

# New York School Nutrition November 3, 2011

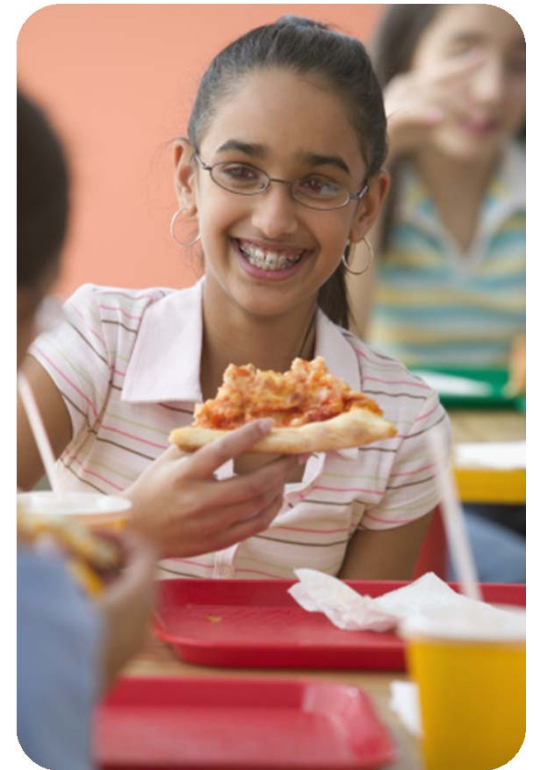
## Re-Thinking School Pizza

### *Quantitative Research Results & Recommendations*



## Today's Agenda

- A Brief Introduction to The Family Room
- Background & Objectives
- Quantitative Research Methodology & Study Findings
  - School cafeteria & lunchtime environment
    - Social/emotional context
    - Buying vs. bringing lunch
    - “Gold Standard” in lunch
  - The Pizza Experience: In and Out of School
    - Attitudes/Perceptions Towards Pizza
    - Points of Passion
    - Barriers to School Pizza
- Implications & Recommendations



What We Do...

A Single-Minded Focus On *Transformational* Strategic & Executional Family Innovation

**Kid & Family Research**



Advanced Kid And Parent Trends

Custom Qualitative

Custom Quantitative

Syndicated

**Strategy & Established Brand**



Re-Inventing Established Kid/ Family Brands

Line Extending Iconic Kid/Family Brands To New Categories And Occasions

Unlocking The Value Of Adult Brands In The Family Market

Super-Charging And Restoring Relevance To Struggling Kid/ All Family Brands

**New Product & Program Innovation**



Transformational New Products

- Foods, HBC, Toys And Entertainment
- Child Health And Well-Being
- Non-Traditional Kid Categories

New-To-The-World Programs

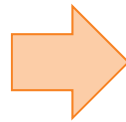
- In-and-Out Events
- Ongoing Programs

## What We've Been Up To Lately...

Creating lots of successful new products...



Crafting brand positionings/  
growth framework for the world's  
Most iconic kid brands...



Helping conceive and construct  
the first kids' museum  
in the kingdom of Saudi Arabia...



Going deeper on family decision  
making and a creating a new  
approach to family marketing that  
better reflects its new realities....



## Background

- Just Kid Inc. / The Family Room conducted qualitative research for Dairy Management Inc., (DMI) in 2009 among kids/teens in Chicago and Norwalk, CT, to better understand the broader context in which pizza lives and the pizza landscape (both in and out-of-school), including kid/teen attitudes, perceptions and experiences.
- Previous DMI qualitative showed that there was a disconnect between Food Service's perception of kid/teen satisfaction and actual feelings kids/teens have about school pizza. American Dairy Association and Dairy Council Inc. would like to understand the current/existing level of satisfaction with school pizza in the extended NY area to potentially improve/upgrade the taste profile.
- American Dairy Association and Dairy Council Inc. has partnered with The Family Room to conduct a quantitative study in the extended NY area to get at these questions.

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## Study Objectives

- Understand the in-school lunch experience (environment, decision making and influencers, social/emotional context, Gold Standard in lunch)
- Understand the broader context in which pizza lives (what pizza means to them, how it fits into their lives, points of passion and ideals, barriers, etc.)
- Understand kid/teen attitudes, perceptions and experiences with school pizza (why or why not chosen, pizza vis a vis other options, satisfaction/dissatisfaction, strengths/weaknesses)

## *Quantitative Methodology & Study Findings*

### *School Cafeteria & Lunchtime Environment*

## Research Methodology

- **Research fielded in May, 2011**
- **15-minute online survey with N=200 kids age 12-15**
  - N=150 from NYC metro area
    - New York counties: Bronx, Kings, New York, Nassau, Queens, Richmond, Suffolk, Westchester
    - New Jersey counties: Essex, Hudson, Passaic
  - N=25 from Buffalo, NY metro area (Erie county)
  - N=25 from Rochester, NY metro area (Monroe county)
  - All kids screened to eat school lunch at least once a week
  - Even gender representation across ages
  - Ensured representation of African-American and Hispanic

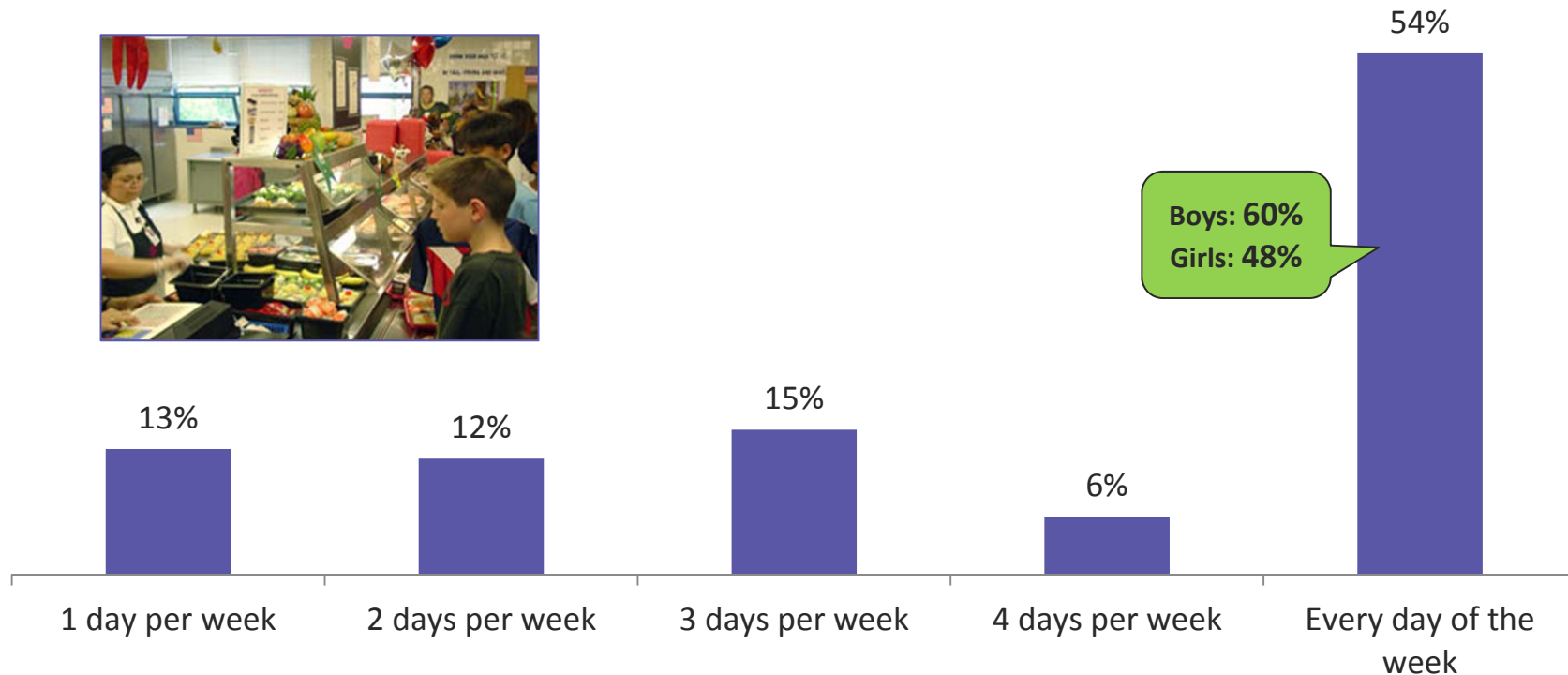


- **Questionnaire topics:**
  - School Lunch Topline: Atmosphere/emotions at school lunch, foods selected, satisfaction with hot meals served, popularity of bringing lunch vs. school lunch (and specific popular items/brands)
  - School Pizza Deep Dive: Frequency of schools serving pizza, frequency of getting school pizza, reasons for getting/not getting school pizza, satisfaction overall and with individual components of school pizza, comparison of school pizza to pizza from other sources, taste comparison of school pizza to other school meals, and ways to improve school pizza

