
PRIVATE LABEL
VS
BRANDED
PL
BRAND
HOW TO AVOID A
KNOCKOUT BLOW
SHOPPER
UNPACKED
Shopper
Intelligence
Understand. Influence. Lead.

Martin Baptie

Shopper & Category Development Director

25+ Years FMCG Experience

78 Category Wins (12 K.O.)

20 Category Losses (2 K.O.)

Carlsberg Group
Warburtons
ABInBev
Samworth Brothers Quality Foods
Bulmers Estd 1887

Mike Ralls

Sales & Marketing Director

15 Years FMCG Experience

Euromonitor International
Kantar Consulting

Chris Adkins

Managing Director

20+ Years FMCG Experience

52 Category Wins (3 K.O.)

8 Category Losses

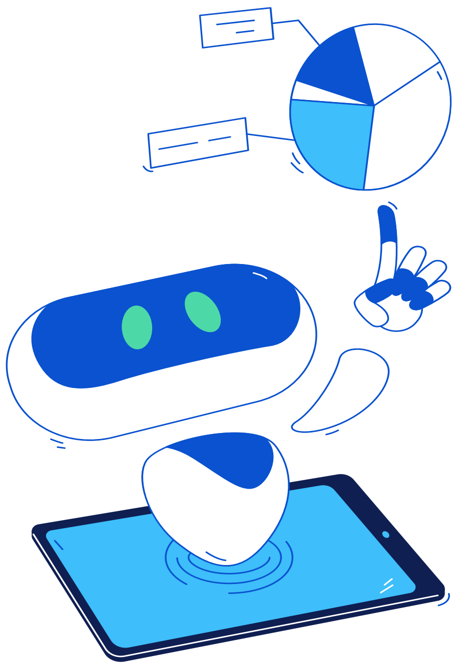
Kraft
Coca-Cola
Mars

INTRODUCING:

THE CATEGORY TREND ANALYSER

New from Shopper Intelligence

What's The Category Trend Analyser?



An innovative tool that analyzes the prevalence of key consumer goods trends and topics in social media and industry publications

How it Works:

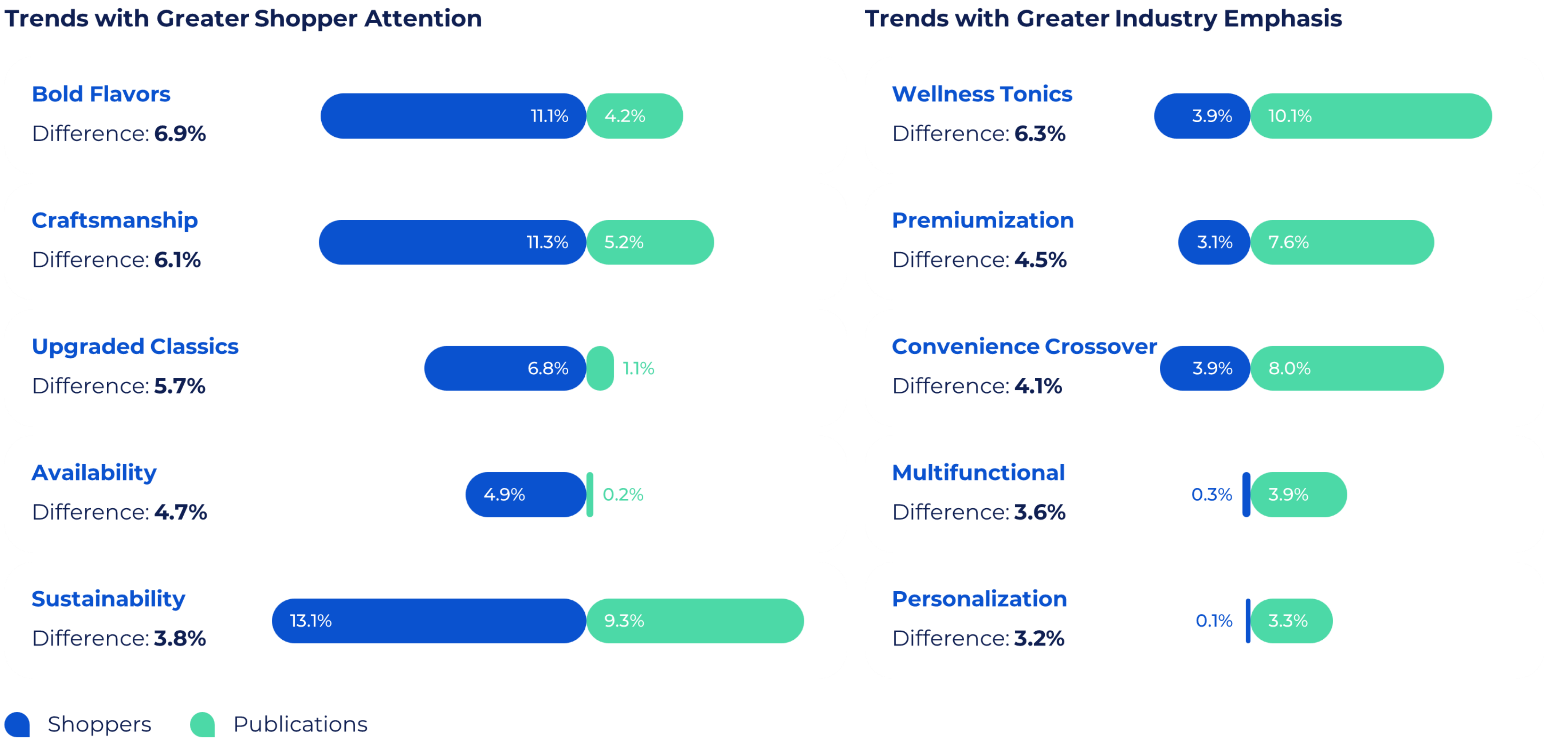
- % of mentions in web based public material
- Visualizes the top 10 trends

