Purchase and Consumption of Non-dairy Alternative Products and Oat-Based Products

FSS Scotland

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Background to the Kantar purchase and usage panels

- Kantar are a market research company who collect longitudinal information on purchases into the home from a large Great Britain household consumer panel of around 30,000 households. A subset of around 11,000 individuals from these households also record the food and drink they eat at home or carry out (around 1,000 in Scotland). This subset of the main purchasing panel is called the usage panel.
- The panel is demographically and geographically representative of the GB population. The collected data is then weighted up to reflect the full population in Great Britain.
- For the purchase task, the main shopper in the household records every grocery item purchased and brought back into the home using a barcode scanner. Panellists also have a codebook for non-barcoded items and to record the store at which the trip was made.
- A subset of the panel also complete an average of 4 week-long diaries each year, recording all the foods and drinks they consume at home or carry out. This is recorded for all individuals in the household, including children.
- The usage panel collects information on how often foods and drinks are consumed, alongside information such as when, where and why foods were consumed. Panellists are not asked to weigh their food and therefore the data does not provide quantities of food and drink consumed.
- The usage panel does not include any food or drink purchased and consumed outside of the home (OOH), for example from restaurants, cafes, or ‘on the go’. This information is collected by another subset of the main purchasing panel, with 7,500 individuals in GB recording their OOH purchases. Of this, 3,500 also record their OOH consumption.

Non-dairy and meat-free choices becoming “easier” for consumers

More categories

New needs
(beyond heatlh)

Levers For Growth

More presence

More moments

TRY VEGAN THIS JANUARY
veganuary.com

More targets

We’ve all played a part in the plant revolution…

It’s not about vegetarians & vegans

86%

of plant based meals are eaten by non-vegans

89%

of meat/fish free meals are eaten by non- vegetarians

Kantar Worldpanel / Total Foods / 52 w/e February 2019

Glossary

YOY = Year-on-Year

HH = Household

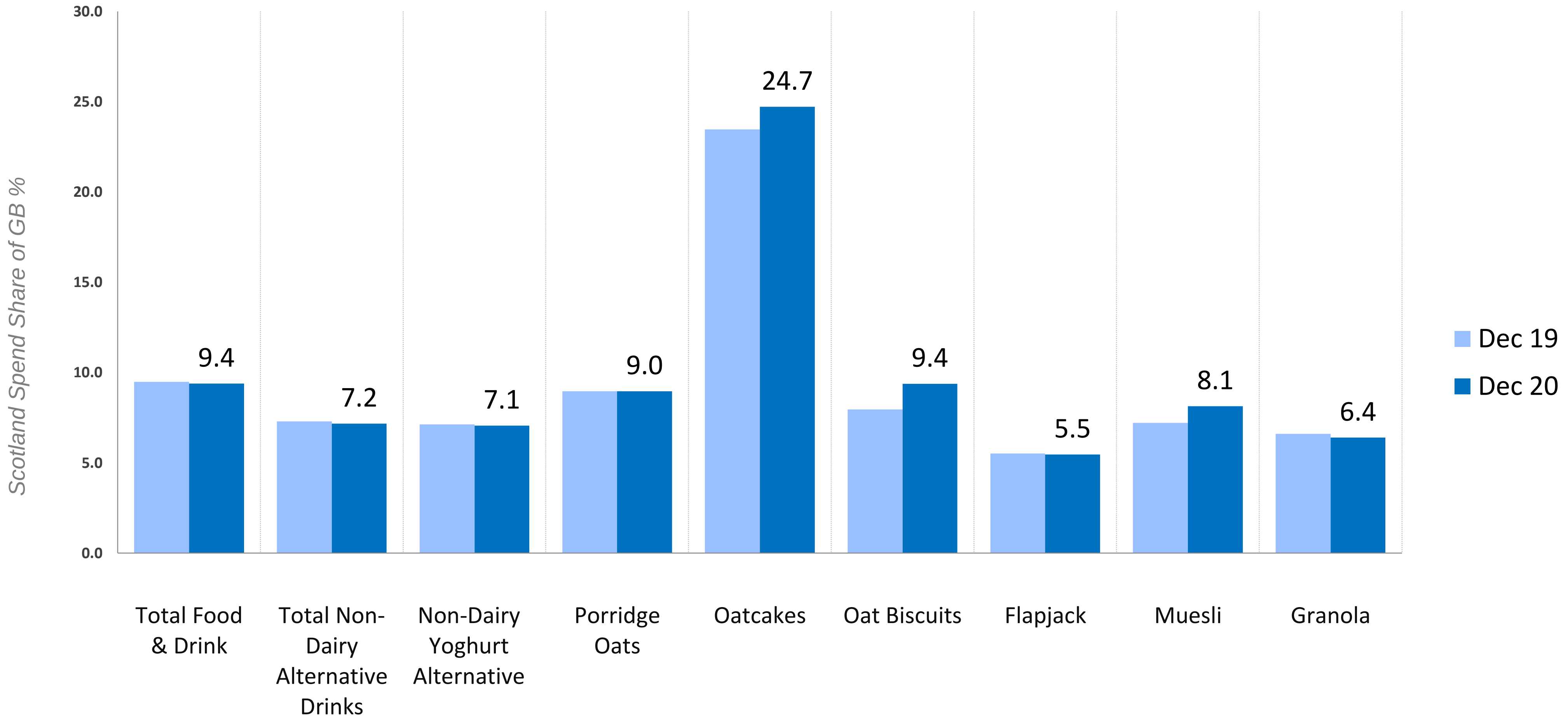
Over-index = X has a higher share than the wider market / benchmark, where X could be the Scottish region, a demographic group, a retailer, a brand, a category etc.

Penetration = Proportion of the population of GB or Scotland respectively who have purchased the category within the time period reported. Reported in %.

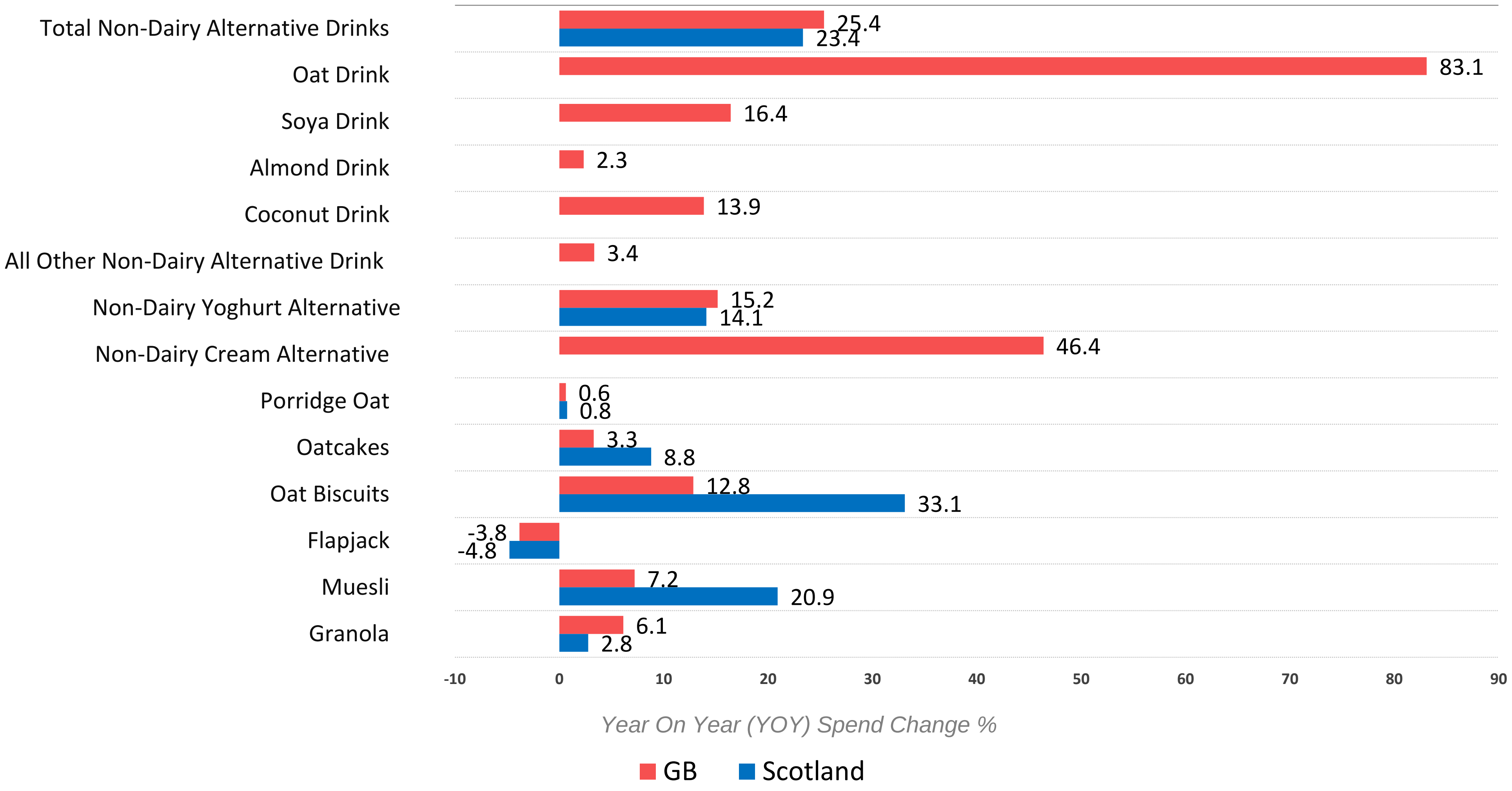
Purchase: Based on take-home purchasing from 30,000 households, weighted up to GB/Scotland.

Consumption servings: reported in millions. Based on consumption from 11,000 individuals, weighted up to GB/Scotland.

Scotland accounts for nearly a quarter of all GB Oatcakes sales – the only category that Scotland over-indexes in vs Food & Drink average.



Most markets have seen significant growth over the latest year, which reflects trends across grocery. Scotland outperforms GB in Oatcakes, Oat Biscuits and Muesli.



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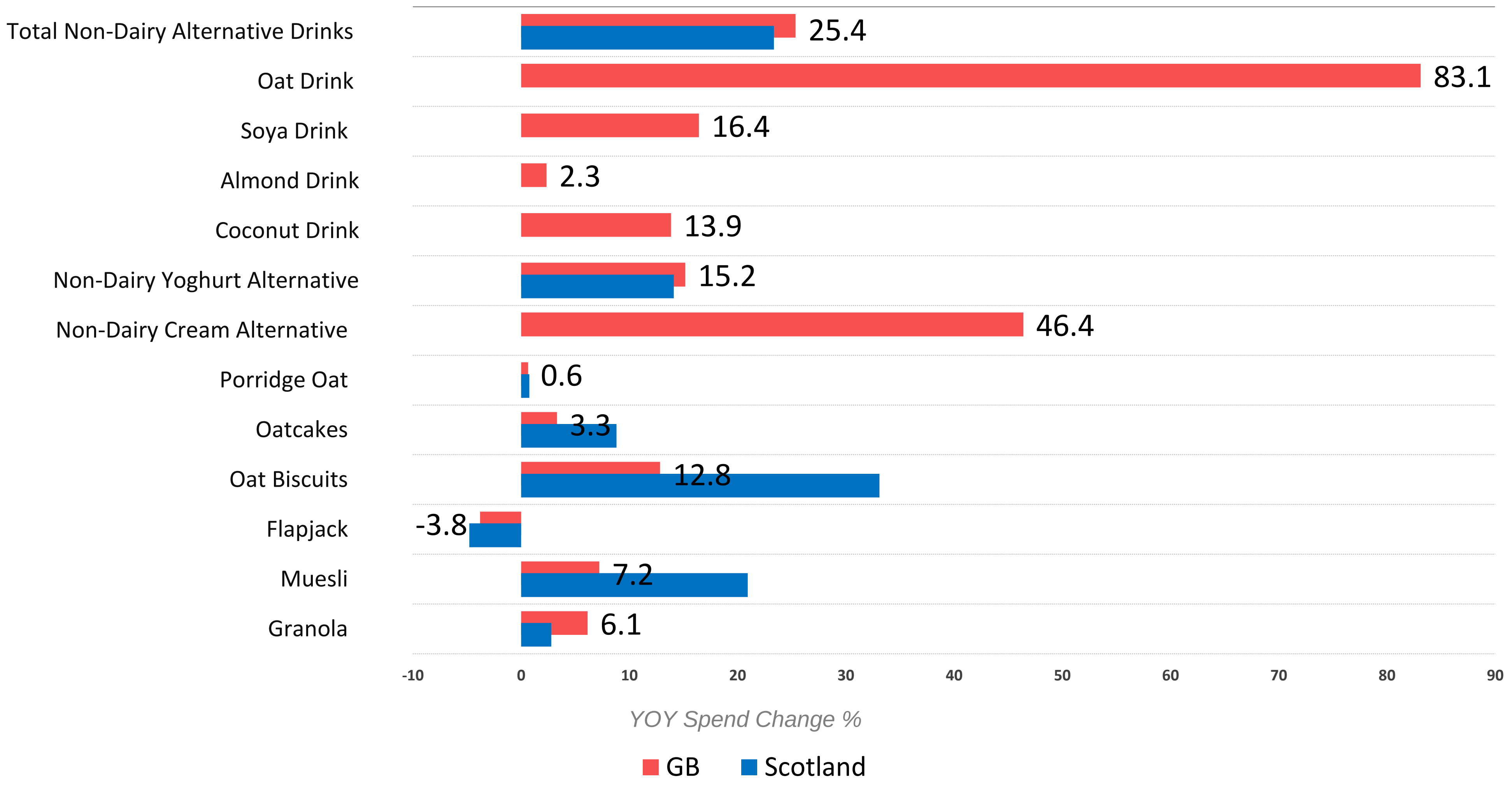
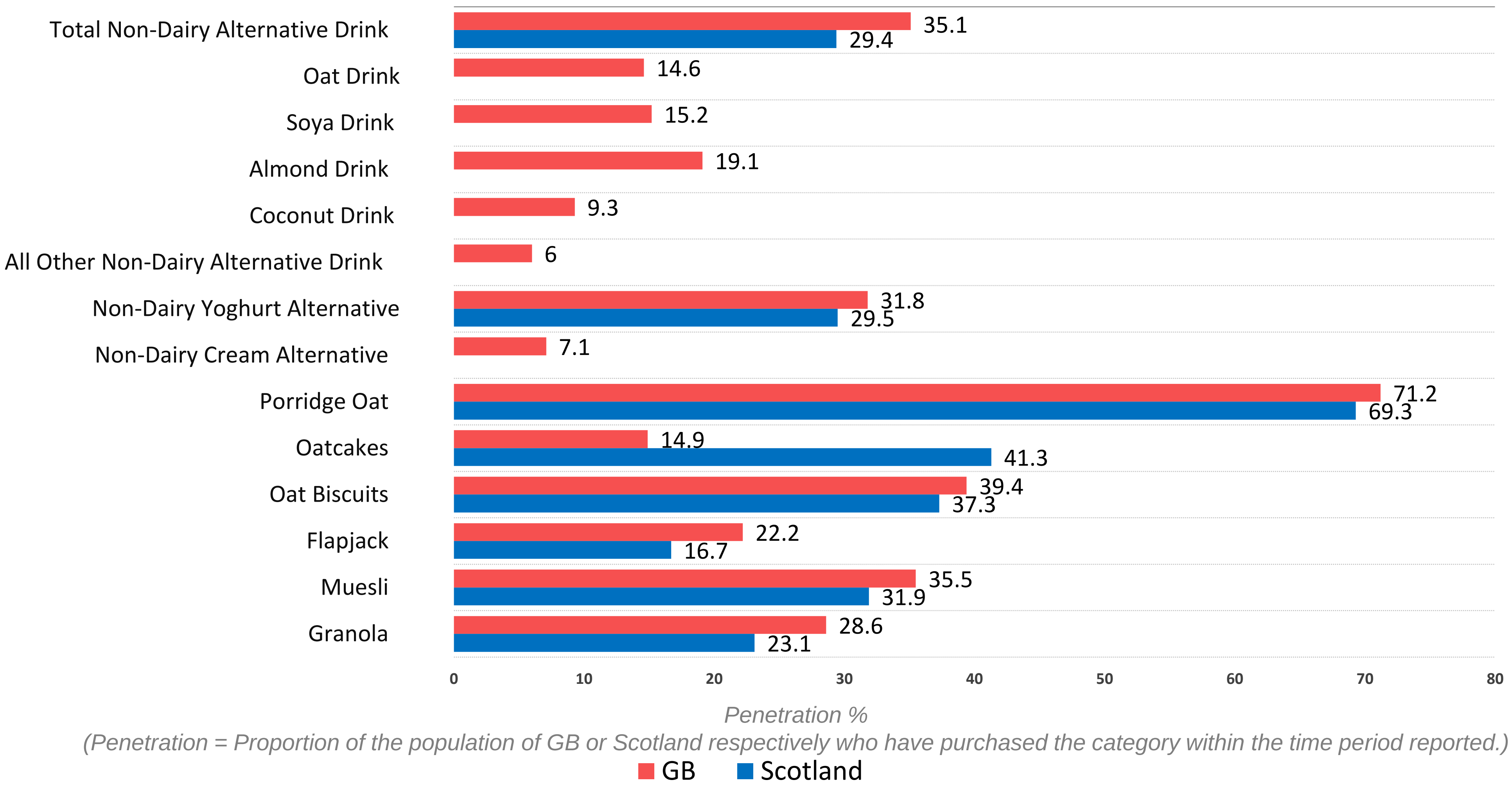
Oat Drink, the largest sector within Non-Dairy Alternative Drinks in value terms, is the main driver of the category's growth. Although, all sectors do see positive year on year change.



Oatcakes is the only category where the penetration is higher in Scotland than the average across GB.



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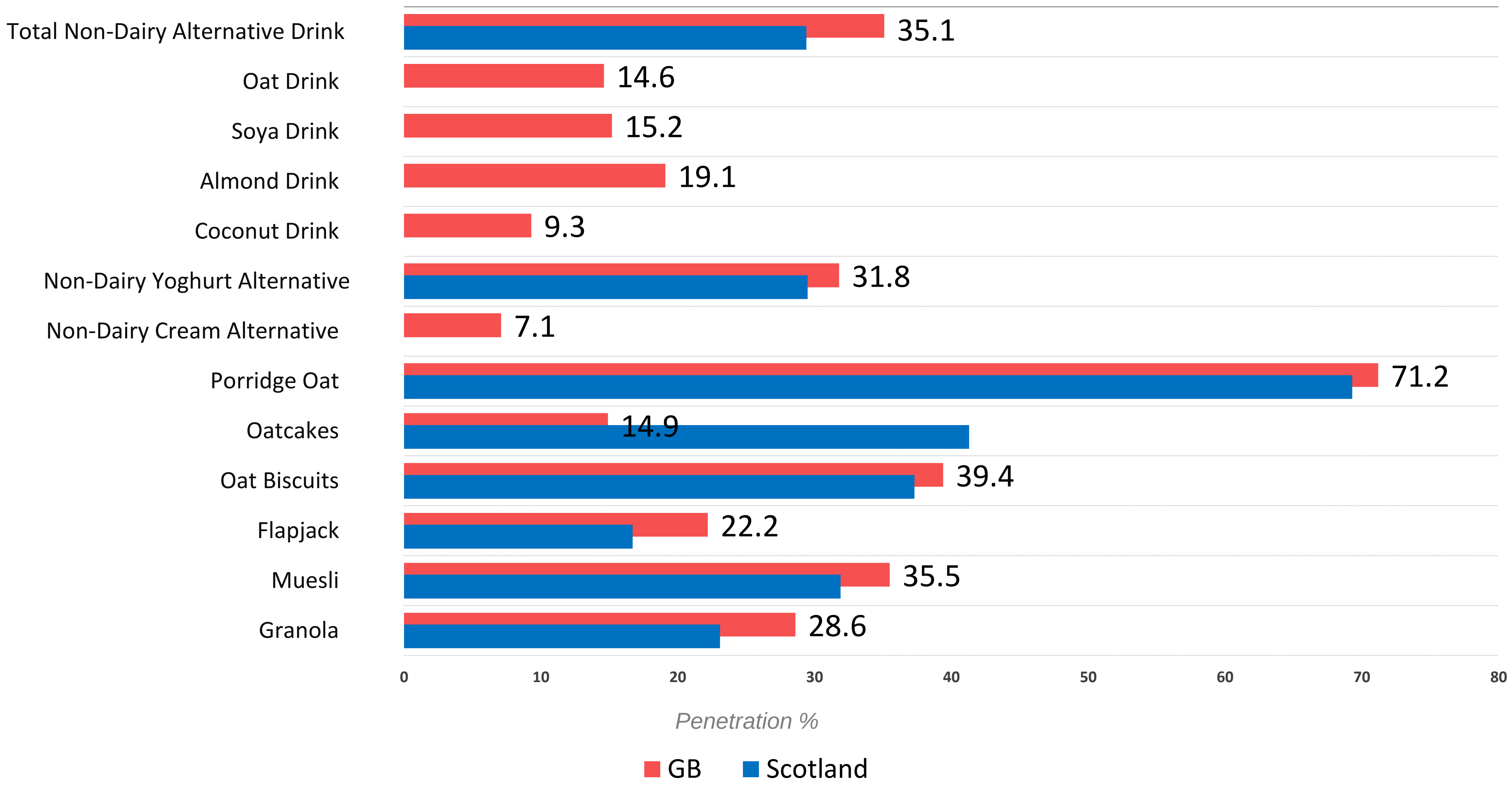
Despite Oat and Soya Drinks being the larger sectors, a higher proportion of the population purchase Almond Drinks.



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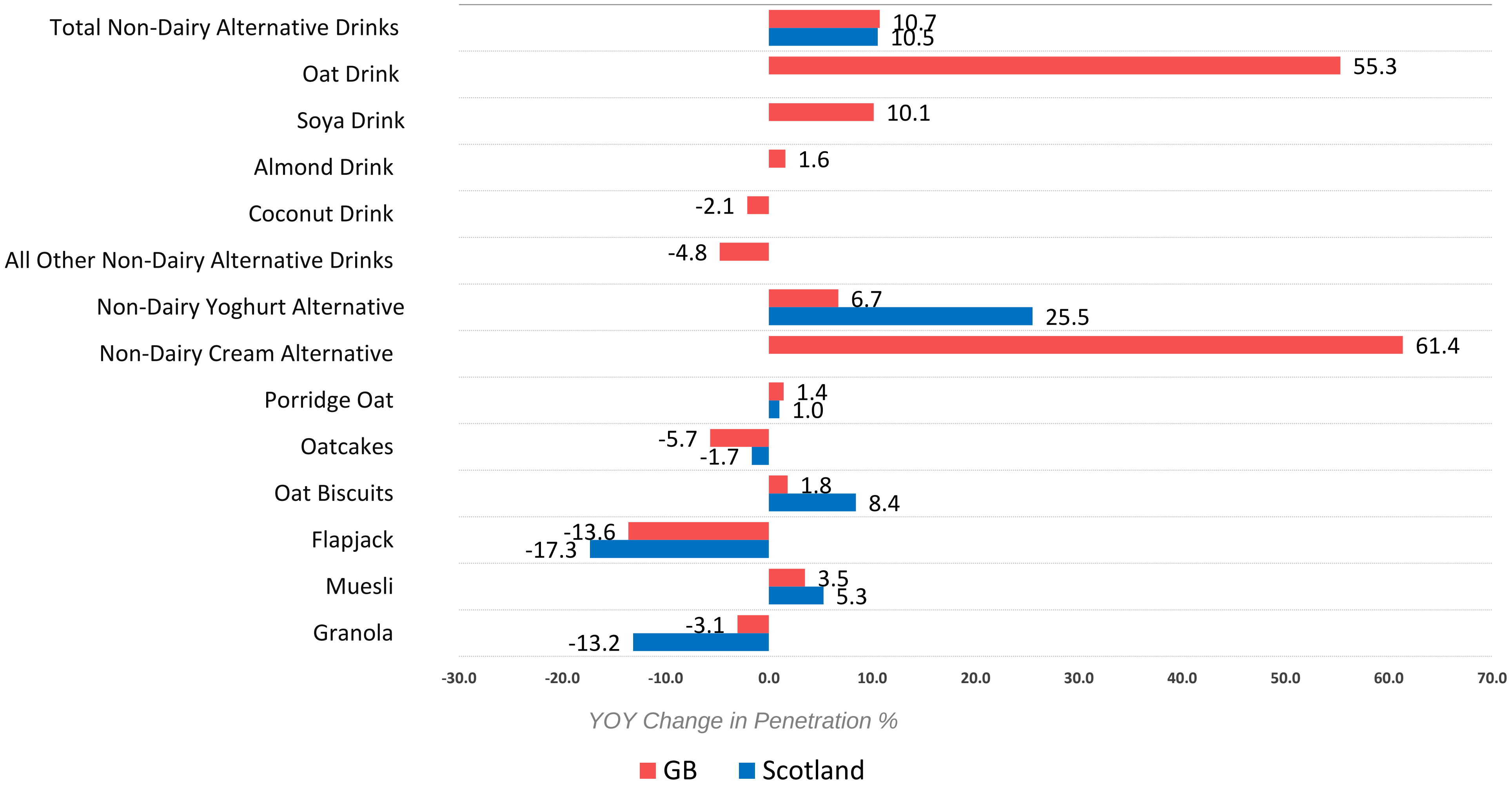
Non-Dairy Yoghurt Alternative in Scotland has seen the highest increase in engagement, whereas Flapjack, Granola and Oatcakes have all see drops in penetration.



