



The Power Of Pizza

The what, how, and why
of the in-school pizza
experience

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The Family Room

+1 203 523 7878 | 41 N Main Street, Norwalk CT 06854

www.familyroomllc.com





Our Objective

To update our understanding of the power of pizza in the context of the middle/high school cafeteria and uncover opportunities to make it more appealing to kids and more relevant to school foodservice managers.



Project Methodology Close-Up

Qualitative

We conducted a total of **eight** in-home Friendship Triads with teens in the 7th, 8th, 9th and 10th grades (4 male & 4 female Triads). The sessions were split equally between two markets and were be a total of 90 mins in length. Sessions took place in New York (Queens, Bronx), New Jersey (Fort Lee, Newark), Philadelphia (Bala Cynwyd, Philly Proper) with teens who purchased school lunch at least 2/week and pizza at least 3/month.



Quantitative

- N=300 middle school and high school students in the New York, Philadelphia and Washington D.C. areas.
 - N=150 grades 6-8
 - N=150 grades 9-11
 - Equally split boy vs girl
 - Quotas for ethnicity
- 15-20 minute online survey
- Begin screening with parent, then ask questions of student





School Lunch Is About Being With Ones You Trust

For these kids the most important emotional priorities are letting their guard down and finding a moment to be themselves.



**Being Silly
& Laughing**

**52% of total
respondents**



**Having Friends
I Can Trust**

**49% of total
respondents**



**Comfort
In The Familiar**

**36% of total
respondents**



**Escaping From
Pressure & Stress**

**31% of total
respondents**

Kids told us that their school days are mostly not in their control, doing things that others want them to do which makes lunch a time for them.

I have teachers telling me what to do all day long. Lunch is a break where I can do what I want.

~ Brian, 9th grade (NY)



I can't express myself in classes, I can't be silly around parents. I have to stay focused all day long.
~ Laura, 10th grade (PA)

And reconnecting with a close circle of friends you can trust has become a dominant emotional priority for teens today.



2018 Gen Z
Passion Point™ Study

Historically, Gen Z's emotional priorities surrounding sociability and friendship all lived in a single Passion Point™. But in 2018 we saw a fascinating change: Friendship and sociability dividing into two separate Passion Points™.

Pre-2016



My Friends
Spending time
with my friends

Post-2016



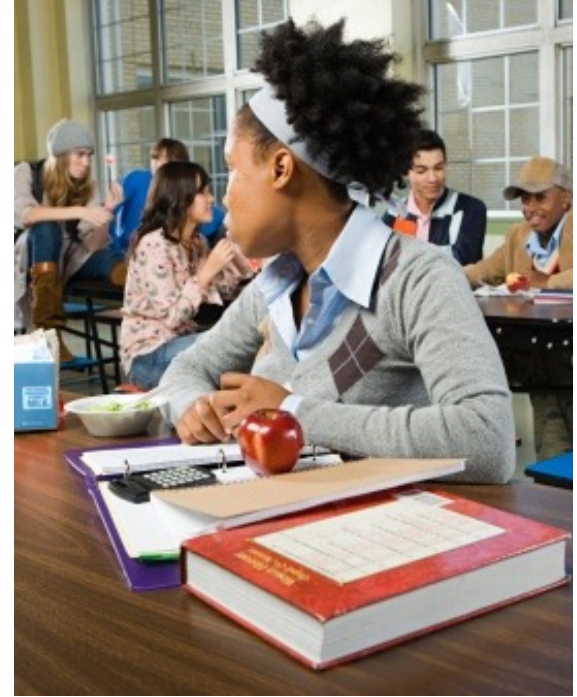
My Tribe
Having close friends I can
trust and who support me
no matter what



Hanging Out
Hanging out and having
fun with my friends

And as we heard in our interviews, the lunch seating arrangements aren't based on exclusion or clique, they are based on a circle of trust.

- There was very little discussion of being self-conscious about the foods kids pick or how much they eat. As a matter of fact, kids pushed back on the fact that their friends would do that.
None of my friends would say anything about what I was eating. They don't care. ~ *Emma, 6th grade (NJ)*
- There was not much conversation about exclusiveness and cliques when it came to seating. We often heard the opposite, kids were likely to sit with someone who was feeling down or alone. There was a sense that they are trying to be more inclusive and caring about others.
If someone is sitting by themselves upset, I will go over and try to cheer them up or talk to them. ~ *Vadeem, 10th grade (PA)*





And Kids Today Don't Feel Rushed

What we heard in qual was that while lunchtime is still hectic, kids today are better able to get what they need and still have some time to themselves.

- It is still a short time, but kids seem to feel that this is enough time to do what they want to.

I can eat, visit my friends and spend time writing my music by myself.

