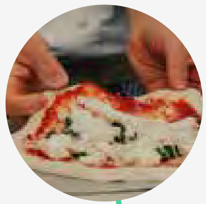
REPORTS

Consumer Horizon

Insights Shaping the Industry

May 2025

Contents



ELLEN MACARTHUR FOUNDATION

WILDFARMED

Introduction

Welcome to the **Consumer Horizon 2025: Insights Shaping the Industry** report – May edition.

Building on the foundation of previous editions, this report is designed to equip brands with an actionable understanding of evolving consumer priorities and market dynamics. In a world where economic pressures persist, technological advancements accelerate, and sustainability demands grow louder, staying aligned with consumer expectations is paramount.

This quarterly edition offers a clear snapshot of the pressing needs, shifting mindsets, and emerging opportunities shaping the retail and consumer goods landscape. As the cost of living and tariffs concerns continue to challenge many households, consumers are reassessing their spending habits, creating a tougher financial environment for supermarkets, restaurants, and other sectors. Brands must work harder than ever to inspire loyalty and drive engagement.

Through data-driven insights, leading product intelligence and practical recommendations, this report explores key themes such as generational wealth and purchasing behaviour, emerging trends across the beauty, home and retail sectors, and strategies to connect more deeply with today's consumers. This edition also includes a spotlight report on Regenerative Farming, created in collaboration with the **Ellen MacArthur Foundation** and **Wildfarmed**, offering a focused analysis of consumer perception and opportunities.

It's more than an analysis; it's a guide to thriving in a rapidly changing marketplace, ensuring your business resonates with the real needs and desires of your target audiences.

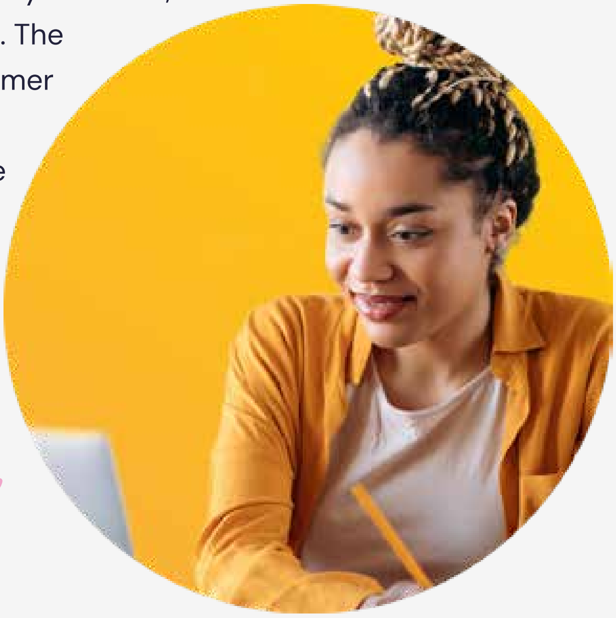
Methodology

Vypr is a leading **product intelligence platform** designed to empower brands with the insights needed to make informed product decisions at the right moments. Our platform leverages **a proprietary community of over 80,000 UK consumers**, providing our customers with direct access to real-time feedback. This unique capability allows brands to refine their strategies and develop products that truly resonate with their target audiences.

We go beyond traditional market research by focusing on the immediate, intuitive reactions of consumers. Instead of lengthy questionnaires, we engage our community with short, targeted questions that capture fast, instinctive responses. This approach is rooted in the principles of **System 1** thinking, a concept popularised by Daniel Kahneman in his seminal work, Thinking, Fast and Slow. System 1 represents the brain's quick, automatic decision-making process, which is responsible for approximately 95% of purchasing decisions. By tapping into this cognitive function, Vypr enables brands to understand consumer behaviours and attitudes with **accuracy and speed**.

Research Methodology

The findings in this report are based upon first-party research, conducted between January 2025 and April 2025. The primary research apparatus used to collate consumer feedback was a bespoke survey application, available on smartphone. The application is device agnostic and allowed a nationally representative community of real UK consumers to provide answers to a broad range of questions. To deliver comprehensive insights, Vypr adopts a mixed-method approach, by integrating both **qualitative and quantitative** research methodologies



Qualitative Research

For our qualitative research, we utilised two distinct types of questions:

Free Text Responses: Engaging a sample size of 50 consumers, this approach allowed respondents to provide open-ended answers. These responses offer deep, personal insights into consumer thoughts and attitudes, capturing the nuances of their experiences.

Sentiment Analysis: Leveraging AI technology, we analysed responses from 250 consumers to summarise the overall sentiment, whether positive or negative, related to specific topics. This method provides a clear understanding of the emotional tone behind consumer feedback, highlighting the underlying sentiments that drive behaviour.

Quantitative Research

Our quantitative research was designed to capture structured, statistically significant data:

Sample Size and Question Types: We conducted surveys with a robust sample of 1,000 consumers. This larger sample size ensures the data is representative of the broader population, allowing us to draw meaningful conclusions across different demographics.

Single and Multi-Answer Multiple Choice Questions: These questions offered respondents a range of predefined options, enabling us to measure consumer preferences and behaviours with precision.

Vykert Scale: Our proprietary Vykert question, a refined version of the traditional Likert scale, uses a sliding scale to capture the intensity of consumer opinions. This provides a more nuanced view of their preferences and attitudes.

Representation: All quantitative research was conducted using a nationally representative sample of 1,000 consumers. This means that proportionate weightings, aligned to the most recent ONS population data (2025), were used to ensure proportional representation associated to age and gender.

Executive summary

Consumer Horizon 2025

UK consumers are becoming more deliberate in how they spend, weighing cost against values like health, sustainability and emotional satisfaction. While affordability remains crucial, it is no longer the only consideration. Across every category, people are seeking products that feel purposeful, transparent and tailored to their lives. This shift presents both a challenge and an opportunity for brands looking to meet rising expectations without alienating value-conscious shoppers.

Plant-Based

Plant-based foods have entered the mainstream, with nearly two-thirds of consumers reducing meat or remaining open to diverse food choices. Over 65 percent are already purchasing plant-based products, driven by animal welfare and health benefits. However, concerns around processing and nutrition are growing, particularly among younger men. To stay relevant, brands must improve transparency and deliver cleaner, more functional options.

Regenerative Farming

Interest in regenerative farming is rising, but consumer understanding remains low. Although many have heard of it, only a minority can explain what it means or identify relevant brands. Appetite for education is strong, and consumers say they would pay more for products with clear benefits. Retailer backing and simple messaging will be key to building trust and unlocking growth in this space.

Health and Wellness

Health-focused behaviours are gaining momentum, especially among younger consumers using digital tools to track nutrition, sleep and fitness. Price remains a barrier, but demand is growing for accessible, multifunctional products that support wellbeing. From protein-rich meals to wearable tech, consumers want practical solutions that align with their routines and budgets.

Generational Wealth

Older consumers are emerging as a high-value but under-served group. Over-65s are less price sensitive, more loyal to grocery brands and more focused on quality. Yet many feel overlooked in retail and hospitality. For premium brands, this group presents a clear opportunity to engage with an audience that has both spending power and unmet needs.

Looking Ahead

The insights in this report reflect a changing consumer mindset that is both complex and full of possibility. By understanding the evolving balance between price, purpose and personal value, businesses can better anticipate future needs and deliver more meaningful solutions. This report is not just a reflection of current trends but a tool to help predict where consumers are heading next. By investing in innovation, prioritising transparency and aligning with consumers' values, brands can deepen trust and build long-term relevance in an increasingly competitive marketplace.

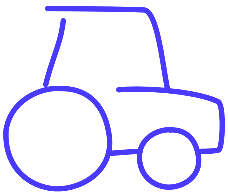
Core highlights

Plant-based boods

Almost two-thirds (62%) of the UK population are either actively trying to reduce their meat consumption or are interested in eating all types of foods.
Page 11

Dive into the full **Plant-based foods** report on page 8

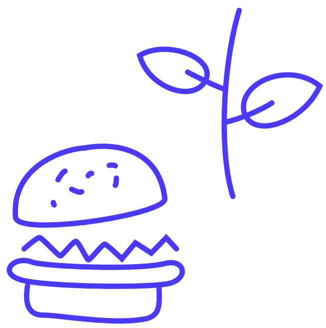
Regenerative farming



Almost three in five (60%) lack basic education on regenerative farming.
Page 28

Health & wellness

More than half (56%) of consumers consider plant-based protein interchangeable with meat.
Page 78



Generational wealth

The 65+ demographic is the only group that does not list price as the top priority in supermarkets, instead they value quality and freshness of ingredients.
Page 105

Part 1

Growing the plant-based market

In-brief

The plant-based market is at a pivotal moment. While consumer demand for plant-based options remains strong, the supply side is evolving, with brands consolidating and reassessing their strategies.

The market is **no longer just about vegans or vegetarians**. A spectrum of consumer groups could engage with plant-based products, from active meat reducers to open-omnivores and current strict carnivores.

To help brands and retailers adapt to their evolving customer base, this report seeks to understand two key consumer groups making up two-thirds of the population, the **"Open Omnivores"** and **"Active Meat Reducers"**. As the research unfolded, we discovered two very different sets of needs, motivations and perceptions.

Attracting these groups and helping them overcome reservations, from a lack of awareness to concerns about processing levels, could lead to significant growth for plant-based products. This research supports and directs the brands on this journey.

Two-thirds of the Market, Up for Grabs Our research reveals that almost two-thirds of UK consumers fall into two key groups who are open to plant-based products but face barriers to entry. Understanding these groups is critical for brands seeking to broaden their audience beyond traditional plant-based shoppers.

A Tale of Two Audiences The Open Omnivores and Active Meat Reducers may sit within the same opportunity pool, but they show vastly different behaviours, awareness levels and motivations. Brands need to address these distinct needs to unlock the full market potential.

Turning Interest into Growth **This report offers clear insight into what's holding these consumers back**, from perceived taste and texture issues to low awareness and concerns around processing. By addressing these concerns and shifting their approach, brands have the opportunity to grow their customer base and strengthen their position in the evolving plant-based market.

Highlights

The potential plant-based market is broad: Almost two-thirds (62%) of the UK population are either actively trying to reduce meat consumption or are interested in eating all types of foods.

Page 10

Men over 65 years are 2.6x more likely to reject a plant-based product than men under the age of 35 (60% vs 23%).

Page 14

Women aged 18 to 24 are almost three times (2.8x) more likely to purchase plant-based foods for friends and family.

Page 11

For men between the ages of 25 to 34, health benefits are the top driver to reduce meat intake.

Page 12

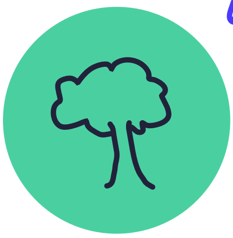
Open omnivores have a relatively limited understanding and engagement with plant-based products

Page 17

Dive into our 'Growing the plant-based market' section to discover key insights and cross-sector takeaways.

Defining the key consumer groups

The market for plant-based products is no longer limited to vegetarians or vegans. Our research uncovered that almost two-thirds (62%) of the population are either **Active Meat Reducers** or are **Open Omnivores**, which represents a significant market for plant-based brands.



Active Meat Reducers

Actively trying to reduce meat consumption

Open Omnivores

Interested in trying plant-based alternatives

Strict Carnivores

Men between the ages of 18 and 34 are the demographic most likely to reduce meat consumption (33%). Women aged between 18 and 24 lead the way for eating all kinds of foods, with more than two in five (41%) describing themselves as open omnivorous.

Just over a third (38%) of customers would not be open to plant-based products, describing themselves as "**Strict Carnivores**". Men aged 55 and over are 1.3x more likely to fall into this category (51% vs 38%).

There is a distinction between shoppers and consumers. Some people buy plant-based products not for themselves but for others, such as parents purchasing for children or hosts catering for guests. Corroborating this theory, we found that slightly more people buy plant-based products than consume them (65% vs 62%). We quantified these groups to inform brands on market sizing and targeting strategies.

One in three (35%) consumers do not buy plant-based products at all. For men over the age of 65, this rises to more than three in five (60%), showing a strong distaste. This group is 2.6x more likely to leave a plant-based product on the shelf than younger men who are under the age of 35 (60% vs 23%).

Reassuringly for brands, the majority (65%) of consumers are now putting plant-based foods into their shopping baskets. Around half (33% out of 65%) of these shoppers will go on to eat the products themselves. This could mean that they eat them alone, with friends or family, or combine them with other foods.

The rest are buying plant-based foods for other people, such as partners (9%), children (7%), family (6%), friends and guests (6%) or others (5%). In this context, other people could include colleagues, clients, patients, neighbours, or any other group.

Women aged 18 to 24 are almost three times (2.8x) more likely to pick up plant-based foods for friends and family, suggesting that alternatives to meat are more common within their demographic.

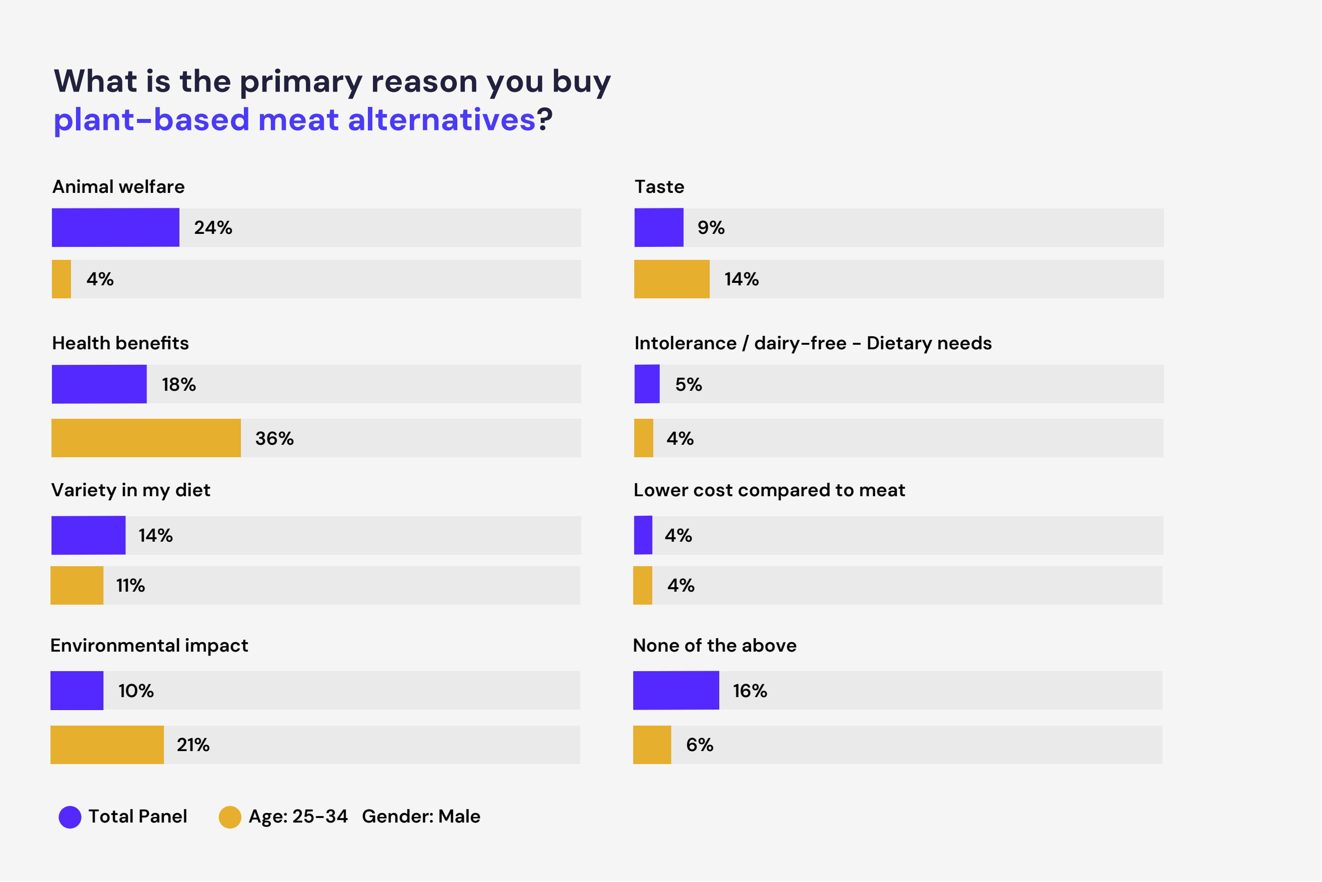
While self-consumption drives plant-based purchases, a strong cohort of people buy out of consideration for others.

Motivations for buying plant-based foods

Our research shows the Active Meat Reducers are driving consistent revenues in the plant-based sector. Understanding their motivations and concerns is key for brands looking to expand market share. Zoning in on this group, we asked the 843 Active Meat Reducers in our survey what were their primary motivations for consuming plant-based products.

For one in four (24%) Active Meat Reducers, animal welfare is the top motivation for switching to plant-based alternatives. Women aged between 45 and 54 were 1.3x more likely to opt for this than the average population (32% vs 24%). Overall, women over the age of 25 seemed a little more concerned with animal welfare in general.

Health benefits were voted overall as the second strongest motivator (18%). However, for men between the ages of 25 and 34, it was the top driver. This group was twice (2.0x) as likely to vote for health benefits compared to the population average (36% vs 18%).



Deepdive into the 25 to 34 age group

The 25- to 34-year-old age group is an interesting category because most of this group will have left education or further education and may be working their way up the career ladder. It's often a time of juggling lower salaries, higher rents, and more socialising.

Unlike the other demographics, men in this group voted animal welfare as the least important motivation for buying plant-based products (4% vs 24%). They are much more interested in their health first (36%), and the environmental impact second (21%). This could show that they are considering their futures as they shop. Brands looking to appeal to this segment could also consider the sustainability of their packaging, for example, by switching to single-use plastic for combustible alternatives.

Women aged 25 to 34, however, are more likely to vote for animal welfare than other groups as their top motivator (28% vs 24%). A long way second comes health benefits (15%). While women in this demographic may also consider the environmental impact, they are less likely to select this as a primary motivation than men of the same age (13% vs 21%).

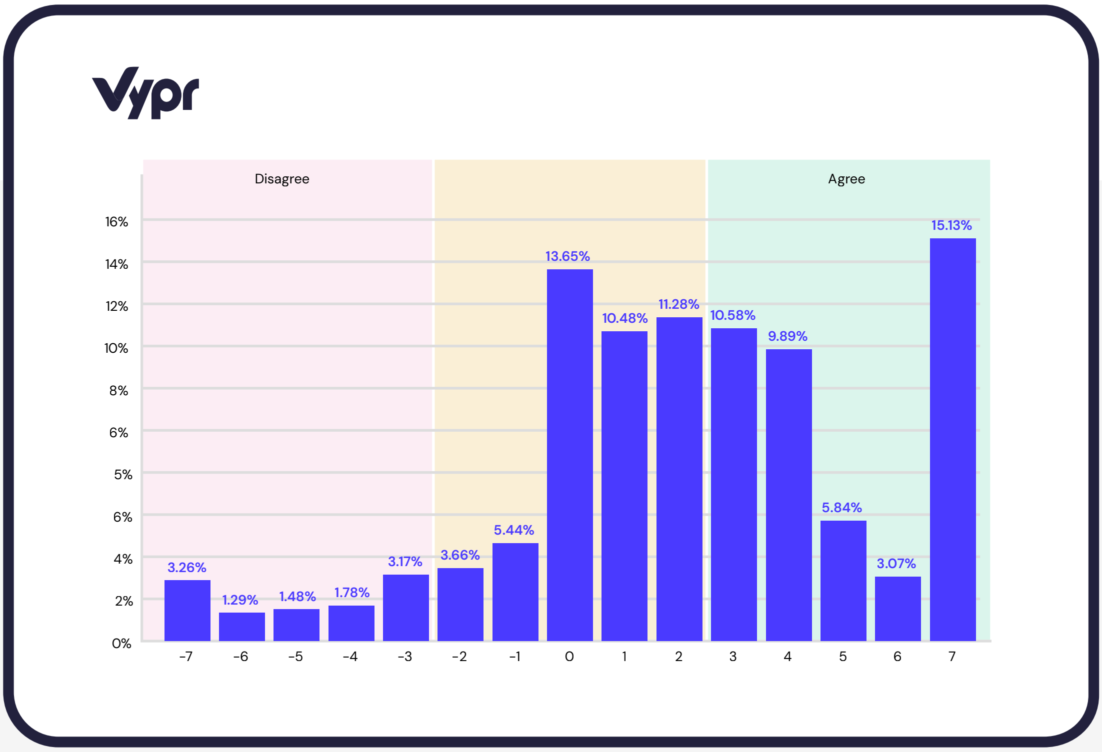
Digging deeper, we asked the Active Meat Reducer group how satisfied they were with the current selection of plant-free products on the market.

Overall, dissatisfaction is low, affecting slightly over one in ten (11%) of this demographic. Within this group, there were no clear front runners. Men over 65 years of age were the most unhappy with the products available, followed by women between 18 and 24. However, as the number of respondents in these groups are relatively low, it is hard to draw any conclusive findings.

The remaining participants are equally split between feeling neutral and satisfied with the plant-based products available.

However, the distribution reveals a more complex landscape. While a sizable portion of consumers are content, the high number of neutral responses indicates a lack of standout differentiation or excitement in the category. This aligns with what's being observed across the industry: a saturation of plant-based brands, many of which are now consolidating or exiting the market. Although the shelf appears full, consumer engagement is not uniformly high, suggesting room for improvement in product quality, innovation, or range relevance.

I'm satisfied with the current selection of plant-based products available in stores?



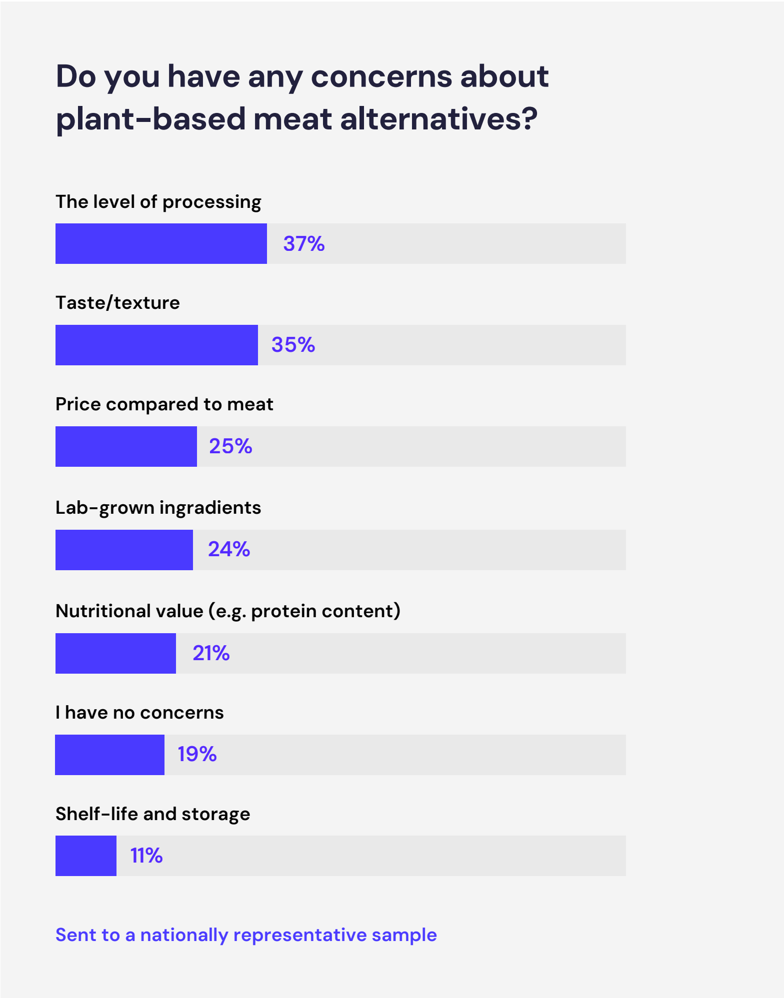
Consumer concerns around buying plant-based foods

Almost nine in ten (89%) consumers have some worries about plant-based products, which could be holding them back. With more than a third of votes each, the most pressing issues are the levels of processing (37%) and the taste or texture (36%).

In general, women tend to be more concerned about the processing levels. The 55 to 64 years age group are the most concerned, with one in two voting this as the biggest issue - 1.3x more than the population average (50% vs 37%). This may be because they want to make extra healthy choices around the time of menopause or are considering their health more in the run-up to retirement.

By contrast, men were most concerned about the taste or texture of plant-based foods (36% vs 36%). It became much more of a barrier for older males than for younger men. For example, more than half (52%) of the men aged 65 and over voted this as their top deterrent.

A top hurdle for one in four (25%) consumers is the price of plant-based products compared to meat.



This corroborates the earlier finding that just 2% of Active Meat Reducers are motivated to switch because of the price. Although plant-based foods often tend to have similar or cheaper prices than meat versions, there seems to be a consensus among a large part of the population that they should be significantly cheaper - possibly closer to the price of vegetables.

According to just under one in four (24%) people, the question of lab-grown ingredients is the fourth largest barrier. Women aged 45 or older are 1.4x more likely to be put off by this (34% vs 24%).

Meanwhile, men under the age of 34 are 1.3x more likely to be concerned about plant-based foods' nutritional value and protein content compared to the population average (29% vs 21%).

This group of younger men is also 1.7 times more likely to shun plant-based products because of concerns about shelf life and storage (18% vs 11%).

Mixed consumer awareness

Understanding what target markets already know about plant-based products is an important foundation for brands to build on. To find out, we asked two different consumer segments to list plant-based foods or meat alternatives they were aware of.
The first set of responses came from Open Omnivores; those open to plant-based but not yet regular consumers. The second came from Active Meat Reducers; those already reducing their meat intake and regularly eating plant-based.

Open omnivores

While this group may be open to trying plant-based products, they have a limited awareness of what they actually are. In a free text survey, several respondents admitted that they didn't really know what qualifies as plant-based or that they don't fully understand the question.

This shows a greater level of uncertainty or hesitancy. To overcome this, brands and retailers could educate consumers with more information on shelves, packaging and social media. Simple definitions, as well as showcasing a range of options alongside their benefits could help to boost consumer awareness and confidence.
The trend of uncertainty repeated across almost all of the answers, even among the more knowledgeable Open Omnivores. Mentions of specific brands or meat alternatives were minimal or absent. And overall, responses tended to focus on well-known staples like tofu, mushrooms, lentils and nuts. As well as being quite basic, these foods could also be perceived as bland - both in colour and taste - perhaps showing a lack of excitement among Open Omnivores for plant-based foods.

To overcome this, brands could present vibrant and flavourful dishes in their marketing. After all, plant-based foods are one of the most colourful diets, incorporating a wide range of natural ingredients like fruits, vegetables and legumes. It could, in theory, be one of the most appealing and inspirational to look at. Highlighting the different ingredients alongside their health benefits could further boost consumers' horizons.

Creating bright and colourful educational material could help to increase confidence and familiarity for this group.