**We Talked To A Sample Of Kids Who Eat School Lunch At Least Once A Week –  
But Among This Group, Over Half Of Kids Had School Lunch Every Day Of The School Week**

*Boys tended to eat school lunch a bit more often than girls did*

**Frequency of Getting School Lunch**  
(All Kids: % Indicating)

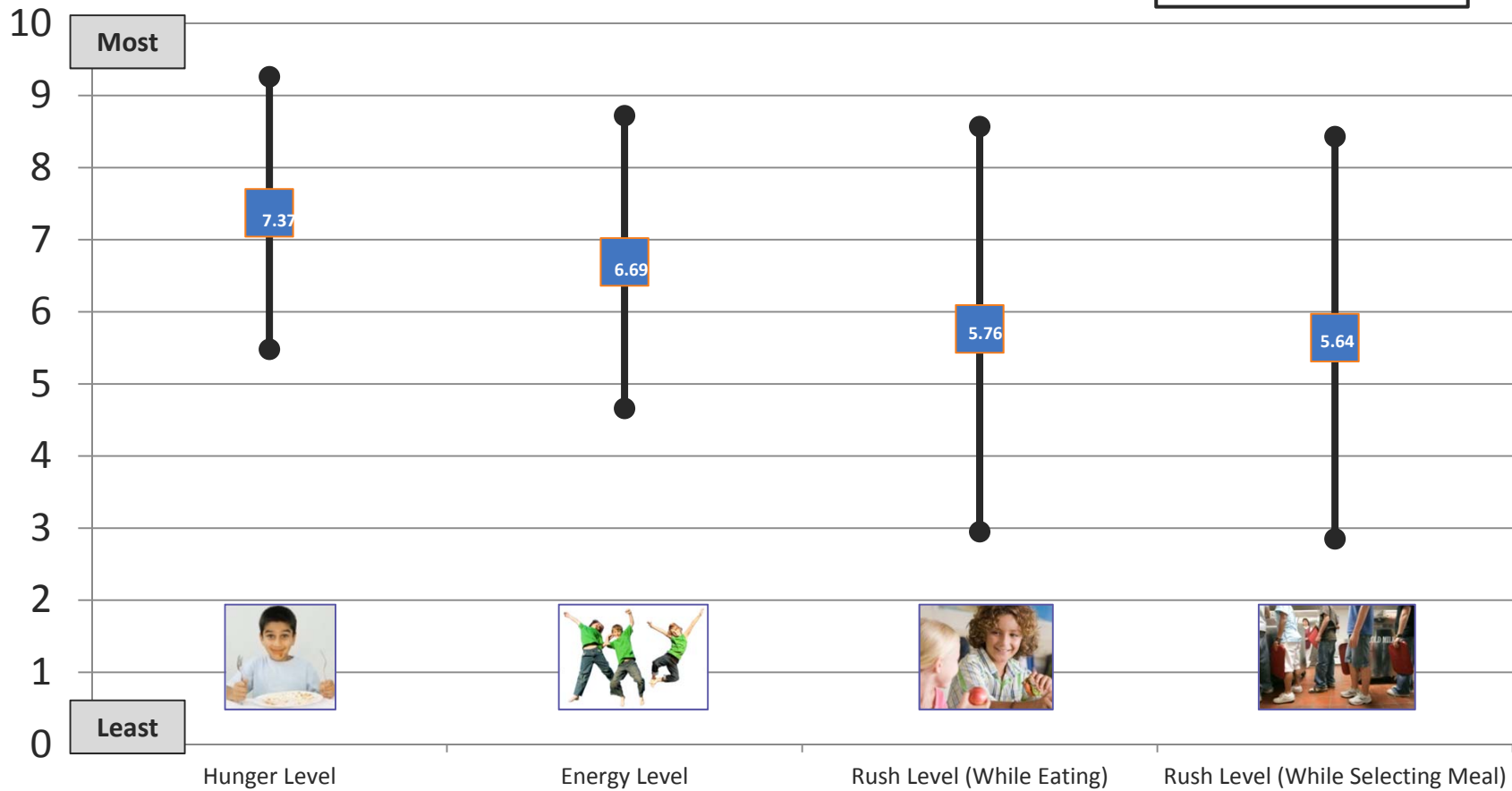


Q5: Please think about the lunches you eat at school. On average, how many times per week do you get your lunch from your school cafeteria?

## Kids Told Us That At School Lunch, They Are Very Hungry, Moderately High On Energy, And Feeling Slightly Rushed

How Kids Feel During School Lunch  
(All Kids: Mean Score and Standard Deviation)

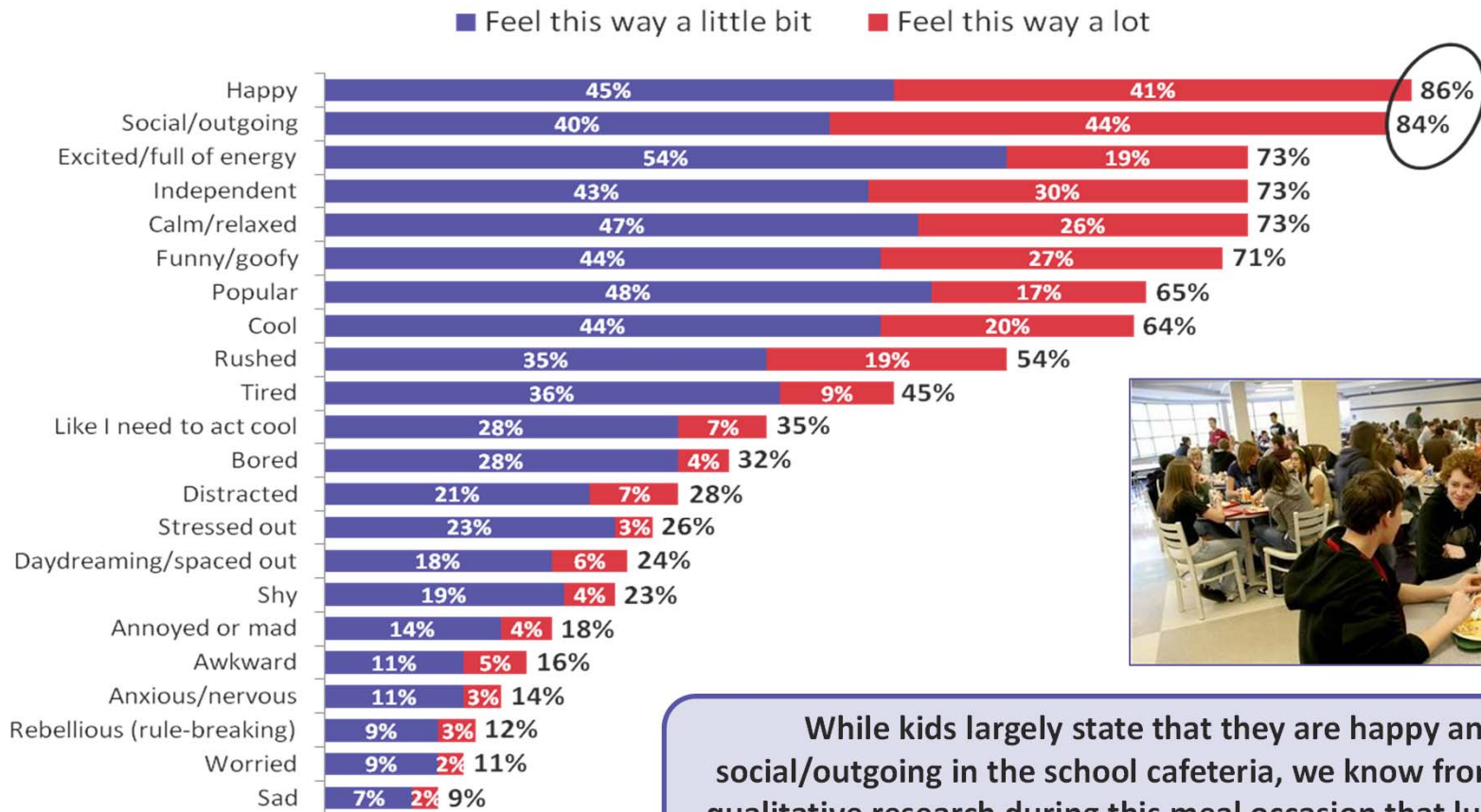
 = Mean Rating  
 = Standard Deviation



Q6: For each of the following questions, please provide a rating between 1 and 10.

