



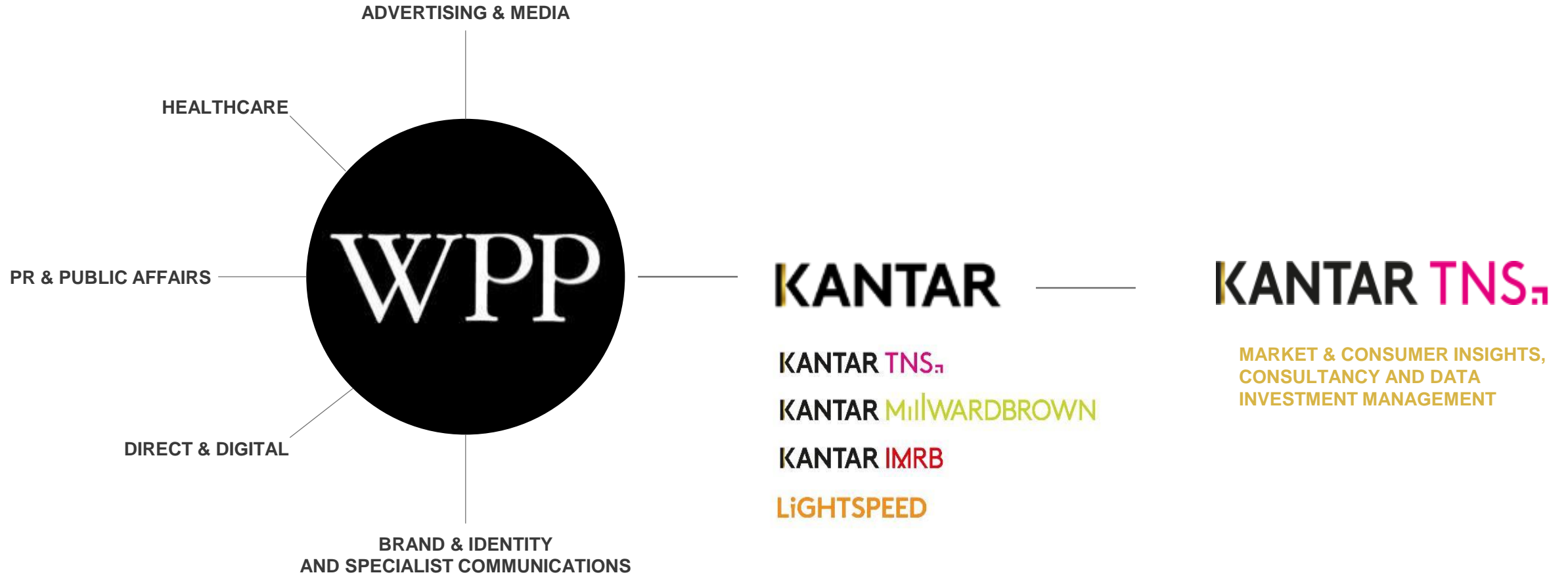
Are we loosing the young generation?