Active meat reducers

In stark comparison to the Open Omnivores, the responses from this group were confident and varied. This indicates that Active Meat Reducers engage with plant-based foods, keeping up with new products and innovations.

Some of the ingredients which came up frequently include tofu, tempeh, chickpeas, soy and spinach. Consumers were also able to name brands, with some of the most commonly cited being Quorn, Linda McCartney and Beyond Meat.

Zooming in on the products themselves, this group tended to cite more processed foods. For example, pea or whey protein, vegan sausages and burgers came up. The topic of processing was brought up a few times with different viewpoints. As one respondent wrote, “Quorn and soya protein - I don't buy a lot, even though my daughter has a milk/egg allergy. Food is so processed; food is not meant to be fiddled with so much.” On the opposite end of the spectrum, another thought the processing was worth it because of convenience. They said, “I just buy the products that are already processed and ready to cook".

In general, Active Meat Reducers are much more fluent in identifying meat alternatives. They are engaged in the topic and soaking up the information. However, some question marks are forming around the level of processing, which could be off-putting.

Two consumer groups with very different awareness levels

As brands hone their marketing, they face two very different consumer segments.

On the one hand, most Open Omnivores are starting almost from zero in their plant-based journey. They tend to have little awareness of what products are available and may think of the flavours as quite bland. This outdated view of plant-based products could present challenges for retailers and brands. Engaging education is needed to showcase the wide range of flavourful and healthy options to overcome these awareness and perception hurdles.

Streets ahead are the Active Meat Reducers. Most of this group have a fairly sophisticated understanding of the brands and products on offer. They tend to be on a different level and are now scrutinising plant-based foods for health and quality. A subset of this group is looking for less processing. Brands that can continue to offer plentiful products for every palette while minimising processing levels could score points with these consumers.

Key takeaways

1. **The market opportunity for plant-based products is growing.**

   Two-thirds of the population are potential customers. Even for those who are not consuming themselves, many are buying for friends, family, and others. To broaden their appeal, brands should reflect their growing customer base, perhaps catering to different groups such as teenagers and children.

2. **Animal welfare is the top motivator for most people who are reducing their meat intake.**

   This is especially true for women over the age of 25. Incorporating this into branding, for example, with cruelty-free labels, could help to appeal to this group. Augmenting this message across packaging, promotions, and in-store displays could direct more shoppers towards meat alternatives or plant-based products.

3. **The health benefits of plant-based foods are the second strongest motivator for Active Meat Reducers.**

   For men, it is the number one driver, particularly for those between the ages of 25 and 34. Brands can capitalize on this preference by promoting the health benefits, especially those that might affect this age group. These could include, for example, higher protein levels to promote muscle mass, natural foods for better mental health, or nutrients for stronger immunity.

   As well as appealing to this demographic of consumers, brands could also try to appeal to the shoppers who may be making the purchasing decisions for them. Our research finds that women tend to buy plant-based products for others more often, and they may be reading the packaging to discover more about the health benefits for their sons, partners, fathers or other men in their lives.

Key takeaways

4. **To alleviate the most pressing consumer concerns, brands should focus on improving both the levels of processing as well as the taste and textures of plant-based foods.**

   These concerns may sometimes be perceived, meaning that better education is needed. While in others, it could mean a product re-design.

   Messaging around the processing levels could be most effective if it was slightly more targeted to women aged 45 to 54.

   Meanwhile, the (perceived) taste and texture tend to be more off-putting to men, particularly older men. Taking inspiration from marketing campaigns like, "I can't believe it's not butter", brands could overcome this hurdle by reassuring consumers.

5. **Consumers have a wide range of product awareness levels within the vast and growing plant-based market.**

   On one end of the spectrum, Open Omnivores know relatively little about what's available. What's more, they tend to have quite a bland perception of plant-based foods. On the other end, Active Meat Reducers are generally well-informed about what's available but express concern over the processing levels.

   While these groups require individual awareness campaigns targeting their different needs, there are some crossovers. For example, both demographics would be open to education about low-processing options. They would probably also both value inspirational content about flavourful and vibrant natural options on supermarket shelves.

The path forward for plant-based brands

Consumers are increasingly considering their role in improving animal welfare, the climate crisis and the planet. At the same time, they are showing increased distrust about the adverse health impacts and high processing levels in conventional foods. They're also price-sensitive, considering the cost in their calculations. With these three aspects colliding, there is a strong and growing movement towards low-cost and healthy meat alternatives.

Plant-based products have the potential to offer consumers guilt-free versions of the dishes they love at affordable prices. The trend can also introduce them to new foods and flavours that may be currently missing from their diets, such as more mental health-boosting legumes or nutrient-dense proteins.

However, plant-based brands have some work to do to truly realise their potential. Firstly, they need to raise awareness (and undo the perception of blandness) for the Open Omnivores. Secondly, they should seek to inform and inspire the already proactive meat reducers about minimally processed natural products. And across their products, brands can lean into consumer motivations like zero animal cruelty, enhanced health benefits and planet-friendly choices. At the same time, they should push back against perceptions of unappealing tastes and textures or overzealous processing.

For the brands that can grow with their markets, the rewards could be fruitful - not only for the customers, but for the whole planet.

Part 2

Hungry... for education

Consumer perceptions and awareness of regenerative farming

In-Brief

With climate anxiety and the collapse of biodiversity weighing heavily on consumers, regenerative farming brands hold extraordinary potential. They have the power to alleviate a myriad of problems.

These brands support pollinators, slash plastic pollution, and cut carbon emissions. They also support local farmers with sustainable solutions and offer a wide range of nutrition benefits. In theory, this should satisfy almost every demographic. There are, however, two significant hurdles that regenerative brands must overcome: awareness and price.

As this research uncovers, a widespread lack of awareness is costing brands dearly. It prevents would-be consumers from placing the products in their baskets and talking about them with others - one of the most effective forms of marketing.

The perception of higher prices is another block. A third of consumers refuse to pay extra for regenerative products. But there are strategic ways around this, which this report explores.

Consumers are ready to learn

Most consumers may not fully understand regenerative farming, but there is clear curiosity. Seven in ten people who haven't heard of it want to know more, and those who are informed are far more likely to buy. This signals a strong opportunity for brands to engage, educate and drive meaningful behaviour change.

The power of trust and familiarity

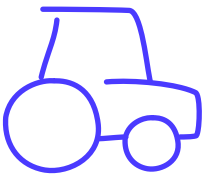
Consumers are far more likely to trust regenerative products when they are endorsed by major retailers or well-known brands. Familiarity matters, and premium supermarkets already have an edge. Brands that can build visibility and credibility in these spaces are well-placed to unlock demand.

A market poised for growth

The majority of consumers believe regenerative farming will grow in importance. Many are open to switching to regenerative products, especially if the benefits are clear and pricing is fair. For brands and retailers, there is a real opportunity to lead this movement and make regenerative options part of everyday shopping.

At the heart of this research lies an urgent need for much more impactful consumer awareness and education. In the following pages, we present opportunities to rise to this challenge.

Highlights



More than two-thirds (67%) of consumers **have heard of regenerative farming,** however, of those, 43% don't know what it means

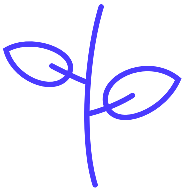
Page 27

More than two in five (42%) consumers would like to have more details about the **regenerative farming practices displayed on the packaging**.

Page 29

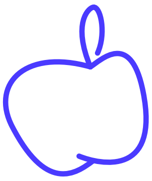
One in two (47%) people **associate regenerative farming with the word 'sustainable'**.

Page 30



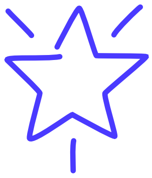
Consumers mostly associate regenerative farming with **plant-based ingredients**.

Page 33



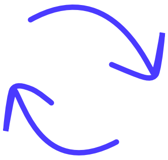
Less than a third of people identified **dairy** (28%) or **meat & poultry** (27%) as potential regenerative products.

Page 33



The main motivations for consumers who buy regenerative products are the **environmental impact** (29%, **health benefits** (24%) as well as the **taste and quality** (22%).

Page 38



With the right **loyalty scheme**, more than four in five (85%) consumers would be open to **switching from their normal brand to a regenerative version**, with a quarter (25%) definitely doing so.

Page 44

Consumer awareness and understanding

Although more than two-thirds (67%) of consumers have heard of the term 'regenerative farming', most of them (64% of the group, or 43% overall) don't know what it actually means. This suggests that some education is needed to help guide consumers.

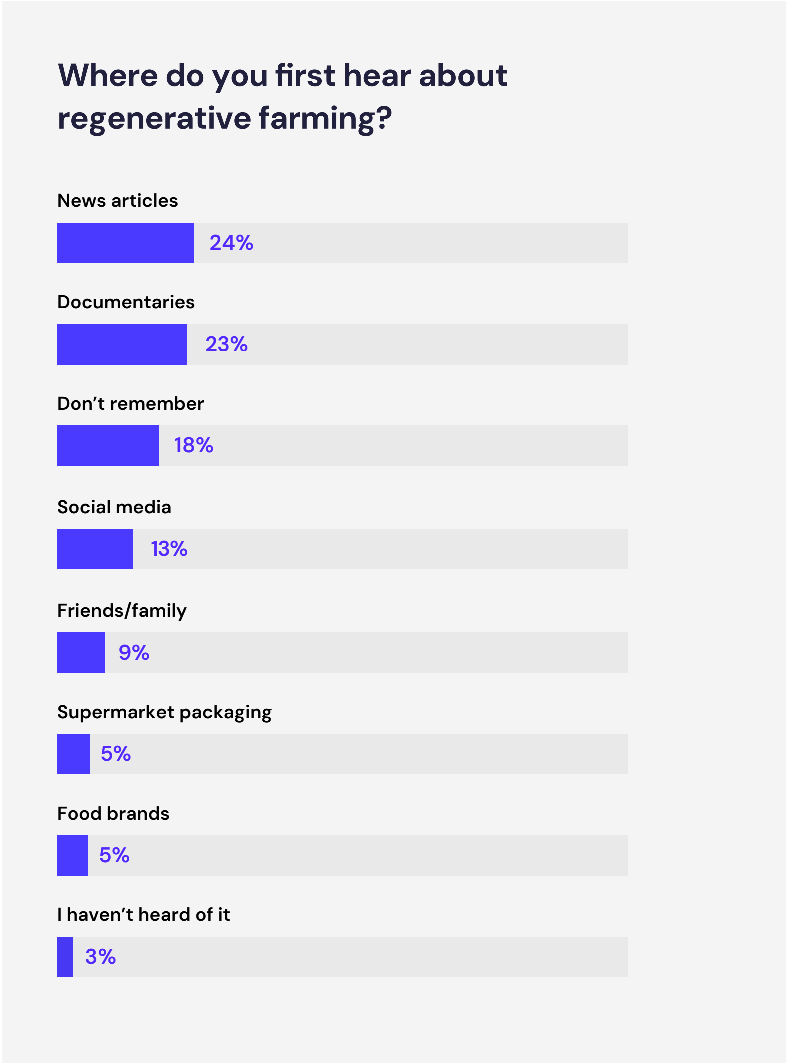
There is an appetite to learn more, even for those who have never heard of the term. Over a quarter (30%) of today's consumers have never heard of regenerative farming. However, within this group, seven in ten (70%) would like to know more (21% out of 30%).

And men aged between 35 and 44 are 1.6x more likely to claim that they know what the term means (39% out of 24%)

The people who are—or claim to be—already familiar with regenerative farming were most likely to learn about it from news articles (24%) or documentaries (23%). Generally, the older the consumers were, the more likely they were to select these options. Consumers who are 65 years or older are six times more likely to learn from news articles than 25 to 34-year-olds (38% vs 7%).

By contrast, just under a third (29%) of the 25 to 34 age group learned from social media, making them 16 times more likely to use this channel, than the 65+ group (29% vs 2%).

The number of people who learned about regenerative farming from supermarket packaging and food brands was nascent, with only around one in twenty selecting this option (6% and 5%, respectively). This could imply that packaging does not contain enough educational material about regenerative farming or that consumers don't read it.



Perceptions of people familiar with the term

Nearly three in five (57%) consumers familiar with regenerative farming have looked into buying the products, and most of them (39%) went on to purchase something. This implies that more information can mean more sales. For brands, this could be an incentive to boost education.

Younger consumers (aged 25 to 34) tend to be more engaged and proactive around the topic. After researching regenerative farming, two in three (68%) bought a product. By contrast, older consumers (over 45) were more passive, with one in two (50%) not looking any further into it.

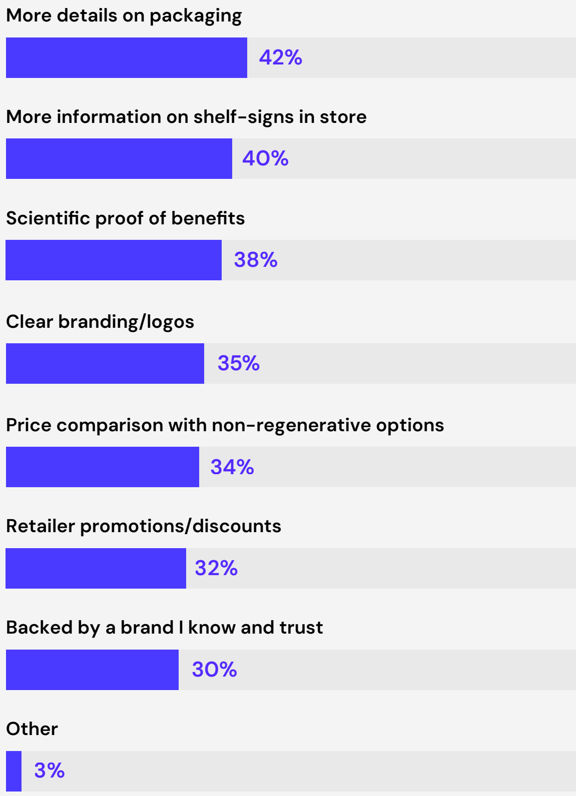
Sticking with the consumers who are familiar with regenerative products, we asked what would help them feel more confident about buying them. Overall, they revealed that they would value **clearer information** and **better visibility**.

More than two in five (42%) consumers would like more details about the regenerative farming practices displayed on the packaging. This could be an easy win for brands to appeal to this group. Almost two in five (40%) would value signage on the shelves in stores too. Clearer branding and logos would also help to persuade over a third (38%) of this group.

Hitting a little closer to consumers' personal values and wallets, around a third of consumers would like to see scientific proof of the benefits of the regenerative product (38%), as well as price comparison against the non-regenerative options (34%). Providing a breakdown of how regenerative products support the planet and better health can help consumers decide if it is worth investing in.

Other confidence boosters include retailer promotions (32%) and endorsement from a trusted brand (30%).

What information would help you feel more confident choosing regenerative products?



Overall consumer associations and perceptions

Zooming back out to the wider population, we asked consumers what words they associated with "regenerative farming", selecting all that applied. **With one in two (48%) votes, "sustainable" was the top choice**. Men between 55 and 64 were the most likely to select this option, with almost three in five (58%) voting for this word.

"Better for the environment" was another top choice, garnering around two in five votes (42%). This was the most selected word for all over-45s, with men aged 45 to 54 picking this as their top choice (53% vs an average 42%).

With much fewer votes, words like "organic", "healthier", and "higher quality" resonated somewhat for around a quarter of consumers, collecting 26%, 21% and 18% of votes, respectively.

Reassuringly for brands, **only a small portion (14%) of consumers associated regenerative farming with the word "expensive"**. However, as we saw from the research above, consumers may become more interested in seeing a cost comparison against non-regenerative items once they become more familiar with the term.

Two in five (40%) consumers identify regenerative methods as the most environmentally friendly type of farming, making it the most common perception. This shows that a foundational level of education already exists for a portion of consumers, potentially making it easier for brands to build on. **Only one in five (21%) think that organic farming beats regenerative farming**, and just one in ten (11%) think that conventional farming is best for the planet.

However, despite these promising findings, **there is an education gap**. Over a quarter (28%) of consumers admitted that they didn't know the best for the planet out of regenerative, organic or conventional farming. Combined with the 32% of people who were unsure, almost three in five (60%) of the population lack basic education on the benefits of regenerative farming. For brands that produce these products, addressing the information gap could be critical.

In line with the lower education levels, **most consumers do not associate regenerative farming with any specific brands**. Many expressed a lack of awareness, with responses such as "I have no idea what brands use this farming."

However, a few consumers were able to name sustainable and regenerative companies. The most frequently mentioned was Yeo Valley. Others included Hodmedod's, Riverford, Daylesford and First Milk, which all have links to sustainable and organic farming. Some consumers mentioned farms, with Gentle Farming, Fern Hill Farm, Hogshaw Hill Farm, Taw River Dairy, and Terrafarmer coming up.

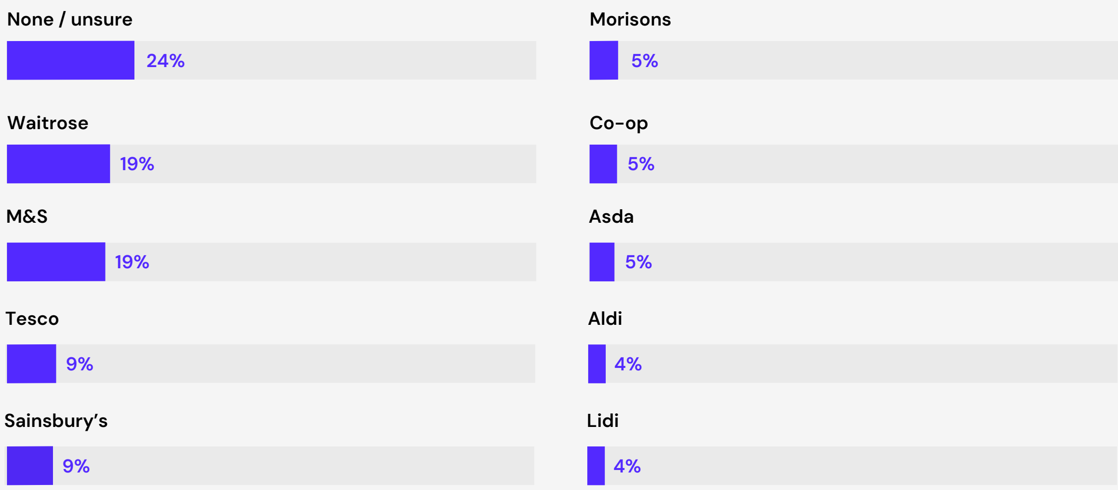
Ethical food brands that focus more on fairtrade, social justice, and organic methods were also mentioned. People Tree, Divine Chocolate, Innocent, and Tony's Chocolonely were often cited.

However, some of the brands listed by consumers have unclear or nascent connections to regenerative farming. These include McCain, Birds Eye, Green Giant, Tesco, Co-Op and Morrisons. This could indicate a further lack of awareness or understanding. A few fashion brands, such as Armed Angels, Moonshot Snacks, Timberland, Vans and The North Face, were also referenced.

Consumers mostly associate regenerative farming with premium supermarkets and less with budget versions. For example, they are five times more likely to think that Waitrose stocks these products than Aldi or Lidl (20% vs 4%).

These results suggest that premium retailers like Waitrose and M&S have a strong sustainability association, while the big four and discounted supermarkets may need to build clearer associations with regenerative farming.

Which supermarket do you think is most likely to stock products made using regenerative farming?



Regenerative ingredients and product associations

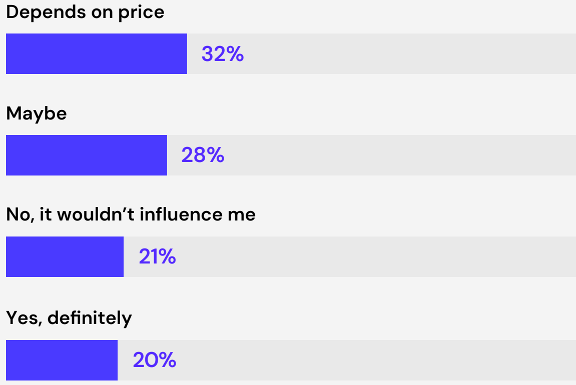
We asked consumers to identify products that can come from regenerative farming. Vegetables, grains and fruit were the most popular selections, gathering 50%, 45% and 37% of votes, respectively. This shows that consumers widely associate regenerative farming with plant-based ingredients.

However, awareness gaps started to appear when it came to animal products. Less than a third of people identified dairy (28%) or meat & poultry (28%). This could be because they associate regenerative farming with something which “grows” from the ground rather than livestock which can be raised. It could also be because of the perceived cross-over between a vegan diet and a healthier planet.

More than a quarter (27%) of respondents indicated they were unsure. This further reinforces the finding that awareness, education and understanding levels remain low. Four in five (79%) consumers would be open to buying a product if it stated it was made with regenerative ingredients, with one in five (20%) purchasing it. The remaining group were a lot more cautious, with opinions split between “maybe" (28%) and “depends on the price" (32%).

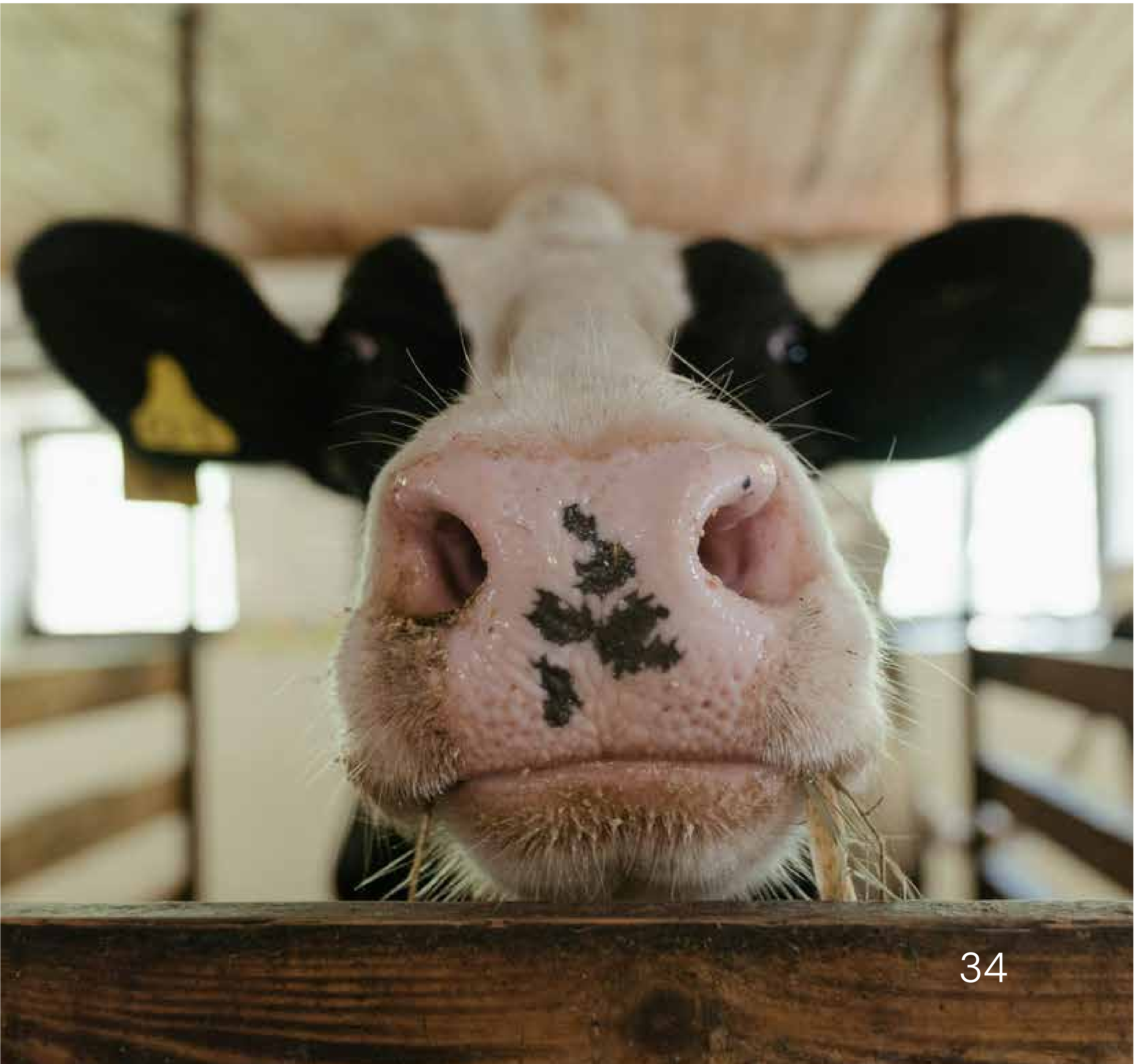
Price awareness seems to be closely linked to regenerative farming. This is especially true for the 45 to 54 age group, who were 1.2x more likely to decide based on price than the average population (38% vs 32%). Conversely, younger consumers (25-44) were more likely to say “yes, definitely” (30%), highlighting a stronger appeal among younger demographics.

Would you be more likely to purchase a product if it stated that it was made with regenerative ingredients?



To unlock consumer associations around regenerative farming, we asked what effect they feel it has. One-third (33%) of respondents cited the lower environmental impact, making it the most popular choice. This could be quite an encouraging base for brands to build on.

However, in second place came the subject of price again, which is a consistent sticking point for consumers. A quarter (24%) of respondents voted that higher prices would have the most significant impact - more than one in ten (14%) thought regenerative farming didn't make a difference.



Low awareness of nutritional benefits

Many fewer consumers linked regenerative farming to quality and nutrition. Around one in ten felt that it would lead to better quality produce (13%), more nutrition (9%) or better tastes (8%).

This indicates that most shoppers view regenerative farming as a purely environmental initiative, offering little direct benefits to them personally. As brands seek to educate consumers, including some information about the health, taste and quality benefits could ignite more interest.

Focusing on the handful of consumers who feel that regenerative farming leads to more nutritious food, we asked them why they feel this is. The most popular answer was that more nutrients in the soil would lead to more nutrients in the food, with two in five (41%) voting for this. More than a third (37%) of consumers felt that the more natural growing conditions would lead to more nutrition. And over a quarter (29%) credited less pesticide use. While all these answers are correct, the lower scores indicate a lack of confidence in the subject.

Furthermore, nearly a quarter (23%) admitted that they felt regenerative foods were more nutritious because of a general perception rather than knowing the process. This further emphasises the need for strong education backed by science

In general, consumers are in favour of displaying “regenerative farming” on packaging, with more than half (57%) having a positive perception. However, a significant portion remains uncertain, signalling a need for more education on what regenerative farming actually means for consumers.

Well-established brands would have an advantage in the regenerative farming industry, as two in five (43%) consumers say they would trust a major brand over a specialist one. Just under a sixth of consumers (15%) would trust a fully regenerative brand more. And two in five (43%) would have no preference at all.

Digging a little deeper, we asked the respondents who would trust a major brand more for further details. The majority of this group (45%) said that it's simply familiarity with the brand that makes them feel more at ease. Other factors that came up included the perception of better-quality control (33% of votes), more affordable pricing (29%), perceived expertise (23%) and wider availability (22%).