## Kids Say That Above All Else, They Feel Happy And Social/Outgoing During School Lunch

### Emotions Kids Feel During School Lunch (All Kids: % Indicating)

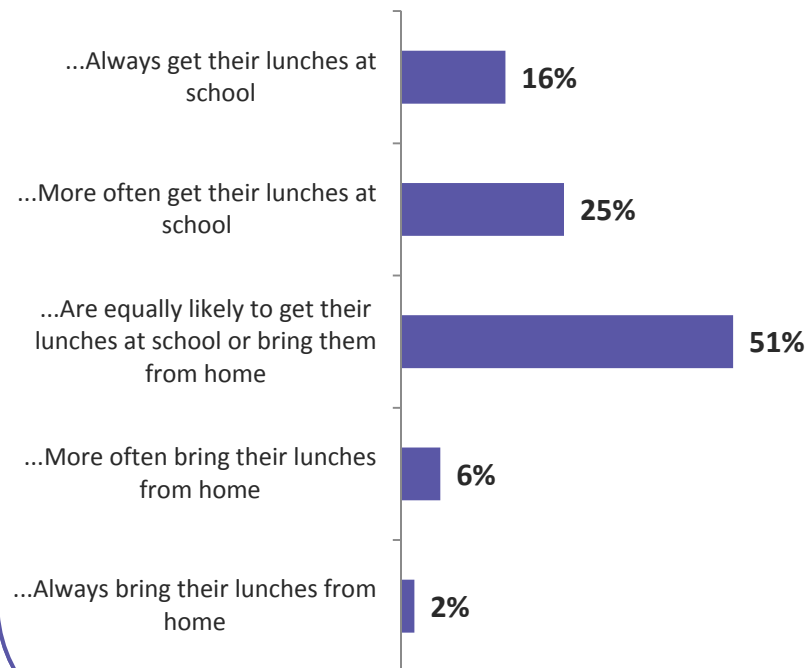


While kids largely state that they are happy and social/outgoing in the school cafeteria, we know from other qualitative research during this meal occasion that lunchtime can be equal parts fun and stress.

Q7: Below is a list of different ways that kids might feel during lunch at school. For each emotion, please tell us how much you feel that way during a typical school lunch.

## Buying Vs. Bringing Lunch Appears To Be A Practice That Is Nearly Split Among The Popular Crowd; However, Despite What The Popular Kids Are Doing, It Is Clear That Getting Lunch At School Is Viewed More Positively Than Bringing It

**Popular Kids...**  
(All Kids: % Indicating)



### Bringing Lunch Isn't Cool

- "Geeky kids tend to bring lunch from home."
- "Bringing food from home just isn't cool."
- "It's not as nerdy as bringing lunch in a bag... there are more choices, too."
- "You kind of look funny bringing in a bag from home."
- "You look like a dork carrying a lunch."



Q10A: Would you say that the more popular kids at your school tend to bring their lunches from home, or get their lunches at school?

Q9: Overall, how satisfied would you say you are with the hot meals in served in your school's cafeteria?

## There Are Other Positive Associations With Kids Who Get Lunch At School, And Interestingly, Obtaining Lunch At School Satisfies Tween/Teen Needs



### School Lunch Shows You're Grown Up

- "It shows you don't need mommy to pack you food to survive."
- "It's not cool to bring your lunch that your parents made for you."
- "It's kinda babyish to bring lunch from home."
- "Buying lunch shows you have more independence."



Empowerment and Mastery



Identity & Independence



### School Lunch Shows You Have Money

- "Bringing lunch to school means that you don't have much money to buy lunch at school because it is expensive."
- "Food is expensive. Therefore, buying food means you're rich."
- "Lots of kids at my school like to show off how much money they have. They don't like to carry food in bags or lunch containers."



Identity & Independence



### School Lunch Offers A Chance To Be Social

- "You get to walk around and talk when you buy lunch."
- "When you're waiting in line with everyone, you get to talk. But if you bring your lunch from home, you're often sitting at your table alone for a while."
- "It's a way to 'be seen.'"



Acceptance & Belonging

**When it comes to buying vs. bringing lunch, there are clear perceptions – buying lunch is more aspirational for kids as it allows them to feel and show others they are “adult” and independent, and also allows them to further their “cool” factor.**

Q10B: You told us that popular kids at your school [always/more often] get their lunches at school. Why do you think it is more popular to get lunch at school?

Q10B: Are there certain foods that popular kids tend to get at school? Why are these foods popular? Please be as detailed as possible.

**Despite The Positive Associations With Getting Lunch At School, Satisfaction With Cafeteria Food Is Only About 50%, With Only 9% Being “Extremely” Satisfied...**

**Satisfaction with Hot Meals in School Cafeteria**  
(All Kids: % Indicating)

Level of Satisfaction	%
Extremely satisfied	9%
Somewhat satisfied	43%
Neither satisfied nor dissatisfied	22%
Somewhat dissatisfied	17%
Extremely dissatisfied	9%

**Top 2 Box Satisfaction**



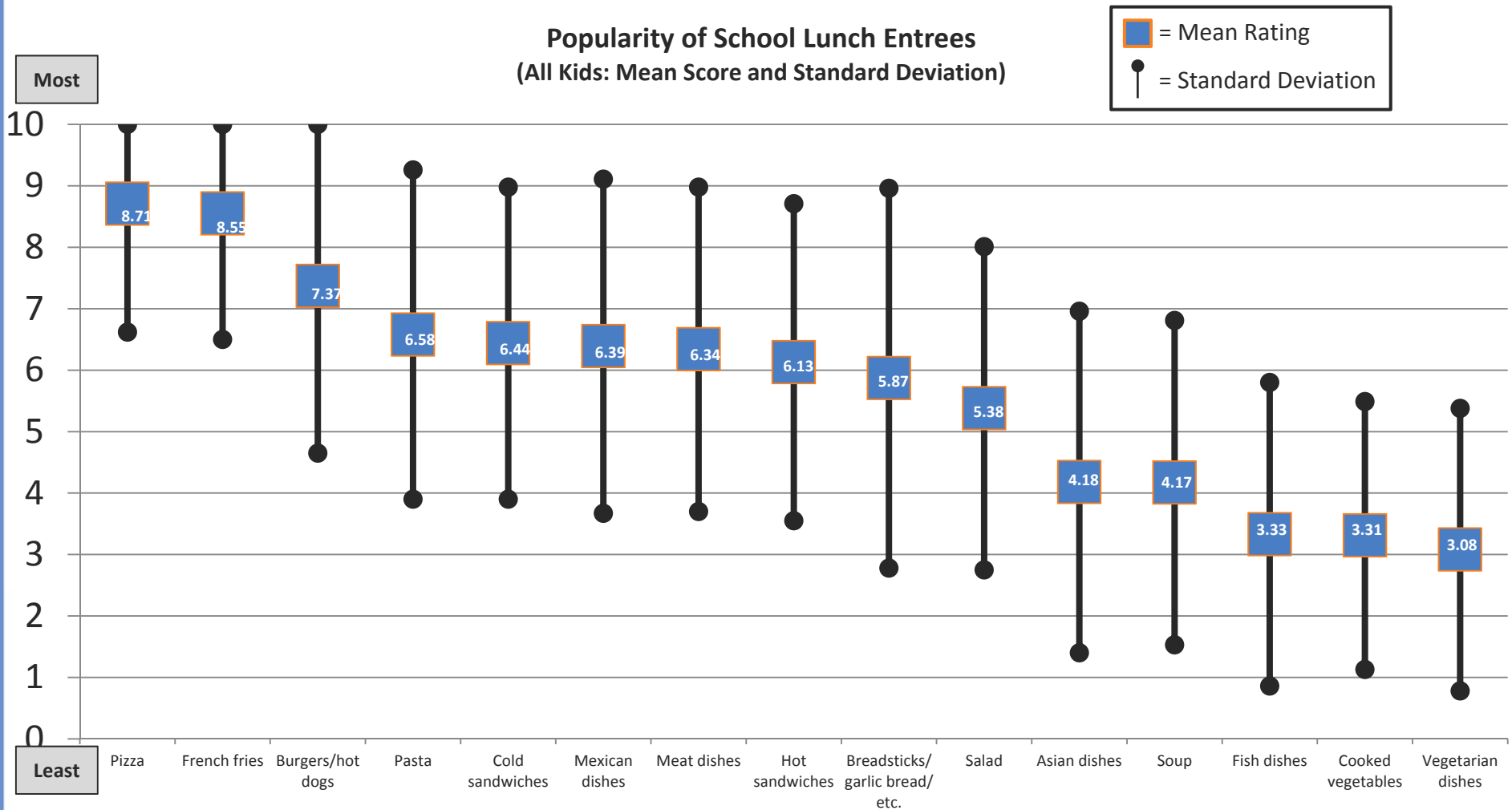
**From an emotional perspective, there are no big barriers to buying school lunch – in fact, there is “badge” value associated with buying vs. bringing. Given this, there is an opportunity to grow the size of the target through either improvement of existing options or innovation (to lift satisfaction ratings and potentially attract new kids).**

Q10A: Would you say that the more popular kids at your school tend to bring their lunches from home, or get their lunches at school?

