Generational wealth

Targeting the over-55s

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.

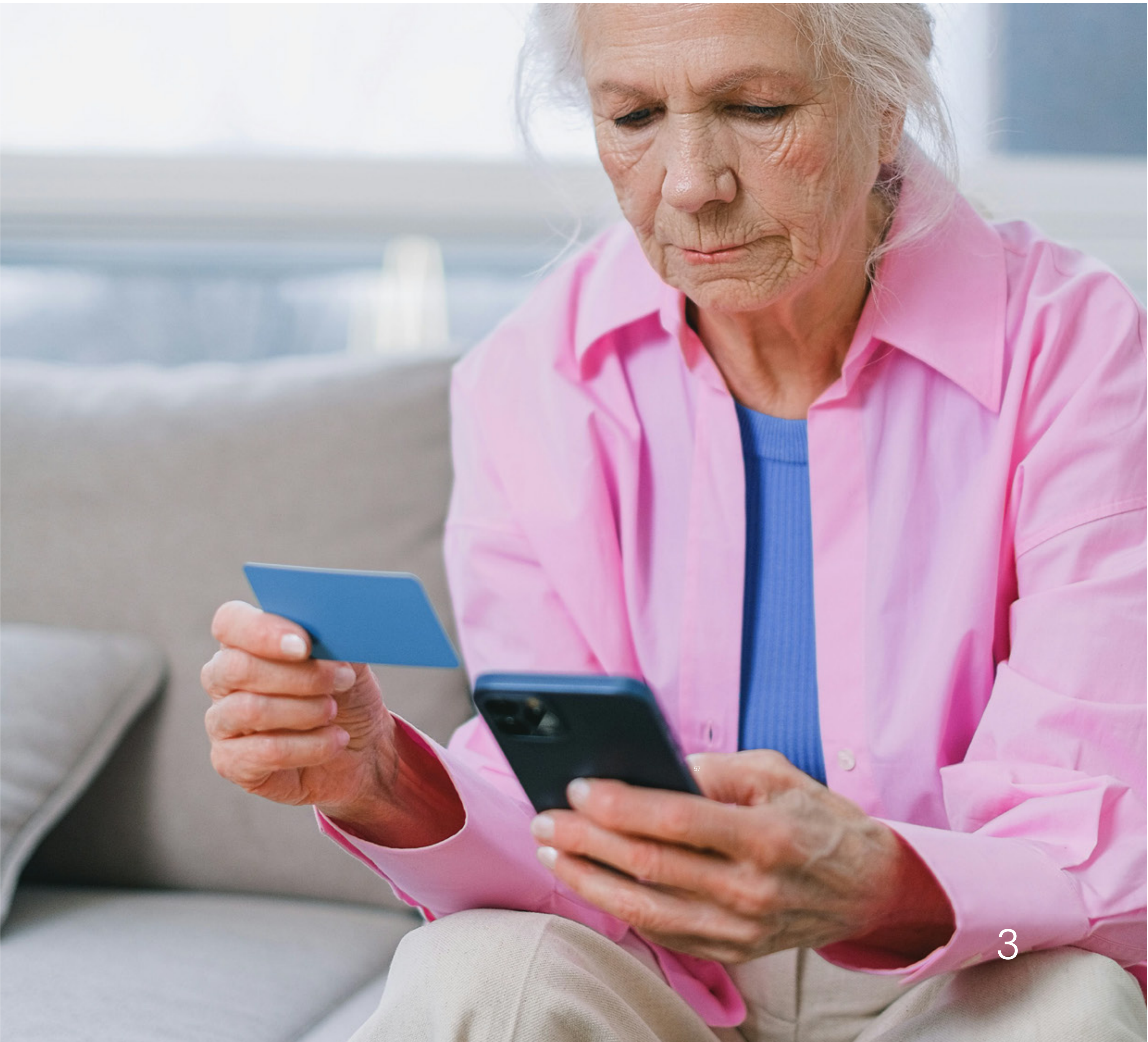
Natural products and quality claims drive engagement

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.

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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%.

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

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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.