This suggests trust is driven by brand recognition and accessibility, meaning new regenerative brands may need retailer partnerships or strong marketing efforts to compete.

Reinforcing this theory, four in five (80%) consumers confirmed that they would trust a fully regenerative brand more if a major retailer endorsed it. Within this group, around half (49% of the group - or 39% overall) would trust it much more.

Younger consumers aged 25 to 34 years old are the most susceptible to this. They are 1.5x more likely to trust a retail endorsement, much more than the overall population average. (59% vs 39%).

Consumer behaviour and purchase intent

The majority of consumers (40%) are not sure if they have ever purchased a product made with regenerative ingredients. This speaks, again, to a strong lack of awareness in the market. The 45 to 54 age group is the most unsure, with one in two (49%) unable to answer.

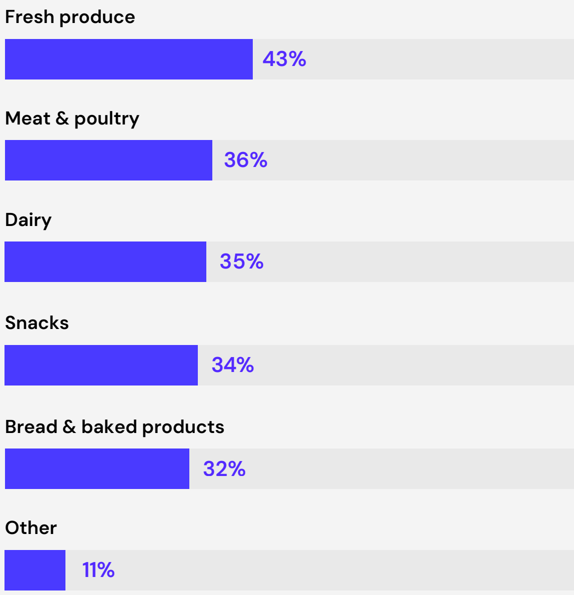
More than a third (36%) of consumers believe they have never bought a regenerative farming product. Older respondents, aged over 55, were the most confident in this, with more than two in five (44%) answering "No".

Less than a quarter (24%) of consumers have knowingly purchased a product made with regenerative ingredients. Younger consumers, aged between 25 and 34, are the most likely to have bought regenerative products, with almost two in five (38%) confirming a purchase.

For this group, more than two in five (43%) buy fresh produce, making it the most common regenerative purchase. Meat & poultry, dairy, snacks, bread and baked goods were also popular, accumulating 36%, 35%, 34% and 32% of votes, respectively.

This indicates that fresh and staple food items are the most recognised in the regenerative category. It could also imply that processed or convenience foods remain less associated with regenerative farming.

Which regenerative product(s) have you purchased?

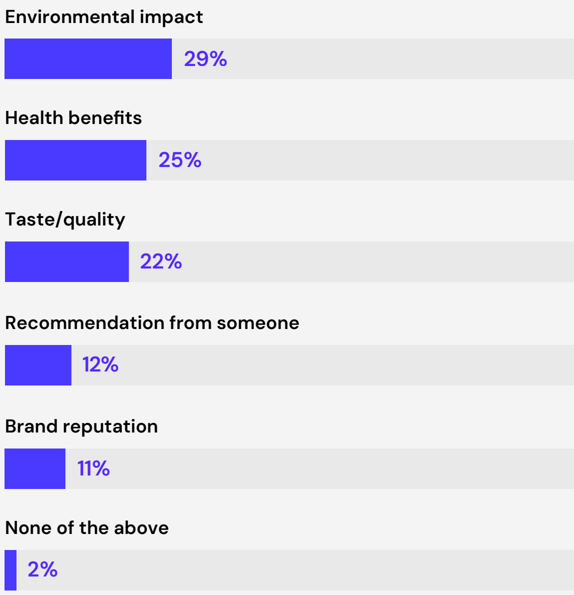


Top motivations to buy

The main motivations for consumers who buy regenerative products are the environmental impact (29%), health benefits (25%), and the taste and quality (22%). Interestingly, there were some demographic differences. Consumers over 55 were 1.6x more likely to prioritise the environmental impact (46% vs 29%). People in the 45 to 55 years tended to lean towards taste & quality (31% vs 22%). And the youngest consumers, aged 18 to 24, were 1.7x more likely to be motivated by the health benefits.

This suggests sustainability messaging resonates more with older consumers, while younger demographics focus on personal health benefits.

What was the main reason you chose a product with regenerative ingredients?



In a free-text survey, our research found that most consumers would be willing to repurchase regenerative products. The main reasons for this focus on the environmental benefits, nutritional value, superior taste quality, and ethical appeal.

> **I would buy it because it tastes nice and sometimes the flavour is richer than normal.**

> **They are more naturally produced and therefore more nutritious.**

> **It helps the environment.**

However, barriers remain. Despite the mostly positive feedback, there are still concerns about the price, which are difficult to shake.

> **Probably not, as they are too expensive.**

> **I'm not sure, maybe if it was affordable.**

Barriers to purchase

Turning to consumers who have not purchased a regenerative product, the main barrier was a lack of awareness. Almost a third of respondents (32%) cited this as the core reason, suggesting that it's also possible they could have unknowingly purchased one.

In a similar thread, a quarter of respondents (25%) claim to have never seen a regenerative product available, while one in ten (11%) said they wouldn't know where to find them.

These results indicate that education, visibility, and accessibility are the biggest obstacles to consumer adoption. These three factors account for two-thirds (67%) of the barriers.

However, the thorny issue of price also came up as a block for one in ten (11%) consumers. A similar number (9%) also cited that they felt sceptical about the products, which turned them away from purchasing.

Fortunately, consumers who have never purchased regenerative products would be open to trying them out. The most compelling incentive would be a supermarket promotion, with two in five (41%) respondents voting for this. For over-55s, this rises to almost one in two (47%). Discounts and promotions combine some of the other influential factors unpacked earlier in this paper, including price sensitivity, visibility and retail familiarity.

Just under a third (30%) would try out the products if they were more educated on the benefits. This resonates especially with consumers aged under 34, who were 1.6x more likely to vote for this option. One in five (20%) would be more likely to pick up a product if clearer labelling existed.

Finding regenerative products

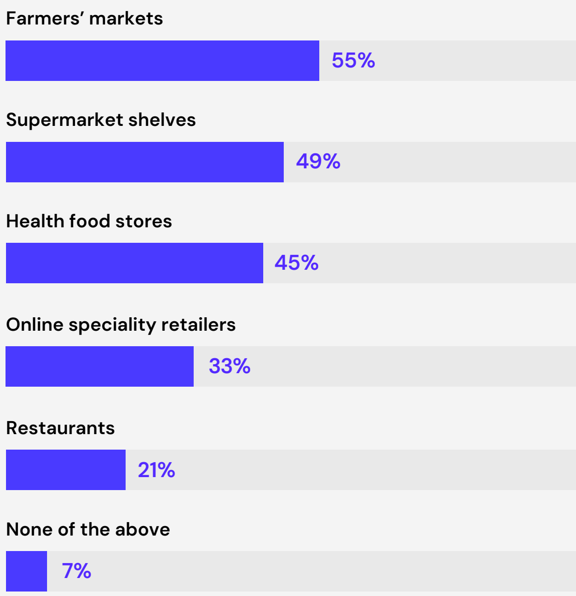
Drawing on the subject of restaurants, we asked consumers if they would be more inclined to choose a restaurant or takeaway that highlights regenerative ingredients. The response was pretty lukewarm, with two in five (40%) selecting “Maybe, if it was an option” and more than a third (38%) saying that it wouldn't influence them.

However, more than one in five (22%) were strongly in support and would actively seek it out. This suggests restaurants promoting regenerative ingredients may appeal to a niche but growing audience.

Almost half (45%) of consumers view restaurants that promote regenerative ingredients as better for the environment. There are a range of other perception benefits that come with this, too. For example, over a quarter of consumers (27%) would think that it means the restaurant offers higher-quality food, and nearly one in five (19%) assume that the meals would be more nutritious.

However, this messaging comes with one potential drawback. Nearly a third (31%) of consumers think that this means the menu will be more expensive. To navigate this, restaurants should manage price perception and communicate additional benefits like taste and nutrition.

Where would you expect to find regenerative products?



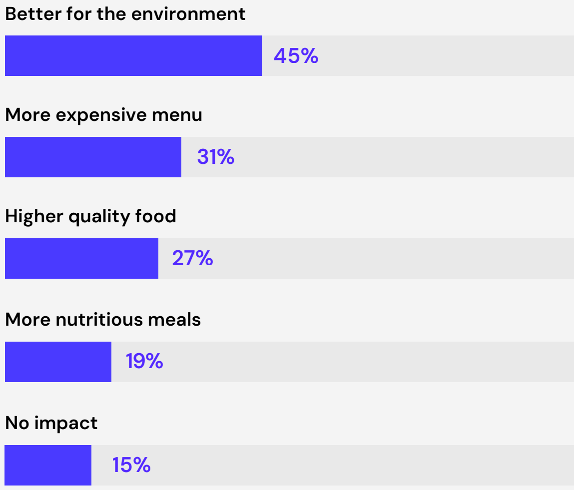
Most consumers want to buy fresh produce, which is the most regenerative product. More than half (54%) of consumers voted for this. This could be because fresh produce is most strongly associated with regenerative farming. Or, as price perception is a barrier, it could seem like the most cost-effective choice.

Meat and poultry came in second place, with two in five votes (39%), with dairy following closely behind (37%). This indicates that consumers seem to be more aligned with purchasing unprocessed or minimally processed foods, which connect more directly to nature.

While less popular, more than one in five consumers would still be interested in buying regenerative processed foods. The most desirable is bread, gathering 31% of votes. Ready meals and snacks both collected 20%.

Educating consumers about the benefits of regenerative agriculture within processed and convenience foods could help to boost demand.

If a restaurant promoted using regenerative ingredients, what would you assume?



Price sensitivity and willingness to pay

Price sensitivity is a recurring pinch point for consumers, with many perceiving regenerative products as being more or too expensive. More than a third would not be willing to pay extra (37%). However, a majority (62%) indicated that they may be open to paying a premium if the benefits were clear.

Price promotions

We asked the people who would not pay more if they would buy a regenerative product at the same price as conventional versions. In this case, more than four in five (83%) would consider putting a regenerative product in their shopping basket, and more than one in five (22%) “definitely" would.

Brand could consider in-store promotions to bring this group on board and help persuade the majority (62%) of price-sensitive “maybe” consumers to try regenerative products. Our data suggests that when regenerative products are the same price as conventional versions, people are more inclined to buy them.

Women under the age of 34 seem to be the most price-sensitive and willing to switch over if it is affordable. They are 1.5x more likely to switch to a regenerative product if it has the same price tag as a conventional version (33% vs 22%). They're also less uncertain about this than average (54% vs 62%) and less loyal to conventional products (13% vs 17%).

Compared to the overall population, cost-sensitive consumers are much less likely to buy regenerative products, even if they cost the same (22% vs 45%). This implies that there are other blocks for this group. It could be that they distrust the prices will remain low and wouldn't like to enjoy something they cannot buy next time. Or it could be that they are less aware of the benefits of regenerative food.

Price-sensitive consumers are also 1.6x (62% vs 39%) more likely to hesitate when picking conventional and regenerative products. This could indicate some glimmers of curiosity, which opens up brand education opportunities. With consumers debating between products at the supermarket shelves, signage or labelling about the benefits of regenerative technique could help to sway opinions.

Loyalty schemes

Loyalty schemes have the potential to encourage consumers across all price sensitivity levels - albeit to different extents. Among the most price-sensitive group (who will not pay anything extra for regenerative products), over one in ten (12%) would change their mind if they could get loyalty rewards. Men under 25 are more than 2.7x more likely to switch for this reason.

Three in five (60%) of the most price-sensitive consumers would think about it, showing that they could warm up to the idea.

On the other end of the spectrum, loyalty rewards would be very popular for the quarter (25%) of consumers who are already open to regenerative products. One in two (49%) of this group agree that they would likely switch with the right loyalty incentives.

Discounts for buying regenerative products regularly would be most effective for consumers under the age of 34. This demographic is 1.2x more likely to move to regenerative foods because of loyalty schemes compared to the population average (61% vs 49%).

Two in five (40%) of the other consumers open to buying regenerative products would also be influenced by loyalty schemes but would only switch if the savings were sufficient.

Affordability

Over a third (38%) of UK consumers would not be prepared to pay extra for any regenerative product.

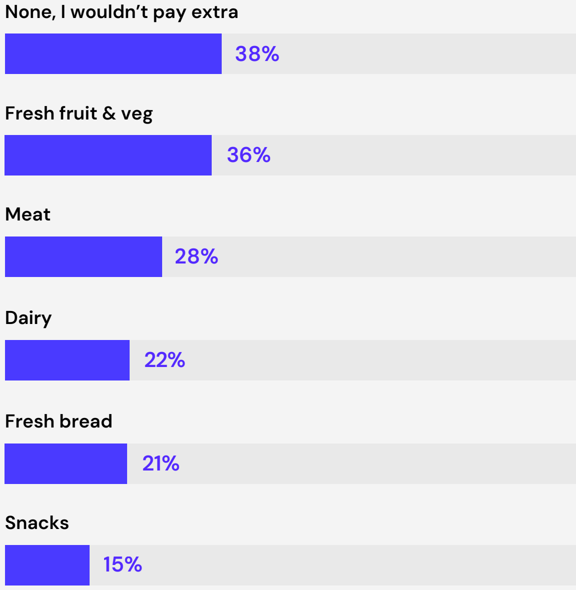
However, a similar proportion of people (36%) are open to paying more for fresh fruit and vegetables. For women aged between 25 and 34, this rises to more than two in five (43%). Men aged 35 and 44 are also more likely to pay extra (42%) for regenerative fruit and vegetables.

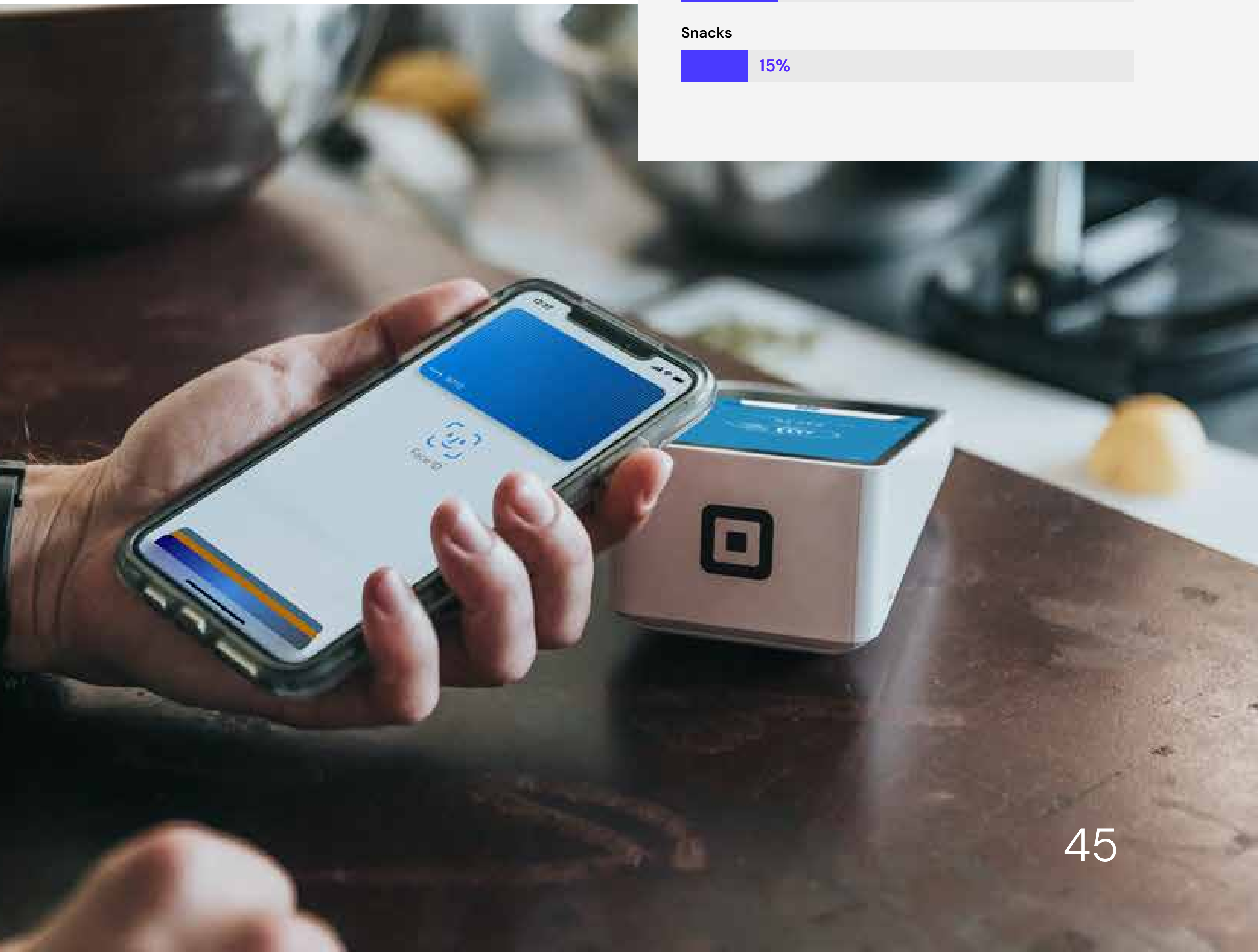
Just over a quarter of people (28%) would spend more on meat reared on regenerative farms. Women under the age of 24 are 1.4x more likely to select this option (38% vs 28%).

As planet-first trends like veganism take hold, especially among younger demographic groups, regenerative farming could be a potential middle-ground for concerned consumers.

Only around one in five (22% and 21%) would be prepared to spend on regenerative dairy and fresh bread. This could indicate a lack of education. Or a desire to spend only on the most unprocessed products. Snacks fared even worse, garnering just 15% of votes.

Which of these products would you be most willing to pay extra for if made with regenerative ingredients?





Brand loyalty

Significantly, more than four in five (85%) consumers would be open to switching from their normal brand to a regenerative, with a quarter (25%) “definitely” doing so.

However, for most (71% - or 60% overall) of this group, some strings are attached. They would only consider it if the quality was the same as their current brand. This should be reassuring for regenerative retailers, as these products tend to offer superior nutritional and environmental benefits. However, to stay ahead, they should ensure that the taste and consumer experience remain at least as good as the typical brands.

Generally, consumers aged between 45 and 55 seem the most reluctant to change. Under-24s are more than twice as likely to switch, compared to the 45 to 55 range, (43% vs 20%).

Exploring brand familiarity deeper, we asked if consumers would prefer to buy regenerative products from an existing brand or a specialist regenerative one. More than two in five (42%) opted for an existing brand, making it the most popular option. Only one in four (26%) would be prepared to try a specialist version, led by younger consumers. Under-34s are 1.6x more likely to try out a specialist regenerative brand, indicating a potential opportunity for market entrants targeting younger demographics.

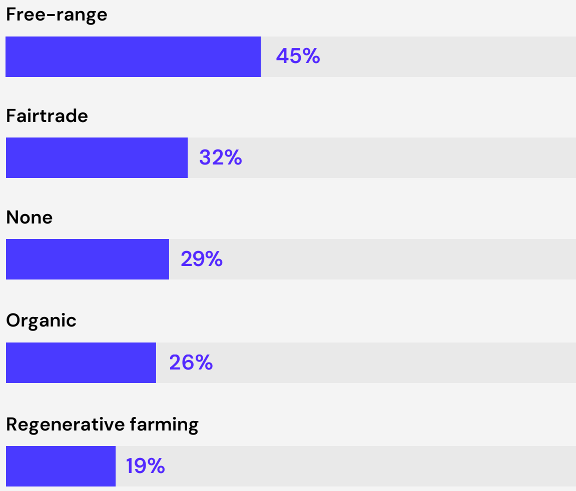
Sustainability and ethical shopping

Consumers prioritise well-established sustainability labels over newer or less familiar ones. The top choices are free-range, fair trade and organic, collecting 45%, 32% and 26% of votes, respectively.

Less than one in five consumers (19%) actively look for "regenerative farming" labels, indicating that awareness remains low compared to other sustainability messaging. Additionally, more than a quarter of shoppers (29%) stated they do not look for sustainability labels. This could suggest that price and convenience often take priority over sustainability considerations.

As they navigate supermarkets, only one in five (21%) consumers actively seek sustainable products and brands while they shop. The majority (47%) of consumers consider sustainability somewhat, but price is their most important concern. And, around a third of people (32%) do not prioritise sustainability at all when shopping.

Which of these sustainability labels do you look for then shopping?



Sustainability seekers

Focusing on the respondents who actively seek out sustainability, there is a clear cross-over with financial incentives, too. Nearly three in five (59%) consumers avoid food waste, more than half (52%) are reducing their plastic use, and over two in five (44% and 43%, respectively) are buying British-grown or locally sourced foods. The data indicates that the most successful sustainable initiatives will be those that also save consumers money.

This approach could work especially well with consumers over the age of 55. Our data shows that this group is 1.4x more likely to reduce plastic use and 1.3x more likely to avoid food waste (78% vs 58%).

Although we might expect this group to be more inclined to buy products labelled as “B Corp” or “Fairtrade", the take-up was underwhelming (at 23% and 35%). This could imply some scepticism toward corporate sustainability claims.

Regenerative farming may alleviate some of the mistrust and scepticism surrounding brands’ sustainability claims. Four in five (79%) consumers would be more likely to trust these claims from a brand that uses regenerative farming. One in three (34%) would be “much more likely," driven by consumers aged 25 to 34 (50% vs. 34% average).

Sustainability shunners

Within the group that does not prioritise sustainability when food shopping, more than one in three (35%) reveal that this is because the price is too high for them. This could imply that promotional offers or cost-saving initiatives could encourage these consumers to opt for more sustainable products.

Investigating further, we found that three quarters (76%) of this sub-group would consider buying regenerative products if they were priced the same as non-regenerative ones. Younger consumers (under 34) are the most willing to choose regenerative products, with a higher interest in sustainability when affordability is not an issue.

As well as price, there were some other reasons cited for shunning sustainability in supermarkets. These included prioritising convenience, scepticism and confusion about what is actually making an impact. But these other factors tended to be spread out, with less than one in five people voting for them.

Interestingly, while consumers under the age of 35 are more open to trying new brands, they are less willing to sacrifice convenience. This suggests that younger consumers could be tempted by sustainable products that require less effort than conventional products.

Overall consumer outlook

The majority (58%) of consumers believe that regenerative farming will become more important in the future. However, nearly two in five (38%) are unsure, suggesting that many consumers lack enough knowledge to form an opinion.

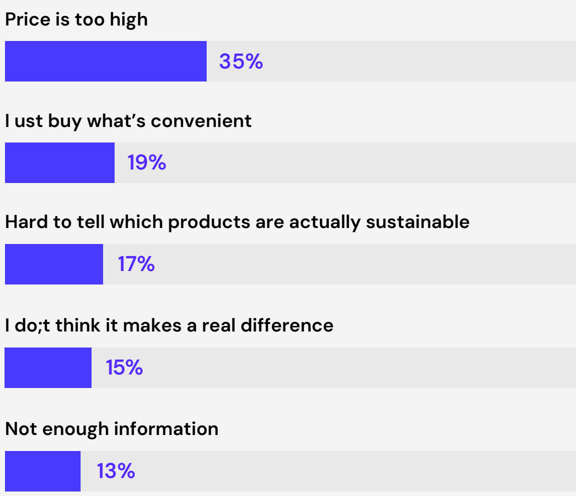
Consumers have a wide range of different motivations for purchasing regenerative products. However, tellingly, the one factor that resonated the most was the need for a lower price. More than a quarter (27%) voted that this would convince them to make the switch.

In second position, one in five (20%) would be motivated to buy regenerative products because of the clean environmental benefits. A similar proportion (17%) are attracted to the superior health benefits.

The data confirms that price remains the dominant factor, but communicating health and environmental benefits is also crucial for engagement.

When it comes to marketing for regenerative products, the messaging which most resonates with consumers is, “better for the planet", with 31% of votes. “Support British farmers” and “healthier and more nutritious” also picked up 24% and 23% of votes, respectively. Men between the ages of 25 and 34 were 1.4x more drawn to health-related claims (33% vs 23%).

What is the biggest reason you don’t prioritise sustainability in food shopping?



How brands are approaching regenerative farming

The burgeoning regenerative farming industry is spearheaded by challenger brands and premium retailers in the UK. In this section, we take a deeper look at two of them, Wildfarmed and Waitrose, analysing consumer perception, awareness and suggestions for improvement.

Case study

Building equity among high-value shoppers

Wildfarmed may be a relatively new name to many, but among those who are aware of it, the perception is impressively strong. Nearly half of the consumers (47%) who know Wildfarmed describe it as high-quality, while 44% consider it trustworthy, and 42% associate it with sustainability - three attributes critical to long-term brand strength in today's values-led marketplace.

A regenerative brand with strong foundations and room to grow

As regenerative farming continues to shape the future of sustainable food systems in the UK, Wildfarmed stands out as a pioneering brand in the space.

While overall awareness is still developing, our research reveals that Wildfarmed enjoys strong positive associations among those who know it and is already gaining momentum among younger, sustainability-minded shoppers.

With clear strengths and a passionate early adopter base, Wildfarmed is well-positioned to lead this next wave of conscious consumption - especially if supported by a few strategic next steps.

Notably, almost 30% (29%) also describe Wildfarmed as innovative, underlining its position not just as a sustainable choice, but as a forward-thinking brand. These positive associations suggest a brand that, while still scaling, already holds high levels of consumer trust and appeal in its niche.

Just 11% of respondents had no clear opinion of the brand - indicating that when consumers do encounter Wildfarmed, it leaves a strong and lasting impression.

Strong momentum among premium and purpose-led shoppers

Wildfarmed's reach is particularly strong within premium, environmentally conscious audiences - exactly the kind of early adopters who help establish cultural relevance and word-of-mouth credibility.

Consumers who actively seek out sustainable products and are willing to pay more for them are twice as likely to be familiar with Wildfarmed (37% compared to 19%). This shows that the brand is already connecting with shoppers who are most aligned with its mission and values.

Age also plays a role: younger consumers aged 18 to 44 are significantly more familiar with the brand, with 32% aware of Wildfarmed, compared to 19% of those aged 45 and up. This generational split signals an exciting opportunity for long-term loyalty and advocacy among a new generation of food-conscious consumers.

In terms of where these shoppers are found, Wildfarmed has particularly strong familiarity among consumers of Whole Foods (55%), Costco (39%), Booths (33%) and Waitrose (34%) - a strong showing across premium and experience-driven retailers.