Q9: Overall, how satisfied would you say you are with the hot meals in served in your school’s cafeteria?

## Interestingly, Pizza Was Rated The Most “Popular” School Lunch, Followed Closely By French Fries

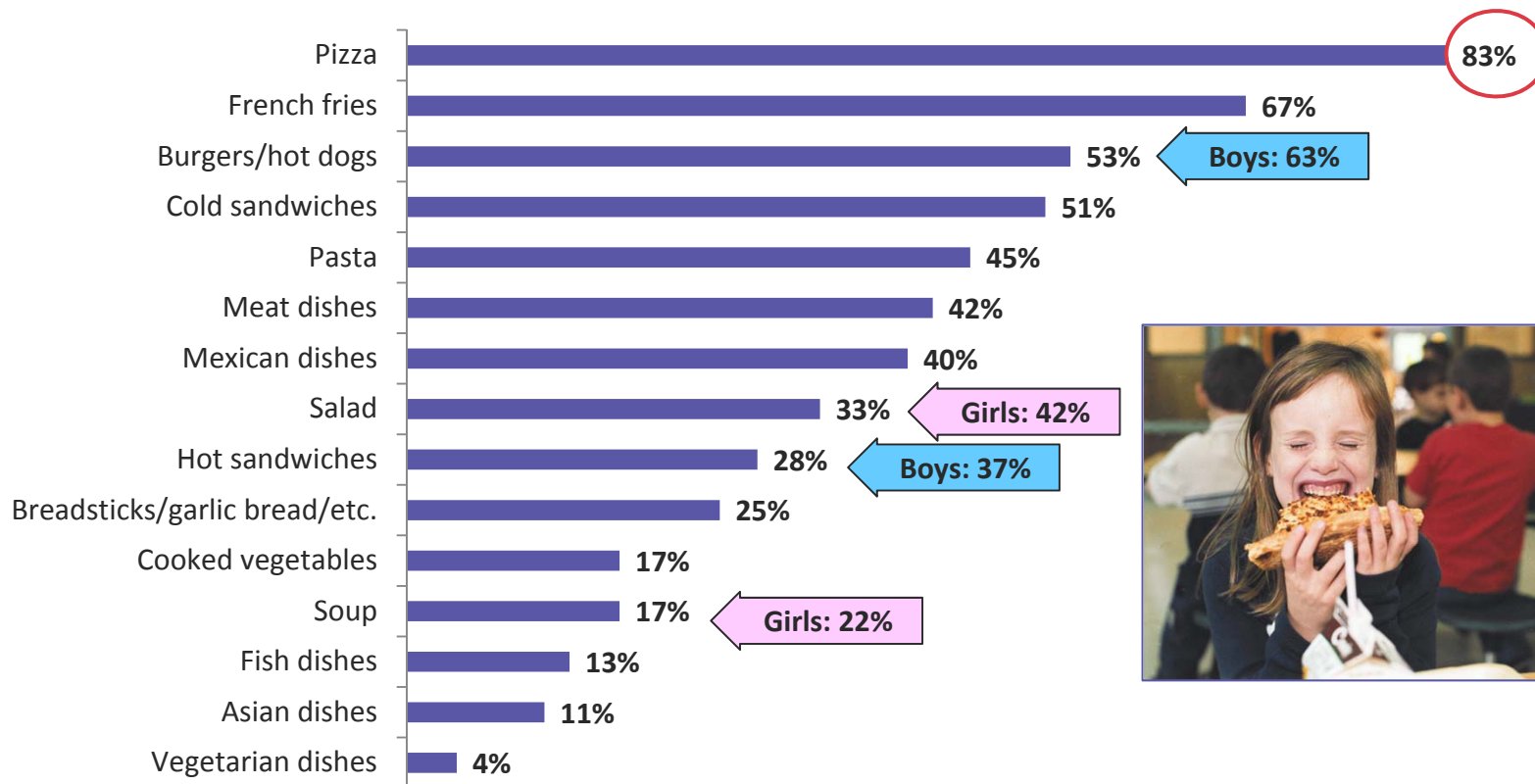
**Popularity of School Lunch Entrees**  
(All Kids: Mean Score and Standard Deviation)



Q11: For each type of food available at your school cafeteria, please rate from 1 to 10 how popular it is for kids at your school to get and eat during lunch, where 1 = “not popular at all” and 10 = “extremely popular.”

## Pizza Appears To Be The “Gold Standard” Of School Lunches

**Foods Chosen At School Lunch In Past Few Months**  
(All Kids: % Indicating)



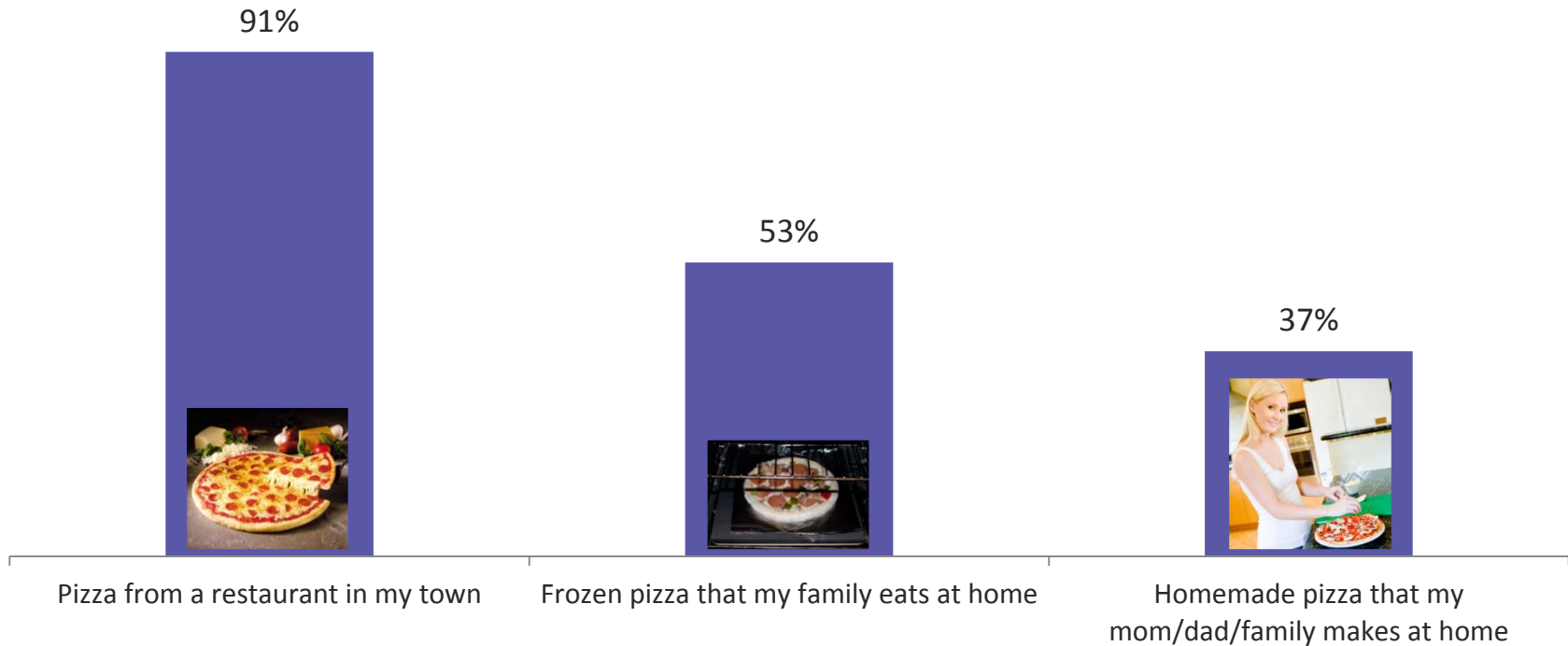
**Diving into the “school pizza experience” will provide some hypotheses as to why this may be...**

Q8: When you get meals at your school cafeteria, which types of foods do you choose?  
Please select the types of foods you have chosen at your cafeteria over the past few months.