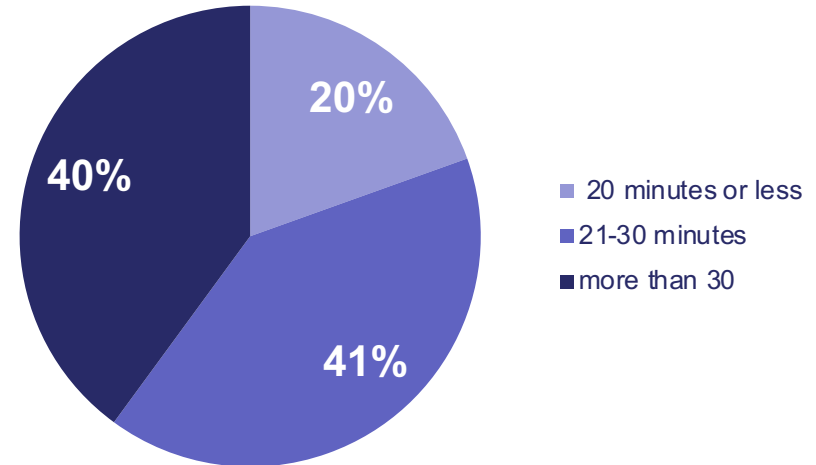
~ Brian F. 9th grade (NY)

- Kids did not convey the sense of a mad dash but more of an atmosphere of fast but controlled activity.

It is loud with lots going on. I eat with one table and move around to visit different friends once I'm done eating.

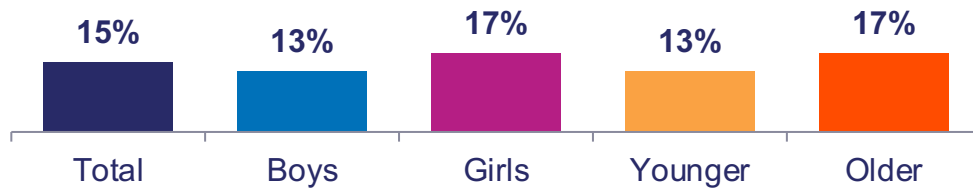
~ Emma S. 6th grade (NJ)

80% of respondents said they have more than 20 minutes for lunch.



This was also reflected in the quant where less than 20% of kids felt really rushed during their lunchtime.

Feel Really Rushed TB

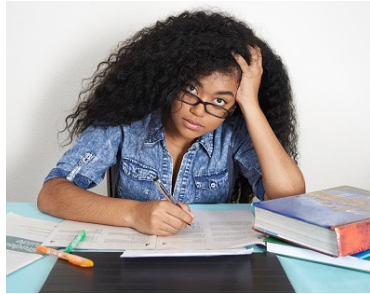


Most of the kids we spoke with talked about being stressed before lunch, but lunch itself is actually a welcome relief.

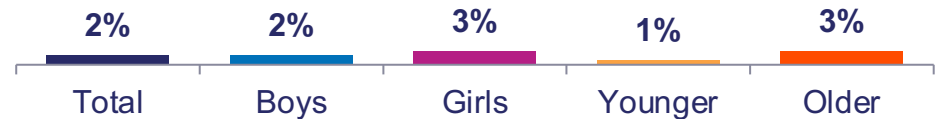
I have AP Bio before lunch. It's a really hard class. I am stressed...I look forward to lunch with my friends to relax. ~ Laura G. 10th grade (PA)

I had a test that day. I am not good at math so I knew I didn't do well. I was excited to get out of that class for lunch. ~ Jacob C. 8th grade (NY)

There is so much work to do and I am so busy all day. Lunch is a break from worrying about my grades and what I have left to do. ~ Aseem L. 10th grade (PA)

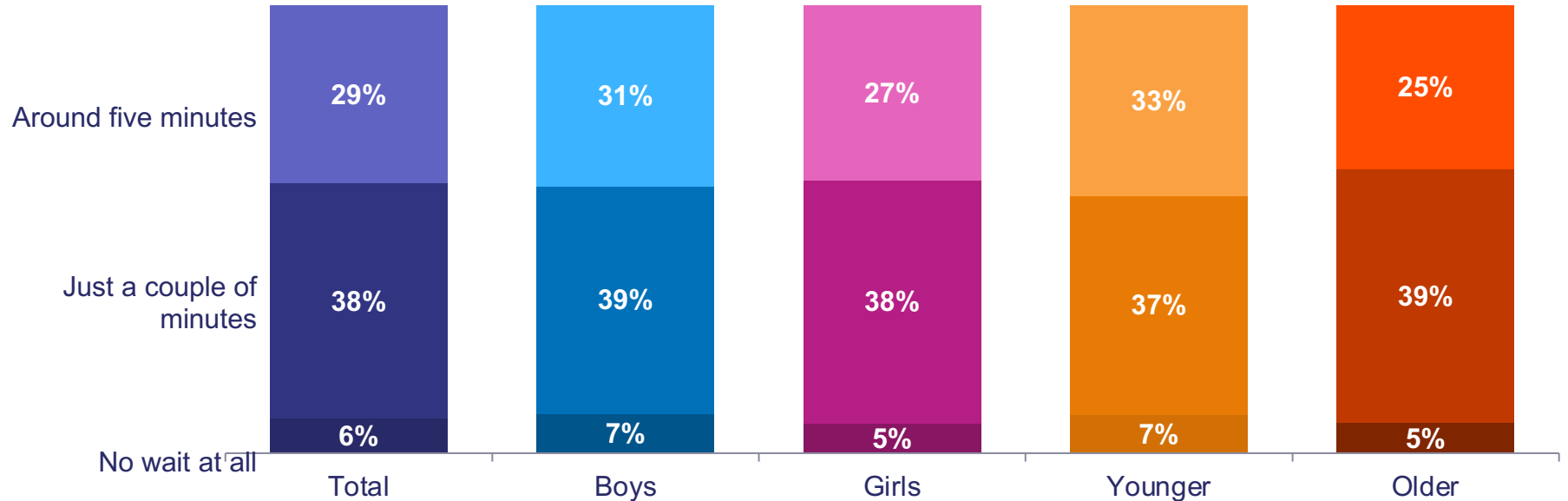


Feel Really Stressed At Lunch TB



The fact that over 70% said the wait for food was five minutes or less contributes to this feeling of lunch being relaxed.