Dominant Trends in Key Categories – Q1 2024

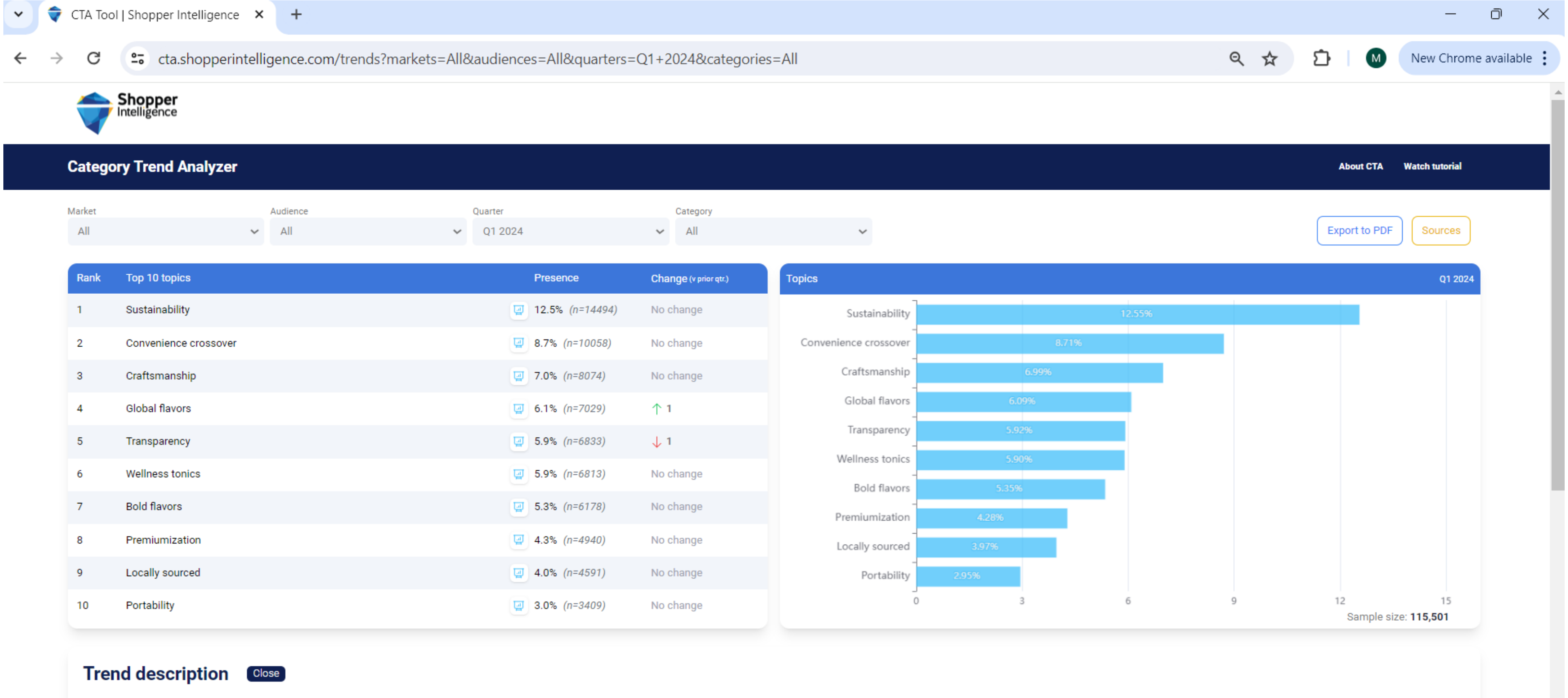
Shopper Intelligence

TOP TRENDS	#1 CATEGORY	#2 CATEGORY	#3 CATEGORY
Sustainability (11.9%)	Household **37.36%**	Frozen Food **27.32%**	Dairy **23.64%**
Craftsmanship (9.3%)	Beer wine and spirits **31.23%**	Bakery/bread **17.16%**	Fresh meat and fish **12.00%**
Bold flavors (8.8%)	Soft drinks **31.48%**	Snacking/Impulse **26.78%**	Bakery/bread **14.94%**
Transparency (6.3%)	Fresh meat and fish **23.01%**	Produce **19.79%**	Beer wine and spirits **17.26%**
Wellness tonics (5.9%)	Chilled/Deli **42.79%**	Frozen Food **24.80%**	Petcare **10.62%**
Global flavors (5.5%)	Dairy **26.43%**	Dry Grocery **16.18%**	Fresh meat and fish **11.22%**
Convenience crossover (5.2%)	Dry Grocery **37.27%**	Fresh meat and fish **31.75%**	Frozen Food **14.44%**
Upgraded classics (4.9%)	Beer wine and spirits **15.85%**	Snacking/Impulse **13.05%**	Health and Beauty **1.03%**
Premiumization (4.58%)	Petcare **12.86%**	Health and Beauty **12.35%**	Chilled/Deli **8.41%**
Locally sourced (3.85%)	Produce **35.83%**	Bakery/bread **16.25%**	Fresh meat and fish **3.91%**

Publications Vs Shoppers: Difference in Priorities



This is available FREE!...in 2024



NEXT:
The Main Event

Shopper Intelligence

Structure

- Round 1: define the shopper, are they different?
- Round 2: understand the role each plays for shoppers and the store
- Round 3: adapt strategy to maximise this for each

ROUND 1:
Define the shopper

Shopper Intelligence

The Branded shopper is typically younger..

Shopper Intelligence

% of shoppers Under 40 years old

..aside from the obvious (Baby categories), **BBQ, Hot & Chilli Sauces** is the highest-ranking category for this at 72%!

