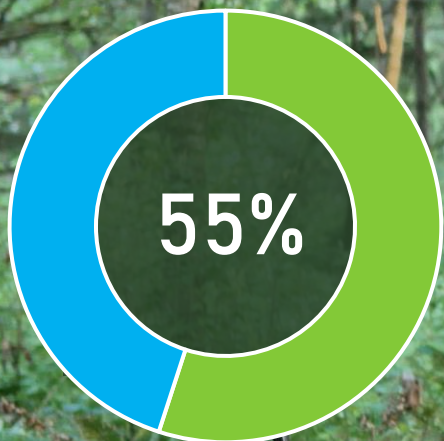
of college students agree  
(vs. 33% of gen. pop. consumers)

## 52%

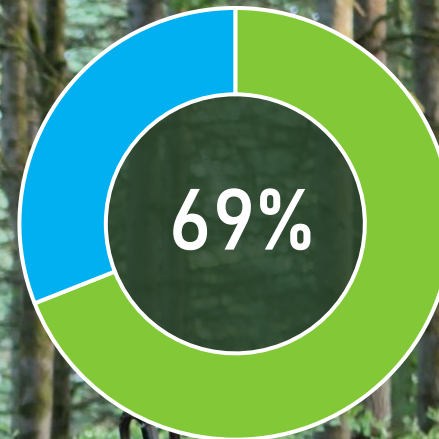
of college students  
prefer plant-based  
dairy to animal-  
based dairy



# Who considers climate change important?



GEN. POP. CONSUMERS



COLLEGE STUDENTS



# A staggeringly high percentage of consumers associate packaging with environmental impact.

For those concerned about the environment, this is nearly 9 in 10 consumers. Boomers share this association more than average, and more than Gen Z.

“The type of material used to package food has an impact on the environment”

77%  
Gen. Pop.

88% of climate concerned

84% of high-income HHs (\$100K+)