Wait time for food

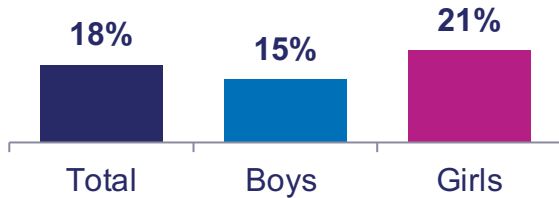


A photograph of three young women in a school cafeteria. They are standing in a line, looking at a food tray. The woman on the left is smiling and looking towards the other two. The woman in the middle is looking at the food. The woman on the right is also looking at the food. The background shows a typical school cafeteria setting with metal trays and food items.

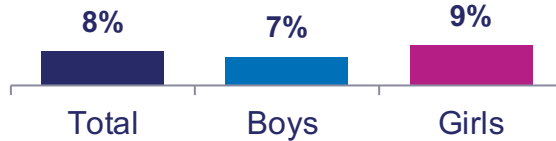
Visual Appeal Is The Key Driver Of The Foods They Select

There are a bunch of attributes that adults deem important, but kids don't seem to care about them in our quant and we didn't hear much about them in qual either.

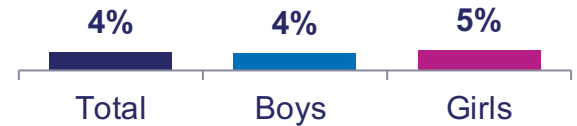
 How Healthy It Is



 Greasy

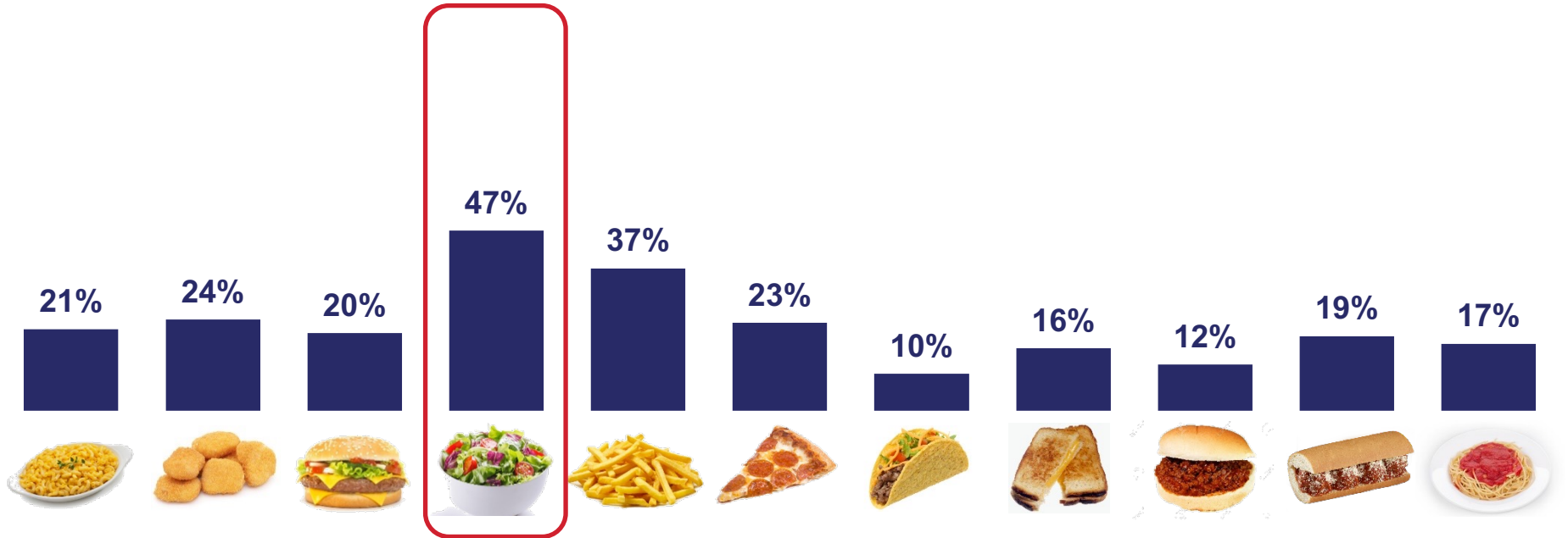


A Lot Of Calories



But interestingly the most frequent choice for kids is salad.

