Brand Landscape 2027

Trust and Value

A Hartman Group syndicated research study

Fielding September/October 2026
U.S. market coverage

The rules of brand building have changed. Do you know what's driving consumer choice today?

The industry is approaching an inflection point.

Today's food and beverage marketplace is characterized by:

- Price sensitivity driven by inflation
- Consumer skepticism toward marketing claims
- Growing demand for transparency and authenticity
- Rapid changes in shopping behavior across retail and digital channels

Store brands have become a more consequential part of the competitive landscape, reshaping consumer expectations for what brands must deliver.

Brands competing primarily through awareness, advertising and price promotion risk falling behind those that deliver demonstrable standards, consumer trust and authentic value.

Brand Landscape 2027: Trust and Value reveals how consumers navigate an increasingly complex marketplace, identifying the factors shaping trust, loyalty and brand choice across national, store and emerging brands.

This study is for:

- National CPG brands seeking to defend relevance, differentiate and accelerate growth
- Retailers and store brands looking to strengthen trust, increase consideration and expand share

***Brand Landscape 2027* is your strategic advantage:**

- A consumer-centric view of what brands mean today
- Actionable insights with tailored implications for competitive strategy

If you are a....

Competing against a....	National Brand	Store Brand
National Brand	National v. National	Store v. National
Store Brand	National v. Store	Store v. Store

Uncover what makes a brand matter today—and how relevance translates into trust, value and loyalty

Robust quantitative and ethnographic research—contextualized by cultural perspective—will address key questions brands must answer to understand what has shifted, what endures and what's next.

For example...

The meaning of brand today

- Is brand importance rising or fading?
- Do consumers still see brands as reflections of who they are, what they value and how they want to be seen?
- What makes a brand feel distinctive, relevant or worth seeking out?
- How do consumers symbolically and objectively differentiate between brands? Small and large? National and store?

Consumer trust and value creation

- What attributes build trust, loyalty and "stickiness" when consumers have more choices than ever?
- What drives consumers to stay, switch, forgive or walk away from a brand?
- How can brands create meaning, preference and loyalty in categories where products are increasingly seen as commodities?

The changing competitive landscape*

- How are shifting expectations of trust, transparency and value reshaping national versus store brand competition?
- In which categories and contexts are brands still perceived as meaningfully different, and where are they becoming interchangeable?
- Where will brands create value and earn trust and loyalty next?

**Coverage spans national, regional and emerging brands*

The study moves beyond traditional measures of brand health to identify the emerging drivers of brand success and the strategies brands need to compete in today's marketplace.

Move from insight to action with category and brand level insights

By capturing consumer attitudes and usage across a range of private brands and key pace-setter categories, the study will reveal foundational insight into emerging expectations, shifting behaviors and new opportunities for brands to remain relevant and competitive.

6 PACESETTER CATEGORIES INCLUDED

Pacesetters will provide representation across the store (e.g., fresh vs. frozen vs. shelf stable; different combinations of attributes such as taste, health benefits, convenience, flavors, occasions or cost).

- Bottled water
- Yogurt
- Cold cereal/granola
- Frozen entrees
- Canned vegetables
- Condiments and dressings

AREAS OF INQUIRY FOR EACH CATEGORY

- P3M purchase of category (including by brand type and specific store brands)
- Perceptions of premium, quality and value
- Drivers of brand choice and loyalty
- Motivators and barriers to brand trial and switching

STORE BRANDS INCLUDED

**Reporting pending sample size*

- Great Value, bettergoods (Walmart)
- Market Pantry, Good & Gather (Target)
- Kirkland Signature (Costco)
- 365 (Whole Foods Market)
- Kroger, simple truth (Kroger)
- Signature Select, O Organics (Albertsons)
- Trader Joe's
- Friendly Farms, Burman, Clancy's (ALDI)

AREAS OF INQUIRY FOR EACH BRAND

Will be asked for each store brand above; can also be asked of proprietary brand(s)

- P3M purchase
- Brand perceptions (e.g., expertise, premium, quality, reliability, value, identity and "badge value")
- Loyalty, credibility and differentiation
- Substitution/switching risk

Contact us about including your categories and/or brands for proprietary insight.

Gain robust consumer insights with actionable guidance—without the financial or time investments of custom research

Robust integrated methodology

Quantitative research: Nationally representative online survey of U.S. food shoppers aged 18-80, with a minimum total sample of n=2,000 and readable samples across key demographic groups, including generation, race/ethnicity and income.

Qualitative research: Multi-day engagement with demographically and regionally diverse consumers using journaling, prompts, photos and video, supplemented by in-depth virtual interviews.

Cultural analysis: Review of marketing, consumer publications and food and beverage discourse; engagement with cultural informants; social listening across key consumer platforms.

Final report publishes January 11, 2027

Pre-publication price: $12,500* (through 12/31/2026)
Standard price: $15,000* (beginning 1/1/2027)

***report is included in all Hartman Retainer Services packages*

An **in-depth PowerPoint** report will provide comprehensive analysis supported by charts, consumer quotes and visuals, along with strategic implications and recommendations.

A standalone **Executive Report** (included with purchase) will provide a concise, strategic summary of the full report for internal stakeholders.

Detailed **Excel data tables** will accompany the report, enabling flexible analysis with key demographic breakdowns.

Opportunities are available to incorporate proprietary categories, questions and/or custom data cuts, subject to feasibility. Requests are handled on a first-come, first-served basis. Contact us by 9/11/2026 for a quote and feasibility assessment.

Turning insights into action: Activation Sessions

Contact Melissa Abbott to learn how an Activation Session can translate *Brand Landscape 2027* findings into personalized implications and priorities for your brands, categories and competitive strategy: melissa@hartman-group.com.

Pre-order the ***Brand Landscape 2027*** report now

To purchase, please email: **melissa@hartman-group.com**

Melissa Abbott
VP Syndicated Studies
O: 425.452.0818

Hartman GROUP

ABOUT HARTMAN GROUP

Our mission is to translate consumer behavior and food culture into strategic growth opportunities for our clients. Since 1989, Hartman Group's anthropologists, social scientists and business analysts have been immersed in the study of American food and beverage culture, using ethnographic observation, quantitative tracking surveys and deeply studying trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, identifying unique opportunities and winning strategies for our clients.

3150 Richards Road, Ste. 200 Bellevue, WA 98005
Tel (425) 452 0818
www.hartman-group.com