*The Pizza Experience: In and Out of School*

**Most Kids Say They Have Eaten Pizza From A Restaurant In The Past Couple Of Months;  
About Half Have Eaten Frozen Pizza, And A Third Have Eaten Homemade Pizza**

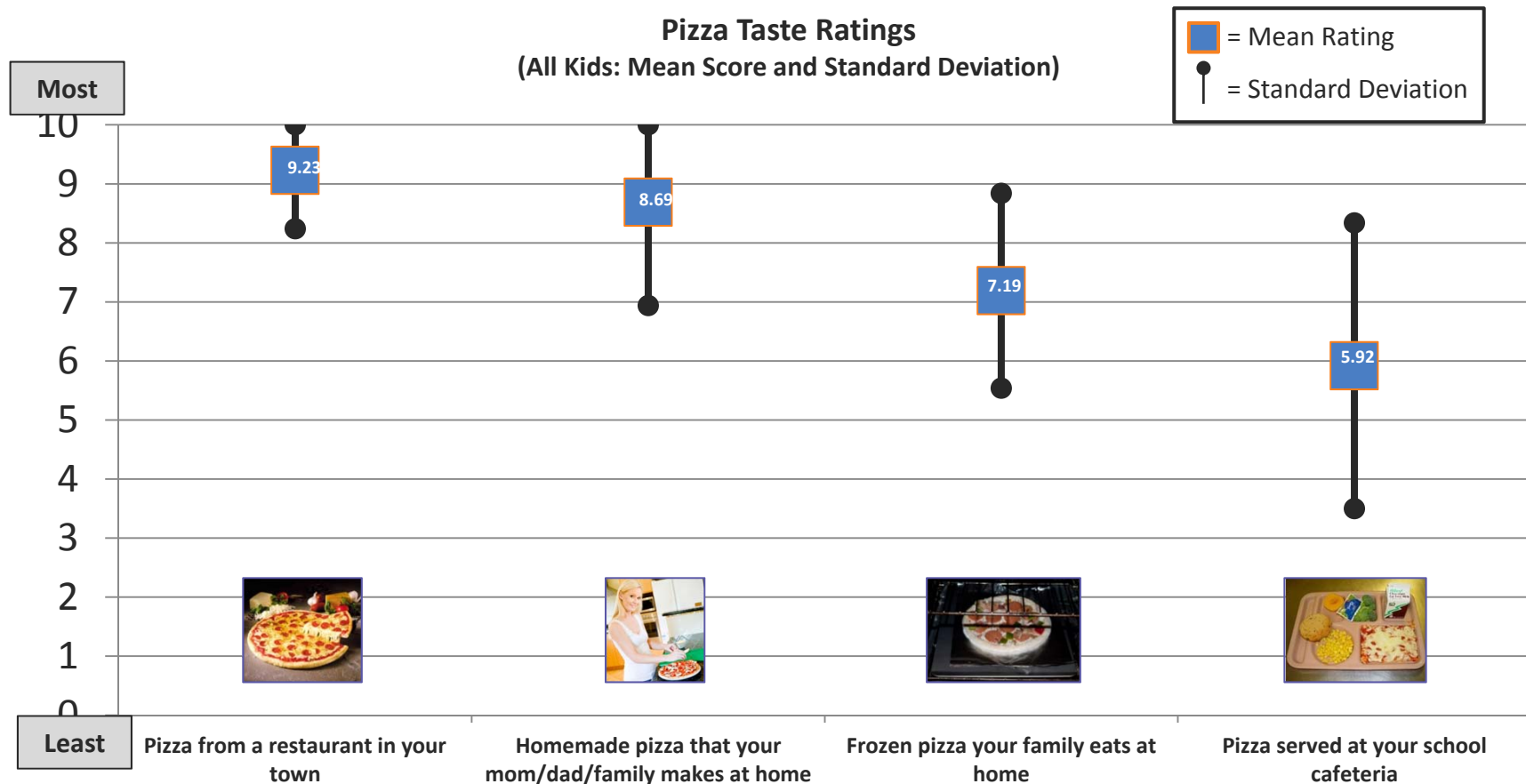
**Types of Pizza Kids Have Eaten in Past Two Months  
(All Kids: % Indicating)**



Q20: Which other types of pizza have you eaten in the past two months?

## Not Surprisingly, Restaurant Pizza Rated The Highest On Taste – And School Pizza Ranked Well Below The Other Types

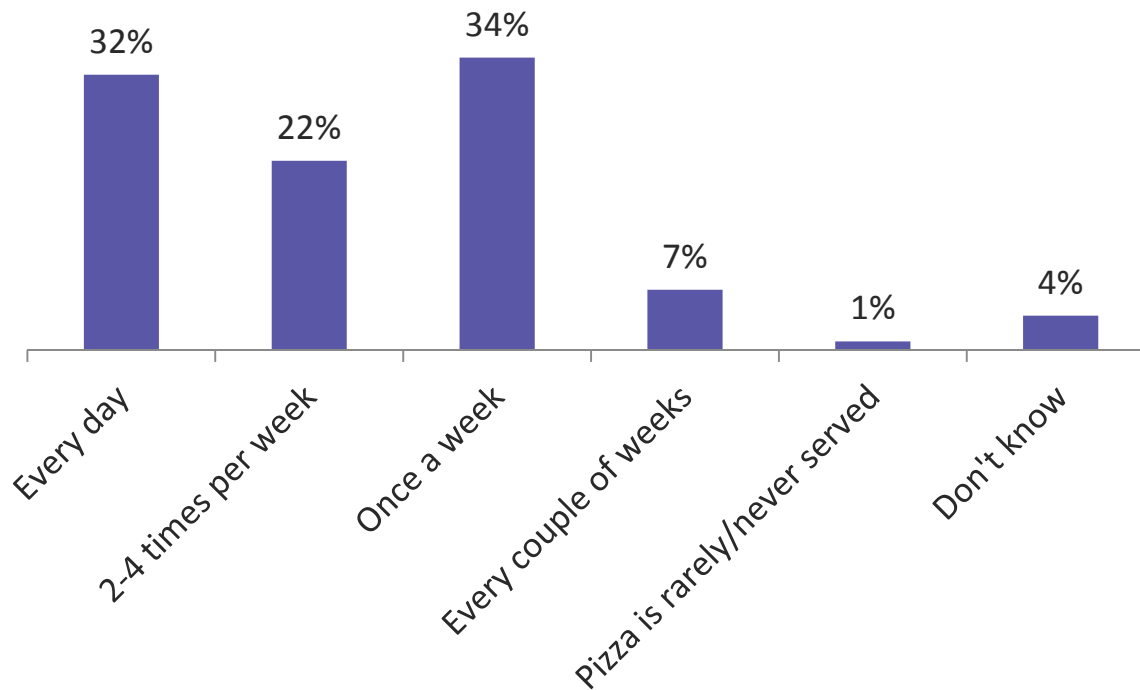
*It's interesting to note that while frozen pizza and school pizza are prepared similarly, kids find the taste of school pizza much less appealing*



Q21: Now we would like to understand how much you like the taste of different types of pizza. For each type of pizza below, please rate how much you like its taste on a scale of 1 to 10, where 1 = "really bad taste" and 10 = "really great taste."

**Nearly All Schools Serve Pizza At Least Once A Week, And Over Half Serve It Multiple Times Per Week – But 63% Of Kids Say They Get The Pizza Only “Occasionally” Or Less Often**

**Frequency of School Cafeterias Serving Pizza**  
(All Kids: % Indicating)



**Frequency of Getting School Pizza**  
(All Kids: % Indicating)

Frequency	%
Frequently	37%
Occasionally	43%
Rarely	13%
Never	7%

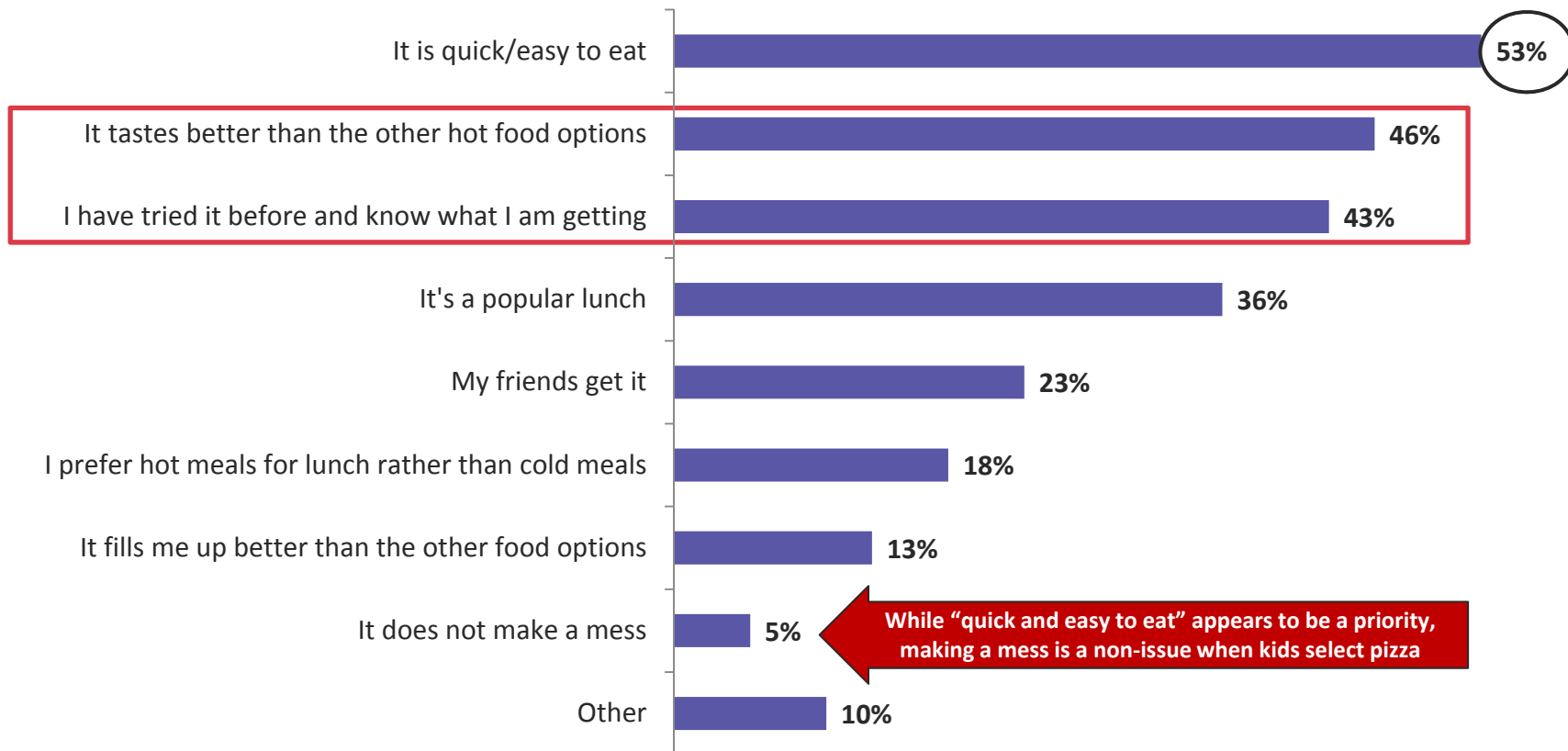
**Pizza may be the gold standard of school lunch because of the frequency at which it is served...**