Foods purchased at school 3+ times a week

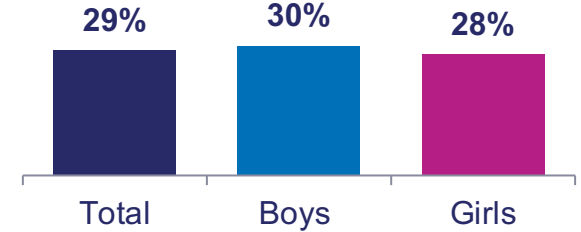
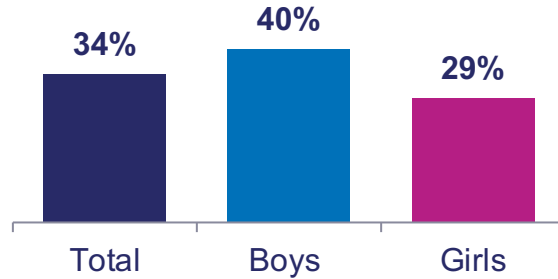
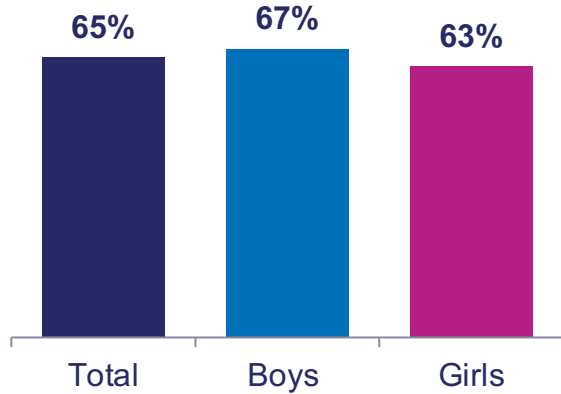


Which may have more to do with its visual appeal than pure health concerns.

 Looks Appetizing

 Fills Me Up

 Cooked Well



The importance of visual appeal also came through loudly in the qual and was a major factor in what kids avoided.



You can tell when the cucumbers are old. They have a slimy clear part to them.
~ Dylan, 10th grade (PA)



The cheese looks hard and congealed. I don't want to eat that.
~ Zuniga, 9th grade (NY)



The meat looks grey and hard. Like a hockey puck. Gross!
~ Antonio, 8th grade (NJ)



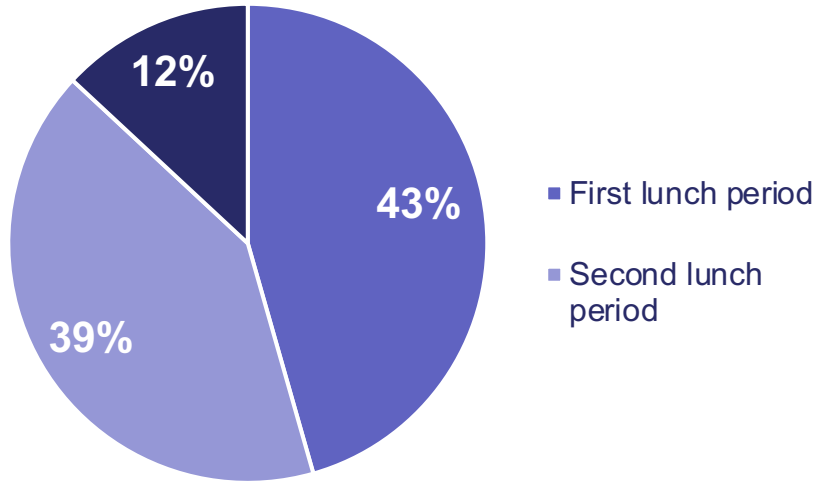
The bottom of the pizza is really burnt some days. I will get something different.
~ Heather, 7th grade (PA)



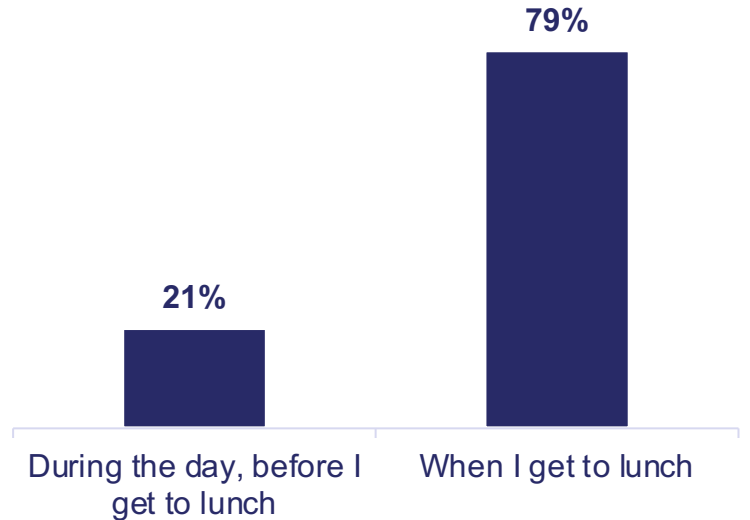
How Kids Pick Their Lunch And When They Have Lunch Impacts Their Satisfaction

Kids typically have one of three different lunch periods they maybe assigned to and some have to choose their lunch when they get to school.

