

NAVIGATING THE TENNESSEE FARMSTEAD MILK LANDSCAPE: GENERATIONAL PERSPECTIVES ON CONSUMER PREFERENCES, PURCHASE LOCATIONS, AND AWARENESS CHANNELS

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Background and Purpose

Understanding and adapting to customers' diverse demographics and preferences is vital for the success of any company. One key aspect is acknowledging and catering to different generations' distinct characteristics, buying behaviors, and needs. By recognizing these differences, farmstead dairy producers, or those who process their raw milk into bottled milk sold directly to consumers as farmstead milk (FSM), can effectively tailor their marketing strategies to specific age groups. A recent survey of 817 Tennessee (TN) residents offers a detailed look at consumption patterns, buying habits and preferences for FSM across generations. This article outlines insights into how different age brackets or generations — Generation Z (born between 1997-2012), Millennials (born between 1981-1996), Generation X (born between 1965-1980), Baby Boomers (born between 1946-1964) and the Silent Generation (born between 1928-1945) (Dimcock, 2019) — interact with and perceive farmstead dairy products in Tennessee. This article will provide insights into how the different generations source information about FSM, where they have discovered and purchased these products, and where they would be willing to buy them.

Engaging with the right audience is critical for success in farmstead dairies. The dairy industry has seen a shift in consumer preferences, especially across generations (Perry and Brown, 2021; Legreid, 2022). Understanding these differences and matching marketing strategies may be helpful for farmstead dairy businesses. Generations exhibit different consumption habits, lifestyle choices and communication preferences. Consequently, more than a one-size-fits-all marketing approach may be needed. Tailoring marketing efforts to align with each generation's tastes, values and buying behaviors becomes paramount. Furthermore, the choice of marketing channels is equally important. With the digital age in full swing, farmstead dairies must be able to navigate various platforms — social media, e-commerce portals, traditional advertising or personalized outreach. Selecting the proper channels that resonate with each generation ensures broader visibility and enhances the chances of forging meaningful connections that can be the difference between a one-time purchaser and a repeat customer. An omnichannel approach of offline and online media, tailored to each generation's preferences, may amplify a farmstead dairy's reach and foster a sense of authenticity and relatability that's pivotal in today's competitive market.

Several differences have been noted across the generations. For instance, businesses may appeal to the Silent Generation and Baby Boomers with nostalgic storytelling and product quality assurance through traditional media and text-rich internet sites (Williams and Page, 2011). However, Millennials have the largest spending power (Hamel, Fenz, and Hofer, 2018) and spend a larger portion of their income on food (University of South Carolina, 2023), making them an attractive customer segment to target. Millennials prefer to be engaged through digital platforms and magazines using visual narratives (Williams and Page, 2011). Conversely, Generation X prefers a balance of traditional media, direct mail and internet sites (Williams and Page, 2011; Kowalewicz, 2021). Lastly, Gen Z prefers diverse marketing through social media but is also label-conscious (Corbett, 2023). Compared with their counterparts, Gen Z prefers marketing through images and videos (Djafarova and Bowes, 2021). Each study highlights generational differences that may be used to tailor marketing efforts of farmstead dairy products to attract these audiences. The results presented here address generational differences and can be used by dairy farmers and industry clientele interested in marketing their goods directly to the consumer through various channels.

Comparison of the Survey Demographics within Tennessee’s Population

This study consisted of 817 (N = 817) Tennessee (TN) residents who responded to an online survey. For information from this survey to be applied to all TN consumers, our sample had to reflect the characteristics of TN’s food purchasing population (U.S. Census Bureau, 2023). Our sample was older than the TN population by 10 years (49 years versus 39 years; n = 817), reflecting the exclusion of people less than 18 years old in the study. The amount female was 62 percent, whereas the TN population was 51 percent female (n = 813). This larger percentage is due to our screening procedure that requires respondents to be at least equally responsible for food shopping within the household. Research shows that a higher percentage of primary food shoppers are female (Schaefer, 2019). Our sample consisted of 40 percent college-educated participants with a bachelor’s degree or higher versus the state population of 29.7 percent having a bachelor’s degree or higher (n = 814). An explanation for this variance could be sample bias since our survey was taken online only (Keeter and McGeeney, 2015), which may have increased the number of people participating who are technology savvy and have access to the internet. Our household size was slightly higher at 3.5 people per household versus the state average of 2.5 people per household (n = 812). The median household income of the survey respondents was lower at \$59,229 versus \$64,035 for the population (n=765).

Demographic Differences Among Three Generational Groups

Respondents were grouped into generation categories based on their age at the time of the survey (April to May 2021). The groups were: Generation Z (GenZ; 18-24 years; n = 73), Millennials (25-40 years; n = 214), Generation X (GenX; 41-56 years; n = 224), Baby Boomers (57-75 years; n = 276) and the Silent Generation (Silent Gen; 76-96 years; n = 30) (Dimcock, 2019). These generations were then consolidated into three groups that were labeled based on the largest percentage within each group that are referenced throughout this paper:

- Millennials (Gen Z and Millennials; n = 287)
- GenX (n = 224)
- Baby Boomers (Baby Boomers and Silent Gen; n = 306)

Millennials make up 35.1 percent of our sample, GenX makes up 27.4 percent, and Baby Boomers make up the last 37.5 percent. In comparison, the Tennessee population 18 years of age and older is made up of 34.4 percent Millennials, 23.8 percent GenX, and 41.8 percent Baby Boomers (U.S. Census Bureau, 2024). Our sample slightly underrepresents Baby Boomers, while slightly overrepresenting GenX.