Q12: How often does your school cafeteria serve pizza?

Q13: How often do you get the pizza at your school cafeteria?

## A Key Driver For Pizza Selection Appears To Be Convenience; However, Nearly Half of Kids Also Feel It Is A “Safe” Option...

**Reasons For Getting Pizza At School Cafeteria**  
(Kids Who Get Pizza Frequently/Occasionally: % Indicating)



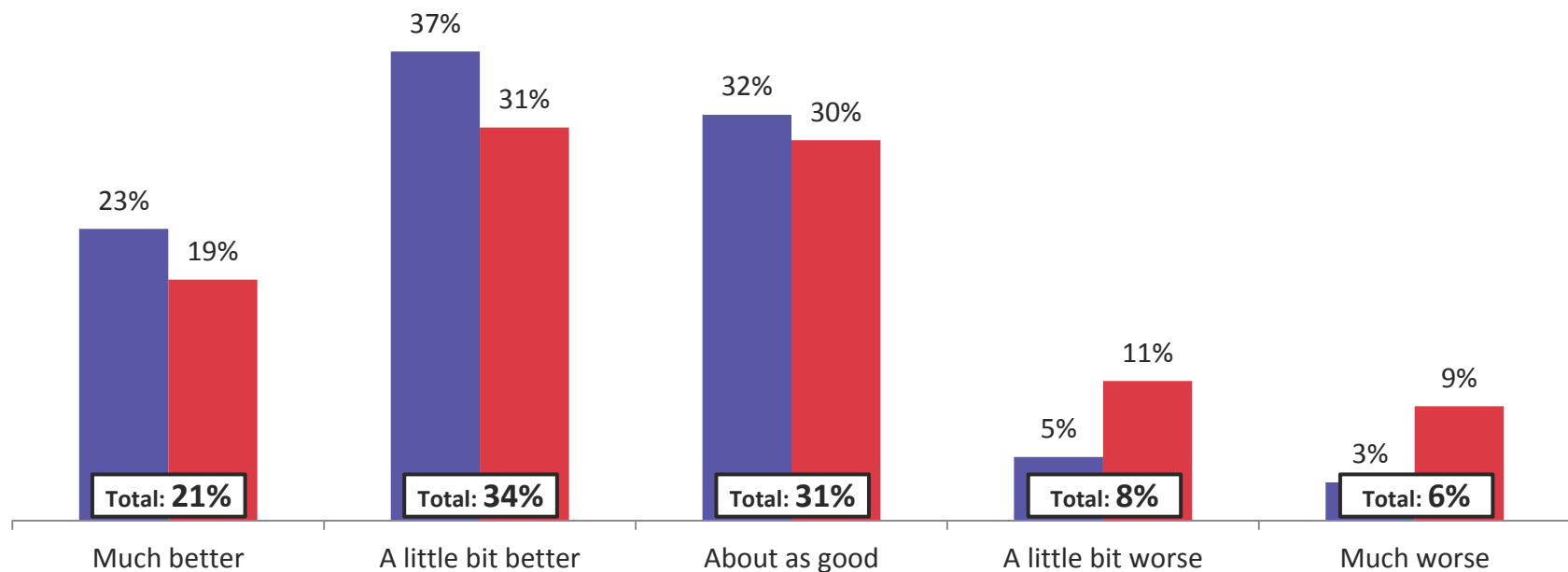
Q14: You said that you [frequently/occasionally] get the pizza at your school cafeteria. Please select the reasons why you get your school’s cafeteria pizza below.

## And Little Over Half Of Kids Say That Pizza Tastes Better Than The Other Foods Offered In Their School Cafeteria

*Among the group of kids that is not satisfied with hot lunch, the perception of pizza is slightly lower*

**“Compared To Other Foods At My School Cafeteria,  
The Pizza Tastes...”**  
(All Kids: % Indicating)

■ Kids satisfied with hot lunches at school    ■ Kids not satisfied with hot lunches at school



Q22: How would you say the taste of the pizza at your school cafeteria compares to the taste of other foods the cafeteria offers?

## In Digging Deeper, Many Said Pizza Was The Most Palatable Option Available That Day When Asked What They Generally “Liked” About Pizza

### *Cafeteria Pizza Is “The Best of the Bad”*

- Based on this feedback, it is no surprise that pizza is the “gold standard” in school lunch...
  - It is served frequently, but it is also the best viable option

*It's the best thing served at lunchtime.*

*It's not as rubbery and artificial as some other foods at my school.*

*It is always available as an option if I don't like the food for the day.*



*It's the best option we have.*

*I like that I know what it is, and even though it's not the best pizza, it's still okay to eat. Some of the pizzas are better than others.*

*For school pizza... it's not that bad!*

**While there were some kids who actually *did* like their school pizza because it tastes good – good sauce, cheese and crust – it appears that school pizza overall is not perceived as being all that great. It is important to note that the large number of kids who select pizza for lunch may not be choosing it because they like the way it tastes, but because it's the best viable lunch option.**

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## Looking At The School Nutrition Directors Survey, There Appears To Be A Disconnect Between Their Perceptions and Students' Actual Satisfaction With School Pizza

- Interestingly, none of the Nutrition Directors surveyed think that students are “completely dissatisfied” with any of the pizza offerings at the schools in their districts
  - Only two directors (out of 55) think that their students are “somewhat dissatisfied” with any school pizza option
  
- The majority of directors believe that their students are satisfied with all types of pizza.
  - Frozen pizza (Top 2 Box Satisfaction: 89%)
  - Fresh delivered pizza (Top 2 Box: 100%)
  - Fresh assembled pizza (Top 2 Box: 97%)
  
- Of all the types of pizza offered, it seems that frozen pizza is the option out of the three available that Nutrition Directors seem to think could use improvement
  - Only 38% state that their students are “completely satisfied” with frozen pizza (51% are “somewhat satisfied”)

Source: ADADC School Nutrition Directors Survey, Survey Monkey, Summer 2011

Note: Findings from the School Nutrition Director's Survey is directional due to small sample size.