Kids By Lunch Period

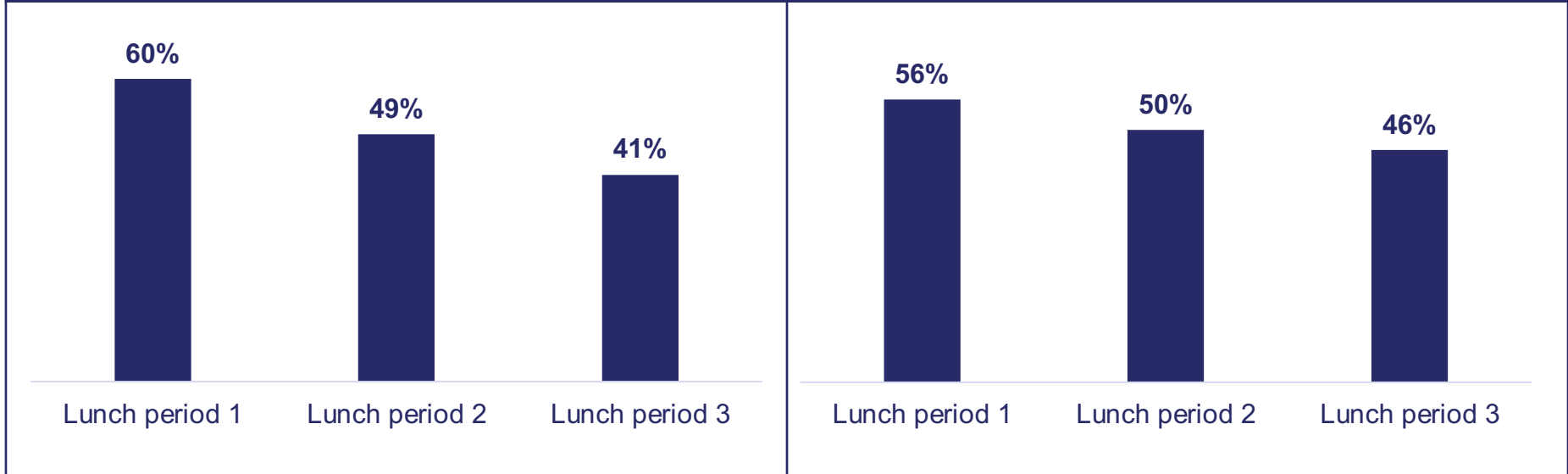


Kids Ordering Early Vs. At Lunch

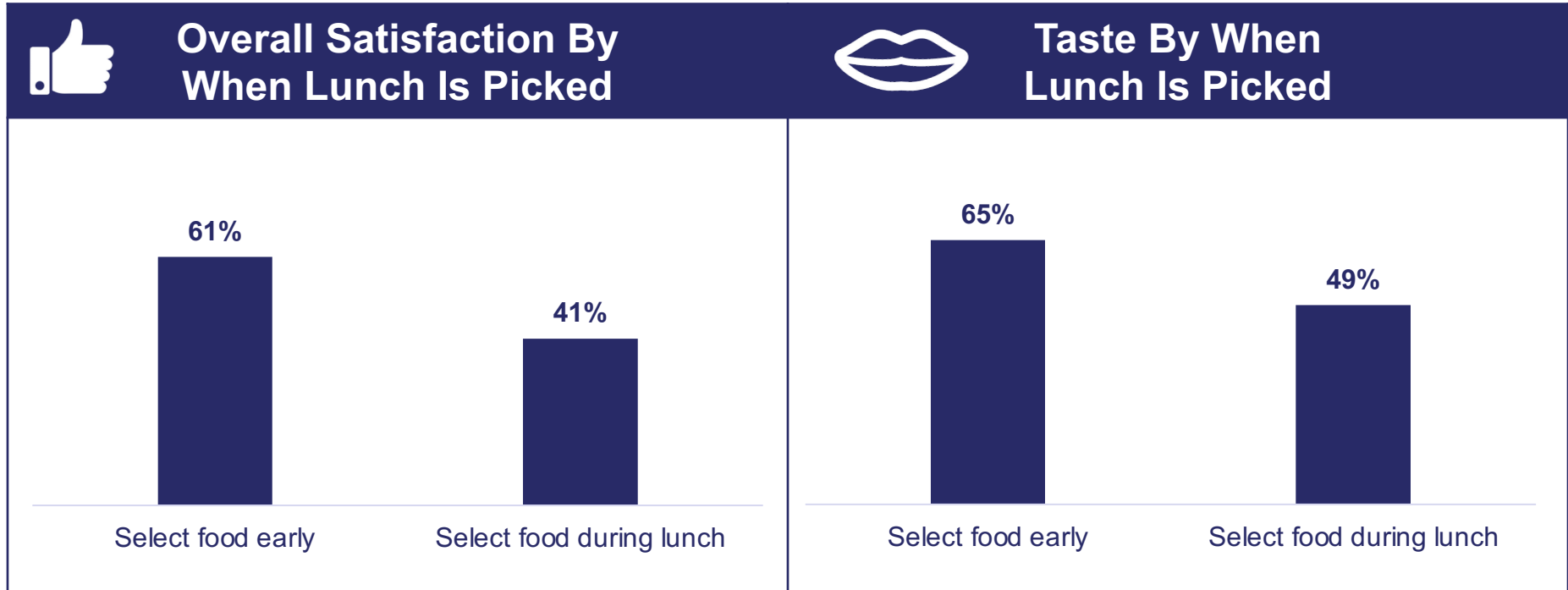


And the lunch period they are assigned to seems to have an impact on overall satisfaction and taste.

 Overall Satisfaction By Lunch Period  Taste By Lunch Period



And similarly those who select their lunch in the morning tend to have higher satisfaction levels overall and with taste.

