

# Discovering Younger Generations' Potential in Free From

Rachel Knight – Kantar Worldpanel





## Purchase Behaviour

30,000

households



Continuous scanning



## Consumption Behaviour

11,000

individuals



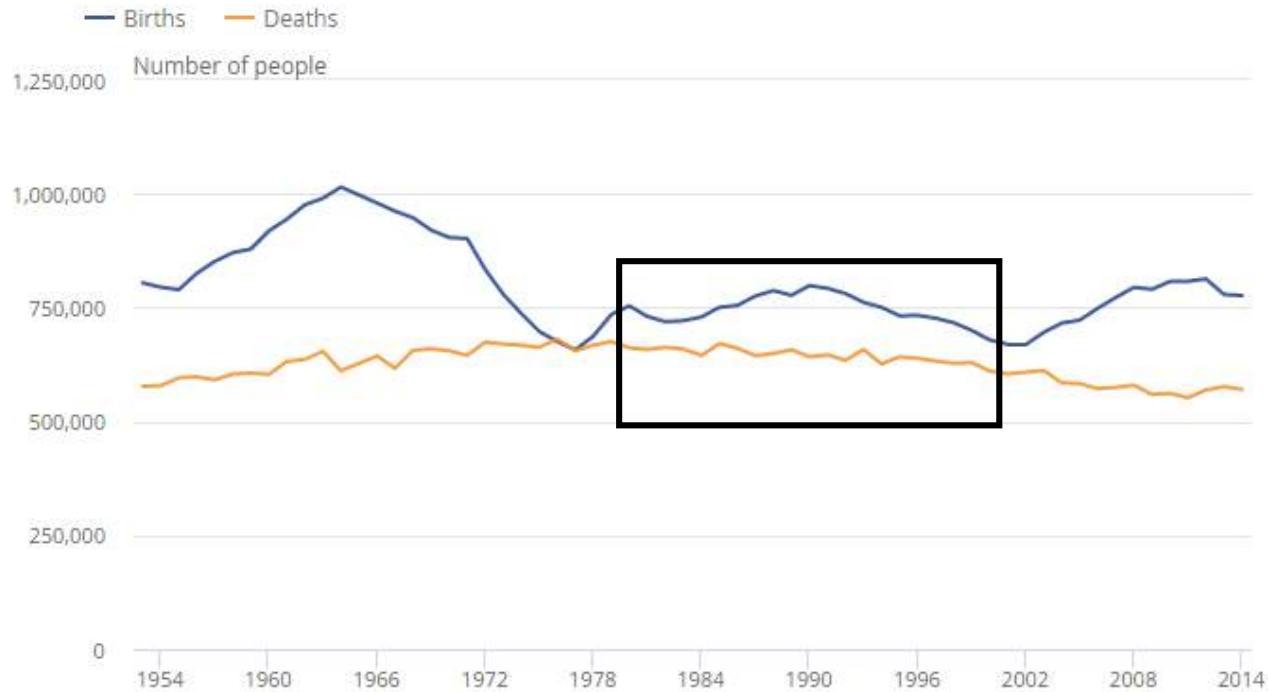
1 week online diary

A photograph showing the back of two young women on a boat. The woman on the left has dark hair and is wearing a blue top. The woman on the right has long, light brown hair. She is holding a white smartphone up to take a picture of the blue, choppy ocean. The text 'Defining Millennials & Gen Z Free From Looking to the future' is overlaid on the left side of the image.

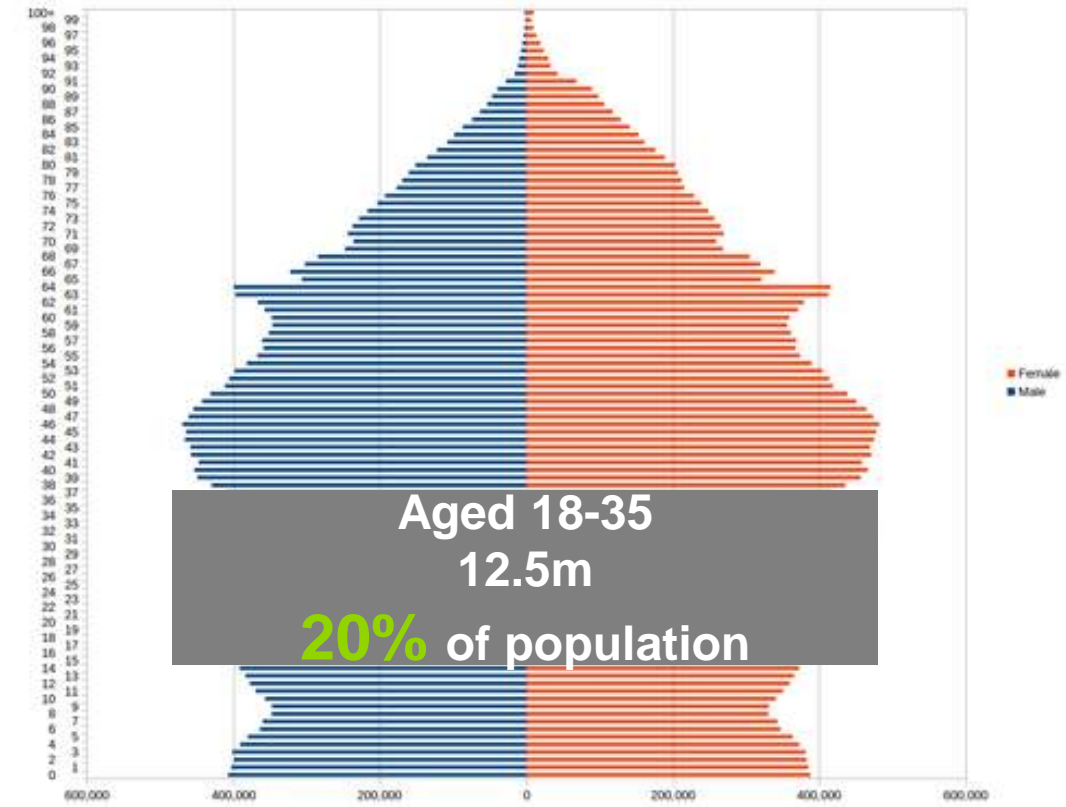
**Defining Millennials & Gen Z**  
**Free From**  
**Looking to the future**