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

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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

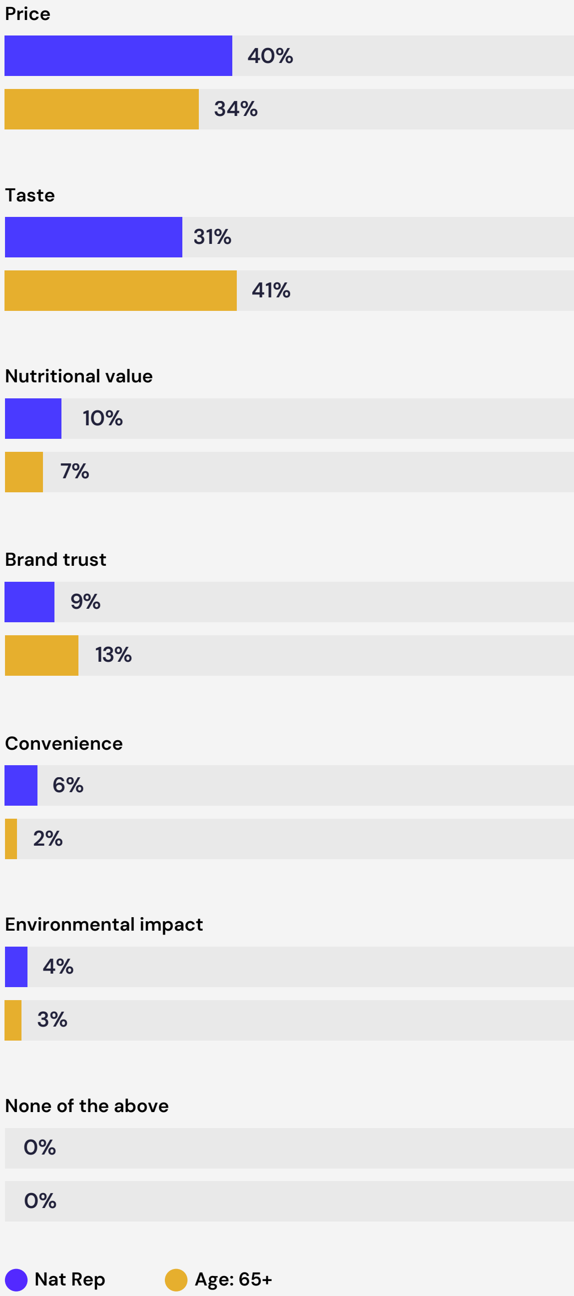
As consumers of all ages browse through the supermarkets, two in five (40%) prioritise the price, showing a cost sensitivity.

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?



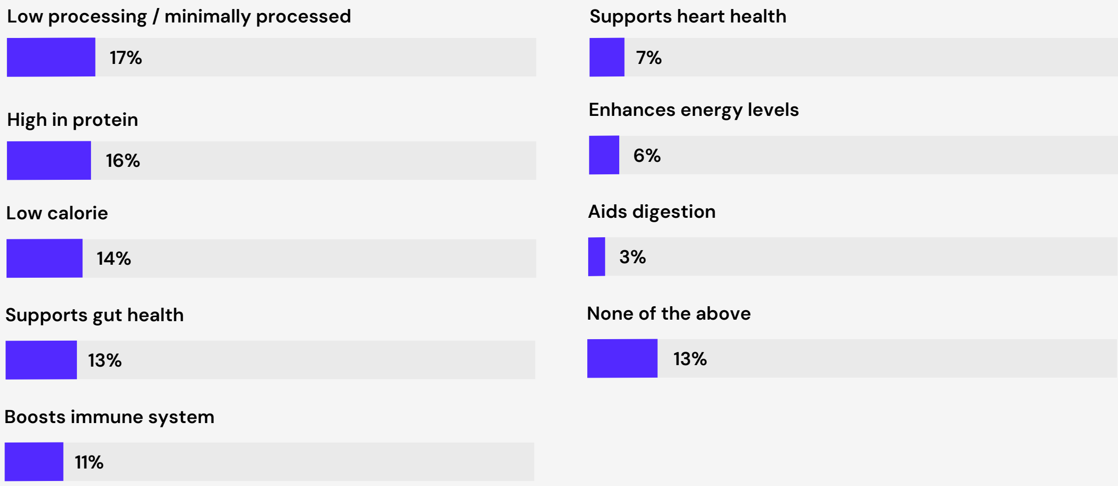
Over-65s prefer to buy natural food and drink with minimal processing. They are 1.5x more likely to be attracted to this than the population average (25% vs 17%). On the other hand, they are underwhelmed with "high in protein" claims, buying less than half of other age groups (7% vs 16%).

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.

Which of the following health claims on food products is most likely to influence purchase decisions?