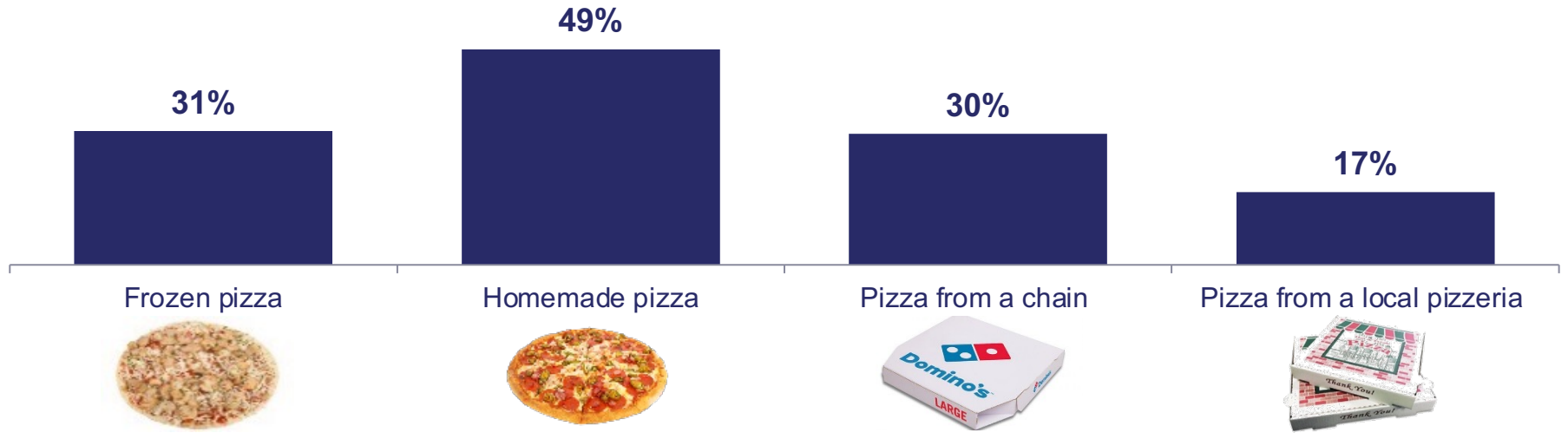


A photograph of two young men sitting at a table in a school cafeteria. The man on the left is smiling and holding a banana. The man on the right is looking at him and holding an orange. The background is blurred, showing other students and tables. The text is overlaid in the center of the image.

Kids Eat A Lot Of Pizza But They Are Not Big Fans Of School Pizza

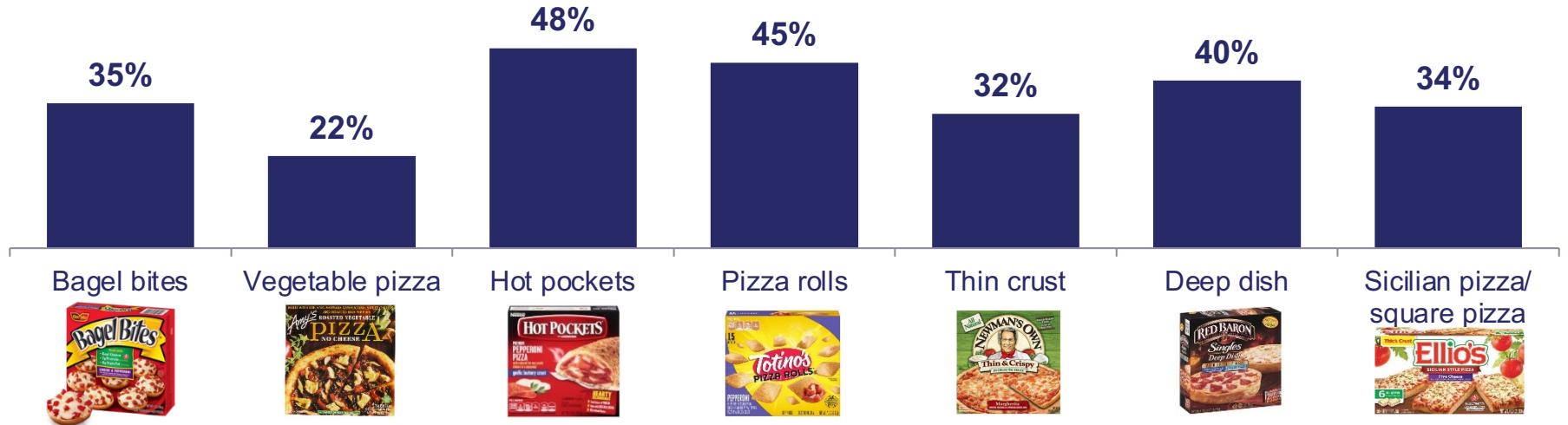
Pizza is an everyday food for these kids and they consume a variety of pizza types on a regular basis.