# 'Millennials' – born in the 80s and 90s – currently form a swell in the population at age 18-35

## # births and deaths in UK



## UK age distribution 2014



Source: <https://www.ons.gov.uk/>

# Millennials: The stereotype

THE TIMES

'Trendy' gin becomes the millennial drink of choice



how should  
how should i vote uk  
how should i vote  
how should a suit fit  
how should a cv look

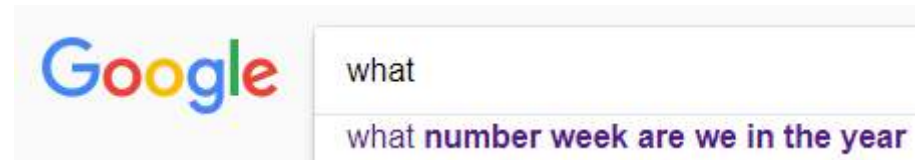


Always connected

Live for today

What they want; when they want it

# Rachel The Millennial



# Generation Z: The stereotype

**The Telegraph**

HOME » EDUCATION » UNIVERSITY EDUCATION

Look out, Generation Z is about to enter your workplace

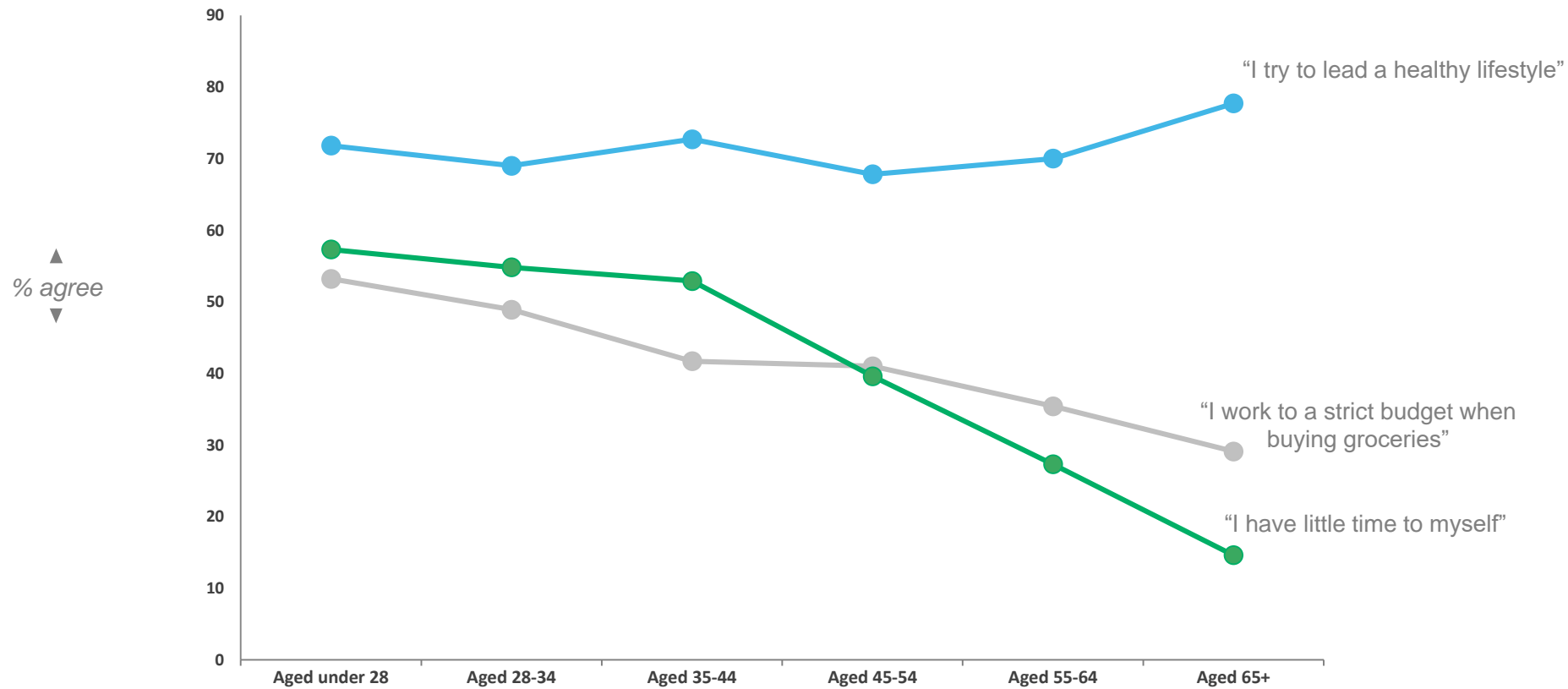


Tech-savvy

High expectations

Multi-taskers

# What is top of mind for younger generations?



✓ Time Poor

✓ Strict Budgets

Not as health conscious

Source: Kantar Worldpanel, Shape of Britain Questionnaire, 52w/e to 16<sup>th</sup> July 2017



# Age can sometimes predict behaviour...

Aged 65+



Small occasions

Small trips

In home Lunch

In Home Snacks

...but often it can't predict behaviour on its own

16-34s: 'Millennials'