50%

Branded shopper

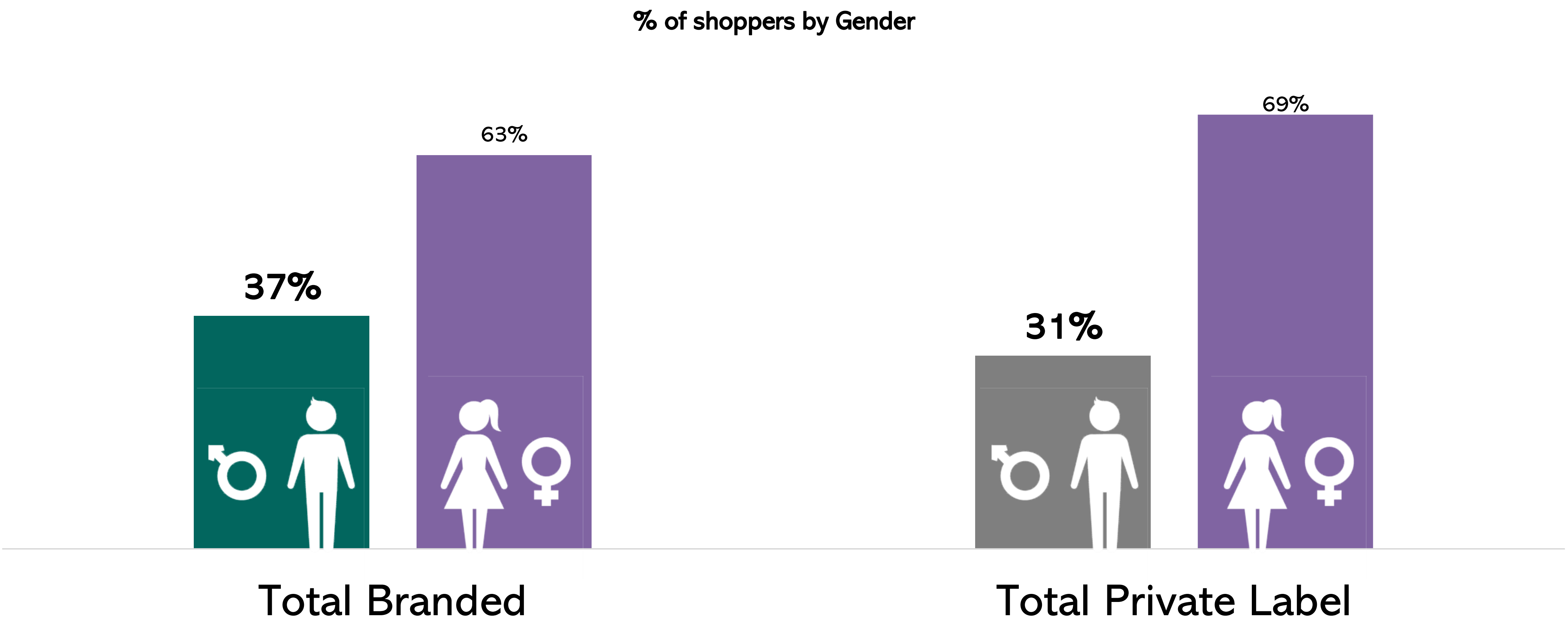
42%

Private Label shopper

Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

..and they are also significantly more likely to be Male

Shopper Intelligence



Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

When it comes to cost-of-living strategies, Brand shoppers are more inclined to buy promos

% of shoppers 'bought on promo'

38%
Branded shopper

22%
Private Label shopper

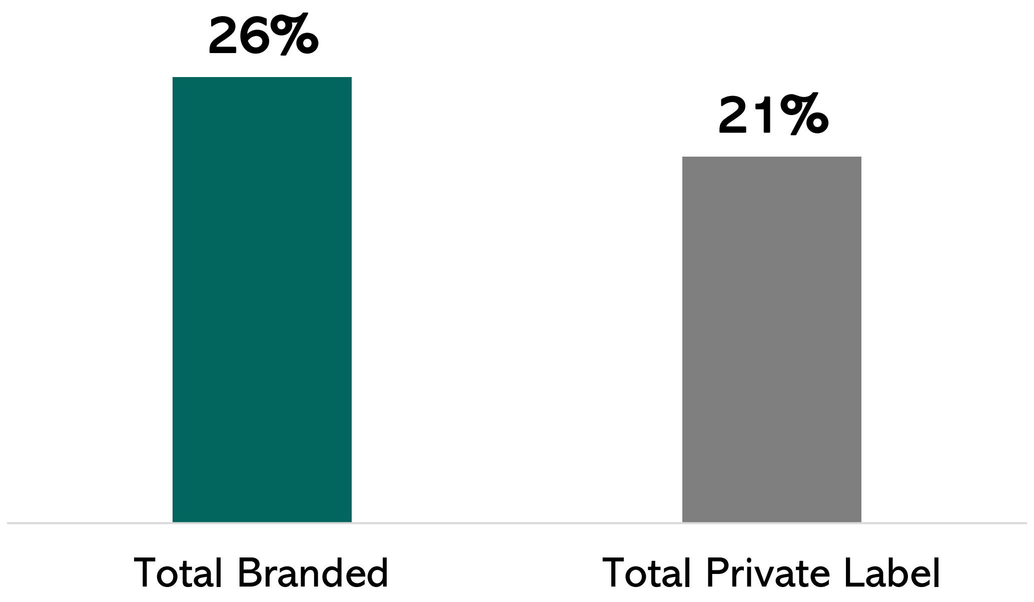
Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