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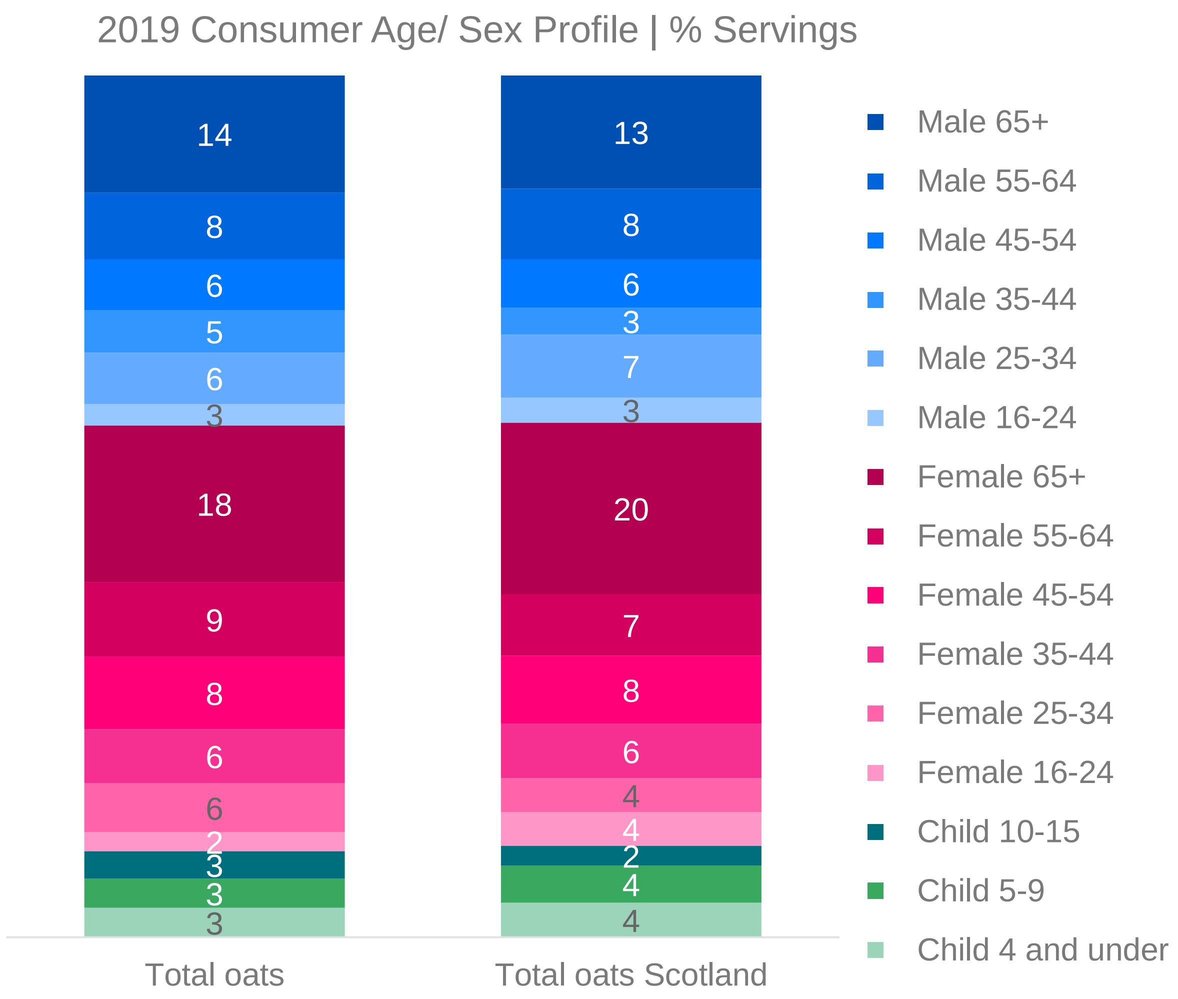
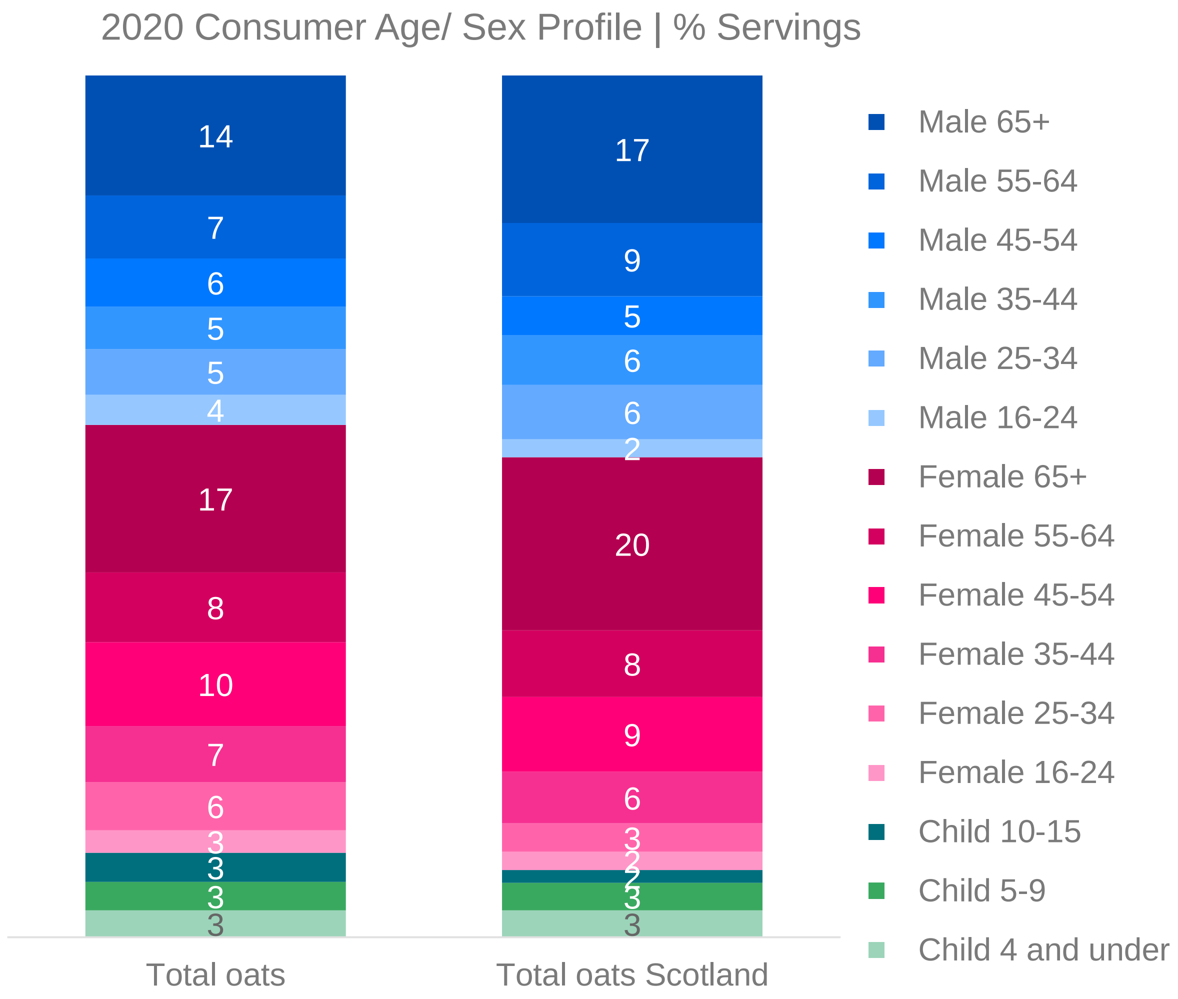
Oats generally attract an older consumer with the over 65s accounting for 37% of consumption

(150 ix vs Total Food & Drink)

Oats consumption in Scotland is even more reliant on the over 65s, with males 65+ making significant gains YoY (%)





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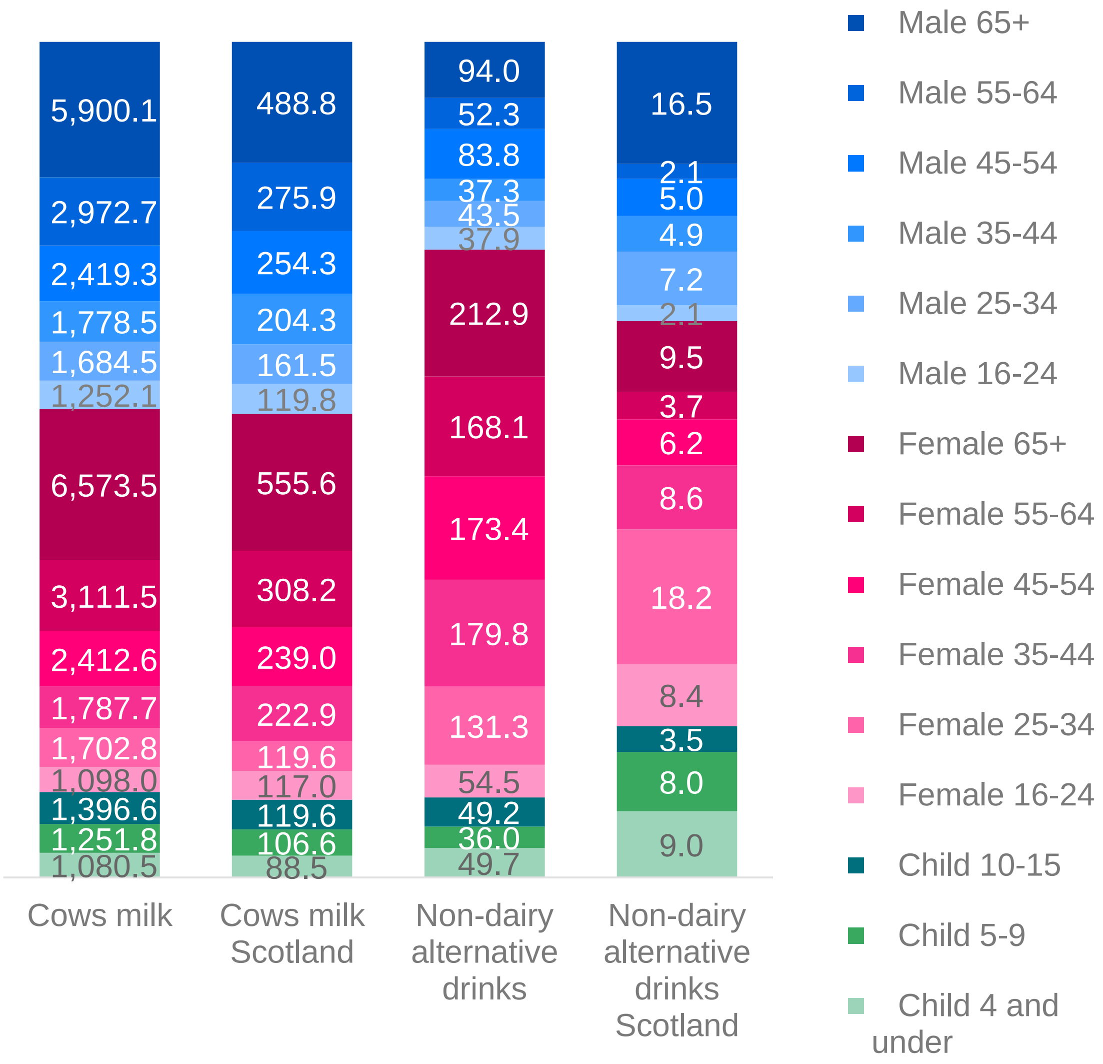
Oats in Scotland are now less likely to be consumed by children compared to a year ago

-2.8ppts

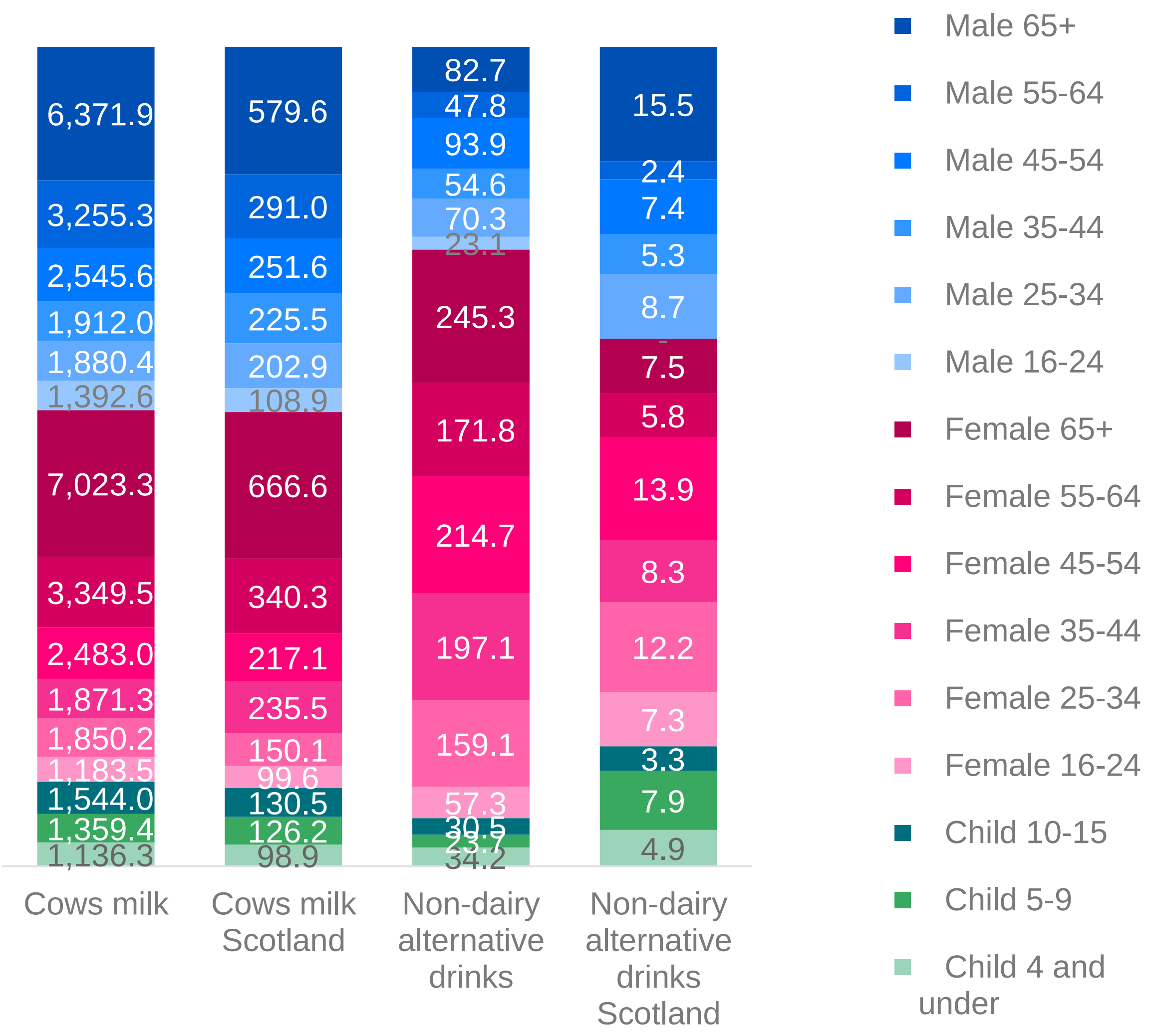
Kantar Usage | In home and carried out | GB and Scotland | 52 w/e 27 Dec 2020 vs LY

Cow's Milk vs Non-Dairy Alternative Drinks Consumption by Demographics – Serving Numbers Scotland vs GB

2019 Consumer Age/ Sex Profile | Servings (Million)



2020 Consumer Age/ Sex Profile | Servings (Million)



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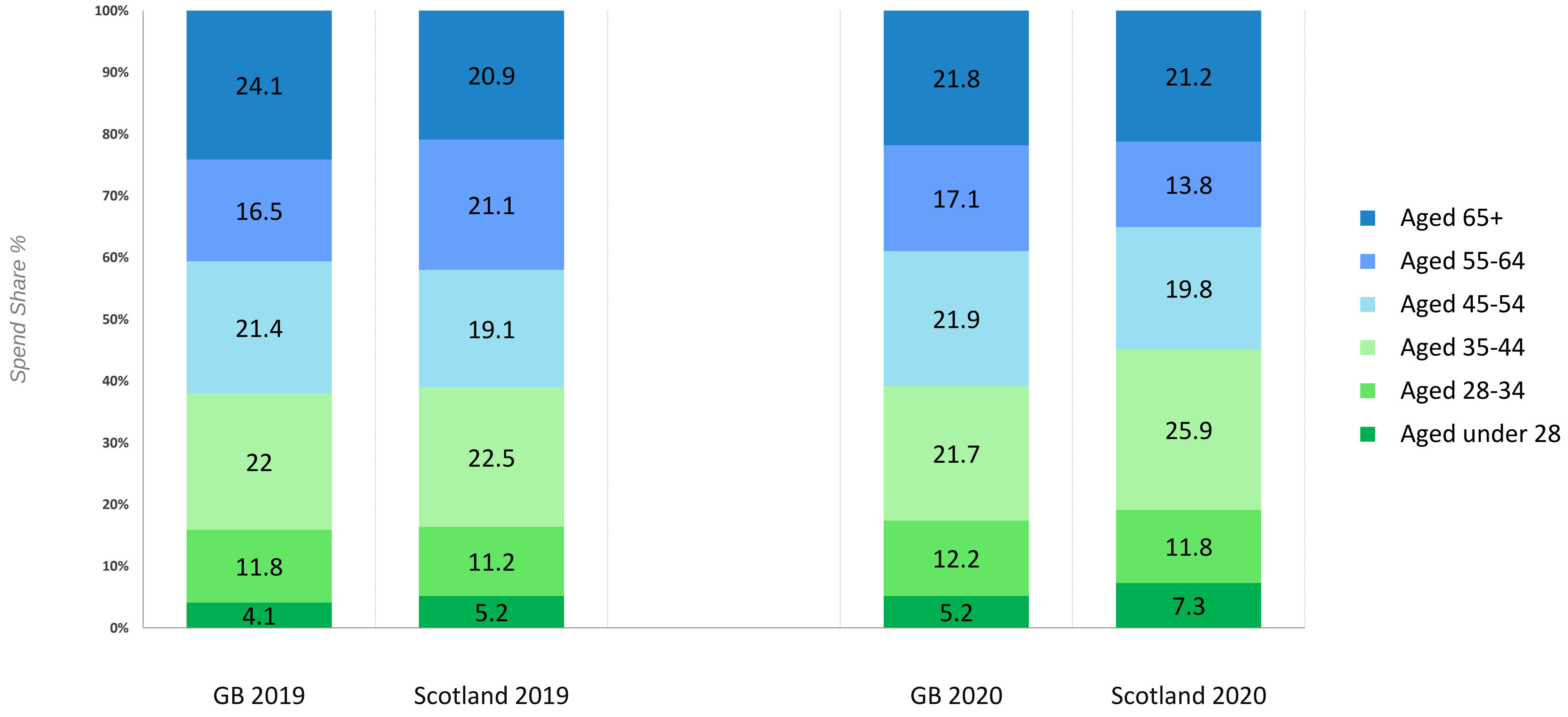
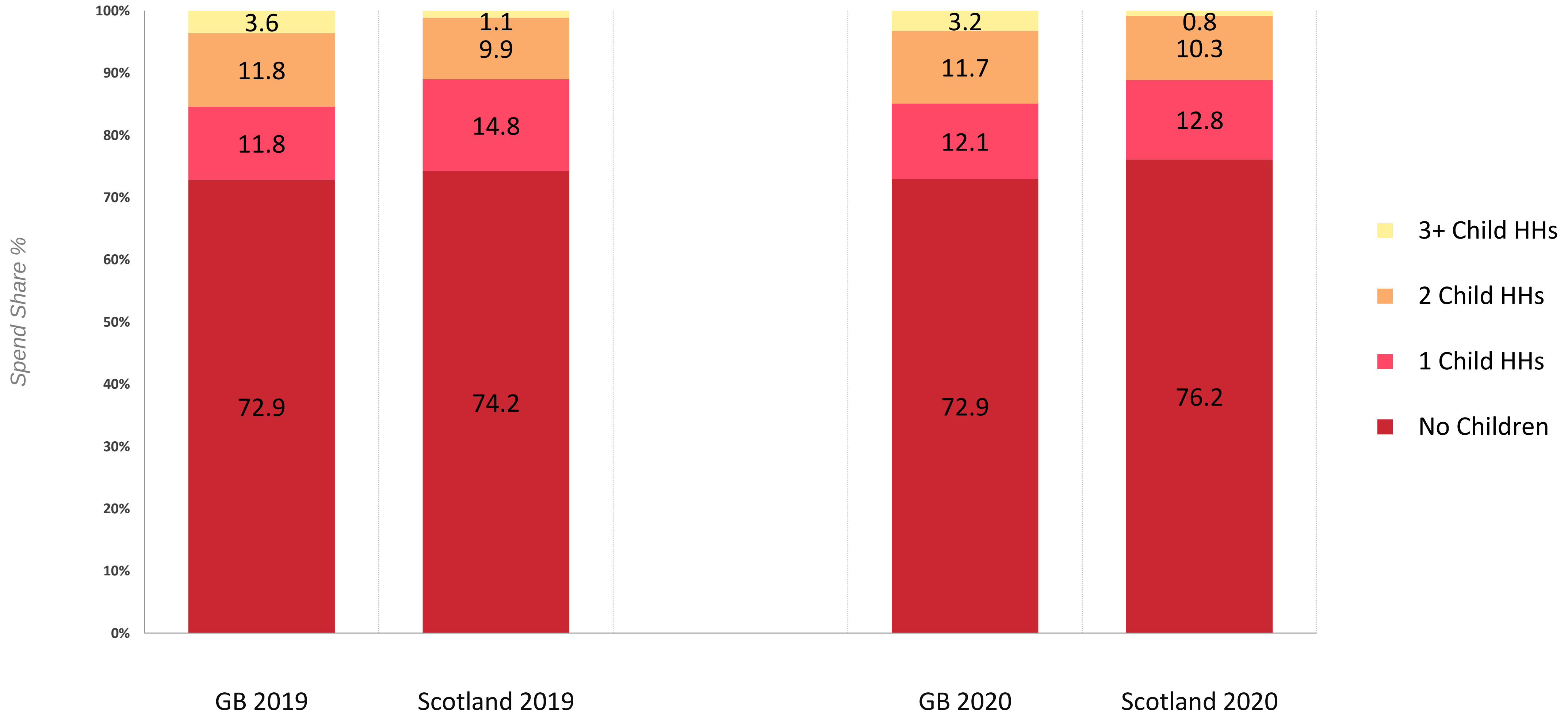
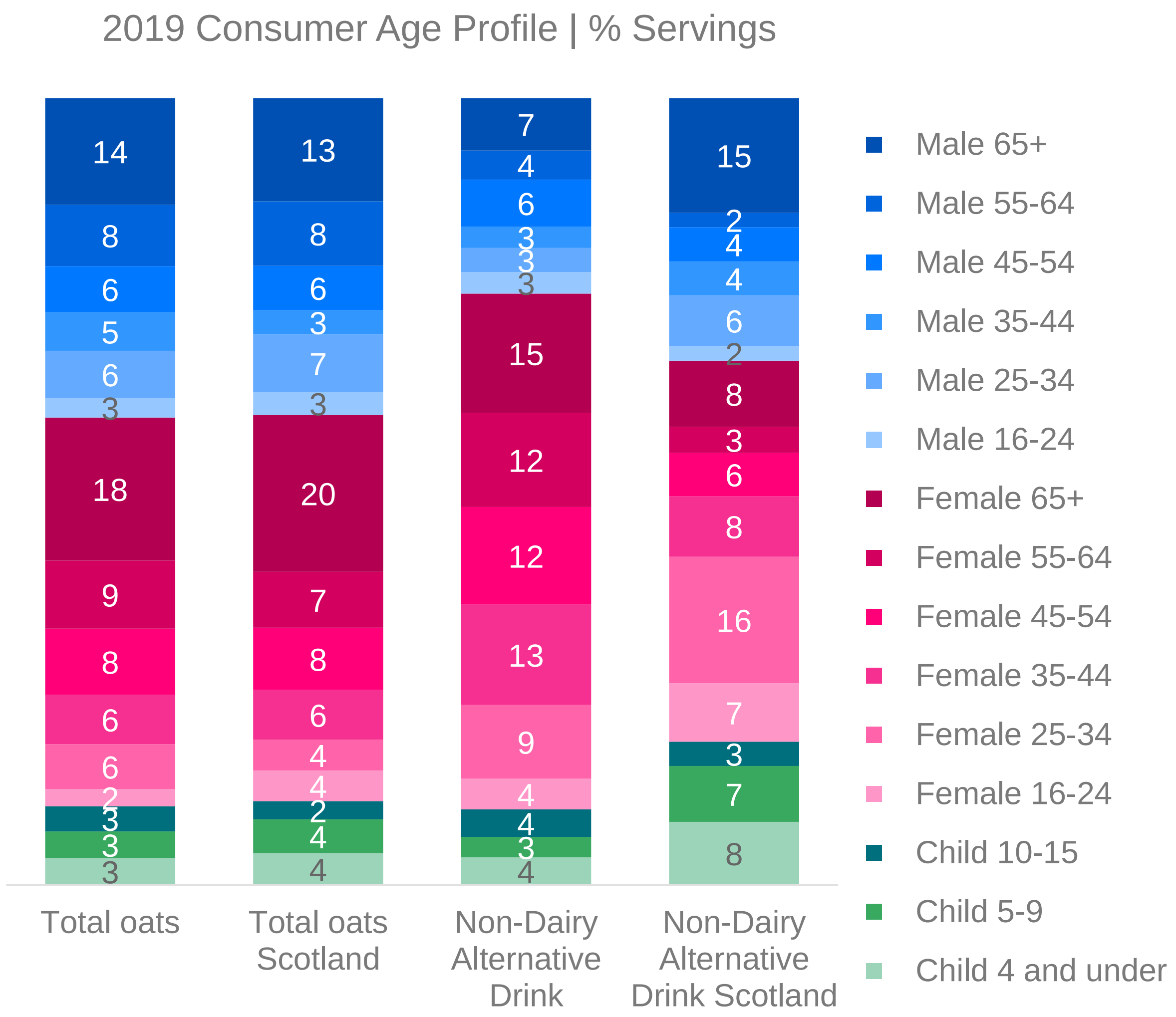
Non-dairy alternative drinks in Scotland over-index in the under 28 and 35-44 age groups vs GB. Both groups account for a higher share of spend than in 2019.

