

WHAT'S EATING GEN Z?

**An exploration of university
student eating and drinking
habits on campus**

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A report commissioned by Green Cuisine and TUCO





Forewords



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There's been a seismic dietary shift in recent years, with plant-based and sustainable foods surging in popularity. This has changed the face of our industry, while helping to accelerate its race towards net zero, or even carbon negative.

Socially aware and a high proportion of these conscious consumers, Green Cuisine wanted to learn how students' diets have changed as a result. To understand how environmental awareness, new technology and lifestyle changes are affecting their dining habits. And to understand how these and the cost-of-living crisis is influencing their food choices when dining on campus.

To find out more, we commissioned research with 1,000 university students from across the UK about their eating and drinking habits, and what influences these. The results are in this report, along with actionable tips and recipes aimed at helping university caterers meet the dietary and budgetary needs of these price-sensitive yet demanding diners.



Mike Haslin
CEO of The University Caterers
Organisation (TUCO)

Already a budget-conscious group of diners, the cost-of-living crisis has made life increasingly tough for students. And in the face of spiralling food and energy costs, the job of the university caterer has become ever more challenging.

TUCO researched student eating and drinking habits back in 2014 and 2018, so we were keen to learn how the landscape has changed. Our last report revealed health and convenience as the top drivers for students' food choices. Little has changed. However, environmental concerns are having a stronger impact, judging by the rise in meat reduction diets and the number of students doing this for reasons other than cost.

This research reveals several more interesting dynamics around snacking, cuisines, and their choice of High Street operators. Fortunately, these and trends in technology can offer valuable pointers for university caterers. We've provided several in this report, to help them adapt their offering and encourage more students to dine on campus.

Student snapshot: Understanding the typical student profile

Student foodie personalities

Flexitarianism has transformed from trend to movement and industry figures show younger generations are most likely to be reducing meat consumption, with 55% of those surveyed choosing to eat plant-based, vegan and/or vegetarian food, with 31% identifying as either plant-based, flexitarian, vegan or vegetarian (Plant-based 6.2%, Flexitarian 8.3%, Vegan 5.9%, Vegetarian 10.6%).

“Plant based and vegan dishes have moved on. Previously seen as ‘second best’, they were mainly eaten by vegetarians. Now, they’re featured on menus and are much more creative and appetising, so meat eaters want a piece of the action too!”

Holly

31%
describe their ‘foodie personality’ as either plant-based, flexitarian, vegan or vegetarian

55%
Over half, or the majority of those surveyed (55%) choose to eat plant-based/vegan and / or vegetarian food

44% of students described themselves as ‘snackers’

“To satisfy students on the go, likely to be seeking something fast, operators could provide smaller versions of indulgent-looking yet nutritious snacks and light bites, which keep them full, all the while being budget friendly. Protein/Energy Balls which incorporate chocolate/cocoa are perfect for giving them the feeling they’ve had something indulgent, but also fuelling them through the day.”

Mike

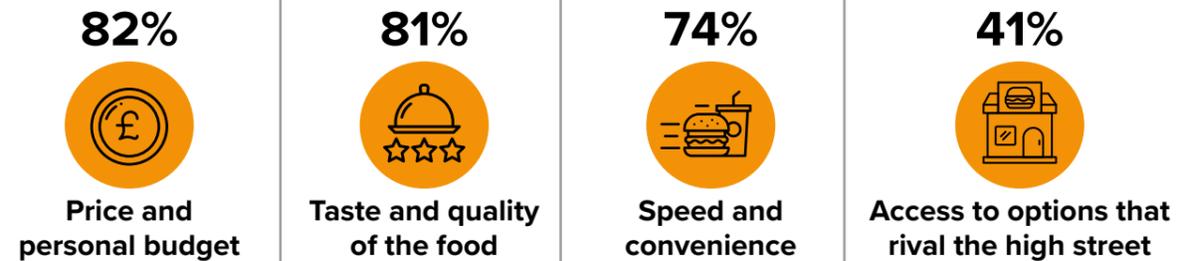
Behind the tray: An overview of student eating and drinking on campus

University caterers are doing well tempting students to dine on campus, judging by the number of students doing this once a week or more. But there also appears to be potential to attract even more to campus establishments and increase the frequency at which they dine.