83% of students

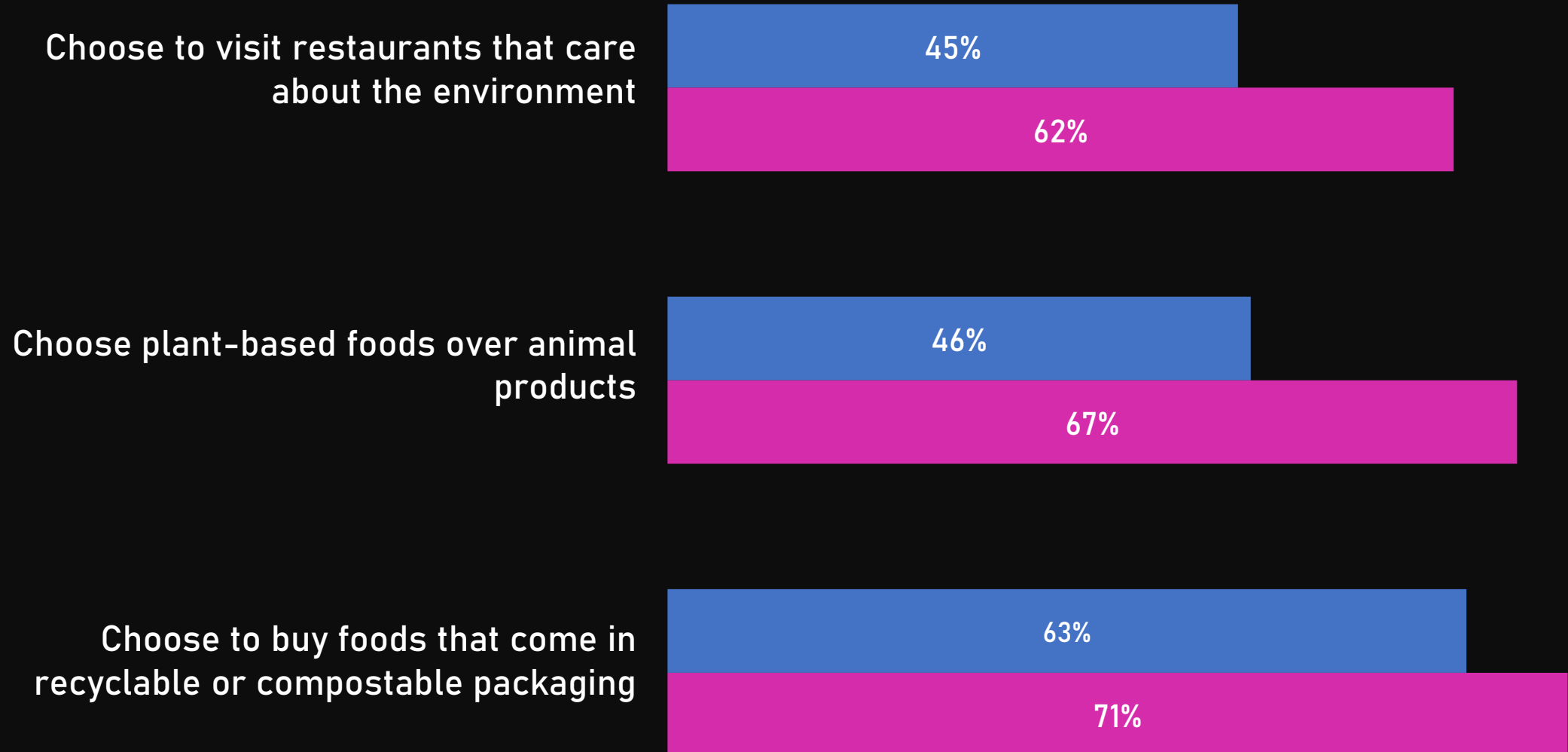
82% of meat limiters\*

82% of boomers

\* vegan, vegetarian, pescatarian, and flexitarian consumers

Please tell us your level of agreement with each of the following statements about food and the environment. (top 2 box, 5-pt. scale)

# Environmental Behaviors: Gen Pop. Vs. College Students





# C&U Sustainability Initiatives





**on campus menus**



# Sustainable callouts on the menu...

	C&U	Restaurants	C&U Index (vs. Rest.)
Vegan	85.5%	23.4%	366
Vegetarian	85.5%	42.0%	204
Plant Based	27.7%	6.0%	464
Locally	6.9%	15.4%	45
Organic	3.1%	21.6%	15
Sustainable	2.5%	2.1%	122

# Plant-based meat on the menu...



	C&U	Restaurants	C&U Index (vs. Rest.)
Veggie Burger	65.4%	11.8%	556
Plant Based Chicken	38.4%	1.8%	2095
Plant Based Sausage	28.3%	2.1%	1348
Plant Based Burger	13.2%	7.0%	190
Plant Based Meatball	8.2%	0.6%	1282
Plant Based Crumbles	4.4%	0.3%	1529



C&U	Item	Description
Arizona State University West Campus	Black Bean Burger	black bean burger, american cheese, lettuce, tomato, pickle, caramelized onion, burger sauce. vegetarian.plant forward.
Creighton University	Zucchini And Black Bean Patty	vegetarian. vegan. mindful. plant based.
Florida State University	Greek Black Bean Burger	vegan black bean burger topped with lettuce, tomato, cucumber, red onion, and tzatziki sauce on a whole grain bun. healthy plants are at the center of the plate. vegan.
Grand View University	Pineapple Chipotle Black Bean Burger	vegan black bean burger topped with pineapple salsa, lettuce, tomato and chipotle mayonnaise on a whole grain bun. vegan.
Stephen F. Austin State University	Gardenburger Black Bean Veggie Burger	hearty black bean burger made with brown rice, onions, corn, red bell peppers, chilies and a hint of garlic on a white roll. vegan.
The University Of New Mexico	California Vegetable Burger .	juicy vegetable burger topped with avocado and sundried tomato aioli. vegetarian. 1 sandwich.
University Of California-Davis	Beyond Meat Burger	plant-based beyond meat sliders with vegan mayonnaise, lettuce, tomato, and onion. vegan and halal.
University Of California-Los Angeles	Impossible Cheeseburger	a grilled impossible meat blended patty, served on a whole grain bun with sliced fresh tomato and green-leaf lettuce. prepared with alcohol. vegetarian.



## Plant-based dairy on the menu...

	C&U	Restaurants	C&U Index (vs. Rest.)
Soy Milk	12.6%	2.4%	532
Almond Milk	9.4%	4.5%	211
Coconut Milk	8.8%	8.1%	109
Oat Milk	1.3%	2.5%	50





C&U	Item	Description
Arizona State University West Campus	Vegan Old-Fashioned Mashed Potatoes	fresh mashed russet potatoes with soy milk, vegan margarine, salt and pepper.
Central Washington University	Gracious Grain Oatmeal Bowl	with soy milk vegan, contains soy and nuts, with whole milk vegetarian, contains milk and nuts, steel cut oats, apple, cinnamon, chia seeds, cashews, raisings.
Fordham University	Spiced Breakfast Quinoa	hearty quinoa simmered in a mixture of apple juice, soy milk and cinnamon. vegan
Louisiana State University And Agricultural & Mechanical College	Tamale Pie With Vegan Mayo	tamale pie topped with an vegan mayo and soy milk cornbread. 6 ounce. vegan
North Carolina Central University	Spiced Breakfast Quinoa	hearty quinoa simmered in a mixture of apple juice, soy milk and cinnamon. vegan.
University Of California-Irvine	Soy Milk French Toast	Texas toast dipped in cinnamon soy milk mixture topped with apple compote
University Of Memphis	Roasted Corn Chowder Soup	corn, potatoes, shallots, red peppers, Italian parsley, and soy milk. vegan and vegetarian