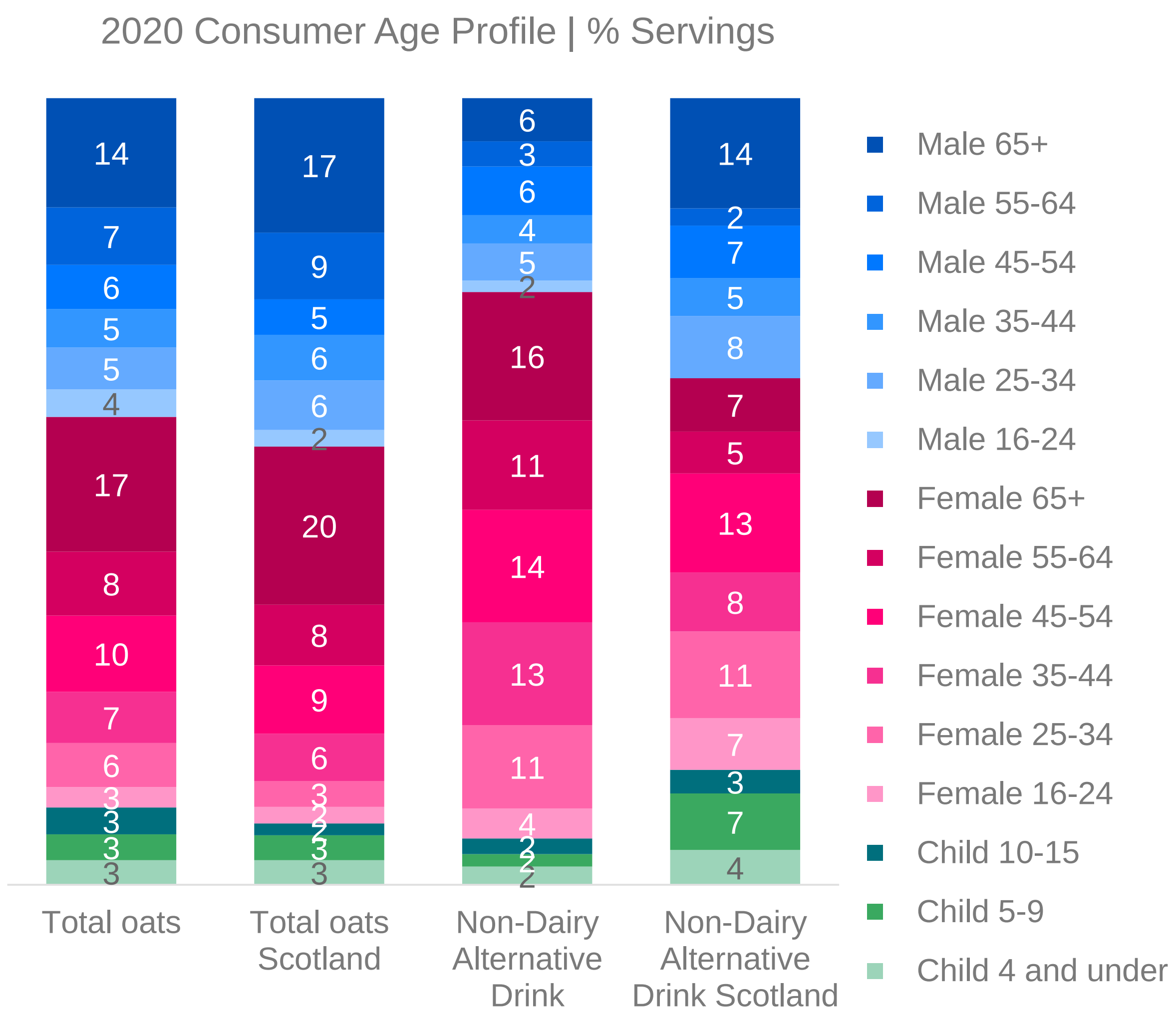


The majority of households purchasing Non-Dairy Alternative Drinks do not have children, with this being even more the case in Scotland vs GB.



Children command a significantly higher share of Non-Dairy Alternative Drinks consumption in Scotland. Non-dairy alternative drinks attract a female consumer, in Scotland this bias is less apparent





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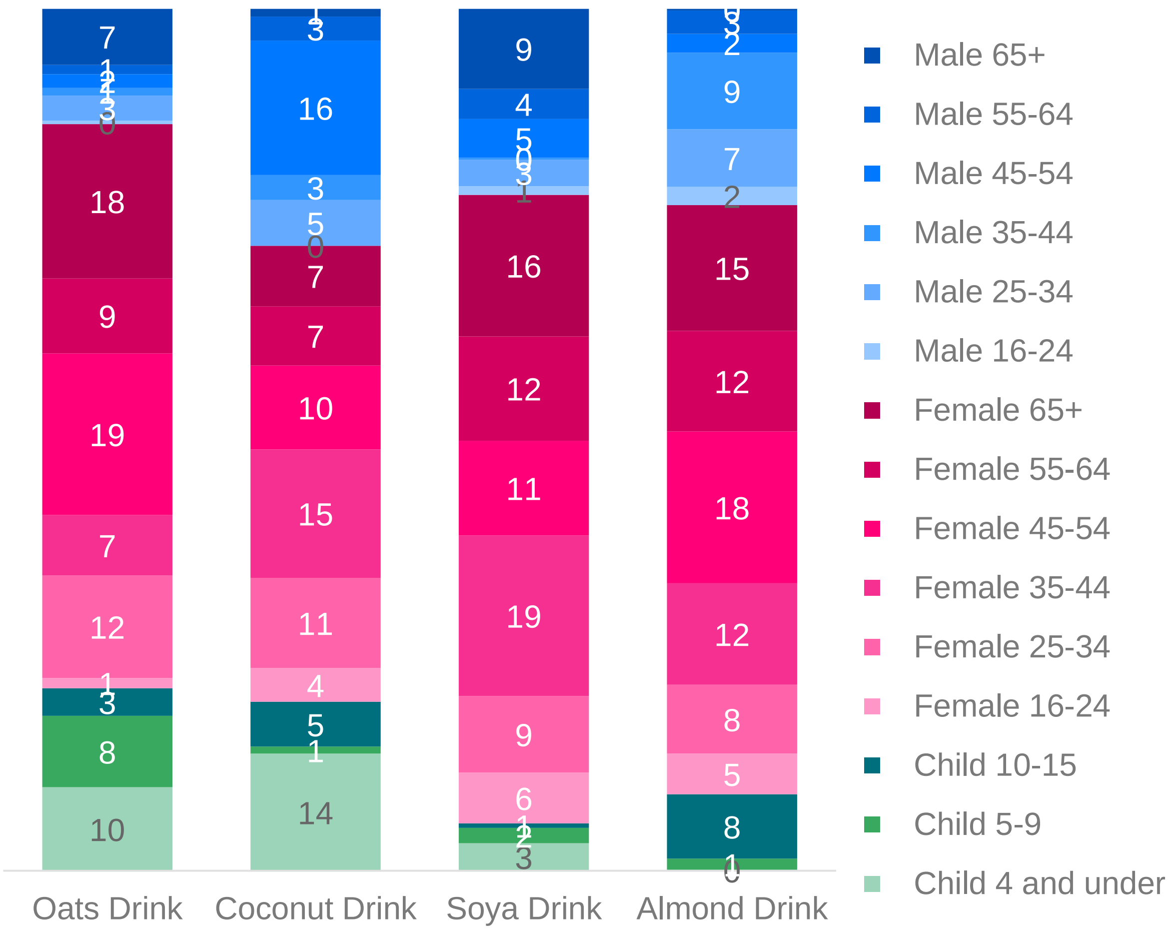
In 2019, children accounted for 18.2% of Non-Dairy Alternative Drinks consumption in Scotland. In 2020 this reduced to 15.6%

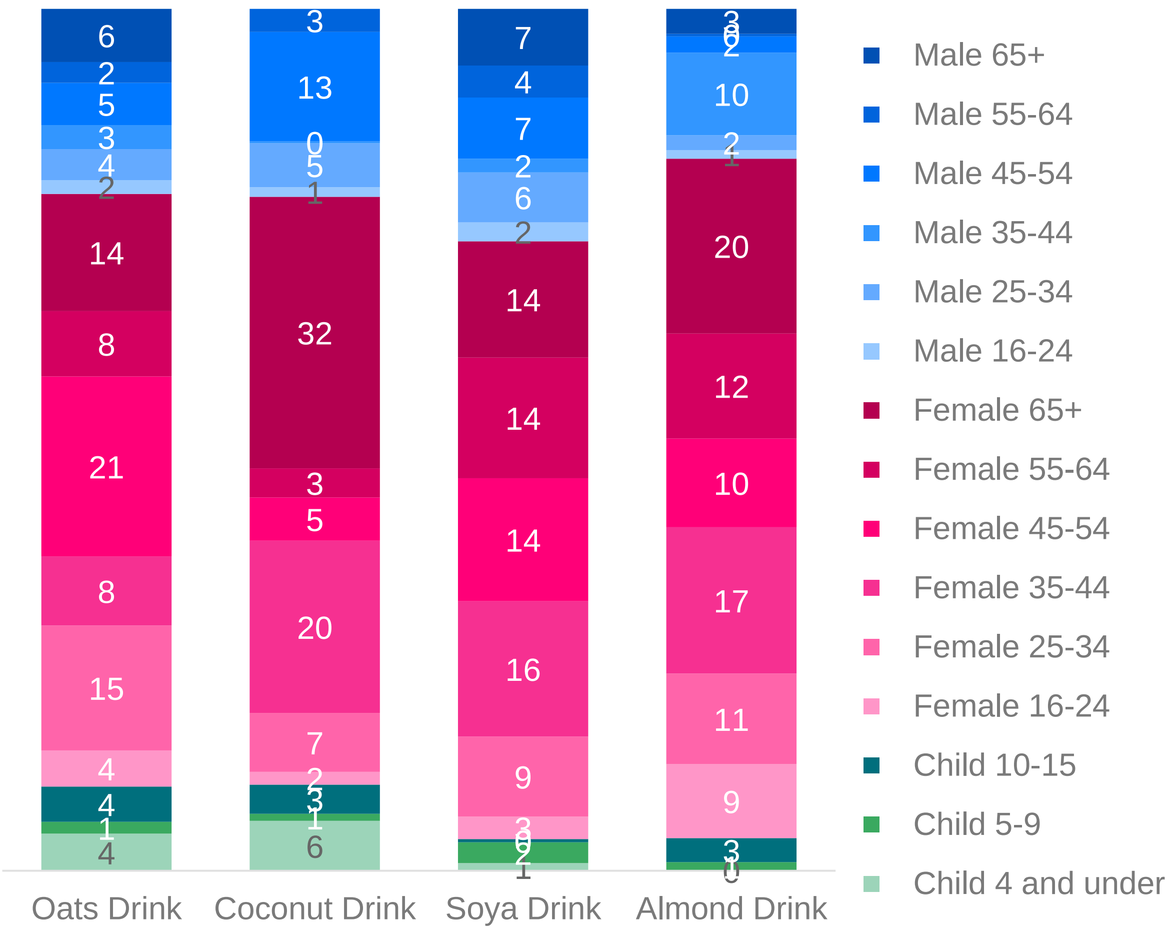
Kantar Usage | In home and carried out | GB and Scotland | 52 w/e 27 Dec 2020 vs LY

Total GB level - children becoming less important across the different non-dairy alternative drink types – likely to be an impact of adults being at home more than children during Covid. Oat Drinks are among the most popular for children

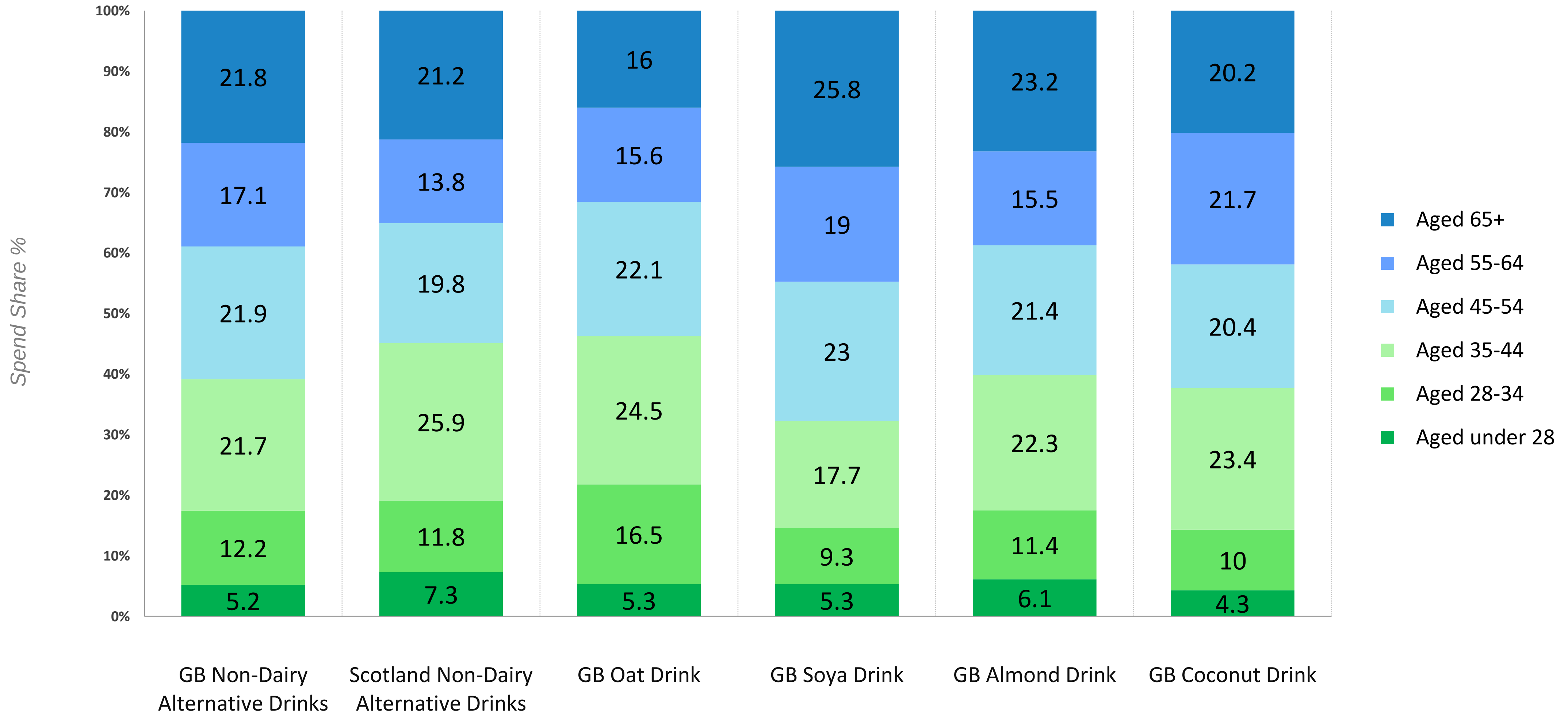
2019 Consumer Age Profile | % Servings



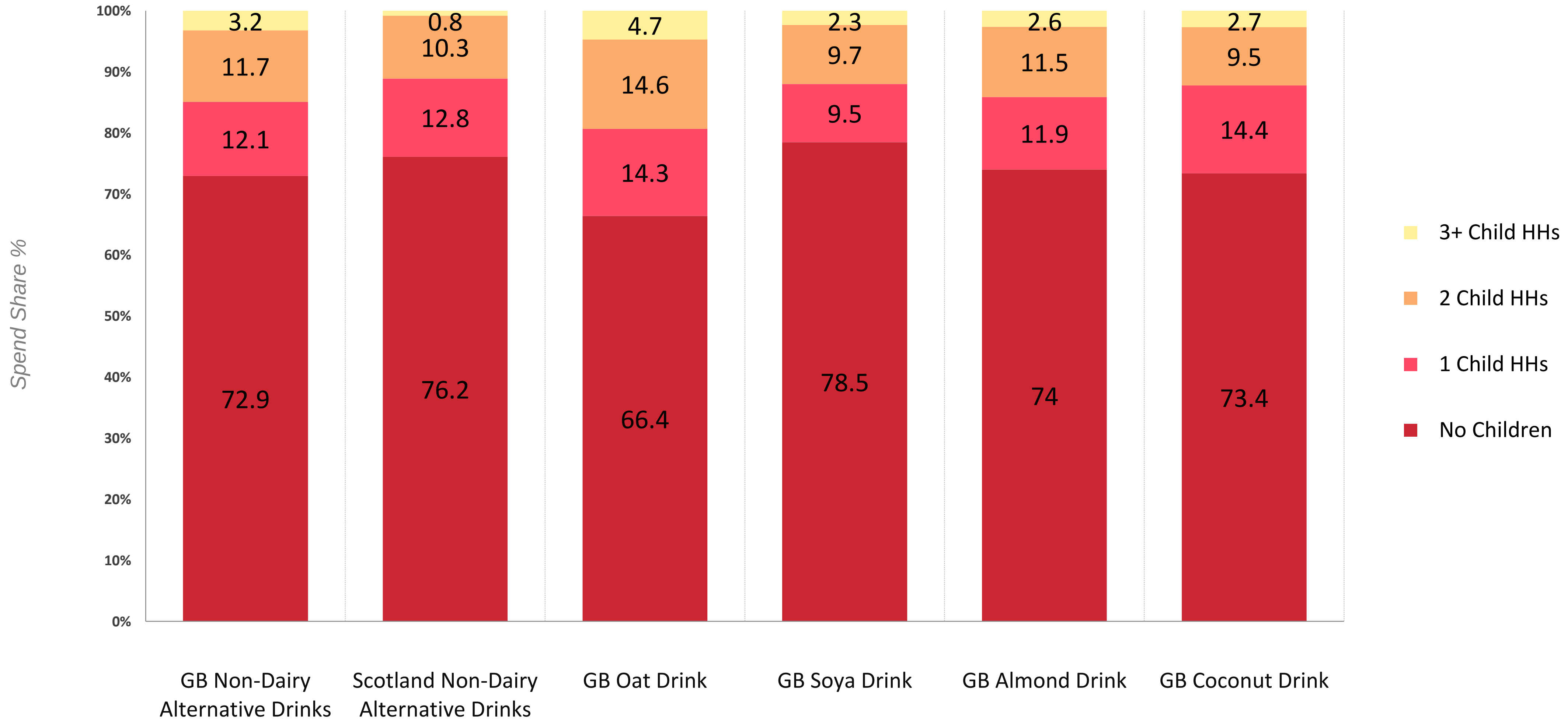
2020 Consumer Age Profile | % Servings



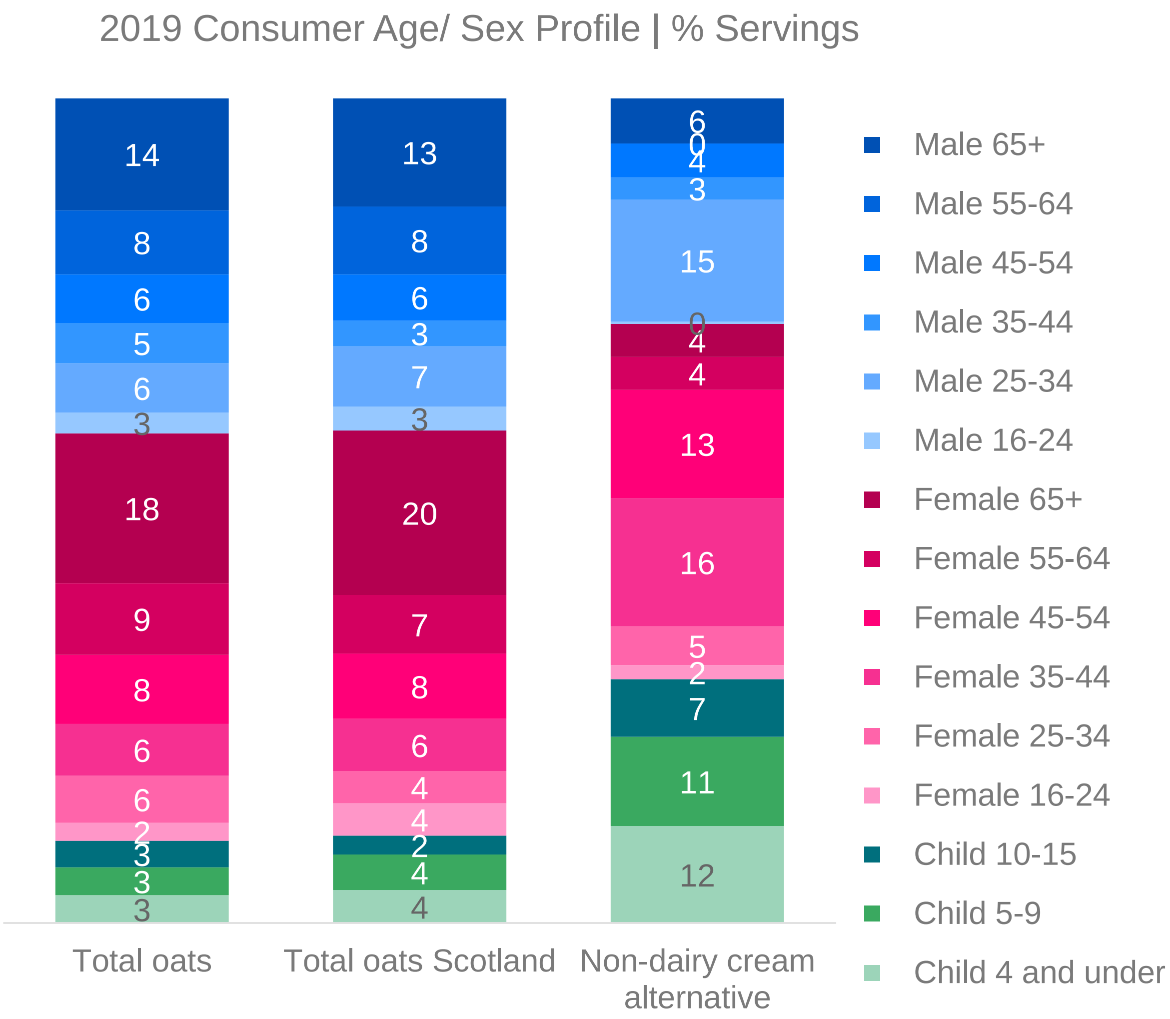
Of all the Non-Dairy Alternative drink sectors, Oat Drink engages the youngest demographic.

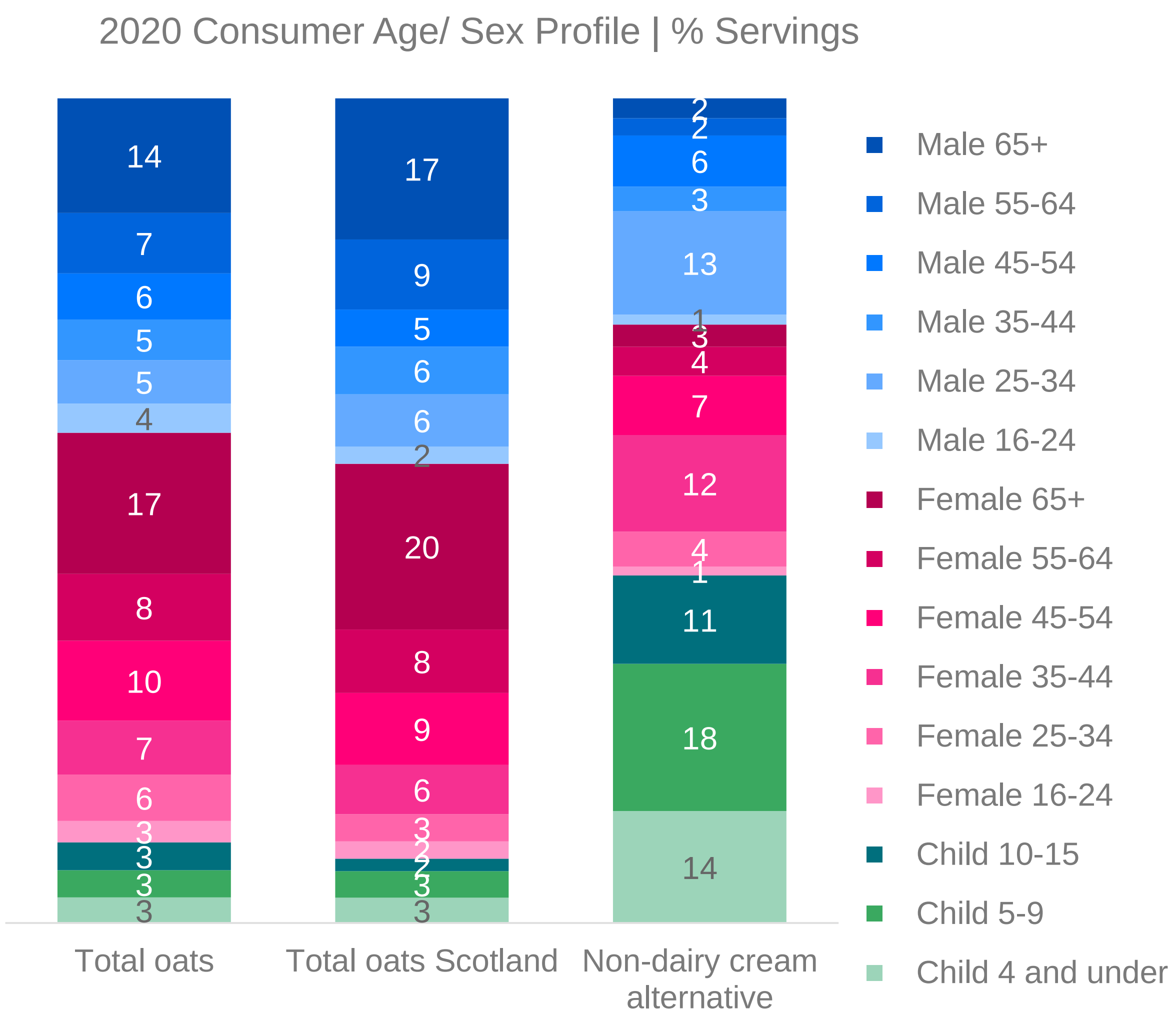


In addition, GB Oat Drink over-indexes in engaging households with children, when compared to the GB Non-Dairy Alternative Drink average.