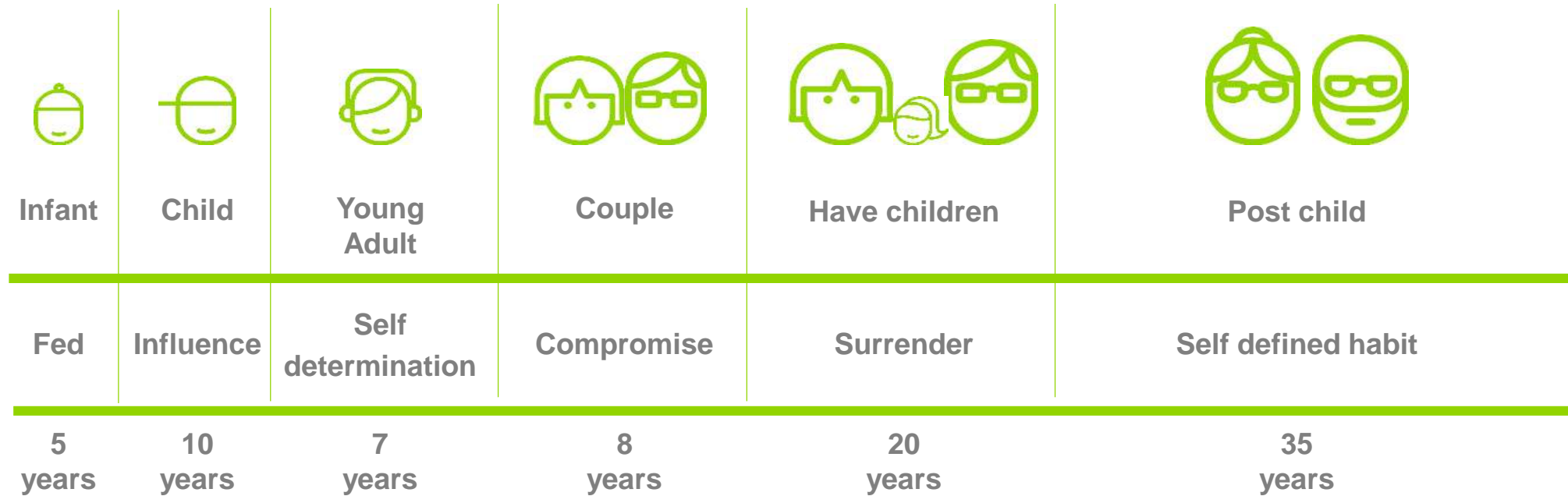
Scratch  
cook?

On the go?

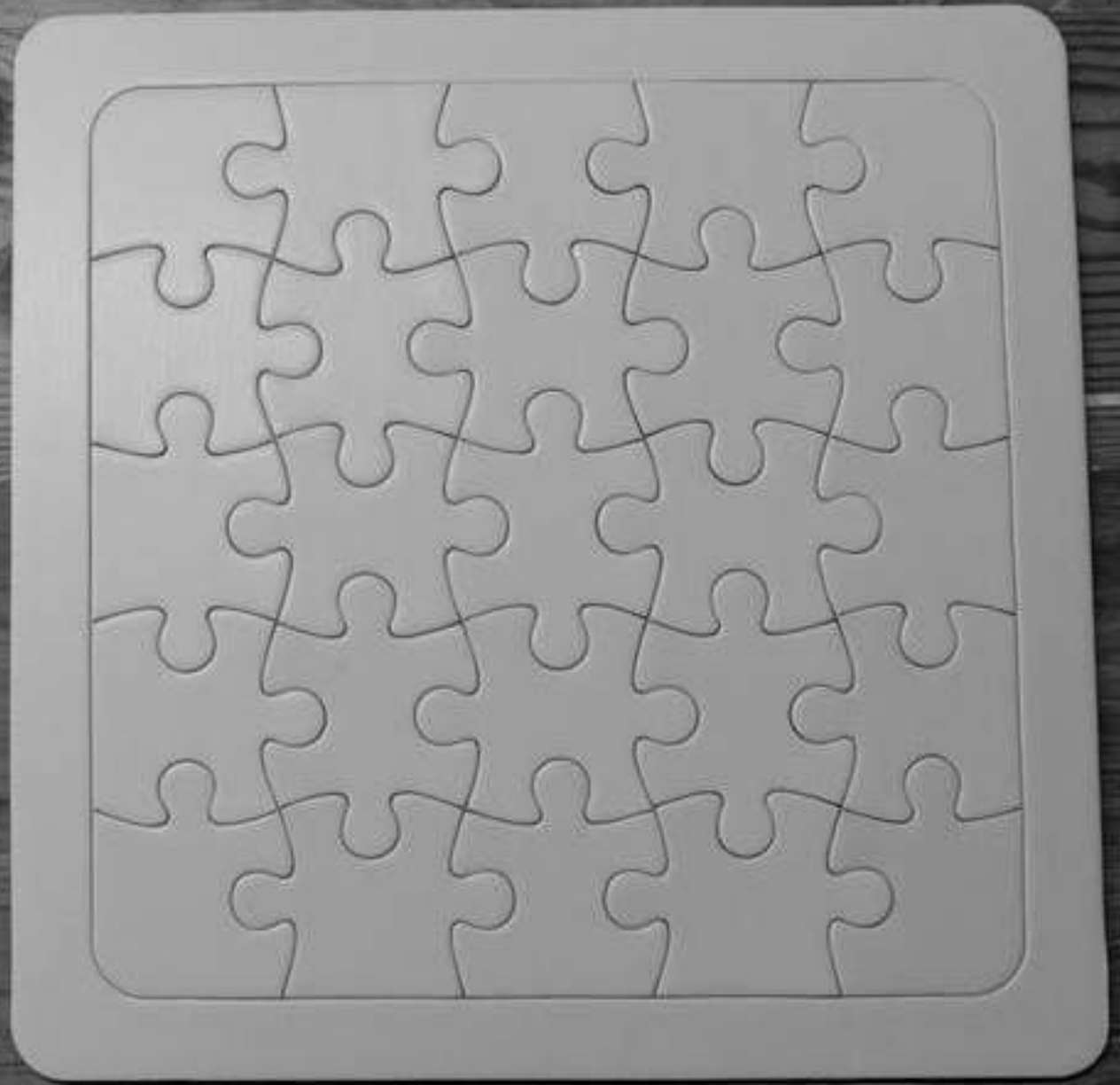
Price  
conscious?