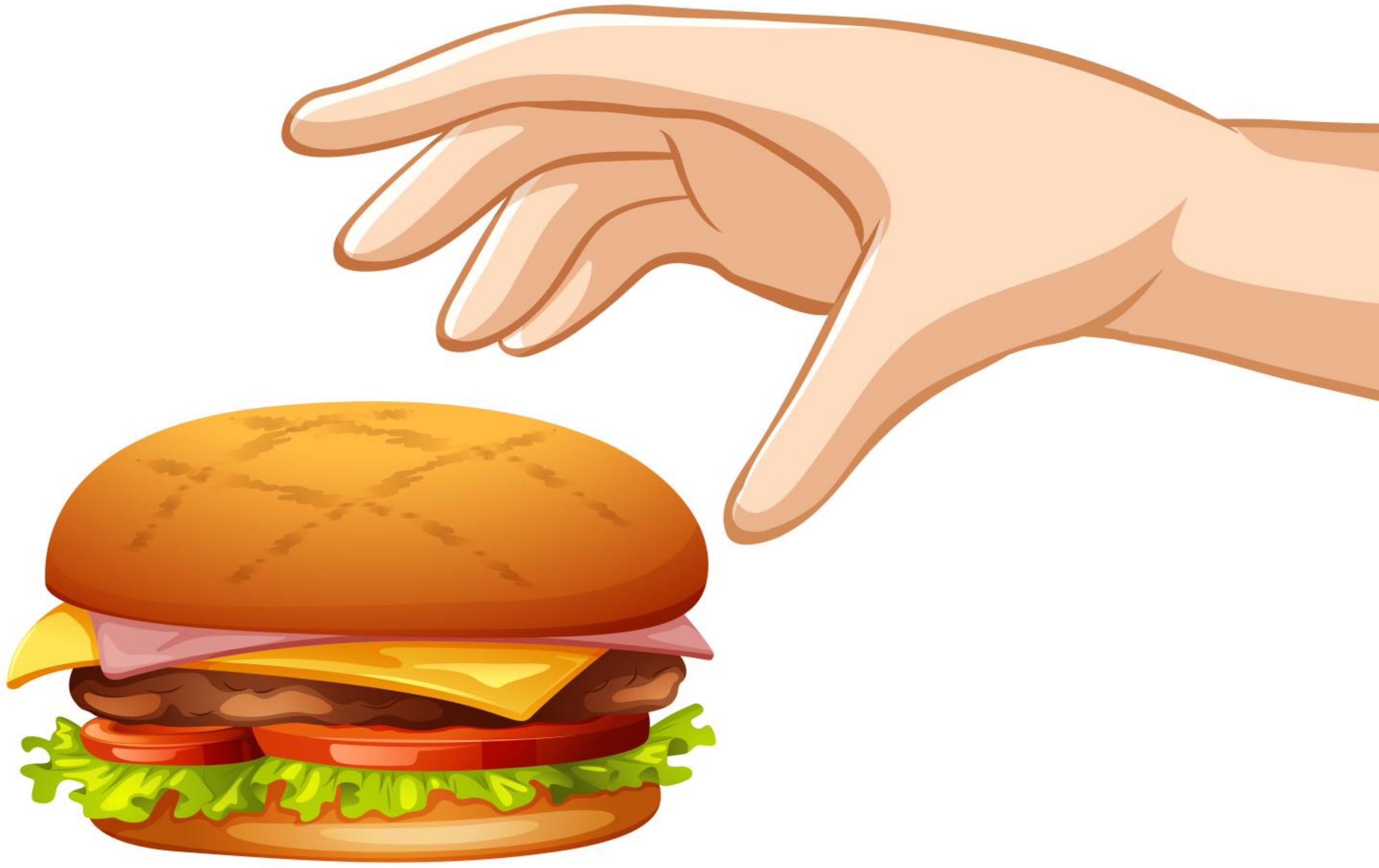
Top 10 categories..?