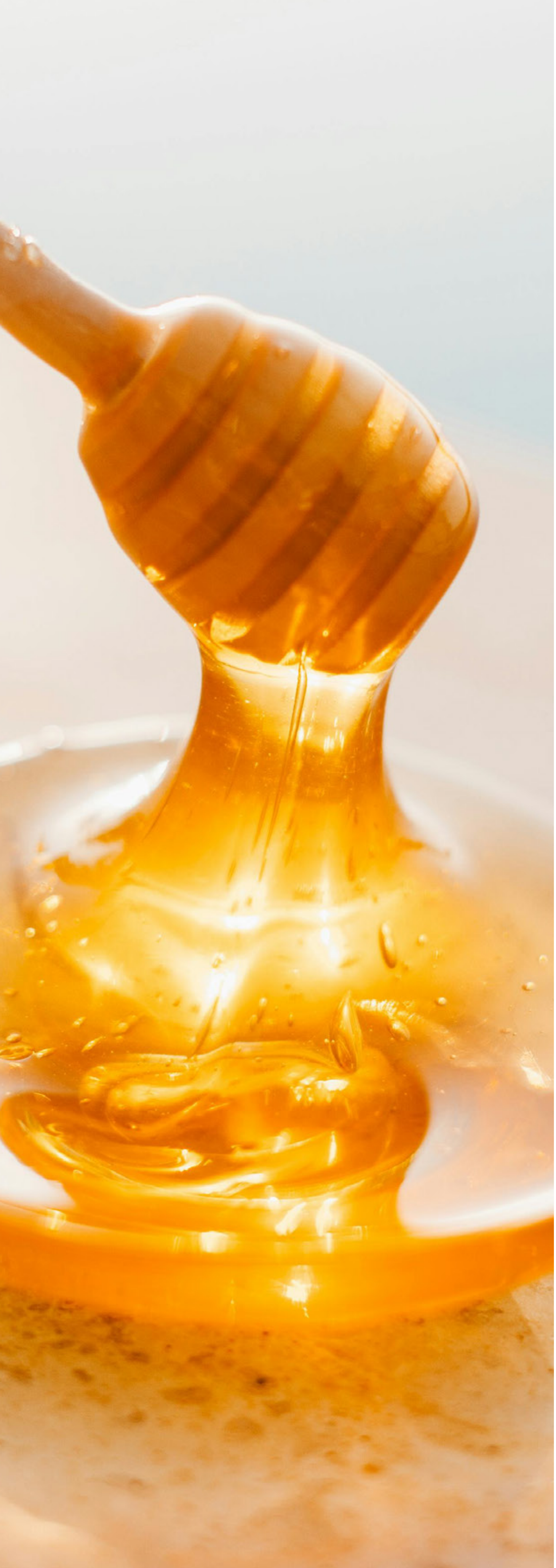
“Natural” was the most popular for over-55s, garnering 45% of votes, compared to the population average of 37%. The strong preference was driven by the 55-64 age group, who are 1.4x more likely to opt for products with “Natural” claims (50% vs 37%).

“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.

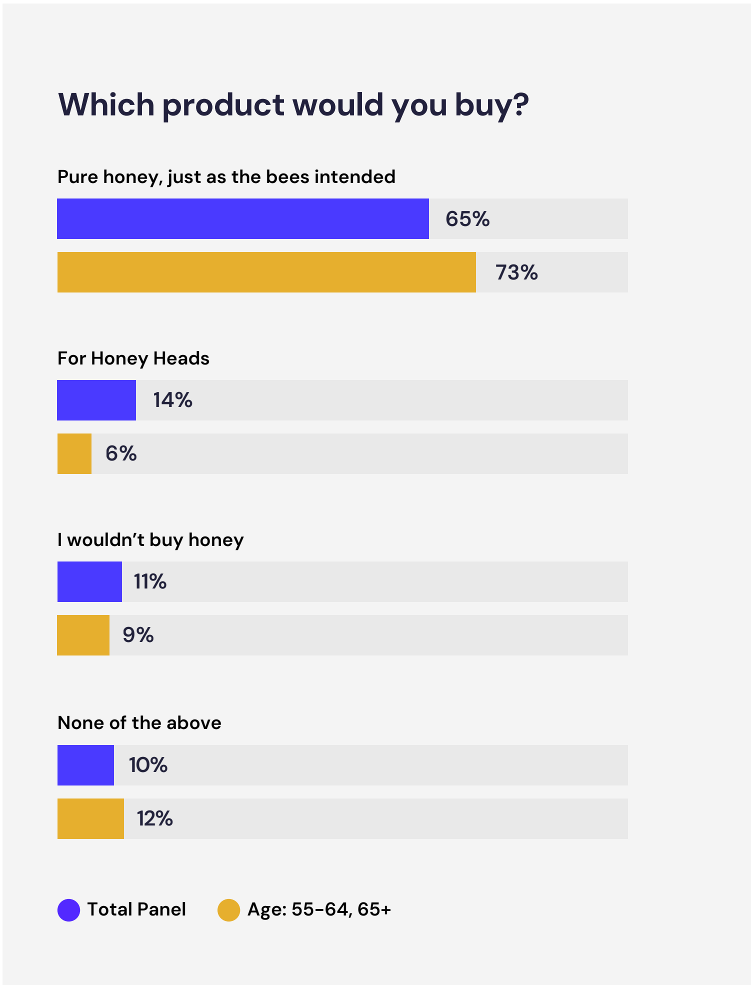
By contrast, the tagline which evoked feelings of nature and minimal processing, “pure honey, just as the bees intended", received 65% of votes, rising to 74% for over-55s.