Table 1: Group Differences in Demographics

	Definitions	Millennials (N = 287)	GenX (N = 224)	Baby Boomer (N = 306)
Household Size	Number per Household	3.3 ^a	2.8 ^b	2.1 ^c
Annual Household Income	\$ per year	55,300 ^a	67,400 ^b	57,000 ^a
Weekly Dairy Expenditure	\$ per week	12.6 ^a	10.5 ^b	8.9 ^b
Weekly Food Budget	\$ per week	144.70 ^a	129.20 ^a	103.20 ^b
Male	1 = Yes 0 = No	38% ^a	34% ^a	40% ^a
College Education	Bachelor’s Degree or Higher	37% ^a	45% ^a	39% ^a
Children < 12 Present	1 = Yes, 0 = No	41% ^a	26% ^b	0.4% ^c
Farm Background	1 = Yes, 0 = No	24% ^a	26% ^a	28% ^a
East TN Resident	1 = Yes, 0 = No	36% ^a	37% ^a	37% ^a
Middle TN Resident	1 = Yes, 0 = No	45% ^a	41% ^a	40% ^a
West TN Resident	1 = Yes, 0 = No	19% ^a	22% ^a	23% ^a
Age	Years	30.4 ^a	49.0 ^b	66.5 ^c
Caucasian	1 = Yes, 0 = No	76% ^a	82% ^a	91% ^b
Married	1 = Yes, 0 = No	42% ^a	62% ^b	57% ^b
Rural	1 = Yes, 0 = No	19% ^a	24% ^{ab}	32% ^b
Interested in purchasing FSM	1 = Yes, 0 = No	97% ^a	97% ^a	93% ^a
Have Heard Of FSM	1 = Yes, 0 = No	59% ^a	45% ^b	31% ^c
Have Purchased FSM	1 = Yes, 0 = No	47% ^a	33% ^b	19% ^c
Propensity for Purchasing Local	1 = not at all likely, ..., 5 = a great deal	3.1 ^a	2.9 ^{ab}	2.9 ^b

***Analysis of Variance (ANOVA) with Tukey’s post-hoc test: means with different superscripts are significantly different at .05.*

Survey responses were compared across the three generational groups (Table 1). The household size was distinctly different among the three groups, with the household size decreasing as age increased. This result is mainly explained by Millennials having younger children in the house and GenX having older children with fewer still living at home (i.e., “empty nesters”). Baby Boomers resided primarily with their spouses, partners or a single caregiver, and only 0.4 percent had children under 12 years in the house. GenX had a significantly greater household income than their younger and older counterparts. Millennials budgeted significantly greater amounts towards dairy product purchases per week than their older counterparts. This may be because they feed more people and children among these individuals, where nutrients provided by dairy products are essential for growth (Herber et al., 2020).

Similarly, the overall food budget was greater for Millennials than for Baby Boomers. However, it was not statistically different than that for GenX. This result might be explained because GenX had a higher income; thus, more could be spent on food. There was no difference in college education or farm background among the groups. Both results are surprising, considering other reports show younger generations — driven by Millennials — have a higher percentage with a bachelor’s degree or beyond (Pew Research Center, 2019) and that the average American is at least three generations removed from the farm (Pozderac and Stammen, 2019). For Tennessee, it could be as high as five or six generations removed from the farm (Tennessee Farm Bureau, 2019). This statistic might explain why we often hear that younger generations are “less connected” to the agricultural industry. Respondents were equally distributed between East, Middle, and West TN. Millennials lived in more urban areas than Baby Boomers. Fewer Millennials were married compared to their older counterparts, but this may be partly explained because the average marital age has increased (Pew Research Center, 2020). The three groups were equally likely to be interested in purchasing FSM in the future. Interestingly, as the generational groups increased in age, respondents were less likely to have previously heard of and purchased FSM. Of those who had heard of FSM before, 79 percent of Millennials had purchased FSM, which was statistically different from the 73 percent of GenX, and the 61 percent of Baby Boomers. Finally, Millennials tend to buy local foods more frequently than Baby Boomers.

Dairy Consumption

Product purchase frequency was impacted by generation for whole milk, low-fat milk, skim milk, sour cream, butter, ice cream and flavored milk (Table 2). Millennials purchased whole milk more frequently than GenX or Baby Boomers, possibly because Millennials are the current generation with young children. GenX purchased whole milk more frequently than Baby Boomers. Millennials bought low-fat milk less frequently than GenX but at the same rate as Baby Boomers. Low-fat milk purchase frequency was statistically the same between GenX and Baby Boomers. Skim milk purchase frequency was greater for GenX than for Baby Boomers. Millennials purchased sour cream more frequently than Baby Boomers. Baby Boomers bought sour cream more regularly than GenX. Butter and ice cream were purchased more frequently by Millennials than by Baby Boomers. Finally, younger generations purchased flavored milk more frequently than the older generations.

Table 2. How Often Dairy Products are Purchased Yearly

	Overall (n=817)	Millennials (N = 287)	GenX (N = 224)	Baby Boomer (N = 306)
Whole Milk	19.94	25.34 ^a	19.59 ^b	15.13 ^c
Low-fat Milk	21.09	19.00 ^a	23.36 ^b	21.40 ^{ab}
Skim Milk	8.03	8.69 ^{ab}	9.90 ^a	6.03 ^b
Sour Cream	15.64	17.74 ^a	16.60 ^a	12.96 ^b
Butter	21.55	24.76 ^a	21.47 ^{ab}	18.59 ^b
Ice Cream	21.39	23.21 ^a	22.32 ^{ab}	19.01 ^b
Flavored Milk	10.30	15.49 ^a	10.43 ^b	5.34 ^c
Yogurt	22.22	21.83 ^a	23.51 ^a	21.64 ^a

***Analysis of Variance (ANOVA) with Tukey’s post-hoc test: means with different superscripts are significantly different at .05.*

Table 3 shows the percentage of each group that purchased each dairy product¹ more than one time per year. Butter and ice cream were the two products purchased by most consumers. Skim milk was purchased by the fewest respondents and in the smallest quantity. Low-fat milk was the most frequently purchased type of milk. Most respondents bought butter and ice cream, and the least number of respondents purchased skim milk. Most Baby Boomers and GenX purchased low-fat milk, but Millennials had the highest percentage buying whole milk. By quantity, however, Millennials purchased skim milk less frequently and whole milk more often. GenX bought yogurt and low-fat milk most frequently but bought skim milk less frequently. Baby Boomers purchased low-fat milk the most, flavored milk the least, and yogurt was their most frequent purchase.