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Thailand
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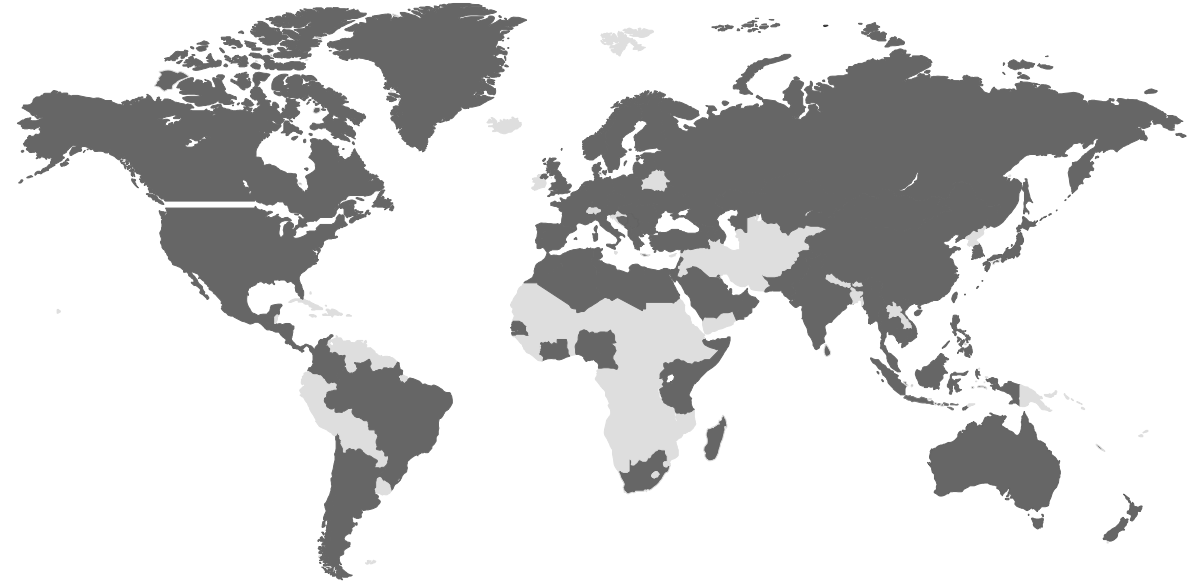
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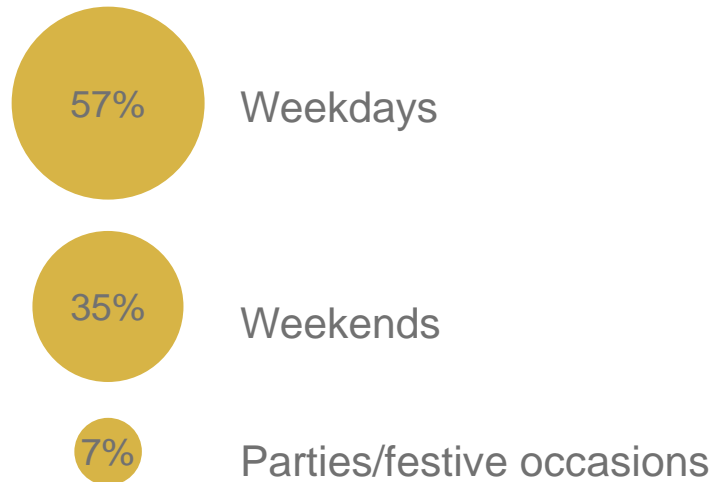
■ Countries with a Kantar TNS presence

Are we loosing the young generation?



Bacalhau facts in Portugal

People are usually eating Bacalhau at



9 of 10 are eating bacalhau at home at least once a year



5 of 10 are eating bacalhau out of home at least once a year



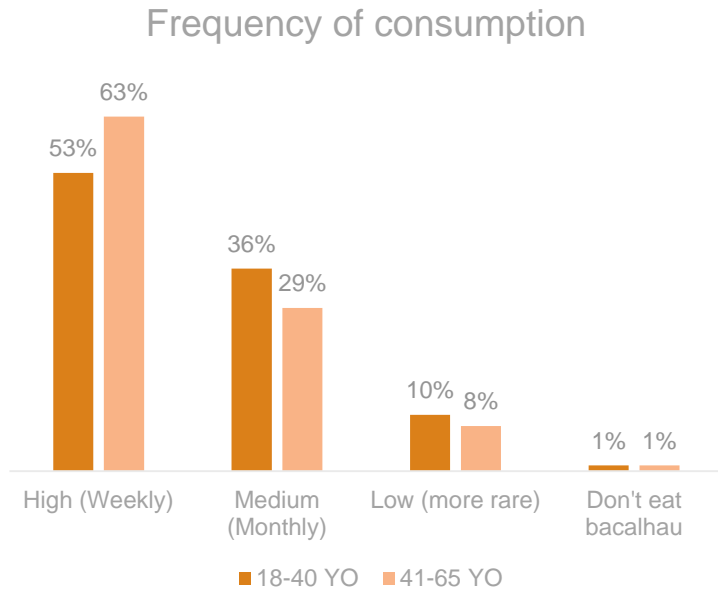
I buy bacalhau impulsively to everyday meals while the bacalhau to holiday meals like Christmas is more planned. I guess that bacalhau is an everyday meal, but still a special treat somehow.