Brand  
loyal?

# Millennials & Generation Z currently fall somewhere in the middle – lots of capacity to change



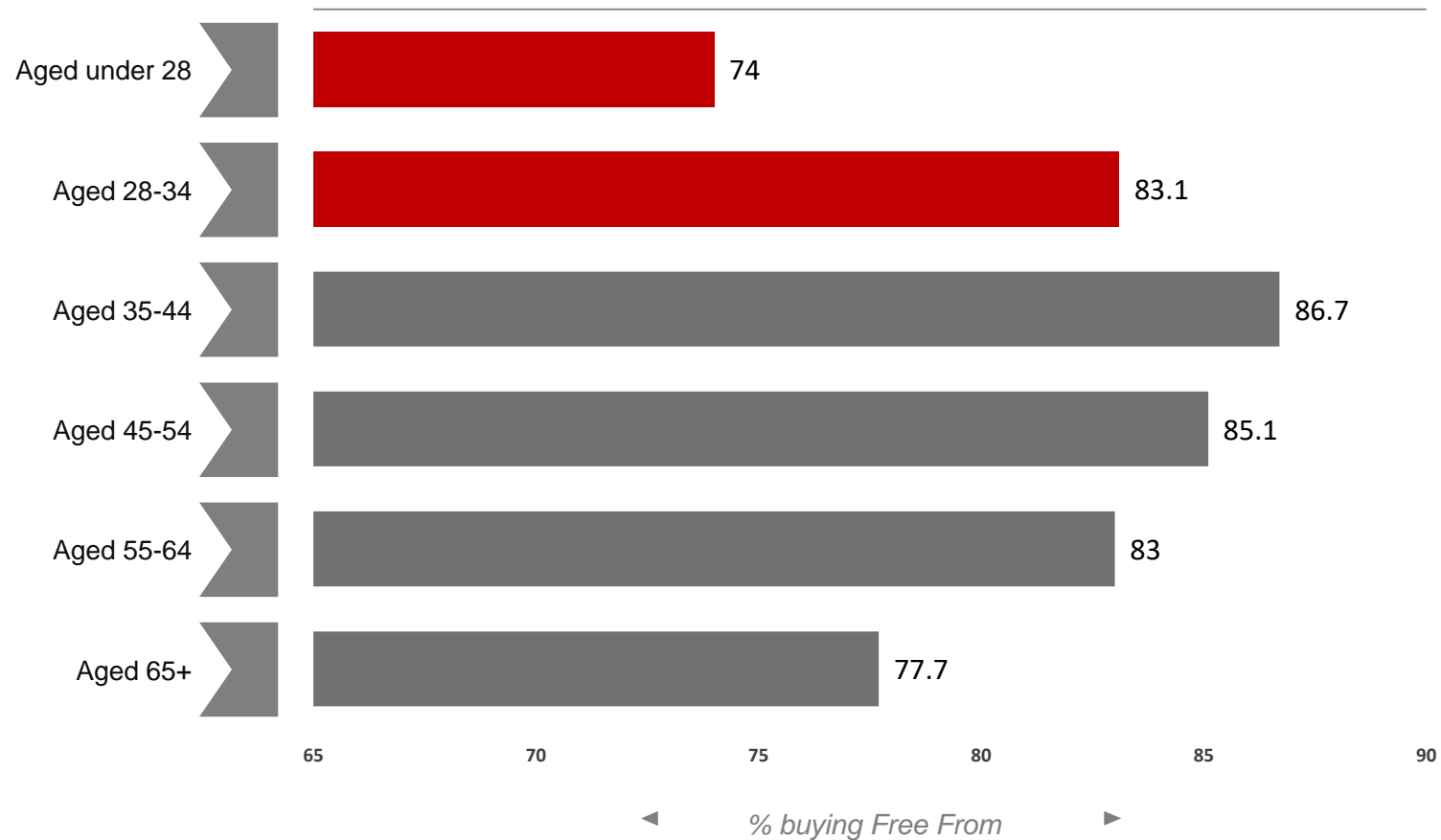
**Age matters –  
but remember  
it's one part  
of the puzzle**