Table 3. Percent of Tennessee Consumers that Purchase Dairy Products At Least Once a Year

	Millennials (n = 287)	GenX (n = 224)	Baby Boomer (n = 306)	Total (n = 817)
Whole Milk	79%	68%	61%	69%
Low-fat Milk	71%	77%	75%	74%
Skim Milk	44%	43%	32%	39%
Sour Cream	87%	89%	87%	88%
Butter	99%	98%	97%	98%
Ice Cream	97%	97%	97%	97%
Flavored Milk	70%	64%	45%	59%
Yogurt	87%	91%	85%	87%

² Respondents were not asked how often they purchased cheese.

Farmstead Dairy Product Awareness

Overall, 61 percent of respondents who had heard of FSM learned about the product from “other” sources — including restaurants, retail stores and word of mouth (Figure 1). The second most common information source was media (54 percent), including social media (Facebook, Twitter, Instagram, etc.), other media advertisements (TV, radio, newspaper, magazines), Pick TN Product web pages or print ads and roadside signs. The least common but not insignificant category, 49 percent, was farm sources, including farmers markets, farm stores and stands and directly from the farmer. The most common individual sources were farmers markets and word of mouth, followed by social media. The former result is unsurprising due to the popularity of farmers markets as a common form of direct-from-farm-to-consumer marketing (Dodds et al., 2014; Hu, Clarke, and Zendejdel, 2021). The latter results are also unsurprising given that 88 percent of consumers reported trusting their friends’ recommendations over traditional media sources (Hayes et al., 2022).

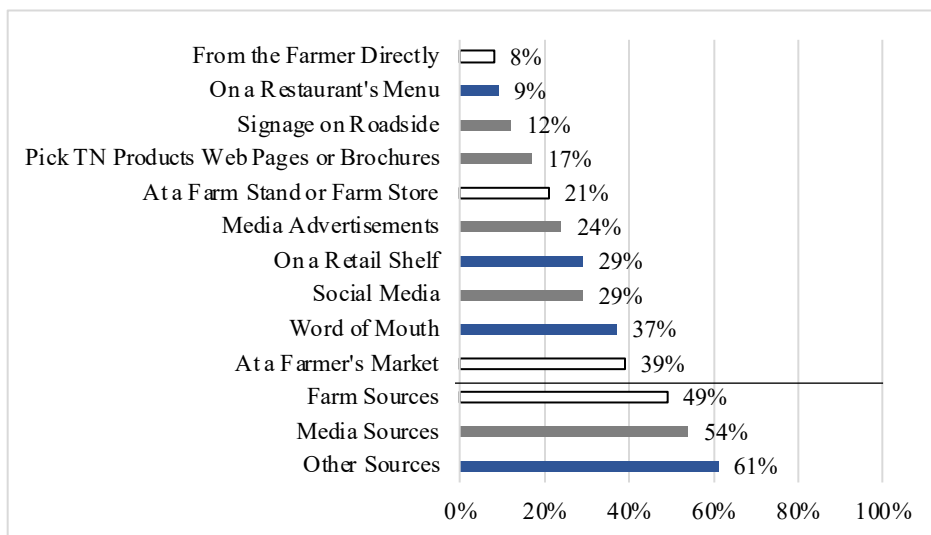


Figure 1.
Sources Tennessee Consumers Learned of Farmstead Milk or Dairy Products

Figure 2 shows the sources where TN consumers learned of FSM. Farm sources and media/ signage were the most common sources, but word-of-mouth also was common. Farm sources were among the top two sources of information across the generations. In addition to farm sources, Millennials preferred social media. In contrast, GenX and Baby Boomers preferred word-of-mouth. Figure 2a shows farm-related awareness channels, including farmers markets, farm stores and stands and direct from the farmer. No generational group was more likely to have learned of FSM from any farm source — meaning that overall, younger respondents were no more or less likely to have heard of FSM from any farm source than older respondents. However, the most common source to hear of FSM was through farmers markets (39 percent overall had heard of it), while the least common source was directly from the farmer (8 percent overall). This could be because while most people are out of touch with the farms themselves unless they know a dairy farmer personally, many attend

farmers markets for family outings and to meet the farmer, entertainment, or to seek fresh produce and other goods.