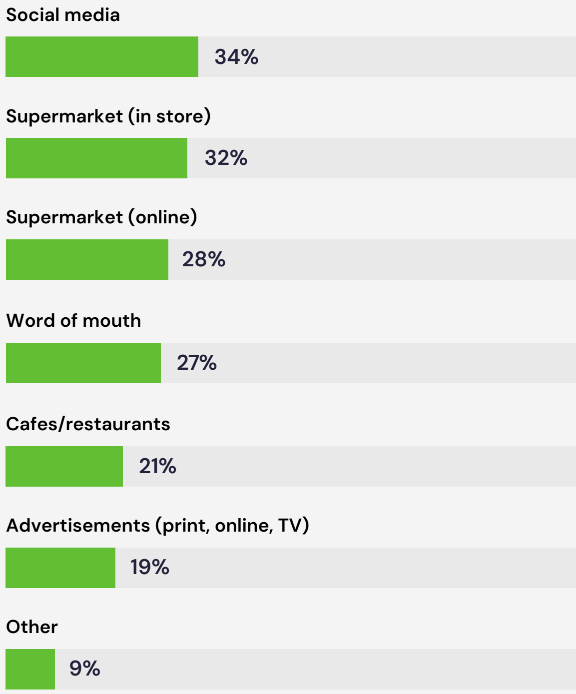
Social-first discovery and organic buzz

For a challenger brand, the fact that one in three consumers (34%) became aware of Wildfarmed through social media is a key strength. This shows that digital and content-led awareness is working – and most importantly, reaching the right audience.

Supermarket presence is also a meaningful touchpoint, with 32% citing in-store visibility as where they saw the brand, closely followed by 29% who encountered Wildfarmed via online retailers. The combination of physical and digital visibility is helping to slowly build brand presence.

Word-of-mouth is another positive indicator, with 27% saying they heard about Wildfarmed from someone else - suggesting that the brand is generating interest and recommendation organically. And while not everyone knows the brand yet, those who do are talking about it.

Where have you seen or heard about Wildfarmed?



Tapping Into food culture through dining out

The presence of Wildfarmed in cafes and restaurants may be one of its most underutilised yet promising strengths. When asked how it would affect their perception to see Wildfarmed used in dine out settings, 60% of consumers said it would create a more positive impression of the brand.

This translates into real purchasing potential, too: 41% said it would make them more curious to try Wildfarmed, and nearly one in five (19%) said it would increase their trust in the brand.

Even more importantly, 23% of consumers said that if they saw Wildfarmed in a café or restaurant, they would actively look for it in supermarkets afterward - and nearly half (47%) would consider doing so if they liked the product. These findings point to the power of experiential trial and the potential halo effect foodservice partnerships could have on in-store sales.

Barriers reflect awareness, not product perception

While Wildfarmed has an excellent foundation, the research also reveals opportunities to expand its reach by addressing a few common barriers. The most common reason for not purchasing a Wildfarmed product was simply a lack of knowledge: 35% of consumers who saw the brand in store but didn't buy it said it was because they didn't know enough about it.

This insight is promising - it suggests that improving education and visibility, rather than repositioning the product itself, is the key to unlocking growth.

The perception of a high price is also a factor, cited by 18% of non-buyers. However, this aligns with wider research around regenerative products and premium positioning. Communicating the "why" behind the price could help overcome this.

Interestingly, 17% of people said they didn't understand the benefits of Wildfarmed's products, which again highlights the opportunity to invest in further, more accessible messaging - especially in-store and on-pack.

Older consumers (aged 55+) were the most likely to say they didn't know enough about the brand, with 67% citing this as the reason they hadn't purchased. In contrast, younger audiences are more brand-loyal, with 16% simply preferring their usual options – suggesting a different challenge for younger shoppers: encouraging trial and switching behaviour.

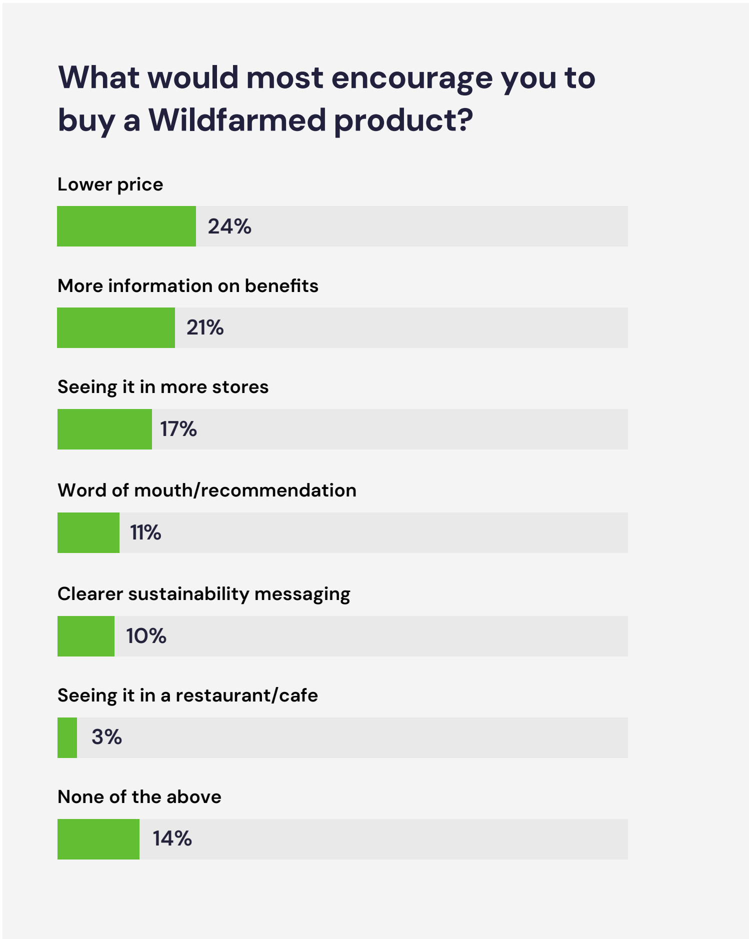
Opportunities for growth: Price, placement, and packaging

So how do we unlock the next stage of growth for Wildfarmed? The data points to three actionable strategies.

First, 24% of consumers said they would be more likely to purchase Wildfarmed if prices were lowered or if the brand ran promotions that made products more accessible.

Second, 21% said they would be encouraged by clearer communication of environmental and health benefits – especially on packaging.

And third, 17% of shoppers said they'd be more likely to purchase if Wildfarmed was available in more stores. That access – combined with stronger in-store storytelling – could drive significant increases in consideration and trial.



What consumers want to know about regenerative farming

To help bridge the information gap, we asked consumers what they'd like to know about regenerative farming and Wildfarmed's role in it. Seven recurring themes emerged, pointing to where education efforts can be focused.

Understanding the Basics

Many consumers don't yet know what regenerative farming means and are asking for simple, clear definitions.

Environmental & Health Impact

There's strong curiosity around how regenerative methods improve soil, biodiversity, and personal health.

Impact on Farmers

People want to understand how British farmers are affected by this approach.

Cost & Practicality

Is regenerative food worth the price? Is this a long-term solution or a trend?

Comparisons to Conventional Farming

Consumers want side-by-side comparisons for nutrition, environmental impact, and taste.

Accessibility & Communication

Many are looking for clearer messaging in supermarkets, on TV, and across the press.

Disinterest & Scepticism

A small segment is uninterested - but these are in the minority.

Conclusion: A brand with vision, trust, and room to scale

Wildfarmed is already resonating with the right audiences - premium shoppers, younger consumers, and sustainability advocates. The brand's strong associations with quality, trust, and innovation, along with its early traction via social media and word-of-mouth, provide a powerful foundation for growth.

Now, the opportunity is clear: broaden awareness through targeted education, expand availability, and ensure that product messaging connects emotionally and clearly at the point of purchase.

With these actions, Wildfarmed can continue to lead the regenerative conversation - and bring even more consumers along for the journey.

Waitrose

‘Nature in Mind: A thoughtful step towards regenerative shopping

As one of the UK’s most responsible and trusted premium retailers, Waitrose continues to lead the way in terms of sustainability by aligning its values with those of its consumers. Its recent collaboration with the Ellen MacArthur Foundation and the launch of the Nature in Mind campaign signal a growing ambition to bring regenerative thinking into the mainstream.

Our research shows that while awareness of the campaign is still building, the message resonates with core Waitrose consumers - particularly younger shoppers and those seeking natural, high-quality products. With greater visibility and clearer communication, Nature in Mind has the potential to become a defining marker of Waitrose’s sustainability leadership.

Early awareness building among key demographics

Among regular Waitrose shoppers, 29% said they had noticed the Nature in Mind branding in-store. While this figure reflects an opportunity to improve visibility, awareness is significantly higher in some groups: men aged 25–44 are 2.3 times more likely to notice the campaign (66% vs 29%) - a strong indicator that the message is landing with a younger, engaged male demographic.

In contrast, shoppers aged 45 and over are less likely to have noticed the campaign, with 63% of this group reporting they had not seen it. This may be driven by more habitual shopping behaviours, with older consumers moving quickly through stores, sticking to known products, or being more cost-conscious. However, this also presents an opportunity to make the campaign more noticeable through targeted interventions at shelf or through consumer communications.

In-store displays are the most memorable touchpoint

For those who had noticed the Nature in Mind campaign, in-store displays and stands were the most recalled activation, cited by 44% of respondents. Interestingly, this format performed especially well among older shoppers - over-45s were 1.2x more likely to remember it (54% vs 44%), and men over 65 were even more engaged (67%).

Social media played a significant role: 29% of those aware of the campaign said they'd seen it online, rising to 57% for men aged 35-44. And in-store leaflets were particularly effective among men aged 35-44, who were 3.2x more likely to remember seeing one (83%).

These results highlight the importance of a multichannel approach - balancing traditional in-store tactics with targeted digital messaging to reach both established and emerging audiences.

Natural, sustainable and high-quality: A resonant message

Among those who noticed it, the Nature in Mind campaign generated highly positive associations. Consumers repeatedly described it using phrases like “natural products,” “no artificial additives,” and “environmentally friendly” - reinforcing its alignment with Waitrose’s brand values and consumer expectations.

Sustainability was the most dominant theme, closely followed by health and wellbeing. One shopper described the range as “high quality, very healthy for me and my family,” while another called it “natural and kind. I like it”.

While a small number of consumers - especially women - felt the branding could be more specific or less “greenwashy,” others were reassured by Waitrose’s reputation, trusting the campaign because it came from a brand known for quality and care. As one respondent put it: “I expect Waitrose to be on the case when it comes to their impact on nature”.

Sustainability is clearly understood – but needs clarifying

A deeper dive into national perceptions of the Nature in Mind name and logo reveals a strong alignment with sustainability. 87% of consumers believe the name suggests a more sustainable or environmentally friendly product, while 45% feel this strongly.

However, while the majority grasp the concept, some ambiguity remains. Nearly one in five consumers (19%) said they weren't sure what the phrase meant – highlighting a need for clearer, more specific communication.

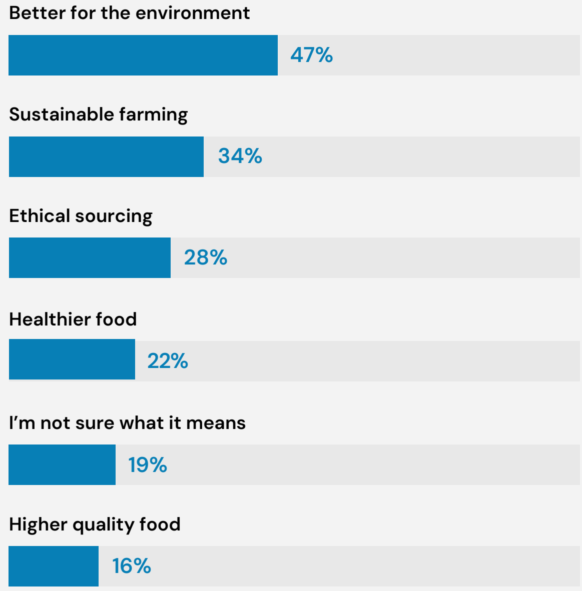
When asked what aspects of sustainability they associated with Nature in Mind, respondents pointed to:

'Better for the environment'
47%, driven by older women (e.g. 58% of women aged 45–54)

'Ethical sourcing'
28%, also skewing slightly older and female.

'Sustainable farming'
34%, with strong resonance among young women aged 18–24 (52%)

What do you think 'Nature in Mind' means?



Sent to a nationally representative sample

Meanwhile, men aged 35–44 were more likely to interpret the phrase as referring to higher quality (1.7x more likely), or health benefits (1.6x more likely for men aged 45–54), showing that male shoppers are increasingly linking sustainability with personal wellbeing.

Impact on purchase behaviour

The Nature in Mind campaign already has some impact on purchase decisions. 47% of consumers said the logo would influence their choices at least a little, and 18% said they would be more likely to buy, rising to 24% for shoppers under 35. An additional 20% said they might buy but needed more information first.

This underscores a consistent theme throughout the research: engagement increases when understanding is improved. In fact, when the Nature in Mind label is paired with a clearer term like regenerative agriculture, trust and purchase intent rise:

- 24% would be more likely to trust the label
- 19% would be more likely to buy

Still, 33% of consumers say they need more information before making a decision – rising to 40% among over-55s. Clarity, then, is the next step to unlocking further adoption.

Taste and quality are core drivers - with sustainability gaining ground

Taste and quality remain the top priority for Waitrose shoppers, with 56% naming it as their main purchase driver - and this rises to 74% for those aged 55 and over.

While only 6% cite environmental impact and 6% mention ethical sourcing directly, these are likely baked into the broader idea of "quality" for many. Interestingly, men aged 35–44 were 2.5x more likely to explicitly name environmental impact as a key concern (16%) - highlighting a segment of values-led male shoppers worth watching.

There's a strong appetite for clearer, visible commitments from Waitrose:

49% want to see more products labelled as regenerative, sustainable or organic

Among men aged 25–34, this rises to 71%

Another 36% said they'd like to see those labels if the benefits were relevant to them - such as health, locality or community impact.

Shoppers expect Waitrose to lead on sustainability

Finally, when asked who should take responsibility for improving the food system's environmental footprint, shoppers placed retailers and brands at the forefront:

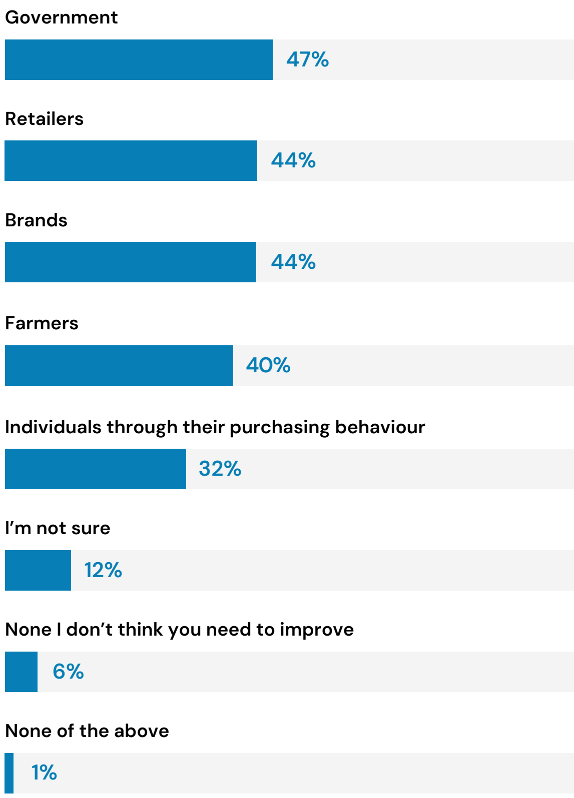
- 44% say retailers
- 44% say brands

Consumers over 45 are more likely to also cite the government, while younger consumers and those without children assign more individual responsibility

One theme came through clearly in open comments: shoppers expect action. From reducing chemicals and cutting plastic to sourcing more ethically, the belief was consistent – Waitrose has the influence and credibility to drive change.

As one consumer put it: "If the food industry wants to be around for years to come, it must ensure it's not damaging the ecosystem it depends on."

Whose responsibility is it to improve the food industry's environmental footprint?



Sent to a nationally representative sample

Opportunities for Waitrose and 'Nature in Mind'

This research suggests that Nature in Mind is already striking the right tone – it's seen as natural, sustainable, and trustworthy. But to fully deliver on its potential, the campaign can go further by:

1. **Improving Visibility.**
   In-store signage needs to be amplified further, particularly to reach older and female shoppers.

2. **Clarifying the Message**
   Some confusion around what "Nature in Mind" means is holding back greater trust and conversion. Adding clearer explanations and pairing it with terms like regenerative or organic will boost understanding.

3. **Educating the Consumer**
   Leaflets, posters, packaging, and staff engagement are all welcome tools. Many shoppers are open, curious, and even eager to learn more – especially younger men and women under 35.

4. **Strengthening Associations**
   Positioning Nature in Mind as a marker of health and quality, as well as sustainability, will help reach those who see value through a personal lens.

With clear values, strong brand equity, and a reputation for doing the right thing, Waitrose is in a powerful position to make regenerative thinking part of everyday shopping.

Beyond the data: What the experts think

The numbers tell one story, but the people behind the movement add vital context, nuance and urgency. In collaboration with Vypr, industry leaders, scientists, farmers and sustainability experts responded to the findings, offering their reflections on what the data means for the future of regenerative farming. Their insights bring the research to life and highlight the real-world implications for brands, retailers and policymakers alike.

Beth Mander

Programme Manager | Ellen MacArthur Foundation

This research does an excellent job of highlighting the opportunity to engage people in the transition to regenerative food production. When shoppers see that their actions matter, they respond, and they genuinely want to be part of making a positive difference. It's clear that most people see this becoming even more important as we rebuild connections to where our food comes from.

In the EU and UK, the top 10 FMCG companies and retailers directly influence over 40% of agricultural land. That's a massive lever for change and one of the most powerful insights here is that consumers expect these players to lead the way on sustainability.

This is exactly where frameworks like our Circular Design for Food come in. It offers a practical, systems-based design approach that delivers what people want: food that's good for nature, climate, and communities. In 2023, the Ellen MacArthur Foundation challenged food companies to prove it could be done, and they did. Today, 141 products designed with Nature in mind are on the market, showing that this is not just possible, it's scalable.

ELLEN MACARTHUR FOUNDATION

This report is a timely signal of the momentum building behind the regenerative transition. It highlights the appetite for change and the growing expectations on retailers and brands to lead. By supporting and scaling the efforts of pioneering businesses already designing food that's better for nature and climate, we can accelerate the shift toward a food system that truly works for people and the planet.

Sophie Kirk

Senior Commerical Manager | Soil Association

This report provides excellent insight into how brands and retailers can further unlock growth in sales of regenerative products through addressing consumer awareness and price barriers. The research also clearly outlines a consumer need for further education, trust and assurance around regenerative to help drive purchase and there is a need for clear information and further transparency on regenerative practices to help consumers make informed choices.

The future potential of regenerative and the momentum behind it is clear. However, the report showed that many respondents are sceptical of corporate sustainability claims and there is also a risk that the term regenerative could be vulnerable to greenwashing, due to the lack of regulation and safeguards about regenerative practices, and it could be used by non-serious actors as a marketing term to repackage "business as usual". Tools such as organic certification, and measurement and monitoring of environmental outcomes can help to mitigate against greenwash in this unregulated space.

With customers crying out for clarity and transparency, organic certification provides robust safeguards and is a trusted signpost for customers seeking assurance in regenerative products. Organic farming is underpinned by a set of rigorous standards that have been carefully developed over 70 years to build soil health, biodiversity and ecological balance. As such, organic is proven to deliver a range of restorative outcomes, such as on average 30% more wildlife on organic farms, 25% more soil carbon storage and healthy, living soils with more soil microorganisms. What's more, organic farmers and businesses are independently inspected every year and the rules for organic are enshrined in law, providing a system of guarantee, protecting against greenwashing and helping shoppers to make informed choices. The UK organic food and drink market is growing rapidly and valued at £3.7 billion providing a scalable and trusted choice for those seeking regenerative products.

Soil Association CERTIFICATION

Holly Holder

Senior Marketing Manager | Wildfarmed

This Vypr report has accelerated Wildfarmed's understanding of the potential growth and scale of the regenerative audience, and given us a much deeper understanding of both the general approach and awareness of regenerative agriculture and the Wildfarmed specific audience.

The report overall highlighted some very positive findings, including the openness to switching to a regenerative brand, once barriers such as quality have been overcome. This insight marries deeply with work that is ongoing internally at Wildfarmed with our NPD team and gives us great confidence in our future plans.

The Wildfarmed specific data was positive confirmation of our combination of physical and digital visibility when driving awareness of the brand, bolstering our marketing tactics of strong in store POS combined with an innovative and unique social media approach. The report continued to corroborate data that we are seeing elsewhere, not just within Wildfarmed, that consumers are willing to switch to a more sustainable brand if the quality is matched, the price is accessible and the environmental benefits are clear.

Key Takeaways

1. **One in two consumers have an awareness of regenerative farming, but much less actually understand what it is, and why it matters.**

   Even among those who claim to know what it is, there is a lack of engagement – especially among the older groups. Promisingly, there is an appetite to learn. At this stage, the best course of action for brands would probably be to boost education levels.

2. **Our research indicates that social media platforms are a good channel to target younger consumers, while the older groups opt for news articles and documentaries.**

   Adding in more information on the packaging, signage on supermarket shelves and clear labels could help to generate awareness, education and engagement.

3. **Partnerships between well-known brands and specialist regenerative ones could be mutually beneficial.**

   Major retailers can appeal to a wider range of consumers. Meanwhile specialists can earn the trust of consumers, who deeply value brand familiarity.

4. **A tailored approach would be the most effective way to reach potential consumers.**

   Older consumers prioritise the environmental benefits of regenerative farming, while younger consumers focus more on health and nutrition. Catering to these distinct needs can help producers, retailers and restaurants boost demand.

Key Takeaways

5. **Price remains the greatest barrier to adopting regenerative products, with more than a third of consumers unwilling to pay any extra.**

   However, with competitive pricing and loyalty schemes, most consumers would be willing to change their minds - especially if the benefits were communicated to them.

6. **Fresh fruit and vegetables are the products that consumers are most willing to pay extra for.**

   Overall, over-45s would rather buy regenerative products from familiar brands, while under-34s are open to new market entrants.

7. **Messaging for regenerative products should focus on sustainability, local farming, and health benefits .**

   Consumers resonate most with "better for the planet" (31%) and "support British farmers" (24%), making these strong themes for marketing campaigns.

8. **For brands and retailers, education, accessibility and visibility is critical to boost consumer awareness and trust.**

   A strong blend of on-packaging information, in-store displays and social media drives can help to reach a broader audience.

In summary

A vast chasm is forming. On one side, consumers overwhelmingly demand sustainability from the food industry, with the majority of people deeply concerned for the future. On the other, are the regenerative food brands, working with nature to put healthy and environmentally-friendly produce on our plates. In the middle is a profound lack of knowledge.

Most consumers simply don't know what regenerative farming is. The name is not intuitive, and neither are the campaigns surrounding it.

Yet ironically, regenerative farming is not new. It is the original form of agriculture. Long before pesticides, plastic or carbon pollution, farmers worked with nature for their produce. This 'back-in-time' approach could be easier for consumers to quickly understand, rather than adding in jargon which could confuse or complicate.

The lack of awareness also means that the majority of consumers do not know what the benefits are, adding yet another barrier to purchase.

However, the outlook is bright. Consumers are hungry for knowledge about regenerative farming. There is a strong appetite to understand what it is, and how it can help the world. While different demographics have differing motivations, the overall sentiment is the same, knowledge is key.

Regenerative products are what almost every consumer wants, but very few know about. Until education is provided, there is a risk that these much-demanded products will remain invisible on supermarket shelves. Educational campaigns, promotions and loyalty programmes have the potential to help boost awareness across demographics.

There is a unique and powerful opportunity for brands and retailers to fulfil this screaming knowledge gap. For those that do, they can propel their products into more baskets and onto our plates.

Organisations to know

Whether you're looking to deepen your understanding, connect with others in the space, or take your next step toward regenerative action, these organisations are leading the way. From advocacy to certification, research to education, they're shaping the future of food and farming and offer a wealth of insight for FMCG brands ready to make a difference.

The Ellen MacArthur Foundation

The Ellen MacArthur Foundation is an international charity whose mission is to accelerate the transition to a circular economy in order to tackle some of the biggest challenges of our time, such as climate change, biodiversity loss, waste, and pollution.

ELLEN
MACARTHUR
FOUNDATION

Increasingly based on renewable energy, a circular economy is driven by design to eliminate waste and pollution, circulate products and materials at their highest value, and regenerate nature. The Foundation's Food Initiative is working to stimulate a global shift towards redesigning food using the principles of a circular economy to regenerate nature, inspiring systemic change in the food industry and normalising nature-positive food. In 2023, the Ellen MacArthur Foundation, in partnership with the Sustainable Food Trust, launched the Big Food Redesign Challenge, to catalyse and inspire the food industry to build a better food system that regenerates nature, based on the principles of a circular economy.

The challenge brings together ambitious producers, retailers, start-ups, and suppliers to design new food products – or redesign existing ones – to regenerate nature.

Discover more about making nature-positive food the norm:
www.ellenmacarthurfoundation.org/resources/food-redesign/overview

Wildfarmed

Wildfarmed is a regenerative food and farming business on a mission to transform landscapes.

Founded in 2018 by Andy Cato, George Lamb and Edd Lees, Wildfarmed has developed a community of farmers and businesses across the UK and France working together to fix our broken food system.

Creators of the Wildfarmed Regenerative Standards, the UK's first third party audited regenerative standards for arable farmers, Wildfarmed grows wheat in a way that ensures positive outcomes, reducing carbon and river pollution while increasing biodiversity and soil health making our landscapes full of life once more.

Farmers are provided with a proven, commercial roadmap combining food security and nutritional quality, which ensures flexibility for growers and allows customers to become part of the solution to the world's most complex problem: climate change.

The result is a transformed food system where everyone in the supply chain is rewarded fairly, including consumers who no longer have to choose between food that tastes good or food that is good for the planet. By growing with nature, Wildfarmed is tackling climate change, and changing the future of food for good.