Nearly 7 in 10 (69%) eat meals on campus at least once a week, with nearly a third (28%) eating on campus most days

The top 4 factors influencing choice

Q: ‘What factors do you consider when buying a meal or snack from the canteen on campus?’



Price will always be critical for students, and with costs increasing for university caterers, this could need a rethink. Different portion sizes could be a way of addressing this. Or offering scalable meals that elevate options from budget to premium.

Four in 10 students said they could be tempted by campus options that match the High Street, showing the value in keeping up with trending food and formats.

Over 51% cook a meal from scratch on most days

“Meal kits have risen in popularity and could be a good opportunity to cater for students cooking meals from scratch. Inspiration and guidance for less experienced cooks, they can also satisfy the 1 in 4 treat seekers wanting something that replicates an OOH meal.”

Mike



40% said they never or hardly ever drink alcohol (Never drink alcohol 24%, Hardly ever drink alcohol 16%). But, 34% said they drink alcohol at least once a week.

“Alcohol has traditionally been seen as a key part of university life. But this is changing. Before, our research revealed 11% of students drank alcohol rarely or never¹ – this figure has almost quadrupled. A greater focus on wellness and mental health, stretched budgets, diverse student populations, and awareness events like ‘Dry January’ could all explain why more students are abstaining.”

Mike

¹ Student Eating & Drinking Habits Report, TUCO, 2018



Tightening belts, changing plates: The financial climate and its impact on university students

The economy has put extra pressure on students' already tight budgets. In addition, inflation has driven up operator costs. Finding a sweet spot where campus food meets squeezed student budgets and remains profitable is key.

Student tactics to reduce on-campus food costs

Q 'What do you do to keep costs down when buying food on campus?'

50%
Only buy food OOH when they really need to

40%
Look for price promotions

26%
Skip meals to keep the cost of food down

19%
Use budgeting tools and other resources

6%
Don't worry about keeping costs down

Concerning numbers of students are skipping meals to keep food costs down. This could be swapping out meals for snacks, or not eating on campus at all. This makes the case for filling healthy snacks and light bites even more important, giving them enough nutrients to get through the day whilst satisfying squeezed wallets.

Although most students are trying to keep costs down when buying food on campus, 1 in 20 say they are not sensitive to price. Options to premiumise meals could help caterers satisfy this small segment of lucrative customers as well as those seeking a treat.

"Personalisation is a growing trend on the High Street, particularly in the booming food-to-go sector - think wraps, buddha bowls, or burrito bowls. Good value core ingredients meet the needs of students on a budget, while extras offer greater personalisation, so they can upgrade as preferred. Catering for the less price sensitive with indulgent touches like truffle oil and parmesan on fries means students won't miss out on their need for a treat!"

"This works well for different diets too – catering for, and reassuring, students with allergies, vegan, plant-based or Halal diets."

Andy Daniels, Culinary Lead for Green Cuisine

From trends to tastes: Factors shaping student food preferences

University is the first time most students can make all their own food choices, so they tend to be based on familiarity, or what they'd eat at home. Alongside, survey results revealed the impact of external influences: from high street trends to social media influencers, to greater awareness of food's health and sustainability credentials.

Top factors influencing food choices

Q 'To what extent do the following influence your food choices on campus?'



"Street food and food vans are now a common sight in cities across the UK. These and a dizzying array of food-to-go options and meal deals have changed consumer expectations and the foodservice landscape."
Holly

Media has played a strong role in recent years, raising awareness of planetary concerns and food's environmental impact. This could explain why, when asked why they eat plant-based or vegetarian food, 4 in 10 students cited environmental causes.

Top reasons for choosing a plant-based diet

Q 'Why do you choose to eat plant-based and/or vegetarian food?'