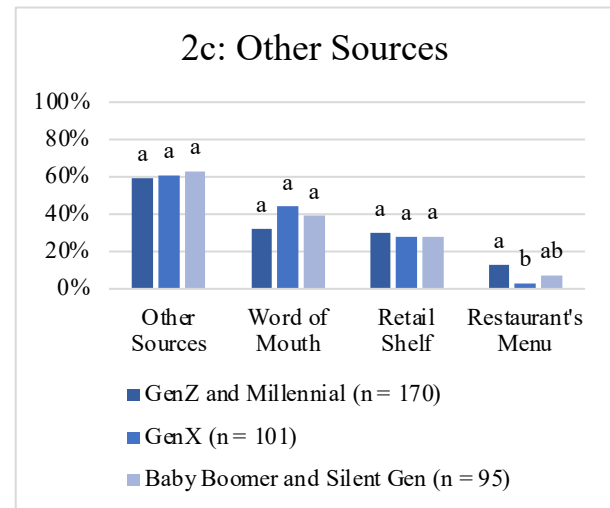
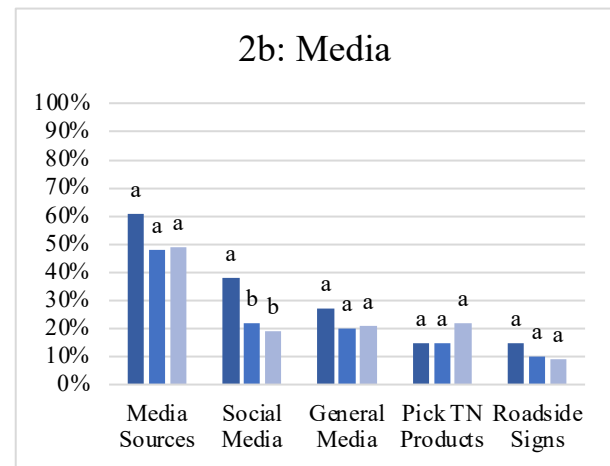
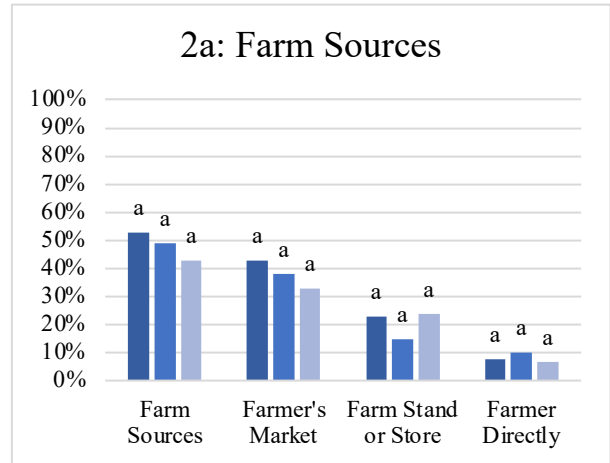
Figure 2b shows media-related awareness channels, including social media, TV, radio, print advertisements, Pick TN webpage advertisements and road signs. The only generational group difference was within social media (SM). Millennials were significantly more likely to have heard of FSM from social media channels than GenX or Baby Boomers. This result makes sense because the younger generations generally have a higher SM usage (Koçak et al., 2021).

Figure 2c shows other awareness channels, including word of mouth, retail shelves, and restaurant menus. Millennials were more likely to have heard of FSM from a restaurant's menu than GenX, likely due to their relatively large spending (\$243/month) on eating away from home (Talty, 2016). Across the three groups no differences were observed in word of mouth or retail shelves, likely because these are used by everyone regardless of generation.

Farmstead Dairy Products Purchase

The survey's focus was FSM, but respondents also selected additional farmstead dairy products they would purchase and where they would purchase them. In the survey, 76 percent of participants said they would probably or definitely purchase FSM, regardless of retailer. Listed below are the percentages of respondents who indicated they would buy various other farmstead products:

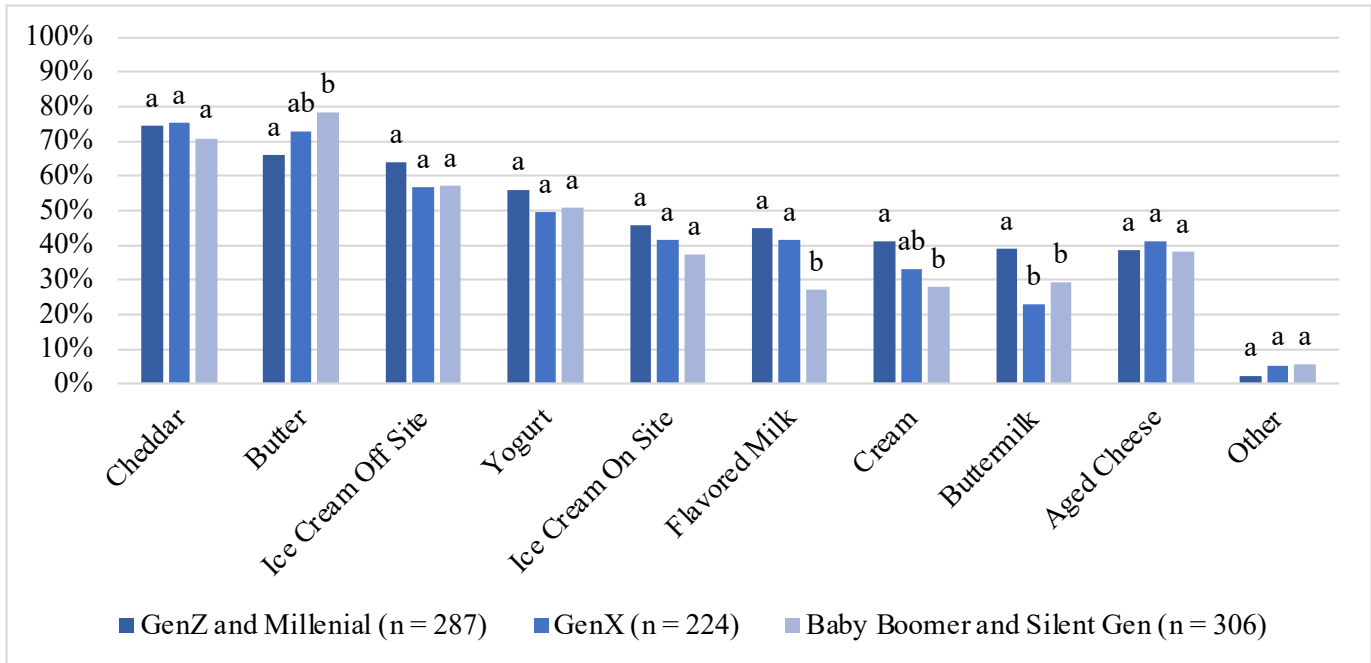
- Cheddars: 73 percent
- Butter: 72 percent
- Ice Cream: 69 percent
 - On-Site Consumption: 41 percent
 - Off-Site Consumption: 59 percent
- Yogurt: 52 percent
- Aged Cheese: 39 percent
- Flavored Milk: 37 percent
- Cream: 34 percent
- Buttermilk: 31 percent
- Other : 4 percent



Note: Analysis of Variance (ANOVA) with Tukey's post-hoc test: means with different superscripts are significantly different at .05.