- 40 YO male consumer, Porto

The younger generation is within a negative trend.

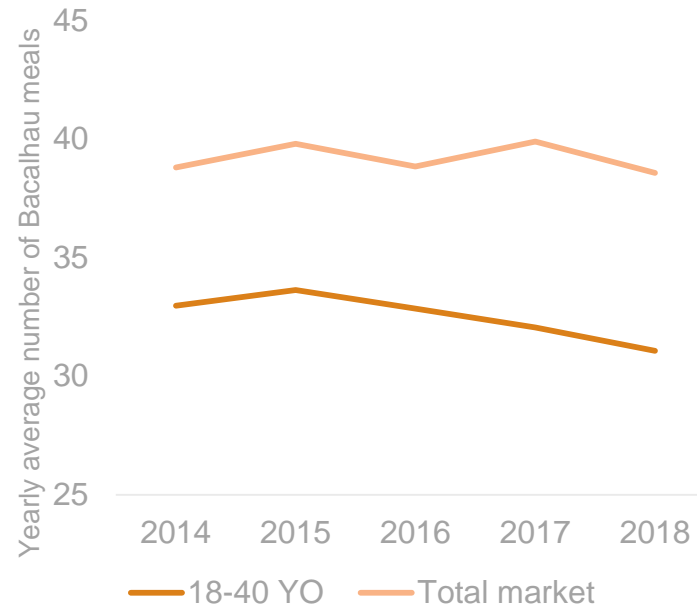
Young persons do not eat Bacalhau as often as older persons

- NSC/Kantar TNS (2018)



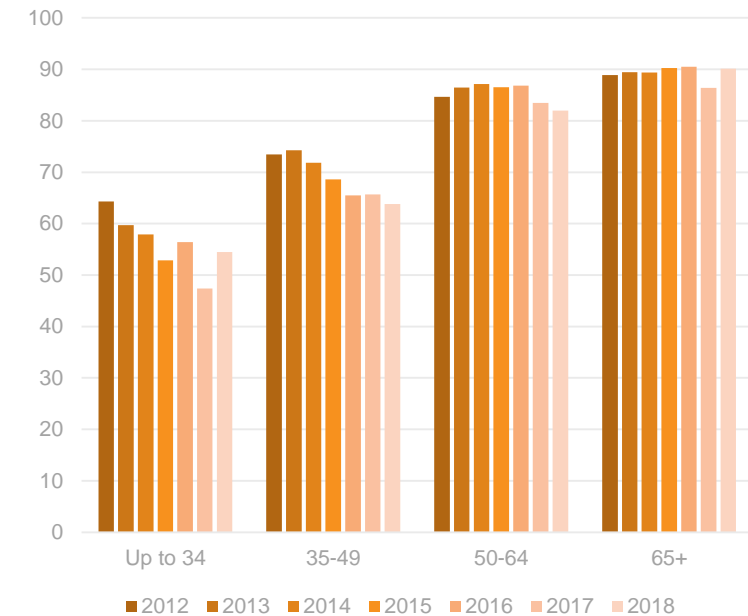
Fewer number of meals among the younger Bacalhau consumers

- SCI (NSC/Kantar TNS)