Total GB level- Non-Dairy Cream Alternative has seen significant gains with children YoY (+12.5ppts)





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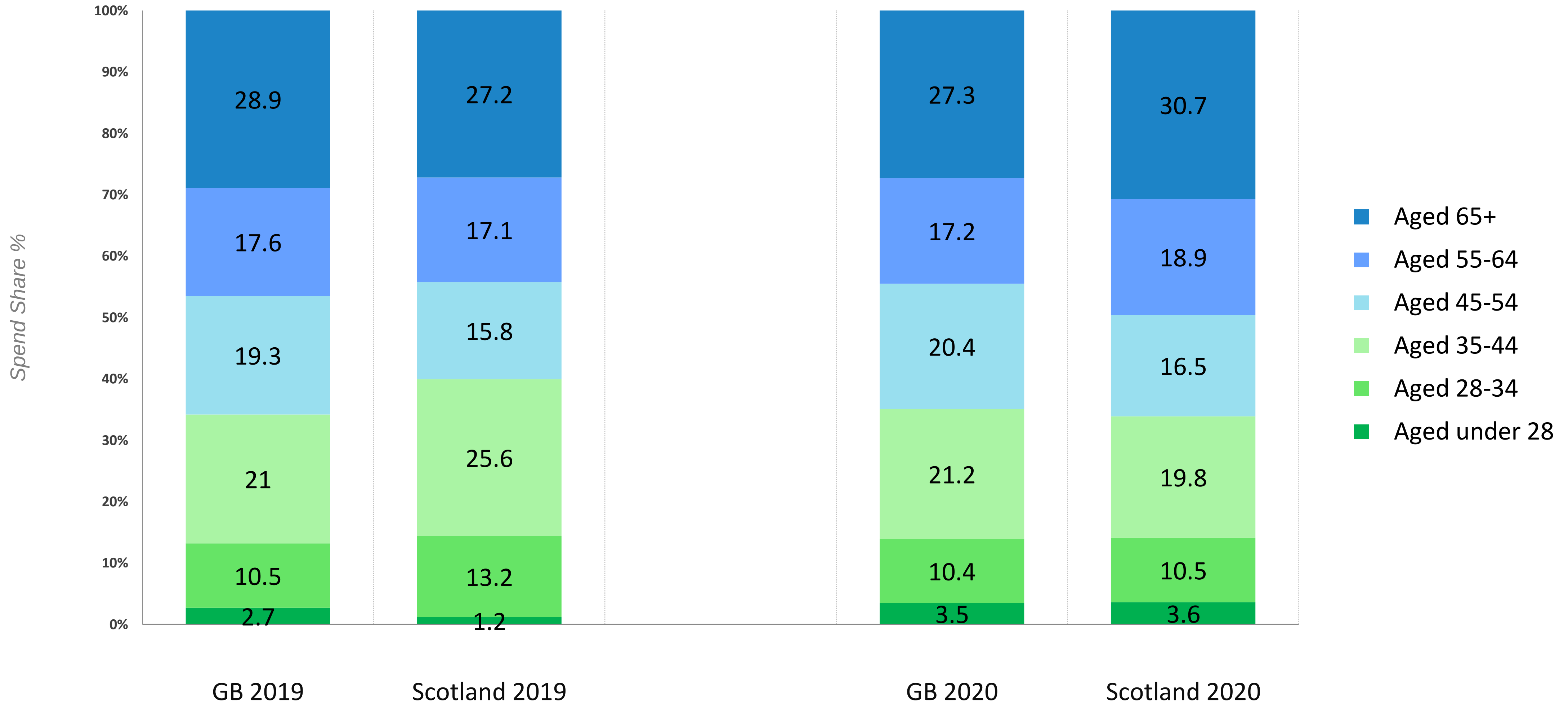
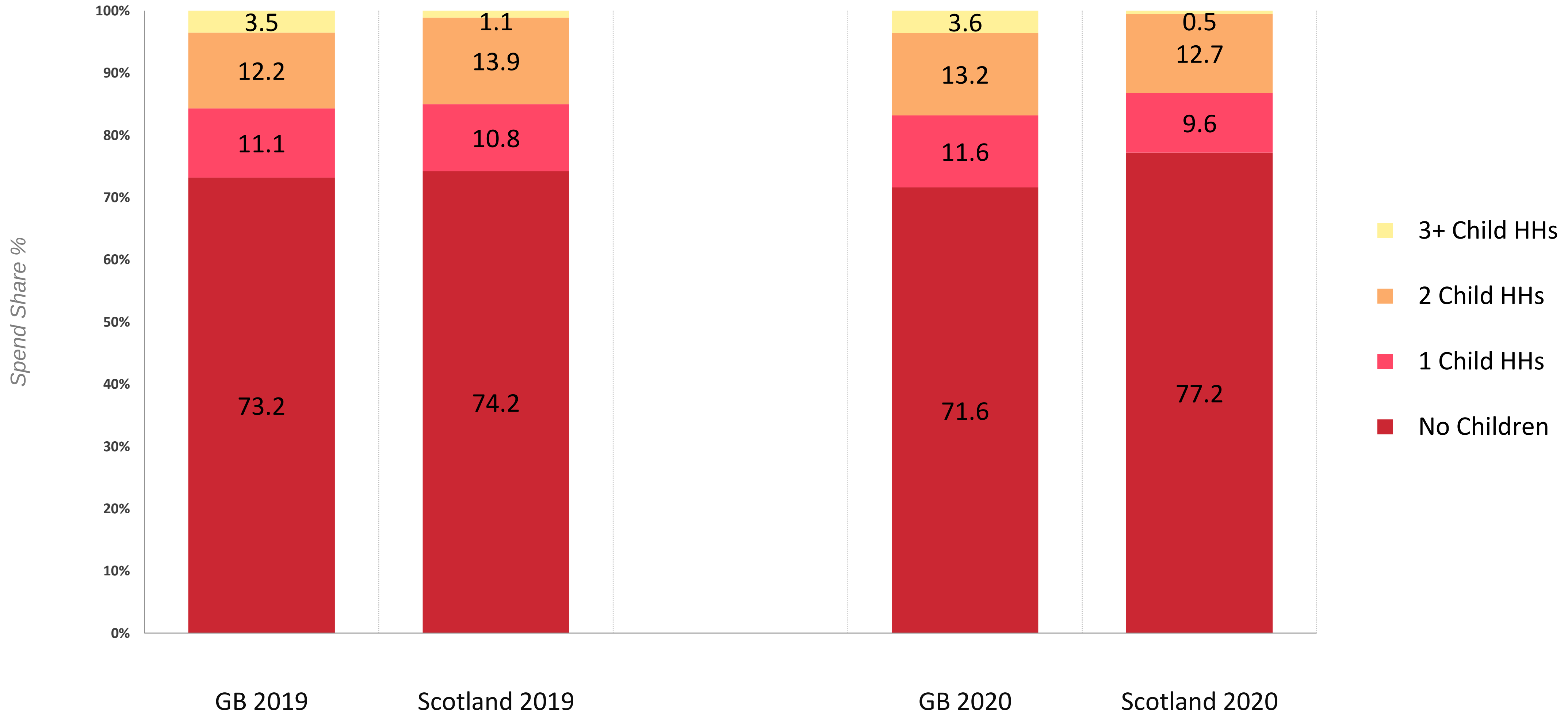
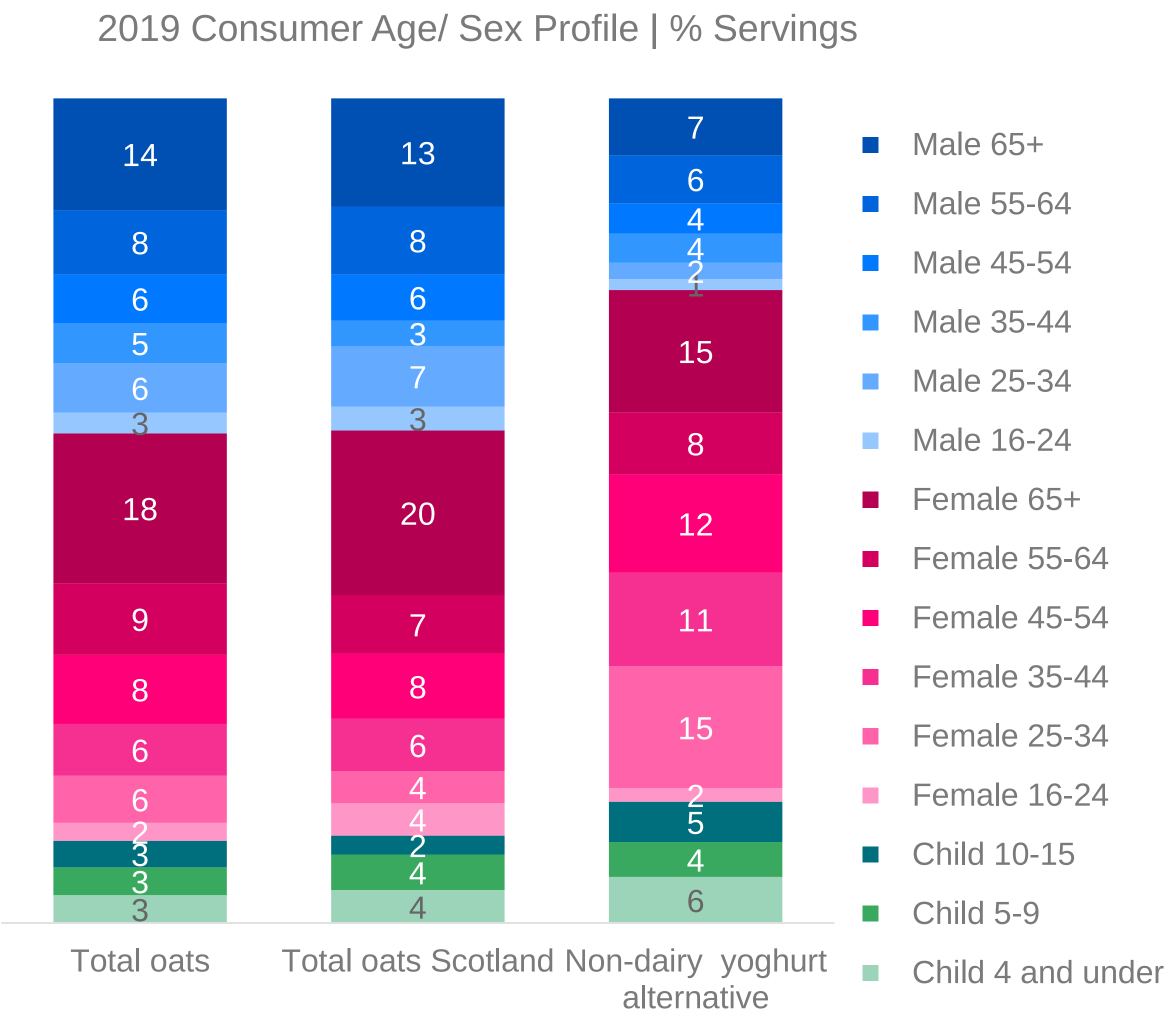
Non-Dairy Yoghurt Alternatives in Scotland engaged more households aged over 55 than in GB in 2020 – the opposite was true in 2019.

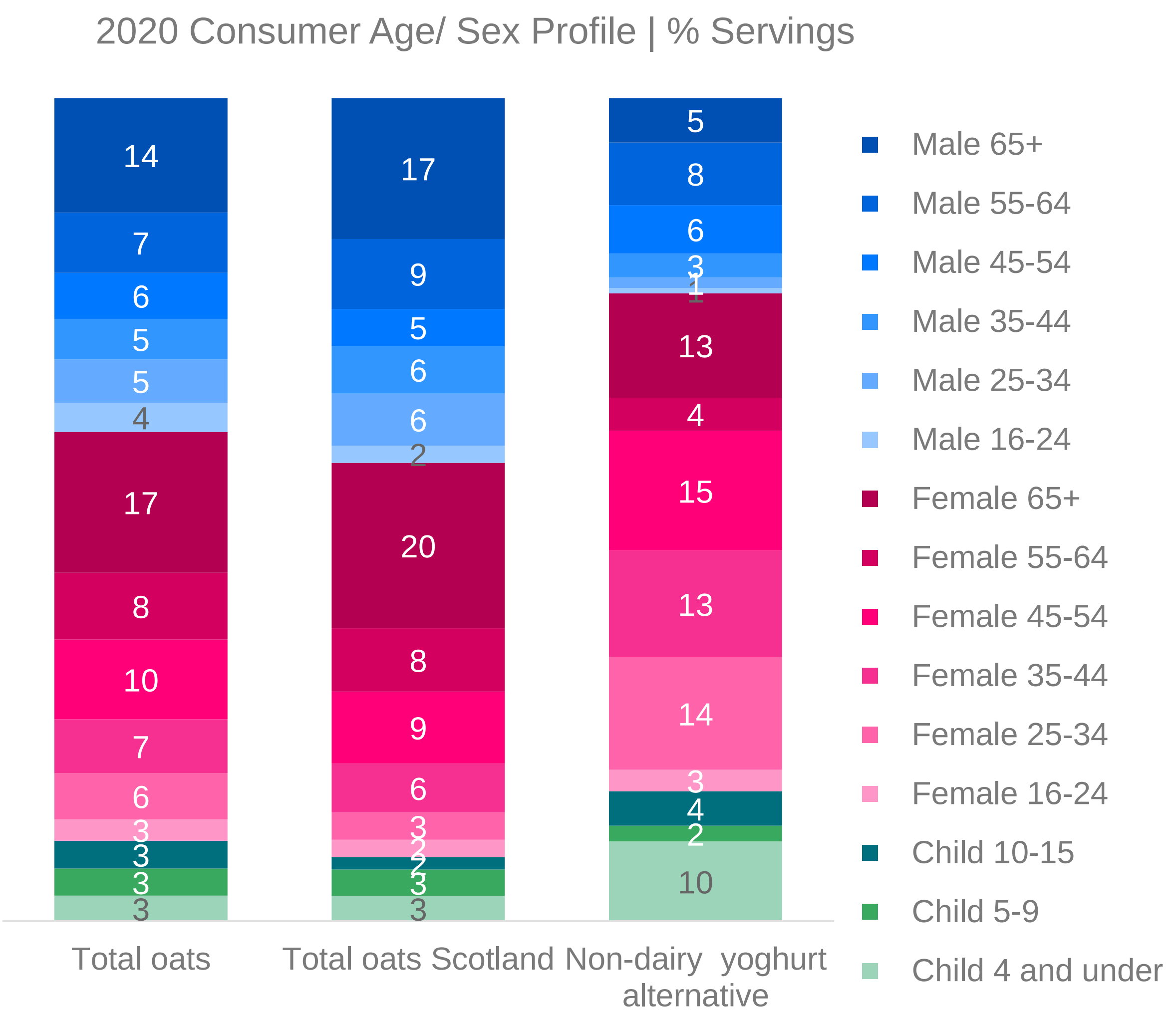


A higher proportion of Non-Dairy Yoghurt Alternative sales come from childless HHs in Scotland vs GB and vs 2019.

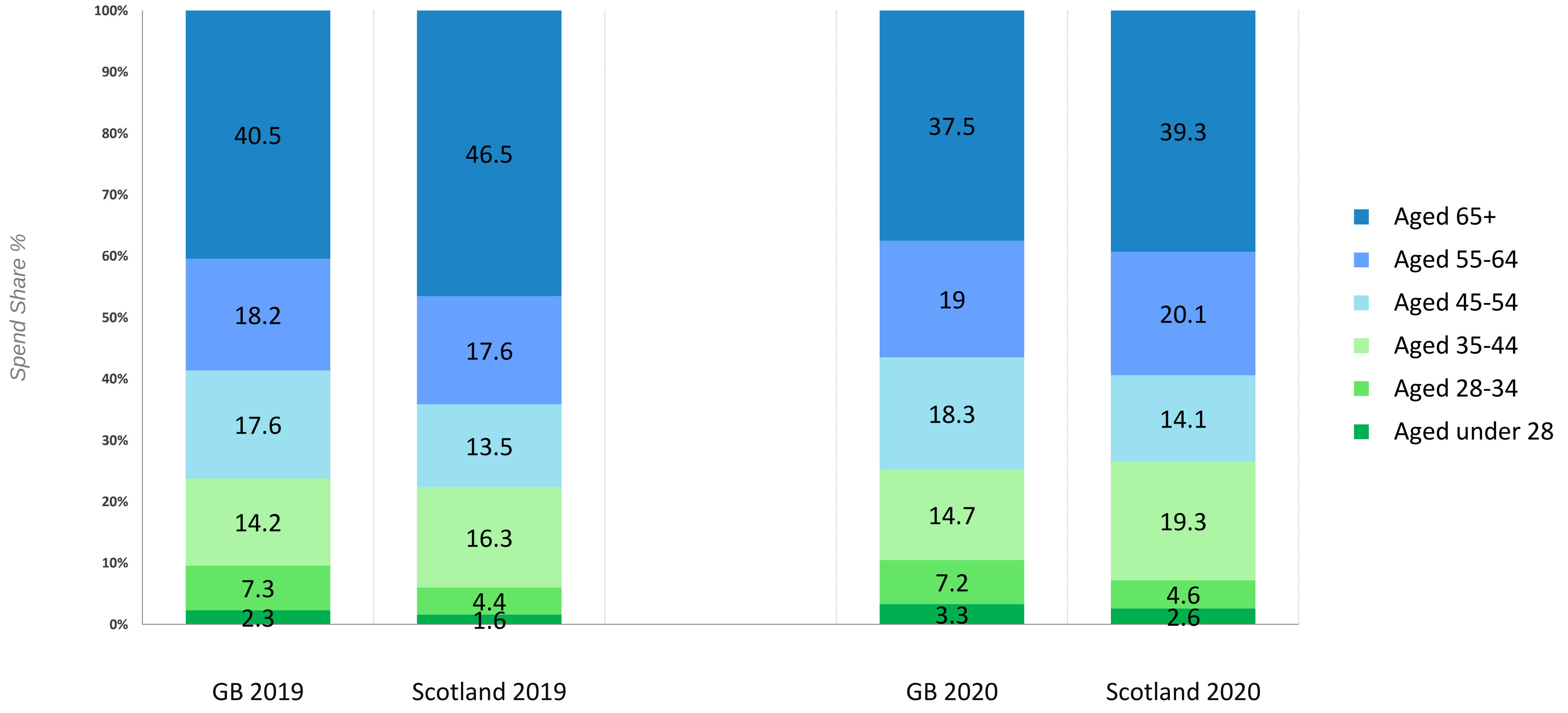


At a total GB level, Children aged 0-4 have increased their share of Non-Dairy Yoghurt Alternative YoY (%)

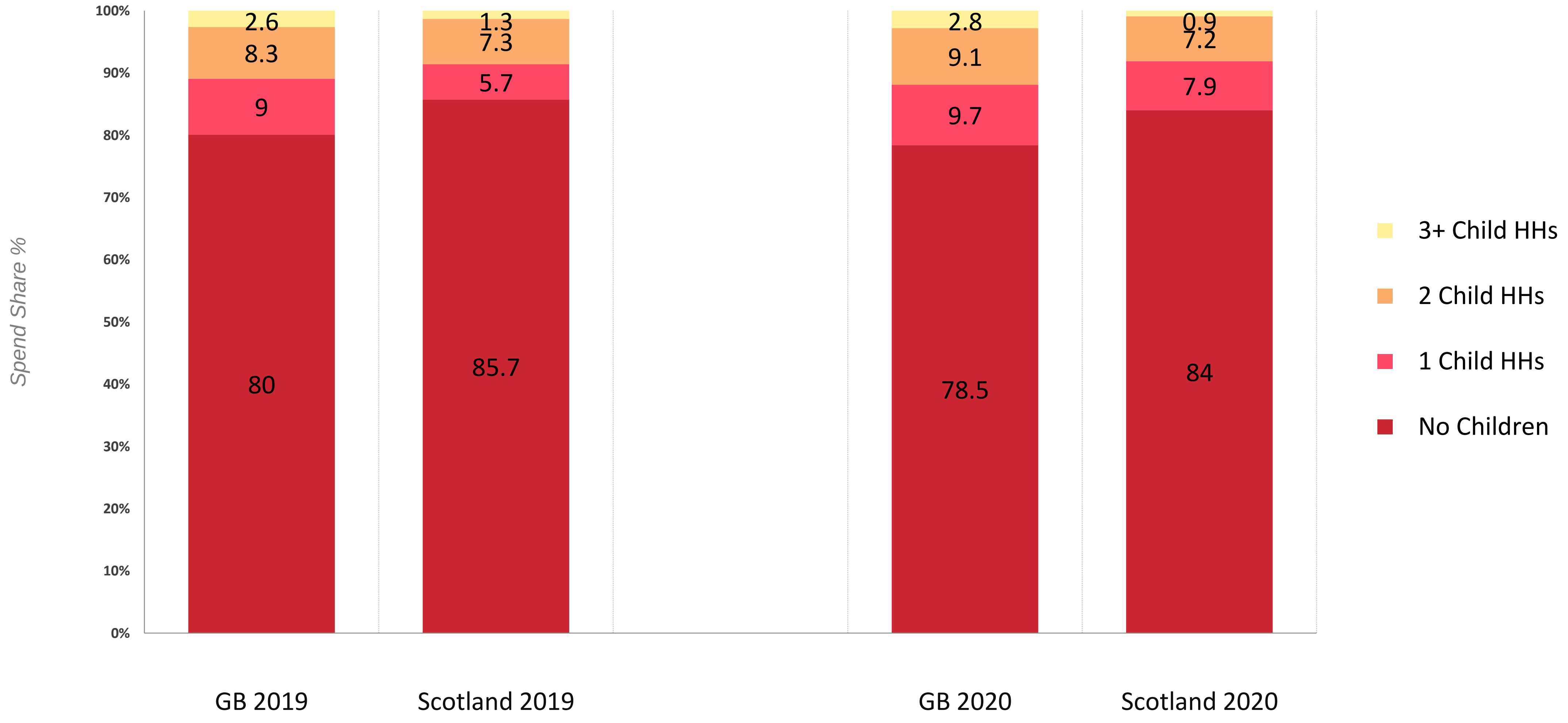




Nearly 60% of Porridge Oats sales come from households aged over 55 years – this is slightly higher than that of GB but lower than in 2019.