Figure 3 shows the percentage of people who would purchase each of these products by generation. The top three products among Millennials and GenX were cheddar cheese, butter and ice cream for off-site consumption. Baby Boomers preferred butter slightly more than cheddars but still ranked ice cream as their third most desired product for off-site consumption. Among each product individually, Millennials (66 percent) were seen to desire butter significantly less than Baby Boomers (78 percent). Flavored milk, cream and buttermilk were the other products where generation impacted purchase likelihood. Millennials and GenX preferred flavored milk more than Baby Boomers, suggesting that using marketing to target individuals less than 57 years old could be beneficial if selling flavored milk. Millennials were more willing to purchase cream and buttermilk than the Baby Boomers. Additionally, Millennials had a higher percentage willing to purchase buttermilk than GenX, but GenX and Baby Boomers were not significantly different.

Figure 3: Generational Differences in Tennessee Consumers Who Would Purchase Farmstead Milk or Dairy Products Purchases Regardless of Purchase of Consumption Location



Note: Analysis of Variance (ANOVA) with Tukey's post-hoc test: means with different superscripts are significantly different at .05.

³The "other" category included cottage cheese, cheese curds, fudge, baked goods, half and half, coffee creamers, sour cream, and frozen yogurt.

Figure 4. Comparison of Where Tennessee Consumers Would Purchase Various Dairy Products

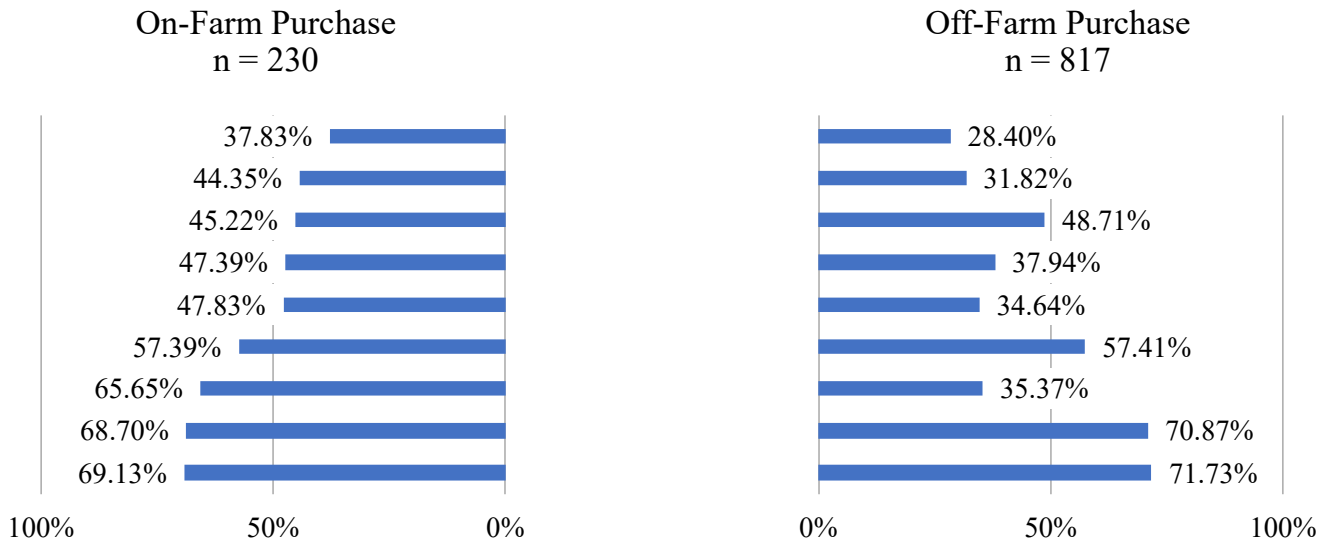
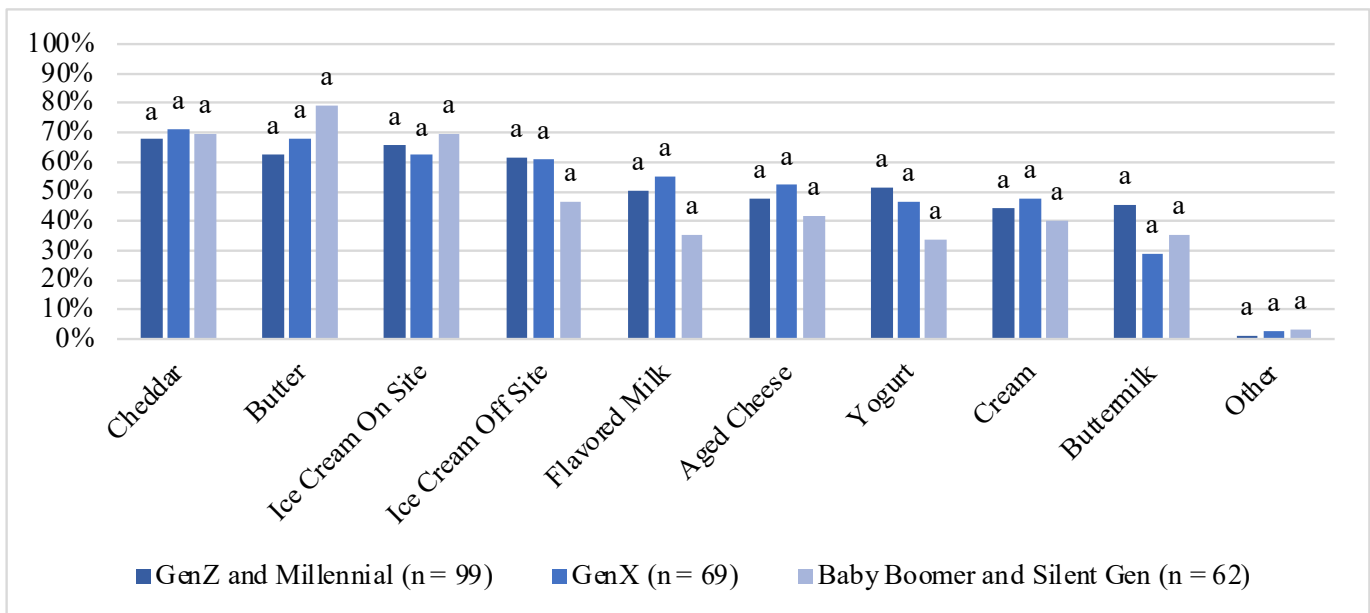