Fewer households under 49 buy Bacalhau for their homeconsumption

- Kantar Worldpanel

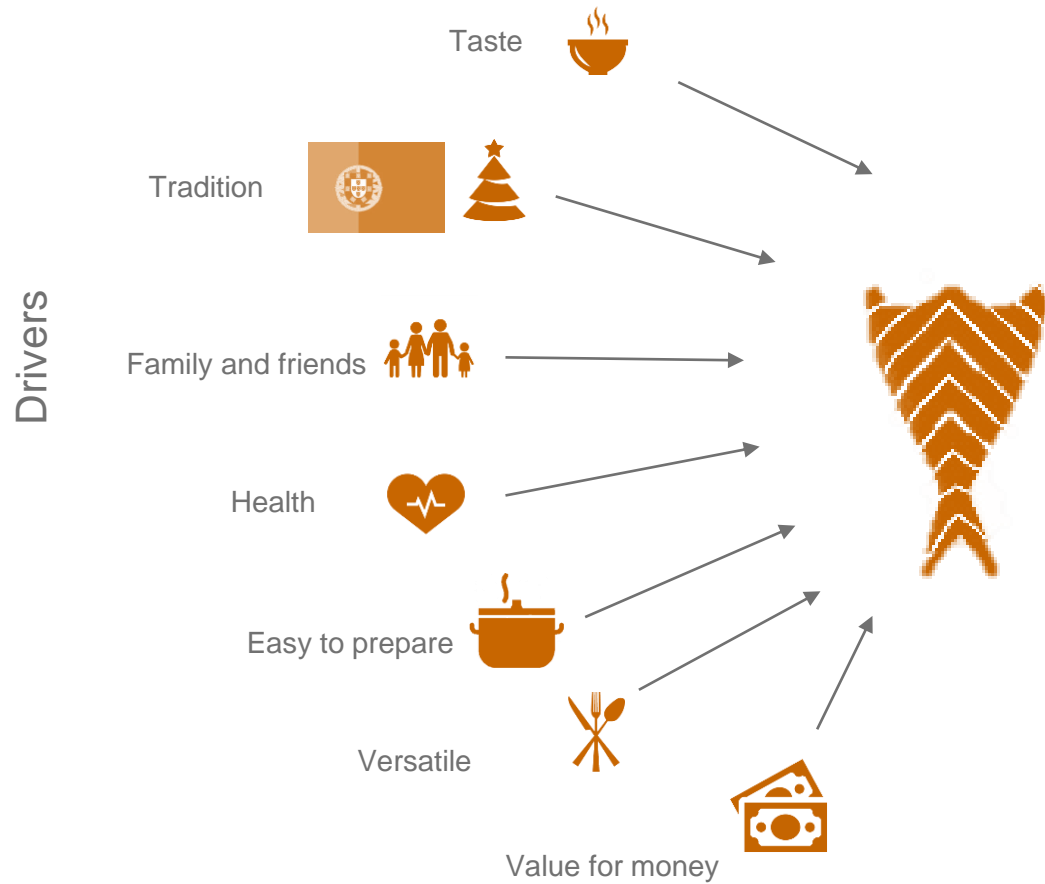


“I don’t like fish because of
the flavor, but I like
Bacalhau”