Porridge Oats are more likely to engage households without children across the board (Scotland Grocery level: 79% Childless HHs 2020)



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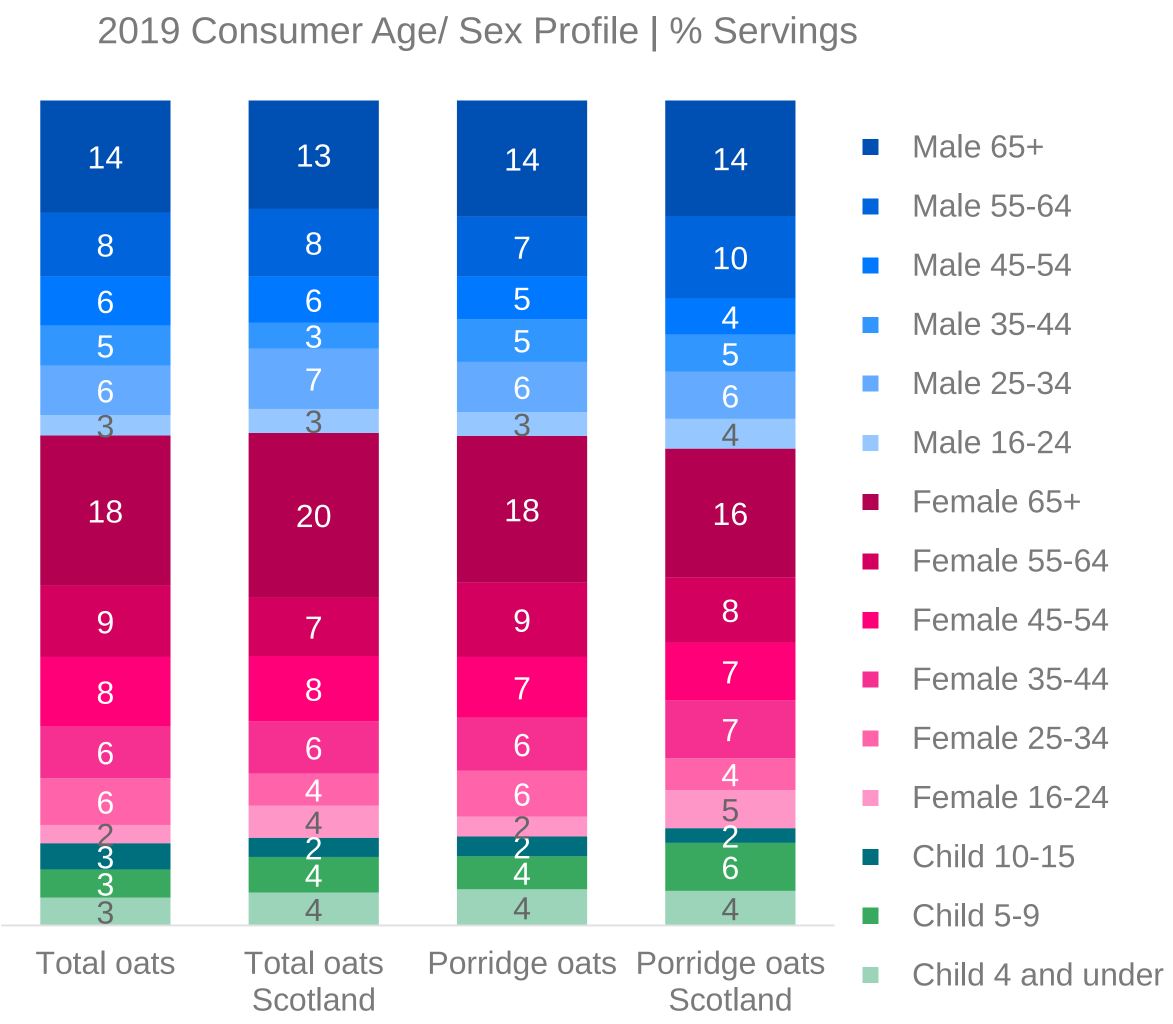
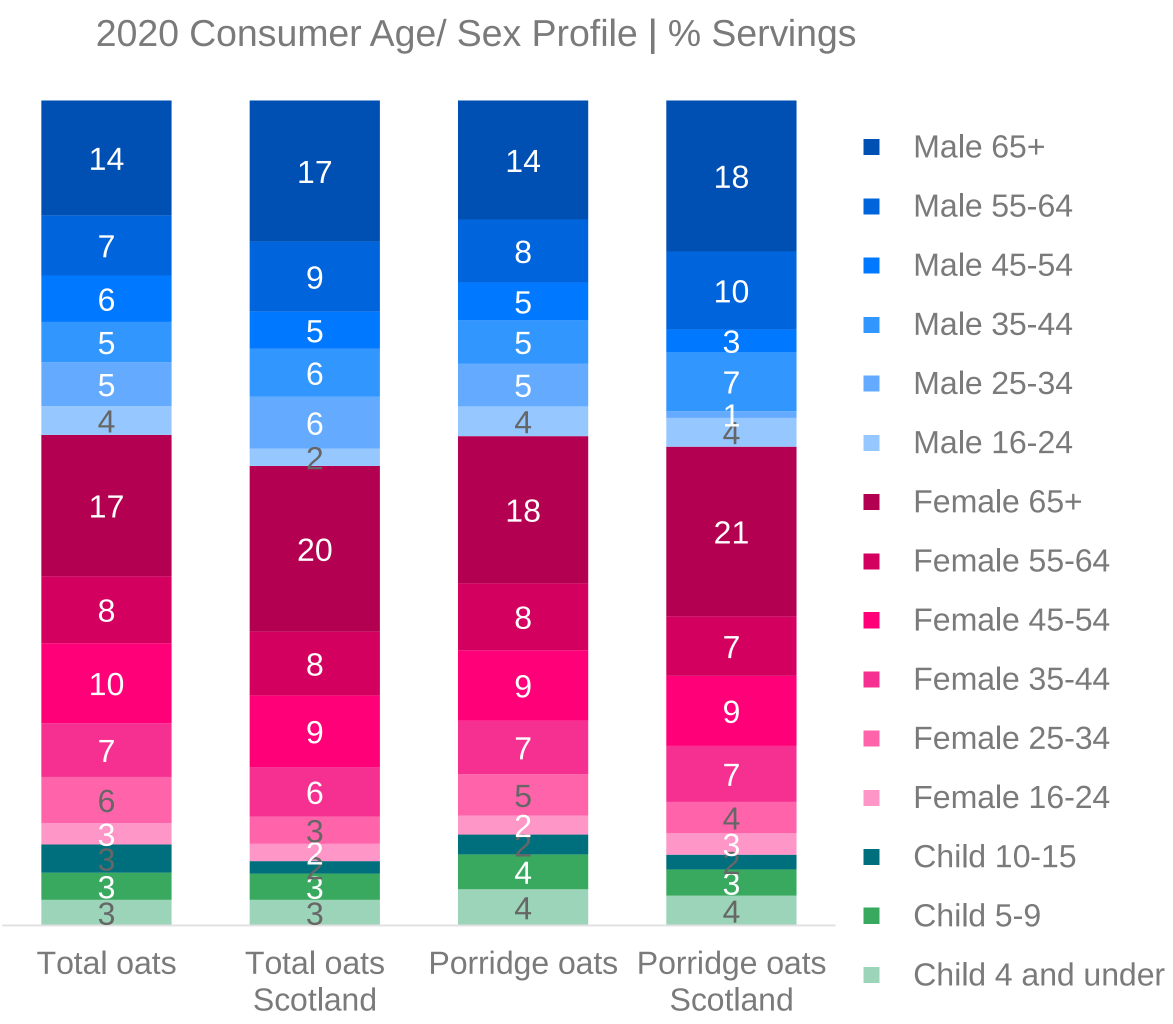
Children make up a slightly larger share of Porridge Oat consumption in Scotland vs GB
In 2020, the proportion of Porridge Oats consumed by the over 65s in Scotland increased.





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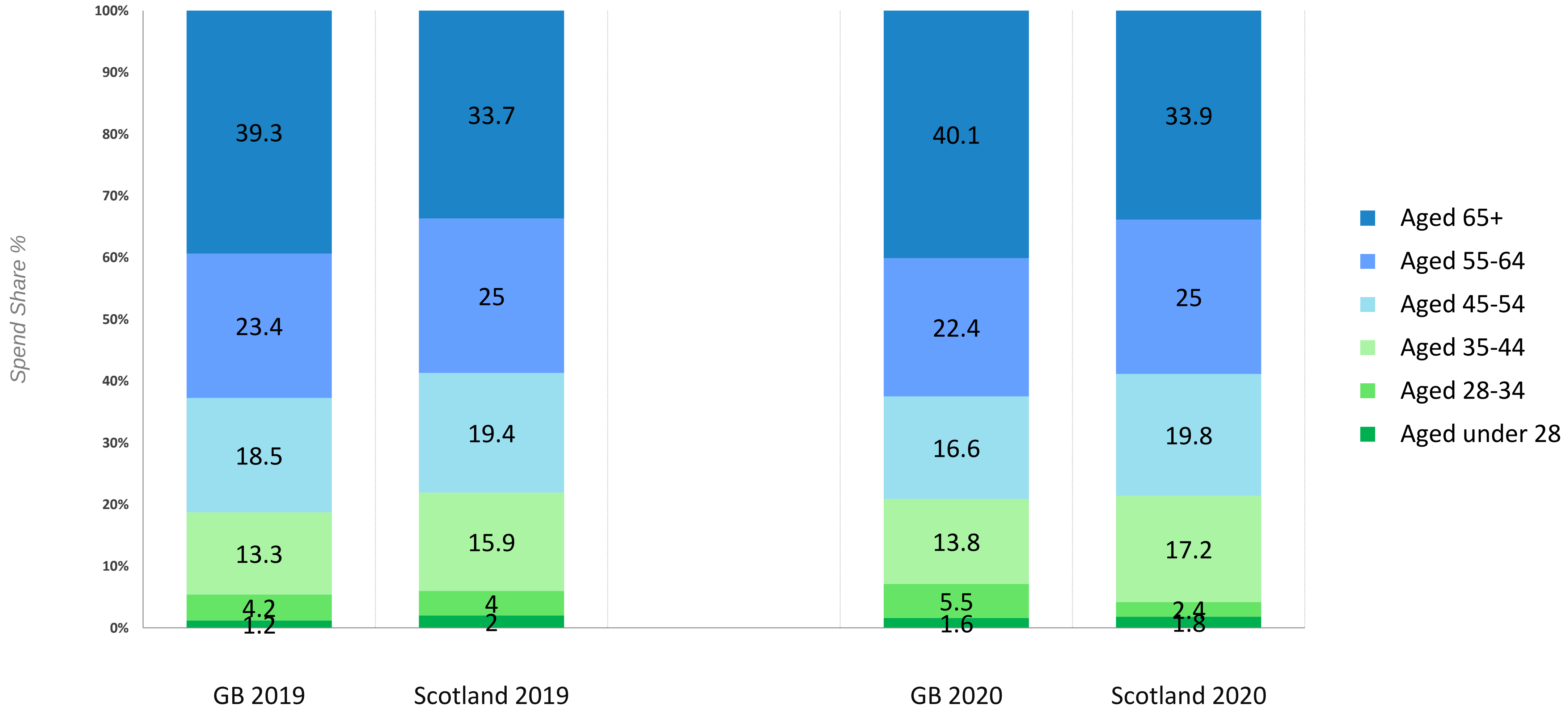
Kantar Usage | In home and carried out | GB and Scotland | 52 w/e 27 Dec 2020 vs LY

Oatcakes in Scotland are more likely to be purchased across the population, with the spend shares being similar to that of grocery, whereas across GB, an older shopper is engaged.



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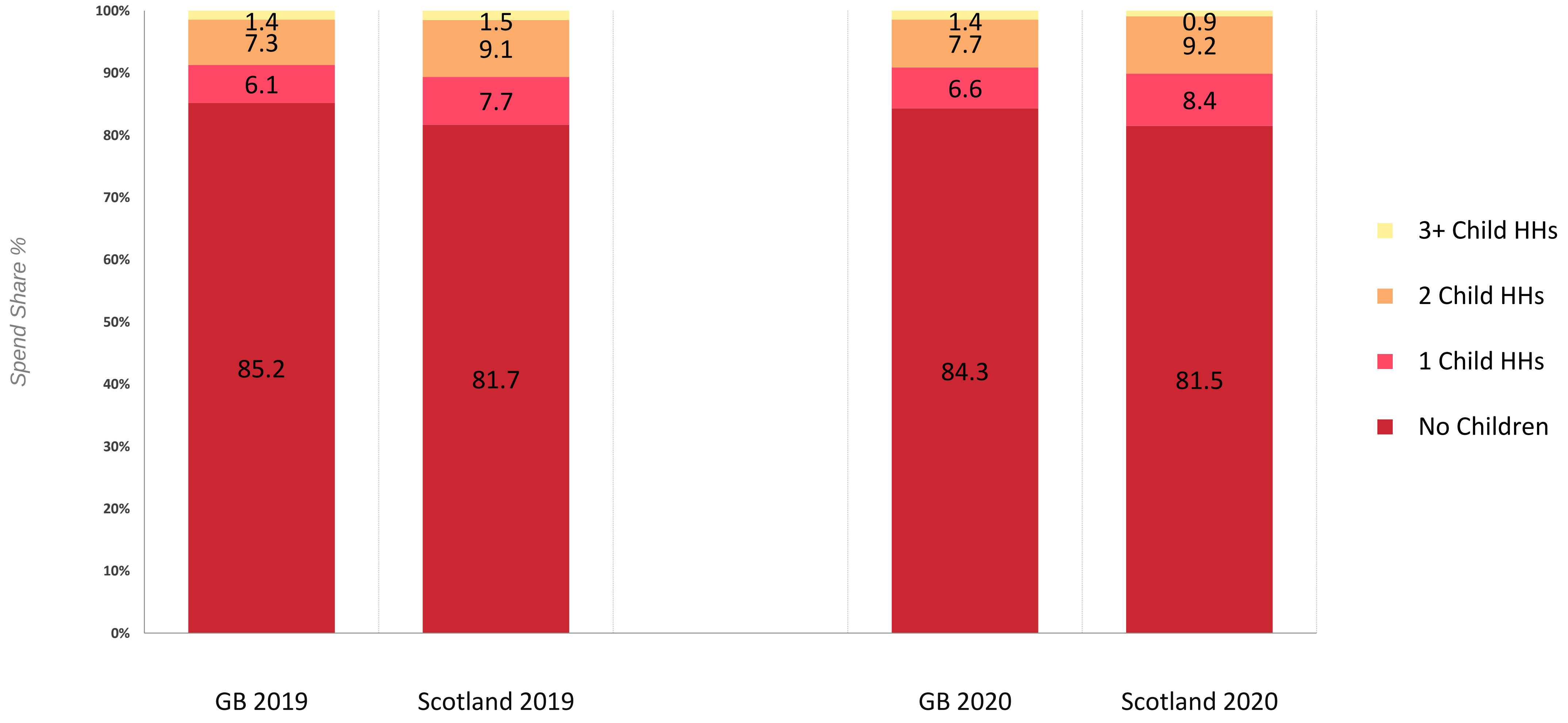
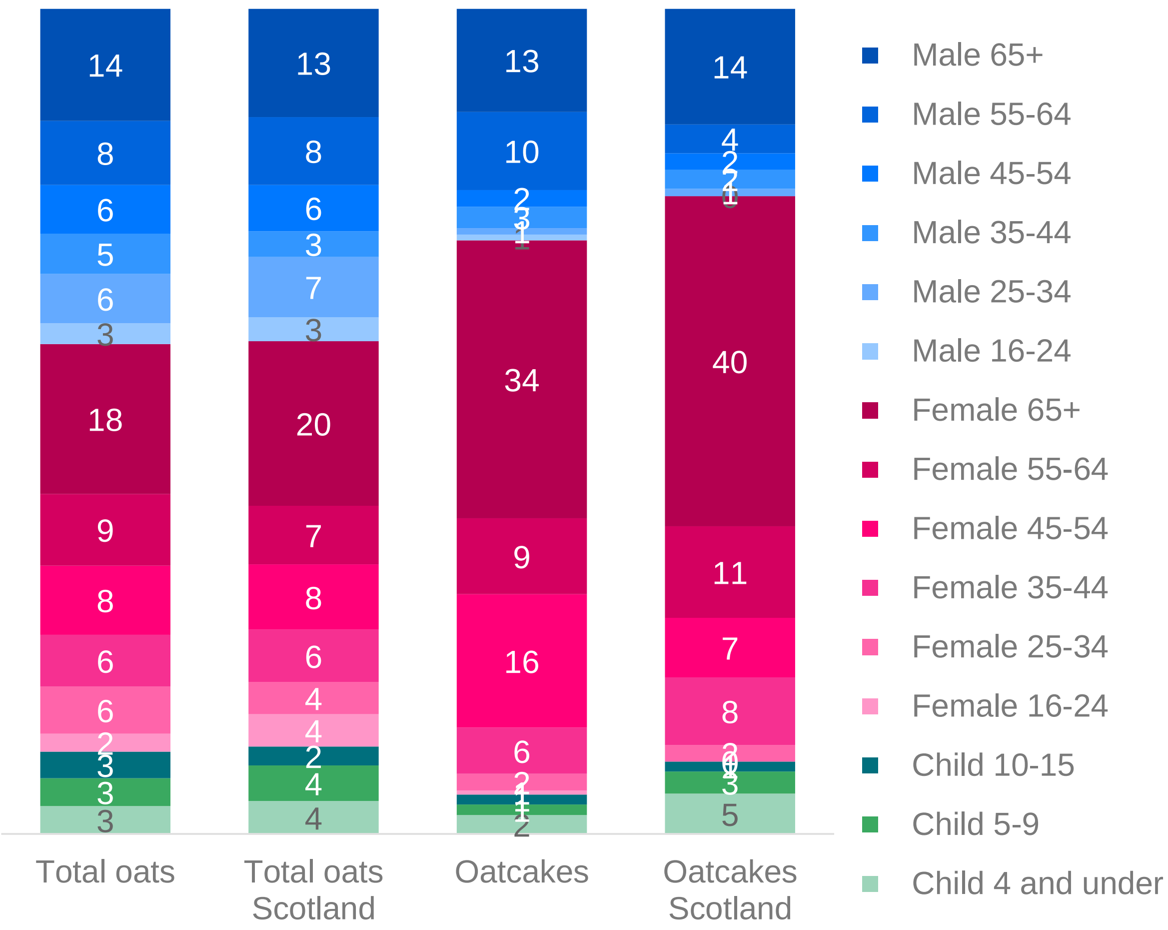
Across GB, Oatcakes is the category with the highest proportion of spend coming from No Children HHs. Scotland differs though, over indexing in HHs with children vs GB.

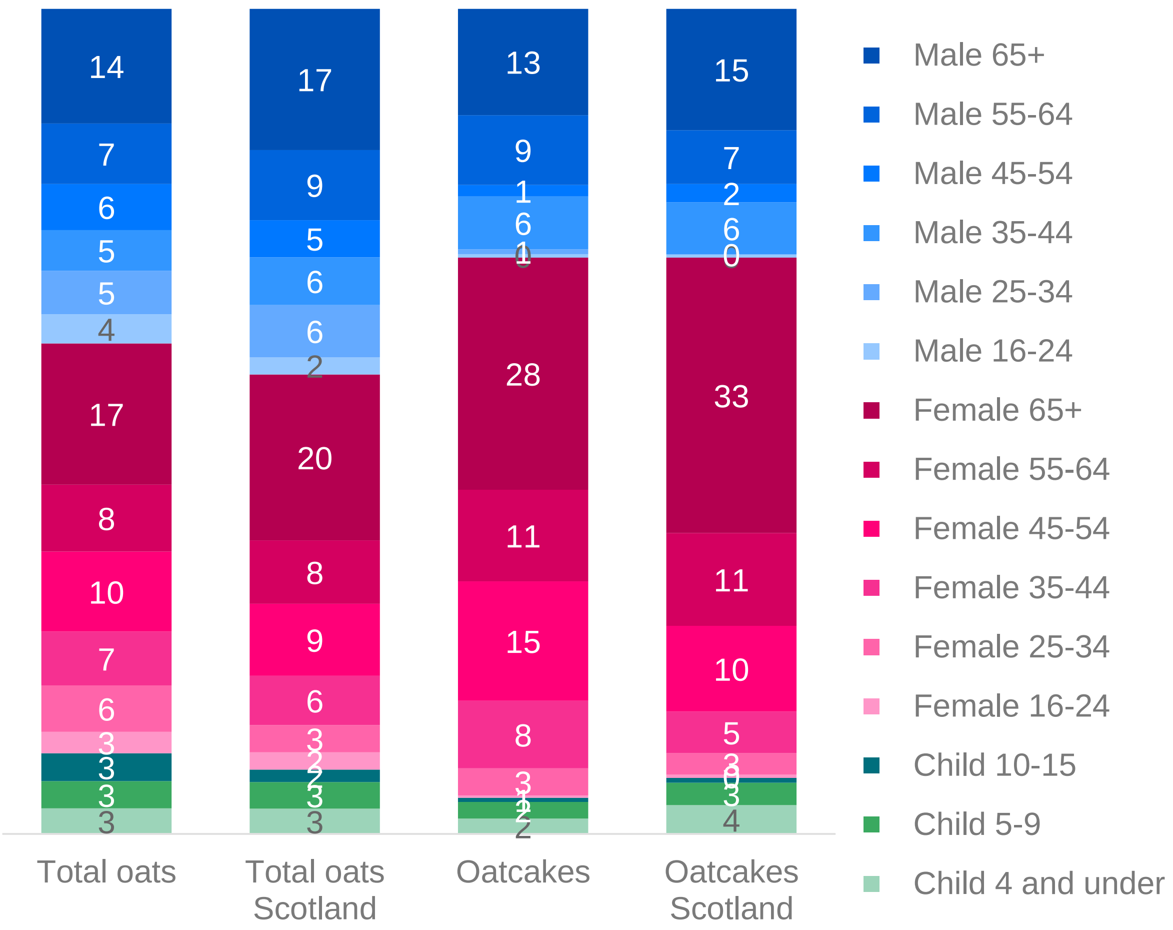


Oatcakes are heavily skewed towards older females (Scotland and GB are similar) - though this has become less pronounced in the last year

2019 Consumer Age/ Sex Profile | % Servings



2020 Consumer Age/ Sex Profile | % Servings



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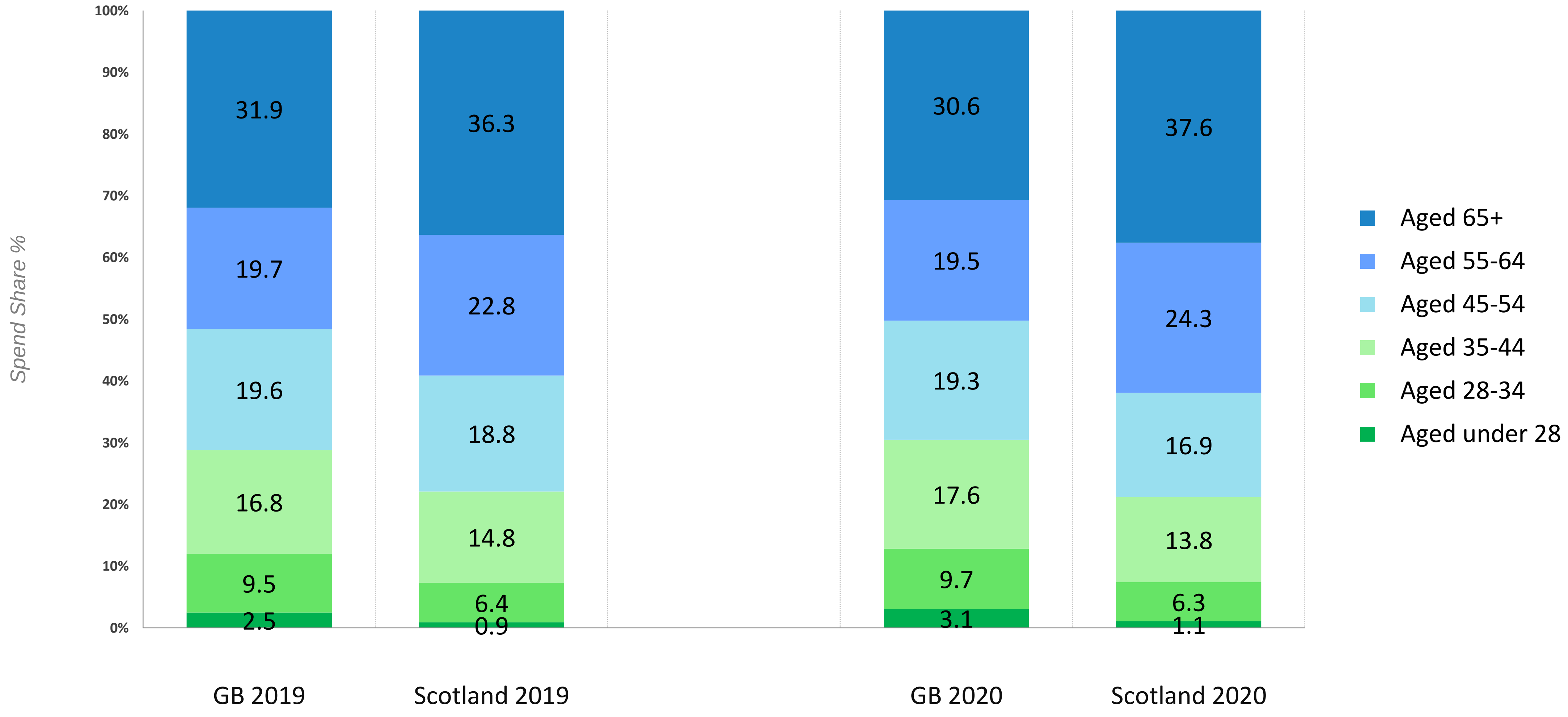
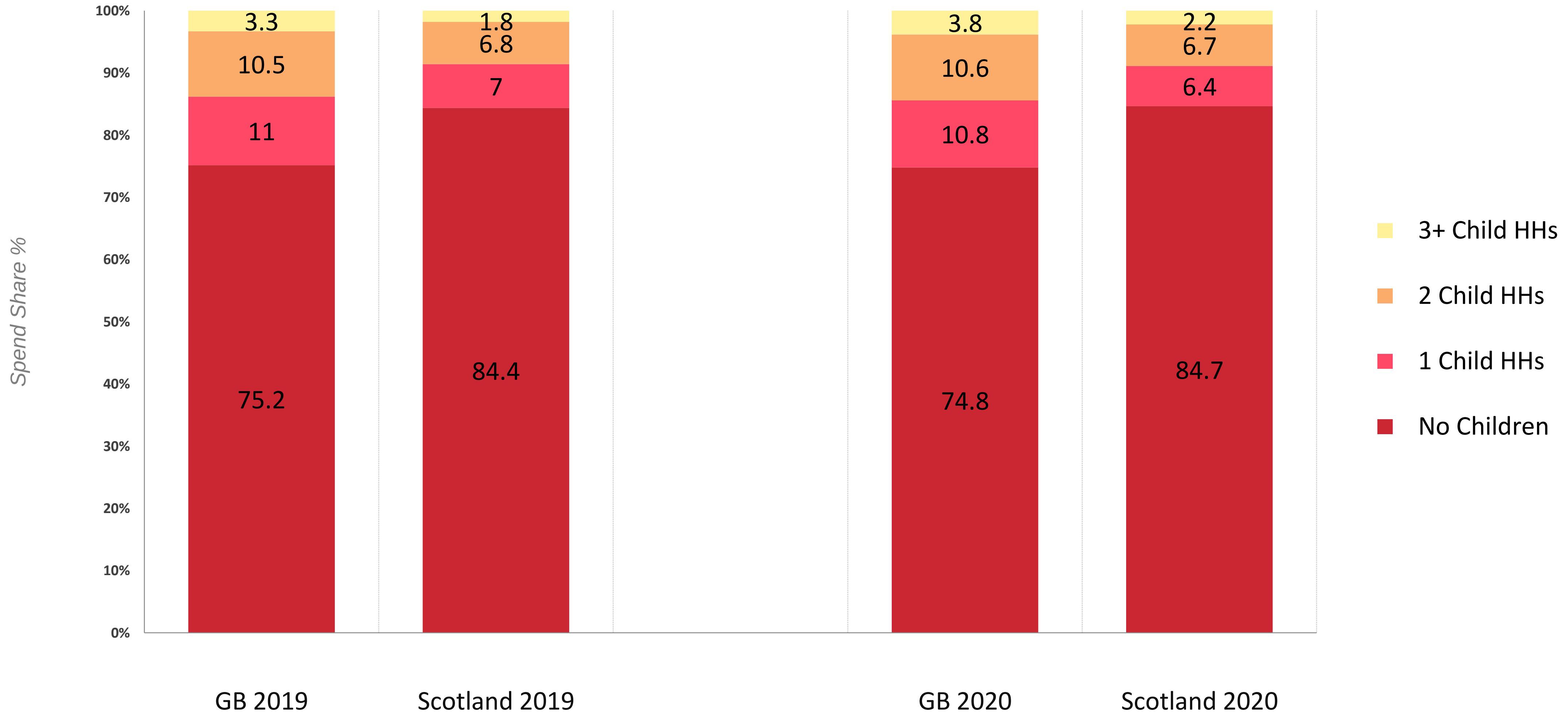
Oat Biscuits has one of Scotland's older demographic profiles, which has become more pronounced in the last year.