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%).

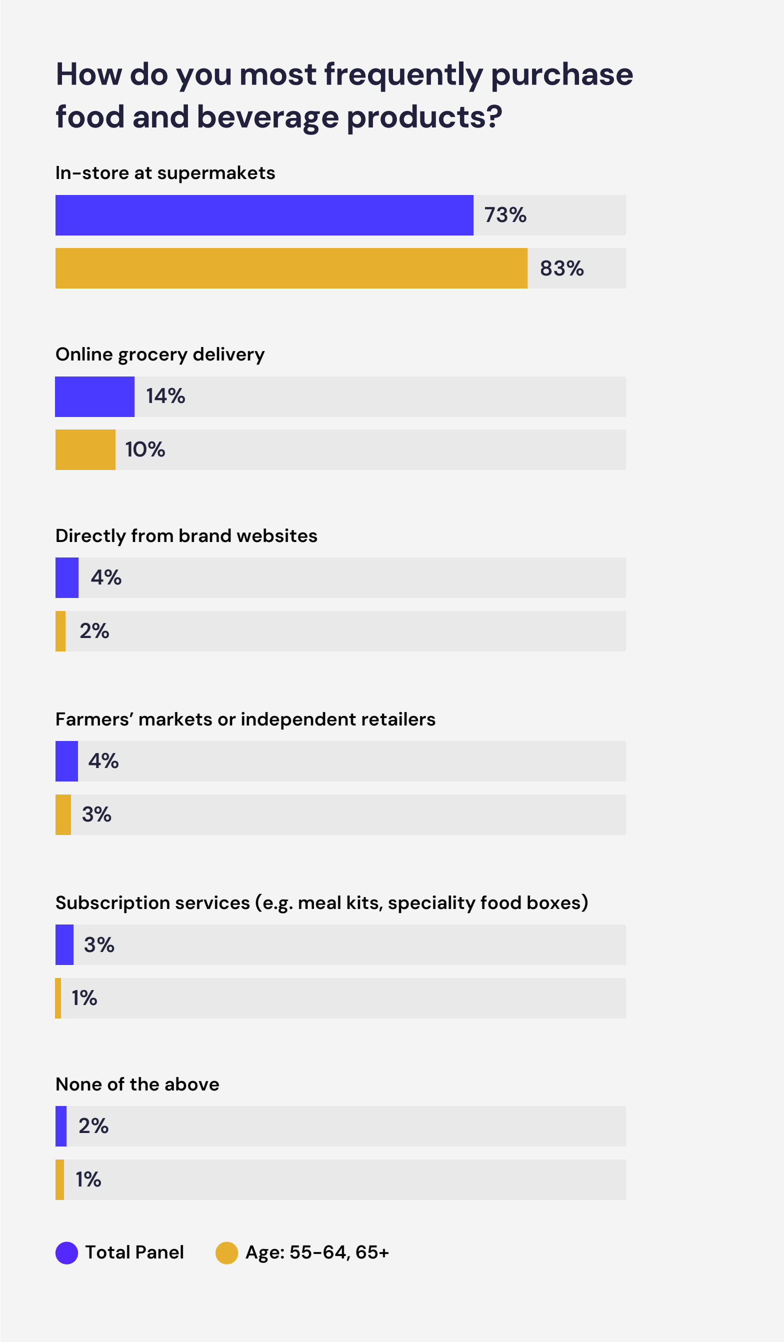


Marketing channels

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

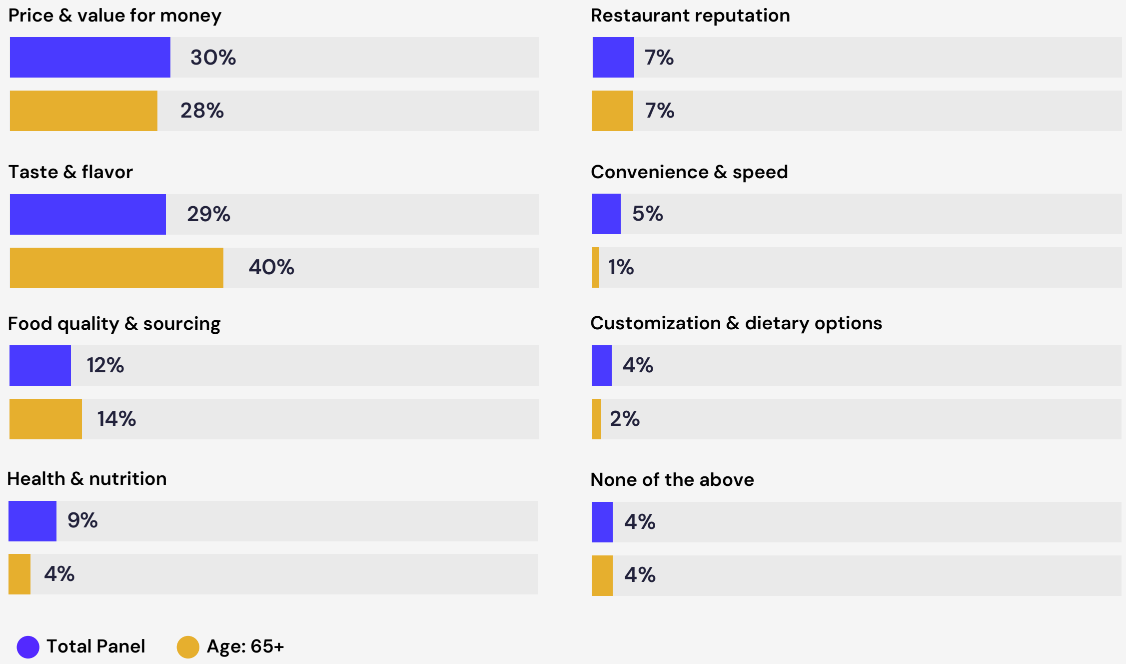
Price and value for money are important across all ages, with three in ten (30%) voting this as the most influential factor. Ages 55-64 are the most cost-aware group, with 37% voting for this. The second most price-sensitive age demographic is 45-54, with 33%.

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.