- 39 YO male, low usage of Bacalhau,
Lisboa



Drivers

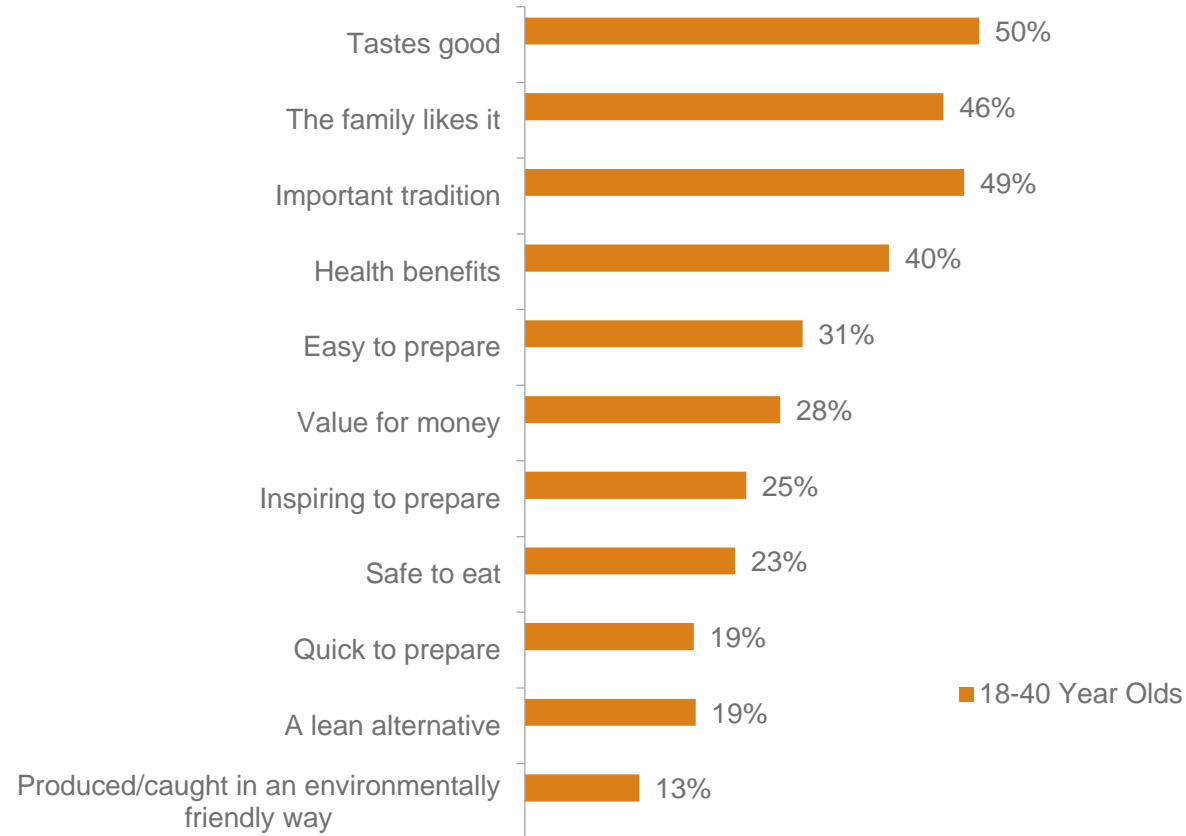


Many and strong drivers for Bacalhau

“Bacalhau unites people”