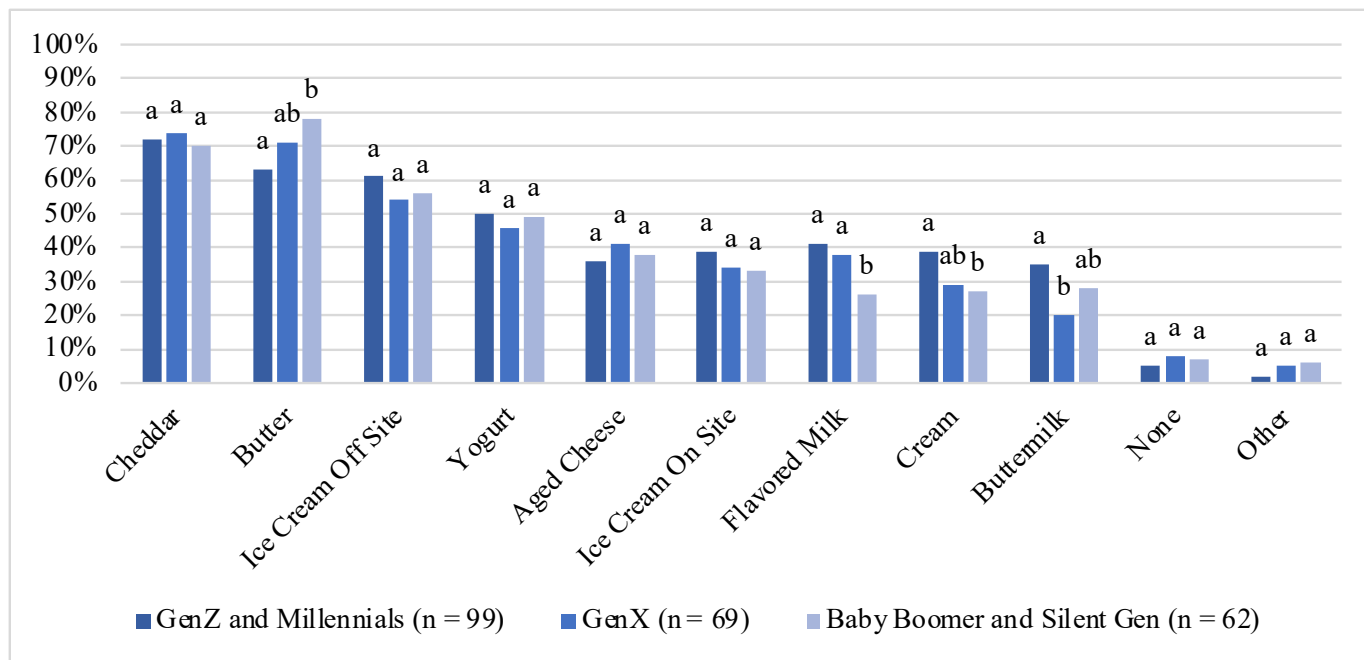
Figure 4 shows a comparison of what products respondents would purchase on-farm and at off-farm locations. Only participants who indicated they would be willing to visit a dairy farm (28 percent) were asked to indicate what products they would purchase on-farm. Figure 5 shows the products that each generation would buy on-farm. No statistical differences were seen, meaning that each generation was equally likely to purchase farmstead dairy products as a part of a dairy farm visit. All participants were asked what products they would purchase at off-farm locations (Figure 6). If purchased off-farm, the different generations displayed similar purchase behaviors for cheeses, ice cream for on- or off-site consumption, and yogurts. However, GenZ/Millennials were less likely to purchase butter than Baby Boomers, while being more likely to purchase cream than Baby Boomers and more likely to purchase buttermilk than GenX. Flavored milk was more likely to be purchased by Millennials than Baby Boomers and more likely to be purchased by GenX than Baby Boomers.

Figure 5. On-farm Product Purchase Comparison by Generation



Note: Analysis of Variance (ANOVA) with Tukey's post-hoc test: means with different superscripts are significantly different at .05.

Figure 6. Off-farm Product Purchase Comparison by Generation



Note: Analysis of Variance (ANOVA) with Tukey’s post-hoc test: means with different superscripts are significantly different at .05.

Prior FSM Purchase Locations

Participants who had previously purchased FSM identified where they had made the purchase. The most common locations were grocery stores, farmers markets and big box stores (i.e., Walmart), while food cooperatives, online sources and home delivery services were the least common (Figure 7). Generational differences were noted (Figure 8). Millennials were more likely to purchase at farmers markets and big box stores than Baby Boomers; Millennials were also more likely to have purchased at convenience stores and specialty stores (i.e., ice cream shops or specialty cheese stores) than GenX. Finally, Millennials were more likely to have purchased online (i.e., internet sites or third-party marketing sites, such as Etsy or Amazon) than their counterparts.