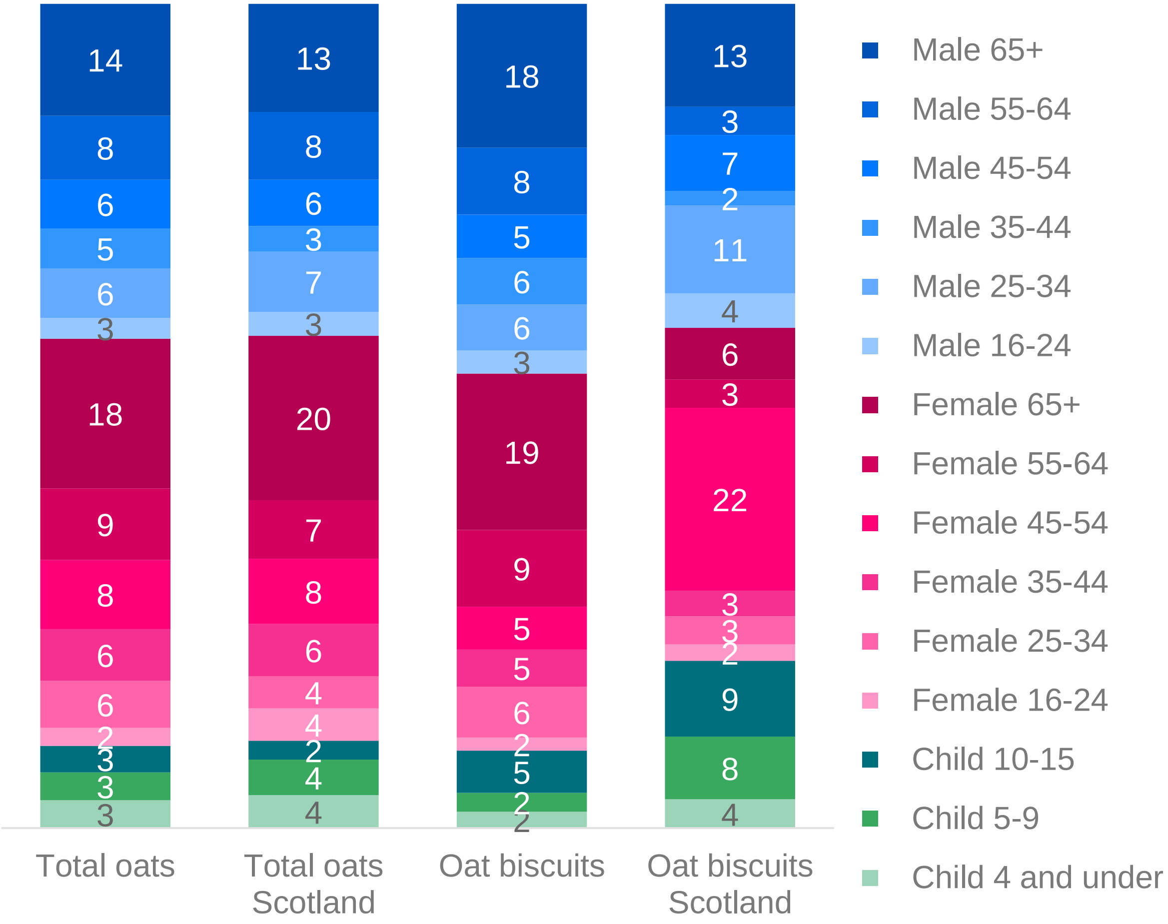
Reliance on childless HHs is more prominent in Scotland than GB for Oat Biscuits.



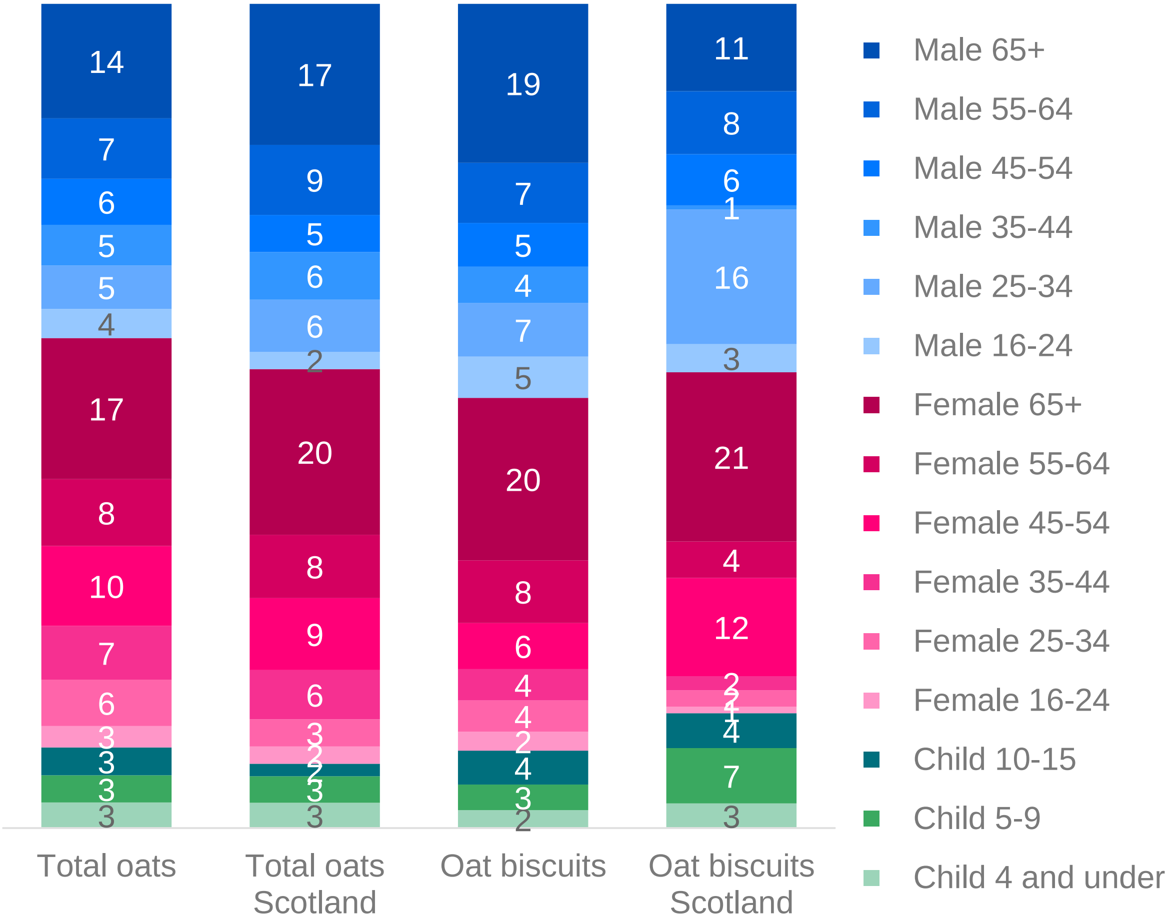
Of all the Oat based products included in the analysis, children consume the most oat biscuits in Scotland…

… though they have consumed less in the last year (-% YoY)

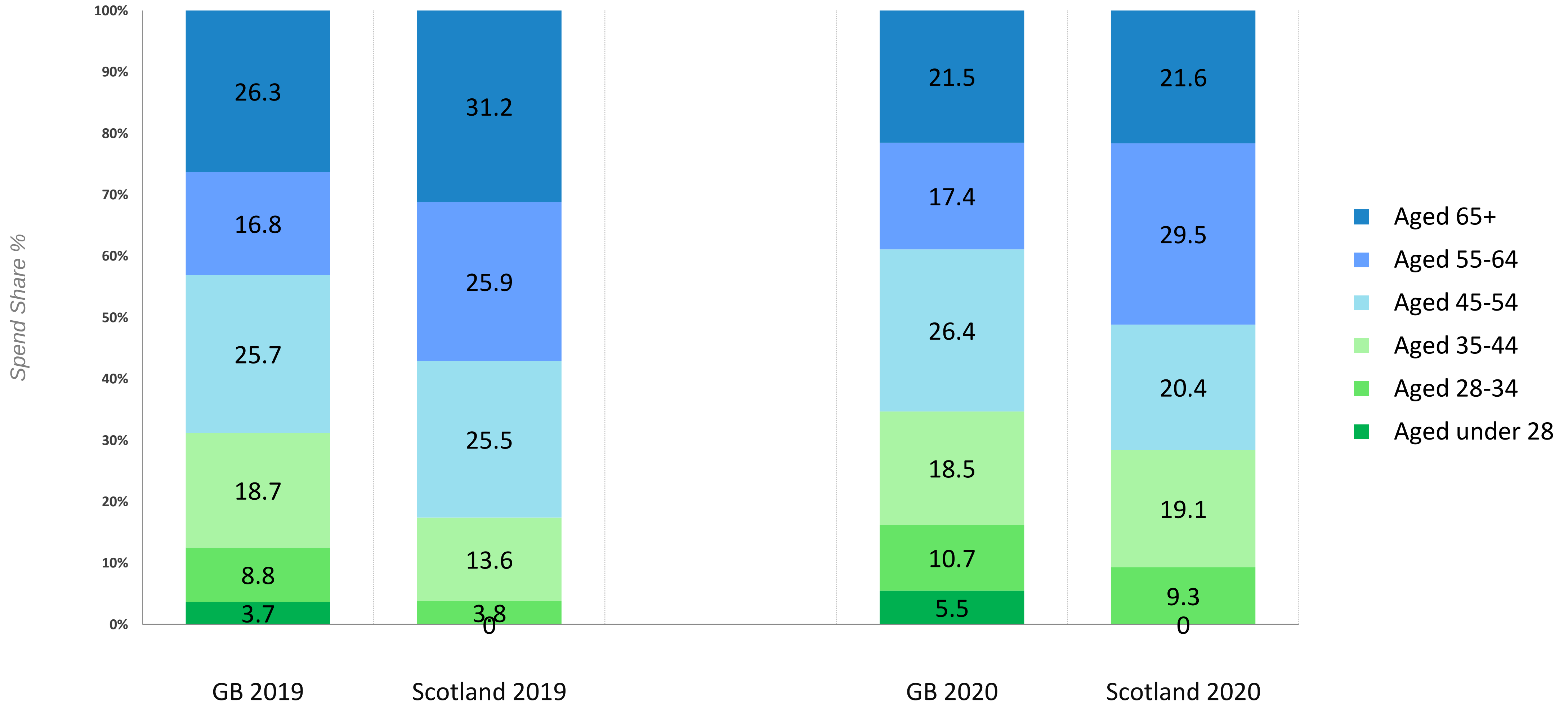
2019 Consumer Age/ Sex Profile | % Servings



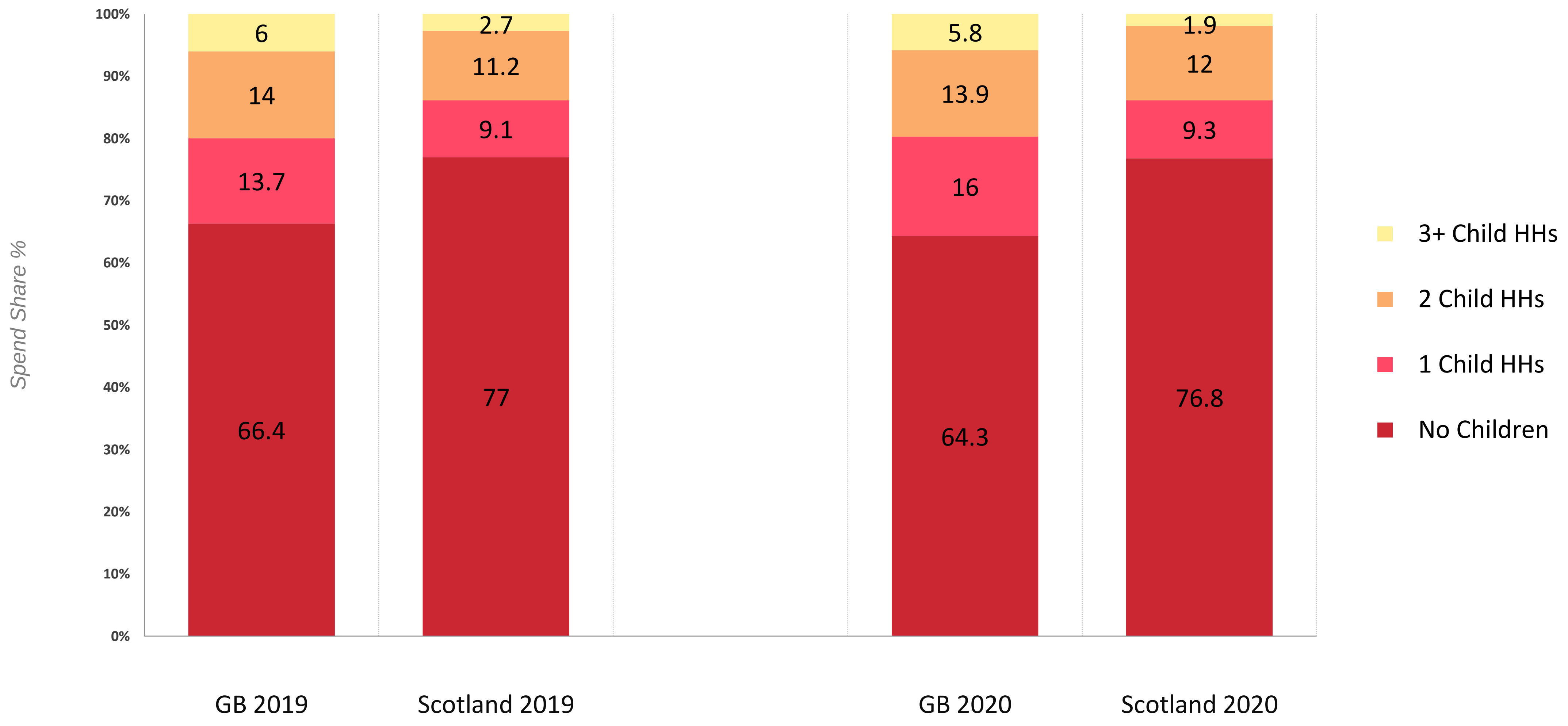
2020 Consumer Age/ Sex Profile | % Servings



The 28-44 age group has become more prominent for the Flapjack market in Scotland.



Across GB, Flapjack is one of the Oat categories that is most purchased by HHs with children.



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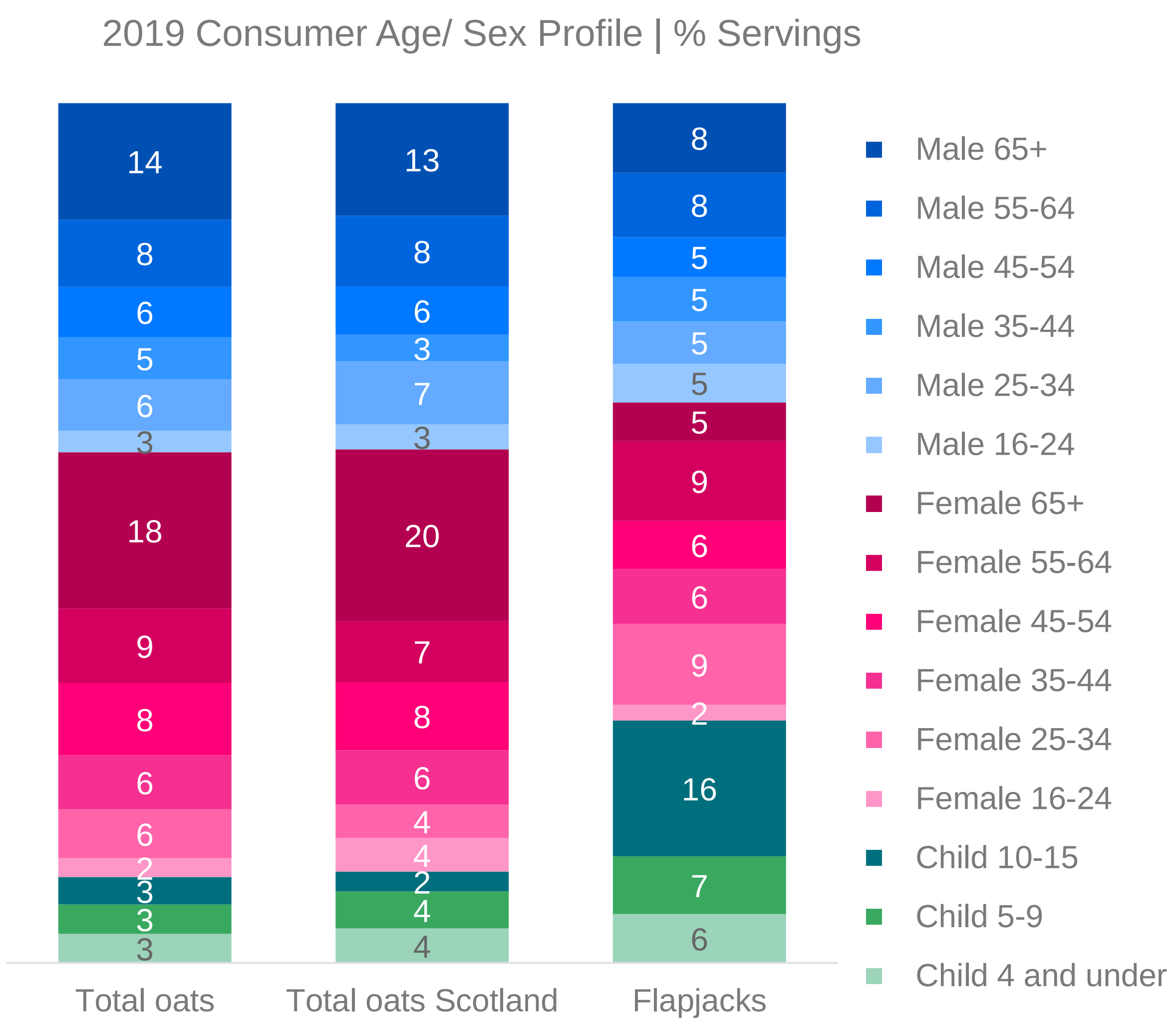
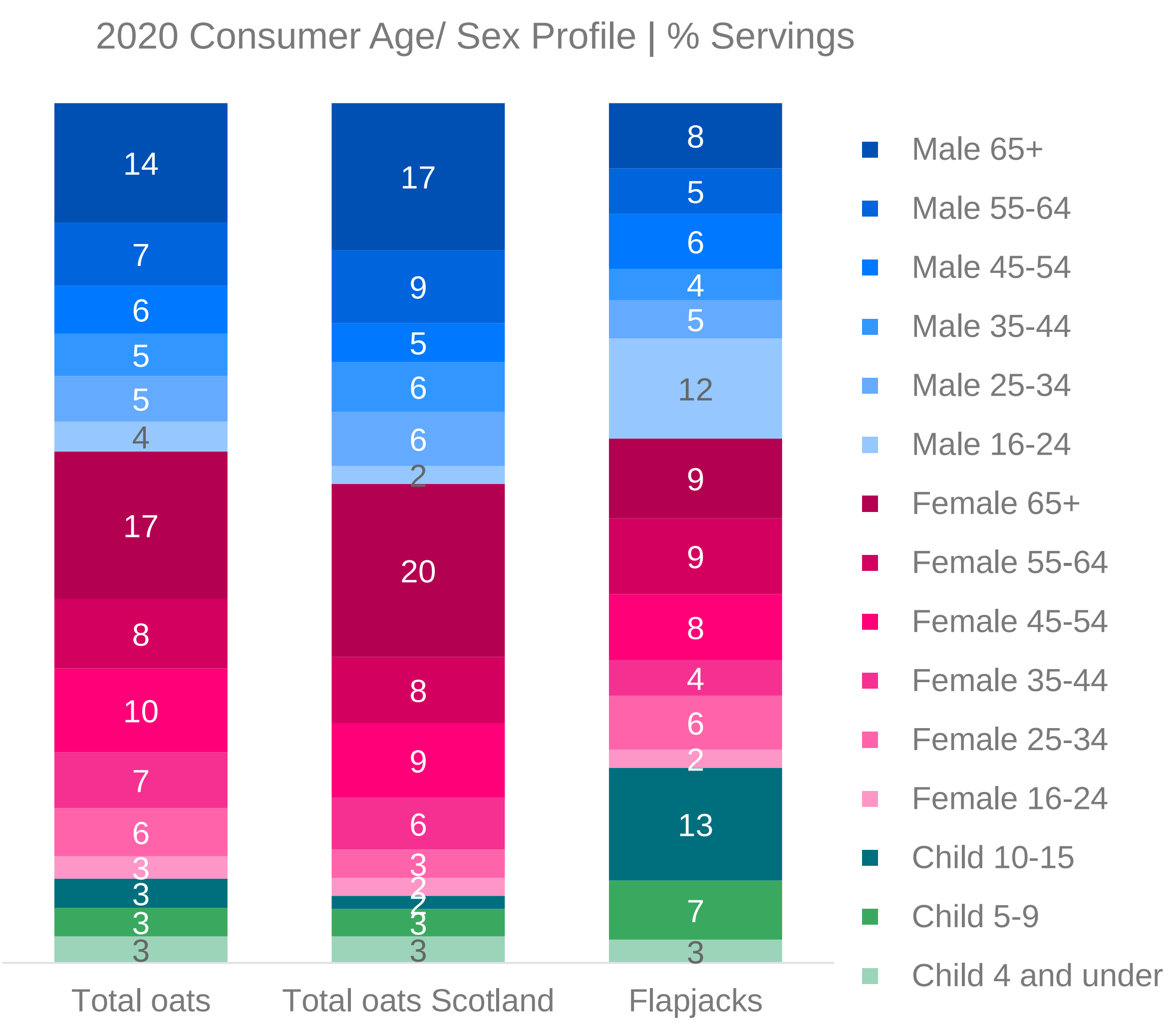
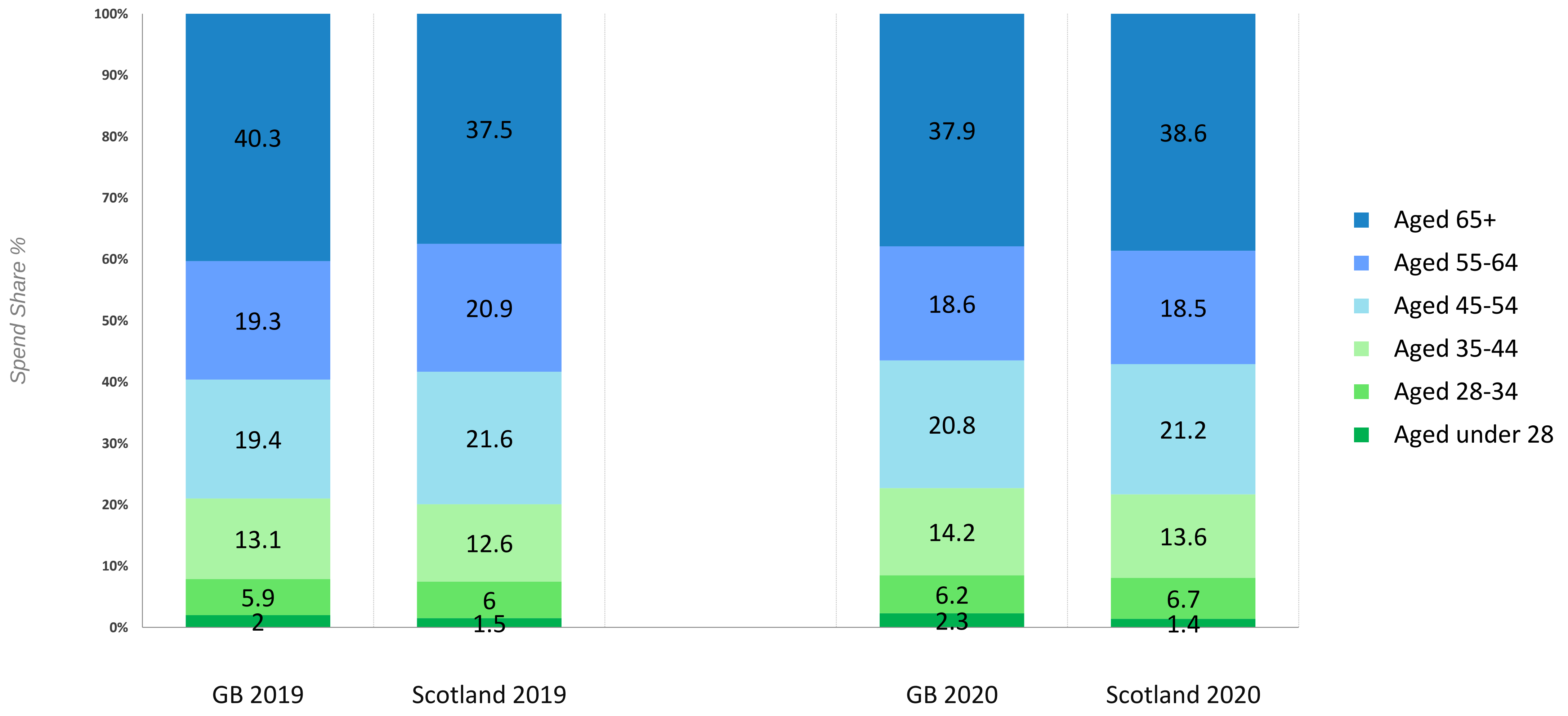
Children now account for 23% of Flapjack occasions in Scotland (down from 28% in 2019), while males aged 16- 24 have seen a significant uplift in share this year

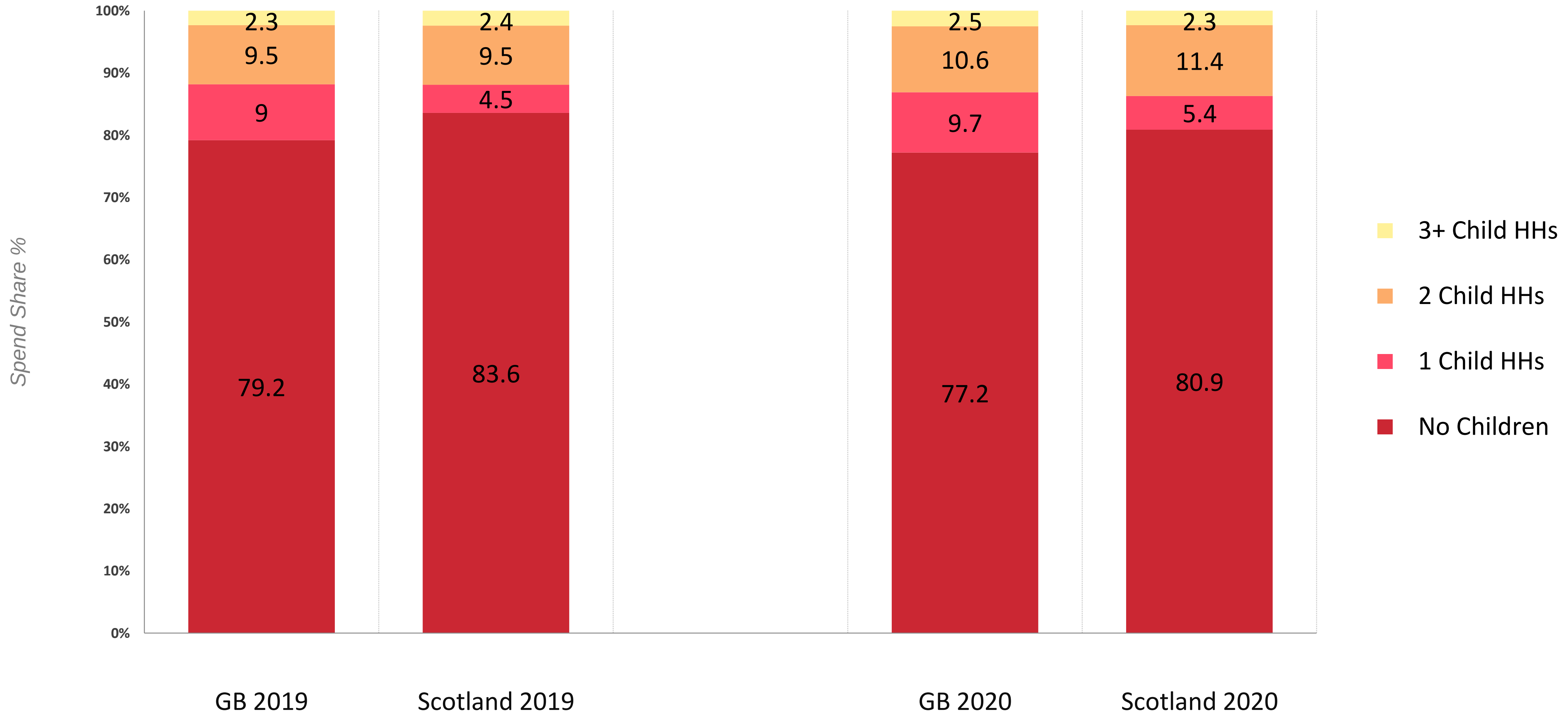




The Muesli shopper profile is relatively closely aligned within Scotland to across GB.