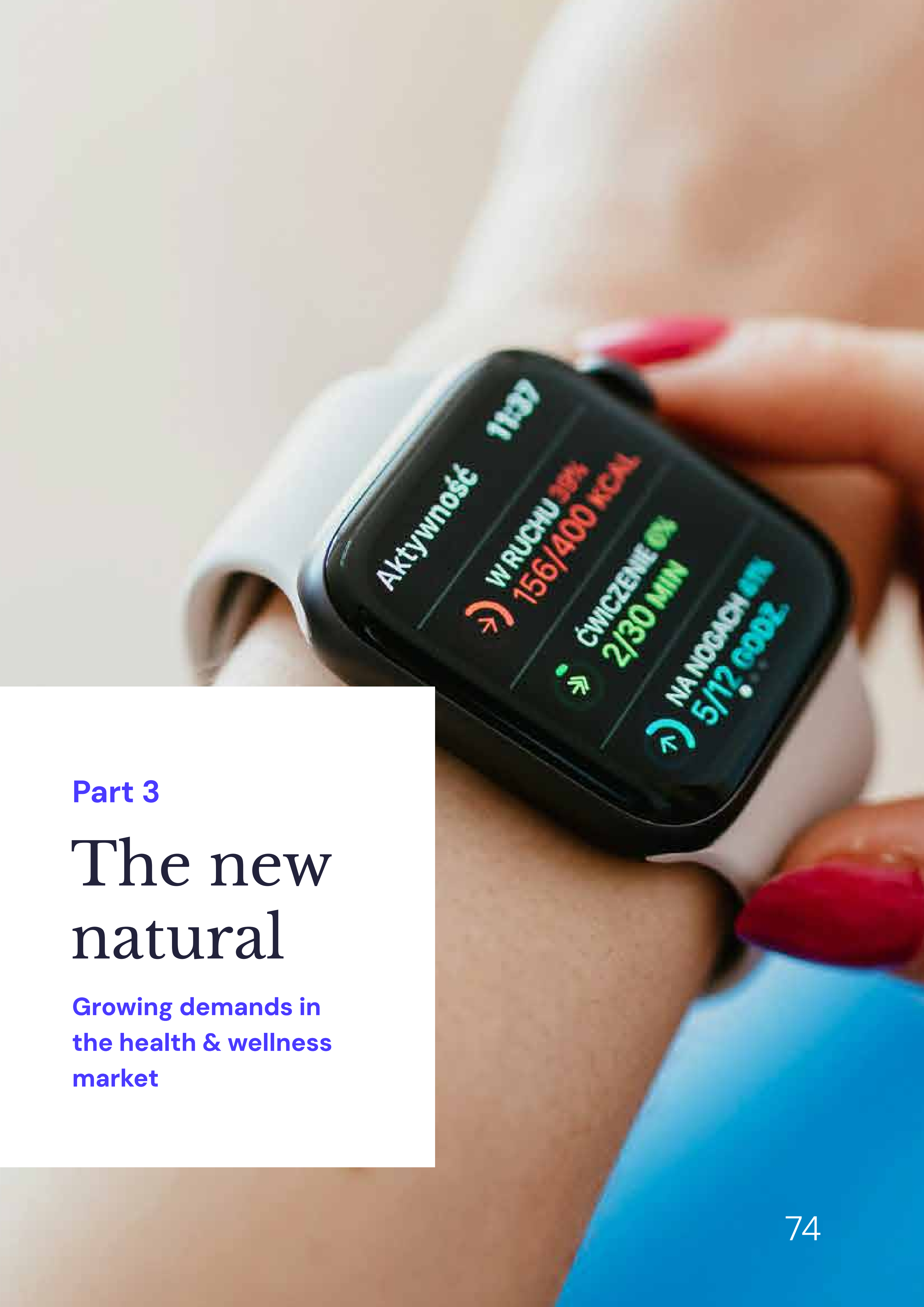
Discover more about Wildfarmed
www.wildfarmed.com

The Soil Association

We're the UK's leading sustainability certification body, offering a range of best-in-class organic and sustainable certification schemes across food, farming and forestry.
We certify the majority of UK organic food processors and work with around 3,700 clients in the organic supply chain. These range from small farms to large organic brands, processing plants and retailers. The Soil Association organic symbol is the most recognised in the UK.

Soil Association Certification is a company of the Soil Association, an innovative charity with over 75 years of expertise in practical food, farming & forestry solutions. All Soil Association Certification profits are either given to the Soil Association Charity or reinvested into the certification company to help grow the organic market. Through our certification work and by sharing our profits, we help the Soil Association develop practical food, farming & forestry solutions to restore nature and ensure good food for all.

Discover more about The Soil Association's certification
www.soilassociation.org/certification



Part 3

The new natural

Growing demands in the health & wellness market

In-brief

Shedding unnecessary processing, pounds and products is important for a growing cohort of UK consumers. In their quest to look and feel healthier, **many are considering minimalist principles**. They're attracted to intentional multi-purpose goods, and (to a lesser extent perhaps) how they affect the planet.

As today's consumer embraces a more holistic lifestyle, they incorporate **modern elements like wearable technology to help them meet their goals.** From minimal processing to appetite suppressing drugs, the landscape is scattered with convictions and contradictions. In this section, we're navigating the twists and turns consumers face, as they embrace a new kind of natural living.

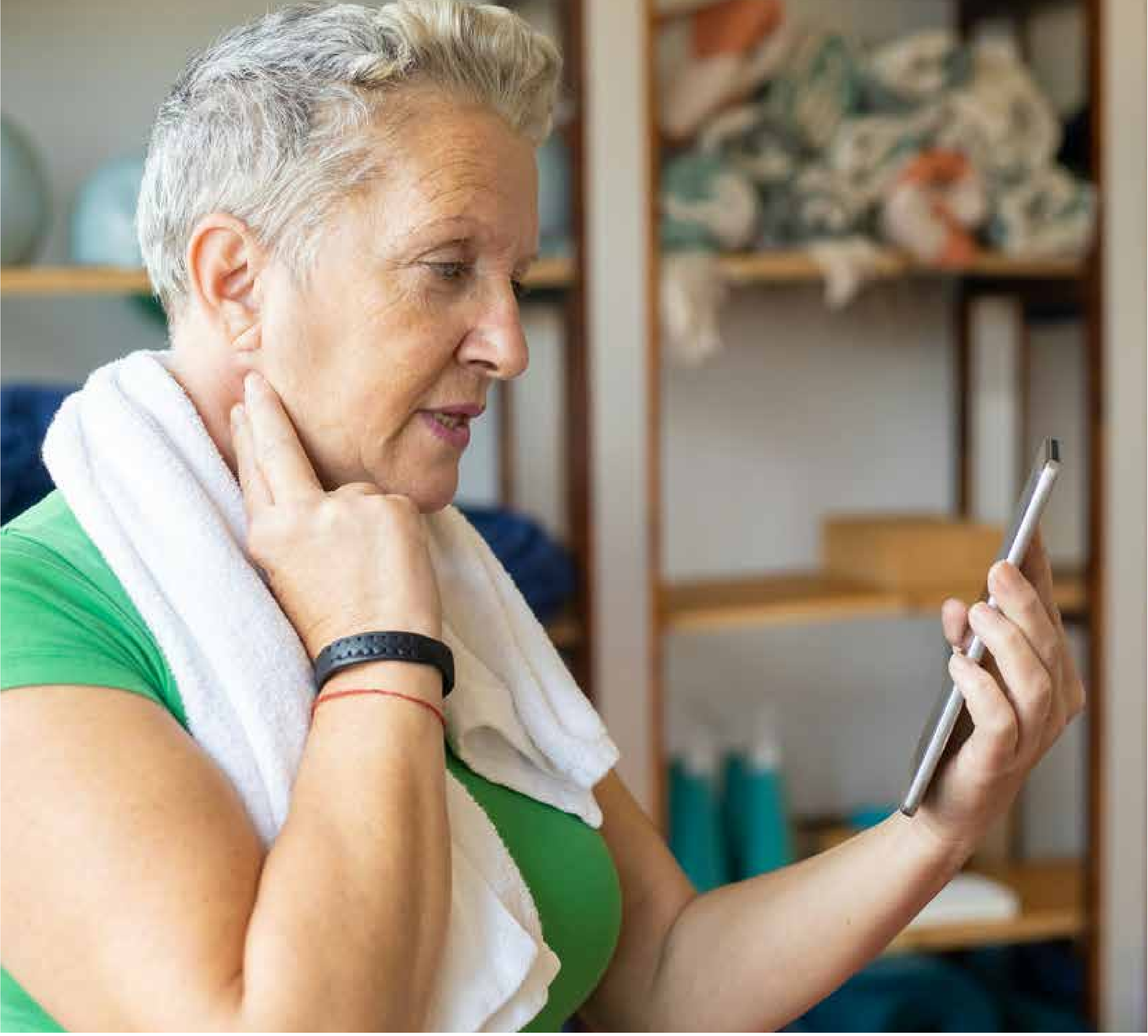
Our research reveals that the **health and wellness market is evolving quickly**, shaped by a consumer desire for balance, transparency and simplicity. Shoppers want to make better choices **without sacrificing taste, convenience or affordability**. Whether it's choosing plant-based foods, seeking transparency when dining out, or simplifying their skincare routine, today's consumers are cutting through the noise and opting for a more 'natural' way to live.

Consumers want simplicity without sacrifice

Minimalism is gaining momentum across categories. Consumers are actively seeking fewer, better options from low-processed plant-based products to multi-purpose skincare, but they aren't willing to compromise on taste, quality or affordability, creating a clear opportunity for brands who can deliver all three.

Trust, transparency and value drive decision-making

Consumers increasingly want clarity about what they're buying, particularly when dining out or selecting wellness products. Transparency around ingredients, processing and functionality is now expected, and while price sensitivity remains, many shoppers say they'd pay more when the value is clear.



The wellness market Is ready for innovation

This shift towards a 'new natural' presents fertile ground for brands and retailers. Consumers are open to functional beauty products, wellness wearables, and multi-functional household goods that make healthy living easier. Brands who focus on transparency, affordability and simplicity are well-placed to lead this growing movement.

In this section, we explore how health-conscious shoppers are driving change across food, beauty and wellness - and where brands can unlock growth by meeting their demand for simplicity, transparency and value.

Highlights

“Organic” is the **most trusted** allergen-free label.
Page 80

The optimal price point for a **high-protein meal** sits at £6.63. Page 85

Around half of shoppers (51% would browse a **dedicated health and wellness hub in retail stores**, with one in six (15% visiting frequently.
Page 87

More than three quarters (78%) of UK consumers have a **skincare routine**
Page 91

Two thirds of the population (68%) are interested in **multi-functional household products** that replace multiple items.
Page 95

Dive into our ‘The new natural’ section to discover key insights and cross-sector takeaways.

Food and beverage

The world of food and beverage is changing. A mindset shift away from ultra-processed foods is accompanied by rallying support for plant-based, free-from and sleep-support products. At the same time, consumers face a glamourisation of appetite control medications like Ozempic. This section explores these unique trends to see how consumers react and whether their intentions match their behaviours.

Plant-based products

We focused on minimal processing as the most important factor in building trust. Although the vast majority (85%) of consumers do not want to see signs of ultra-processing in their plant-based foods, most will make some exceptions.

One in four (25%), for example, balance it against other factors like taste and nutrition. And just over one in ten (13%) will accept it if the product meets their needs.

One-fifth (21%) of consumers would also overlook higher processing levels in favour of added health benefits.

Plant-based protein is edging increasingly into the mainstream as more than half (56%) of consumers consider that it could be interchangeable with meat. Within this group, the majority (67%) think that it also depends on the meal.

For two-thirds (64%) of vegans and vegetarians, however, animal products remain a separate category. Possibly because they do not switch between meat and plant-based foods themselves.

Delving deeper, we asked consumers whether they would select a plant-based product over meat, if the protein levels were identical. Almost two-thirds (61%) said they would be likely to try it, with 18% "very likely".

Superior health benefits, better taste and lower prices would be most likely to sway consumers away from meat products, picking up 27%, 22% and 20% of the votes, respectively. However, factors like sustainability (16%) and higher protein content (15%) also play a role.

This contrasts with the overall motivations for buying plant-based protein. When they are not comparing against meat products, consumers consider the health benefits much less (at just 8%). Instead, what matters most is taste (36%), price (19%) and ingredients (10%).

Surprisingly, the protein content is considered much less important for plant-based protein products, at just 5%.

Free-from products

Price is the greatest barrier preventing consumers from purchasing "free-from" products, accounting for 29% of votes. In second place, "taste" was another core obstacle, with 23% of votes.

A quarter (26%) of consumers are put off by accessibility issues, namely the limited options (13%) and availability of products (12%).

Over half (53%) of consumers would at least consider paying more for products from dedicated allergen-free facilities, with more than one in six (17%) strongly agreeing. Interestingly, under-44s are 1.4x more willing to pay extra for this (28% compared to 17%).

Allergen-free labels have an impact on purchasing decisions. Half (50%) of consumers would be likely to buy products with this, with one in five (21%) very likely.

"Organic" is the most trusted allergen-free label, attracting almost half of the votes (47%). Vegan Society and Coeliac UK secured 23% and 19% respectively. Meanwhile, one in ten (11%) consumers don't trust any label.

Sleep support products

Over a third (37%) of UK consumers buy products marketed for sleep support. But within that group, one in three (35% or 13% overall) buy them for non-sleep related reasons.

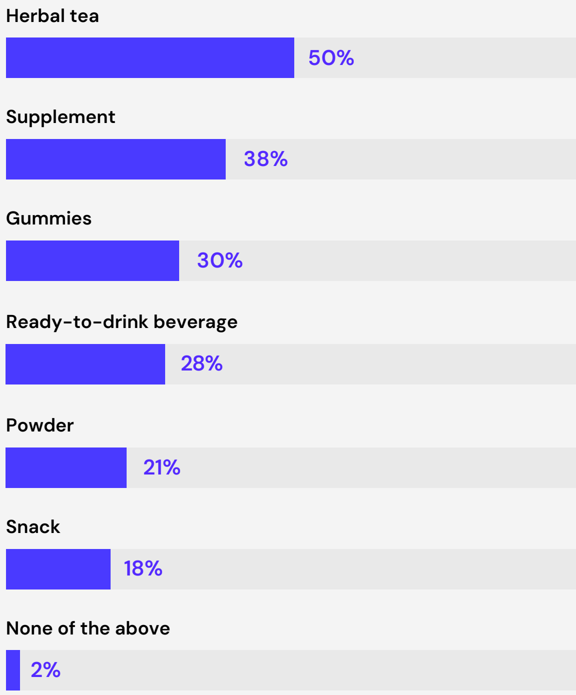
Herbal tea is the most popular sleep product, accounting for 51% of the votes. In second place comes supplements (39%) - propped up by the over-44s who are 1.6x more likely to add them to the shopping basket. Gummies account for just 31% of votes and appeal more to under-24s, who are 1.4x more likely to buy them.

Perhaps unsurprisingly, most people (83%) consume their sleep products like tea, supplements or gummies in the evening (27%) or before bed (55%). However, nearly fifth (13%) take them during the day – suggesting they may be taking sleep supplements for soothing properties or to aid "non-routine" sleeping patterns (such a shift working).

When considering sleep products, consumers are most drawn (36%) to natural ingredients. Other influential factors include positive reviews (28%), scientific backing (27%) and doctor recommendations (26%).

While consumers aged between 35 and 44 tend to prefer scientific backing (35%), the age 44-54 group above them lean more towards positive reviews (39%).

Which product format do you think would be most effective for sleep support?



Multi-answer – sent to those who answered "yes" to the qualifying question "have you purchased a food or drink product specifically marketed to improve sleep in the last 6 months

GLP-1 and appetite bontrol

Two-thirds (65%) of UK consumers have heard of medications like Ozempic and Wegovy. Within this group, most people (69%) broadly understand how they work. Of which, women are 1.4x more likely to have heard of GLP-1 drugs than men (53% compared to 38%).

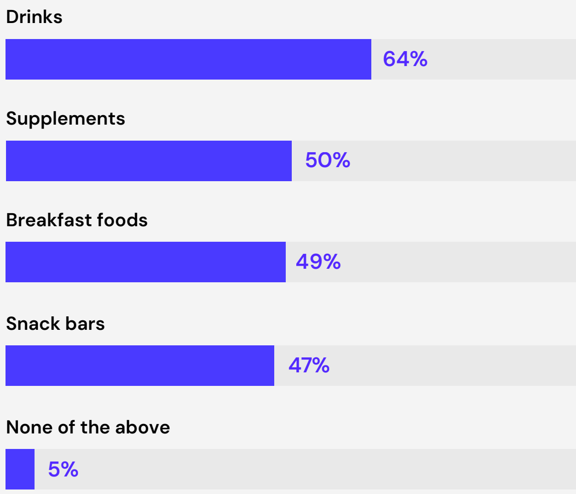
Perceptions around appetite control products are split. Just under half (48%) would be at least somewhat likely to try food or drink that suppresses appetite. However, just a fifth of this group (20% - or 10% overall) would be very likely, suggesting some caution or scepticism.

The remaining 52% of consumers are less likely to try appetite suppressors. However, within this group, one in two (46% - or 24% overall) could change their minds, indicating potential curiosity and intrigue flickers.

Drinks are the most appealing type of appetite control product, accounting for 64% of votes. Consumers aged between 35 and 44, were 1.2x more likely to opt for this (79% compared to 64%).

Supplements, breakfast foods and snack bars also show potential, garnering 50%, 49% and 47% of votes, respectively. Consumers aged 45-54 are 1.3x more likely to opt for supplements (67% vs 50%). Meanwhile, the younger 25-34 years group are 1.4x more likely to go for breakfast foods (67% vs 49%).

Which of these product types would you be most open to trying if they supported appetite control?



Multi-answer – sent to those who answered "extremely likely" to "if a food or drink product claimed to support weight management through GLP-1 style appetite control, how likely would you be to try it

Slightly over a fifth (21%) of consumers prioritise low-calorie counts when they look for weight management foods. High protein levels are the second most important factor, with more than a sixth (17%) of shoppers seeking this. Low sugar and natural ingredients come third and fourth, with 16% and 15% of consumers prioritising this.

Dining out

Health and wellness trends are weaving into food service. The levels of processing and protein are becoming as considered as the price. This section looks at consumer preoccupations and motivations when eating out.

Ultra-processed foods (UPF) in dining out

Ultra-processed ingredients are on the minds of over half (55%) of the UK's diners, with 23% considering this often (16%) or always (6%).

Independent cafes and restaurants are perceived to offer the healthiest meal options, with a third of consumers (33%) believing them to be somewhat (26%) or very (7%) healthy.

Casual high street restaurant like chains are considered to be the second-healthiest dining out option, with a quarter (25%) of consumers seeing them as somewhat (19%) or very (6%) healthy.

On the other hand, fast food restaurants are viewed as the most unhealthy. More than half (56%) of consumers consider them to be somewhat (32%) or very (24%) unhealthy.

Food delivery services like Uber, Deliveroo or Just Eat have a wider range of perceptions. Overall, however, consumers tend to think of them as generally bad for health, just under half (46%) feel that these services are somewhat (29%) or very (16%) unhealthy.

Minimal processing and freshness matters, with a third (32%) of consumers prioritising this as they decide whether or not to eat out.

However, it is not as important as taste, which is the main motivator for more than two in five (44%) diners. In third place comes price and affordability, which is the most pressing factor for over a fifth (22%) of consumers.

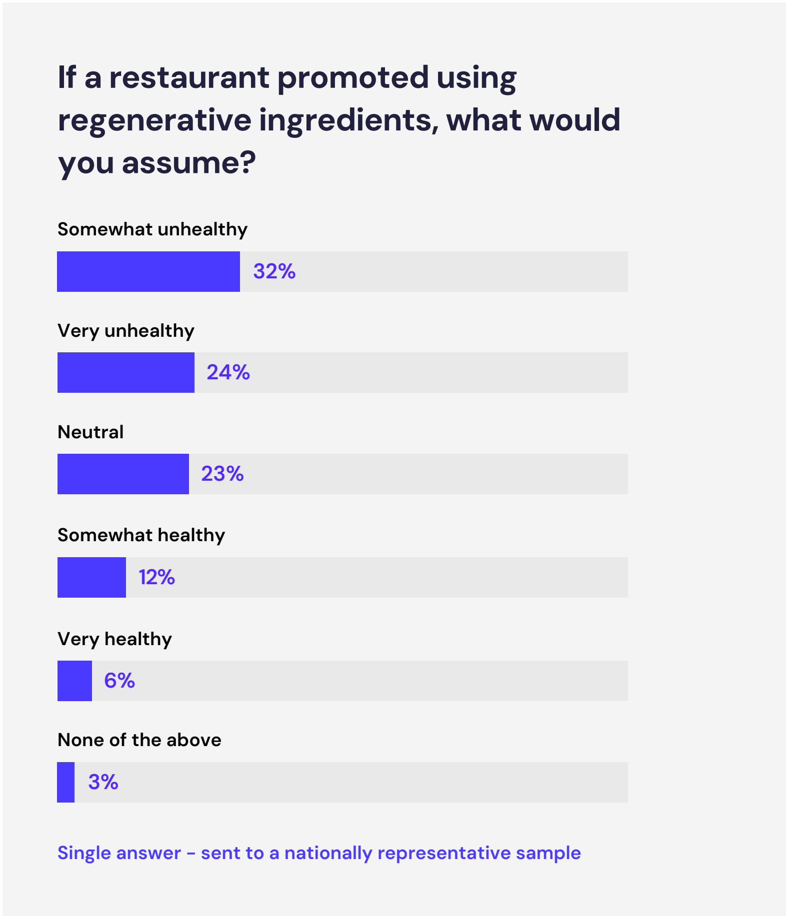
When consumers are seated at the table, deciding between two dishes, the same principles broadly apply. Most people (47%) would pick the tastiest option, then the most natural (21%) and finally, the cheapest (19%). It's interesting to note that the importance of natural ingredients decreases when diners decide between two dishes, and taste becomes more important.

However, there is one exception. Health-conscious consumers (those following a specific diet for health reasons) are almost three times (2.9x) more likely to opt for the most natural meal (61% vs 21%).

Half (50%) of consumers would change their dining out behaviour if they had more information about the processing levels in restaurants.

Depending on what they discovered, these diners would rethink their food choices (21%), be more likely to eat in some places (25%), and be less likely to eat in others (3%).

Just a third (35%) of diners would be willing to pay more for more natural ingredients, and less than a sixth (13%) would go above a 10% cost increase.



Protein preferences

Over half (55%) of consumers would find protein labels helpful. More than a sixth (18%) would use this information to switch to a higher protein option.

Interestingly, among the consumers who were not interested in protein labels, over one in ten (14%) said this was because they already make high protein choices. This suggests that the overall number of people benefiting from protein labels could be higher than 55%... Even if consumers don't feel that they need it.

Diners care about the source of their protein. Fresh and natural ingredients are the top priority for most (30%) of consumers, rising to one in two (50%) for over-55s.

In a close second, the next most important factor is taste, securing 28% of the votes. Equally weighted at 15%, a sixth of all consumers opt for either protein which is good for the planet (like plant-based sources) or that will keep them fuller for longer.

The optimal price point for a high-protein meal sits at £6.63, with a sharp drop-off in willingness to pay beyond this amount. Interestingly, consumers under 24 are more willing to spend extra.

When it comes to formats, hot protein-based meals are the nation's favourite, securing 39% of votes - with the age group 45-54 age group rising to 61%.

Younger consumers aged 18-24 have more tolerance for colder foods. This group is 1.8x more likely to favour a protein snack or smoothie (30% vs 16%) and 1.5x more likely to select a sandwich or wrap (20% vs 13%) for their protein needs.

More than two-thirds (65%) of consumers actively look at their protein sources. Within this group, two in five (40% or 26% overall) seek out animal products. Another two in five (40% or 26% overall) use a mix of animal and plant products, and the remaining one in five (19% or 13% overall) look for plant products only.

Retail

Health and wellness in retail are largely centred around athleisure brands, which combine sports and lifestyle into one. As traditional sports brands spread into new wellness areas, we're exploring which products would appeal most to consumers and why.

Athleisure

Supermarkets and department stores are the most popular shopping destinations for athleisure and wellness products, securing 34% of votes. For consumers aged 45 to 54, this rises to 41%.

The second most attractive option is shopping for athleisure online, accounting for 28% of votes, increasing to 35% for younger consumers aged between 18 and 24.

Finally, sports retailers are still hubs for athleisure and wellness products. Around a quarter (25%) of consumers voted them as the preferred choice, rising to 37% for the 45-54 age group.

Price and affordability remain front of mind for sports consumers. Two in five (40%) put this first as they shop. Consumers are also looking for value, possibly suggesting that their approach to cost-cutting is long-term.

Comfort (38%) and functionality (21%) are the second and third most important factors for consumers, ahead of brand reputation (18%) and sustainability (13%). Two in five (40%) consumers want their athleisure brand to align with their wellness values, so it's essential for one in ten (11%).

Most consumers (42%) would prefer to browse for health and wellness products in a dedicated section of the store. Just over a quarter (26%) would like them integrated throughout stores, for example, blended with sports aisles. And for less than one in ten (8%) shoppers, close to the checkout is the preferred location.

Around half of shoppers (51%) would browse a dedicated health and wellness hub in retail stores, with one in six (15%) visiting frequently.

Supplements - such as those supporting sleep, gut health, or energy levels, are the most requested health and wellness add-on products from athleisure brands, chosen by 30% of consumers. Among those who exercise several times a week, this demand rises to 38%.

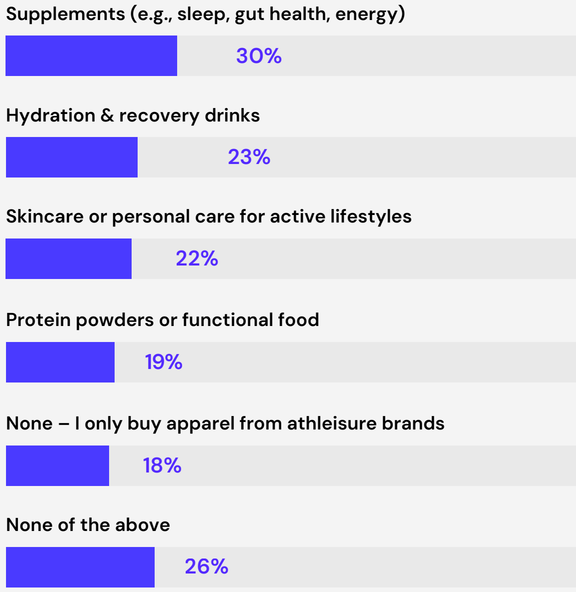
Other popular health and wellness products consumers want from athleisure brands include hydration and recovery drinks (23% of votes), skincare or personal care items (22%), and protein powders or functional foods (19%).

Hydration and recovery drinks are particularly appealing to those who exercise several times a week, with 31% of this group interested - 9% more than the average (22%). This group is also 1.4 times more likely to buy protein powders and functional foods (27% vs 19%). Interestingly, this trend does not extend to consumers who exercise daily.

This could suggest that people who work out several times a week tend to engage in more intensive exercise sessions, creating a more substantial need for hydration and recovery products. The increased demand for protein powders may also reflect a greater focus on muscle building within this group.

Just under two in five (39%) consumers would be interested in joining an athleisure subscription or loyalty program with wellness perks. One in six (15%) would be "very likely" to join. Consumers between the ages of 24-45 are 1.5x more likely to be interested in this (59% vs 39%).

What type of wellness products would you be most likely to purchase from an athleisure brand?



Multi-answer sent to a nationally representative sample

Sleep, mindful beauty & minimalist skincare

Consumers are increasingly considering a holistic approach to beauty and wellness. Part of this trend is minimalism, as they move away from hordes of items in favour of fewer, more intentional pieces.