# across campus

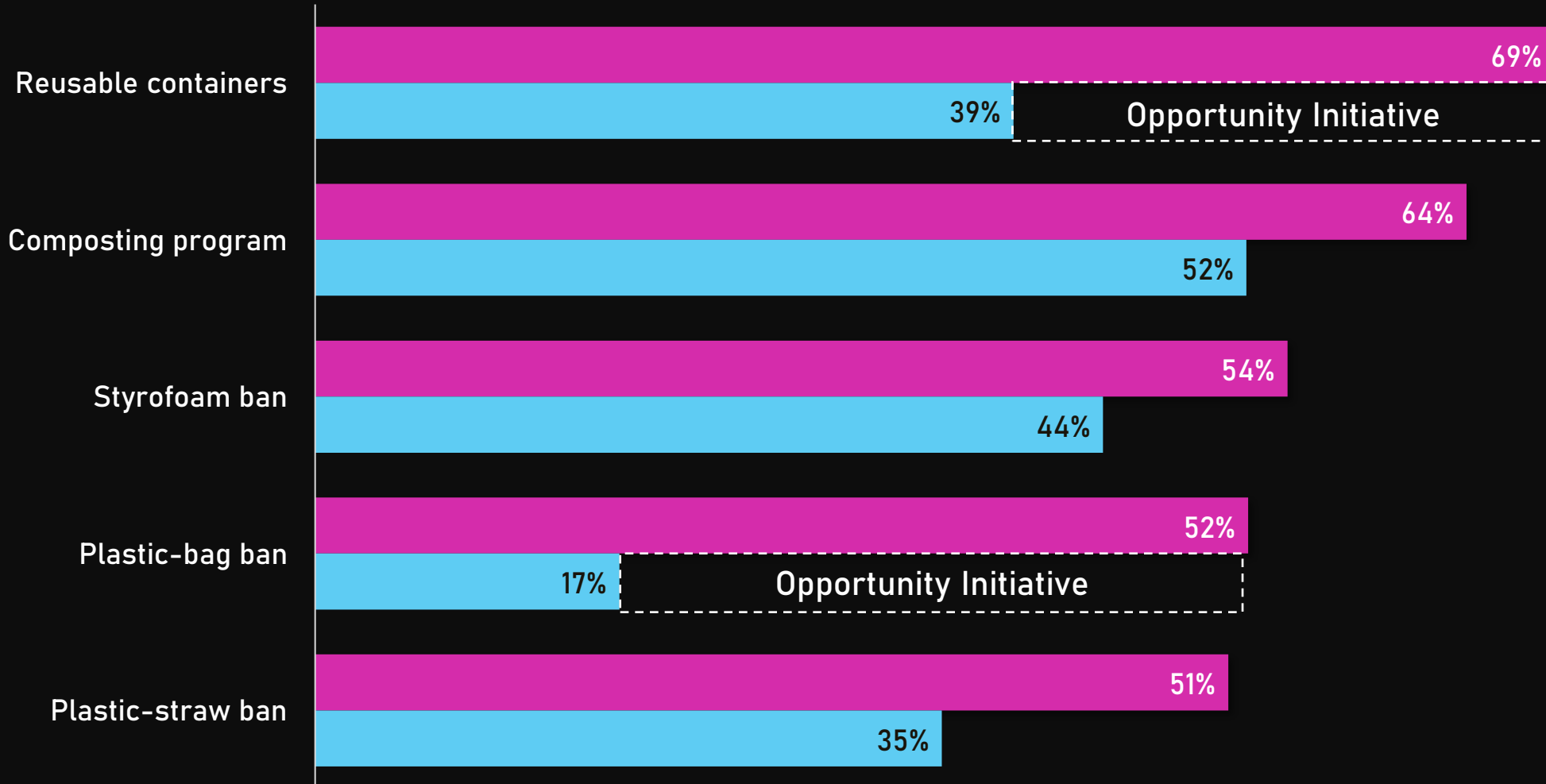




# Students are interested in...



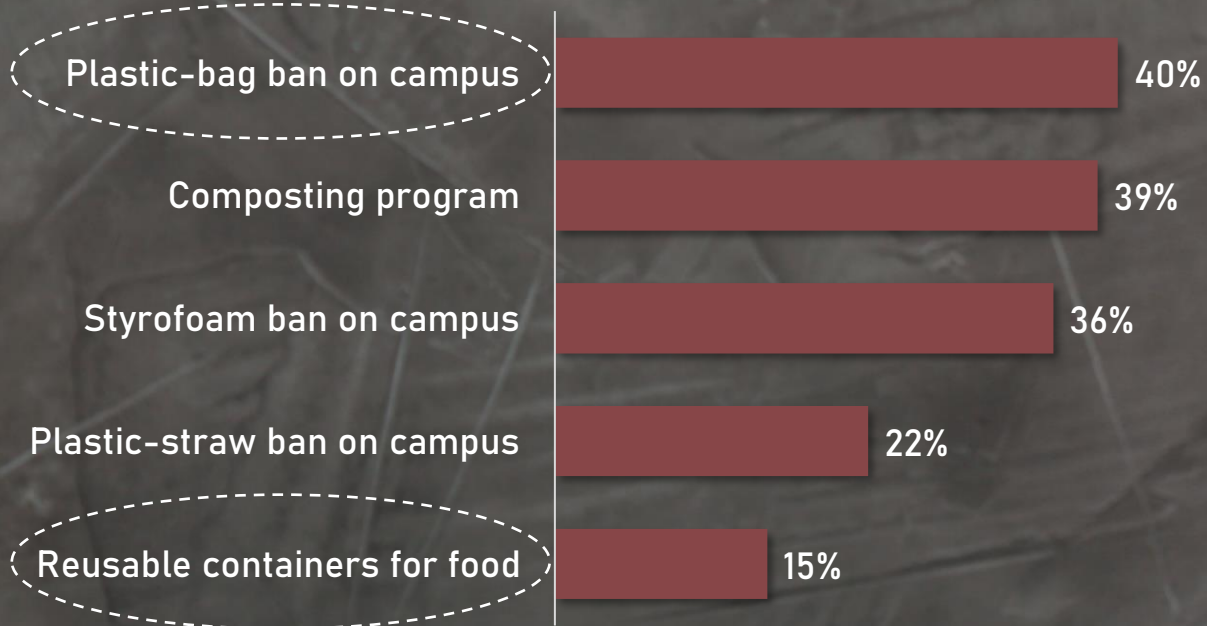
# Campuses offer...





# C&U Operator Interest

(among those who don't offer)



Opportunity Initiatives for C&U



## Purchase

Customers may purchase a green Reusable To-Go Container from any checker stand in our residential Dining Courts (The District on West Green and Nelson Court). Containers have a one-time cost of \$5 and can be used throughout your career at Ohio University. You are not required to hold a meal plan to buy into the program, and this payment may be made using Flex Points, Bobcat Cash, Visa, MasterCard, American Express or Discover.



## Fill

Once inside the Dining Court with your Reusable To-Go Container, you have ten minutes to fill your container with a variety of food options. You are not permitted to eat a meal in the dining court and remove food in a to go container. Please make sure your container is properly closed before taking your meal with you to your next destination. When choosing to take your meal to-go, you will have the option to take a napkin, plastic utensils and a compostable cup with a lid. Please adhere to the [FDA's food safety instructions](#) if you choose to store your meal before consumption.

## Remove and Return

There's no need to wash your container! Simply remove large food debris before returning your container at one of our designated drop-off locations: all residential Dining Courts, Boyd Market, Nelson Market or West 82. Customers who return containers at Boyd Market, Nelson Market or West 82 will receive a key tag which can be redeemed for a clean container at any residential Dining Court. Those who return containers at any residential Dining Court may choose to receive either a key tag or a clean container to be used immediately.



# Northwestern

## BOZZIS ARE GOING GREEN



### HOW DOES IT WORK?

### University of New Haven



- Students purchase container from Sodexo cashier at Westside Hall's Food on Demand (FoD) for \$5 (refundable deposit)
- Student uses container
- Student returns container to cashier, and receives a new container
- Containers are collected in wheeling tote before being sanitized in a dishwasher



# key takeaways

- Sustainability is more important to Gen Z, but so are aesthetics.
- Plant-based eating is more common, and more appealing, for Gen Z and college students.
- Campus dining's approach to plant-based offerings is different than that of restaurants.
- Plastic bag bans and reusable container programs are opportunity initiatives for C&U operators, though ease of implementation could be a barrier for the latter.



**Download More information  
from our Sustainability Report**



**<http://datassential.com/fpi>**

# Thank You



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