## And This Disconnect Could Be Driven By Students' Frequent Purchase Of Pizza... Which We Now Know To Be Considered "The Best Of The Bad"

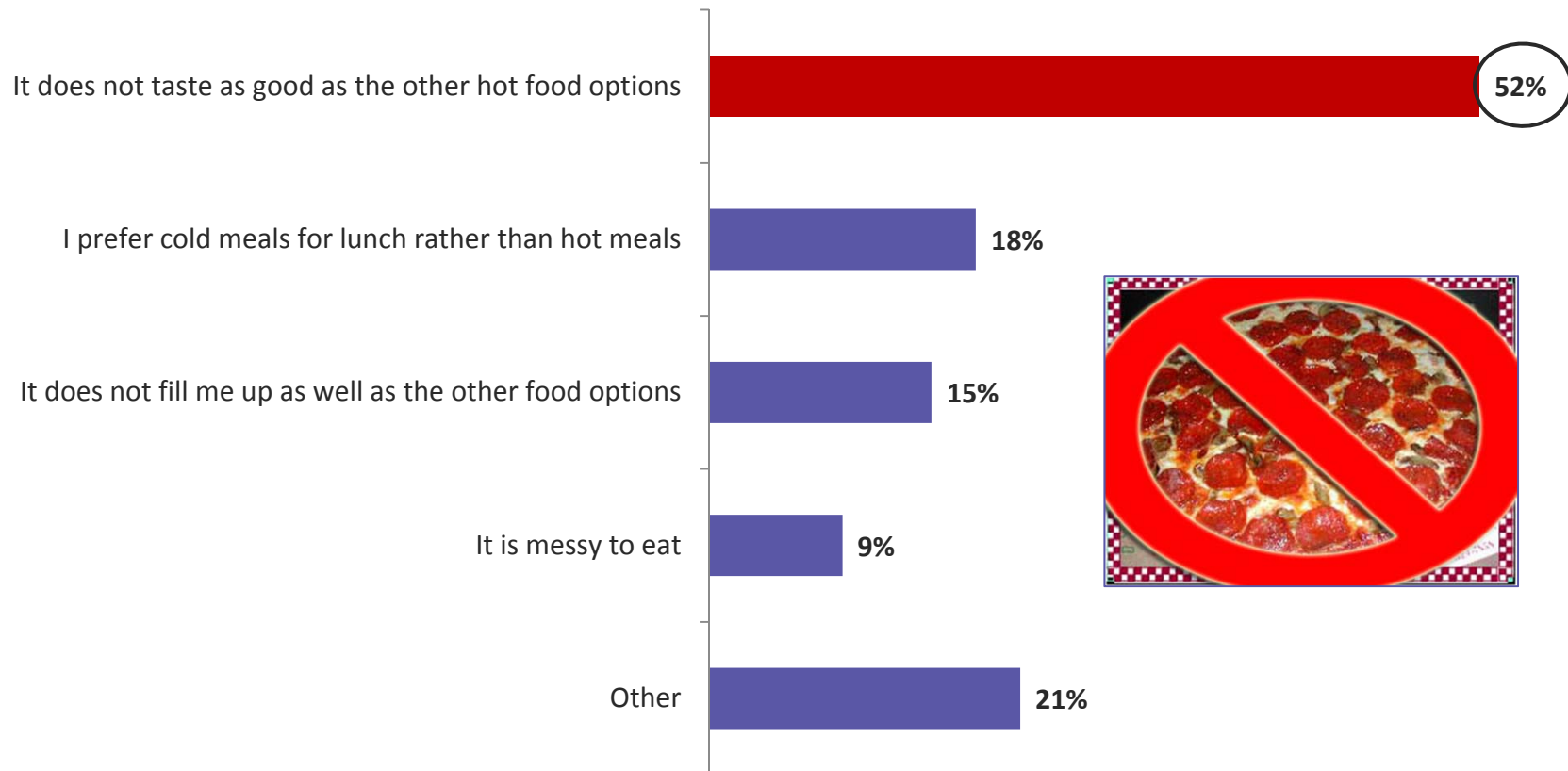
- The majority of students say that they are "somewhat satisfied" with school pizza; however, more students indicate dissatisfaction than Nutrition Directors surveyed seem to think is the case.
- While students seem to choose pizza more often than any other option, they have indicated that they do so because pizza is the "best of the bad" – pizza is considered the most viable school lunch option when compared with other hot lunch choices



**This may certainly be driving the disconnect between the surveyed Nutrition Directors and Students – students purchase pizza because it's the most palatable option to choose at lunchtime and Nutrition Directors likely read that as being a stronger *satisfaction* with pizza than actually exists.**

**We Only Had A Small Sample Of Kids Who Rarely/Never Ate School Pizza – But Among That Group, Taste Was The Primary Barrier To Selecting Pizza**

**Reasons For Not Getting Pizza At School Cafeteria**  
 (Kids Who Get Pizza Rarely/Never (But Have Tried The Pizza): % Indicating)



\* Note small sample: n=33

Q14: You said that you [frequently/occasionally] get the pizza at your school cafeteria. Please select the reasons why you get your school's cafeteria pizza below.

## Kids Who Don't Get Pizza At School Say That Taste Is The Biggest Reason, Followed By Low Quality Or Poor Preparation

*Taste also plays a role in kids saying that they'll just get pizza somewhere else, or that they prefer other meal options*



### Doesn't Taste Good

- "It tastes bad."
- "I don't like the taste that much."



### Bad Quality/ Bad Prep

- "The pizza seems fake – like fake sauce, fake cheese... it just doesn't taste good to me."
- "It's gross because it's not cooked."
- "The cheese tastes like rubber."
- "It's very oily..."



### Can Get Pizza Elsewhere

- "My mother orders pizza every other week at home."
- "It doesn't taste very good. I'd rather buy it at the pizza shop."
- "I like the other stuff better, and I can get pizza at home."



### Too Small/Not Filling Enough

- "It's too small and does not fill me up."
- "It does not come with a vegetable, so it's just not enough food."



### Prefer Other Meal Options

- "I like other cold meals, like wraps, and I don't think the pizza looks or tastes good."
- "I like peanut butter and jelly better."
- "I like sandwiches such as peanut butter and jelly better than pizza."

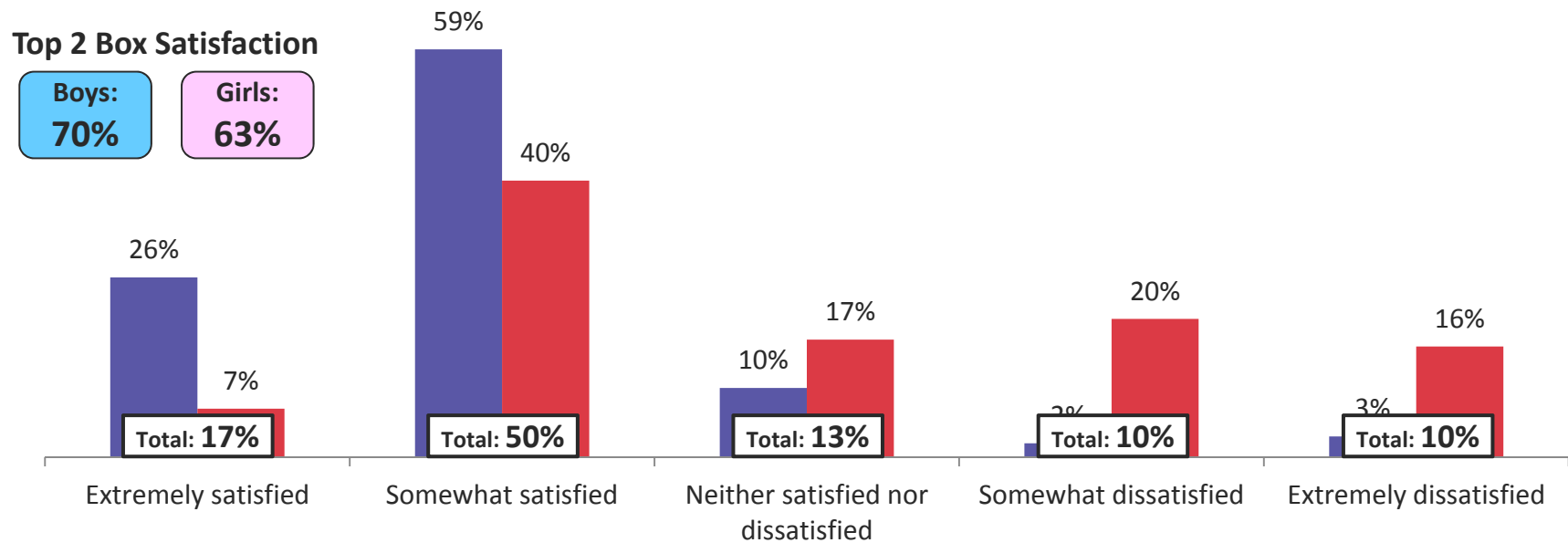
**Improving on taste, quality and preparation can potentially convert this group of kids into school pizza eaters.**

**Overall, Only 17% Of Kids Say That They Are “Extremely Satisfied” With School Pizza Which Suggests That There Is Room For Improving The Taste Profile...**

*Among the group of kids that is not satisfied with hot lunch, the satisfaction rate with pizza is only 47%*