Beauty sleep products

A third (32%) of consumers consider sleep quality when they choose beauty items, with one in ten (10%) actively seeking products that promote better sleep.

Exploring the subject further, around two in three (59%) consumers associate or use some sleep products for beauty. The most well-known are sleep sprays and pillow mists, collecting 34% of votes. In second place are sleep-supporting supplements like collagen, magnesium or melatonin, with 23%. The third most known or used products are overnight masks and treatments, with 19%. Finally, night creams and serums with calming ingredients like lavender or chamomile collected 17% of votes.

Notably, younger consumers aged between 18 and 34 are more engaged with this trend. They are 1.5x more likely to use overnight masks and beauty treatments than the population average (29% vs 19%) , and 3.2x more likely than over-55s (29% vs 9%). The recent Instagram and TikTok trends of “sleepmaxing” and “morning shed" could be fuelling some of these purchases and associations.

Over-55s are generally less engaged with this trend. Three in ten (61%) do not use beauty products for sleep, around a third (61% vs 41%) more than the population average.

In fact, over half of consumers (51%) would be open to trying a sleep-enhancing beauty product, with more than a third (18%) “very likely” to test it out.

Mindful beauty

When it comes to mindful lifestyles, we asked consumers what they look for in beauty products. Collecting 30% of votes, multi-purpose functionality was the most sought-after feature. For example, a body butter that also works as a hair mask, a concealer that also functions for contouring or a tinted moisturiser that serves as a foundation. This could suggest cost sensitivity or a move towards a more minimalistic style of mindfulness

With 27% of votes, sustainability and ethical sourcing is a close second. This demand is driven by a strong response from the 25 to 34 age group, who are 1.6x (42% vs 27%) more likely to pick up a sustainable beauty product than the population average. Along the same lines, minimal packaging and reduced waste was another strongly appreciated characteristic, securing 25% of overall votes.

Almost half (47%) of consumers are interested in beauty products that incorporate mindfulness elements, such as aromatherapy, rituals or guided relaxation, with nearly one in two (18%) very interested. Younger demographics, aged from 18 to 34 are especially interested in these products (53% vs 47% overall).

When looking for mindful beauty products, most consumers (34%) would head to a health and wellness store, such as Holland & Barrett. Around one in six (16%) would look in supermarkets and drugstores. One in ten (7%) would browse online direct-to-consumer brands, and less than one in ten (7%) would go to beauty retailers like Sephora or Space NK.

Over a quarter (26%) of consumers do not seek out mindfulness-driven beauty products at all, suggesting they could be more of an impulse purchase.

Minimalist skincare trends

More than three-quarters (78%) of UK consumers have a skincare routine, with women 1.3x more likely to have one than men (87% vs 67%).

Overall, nearly two in five (39%) of consumers adopt a “balanced, moderate routine", More than one in five (29%) have a minimalist approach with three or less products. Meanwhile, just one in ten (9%) follow a maximalist multi-step routine, suggesting that a more minimalist approach is gaining popularity.

We asked the 83 consumers who follow a maximalist routine what was holding them back from adopting a minimalist skincare approach. With 30% of the votes, the most popular reason was that they enjoyed having multiple steps. Younger consumers aged 18-24 are 1.8x more likely to experience this (55% vs 30% overall). Interestingly, those in the 45 to 54 age range are 1.5x more likely to enjoy multi-step routines, too (46% vs 30% overall).
In joint second, with 18% each, maximalist consumers worry that fewer products will be less effective and are unsure which “unessential” products to cut. Men are more inclined to doubt which products to eliminate (28% vs 18%).

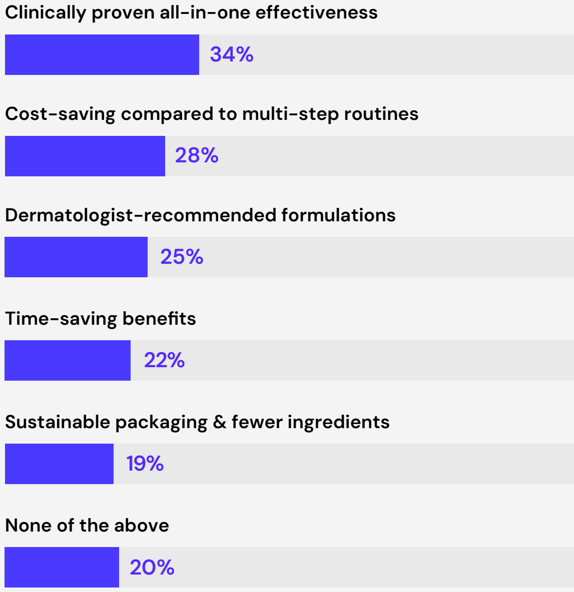
Curiously, around one in six (16%) maximalists believe that they're already following a simple routine. Older consumers over the age of 65 are more than twice as likely to think this (36% vs 16% overall).

Two in five (41%) consumers would be willing to try a multi-functional skincare product. Within this group, over a third (38% - or 11% overall) would be excited about the simplicity.

However, UK consumers also have a strong dose of scepticism towards multi-functional skincare claims. Among those (30%) who would be willing to try it, two-thirds would only do so if the benefits have been proven. One in ten (11%) consumers would not be willing to try it because they would not have confidence in the claims.

We also asked consumers what skincare claims would encourage them to switch to minimalist routines. In the top position at 34%, were looking for clinically proven all-in-one effectiveness. Other attractive claims and labels include cost savings (28%), dermatologist-recommended formulas (25%), time-saving benefits (22%) as well as sustainable packaging and fewer ingredients (19%).

Which skincare claims would make you most likely to switch to a minimalist routine?



Multi-answer sent to a nationally representative sample

Wearables, sleep, and minimalism

Interestingly, the holistic and minimalistic trends have crossed over into wearables. Consumers are using wearable technology to meet their health and wellness goals. This section explores the popularity and potential of wearable wellness.

Rise of wearables in the home

Most consumers (62%) are at least somewhat interested in wearables, with almost half of this group (30%) already actively using them.

The remaining consumers are either neutral (17%) or don't see the value in wearables for health tracking (21%).

The 25 to 44 age group show the most potential for adopting wearables in the future. They are 1.3x more open to it than the overall population (42% vs 33%), but only if the products are proven to be affordable and effective.

Tracking activity and movement is the metric that appeals most to consumers, collecting 42% of votes. Also of interest are heart rate and stress monitoring (39%), sleep quality (36%), as well as air quality and home environment tracking (17%).

More than half (53%) of consumers would be interested in a device that automatically adjusted the environment at home, based on a wearable. More than a sixth (18%) would be very likely to use this.

Sleep quality & home environment

Sleep-enhancing household products are popular, with most people trying out one or more, with less than a third (32%) of consumers not using any.

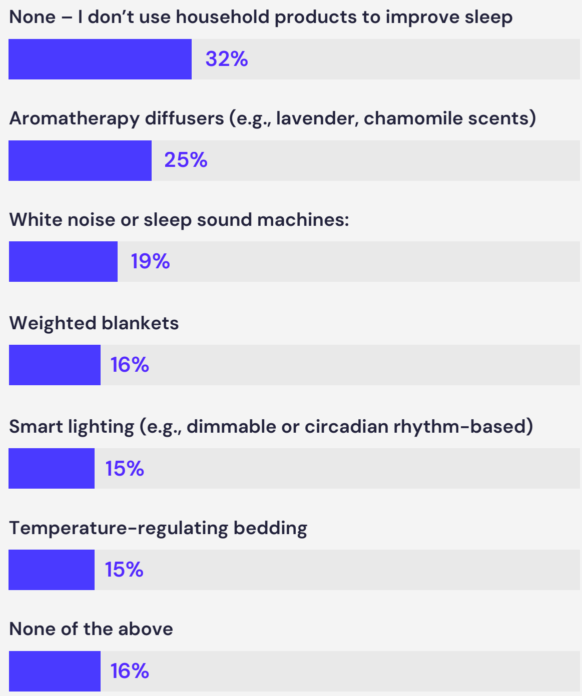
Aromatherapy diffusers are the most well-used or well-known household product for improving sleep. Almost a quarter (25%) of consumers have tried or considered these. Also popular are white noise or sleep sound machines (19%), weighted blankets (16%), smart lighting (15%) and temperature-regulated bedding (15%).

Despite the importance of good sleep, there is a reluctance to spend on sleep-related household products - possibly indicating price sensitivity or scepticism. Two in five (42%) consumers would not spend anything at all, for over 55s, this sentiment rises to almost three in five (57%).

However, there are some consumers who would be willing to invest in better sleep. Overall, a third (34%) of people would pay up to £25, rising to almost half (45%) for those with children at home. Nearly two in five (19%) would pay up to £50, again increasing a little (to 23%) for households with children. And just a small segment (6%) of the population would be willing to pay over £100 for sleep-related products.

The concept of a smart home system which is optimised for sleep appeals to slightly over one in two (53%) consumers. And almost one in five (19%) are strongly interested in this idea.

If a restaurant promoted using regenerative ingredients, what would you assume?



Multi-answer sent to a nationally representative sample

Minimalism in the home

As minimalism in the home gains ground, we asked consumers which aspects of it appeal to them. Decluttering was the most popular, securing 42% of votes. Other motivations included having a calm, stress-free space (33%), the appeal of multi-functional products (23%) and sustainability concerns (20%).

Younger consumers aged 18-34 show higher interest in sustainability (28%) and a calm home (38%) than the overall average.

Three in five (60%) consumers are open to the idea of smart minimalism - where technology is used to reduce home clutter, with over a sixth (18%) very enthusiastic about it. Consumers under the age of 34 are almost twice as likely to strongly embrace smart minimalism (32% vs 18%).

When it comes to reducing clutter with multi-functional household products (that replace multiple items), the positive responses were even stronger. More than two-thirds (68%) of respondents were open to the idea, with more than one in five embracing it strongly (21%). For parents, the response is even higher.

This contrasts with some of the scepticism consumers have regarding multi-functional skincare. This could indicate that shoppers are more inclined to trust multi-purpose items that are less intimate, such as household appliances, rather than beauty products.

And finally, two-thirds of the population (68%) are interested in multi-functional household products that replace multiple items - with one-fifth (21%) loving the idea. Again, parents are some of the strongest supporters of this trend.

Key takeaways

1. Minimal processing in food and beverages matters

Minimal processing is attractive to consumers, especially when it comes to plant-based foods and sleep-support products. However, not at the expense of taste and price point. Brands who can weave these three factors together stand to benefit most.

2. Increased demand for transparency in restaurants

Consumers want and expect natural ingredients from food services, at no extra cost. They also want to know exactly what they are eating. More transparency around processing and protein levels is likely to boost engagement from diners, as they increasingly consider the health impacts of their choices. Restaurants could increase trust by adding a "Minimally processed" label to healthier options.

3. Strong potential for athleisure to expand into health & wellness

Supplements, hydration products, and skincare have strong crossover appeal with athleisure, especially for regular (but not daily) exercisers. As athleisure consumers prioritise value for money over brand recognition, the market is promising for newer entrants. To get seen, products should be positioned in supermarkets, online marketplaces and sports retailers.

4. Minimalist beauty gains traction, especially for older consumers

Sleep-focused beauty remains niche, with consumers prioritising skincare benefits over sleep-enhancing claims. However, there is a rising trend towards minimalist and multi-functional beauty, with older consumers especially invested. To encourage minimalist skincare adoption, brands should emphasize: Clinically backed all-in-one solutions, cost savings compared to multi-step routines and dermatologist endorsements.

Key takeaways

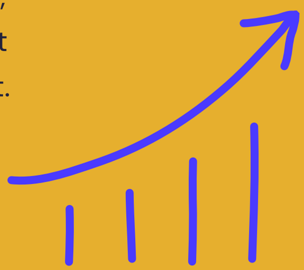
5. Wearables gain traction for heath tracking, with affordability key

Wearable technology appeals most to consumers under the age of 44, who use them to track activity, stress and sleep. But only if they are affordable. Smart home integration with wearables also has potential but requires better consumer education.

In summary

Transparency is at the heart of the new natural, helping to build trust and relevance with consumers. They are hungry not only for visibility in their food choices and menus, but also across their activity, stress and sleep levels. Clarity and awareness is key. While some consumers admit that they probably wouldn't change their selections - especially if it is tasty food in a restaurant - most would appreciate the enhanced transparency.

As well as demanding more visibility over their products, consumers are still highly price conscious. Across all categories and especially wearable technology, affordability is key. In-line with the minimalist trend, consumers want value for money. Brands that can provide this stand to gain the most. The ground is fertile for new market entrants, as consumers are less impressed by brand recognition.



Getting ahead of these trends now with a strong value proposition, multi-functional designs and enhanced transparency could benefit brands enormously. After all, the new natural could one day become the new normal.

Part 4

Generational wealth

Finding commercial opportunity in an underserved segment

In-brief

Despite controlling a significant portion of global wealth, older generations, particularly **those aged 55 and above, often feel overlooked by mainstream consumer brands**.

With **60% of the UK's wealth concentrated within 30% of the population**, predominantly those over 50, the **imbalance in marketing focus is striking**. The prevailing trend among brands is to target Millennials and Gen Z, neglecting the economic power of older demographics who are capable of and willing to spend more on products that meet their needs.

This report seeks to bridge the gap by **investigating the behavioural, attitudinal, and commercial opportunities presented by this under-targeted segment**. We explore how wealth shifts influence shopping behaviours across industries, whether current branding and product strategies align with older consumers' expectations, **and how businesses can pivot to better capture this affluent demographic**.

A loyal consumer base, waiting to be seen

Despite feeling underrepresented, older consumers show strong brand loyalty, especially in categories like grocery and health & personal care. Yet many still feel that products aren't designed for them. Brands that make even small shifts to acknowledge and serve this group could see immediate impact through long-term trust and retention.

Natural products and quality claims drive engagement

Health-conscious claims like "natural", "low sugar", and "locally sourced" resonate deeply with the over-55s. Simple, honest messaging paired with high-quality ingredients offers a winning combination, especially when paired with familiar formats like in-store discovery and trusted brand names.

Retail is ripe for redesign

Older consumers want accessibility, clarity, and convenience, but they often don't see it reflected in online platforms or physical spaces. From high-street layouts to E-commerce UX and packaging readability, subtle design improvements could unlock significant commercial gains across categories from food to household care.

In this section, we uncover where brands are falling short with consumers and where the biggest growth opportunities lie by understanding, respecting and designing for underserved consumer segments.

Highlights

The 65+ demographic is the only group that **does not list price as the top priority** in supermarkets, instead they value quality and freshness of ingredients.

Page 105

Two thirds (66.6%) of consumers over the age of 55 **do not use delivery food apps**. For those who are 65 and older, this rises to 77%.

Page 117

When it comes to online shopping, **high delivery costs were voted as the biggest turn-off** by more than one in five consumers (22%).

Page 124

Consumers are generally loyal to their brands, with just one in ten (11% saying that they never return to a health & beauty or personal care product.

Page 126

Two thirds (68%) of consumers **buy cleaning and home products in-store** at supermarkets or specialty stores.

Page 139

Food and beverage

Different demographics show distinct preferences and behaviours in supermarkets. Some of them may be natural, while others could be societal - for example, if one age group feels excluded it could affect their views and decisions. This section examines the data in detail, offering brands insights and suggestions for market opportunities.

Perceptions of inclusion

Consumers aged 65 and over are more likely to feel that supermarket food and beverages are not designed for their age range. More than one in ten (11%) believe this firmly, against a population average of 9%.

The next age group down, the 55 to 64 years demographic, also feels somewhat underserved, with one in ten (10%) expressing that they have not been considered.

Combining these two groups together, over-55s are more than twice as likely to feel overlooked compared to the 25-34 age range (11% vs 5%).

Older consumers also demonstrate more ambivalence towards supermarket food and drink in general. More than half (52%) feel neutral, compared to a population average of 43%, further suggesting that they are underwhelmed or uninspired by what's currently on offer.

Across all age groups, brand loyalty is strong. Three in five (60%) consumers stick to the same products and companies they have used for years, with almost one in ten (9%) doing so every time. The most loyal age group is 25-to-34, where two-thirds (66%) use the same brands always or often. This could be because they may be busy with time-intensive careers or small children and look for less decision-making and more efficiency in supermarkets.

Strikingly, even though the over-55s feel the least cared for when it comes to supermarket food and drink options, they are just as loyal as other groups. This presents an interesting gap in the market. For brands who can appeal to this underserved segment, they could benefit from enhanced loyalty.

All ages are concerned about inflationary pressures on grocery prices, but some more than others. Today's 55-64 year olds, for example, are 1.2x more likely to be very worried about this compared to the average (65% compared to 52%). And 1.6x more than 18-24 year olds (65% vs 42%).

Interestingly, this is not the case for the 65+ year olds, who seem to be slightly less nervous about inflation (52% vs 65%) than those ten or more years younger.

Behaviour differences

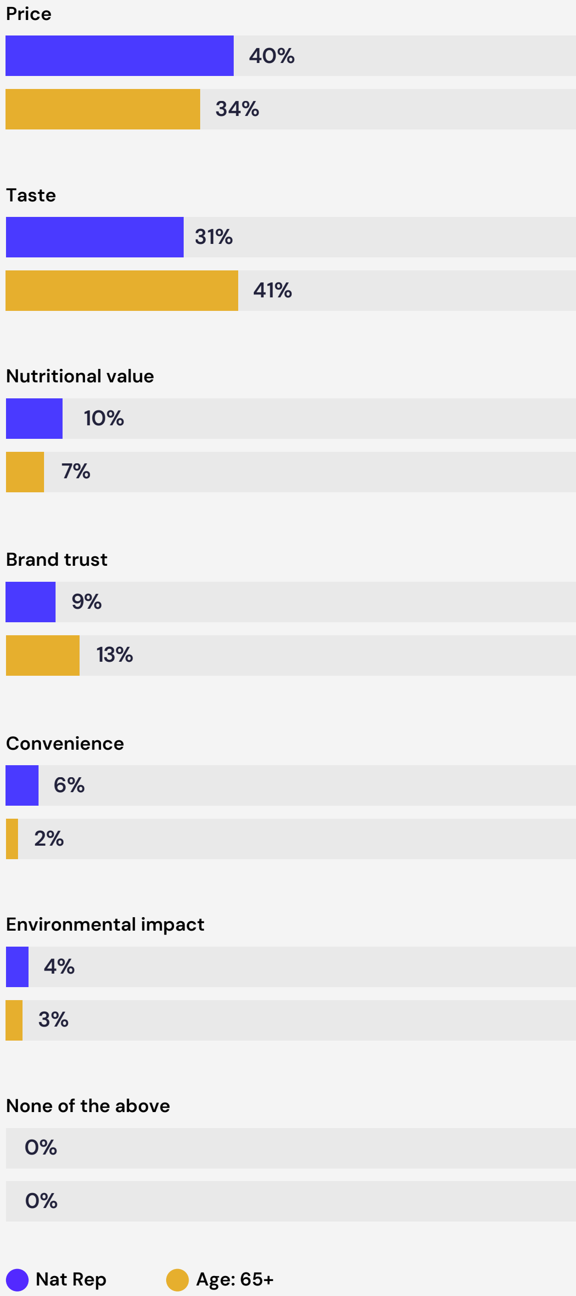
As consumers of all ages browse through the supermarkets, two in five (40%) prioritise the price, showing a cost sensitivity.

For the 55-64 age group, who are more worried about inflation, price is even more of a priority (45% vs 40%). This could be because they are coming up to retirement age and have more of a focus on preparing their savings for the future.

Interestingly, retirees themselves seem to be less cautious about taking care of the pennies. For this group, price comes second (34% of votes), with taste being the most important influence (41% of votes).

Over-65s are 1.3x more likely to prioritise taste than the population average (41% vs 31%). And they are also 1.5x more likely to buy foods from a brand they trust (13% vs 9%). This could be promising for established producers looking to create tastier choices, designed for older shoppers.

Which factors most influence your food brand choices?

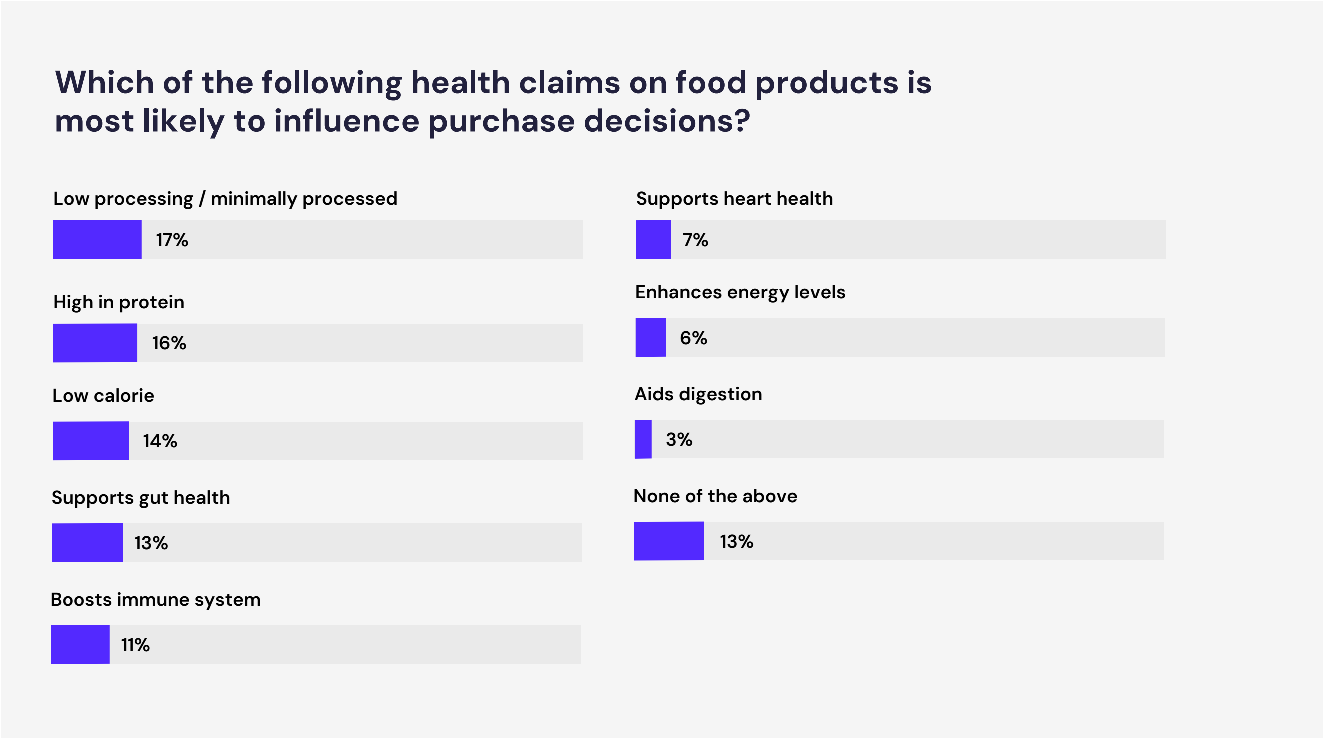


Over-65s prefer to buy natural food and drink with minimal processing. They are 1.5x more likely to be attracted to this than the population average (25% vs 17%). On the other hand, they are underwhelmed with "high in protein" claims, buying less than half of other age groups (7% vs 16%).

The over-65s also tend to be more sceptical of food or drinks health claims. They are 1.3x less likely to be influenced by them, compared to the population average (17% vs 13%).

The 55-64 age range is generally more aligned overall consumer averages. Low processing levels, high protein and low-calorie products are their preferred options. Although, like over-65s, the 55-64 demographic also has a slightly outsized scepticism towards health claims. (17% vs 13%).

As the over-55s tended to prefer healthy foods and showed some scepticism towards claims, we asked consumers to select the health food claims that could appeal to them.



“Natural” was the most popular for over-55s, garnering 45% of votes, compared to the population average of 37%. The strong preference was driven by the 55-64 age group, who are 1.4x more likely to opt for products with “Natural” claims (50% vs 37%).

“Low in sugar” was also a hit. Over-55s are 1.2x more likely to be attracted by this claim than other consumers (45% vs 36%), and over-65s 1.3x more likely (48% vs 36%).

The claim “supports a healthy gut" resonates well with the 55-64 age group, who are 1.4x more likely to be attracted by this than the average (36% vs 27%). For over-65s, it was less appealing but still more than other age groups (32% vs 27%). Over-55s also showed a preference for “rich in fibre” claims (32% vs 26%).

Breaking from the rest of the age groups, a “Made in the UK” label is slightly more important (37% of votes) to over-55s than a "low in salt” claim (37%), driven by the over-65s.

Along the same lines, over-55s value “local ingredients” or “locally sourced” products 1.4x more than average, with 30% voting this as a preference. Other age groups are less concerned about buying local, with just 22% marking it as a priority. "Know the grower” also resonated slightly more with the 55-64 age group (17% vs an overall average of 12%).

Case study

4.7x boost in product appeal with natural claims

Minimal processing and 100% natural claims resonate strongly across consumers of all ages, but especially for the over-55s.

To test the strength of these findings, we presented respondents with the **same leading brand of honey**, but with two different slogans, and asked which one -if any - they would buy. The brand's currency slogan "for honey heads", received 14% of votes, shrinking to 6% for over-55s.

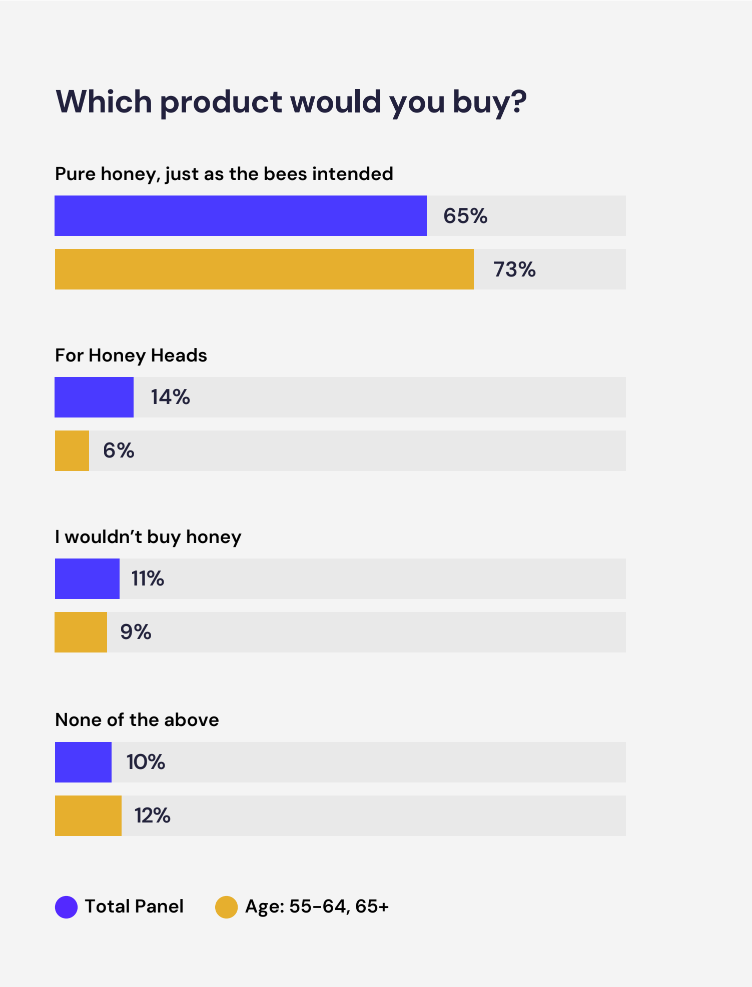
By contrast, the tagline which evoked feelings of nature and minimal processing, "pure honey, just as the bees intended", received 65% of votes, rising to 74% for over-55s.