Figure 7. Locations Tennessee Consumers Have Purchased Farmstead Milk (n = 211)

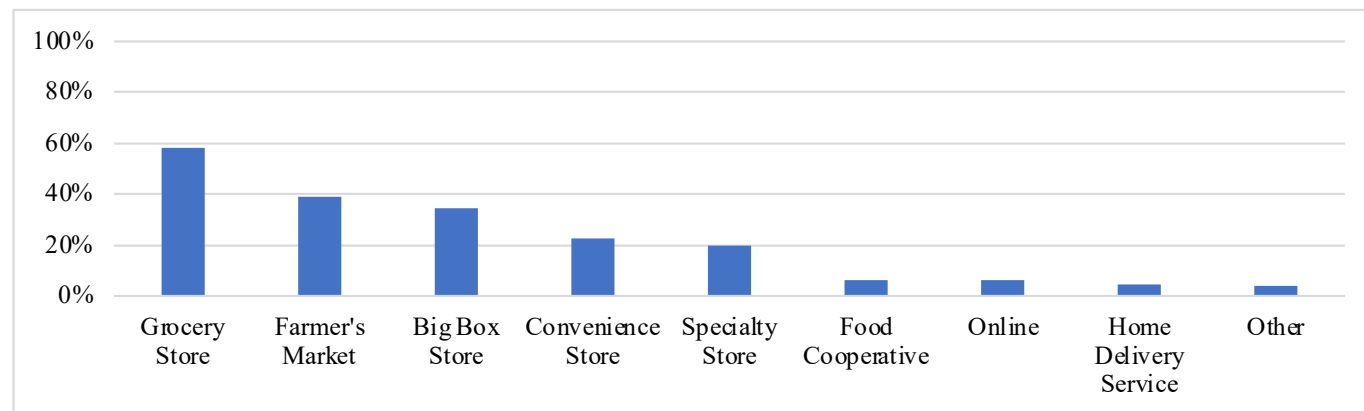
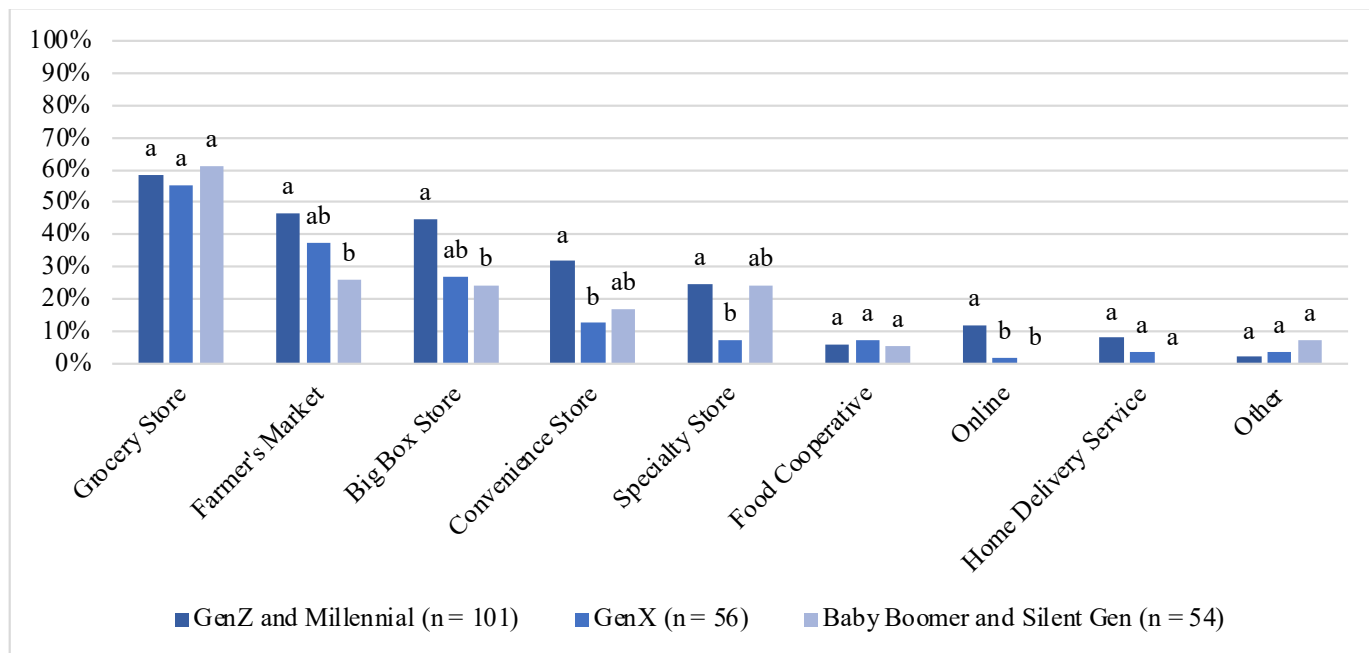


Figure 8. Generational Differences in Where Respondents Purchased Farmstead Milk Previously



Note: Analysis of Variance (ANOVA) with Tukey's post-hoc test: means with different superscripts are significantly different at 0.05.

Future FSM Purchase Locations

Participants identified their most desired purchase locations for future FSM purchases as grocery stores, big box stores and farmers markets, and their least desired locations were home delivery services, food cooperatives and online (Figure 9). Figure 10 is purchase locations broken down by generation. Millennials were less likely to purchase at a grocery store compared to GenX but more likely to buy at a farmers market, farm store, convenience store or specialty store than Baby Boomers. GenX was also more likely to purchase at a farmers market than Baby Boomers.

Figure 9. Locations Where Respondents Would Purchase Farmstead Dairy Products (n = 760)