- Male 40, Porto

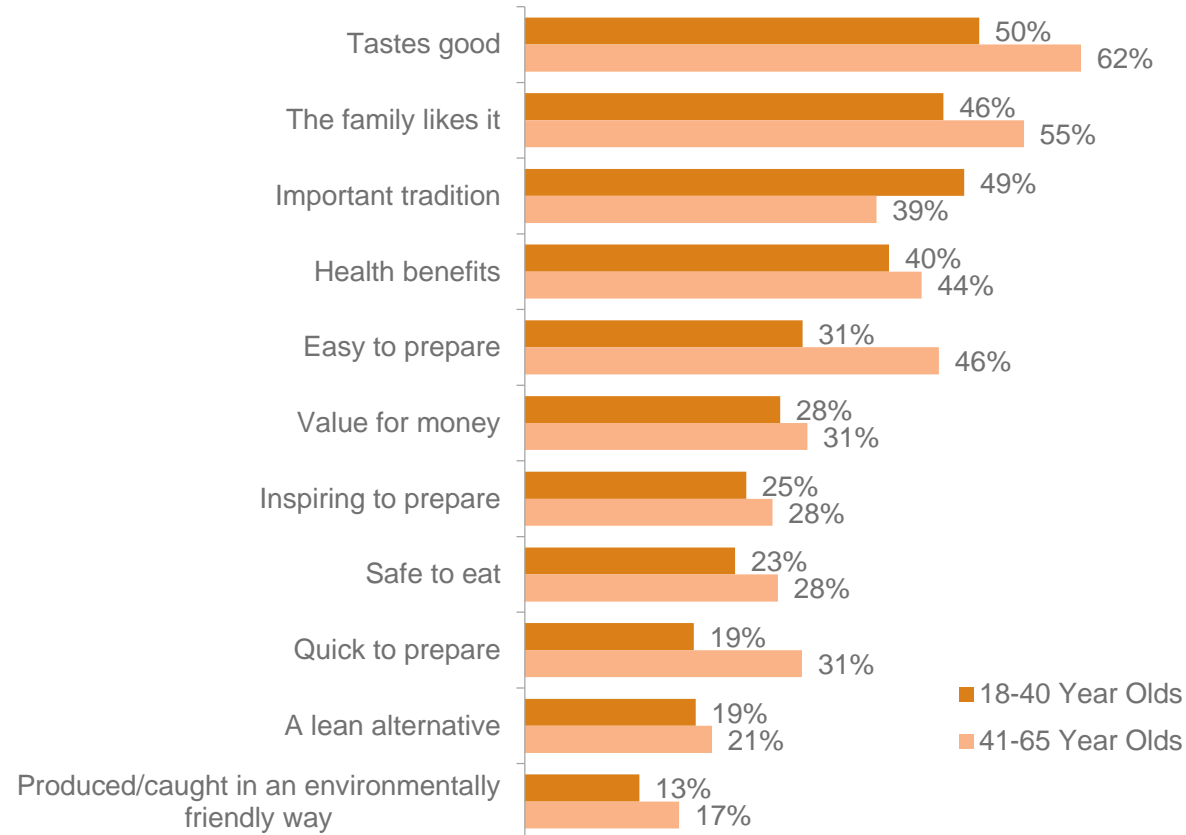
Reasons to buy Bacalhau



Young

- Taste
- Tradition
- Family likes it
- Health
- Easy to prepare

Reasons to buy Bacalhau



Young

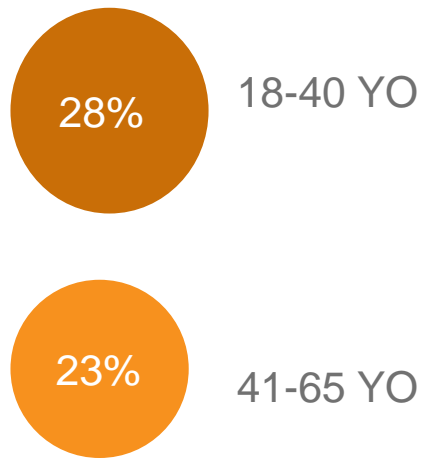
- Taste
- Tradition
- Family likes it
- Health
- Easy to prepare

Old

- Taste
- Family likes it
- Easy prepare
- Health
- Value for money
- Tradition
- Quick to prepare

More young than old consumers says they eat less bacalhau today than they did a year ago