Our research indicates that consumers across all ages are nearly five times more likely (5x) to purchase food and drink with natural claims (65% v 14%).

For older consumers, the findings are even stronger. Over-55s are 12.5x more likely to purchase food and drink with natural and minimal processing claims, than foods without (74% vs 6%). This trend seems to be most prominent in men aged between 55 and 64, as 80% opted for the natural honey claim.

Over a third (35%) of people over the age of 55 learn about new products from the TV or radio - 6% more than the overall average. Perhaps surprisingly, this is not driven by the retirees (over the age of 65) but by the 55-64 age segment who are approaching retirement. This group is 1.3x more likely to be influenced by TV and radio mentions than the overall average.

Supermarket loyalty programs play a role for 32% of the overall population and 33% of over-55s. And while social media is not as popular with over-55s, it still makes a mark. Around one in six (16%) older consumers find out about new foods and drinks on this channel, just over half the national average (16% vs 28%).

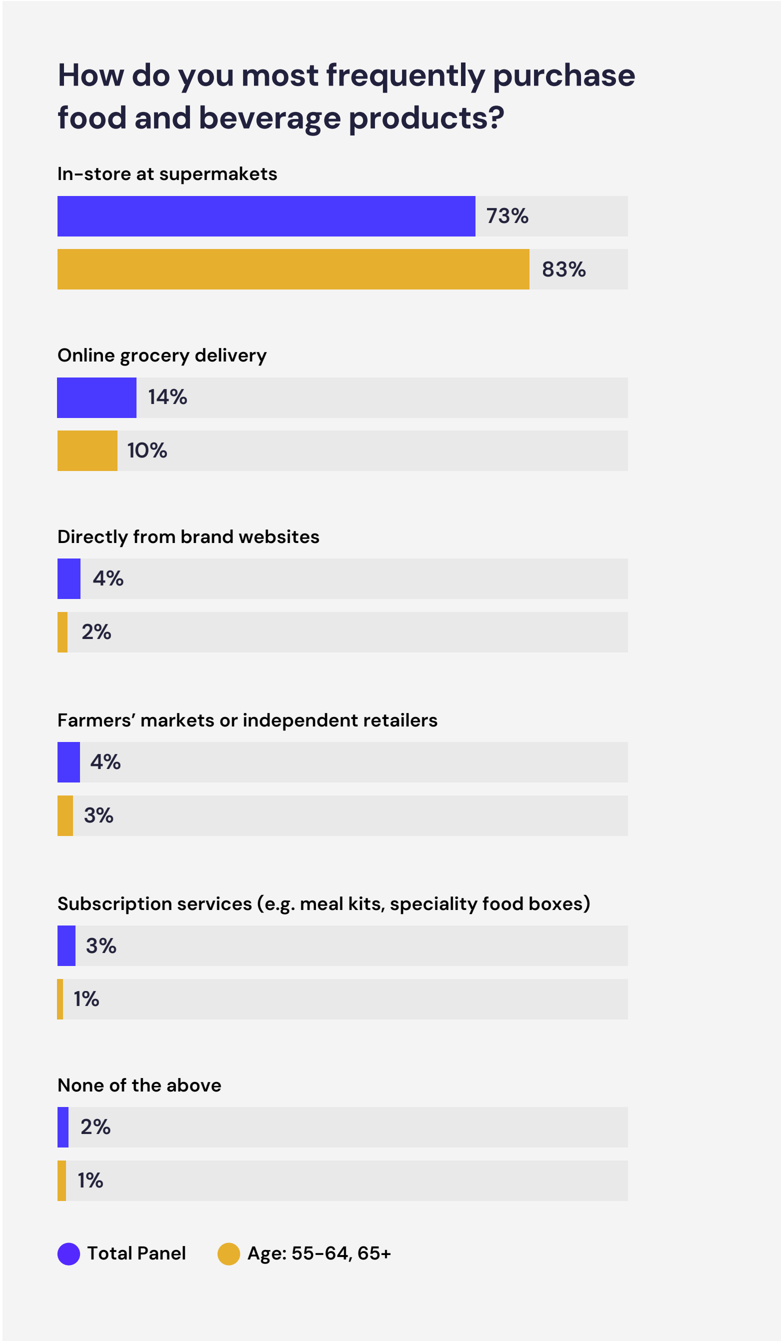


Marketing channels

Three-quarters of consumers (73%) purchase their food and beverages in-store at supermarkets. For over-55s, this rises to 83%, and for over-65s it's 88%. This implies that supermarkets and grocery stores could be effective places to target marketing and products towards mature consumers.

Digging a little deeper, we asked where consumers hear about new food and beverage products, selecting all that applied. We found one in two consumers (48%) learn from in-store displays and promotions. Over-55s are 1.2x more likely to discover new products this way (59% vs 48%), driven by the 55-64 age group (at 65%).

Friends, family and peers are also a common way to learn about new foods and beverages, accounting for 36% of votes overall, and 38% among the over-55s.



Food service

Demographic perceptions of restaurants and take away options reveals a lot about the consumers' different priorities. Food delivery apps, for example, can sharply divide opinions. Yet within these varying outlooks like unique business opportunities and market gaps for underserved segments.

Perceptions of inclusion

Only a third (34%) of over-65s feel that restaurants have been designed for their age group. This is a stark finding, as it sinks well below the overall average of 60%, suggesting that they have been overlooked.

Less than a third (29%) of women over the age of 65 feel that restaurants are designed for them, making them the most underserved group.

Zooming out a little, the slightly younger 55-64 age group feel much more catered for. One in two (51%) agree that restaurants have been designed with them in mind, and within this group, more than one in ten strongly agree (14%, or 7% overall).

So, what happens between the ages of 64 and 65, which can cause this steep decline? One possible explanation is retirement. It could be that retirees or pensioners feel that restaurants are not designed around their different time schedules, socialising hours, diets, accessibility needs or budgets.

On the subject of food delivery apps, the findings are even blunter. Two in five (41%) over-65s outrightly state that these channels have not been designed for their age group. More than a quarter of this group feel it strongly (29% or 12% overall).

There is a more nuanced outlook among the 55-64 age range. One in two (52%) are neutral in their stance, suggesting an indifference. Around a third (31%) agree that the apps have been designed with them in mind, around 10% lower than the overall average (36%). And just a sixth (17%) feel that they have been overlooked.

Loyalty

Although over-55s were the most loyal group towards food and beverage brands, the same cannot be said about restaurants. Perhaps this could be because they feel that many restaurants are not catering to their needs.

We asked consumers of all ages how often they revisited a restaurant they had been going to for years. Interestingly, the youngest group - those aged between 18 and 24 - were the most loyal. Three in five (59%) stay loyal to a dine-in restaurant often, with one in ten (11%) going always. The youngest age group are 1.7x more likely to revisit their restaurants often than the oldest (59% vs 34%).

The 55-64 demographic is are slightly more loyal than the consumers over 65 years. More than two in five (44%) revisit old restaurants at least often. However, very few will revisit the same restaurant always (2%). This implies that they could be on the lookout for something new or underwhelmed with the current options.

The 65+ age group was unusual in that a disproportionate number of consumers (20%) claimed to never stay loyal to restaurants they've gone to for years.

This demographic is twice (2x) as likely to abandon a restaurant compared to 54-65 year olds (20% vs 9%), and three times (3x) more likely than 25-34 year-olds (20% vs 6%).

We reached out to the respondents who voted “never” to understand why they don't feel loyal to restaurants. In the over-65 group, prices came up consistently. However, for most of this age group, it's not so much a question of price but value for money. “I never stay loyal because it's all about price and getting a good deal/promotion regardless", explained one consumer.

There is also a demand for variety, which keeps consumers away from revisiting the same place often.

Somewhat refreshingly, one commentator over the age of 65 revealed that they never stay loyal to a restaurant because they can dine for better and cheaper at home. “I can do the best eating at home", they said.

Interestingly, several focused only on chains - rather than independent restaurants. “We don’t have any chain retailers nearby", commented one. “No national chain restaurants in our town.", said another.

The trend repeats itself in takeout restaurants, with 22% of over-55s stating they never stay loyal compared to only 6% of 18 - 54-year-olds. For consumers aged 65 and over, that rises to 29%, making them 5x more likely to abandon a restaurant than the youngest cohort (29% vs 6%).

Across all over-55s (55-64 and 65+), the people who voted “never” cited a lack of value for money and a need for variety in their take-out options. It's worth noting that these groups also felt that delivery service apps had not been designed for them, so they may not have visibility over the same takeaway options and prices as the younger demographics.

I enjoy a variety of foods and will try various takeaway venues to get a taste of different cultures.

Male 65+

I don't patronise food restaurants; they’re too expensive, and I can cook just as well at home for a fraction of the cost.

Male 55-64

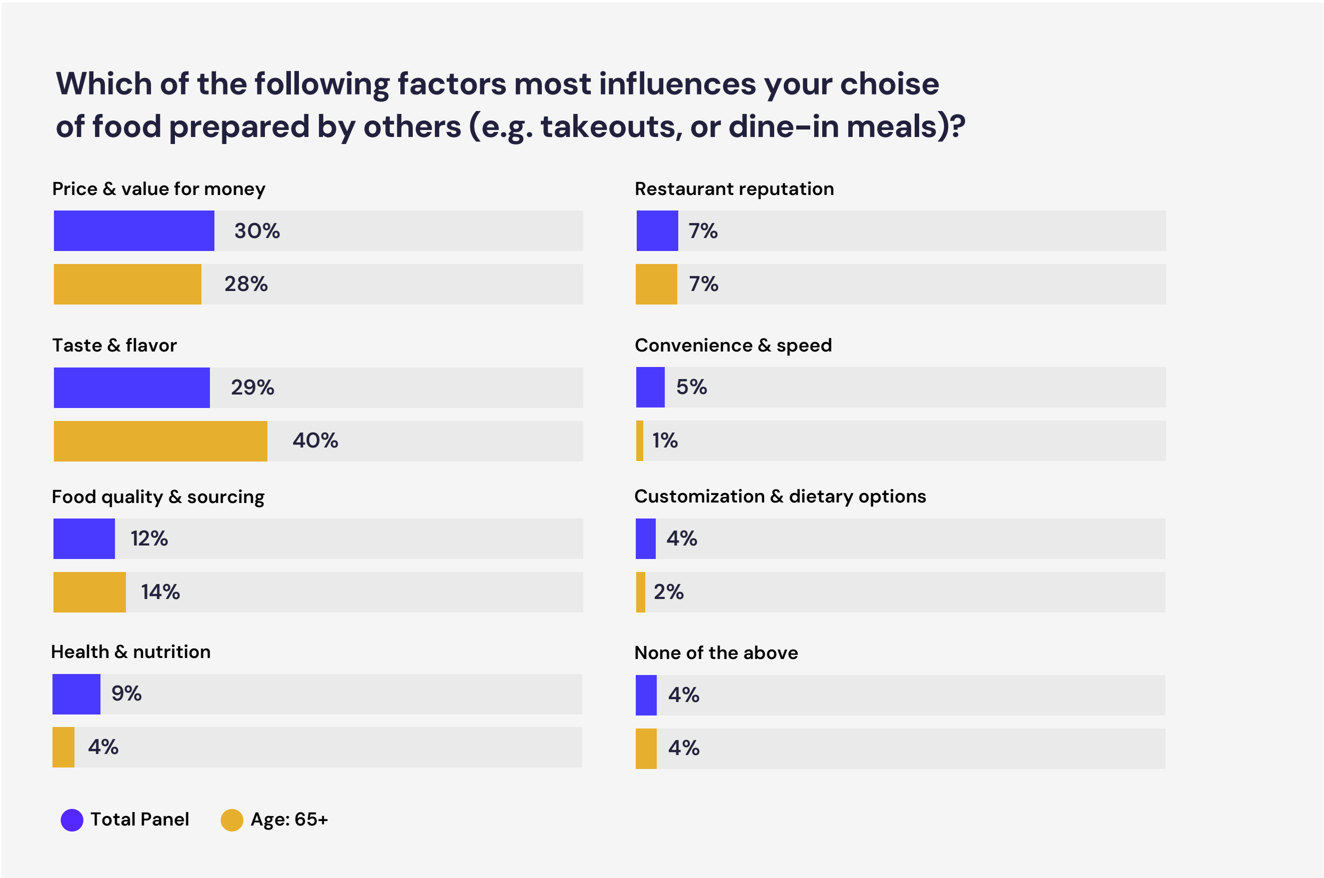
Behaviour differences

Price and value for money are important across all ages, with three in ten (30%) voting this as the most influential factor. Ages 55-64 are the most cost-aware group, with 37% voting for this. The second most price-sensitive age demographic is 45-54, with 33%.

Interestingly, consumers aged 65 and older do not seem to share this concern. With just 28% of votes, this group is the second least affected by price (18% of 18-24 year olds are the least sensitive).

Instead, the most important factor for older consumers is taste and flavour, with two in five (40%) prioritising this. Over-65s are more than twice (2.3x) as likely to pick a place based on taste than 25 -34 year-olds (40% vs 18%).

Older consumers are also the most interested in the food quality and sourcing of restaurants. With 14% of votes, the 65+ years group were the demographic that cared the most, compared to an overall average of 12%. By contrast, the 55-64 years group cared the least, with just 8% of votes.



Although consumers over the age of 65 are more likely to feel that restaurants are not designed for them, they are dining out more than average. Seven in ten (70%) have eaten a meal at a restaurant in the past six months, compared to an overall average of six in ten (62%). Consumers aged 55-64 are also dining out more than average (69% vs 61% over the past six months).

Combined, the over-55s are also more likely than average to have purchased a ready meal from a supermarket (56% vs 49%). This is driven by the 65+ years group (58%).

The data balances out when it comes to takeaways, however. The 65+ years demographic is less than half as likely to order from a delivery app as the overall average (12% vs 35%). And they are also less likely to order from a website (19% vs 36%) or phone (29% vs 35%).

Two-thirds (67%) of consumers over the age of 55 do not use delivery food apps. For those who are 65 and older, this rises to 77%.

The reasons behind this are widespread. For some, the delivery charge was offputting. “I don't like paying a delivery charge, and also, they tend to come back with the food only lukewarm", commented one. “Just the price is high for delivery", said another.

“Never seen the need" was another sentiment that came up several times, implying that many over-55s do not feel that they are missing out.

Mistrust came up too. While some consumers were wary of the “cleanliness of the establishment", others were suspicious about the ingredients. “They are too expensive, and I don't trust the quality of the ingredients used", commented one respondent.

“Lazy” was another word which came up frequently, especially among the 55-64 group, implying that they do not approve of the lifestyle that comes with using food delivery apps. “I'm not lazy, simple as that", said one person. “I think they are expensive and lazy", said another.

It’s an uncomfortable truth but one the food service sector can’t afford to ignore: the 65+ demographic is not where the growth lies. While it's easy to empathise with older consumers who feel overlooked, the data tells a far more pragmatic story. The youngest diners are 1.7 times more likely to return to restaurants regularly than their oldest counterparts and are significantly more active on delivery apps, websites and digital ordering platforms. In contrast, the over-65s show lower loyalty, limited mobility and a clear disinterest or even disdain for modern convenience channels, with over three-quarters opting out of delivery apps altogether. Meanwhile, their stated preference for value over loyalty and tendency to dine at home make their long-term value markedly lower.

For Quick Service Food Restaurants (QSRs) and casual dining outlets, the real opportunity is in doubling down on younger, more digitally engaged consumers. The cost of acquiring a 25 year old already using delivery apps is dramatically lower and the reward in lifetime value and brand engagement is exponentially higher.

As value for money seemed to be a strong factor in decision-making for both takeaway and dining out, we tested some meal deal options to see which would be the most popular.

Case study

Meal deals – how the Under-55s identify value

Using a British **multinational pizza restaurant chain** as an example, we set out to understand how we can raise average order value and maximise the digitally engaged Under 55 consumer segment.

We tested the increasingly popular concept of the 'meal deal', a format that's surged in popularity across UK supermarkets and, more recently, been adopted by McDonald's through their high-profile Stormzy Meal Deal. We set out to explore which meal deal combination delivers the best value for money and more crucially, for which consumers.

What we tested

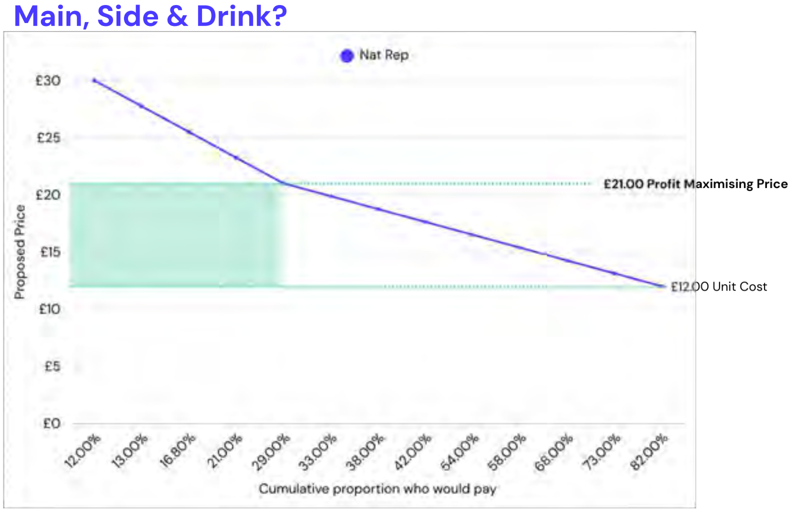
We asked consumers aged 18–54 to choose from three meal deal options. The most popular choice was a main, side, and drink, selected by 35% of respondents. This combination proved particularly appealing to the 45–54 age group (37%) and those aged 25–34 (37%).

What we found

Once the preferred meal deal was established, we tested price sensitivity to identify the most profitable price point. When assuming a unit cost of £12.00, the price that maximised profit was £21 at this price, 29% of interested consumers said they would purchase.

However, when the unit cost was reduced to £11.13, the profit-maximising price fell to £16.50, attracting 54% of potential buyers. Men in the 18–54 age group showed a slightly higher willingness to pay, increasing the ideal price point to £23.25, even at the lower unit cost.

How much would you pay for this meal deal. Main, Side & Drink?



However, when the unit cost was reduced to £11.13, the profit-maximising price fell to £16.50, attracting 54% of potential buyers. Men in the 18–54 age group showed a slightly higher willingness to pay, increasing the ideal price point to £23.25, even at the lower unit cost.

The bigger picture: where the real commercial opportunity lies

But identifying the best deal and price point is only part of the story. The true question is: which consumers are worth targeting, and how can brands activate them efficiently?

For QSR and casual dining brands, the data reveals a clear story that increasing engagement and profit/revenue per head is much more commercially viable opportunity in younger, digitally active audiences:

- Consumers aged 18–24 are 1.7 times more likely to revisit their favourite restaurants regularly than those aged 55+ (59% vs 34%).
- Older consumers show far lower digital engagement. Just 12% of those aged 65+ order via delivery apps, compared to an average of 35%.
- Website (19% vs 36%) and phone (29% vs 35%) ordering rates are also significantly lower among the 65+ group.
- Two-thirds (67%) of consumers aged 55+ do not use delivery apps at all. Among those aged 65+, this rises to 77%.

These behavioural differences matter. The cost of converting an older, digitally disengaged consumer is exponentially higher, and their long-term value is lower due to lower ordering frequency, weaker loyalty, and less appetite for variety.

The real opportunity for brands lies in optimising offers and price points to appeal to digitally savvy, under-55 consumers who are already in the ecosystem and ready to engage.

Marketing channels

Word-of-mouth marketing is still the most effective, with nearly half (45%) of all consumers hearing about dining and food options from their family and friends. Consumers over the age of 45 are 1.6x more likely to do this than consumers under the age of 45. (average of 55% for over 45s vs 34% for under 45s).

Brands could leverage this by encouraging consumer advocacy through referral programs, loyalty incentives, or social sharing could drive strong organic reach.

Beyond personal recommendations, menu leaflets (28%), social media (28%), and restaurant or brand websites (26%) are key promotional touchpoints. Ensuring that meal deals are visually appealing and clearly highlighted on menus, both in-store and online, can significantly impact purchasing decisions.

Food delivery apps (23%) and Google searches (19%) also play a role, reinforcing the need for optimised search visibility and prominent placement on delivery platforms.

Retail

Once emblematic of British life, the traditional high street is making way for retail parks and online shopping sites. In this section, we explore which environments are best suited to different demographics and how brands can leverage these findings.

Perceptions of inclusion

The high street retail environment is a key strategic place for brands to expand their reach. However, there seems to be a strong bias towards the younger demographic.

Two in five (41%) of all consumers under the age of 45 agree that the retail environment has been designed for them, with 7% strongly agreeing. By contrast, for the over-45s, just a third (33%) feel this way, with only 2% strongly agreeing.

The group that feels most overlooked is the 65+ demographic. Only around one in five (22%) feel the spaces have been designed for them, compared to two in five overall (39%). More than a quarter (28%) of over-65s feel or strongly feel that they have not been catered to, which is four times more than the 25-34 age group (28% vs 7%).

When it comes to retail and E-commerce websites, the findings were even starker. Almost one in three (30%) of over-65s felt or strongly felt that the digital spaces were not designed with them in mind, compared to an overall population average of less than one in six (15%).

Consumers between the ages of 25 and 54 were most likely to feel that e-commerce sites had been designed for them, with an average of 45% agreeing or strongly agreeing with this statement.

There was more balance between the age groups for speciality retail stores (such as those at retail parks like B&Q and Halfords). Consumers aged between 35 and 64 feel most at home in these environments. More than half (59%) of this group agree the space was designed for them, with 9% strongly agreeing.

Respondents who felt that the speciality retail stores strongly aligned with their needs elaborated with references to easy parking, good prices and great variety. They also seem to be better suited to different accessibility needs. “I can park easily and access them in a wheelchair as they are bigger. I can get everything in one store", commented one respondent.

“They normally have good parking facilities and a range of shops that I can visit in one go, so I find it can utilise my time better rather than having to travel out to other places, so I value the convenience".

The under-24s and over-65s are more aligned when it comes to speciality retail stores. They are both twice as likely to feel that the stores were not designed for them, but they also both exhibit higher levels of neutrality.

Behaviour differences

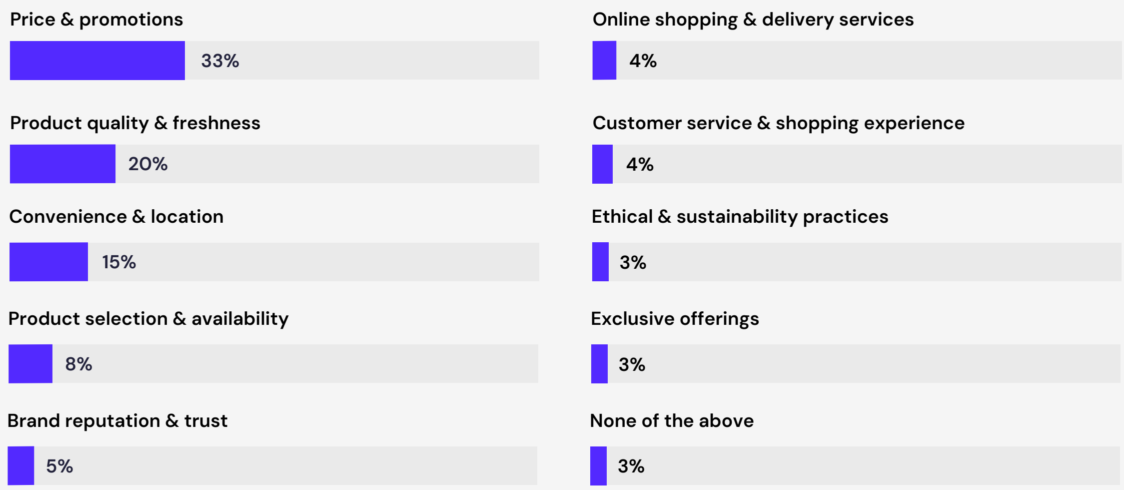
Parking, convenience and accessibility matter to consumers as they consider which retailers to visit, but it is not as important as price and promotions, which was voted the most influential factor for selecting a retail store, garnering a third (33%) of all votes across age groups.

The most cost-aware demographic is the 45-54 age range, with two in five (41%) voting for price and promotions. The next most price sensitive are the decade older group, those aged 55-64 (36%).

Interestingly, over-65s are 11% less price sensitive than the 55-64 age group (27% vs 36%). This could indicate that just before retirement, people are looking after the pennies more closely as they try to boost their savings. Or it could imply that over-65s go shopping less often and splash out more when they do.

The second most compelling driver is product quality and freshness, attracting 20% of votes. For the 65-and-older group, this is the top influencer with 29% of votes. This implies that the eldest consumers will overlook promotions in favour of quality, representing an interesting market for brands.

Which of the following factors most influences your choice of retailer when shopping?