1) Boxed Chocolate and Twistwraps
2) Toiletries Gifting/Gift Packs
3) Plants and Gardening Tools
4) Spirits
5) Health and Wellbeing Drinks
6) Slimming/Weight Management
7) Stain Removers and Treatments
8) Fresh Lamb
9) Sparkling Wine
10) Toys

Branded shoppers typically plan less and as such are more likely to be influenced in store

% of shoppers UNPLANNED
(decided to buy once instore)



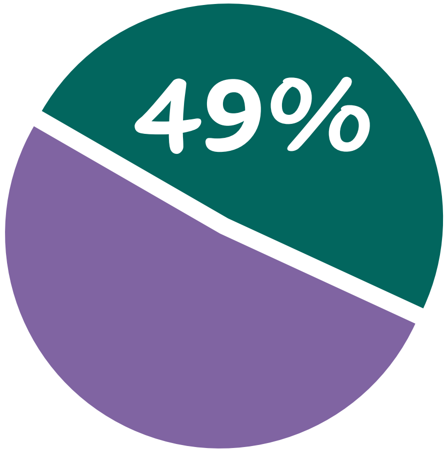


Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

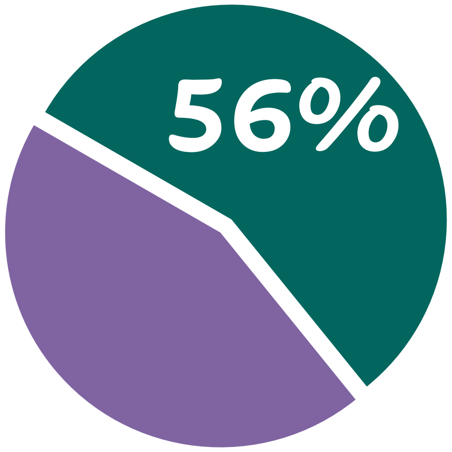
..but, they're also less loyal to one retailer

"I do most of my shopping of this kind at this Retailer"

% shoppers



Branded shopper



Private Label shopper

Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

..and more likely to walk away if they don't find their choice

% of shoppers 'walk away' if their choice is not available

46%

Branded shopper

43%

Private Label shopper

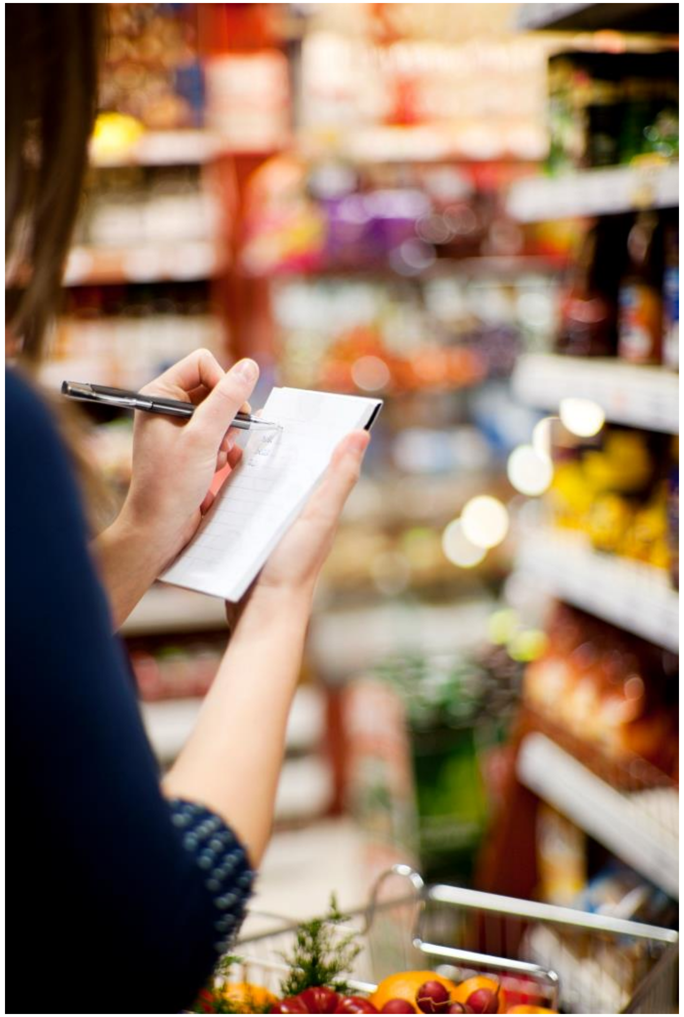
Biggest at-risk category – **Cosmetics** (72% walk away)

Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

ROUND 2:
What is the role of Brand and PL

Shopper Intelligence

Pre-store intentionality, does Brand or Private label drive the trip?