Eat once a week or more



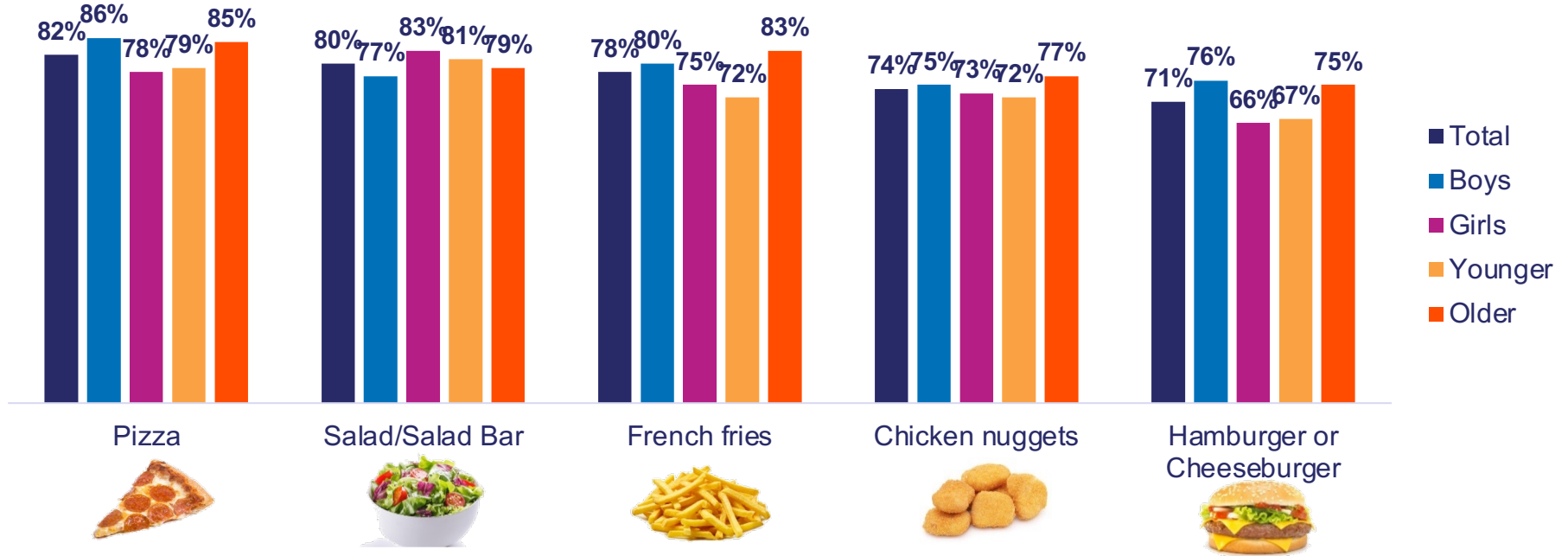
And kids love a variety of pizza forms when consuming at home.

Kids who love type of pizza



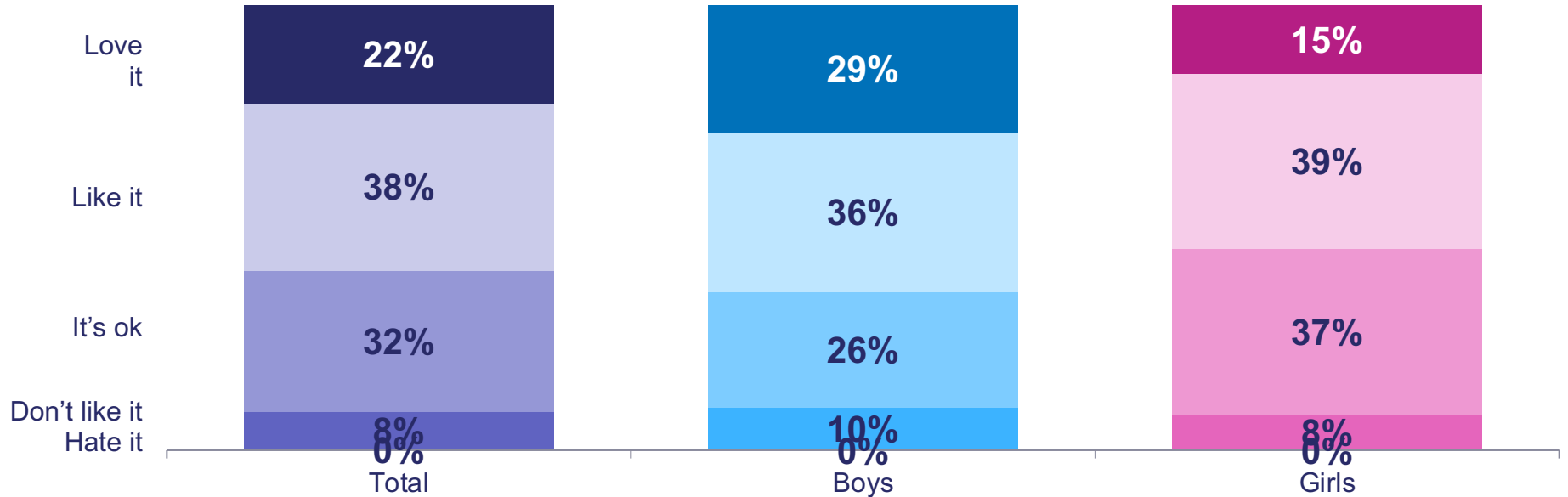
The popularity of pizza extends to school, where more kids say they consume it than any other option.

Eaten once a week or more



But only about a fifth of kids really love school pizza with girls having a much lower affinity.

How kids feel about school pizza



Overall, kids told us school lunch pizza was often closer to the attributes that make pizza unappealing.

Feels Like It Has Been Reheated

Not Filling Enough

Tolerable

Disgusting

Too Burnt

Not Hot

Too Plain

Gross

Dry

Slices Are Too Small

It Feels Like Frozen Pizza

Crust Is Too Thin

Same Pizza Since I Was 6

Greasy And Oily

Not Enough Toppings



This is reflected in how few kids say they love key aspects of school pizza.

How kids feel about different parts of pizza
% saying "I love it"



School pizza is not seen as something that is made with a ton of care, to kids it feels like a frozen pizza that was thrown in the oven and reheated.