Which of the following factors most influences your choise of food prepared by others (e.g. takeouts, or dine-in meals)?



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

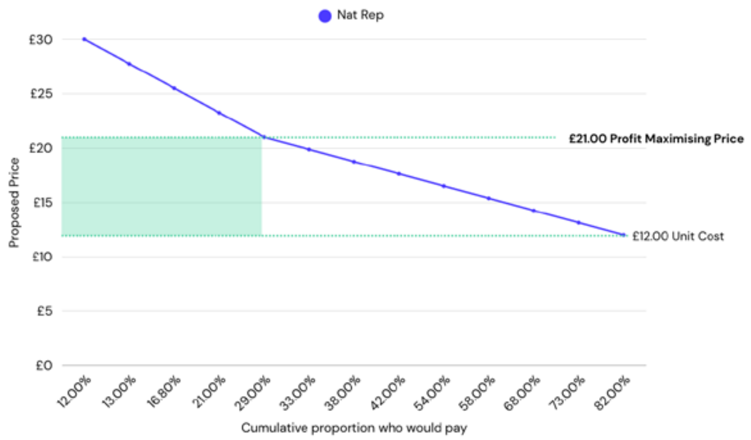
We asked consumers aged 18–54 to choose from three meal deal options. The most popular choice was a main, side, and drink, selected by 35% of respondents. This combination proved particularly appealing to the 45–54 age group (37%) and those aged 25–34 (37%).

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?