Percentage of people who says they are eating less than they did a year ago



Value for money



Uncertainty when it comes to

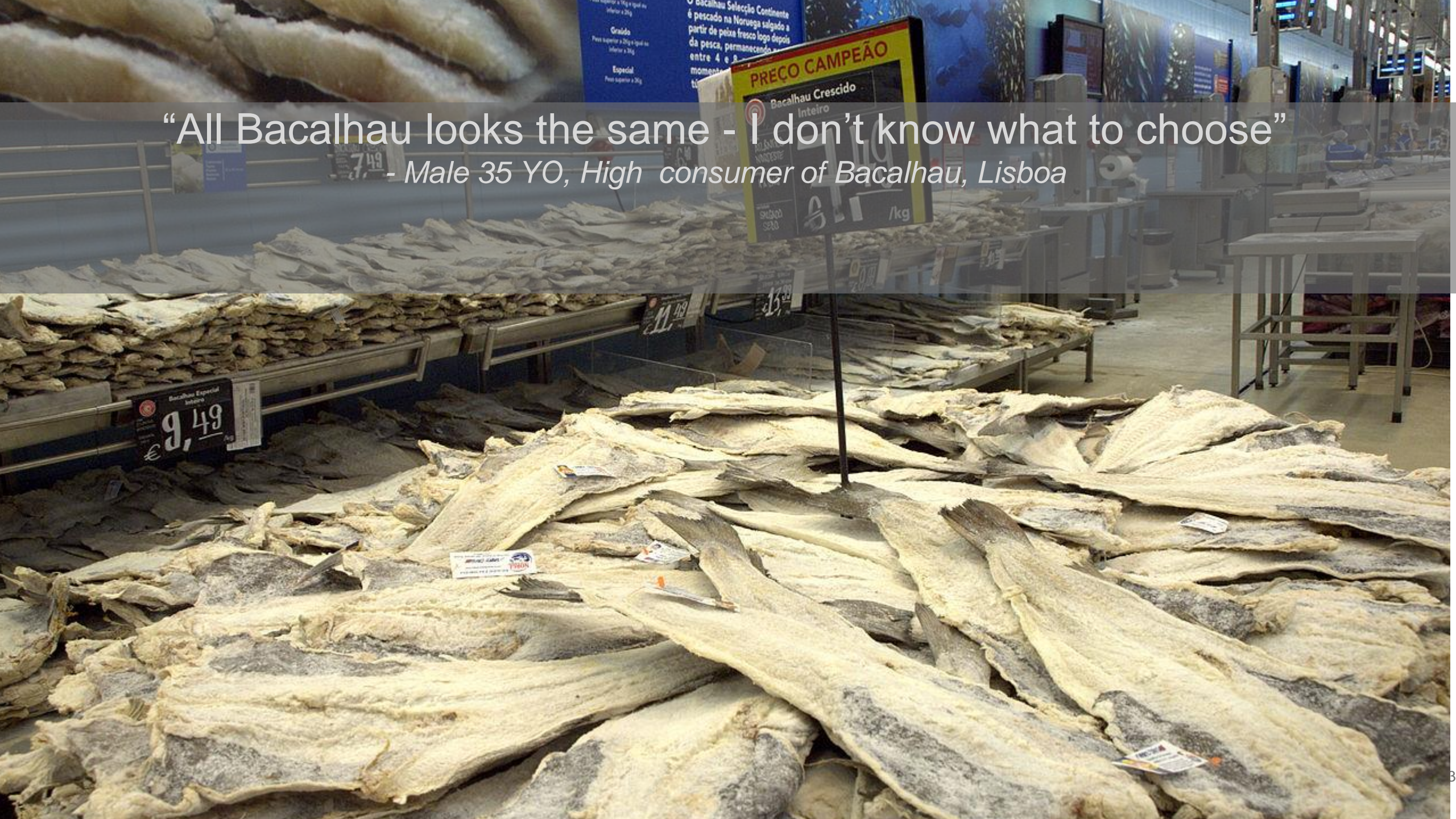
- * Choosing the product
- * Preparation
- * Dishes