For muesli, HHs with children account for more spend this year compared to last year for both GB and Scotland.



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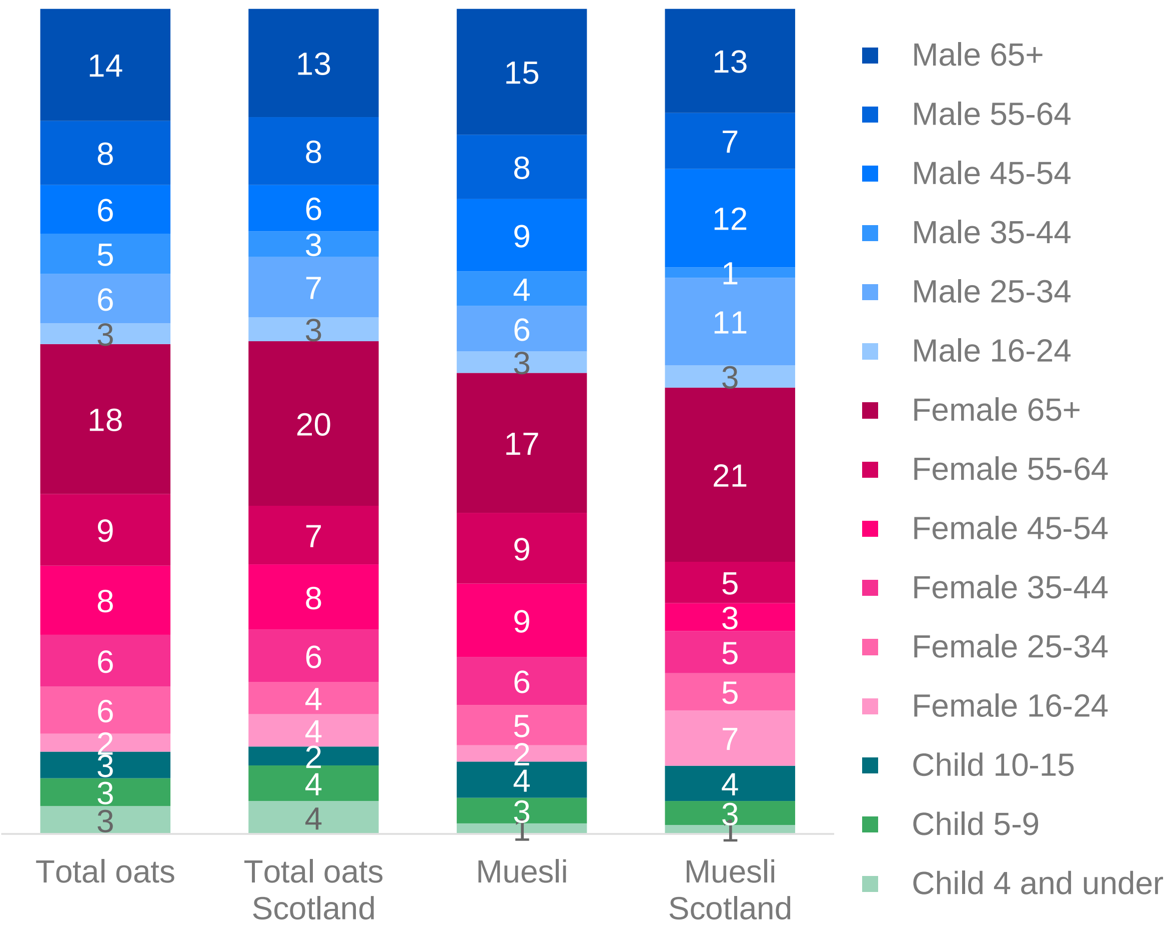
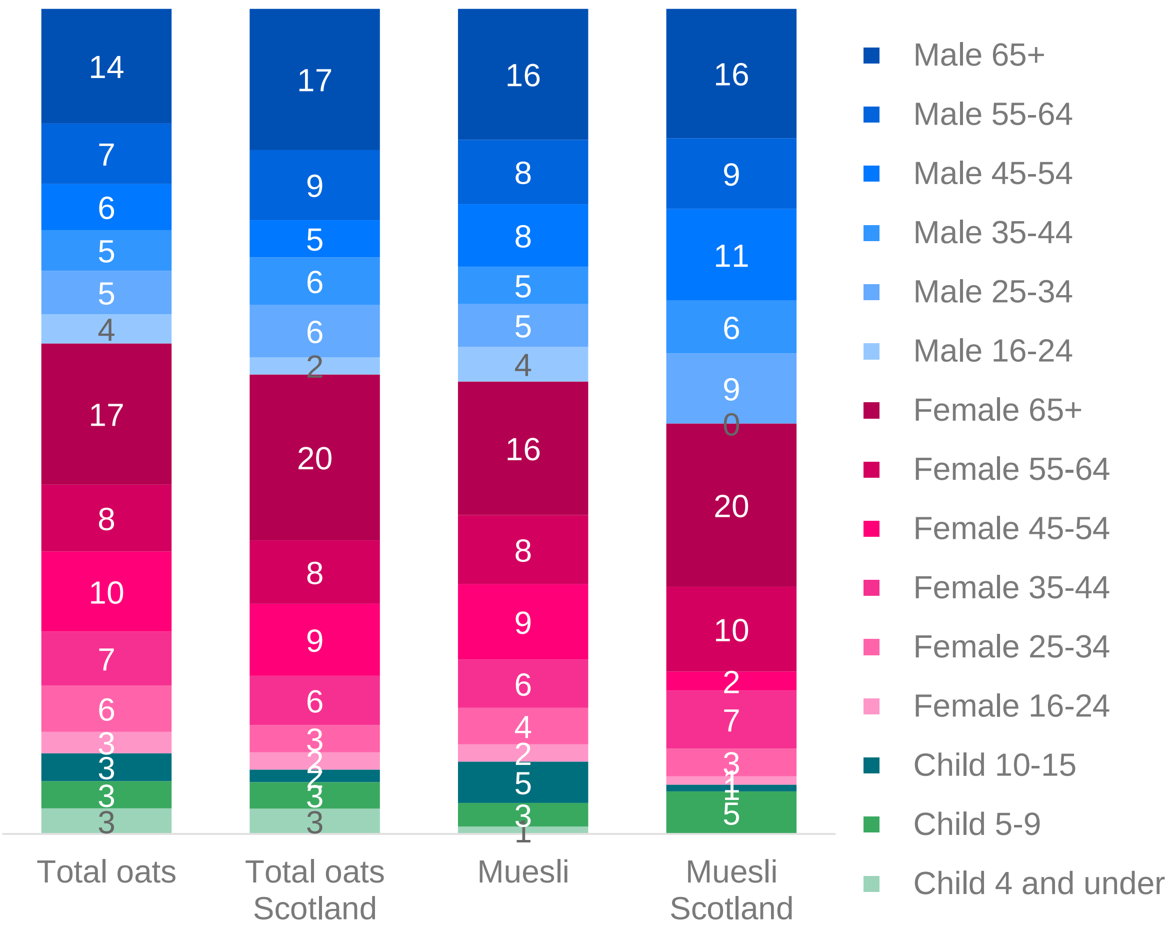
Over the last year, Muesli in Scotland has been consumed more by males 55+

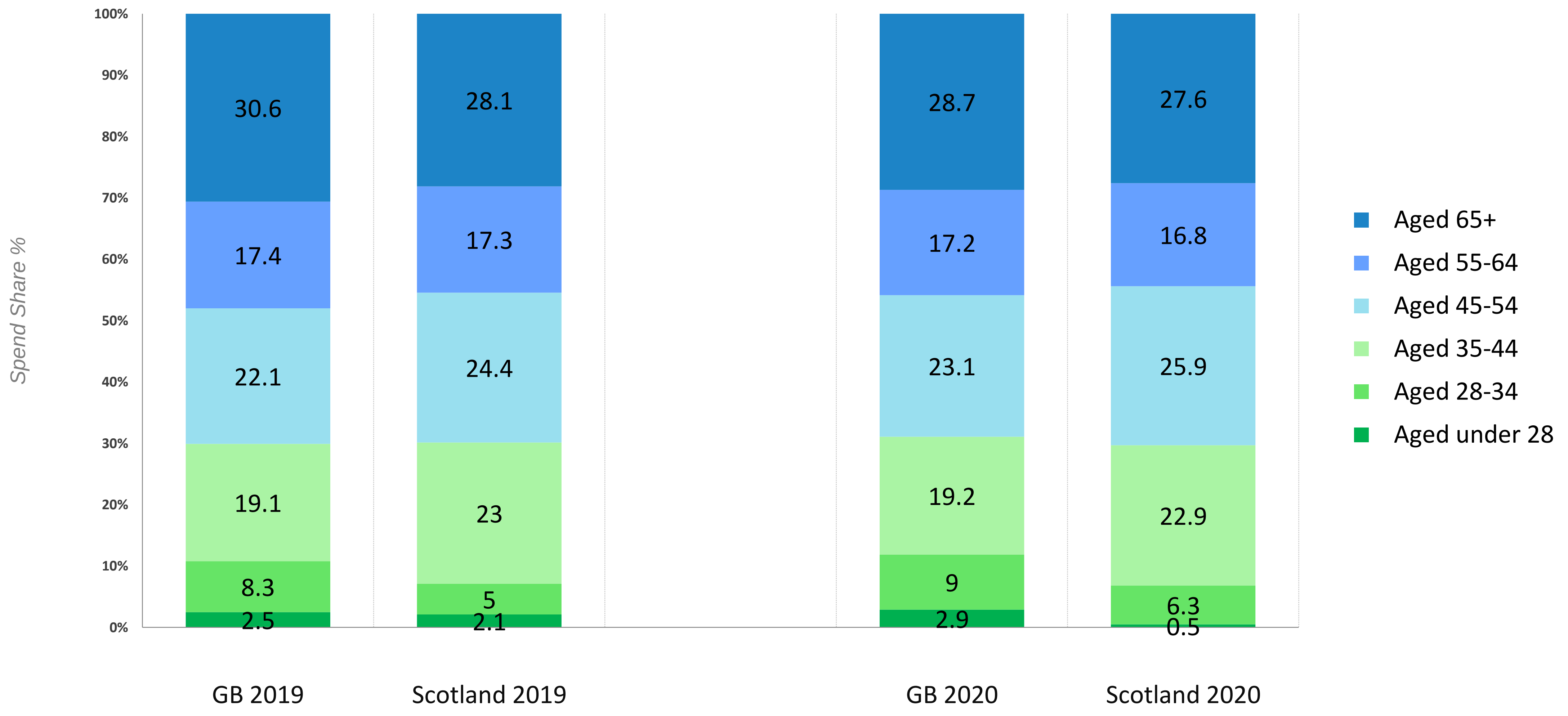
2019 Consumer Age/ Sex Profile | % Servings



2020 Consumer Age/ Sex Profile | % Servings



Granola purchasing HHs in Scotland are more likely to be aged 35-54 years compared to GB



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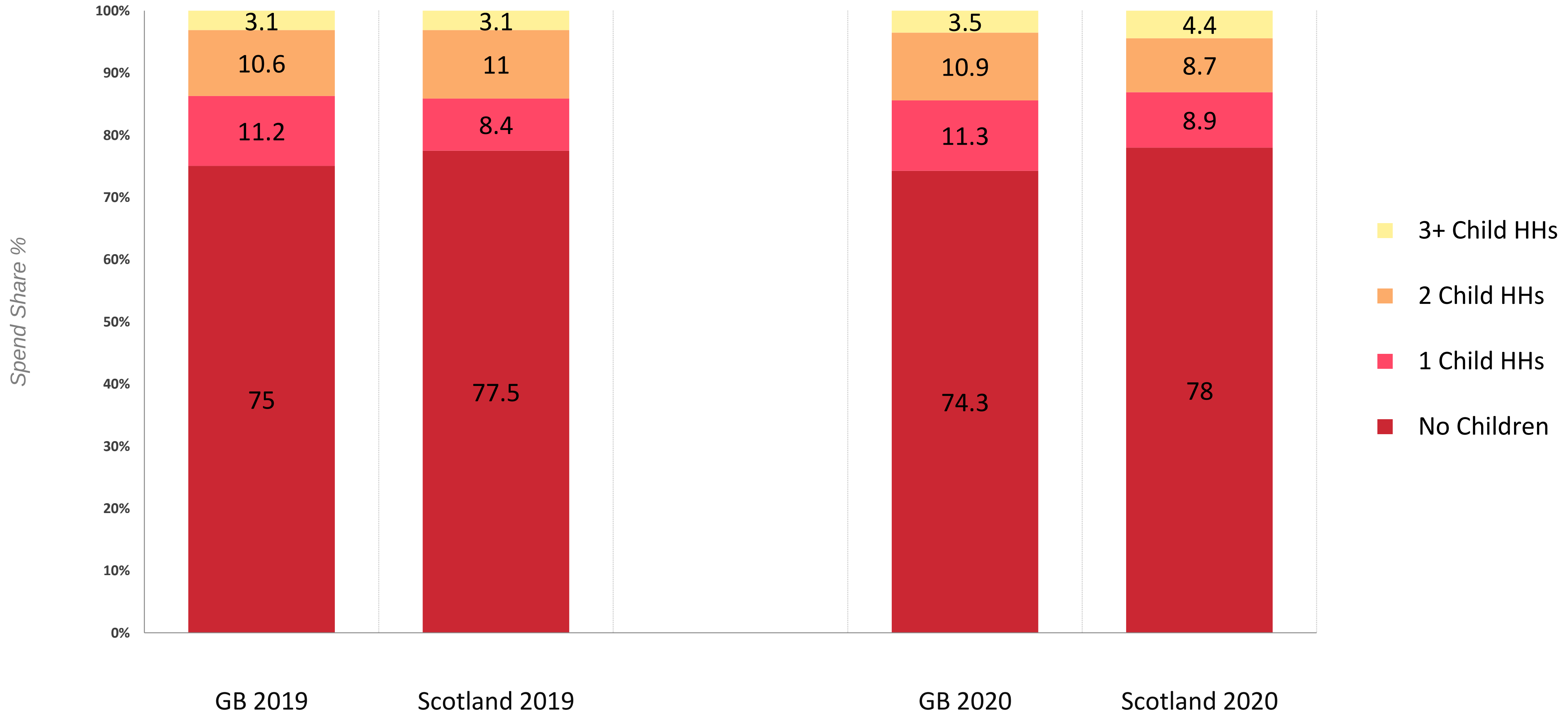
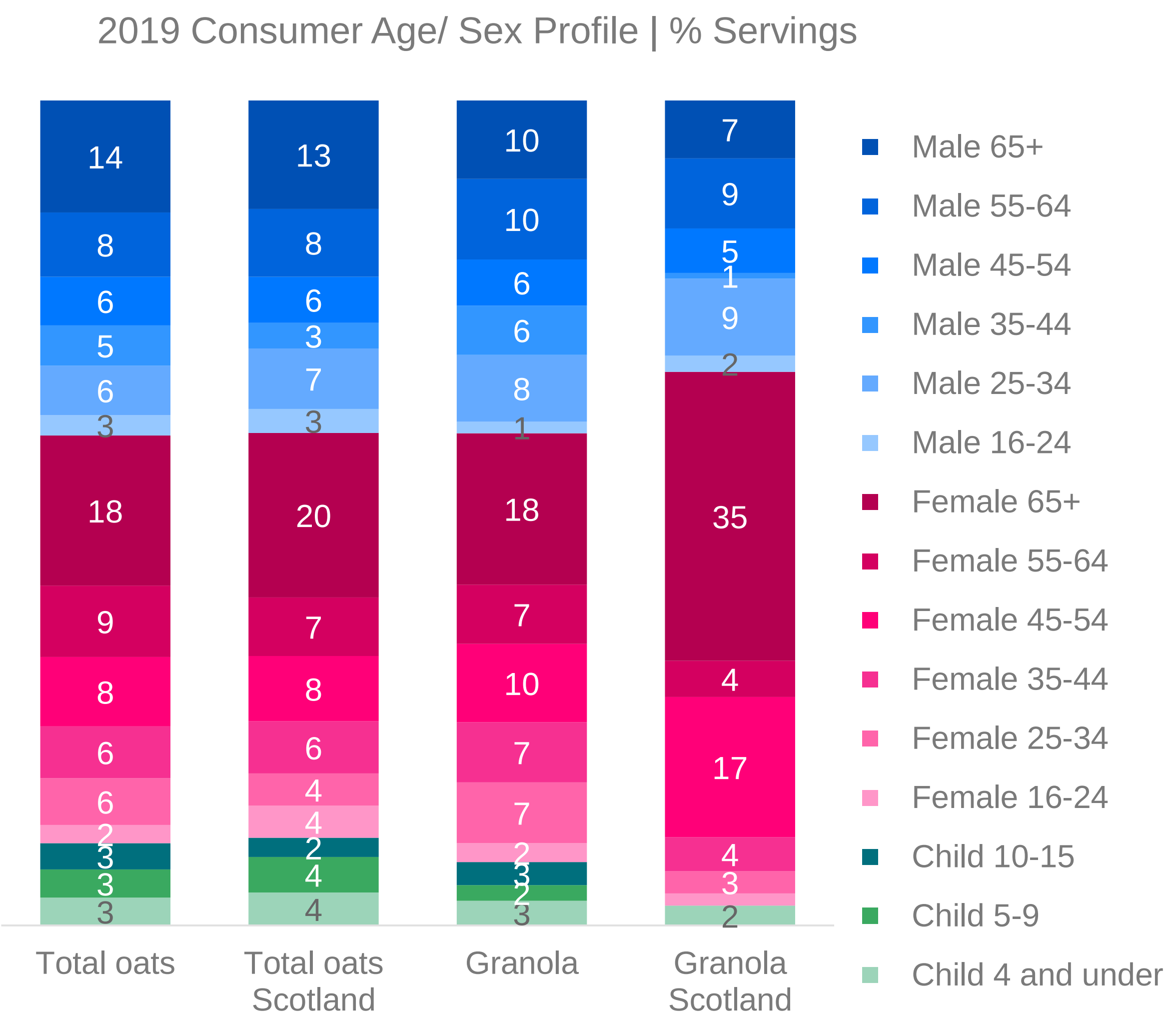
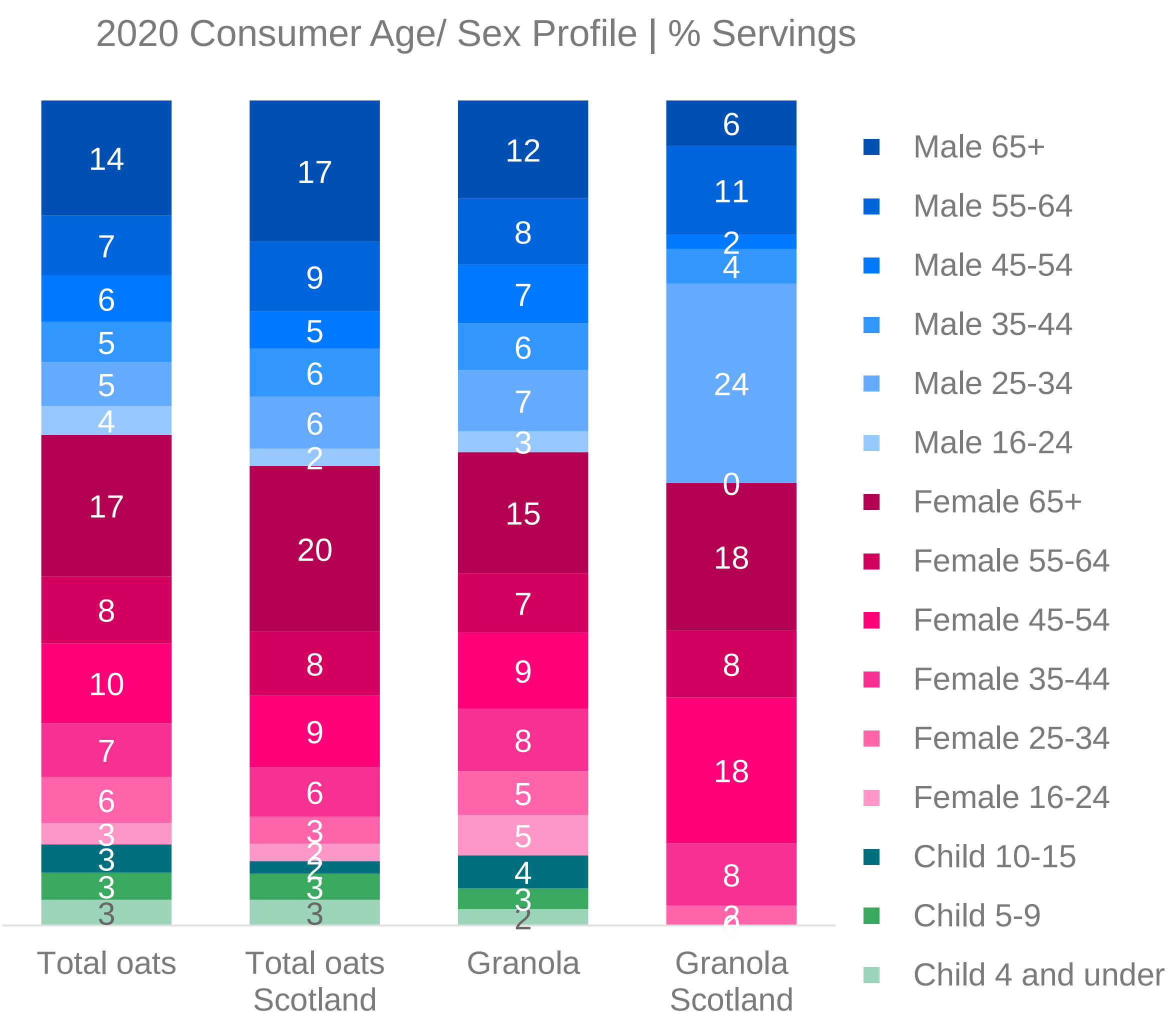
Although the majority of spend comes from childless HHs, the largest difference is the over-index with 3+ children HHs for Scotland vs GB.