Planned to buy (before the store)
% shoppers

74%	79%

Trip mindset – "Main reason I go shopping"
% agreement with statement

8%	-3%
Branded shopper	Private Label shopper

Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

In-store engagement, a key part of the role brands play

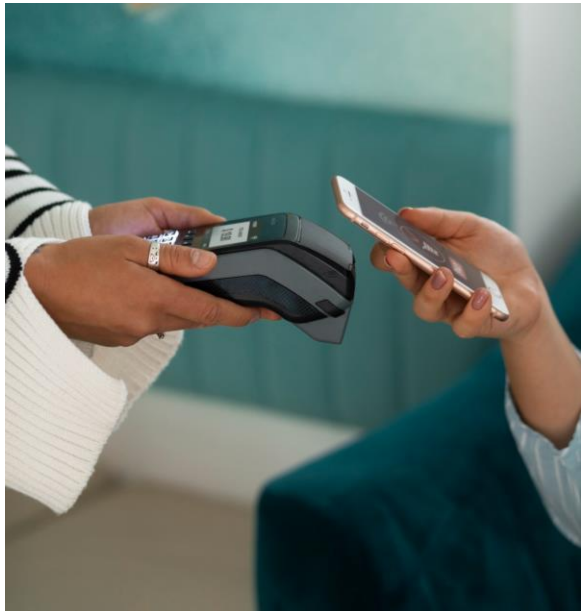
Shopper Intelligence

Browse (spend time looking)

% shoppers

29%
Branded shopper

22%
Private Label shopper



Buy mindset – "Don't mind paying more for better"