It just feels like they throw it in the oven and don't put any care into making it.

~ Vadeem, 10th grade (PA)



There is no love that went into making the pizza at school.

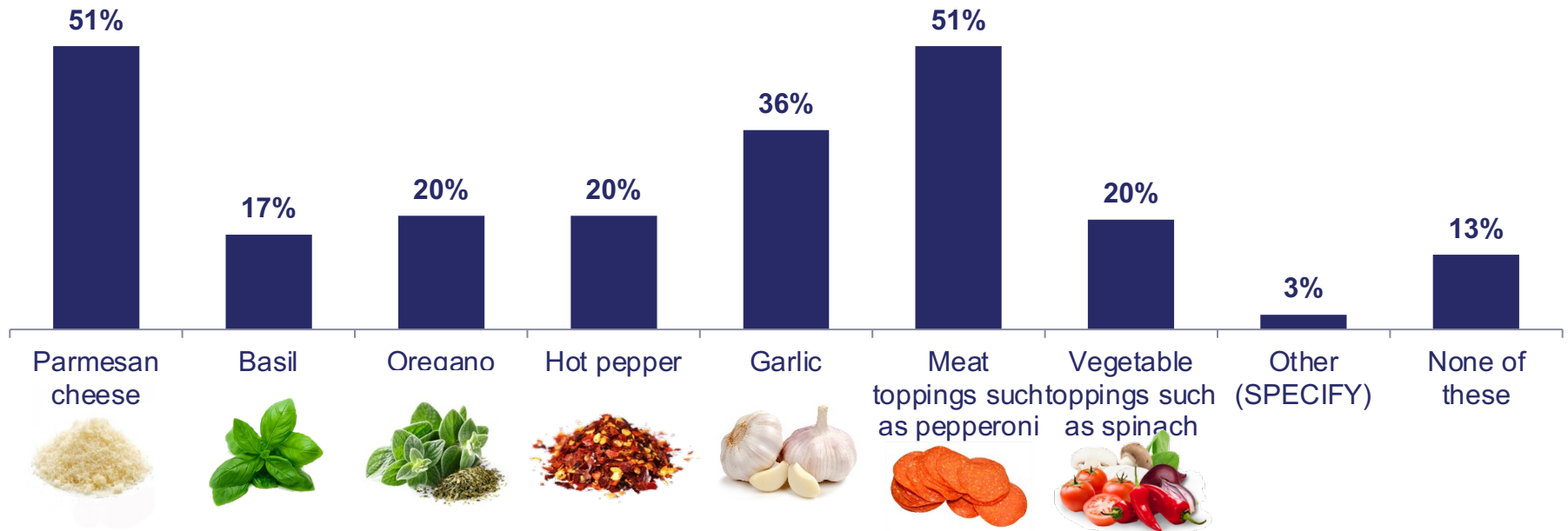
~ Nahomi, 9th grade (NY)

When asked to create the perfect school pizza, respondents often choose the following attributes...



Toppings are one way most kids felt school pizza could be less boring and more fun to eat.

Desired school pizza extras



A group of four young adults (three women and one man) are sitting around a wooden table, eating and talking. They are all smiling and appear to be in a casual, friendly setting. The table is set with various food items, including what looks like pizza, a smoothie, and some fruit. The background is a simple, bright indoor space with large windows.

Key Takeaways

Key Takeaway 1. Kids feel less rushed, more in control.

- Kids experience and association with school lunch has changed a lot since we last did this study. Even though the time is still short, the frenetic rush is not evident and kids are better able to get the food they want and still have time for friends.
- Pre-ordering lunch appears to take the stress out of the food ordering process and help kids have more control over what happens during the lunch period.



Key Takeaway 2. Lunch is a time to bond and express themselves.

- The true role of lunch period is not food but for kids to have time to be themselves with friends they trust completely.
- It is the one part of the day when they feel they don't have to do what others want but can express who they are. Finding ways of extending this feeling to the foods they eat can better integrate the food with the emotional drivers of the occasion.



**Being Silly
& Laughing**



**Having Friends
I Can Trust**



**Comfort
In The Familiar**



**Escaping From
Pressure & Stress**

Key Takeaway 3. School pizza is a favorite, but does not live up to expectations.

- Pizza is a favorite food both at home and school but given how often these kids consume pizza, school pizza can seem ordinary and not special.
- The most important drivers of choice for lunch foods are visual appeal and satiety and on both counts kids don't feel school pizza consistently excels.



Key Takeaway 4. Appearance and appetite appeal are the key changes kids want.

- In both our interviews and the quantitative findings, kids were clear about what they wanted when it comes to school pizza.
- These changes would bring the school pizza experience closer to the experience they get with the pizza they get at home.



Thank You!



George Carey
Founder & CEO
gcarey@familyroomllc.com
+1 203. 523. 7826



Sam Evans
Vice President
sevans@familyroomllc.com
+1 847. 602. 2533



Philip Kurien
Managing Director,
Strategy & Innovation
pkurien@familyroomllc.com
+1 203. 523. 7832



Eric Wolfeiler
Senior Director,
Quantitative Research
ewolfeiler@familyroomllc.com
+1 203. 523. 7811



Lisa Wilson
Sr. Manager, Strategy &
Qualitative Research
lwilson@familyroomllc.com
+1 203. 523. 7833