Reinforcing the power of the influencer, over a third of respondents said their food choices on campus are influenced in some way by social media influencers and celebrities.

38% said their food choices on campus are influenced in some way by social media influencers and celebrities

"When asked about the biggest barriers to buying plant-based and vegetarian foods, 31% of students said there is too much emphasis on what is missing, rather than what they deliver in terms of taste. The World Resources Institute's Playbook is packed with tips that help operators nudge diners towards sustainable, plant-rich options, with tactics ranging from menu placement to dish descriptions."
Holly



Savouring the high street: Examining the influence of high street trends on student consumption choices

When asked what influenced their choices, 45% of students wanted options rivalling the High Street. Speed and convenience are also important deciding factors, impacting how and why they buy food. With top QSRs offering both of these things its no surprise to see the brands that topped the favourites list.

Top 5 High Street brands students would like replicated on campus:



Almost half (45%) of students were interested in replicas of high street restaurant brands. Each of their top brands employ a food concept and satisfy a range of diets at different price points. Providing meals 'your way', they meet growing needs for personalisation, in particular Nandos and Subway. Promotions and loyalty schemes have also become prevalent as the cost-of-living has risen.

"Limited time offers (LTOs) are becoming a popular way for QSRs to drive footfall and create buzz across social. This could be a good tactic to replicate on campus, creating and promoting trend-led dishes, which are available for a short time. Connecting with brands could also help with promotional costs."
Mike

The world on a plate: Navigating global cuisine flavour and format influences

Its clear students look for a variety of cuisines from across the world when it eating out. Timeworn favourites, the top five cuisines students favour, all have plenty of flexible formats that make meat dishes easily adaptable to be plant-based.

Mexican makes the top five, suggesting the macro trend continues to maintain its popularity. Perhaps this is because of the vast range of dishes it offers, but maybe also because of its adaptability to different diets and budgets.

The most popular formats sit firmly within the realms of 'food-to-go' reflecting industry trends as well as student needs for taste, price and convenience.

Top 5 cuisine choices

Q: 'What sorts of cuisine choices would you prefer to see on campus?'



Top 5 food formats

Q: 'What are your favourite types of dishes to buy on campus?'



Top 3 most important nutritional attributes for dishes on campus:



"Protein features highly as a feature driving dish choice. With busy schedules and stretched budgets, students are keen to make every meal count, sustaining themselves until their next meal. For the snackers, this feature will be just as important, fuelling up between pit-stops."

"Healthy meals are a priority too, with low calorie and vegetarian options following protein in terms of importance. To address this, operators could consider healthy high protein low carb options, for example including courgetti, lettuce wraps, or cauliflower rice."
Andy Daniels, Culinary Lead for Green Cuisine





Fish-less Finger Soft Tacos with Pineapple Salsa

A delicious student-friendly version of a fish taco, bound to be a hit on campus.

Serves: 4

Ingredients:

- 12 Green Cuisine Fish-less Fingers (1.5 per taco)
- 8 mini tortillas/wraps (30g each)
- 2 little gem lettuce, shredded
- 140g tinned pineapple, finely diced
- 1/2 red pepper (50g), finely diced
- 1 bunch coriander (25g), finely chopped
- 1/2 red onion(50g), finely diced
- 1 pinch onion salt (0.36g)
- 1 pinch black pepper (0.36g)
- 60ml soured cream
- 1/2 lime (zest and juice – 15ml)

Instructions:

1. Cook the fish-less fingers as per the pack instructions
2. Mix the pineapple, red pepper, red onion and coriander (leaving a little to one side to garnish) with a pinch of onion salt and pepper to create the salsa
3. Mix the soured cream with the lime juice and zest
4. When the fish-less fingers are ready, cut each in half
5. Lightly toast the tortillas in a dry pan
6. Fold the tortilla in half and add the shredded lettuce
7. In each tortilla, add 3 pieces fish-less fingers and top with the pineapple salsa
8. To serve, drizzle over a spoonful of the lime soured cream

Top Tips:

- Fresh pineapple can be used if preferred
- Give your salsa an extra kick of heat by adding a few dashes of Tabasco/hot sauce
- Can be made vegan by substituting the soured cream with a dairy free version/vegan mayo



Keep on file for
PLANT BASED
INSPIRATION

Meat-Free Meatball Marinara Sub

A meat-free version of a meatball sub with a handmade marinara sauce.