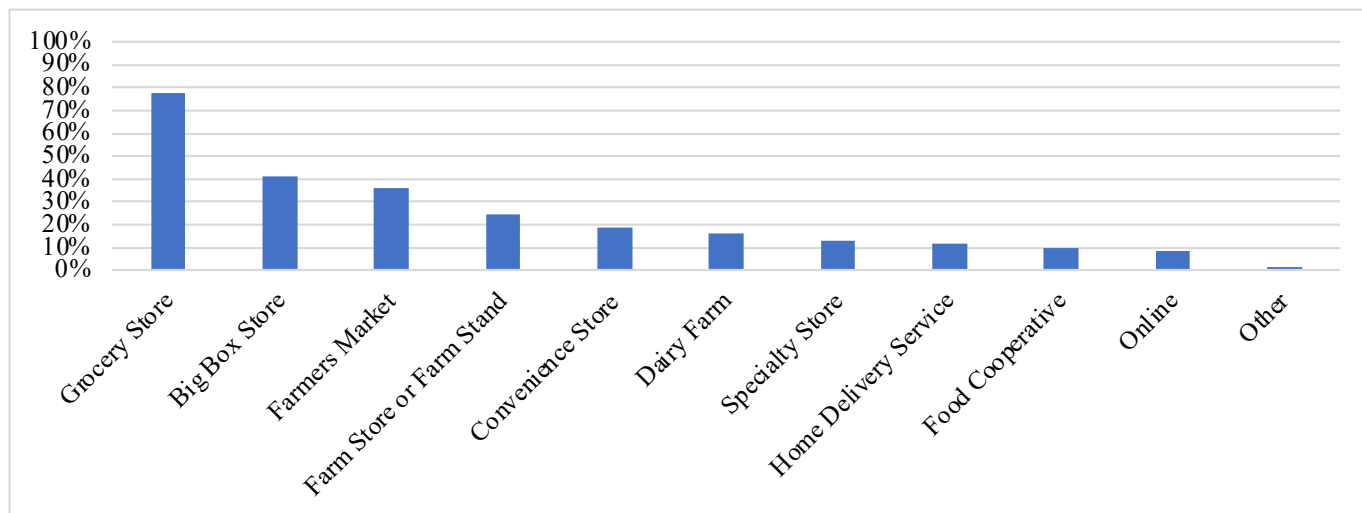
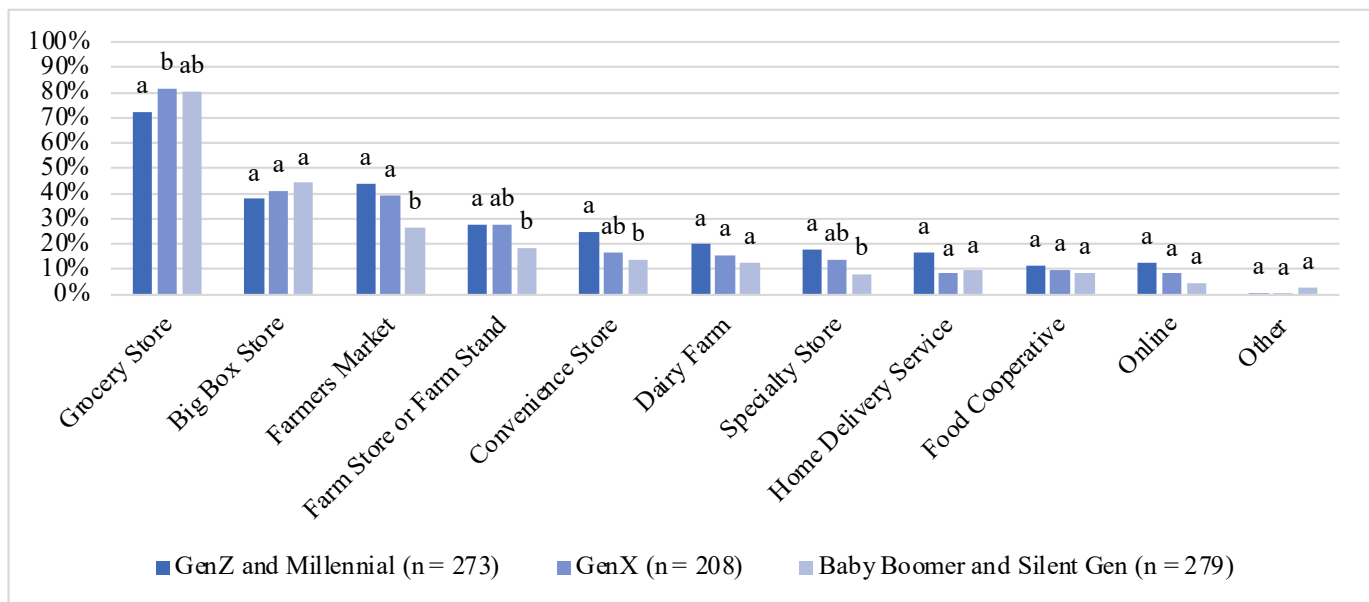


Figure 10. Generational Differences between Desired Purchase Locations



Note: Analysis of Variance (ANOVA) with Tukey's post-hoc test: means with different superscripts are significantly different at .05.

Conclusion

This Tennessee consumers' preference study for farmstead dairy products found that generational differences exist in consumers' consumption and purchase habits. Targeted marketing, according to these differences, could prove highly effective. Differences included:

- Consumption and Purchase Habits: Younger generations spent more on dairy products, possibly because household sizes were larger and the presence of children in those households.
 - Practical Implications: Younger generations (Millennials, GenZ) would be a viable target market, particularly if the farm is located near suburban or urban areas. Within promotions, have representative images of individuals within these generations and with children. People respond positively to seeing images of customers in similar life stages. Provide recipes, information, or activities that are related to the products that can engage children.
- Awareness Channels: Younger generations learned about FSM through social media more than older generations, and they also learned about FSM from restaurant menus. This might be because Millennials are considered the "foodie" generation and spend more time at restaurants than their older counterparts, i.e. GenX.
 - Practical Implications: Identify which social media platform aligns with your target market and consider ways to use that platform to engage potential customers. Provide information related to availability (e.g., location, retail hours, products available) through those channels. Consider product placement in local restaurants and reach out to chefs with products to identify potential collaborations or wholesale opportunities.
- Preferred Purchase Locations: More Millennials had purchased FSM before and did so at a broader range of retail locations than the older generations. All generations were equally likely to buy at grocery stores, which was the most common place to have purchased and want to purchase.
 - Practical Implications: Assess local and area-specific retail outlets. Do any of those options align with your business strategies? Communicate clearly to potential customers where they can obtain your products through various marketing channels.

This study highlights the need for tailored marketing strategies within the farmstead dairy industry. Recognizing the diverse preferences, consumption habits, and media influences among different generations is crucial for effectively engaging consumers and building brand loyalty. Adapting marketing approaches to align with each demographic's values, lifestyle and preferred communication channels may be essential for the long-term success of farmstead dairies. By doing so, farmstead dairies may better engage with their customers, foster brand loyalty, gather new customers and have better customer retention.

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