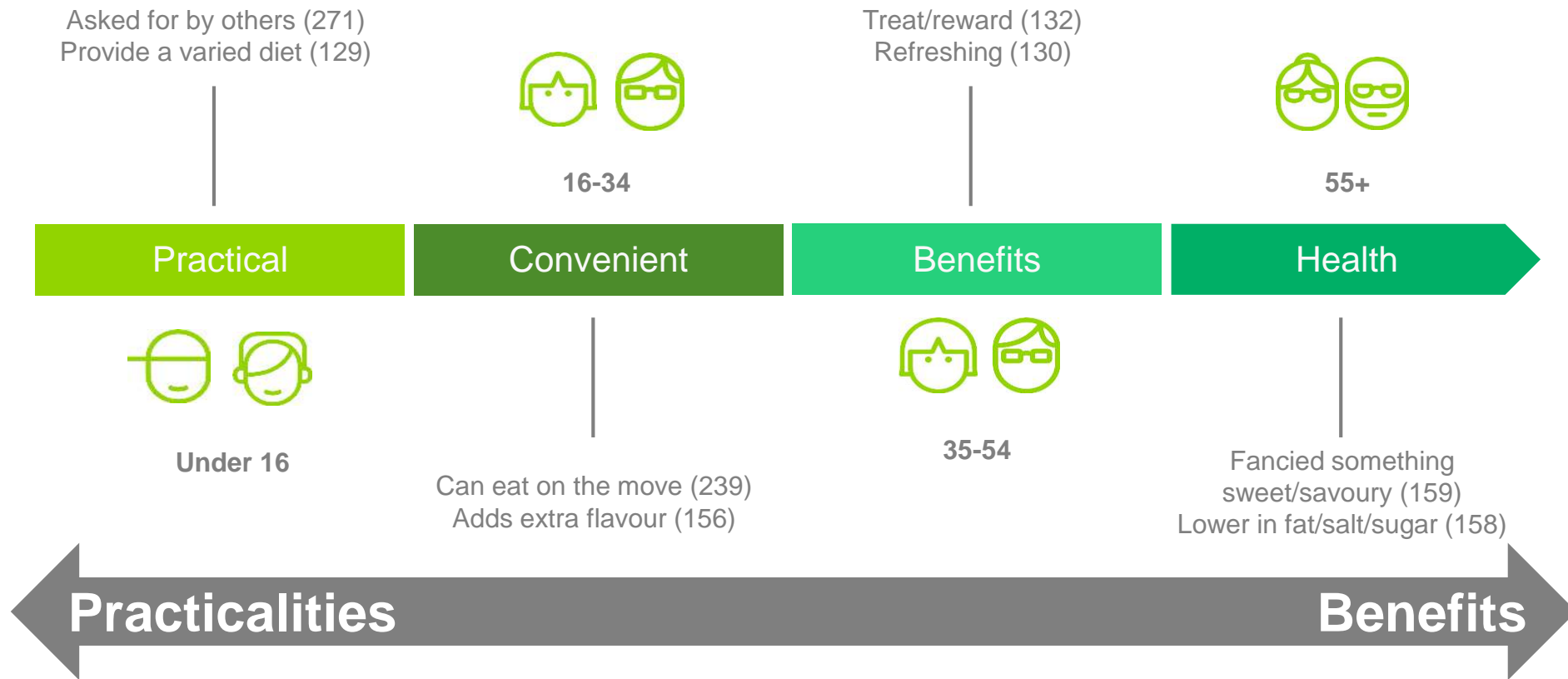
**Defining Millennials & Gen Z  
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# Younger shoppers are less likely to buy Free From – potential to engage



Source: Kantar Worldpanel, Total Free From Grocery, 52w/e to 16<sup>th</sup> July 2017

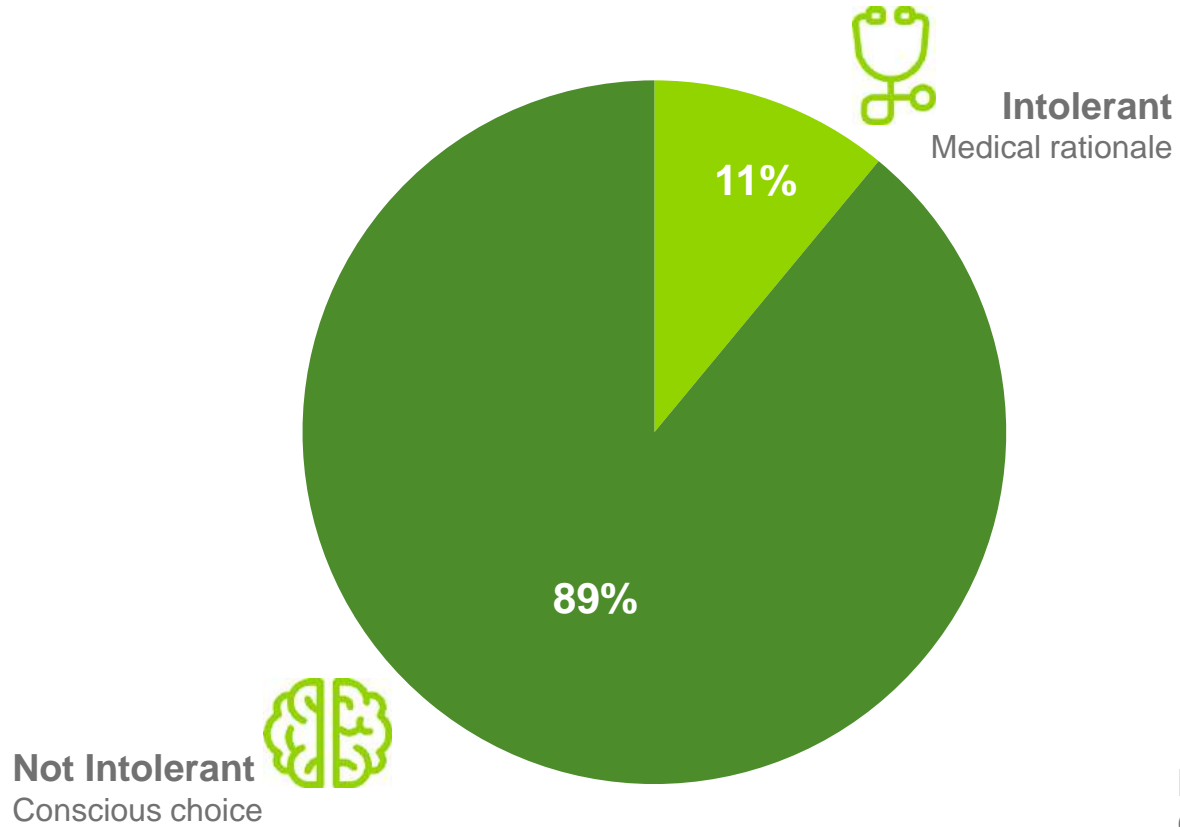
# Reinforcing benefits of Free From could help appeal to younger generations