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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

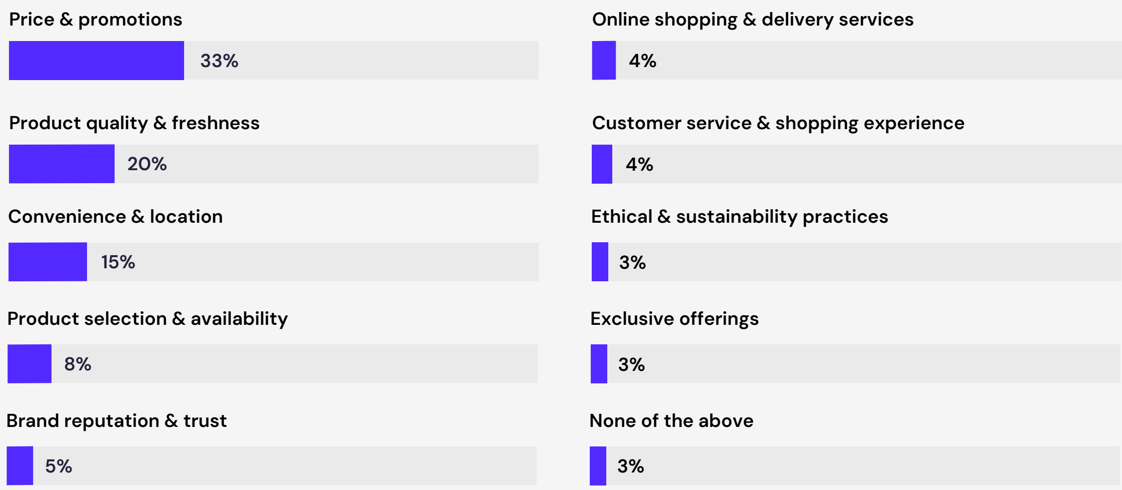
Parking, convenience and accessibility matter to consumers as they consider which retailers to visit, but it is not as important as price and promotions, which was voted the most influential factor for selecting a retail store, garnering a third (33%) of all votes across age groups.

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?

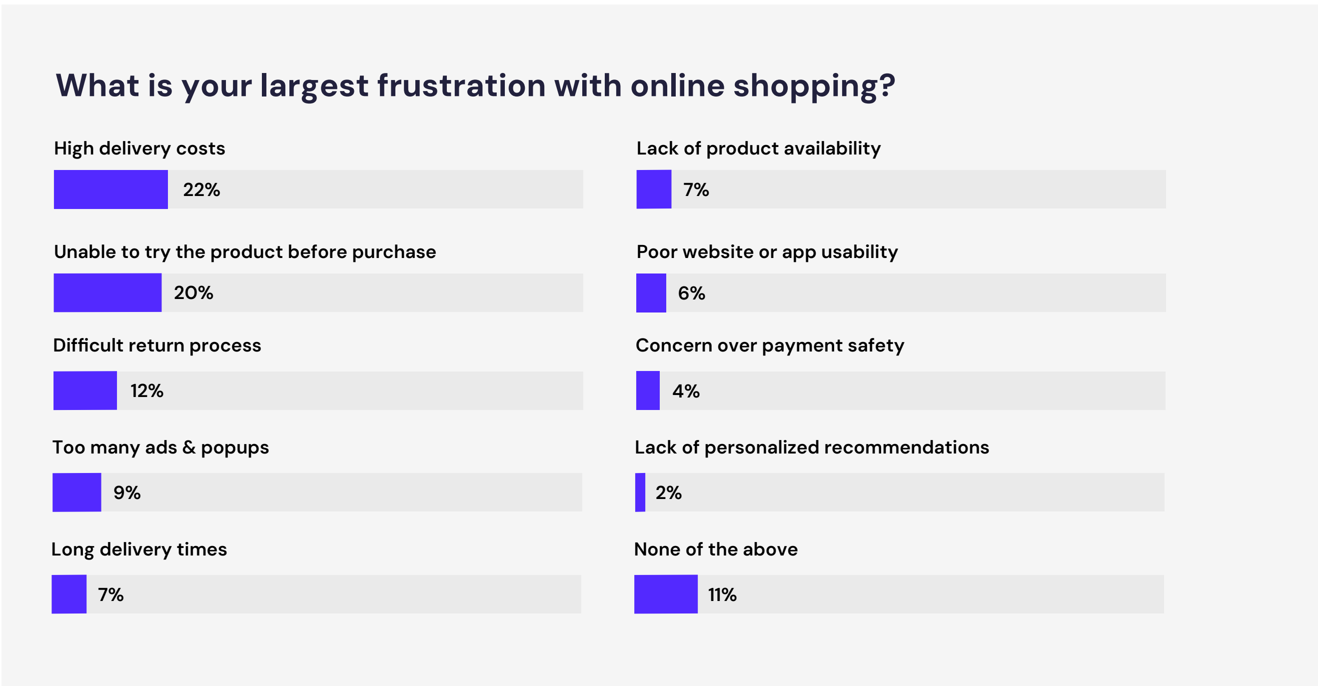


The third strongest influence is convenience and location, collecting 15% of votes. This was the least appealing to the 18-24 age group, with just one in ten (10%) prioritising this. And, it was the most appealing for consumers between the ages of 55 and 64, with more than one in five voting for this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

