BRAND AMBITION:
FOOD AND BEVERAGE PRIVATE BRANDS & BEYOND

IN-DEPTH ANALYSIS AND ROBUST INSIGHTS BACKED BY A RANGE OF DATA ON THE CULTURAL PHENOMENOM OF **NAME BRANDS VS. PRIVATE BRANDS**

JUNE 2021

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What opportunities are there for brands to build more informed kinds of loyalty in today's consumer-driven marketplace?

Brands have traditionally been a powerful ***system of influence*** *in consumer food culture.*

For many decades, food and beverage companies have invested significant resources in building their brands, carefully crafting an image they sought to project onto target consumer groups. Such efforts resulted in offering consumers a broad selection of unique products that span established national brands, popular local choices, creative emerging brands … and more recently retailers' own private brands.

Category and Brand-based Insights

In order to provide a view of how main name brand and private brand themes play out at the category level, eight categories were chosen as representative of a range of store departments, desired attributes, and eating needs

The Hartman Group's ***Brand Ambition: Food and Beverage Private Brands & Beyond*** report examines how trends in the American cultural landscape have affected the role brands play in consumers' food lives today and provides future-looking guidance in several areas of possibilities: pricing, attributes, innovation, and operating in today's online environment.

The study then takes a deeper dive into the world of private brands: the role they play in consumers' grocery repertoires, comparisons to name brands across a range of purchase criteria, perceptions of value vs. premium/organic/better-for-you private brands, and the flow of mutual benefit between retailers and their private brands. A spotlight on several categories offers insights relevant to other categories sharing similar characteristics.

STUDY BACKGROUND

The Hartman Group has provided deep insights into brands and private label brands at key points for the past two decades, exploring the advent and changing nature of store brands and their relationship with national and other brands.

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METHODOLOGY

The findings in this study are based on an integrated methodology combining qualitative ethnography and a quantitative online survey. Quantitative: An online survey fielded May 2021 of 2,205 U.S. primary shoppers aged 18-75. Readable samples of standard demographics (e.g., gender, generational cohorts, children in household). Qualitative: One-week engagement (journaling, special prompts, photos, and videos) with participants across the U.S. using an online qualitative research platform, paired with in-depth, follow-up virtual interviews with a subset of participants.

REPORT INCLUDES

- The report (PowerPoint and PDF format) includes executive summary, robust insights and implications, and a complete analysis of relevant data supported by full-color charts and visuals.
- A supplemental set of data tables (Excel format) with a breakdown of key demographics will accompany the report.

REPORT OVERVIEW

Executive Summary

Opportunities for the role that brands can play have evolved along with American culture, opening up the way for brands to build more informed kinds of loyalty.

Chapter 1. What Is a Brand in 2021?

Brands exist within a set of macro and micro cultural forces that interplay and affect consumer choices. Within this cultural system, the U.S. food industry has used brands to tell consumers what attributes (taste, quality, consistency) they could expect from their products. Post-WWII expansion and growth in the U.S. economy, population, and the reach of mass media set the stage for a new era in the American food and beverage marketplace. Spurred by the unprecedented opportunity to win consumers' attention and spending, manufacturers invested heavily in brands. In turn, **the U.S. food landscape became the birthplace and showcase for iconic food and beverage brands in a way that was distinctively American.**

- Sociocultural trends, systems of influence, cultural values, needs and contexts, food behaviors and habits
- Brands gain symbolic power
- Main drivers of the changing role of brands
- The shifting role that brands play
- Product selection drivers
- Scrutiny of brand by various consumer groups
- Higher vs. lower importance of reliance on brand
- The paradox of choice facing consumers
- What best communicates the essence of a brand
- Food and beverage brand choices as a reflection of self
- Willingness to try new brands
- New brand trial motivators
- Trust in the quality and consistency of a brand’s products
- Brand as an indicator of quality

Chapter 2. What Is the Role of Private Brands?

Over the last several decades, food and beverage retailers have evolved their own offerings from private “label” to private “brands” in their own right.

- Change in private brands share of sales
- Structure of the world of private brands has grown increasingly complex
- Shopper ability to recognize stores’ own brands
- Private brands vs. name brands: equally as good as name brands, better than name brands, name brands do a better job

- Rating the "value" of a product
- Consumer understanding of delivering a "good value"
- Perceptions of name brands vs. private brands
- Traditional name brand strengths
- Areas of strength or parity for private brands
- Satisfaction with name brands vs. private brands and private brand tiers
- Personality perception of name brands vs. private brands
- Openness to new brand trial based on current experience
- When shopping, the importance of having a specific brand
- Store selection criteria
- Exploring the relationship between private brand and the retailer

Chapter 3. How Does Category Affect Brand Choices?

Consumers' perceptions and expectations of brands (and specifically private brands) and their willingness to try new ones differ across "types" of categories.

- Reasons to buy a specific brand within category
- Willingness to try new brands
- New brand trial motivators
- Satisfaction with name brands vs. private brands
- Premium, quality, and value perceptions of name brands vs. private brands
- Reasons to buy for 20%+ of name or private brand buyers
- Willingness to try private brands by category
- Private brand trial barriers
- New private brand trial motivators
- Category dashboards: Canned/pouched/jarred/Tetra Pak foods, snacks, frozen meals, appetizers and snacks, processed/cured meats, dairy yogurt, deli items/prepared foods, condiments/dressings, enhanced/sparkling/flavored water

Chapter 4. What's Next?

Given the cultural shift away from brand dependency, both private brands and name brands are subject to many of the same pressures and constraints.

- Expectations of post-pandemic purchasing of private brands
- Expectations of name brands
- Willingness to pay more for private brands
- How brands can differentiate
- Attribute spotlight: ingredient lists
- Innovation: perception of purchased brand as innovative, hopes for future products, categories where consumers would like private brands to innovate
- Online: approaches to searching for items online, consumer spotlight, online retailer spotlight

About The Hartman Group
Since 1989, The Hartman Group has been translating consumer behavior and food culture into strategic growth opportunities for our clients. We are 100 percent focused on the food and beverage marketplace and our clients' interests. We deliver smart, strategic, and tactical advice, engaging collaborative experiences, and comprehensive research and analysis that lead to positive outcomes for our clients.

For more information, visit www.hartman-group.com

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