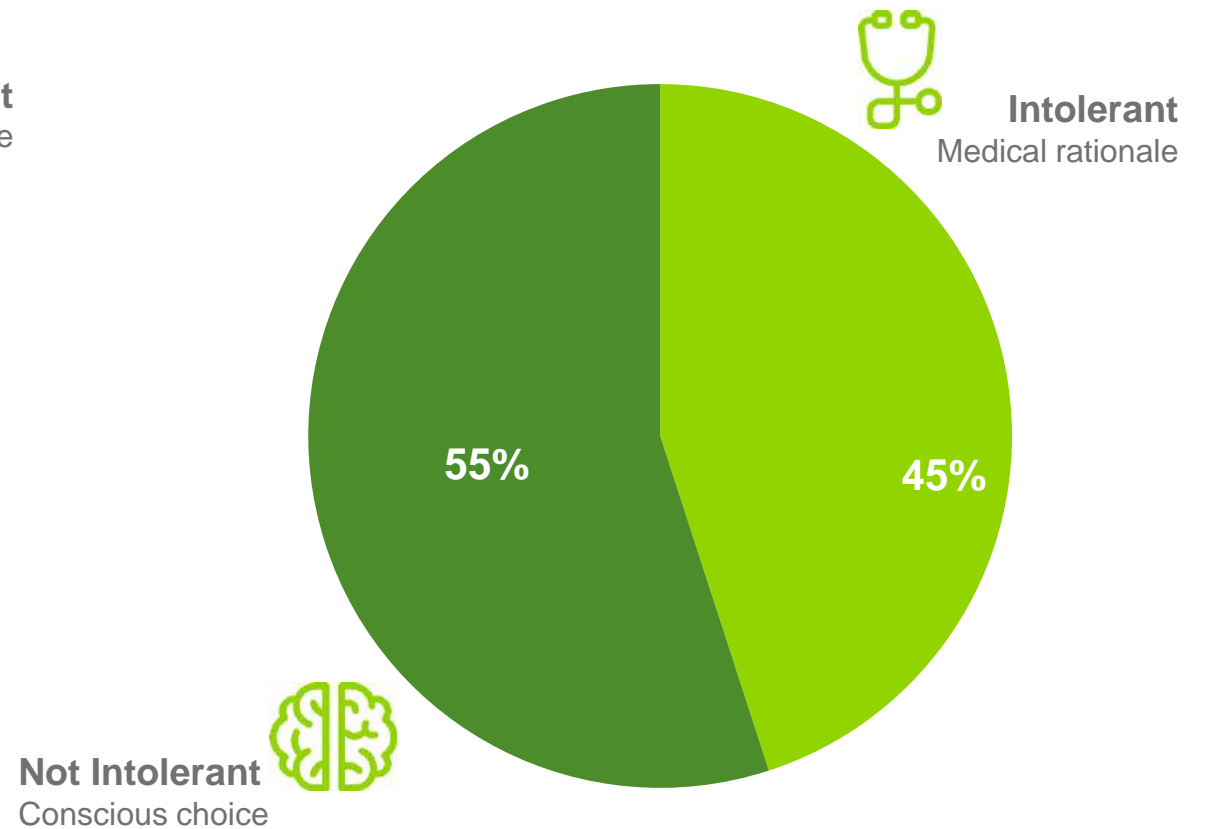
Source: Kantar Worldpanel, Total Free From In Home + Carried Out Consumption, 52w/e to 16<sup>th</sup> July 2017