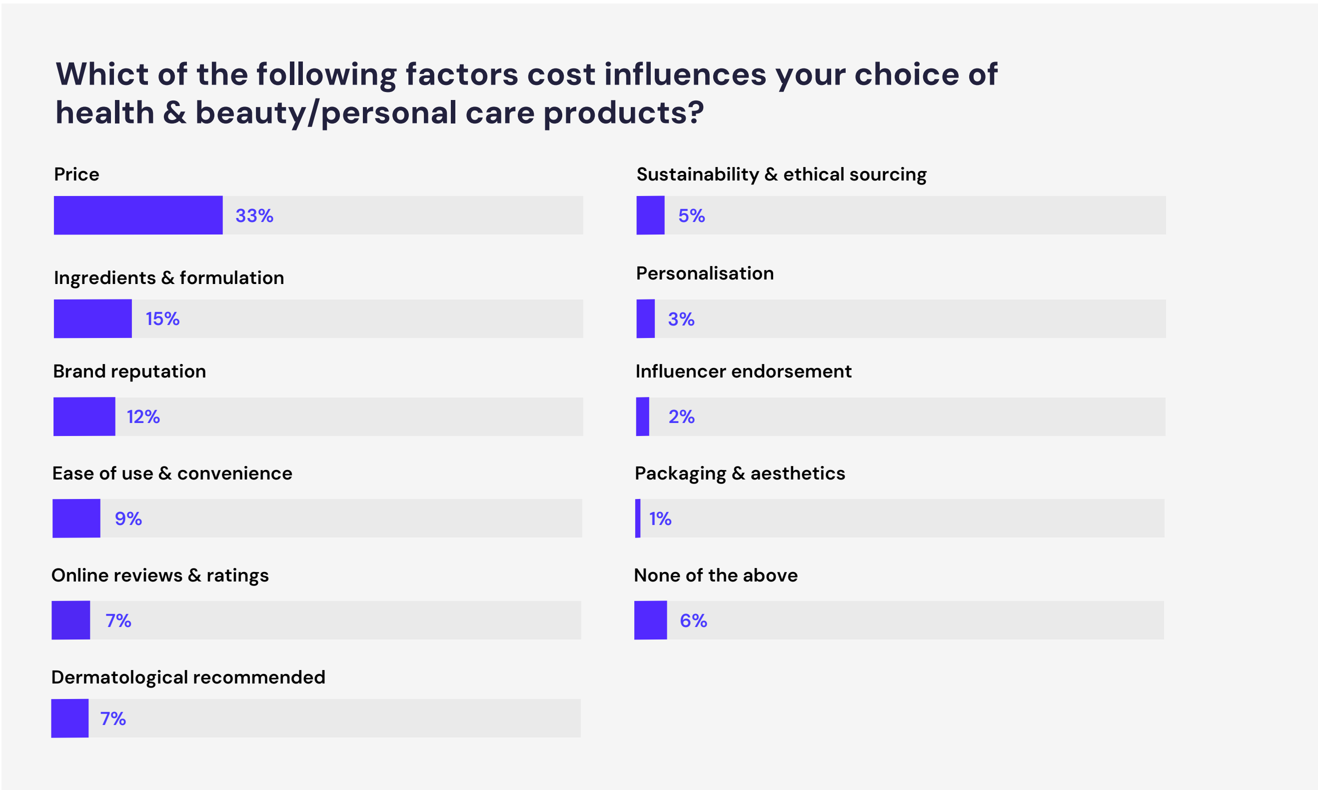
Loyalty is strongest among the 25–34 age group, with three in five (62%) saying they use the same products either often (52%) or always (11%). Within this group, women show slightly higher loyalty than men, with 66% using products often or always, compared to 59% of men.

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%).



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%).