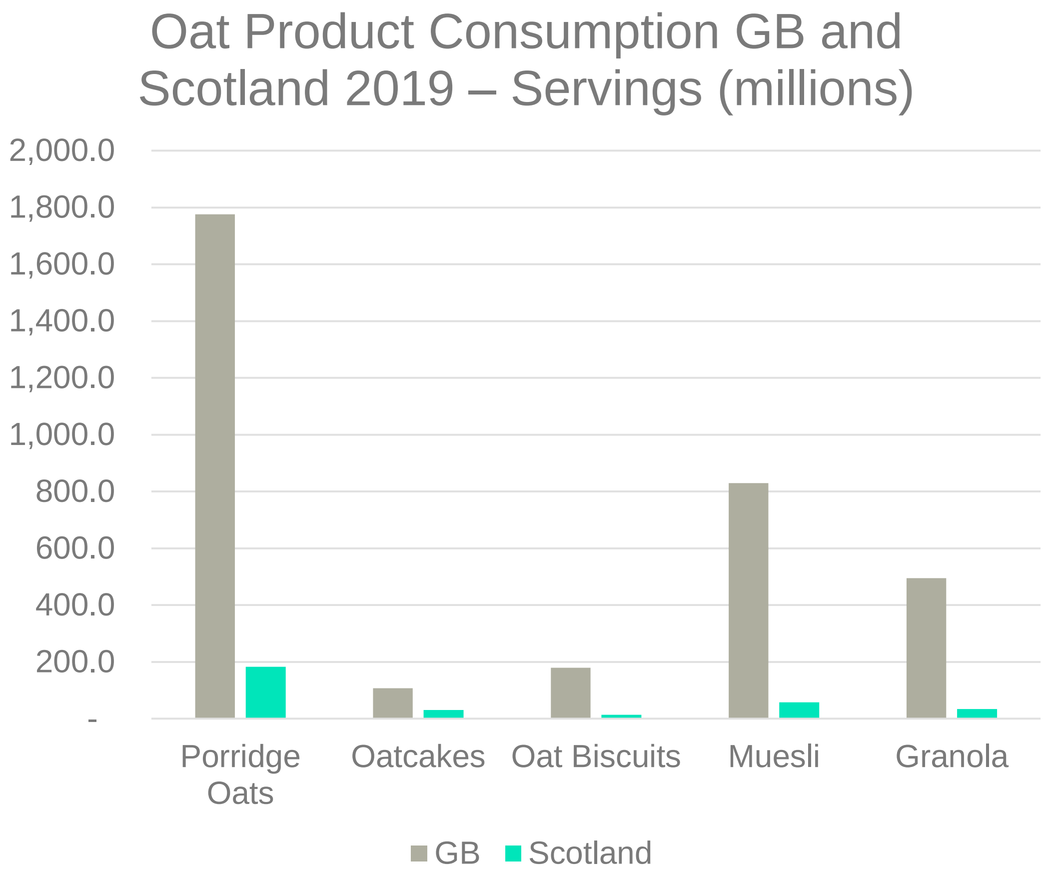


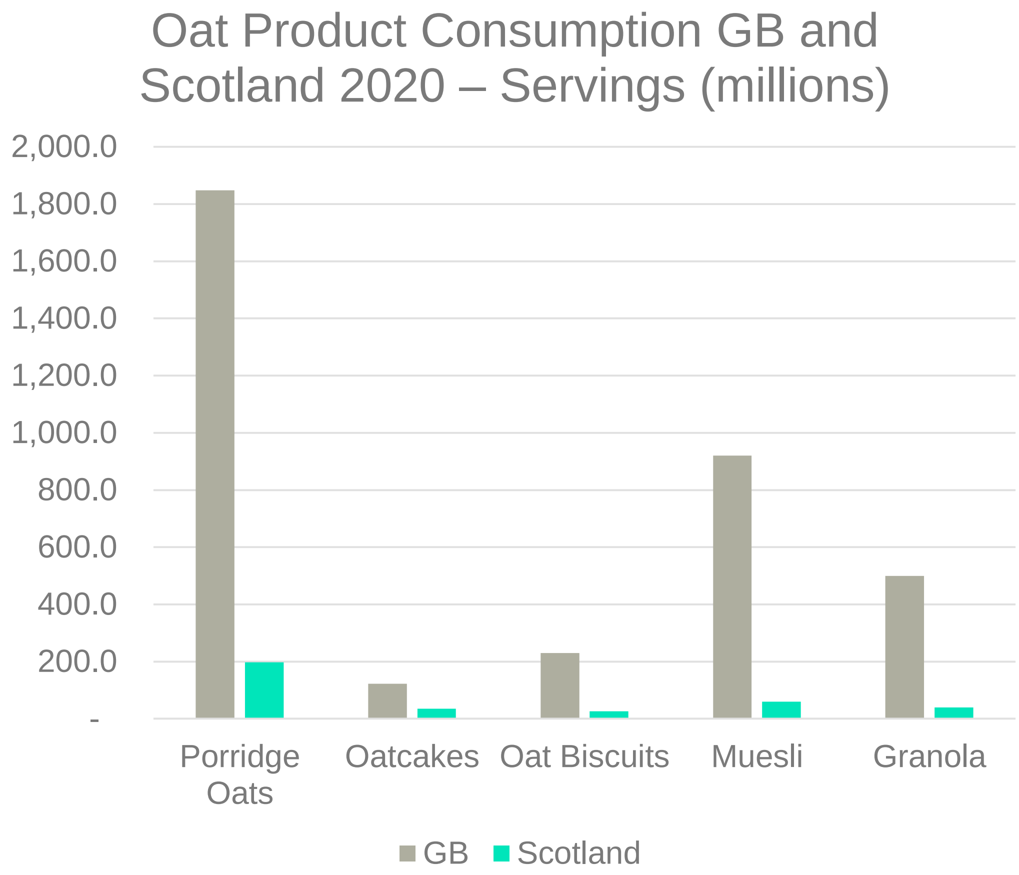
Granola is not a popular choice for children in Scotland. Granola has moved away from being heavily reliant on the females 65+ and males aged 25- 34 have emerged as the core consumers



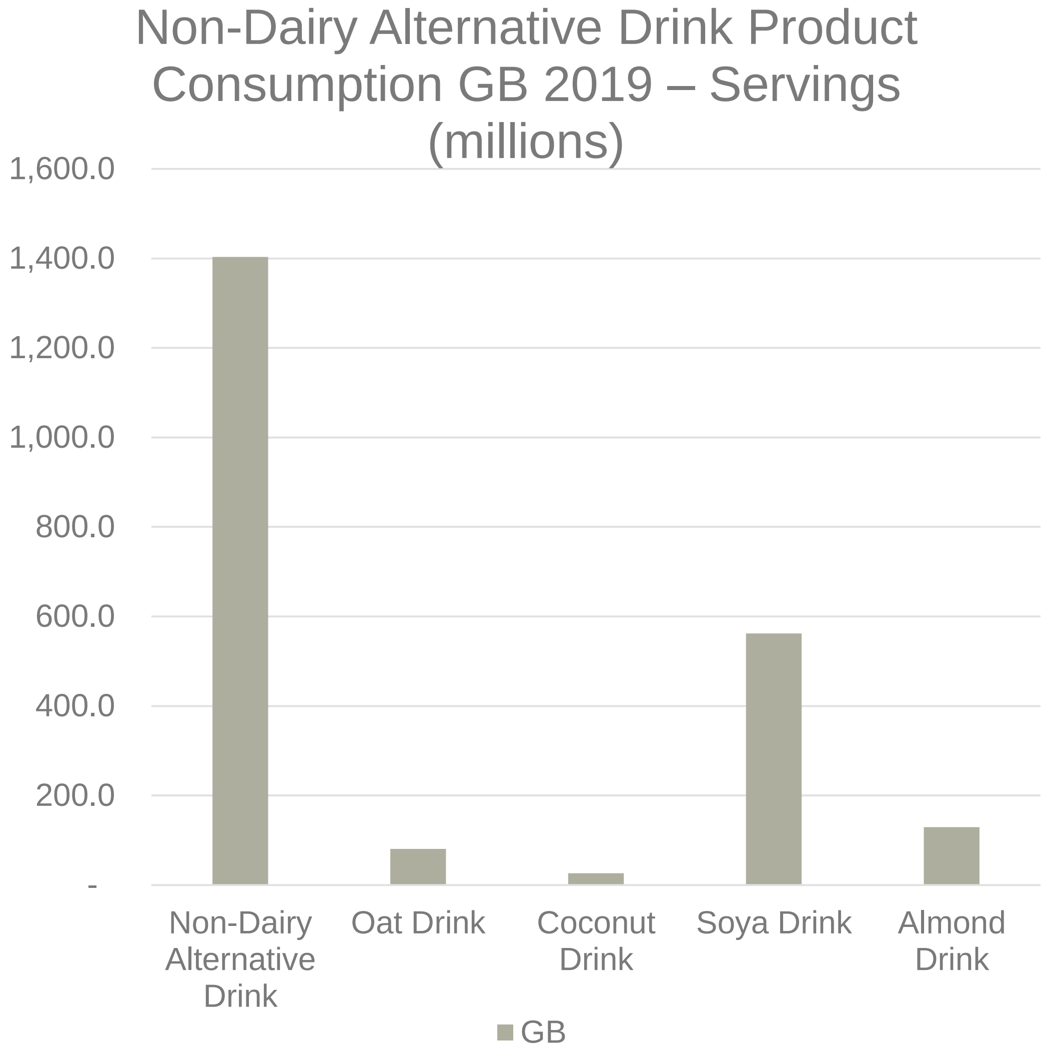


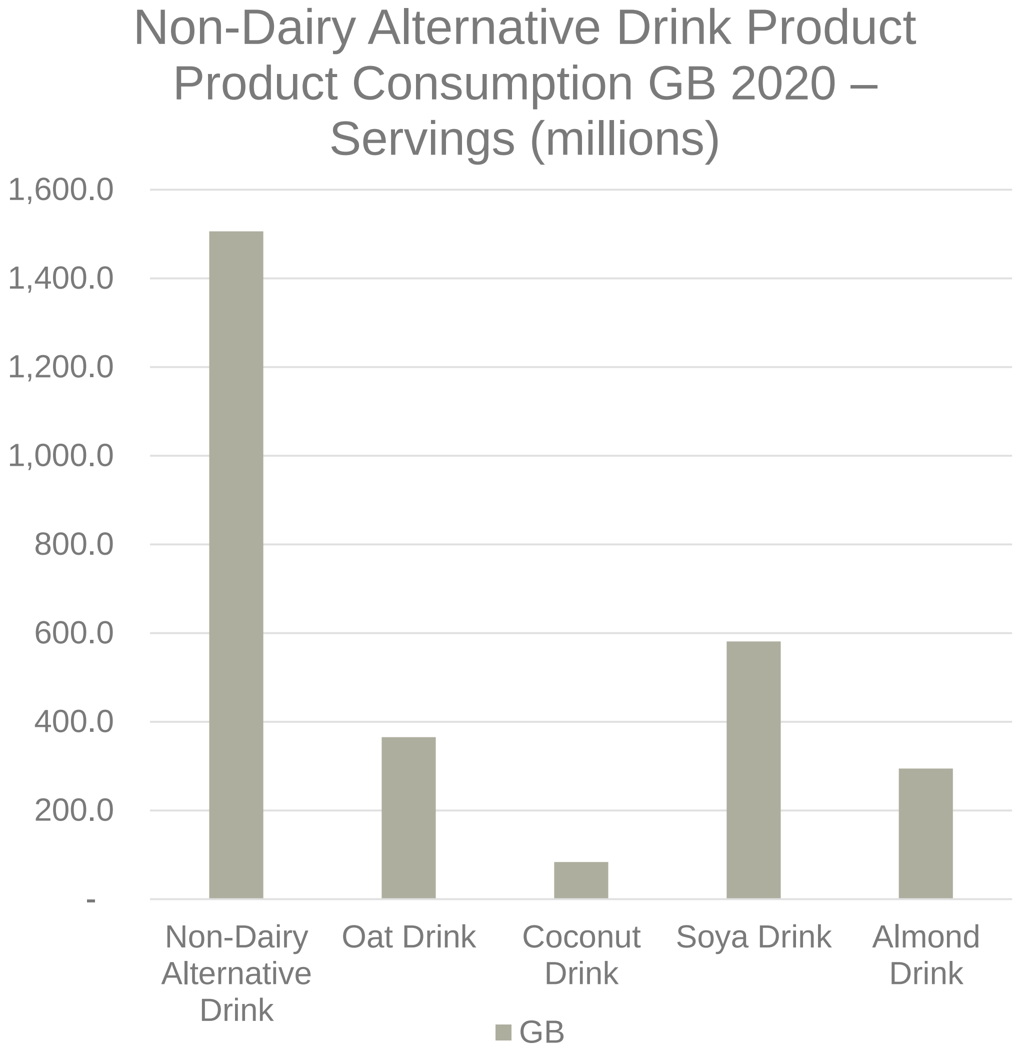
Oat Product Consumption – GB and Scotland 2019-2020





Non-Dairy Alternative Product Consumption – GB 2019-2020





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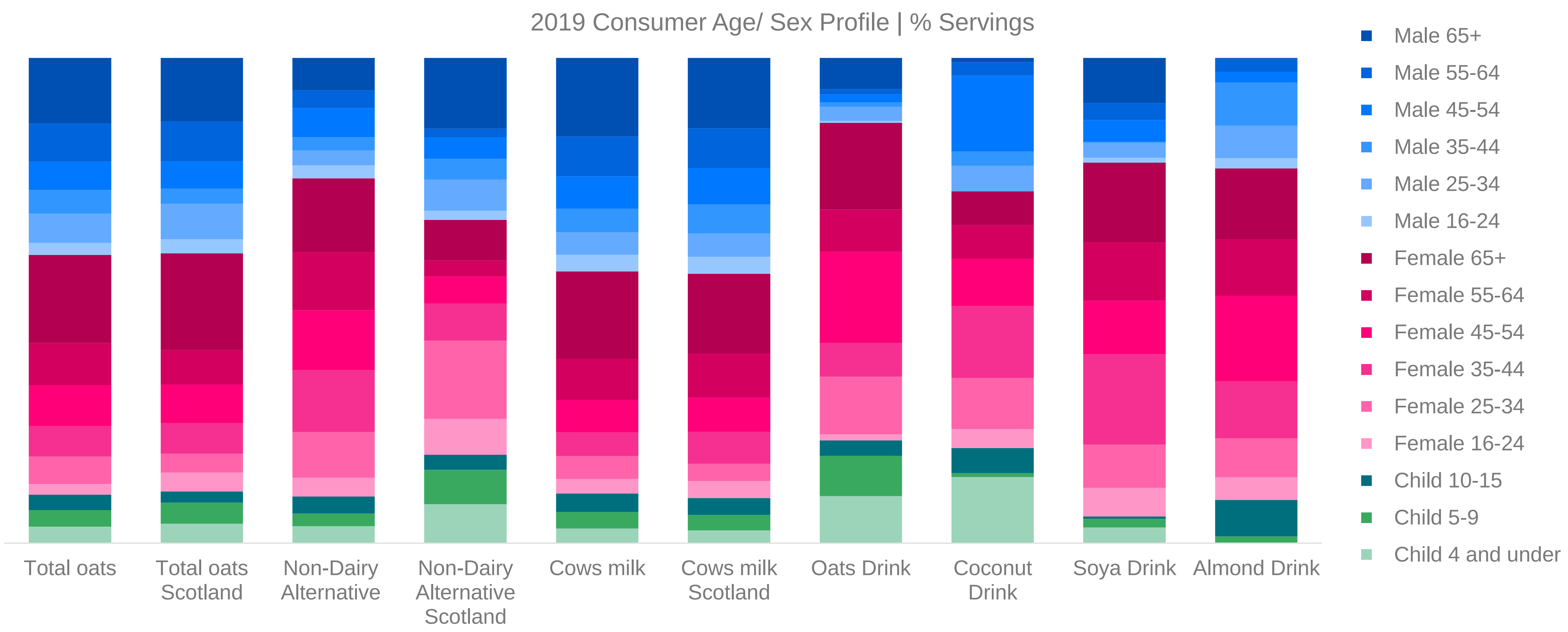
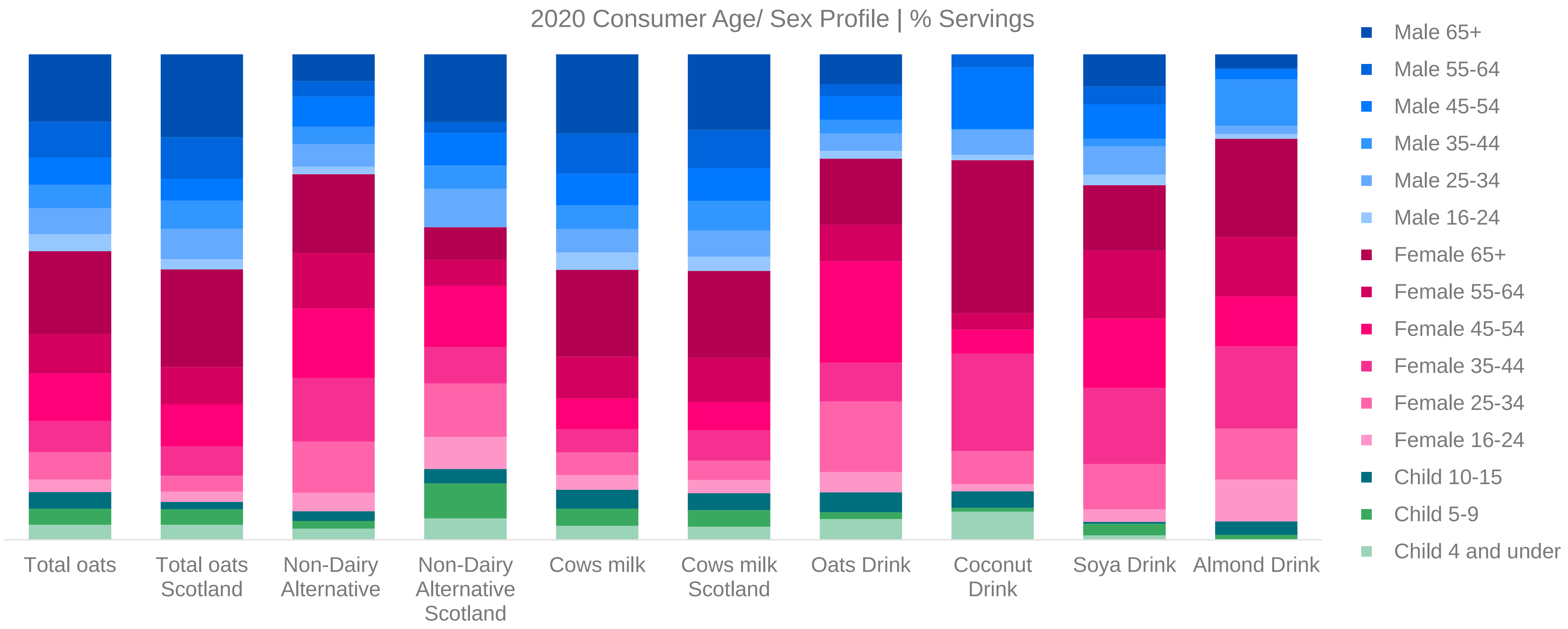
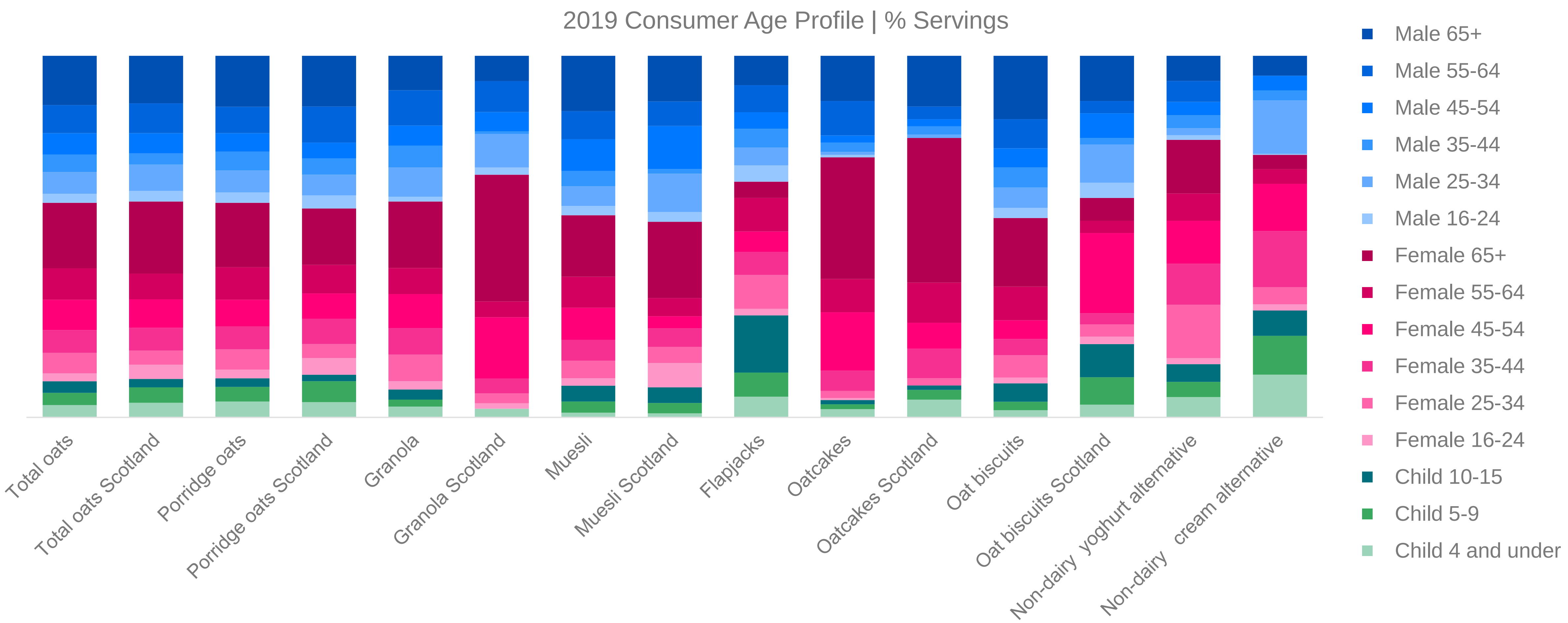

2019 Consumer Age/ Sex Profile | % Servings
Total oats
Total oats Scotland
Non-Dairy Alternative
Non-Dairy Alternative Scotland
Cows milk
Cows milk Scotland
Oats Drink
Coconut Drink
Soya Drink
Almond Drink
Male 65+
Male 55-64
Male 45-54
Male 35-44
Male 25-34
Male 16-24
Female 65+
Female 55-64
Female 45-54
Female 35-44
Female 25-34
Female 16-24
Child 10-15
Child 5-9
Child 4 and under

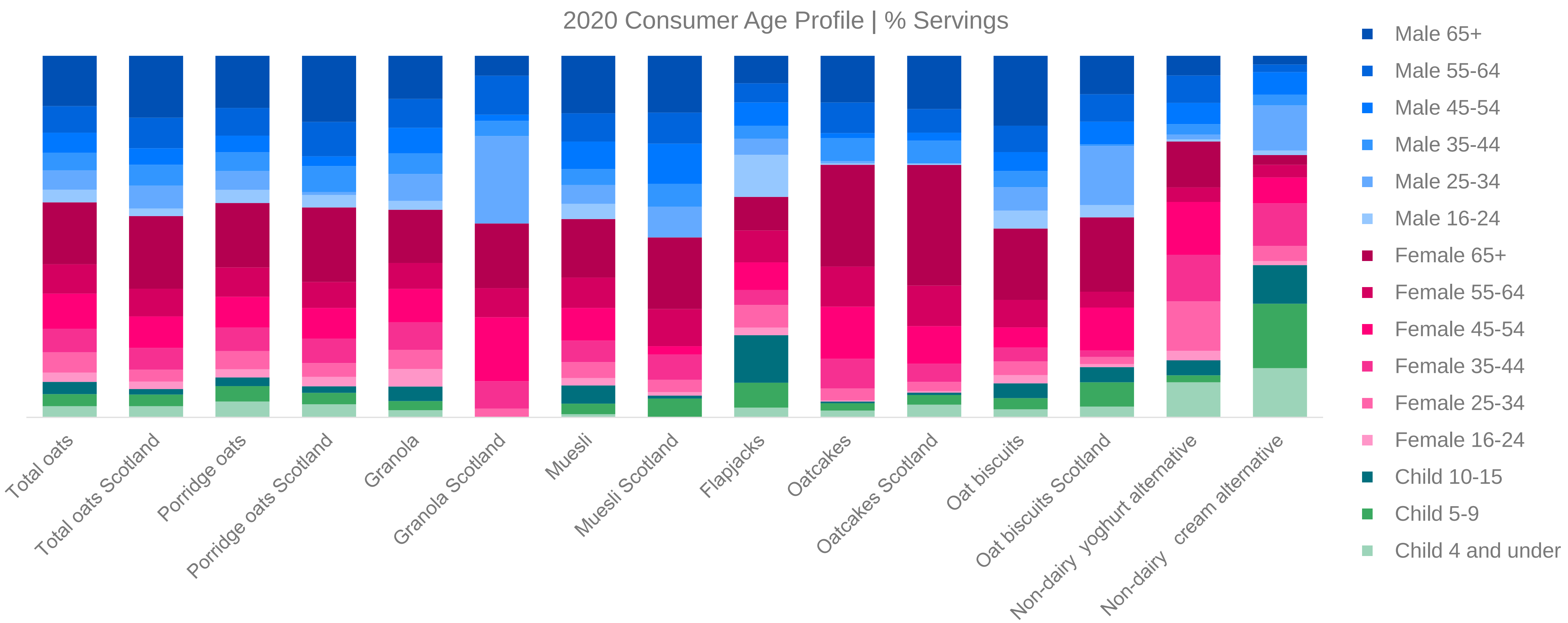


2020 Consumer Age/ Sex Profile | % Servings
Male 65+
Male 55-64
Male 45-54
Male 35-44
Male 25-34
Male 16-24
Female 65+
Female 55-64
Female 45-54
Female 35-44
Female 25-34
Female 16-24
Child 10-15
Child 5-9
Child 4 and under
Total oats
Total oats Scotland
Non-Dairy Alternative
Non-Dairy Alternative Scotland
Cows milk
Cows milk Scotland
Oats Drink
Coconut Drink
Soya Drink
Almond Drink



2019 Consumer Age Profile | % Servings
Total oats
Total oats Scotland
Porridge oats
Porridge oats Scotland
Granola
Granola Scotland
Muesli
Muesli Scotland
Flapjacks
Oatcakes
Oatcakes Scotland
Oat biscuits
Oat biscuits Scotland
Non-dairy yoghurt alternative
Non-dairy cream alternative
Male 65+
Male 55-64
Male 45-54
Male 35-44
Male 25-34
Male 16-24
Female 65+
Female 55-64
Female 45-54
Female 35-44
Female 25-34
Female 16-24
Child 10-15
Child 5-9
Child 4 and under

KANTAR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