# 9/10 Free From buyers don't have an intolerance

% Buyers



% Spend





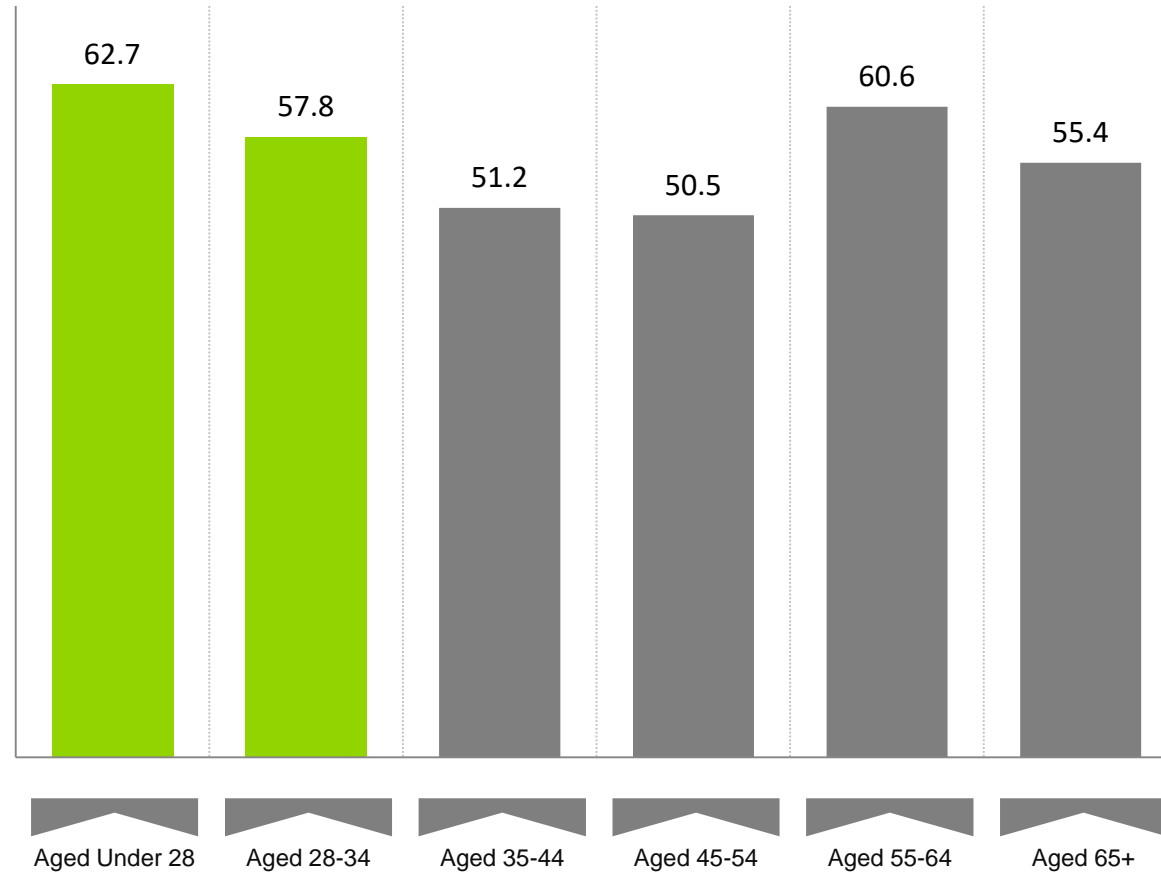
**Potential lies  
with  
lifestylers, but  
don't ignore  
intolerant**



# Free From is most reliant on 'Lifestylers' within younger generations



% of Free From spend from 'lifestylers'

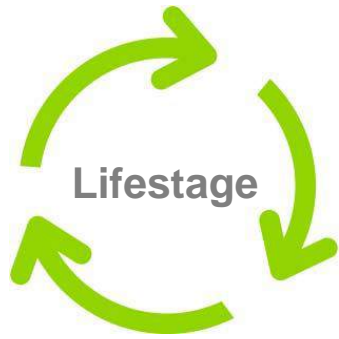


A photograph showing the back of two young women on a boat. The woman on the left has dark brown hair, and the woman on the right has long, light brown hair. The woman on the right is holding a white smartphone up to take a picture of the blue, choppy ocean. The text 'Defining Millennials & Gen Z Free From Looking to the future' is overlaid on the left side of the image.

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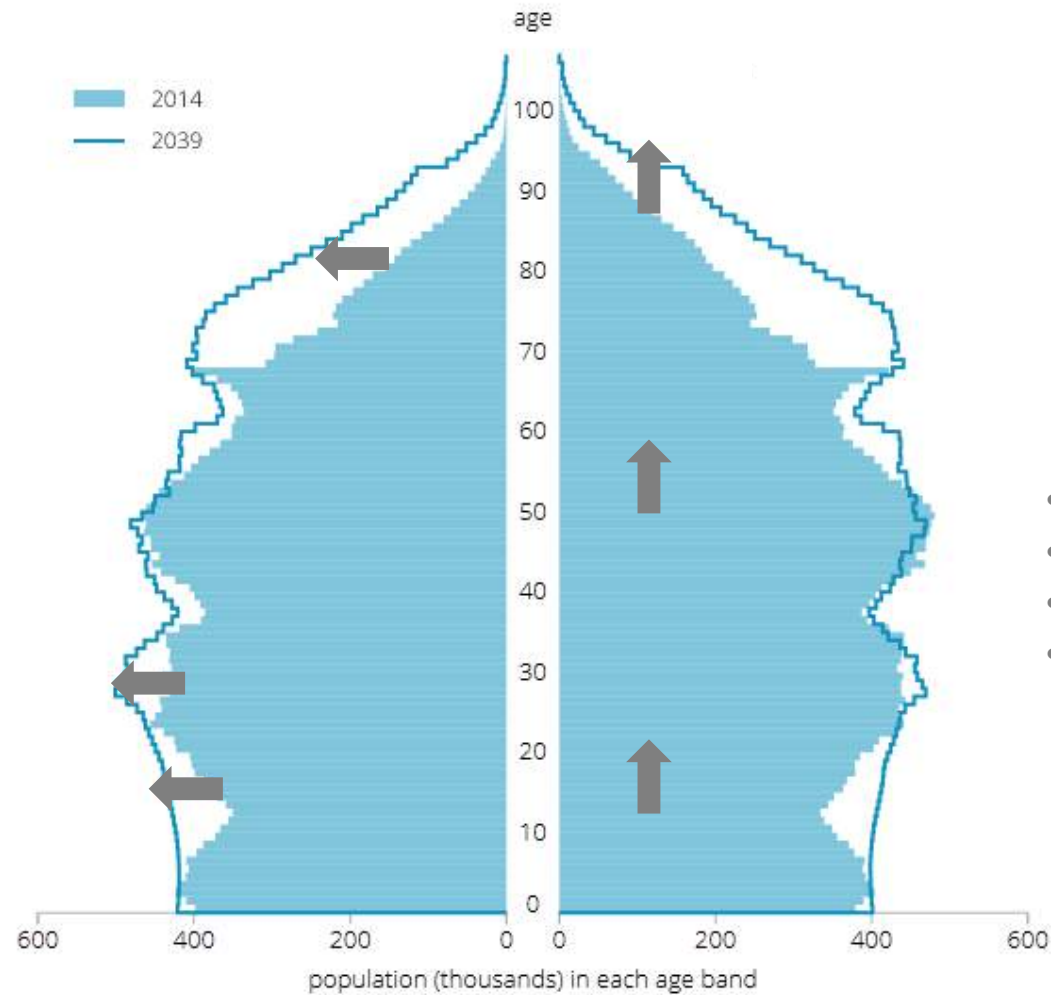


With the forecasted changes in our population, we can make reasonable judgements about how certain products will do...