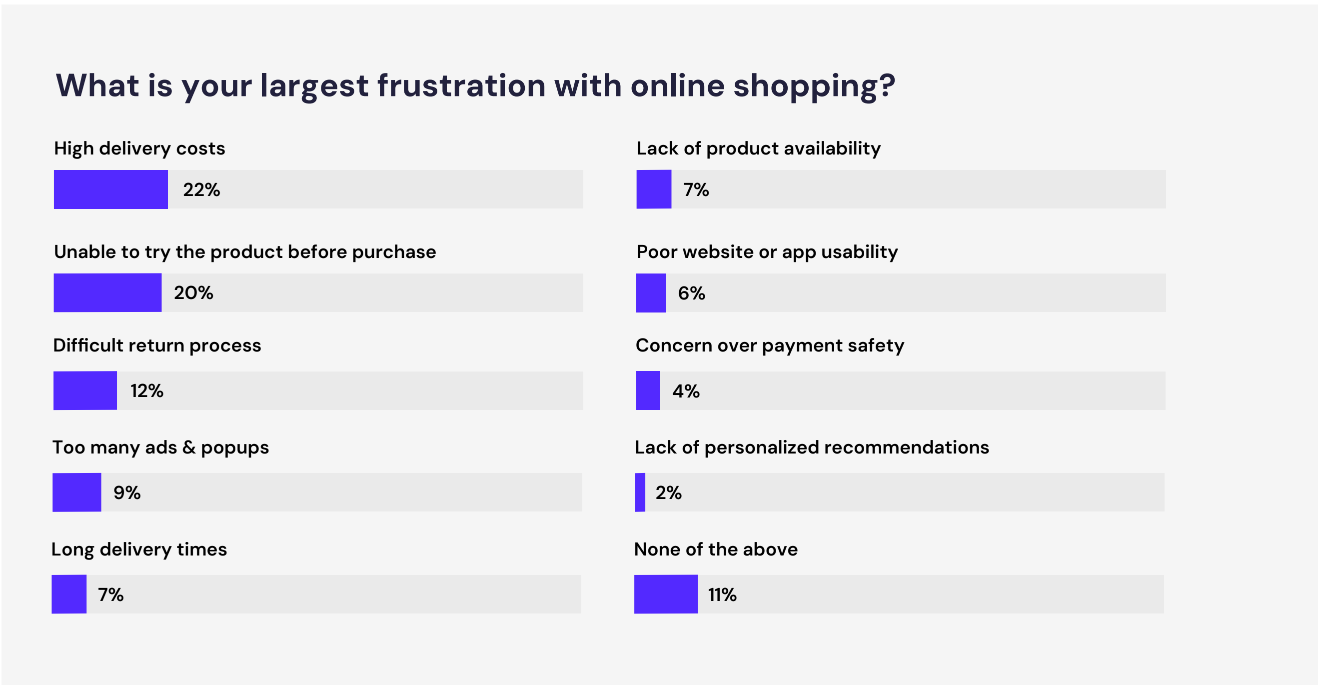


The third strongest influence is convenience and location, collecting 15% of votes. This was the least appealing to the 18-24 age group, with just one in ten (10%) prioritising this. And, it was the most appealing for consumers between the ages of 55 and 64, with more than one in five voting for this (21%).

When it comes to online shopping, high delivery costs were voted as the biggest turn-off by more than one in five consumers (22%). People aged 45-to-54 feel this the deepest, with 26% of votes. Closely following them are 18-to-24-year-olds with 26%.

The group least affected by high delivery costs is the 25-to-34 demographic, with just 14% voting for this. Instead, they are more bothered by not being able to try the product before buying it (18%).

Trying before buying matters to consumers across all age groups and was voted as the second largest frustration with online shopping. One in five (20%) consumers find this irritating. People aged 65 and older were most likely to be annoyed with this, like the 25-34 age group, it was voted their top online shopping frustration (29%).



Marketing channels

We asked UK consumers how they like to learn about new retail innovations. The results were fairly broad, with no stand-out winners.

In first place, a third (33%) of consumers selected social media. Perhaps surprisingly, this is the preferred channel for the 35-44 age group, with more than two in five (45%) votes. It was also the firm favourite of 25-34 year olds, also with over two in five votes (45%).

In a close second, 32% of all consumers prefer to learn about new retail innovations from friends, family and peers. This was driven upwards by the 55-64 age group (34%) and the 25-34 group (35%), who both value the personnel recommendations of others.

Third place went to loyalty card programs (31%), where the mid-to-older consumers reign supreme. This was voted as the top choice for 45-to-54 year olds (30%), 55-to-64-year-olds (37%), as well as the 65+ group (29%).

However, it is also interesting to note that all ages value loyalty cards as a channel to learn about new innovations. For example, younger consumers aged 18 to 24 are twice as likely to learn from a loyalty card than an influencer (23% vs 11%).

Health, beauty & personal care

The question of health, beauty and personal care can ignite gender and generational divides. Younger men, for example, could have very different perspectives, influences and motivations from their older counterparts. This section lifts the lid on some of the most chasms, identifying appetite among underserved segments.

Perceptions of inclusion

In general, UK consumers feel that the health, beauty and personal care products available have been designed with them in mind.

More than two in five (42%) agree with this sentiment, driven largely by the 35-44 age range (53%) and 45-54 group (53%).

Men are less inclined to agree with this than women (36% vs 48%). Two-thirds (33%) of men aged 65 and older outright disagree, with half of this group disagreeing strongly (50% or 11% overall). Rather than simply selecting "neutral" - as 42% of men over 65 did - disagreement tends to indicate dissatisfaction or frustration. For brands, developing a product for older men could fill an underserved market.

Consumers tend to show strong loyalty to their health, beauty, and personal care brands. Just one in ten (11%) say they never return to a product once tried. In contrast, over half (54%) use the same item often, and one in ten (10%) say they always repurchase the same product.

Women are more likely to remain loyal to their preferred products than men. In fact, men are almost three times (2.8x) more likely to never return to a product. This could reflect a sense of dissatisfaction or the perception that products are not designed with them in mind.

Loyalty is strongest among the 25–34 age group, with three in five (62%) saying they use the same products either often (52%) or always (11%). Within this group, women show slightly higher loyalty than men, with 66% using products often or always, compared to 59% of men.

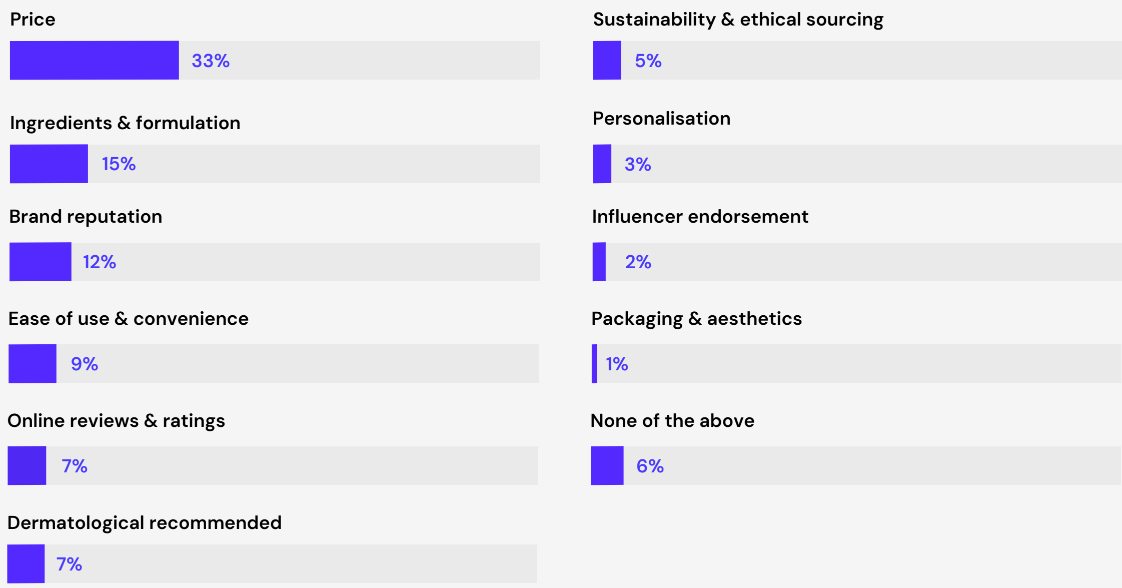
Behaviour differences

When considering health & beauty or personal care products, price is by far the most influential factor for consumers. With a third (33%) of all votes, it's more than twice as important as the ingredients and formulation (33% vs 15%), almost triple the brand reputation (33% vs 12%) and more than triple ease of use and convenience (9%).

Consumers say that packaging and aesthetics matter the least, with just 1% of votes. Influencer endorsement, personalisation and sustainability come low on the list too, with just 2%, 3% and 5% of votes.

The youngest consumer group (aged 18-24) cares most about price (23%), ingredients and formulation (18%), and dermatologist-recommended claims (12%). They are more than twice as likely to be influenced by dermatologist claims as the 35-44 age group (12% vs 5%), and almost three times more than 45-54s (12% vs 5%).

Whict of the following factors cost influences your choice of health & beauty/personal care products?



This could be because younger people may be more inclined towards breakouts or skin issues. As social media feeds become saturated with unqualified advice, this group could also place more value on accredited experts.

Consumers over the age of 55 (in both groups 55-64 and 65+) are quite aligned in their influences. Price is the top concern (34%), although slightly more for the 55-64 category, (36% of votes vs 33%). Ingredients and formulation (15%) and brand reputation (14%) are the second and third most important.

Consumers over 65 years tend to value the product's ingredients more than brand reputation (16% vs 15%). For 55-64-year-olds, it's the other way around, with 14% favouring brand reputation and 12% prioritising ingredients and formulation. But the votes and sentiment are comparably similar.

Across all consumers, around 7% said that they were not influenced by anything regarding health & beauty or personal care products. This doubled for men, rising to one in ten.

When we asked why, we received a range of answers. One man aged 55 to 64 replied, "I tend not to buy anything like that. Soap and shampoo, that's it".

Another answered that they were most influenced by scent, "the smell is the main thing, along with effectiveness", they said.

With price taking centre stage for health & beauty and personal care products, we set out to find where the line lies between quality and cost-effectiveness. The data revealed distinct differences between the demographics.

Overall, consumers are willing to pay more for better skincare, garnering 42% of votes. The 18-24 age group were the least willing to spend in this category, with less than a third (32%) prioritising quality over price. This could reflect their smaller wallet share.

By contrast, the age group above them (25-34) were much more willing to spend on quality skincare. Almost one in two (47%) are prepared to spend more in this category. This could reflect a move into the workforce, more spendable income or noticing the first signs of ageing.

Fragrances are the next category where consumers are willing to pay more for better quality. Almost a third (29%) of consumers will pay more, driven by the 55-64 age group, who are 1.3x more likely to open their wallets wider (37% vs 29%).

In third place came oral care, with 28% of votes across all consumers. The 18-24 category were least likely to pay extra for this (13%), while the 45-54 age range was most prepared to spend more for better quality (34%).

Men had a slightly different prioritisation from women; they would be most willing to spend on oral care (32%), skincare (31%), men's grooming (29%) and fragrances (28%).

For men over the age of 55, oral care takes the top spot (35%), followed by grooming (34%), indicating a continued focus in better-quality shaving, hair care, and self-maintenance routines.

Case study

Men's skincare - testing on pack message resonance

Our research reveals that men aged 18-54 feel underserved in the health & beauty and personal care market.

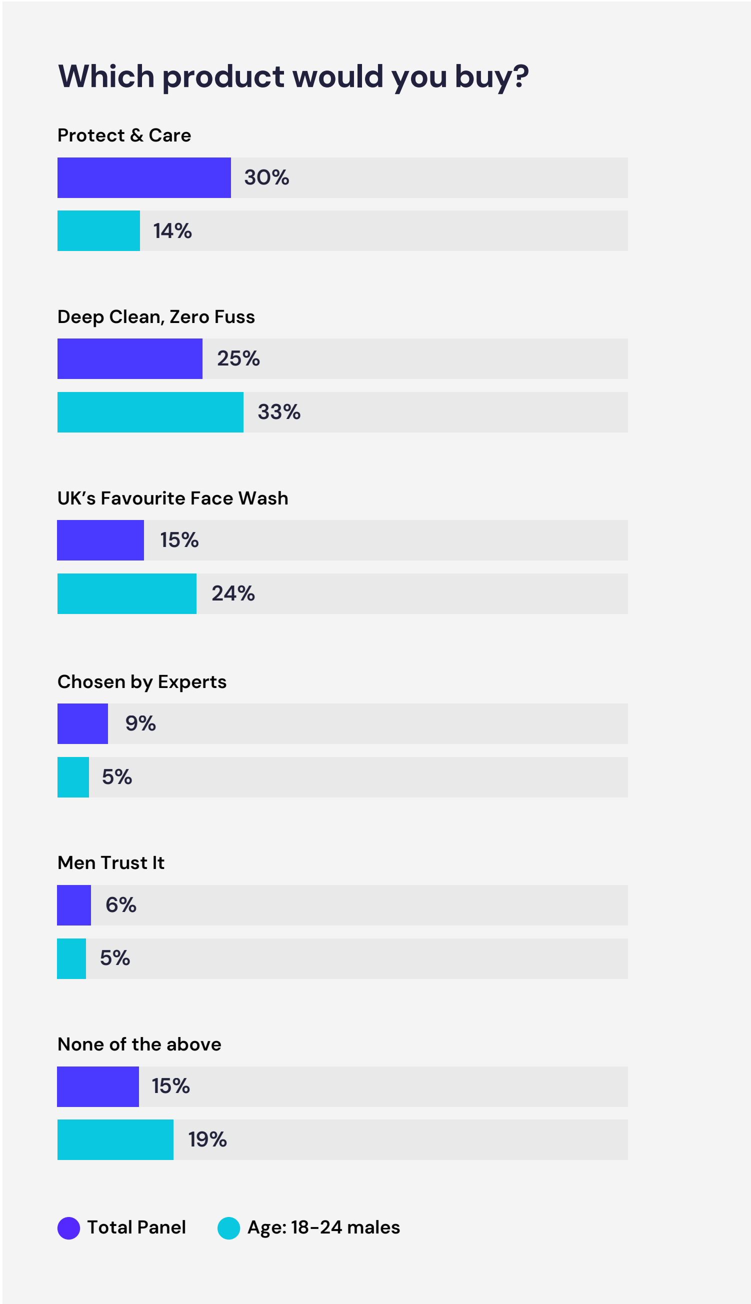
They are almost twice as inclined to trust influencer endorsements too (3% men vs 2% women), and men between the ages of 18-24 are five times likelier (9.% vs 2%).

As men tend to value higher quality skincare products, we tested some on-pack messaging with a well-known face wash.

First we experimented with different claims, to test some of our findings.

The current message of the well known brand, “Protect & Care” was the most appealing on-pack claim across all consumers, just under a third of votes (30%). Although, men were slightly less inclined to choose this option, with 27% of votes, but it was still the most popular. Young men were especially underwhelmed, with less than one in six 18 to 24 year-olds (14%) and less than one in ten (8%) of 25-34 year olds opting for this. The men who were 65 or older, however, were among the biggest fans, with over a third (35%) selecting this option.

In second position was “Deep Clean. Zero Fuss", appealing to the convenience and quality mindset of consumers. This picked up a quarter of votes overall (25%) and was slightly more popular with men (27%).



“Deep Clean. Zero Fuss” was the favourite for 18-25 year old men, collecting one third of votes (33%).

A long way third, with half the votes of “Protect & Care”, was “UK's Favourite Face Wash”, with around one in six votes (15% overall and 15% for just men).

We then tested the appeal of each on-pack claim individually to remove the influence of direct comparison. Interestingly, across all consumers, “UK’s Favourite Face Wash” had the highest appeal at **88%, with a similar level of approval among males aged 18-54 (87%), suggesting broad resonance.**

Comparing this to previous results, “Protect & Care,” which had the highest exclusive preference, saw a slightly lower standalone appeal (85% total panel, 84% males 18-54). Interestingly, "Men Trust It," which was notably stronger among males in all preferences, had a similar approval rating (84% total panel, 85% males 18-54) but did not outperform other claims.

"Chosen by Experts" (86% total panel, 86% males 18-54) and "Deep Clean. Zero Fuss" (85% total panel, 86% males 18-54) also performed well, with little variation between groups.

These results suggest that while “UK’s Favourite Face Wash” has widespread appeal, other claims like “Chosen by Experts” and “Deep Clean. Zero Fuss” resonate nearly as well, particularly among the male 18-54 segment.

Key Take away: Refining "Protect & Care" to Better Engage 18-54 Males

The split-by-steer test results suggest that while "Protect & Care" has broad appeal, its effectiveness in engaging males 18-54 is less pronounced. Compared to "UK's Favourite Face Wash" (88%) and "Chosen by Experts" (87%), "Protect & Care" (84%) had slightly lower standalone appeal in this demographic.

Given that this group already feels underrepresented in personal care products and is less engaged with ingredient-based claims, "Protect & Care" may not be as compelling as alternatives like "UK's Favourite Face Wash," which outperformed it in both exclusive and all preference tests.

Additionally, the 18-54 male demographic values reviews more than formulations, suggesting that claims emphasizing social proof or expert endorsement may be more effective. Based on this, there is a strong case for the leading brand to replace or refine "Protect & Care" with a message that better aligns with this group's purchase behaviour and engagement levels.

Marketing channels

More than a third (35%) of consumers hear about new health & beauty or personal care products from their friends, family and peers. People aged between 55 and 64 are 1.2x more likely to find this more influential than the population average (42% vs 35%).

Social media is another place where consumers learn about new products. Almost a third (32%) voted this as an influential channel, rising to two in five (42%) of 18 to 24-year-olds. Men in this age group are slightly less likely to be influenced than women (37% vs 48%), but still more than the population average.

Across all consumers, traditional media like the TV or radio, high street exposure, and online ads also play a significant role, garnering 28%, 28% and 25% of votes, respectively. Influencer recommendations, meanwhile, remain a smaller but notable factor (10%).

Household and cleaning products

Traditional avenues for household and cleaning products are still going strong. The supermarket is at the centre of shopping experiences, and many people are content. However, some spots could need cleaning up. Around half of consumers are facing challenges that brands could address.

Perceptions of inclusion

When it comes to household products, consumers over the age of 55 feel slightly less catered for, with fewer (47%) agreeing that these products are designed for their age group, compared to the population average (52%).

They also show higher neutrality (45.%), suggesting a lack of strong brand connection and a slightly greater likelihood to disagree (8%), indicating potential gaps in product design, usability, or marketing for this demographic.

We asked consumers if they faced any challenges around buying home care or cleaning products. Over one in five (22%) do not face any, rising to a third (34%) for those over the age of 65. Around one in five (22%) are satisfied with the current options, rising to one in four (25%) for the 55-64 age group.

Turning to the 56% of consumers who do face challenges, two in five (40% - or 23% of the overall population) struggle with fragrances or ingredients that don't suit their preferences.

Too many or too few product choices is the second largest problem, getting 36% of the votes (21% of the overall population). Next, with 36%, was a limited availability of eco-friendly products (or 19% of the overall population). In fourth place came the hard-to-read packaging, making up 26% of challenges (15% of the overall population). And in fifth place was a lack of ergonomic or easy-to-use designs, with 16% of votes (9% of the overall population).

While consumers over the age of 55 generally experienced fewer challenges, they are 1.5x more likely to struggle with hard-to-read packaging (21% vs an average of 15%).

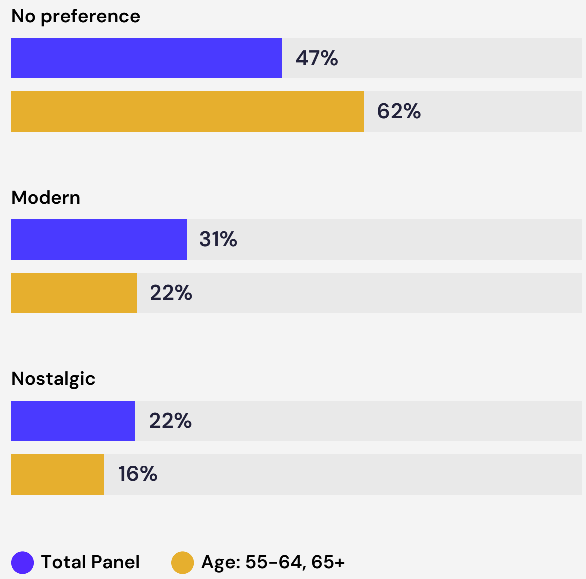
We ran some tests to see if consumers would feel more comfortable using nostalgic packaging, which would possibly feel more intuitive and familiar. This could help to alleviate some of the pinch points around hard-to-read packaging or accessibility of designs.

When asked directly, consumers over the age of 55 are far more likely to have no preference (62%) compared to the overall population (47%). This suggesting packaging style is less of a deciding factor for them.

They also show less preference for modern (22%) and nostalgic (16 %) designs compared to the overall average (31% and 22%, respectively), indicating that functionality and clarity may matter more than aesthetics.

Since older consumers don't explicitly express a preference for nostalgic packaging, it's likely not a primary driver of choice when asked directly. However, subtle nostalgic cues in design (for example, with familiar colour schemes, classic branding elements) could still resonate emotionally without them consciously identifying it as a preference.

Do you prefer modern or nostalgic packaging in cleaning & home care products?



Case study

Readability preferred over nostalgia

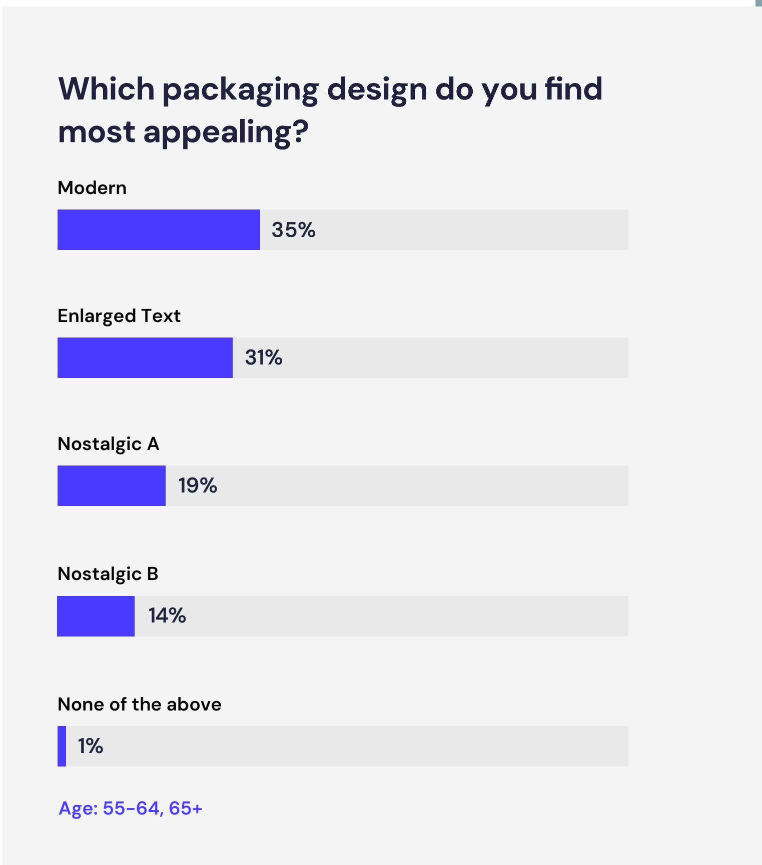
To explore this concept, we asked consumers over the age of 55 which design of the **household brand washing-up liquid** they found the most appealing.

The different packaging options spanned several decades from the 1960s (when they were children) up to modern day.

The results suggest that among older consumers (55-64, 65+), modern packaging (35%) and enlarged text (31%) are the most appealing options, significantly outperforming both nostalgic designs (19% and 14%).

This reinforces the idea that this demographic's functionality, particularly readability, matters more than aesthetic familiarity. While nostalgia isn't entirely dismissed, it ranks lower in preference, indicating that subtle cues may be more effective than full retro designs.

The low "None of the above" response (1%) suggests that most consumers found at least one option suitable, further supporting the prioritisation of accessibility improvements over a design overhaul.



Marketing channels

Two-thirds (68%) of consumers buy cleaning and home products in-store at supermarkets or speciality stores. For over-55s, this rises to more than four in five (83%), and for those who are 65 or older, it's nearly nine in ten (88%). This could suggest that they value physical selection and familiarity.

Online delivery services such as Ocado are a long way second, with less than a sixth (15%) of consumers opting for this. For over-55s, this shrinks to just one in ten (11%). Consumers aged between 25 and 34 are about twice as likely to use this option, compared to over-55s (19% vs 11%).

Buying directly from brand websites and subscription services also sees minimal uptake, accounting for just 7.9% and 5.8% of consumers overall.

Key takeaways

1. Older consumers represent an extraordinary market gap

Despite holding the majority of wealth, consumers aged 55+ feel overlooked by brands. With 60% of the UK's wealth concentrated in this demographic, businesses have a major opportunity to better serve their needs.

2. Health and natural ingredients matter

The 55+ age group prioritises minimally processed, natural foods, with claims such as "100% natural" and "low sugar" driving purchase intent. Brands that align with these preferences can secure stronger loyalty.

3. Retail and E-commerce gaps exist

While speciality retail stores perform well among older consumers, high-street retailers and e-commerce sites are often perceived as not catering to them. Accessibility issues, high delivery costs, and difficulty returning items are key barriers in online shopping.

4. Traditional marketing channels remain effective

Unlike younger demographics, the 55+ age group relies on supermarkets, TV or radio, and word-of-mouth for product discovery. Digital strategies like influencer marketing have minimal impact on this audience.

Key takeaways

5. Loyalty differs by category

While older consumers exhibit strong loyalty in grocery shopping, they are less committed to dining and takeout services. Their lack of engagement stems from limited options catering to their tastes and preferences.

6. Packaging and messaging adjustments can drive sales

Simple changes such as clearer packaging, larger text, and messaging that emphasizes natural ingredients can significantly improve engagement with the 55+ demographic. A case study on honey branding showed a 4.7x increase in purchase intent with revised messaging.

In summary

Older consumers represent a **lucrative yet under-served market**, offering significant commercial opportunities for brands willing to adjust their strategies. By focusing on product alignment, accessibility, and effective communication through trusted channels, businesses can build loyalty with this influential demographic.

Implementing small but impactful changes, such as **clear, natural product claims and senior-friendly packaging**, can unlock long-term value in an older consumer segment.

Vypr

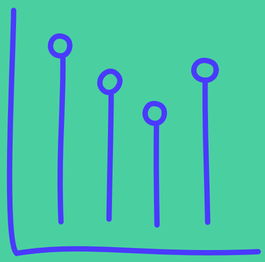
Conclusion

Findings from Consumer Horizon, May 2025.

Conclusion

Consumer demand is pushing brands to deliver **better results for their health and for the planet.** And, with increasing numbers of shoppers willing to test out new market entrants, the race is open to all. As the pressure mounts, partnerships between specialist brands and established retailers could prove to be the most effective strategy.

Smaller sustainable brands need the marketing might of larger corporations to turbocharge awareness and education into the mainstream. They also need the recognition and familiarity of larger players, to boost consumer trust. Meanwhile, the larger brands may be lacking the 100% sustainable and 100% natural business models that shoppers are hungry for. Working together – rather than in competition – market players of all sizes are likely to achieve more.



We've outlined in this paper the most compelling ways to attract consumers, depending on their demographics. While there are clear overarching trends, **there are also nuances, gaps and opportunities that need addressing**.

The clearest example of this is **the deeply underserved older segment**. Brands and consumers are equally missing out, as over-65s are willing to spend more on something that caters for their needs. This paper provides data-driven suggestions to help reach out to this overlooked group.

Creating better products can be a win for everyone; corporates, consumers and our planet too. This research is our way of helping achieve that. **We hope that it offers inspiration and ideas for brands to deliver positive returns, in every sense of the word.**

Partner with Vypr to Lead the Market

Now is the time to act on these insights.

As you shape your strategies for the coming year, consider how Vypr's **data-driven approach can support your business in staying ahead of the curve with vast insights and product intelligence.** Whether it's through refining your product offerings, enhancing customer engagement, or driving sustainable practices, the actionable insights Vypr can provide can empower you to make informed decisions that resonate with today's consumers.

Don't just react to change—lead it. Contact us today to learn how Vypr can help your brand navigate the future of retail with confidence and success. Together, we can shape the industry's future, one insight at a time.

www.vyprclients.com