Serves: 2

Ingredients:

- 8 Green Cuisine Meat-Free Meatballs
- 2 sub rolls (82g each)
- 250g passata
- 1 clove garlic - sliced
- 1/2 tbs olive oil (7.5ml)
- Pinch salt (0.36g)
- Pinch pepper (0.36g)
- 1 tsp sugar (4g)
- 1 tbs balsamic vinegar (15ml)
- 6 fresh basil leaves (5g), sliced
- 50g grated Mozzarella
- 60g Rocket
- 10g Parmesan

Instructions:

1. Cook the Green Cuisine meat-free meatballs as per the pack instructions
2. In a frying pan, heat the olive oil and gently fry the garlic slices, careful not to burn them
3. Add in the passata, sugar and balsamic vinegar – season with a pinch of salt and pepper – simmer gently for 3 minutes
4. When the meatballs are ready, cook them in the sauce for 2 minutes
5. Add in the basil and stir through
6. Cut the sub rolls in half lengthways – to the bottom slice, add four meatballs and top with half of the Mozzarella, to the top half smear on some Marinara sauce
7. Bake both sides of subs face up for 5 minutes in an oven at 180°C
8. Serve as a sandwich with a salad of Rocket and Parmesan shavings

Top Tips:

- Double up on Marinara sauce and use it either as a dipping sauce or pasta sauce
- No fresh basil? Use 1 tsp of dried basil or mixed herbs instead



Planet to plate: Students' concern for the climate and how it's affecting their dining habits

Students are concerned about the climate crisis, and it's affecting their diets and lifestyles. They're playing their part, avoiding fast fashion, using public transport and reducing food waste. But they expect businesses to play a role too, valuing food brands that show commitment to sustainable practices.

7 in 10 students (73%) say they are concerned about the climate crisis

Top changes students are making to be more environmentally friendly

Q: 'What choices do you implement in your life to be more environmentally friendly?'

44%



Trying to avoid creating food waste

38%



Buying plant-based/vegan or vegetarian food

38%



Trying to use public transport over a car

32%



Avoiding fast fashion

"I am vegan and I would say that my main reason for choosing to be vegan was probably the impact it had on the climate and animals."

Student at Sheffield University

Reducing food waste

With food waste the top concern addressed by students, food operators can show leadership in this area, while saving money in the meantime.

Frozen food reduces food waste due to longer shelf life. The quality doesn't degrade, so food lands on the table as fresh as the day it was frozen. Supplementing frozen foods with local and seasonal produce saves on waste, while being more

convenient and easier for less skilled kitchen staff to prepare. This approach also satisfies the 6 in 10 students wanting more locally sourced and seasonal food on campus.

61% of students said seeing locally sourced and seasonal food on campus menus was important to them

Top features students value in food brands

Q 'What do you want to see from a socially and environmentally responsible food brand on campus?'

59%



Use recyclable packaging

39%



Use compostable packaging

31%



Show they have a transparent and responsible food chain

29%



Use carbon emission labelling

28%



Use organic status labelling

"There's strong demand for recyclable and compostable packaging on campus. Working with suppliers, caterers can review and refine packaging to meet these needs. From an end-user perspective, they could incentive students to bring in their own mugs and lunchboxes for discounted food and drinks."

Mike



"One of the reasons I did go veggie was because of the environmental impact. I try my best to keep myself educated."

Student at Sheffield University

There's hunger for more information, with students interested in food supply chains, carbon emissions and organic status labelling. Nearly half (48.9%) want better labelling on menus to communicate the sustainability and eco credentials of food. And 1 in 5 would like interactive app-based menus communicating sustainability and eco credentials.