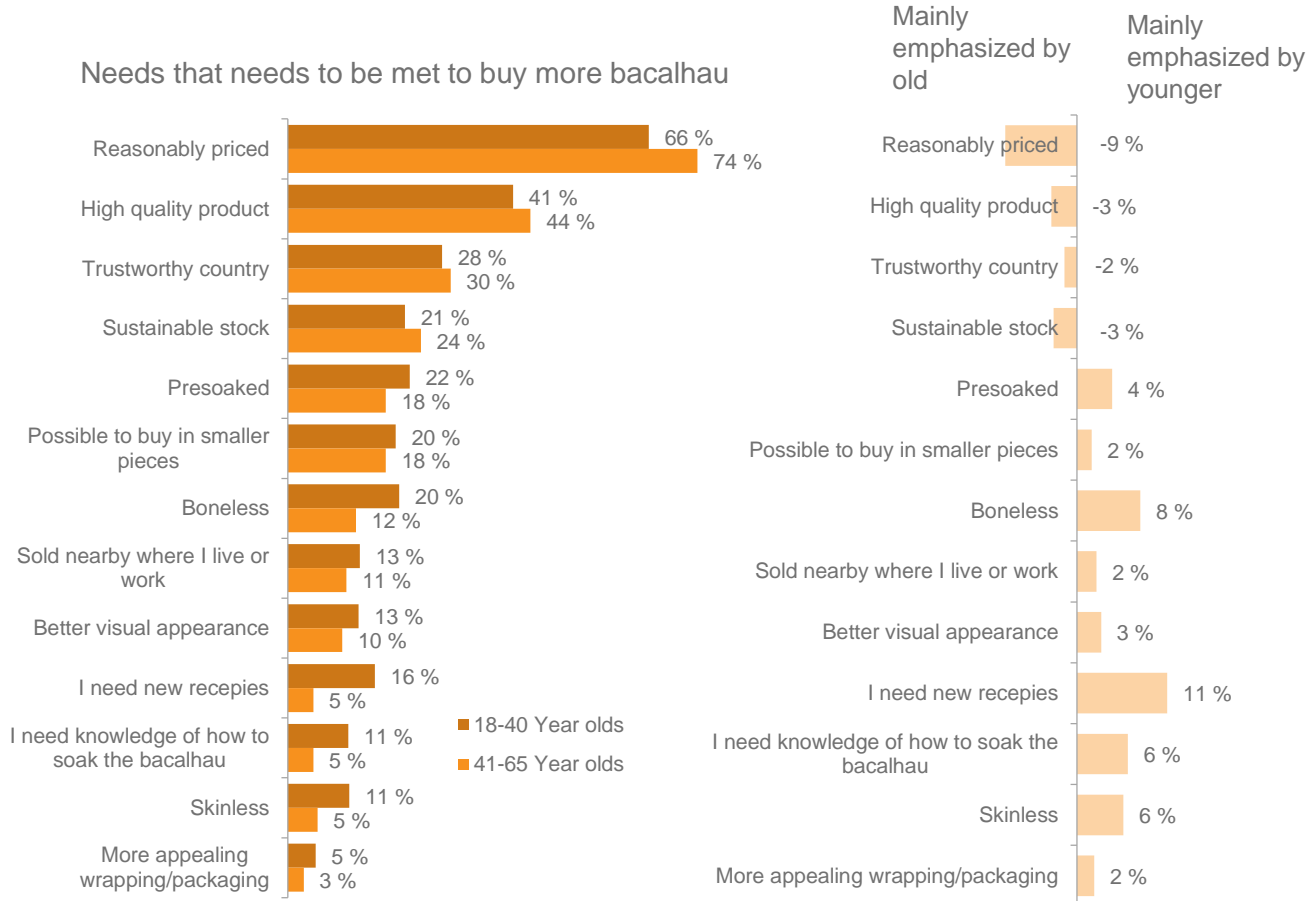
Time

“All Bacalhau looks the same - I don't know what to choose”

- Male 35 YO, High consumer of Bacalhau, Lisboa



The young generation needs help to reduce uncertainty with choosing and preparing the product.



While the older are emphasizing price more than the younger, younger needs help to solve challenges with the product.

Drivers

Barriers



Barriers

Coping strategies



Value for money



Uncertainty when it comes to

- * Choosing the product
- * Preparation
- * Dishes



Time



Trading down

- * Promotion
- * Cheaper products



Mom or Grandma



Pieces, chunks and shredded



Frozen products and brands



Cut it in the store



Exit strategy

Are we loosing the young generation?