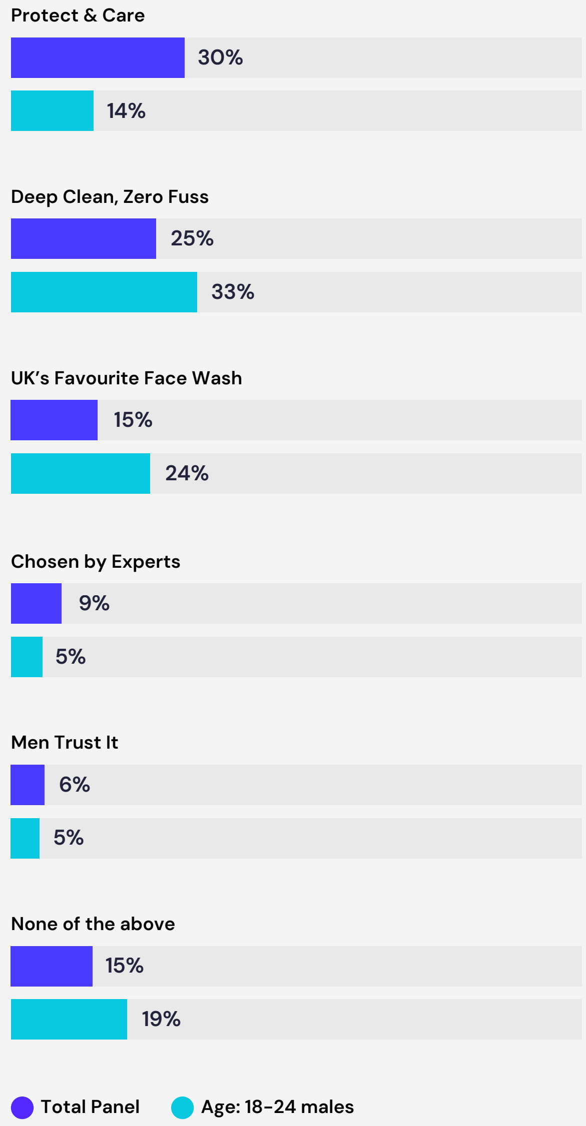
As men tend to value higher quality skincare products, we tested some on-pack messaging with a well-known face wash.

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%).

Which product would you buy?



“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%).

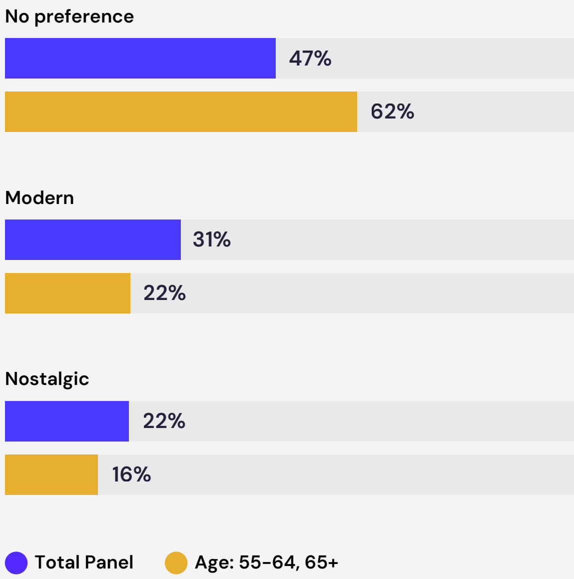
We ran some tests to see if consumers would feel more comfortable using nostalgic packaging, which would possibly feel more intuitive and familiar. This could help to alleviate some of the pinch points around hard-to-read packaging or accessibility of designs.

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.

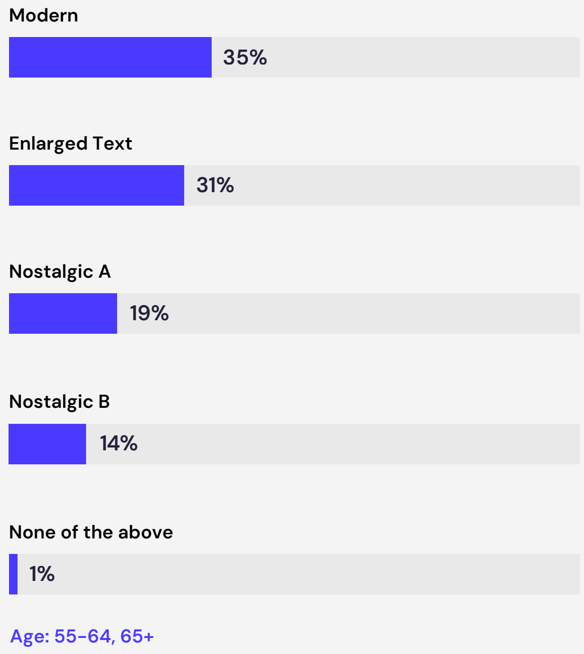
The different packaging options spanned several decades from the 1960s (when they were children) up to modern day.

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.

Which packaging design do you find most appealing?



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.

Partner with Vypr to Lead the Market

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