- Hair dye
- Spot cream
- Antiwrinkle cream
- Shave products
- Takeaways
- Frozen Food

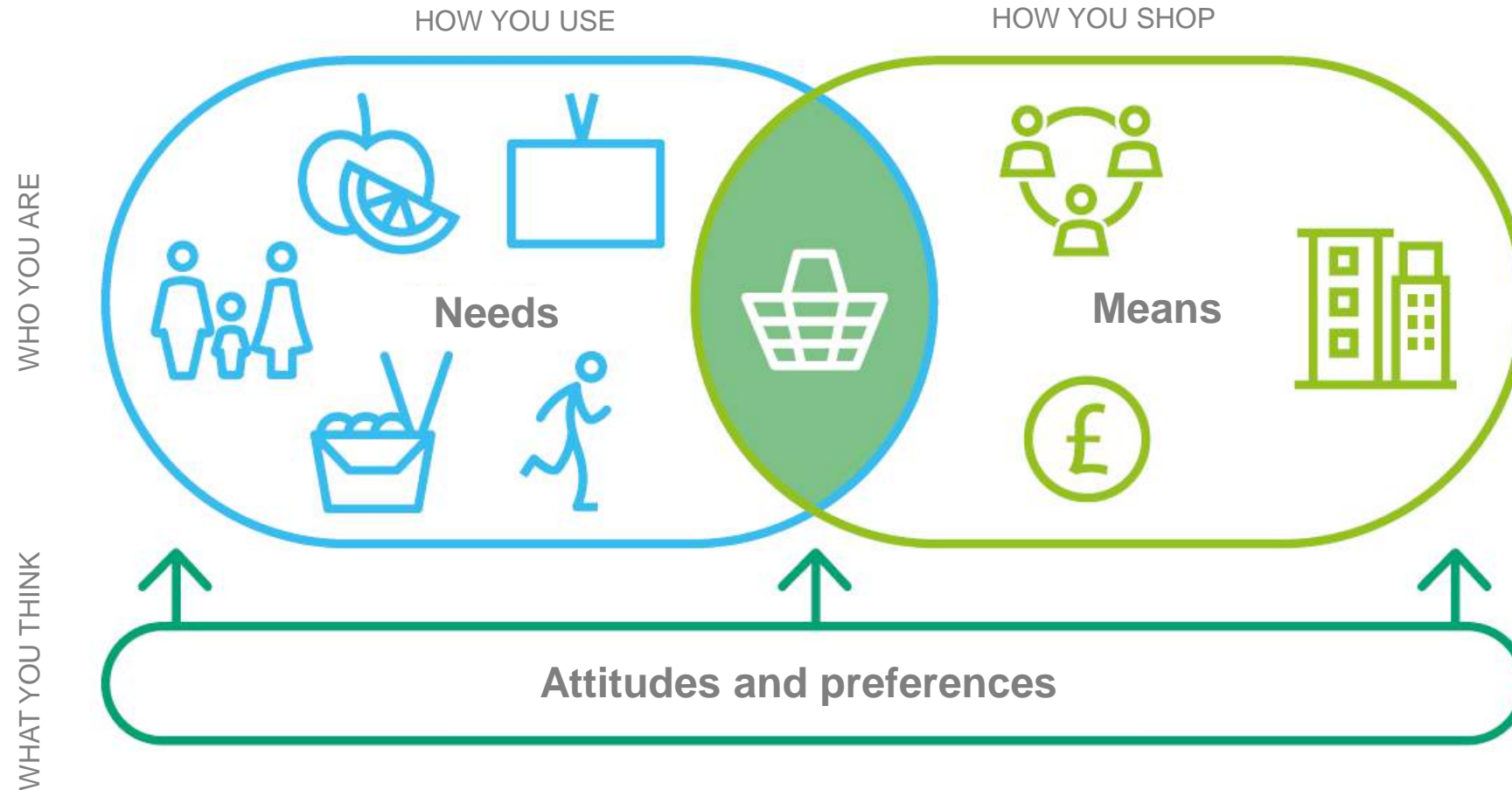
Free From "Lifestylers"

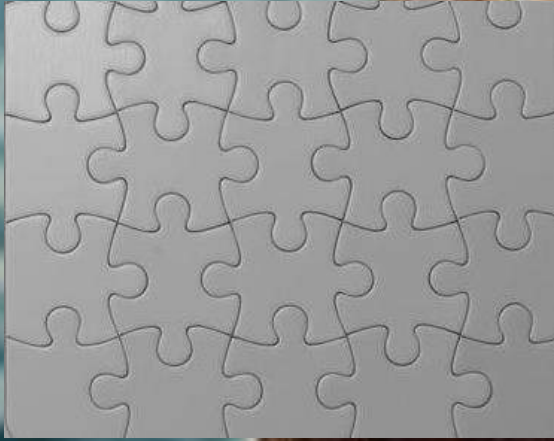


- Rice
- Pasta
- Chilled Dips
- Chilled Pizza
- Marmalade
- Custard
- Lamb
- Canned Meat

Free From "Sufferers"

# To grow with consumers, you must understand who they are – beyond just a number





**Age is only part of the puzzle**



**Potential with “lifestylers” but don’t ignore intolerant**



**Continue to re-engage younger generations**



# Thank You

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