"Students are choosing plant-based or vegan food because of environmental concerns, but more than a third say they want more choice. To address this, operators could try boosting the number of plant-based options on menus, subbing meat alternatives for the real deal in dishes like fish and chips, burgers and meatballs. This has the bonus of keeping meat eaters happy, while tempting curious carnivores to try lower impact plant-based alternatives."

Holly

Spotlight on Sheffield University

Sheffield University is challenging norms when it comes to student food provision on campus running a number of sustainable and ethically minded initiatives that benefit people and the environment, both locally and globally.

The View Deli within its student union is a meat-free café which stocks exclusively vegetarian and vegan food, whilst milk at all university catering outlets is sourced from Our Cow Molly – a local Dungworth farm who have gained attention in recent years after winning the BBC Food and Farming Awards in 2016 for their business model which puts emphasis on minimal food miles and minimal carbon output. The two organisations began working together as part of Sheffield's Made Together programme which is aiming to make the region healthier, greener, more vibrant and innovative through collaborative partnerships.

As part of this the university created a tap system for using milk from a refillable churn rather than buying in plastic cartons, which is cutting the carbon footprint of milk delivery to the university by 65%.



Serving success:

Enhancing the student eating experience

YOUR TAKEAWAYS FOR SERVING SUCCESS

APPLY YOUR UNDERSTANDING OF THE STUDENT PROFILE

Balance price and food quality with speed and convenience when planning menus.

Look at what popular high street restaurants and brands are doing and integrate ideas into your dishes.

Prioritise the top cuisines that students love, including Chinese, Indian, British, Mexican and American.

Fast-formats that can be eaten on the go are preferable.

Pizza, sandwiches, burgers, wraps and salads may be old classics, but they are still all-round winners.

MARKET MENUS CAREFULLY

Consider using limited time offers (LTOs) to drive footfall and create a buzz across social media.

Keep in mind how packaging and labelling communicates nutritional information and encourage bring-your-own containers.

Consider how technology can be used to communicate sustainable credentials.

OPTIMISE MENUS

Be sure to highlight the flavour and ingredient credentials of any plant-based dishes, rather than specifying what they are missing in comparison to meatier ones.

Offer personalisation of dishes and scalable meals, with a variety of meat and plant-based proteins, along with more decadent toppings and additions to help drive incremental spend.

TAP INTO DEMAND FOR QUICK, HEALTHY AND SUSTAINABLE DISHES

Offer high protein meals and snacks that will keep students full.

Serve plant-based versions of traditional favourite dishes which don't compromise on flavour. Offering a variety of choice is key.

Use a combination of frozen, seasonal & local ingredients and highlight their eco and health credentials in menu descriptions.

WELCOME TO THE PLANT AGE!



A growing number of students have shown that they are keen to embrace a flexitarian, meat-reduced, or even a meat-free lifestyle which is better for them and better for the environment.

As an early pioneer of the plant-based movement, Green Cuisine is on a mission to make it easy for everyone, students included, to enjoy the benefits of plant-based with products that are convenient, tasty and nutritious.

With a Chicken-Free range featuring Dippers and Southern Fried Strips, a Meat-Free range featuring sausages, burgers and meatballs, as well as a Fish-Less range featuring battered and breaded fingers and fillets, there's a plant-based option for every dish.

Why Green Cuisine?

Made with a specially selected variety of plant-based proteins Green Cuisine extracts the nutritional goodness and then adds its own combination of herbs and spices for a sensational meat-free taste experience.

With all products being frozen, the goodness from essential vitamins and nutrients are locked in, whilst food waste can be reduced through careful stock management - offering convenience and great value.

Many of the products are naturally low in fat, rich in fibre, iron and protein and meet the 2024 salt targets.



Chicken-Free Dippers



Fish-Less Fingers



Meat-Free Burger





Visit the Green Cuisine website to discover more:

birdseyefoodservice.co.uk/green-cuisine-products



birdseyefoodservice



Birds Eye Foodservice



Birds Eye Foodservice