**Satisfaction With School Pizza**  
(All Kids: % Indicating)

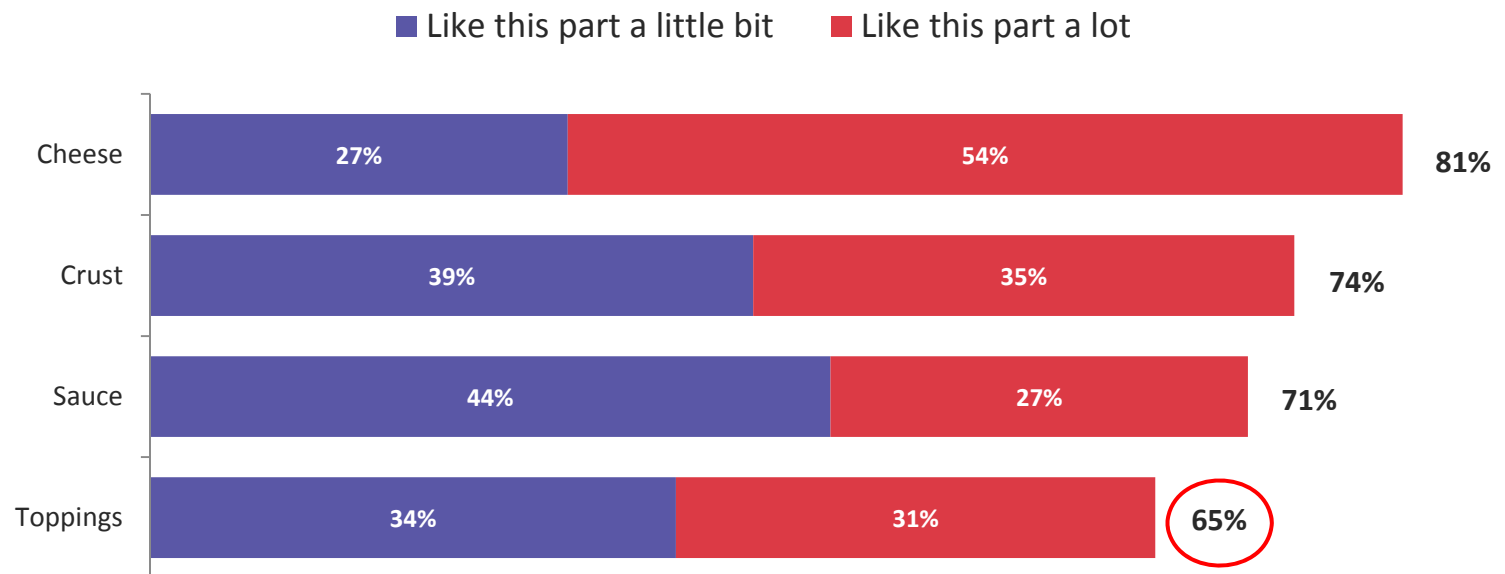
■ Kids satisfied with hot lunches at school    ■ Kids not satisfied with hot lunches at school



Q19: Overall, how satisfied would you say you are with the pizza served in your school’s cafeteria?

## Generally, Kids Rated All Parts Of The Pizza Fairly Positively – But Said That The Toppings Tended To Be The Weakest Part Overall

Likeability of All Parts of School Pizza  
(All Kids: % Indicating)



*It's always the same choices. There aren't any toppings – it's always plain cheese or pepperoni, and I don't like pepperoni. They don't offer thin crust and I like thin crust.*

Q18: Please think carefully about each part of the pizza served in your school's cafeteria: the crust, the sauce, the cheese, and the toppings. Please tell us how much you like each part.

## Kids Pointed To Better-Tasting Sauce, Customization, Freshness, And Better-Tasting Crust As Key Ways to Improve School Pizza

### Ways To Improve School Pizza (All Kids: % Indicating)

Ways to Improve School Pizza (Responses selected by 10% of kids or more)	%
Larger slices	39%
Better tasting sauce	33%
Customizable	33%
Fresher	31%
Better tasting crust	31%
More choices of toppings	29%
Higher quality ingredients	27%
Better tasting cheese	24%
More cheese	24%
Better tasting toppings	21%
Thicker crust	17%
Higher temperature	14%
Healthier	13%
Less sauce	12%
Thinner crust	11%

Ways to Improve School Pizza (Responses selected by less than 10% of kids)	%
Cooked for more time	9%
More sauce	9%
Softer texture	9%
Different shape of pizza/slices	8%
Cooked for less time	7%
Firmer texture	6%
Lower temperature	2%
Less cheese	2%
Smaller slices	0%
Other	4%

The pizza does not need to be improved – I like it the way it is.

8%

Key ways to improve pizza are not really around cheese – kids seem to want larger slices, but also fresher, and better tasting ingredients. Additionally, it’s about the “experience.” They are looking for more “control” over the menu with a desire for something “customizable.” This could also help to satisfy their need for variety which will keep pizza exciting for them.

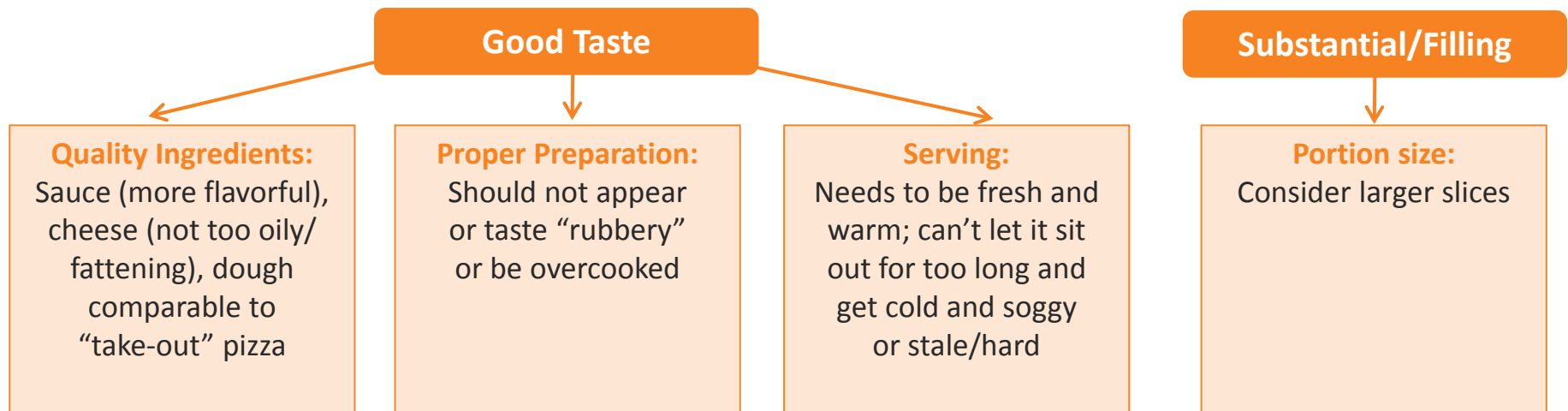
Q24: In what ways, if any, do you think the pizza in your school cafeteria could be improved?

## *Implications & Recommendations*

## There Is Certainly An Opportunity To Improve the Taste Profile of School Pizza...

- For some kids, they seem to have low expectations for school pizza because their view on cafeteria food *overall* is quite low
- With that, their perception of pizza seems to be that it's "the best of the bad" – they select it and eat it on occasion, but only because it's their best option comparatively that day

### Ways To Improve Tween/Teen Satisfaction...



If school cafeterias improve the basic taste profile of pizza, it can perhaps be chosen more often than it already is.

## Considering Timeless Needs (And How They Manifest During Lunchtime) Can Also Help to Improve the Pizza-Eating *Experience* In School...

➤ Tweens/teens seek more independence and allowing for “choice” can achieve this:

- Customizable pizza provides variety, but also allows kids to **“have it their way”**
  - Voting on toppings they’d like to have at the end of each week for next week’s menu?
  - Voting on a pizza of the week in addition to plain cheese to keep things interesting and exciting?
  - Asking kids how they want it? (e.g. toppings prepared separately which Food Service can add on top per kid request)

Ways to Improve School Pizza (Responses selected by 10% of kids or more)	%
Larger slices	39%
Better tasting sauce	33%
Customizable	33%
Fresher	31%



➤ Tweens/teens yearn to be in control and are looking to be empowered; providing options that allow kids to **“create their own”** can achieve this:

- Innovative ways to deliver variety that encourage “kid preparation”
  - Preparing toppings separately which can be “added” to basic cheese pizza? (e.g. toppings station)
- Empower kids by allowing them to “pre-order”
  - Replicating the “take out” or restaurant experience which is inherently social? (e.g. 10 friends can pre-order a rectangular pizza to share)



Additionally, Considering Timeless Needs (And How They Manifest During Lunchtime) Can Also Help to Improve the Pizza-Eating *Experience* In School...



- Tweens/teens seek ways to “give back”:
  - Options that allow kids to feel that they too can **make a difference or an impact on the world in which they live:**
    - Can a portion of pizza sales go towards school fundraising (e.g. academics, athletics, performing arts, etc.)? Or a school-supported charity (e.g. one tied to childhood hunger or similar)? Or something we know kids feel passionate about (e.g. animals, the environment, etc.)

Thank You!

Questions?



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