% agreement with statement

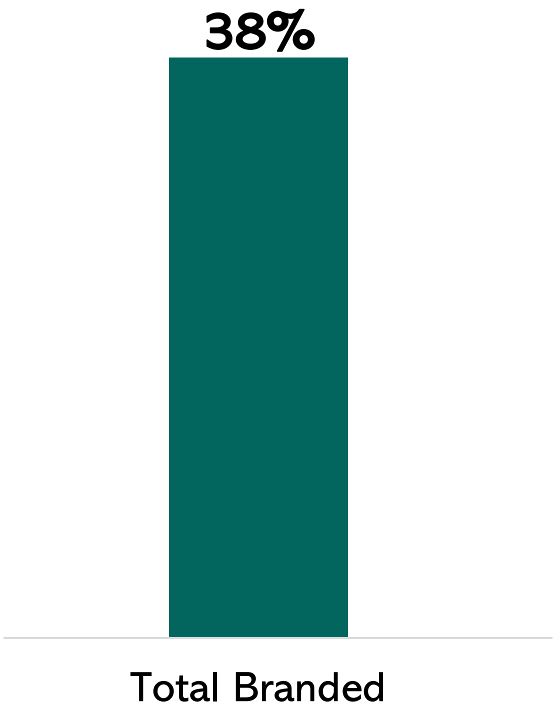
54%
Branded shopper

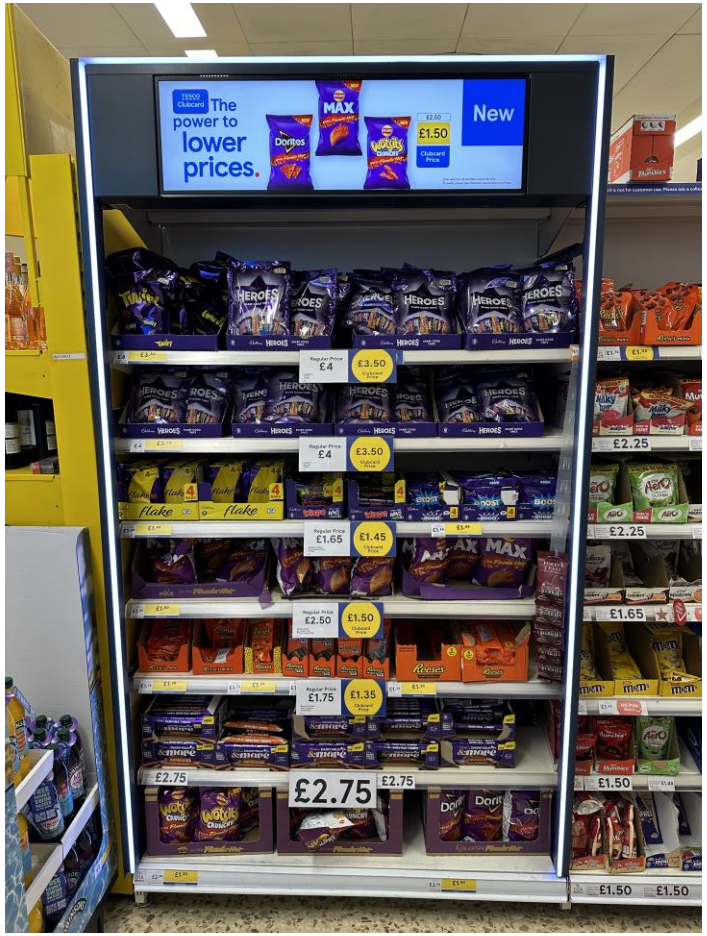
37%
Private Label shopper

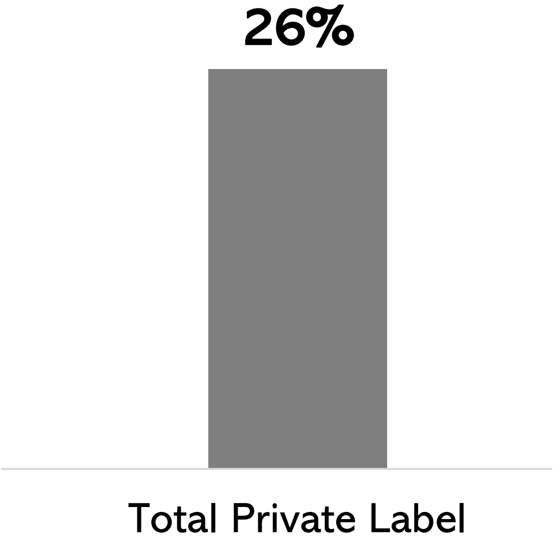
Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

This engagement transfers to other parts of the store, not just the main aisle

% of shoppers bought from secondary display







Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

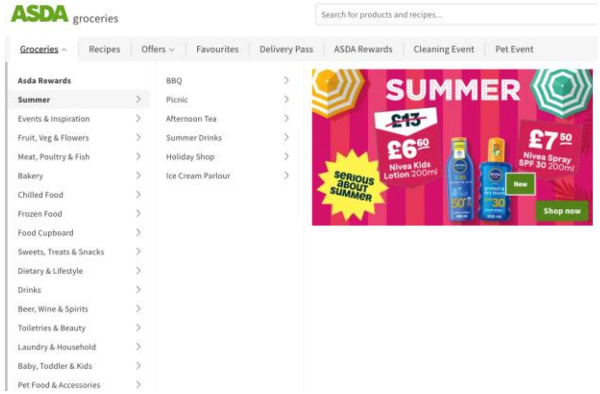
..and it presents a much greater opportunity for 'new'

Buy mindset – "often buy more to try new and different"
% agreement with statement

51%	42%
Branded shopper	Private Label shopper

Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

Branded shoppers are also more engaged with promotional mechanics before the trip



	Leaflet	Advert	Internet info	Coupon
Branded shopper	9%	9%	5%	5%
Private Label shopper	6%	5%	3%	3%

Shopper Intelligence, Q1, 2024 data, All Categories, Total Market, n=29,054

This engagement and intentionality can all be translated to our category role model to define the position for Brand and PL

Shopper Intelligence

ENGAGEMENT

Offers opportunity to trade up and build retailer loyalty.

Willing to pay more
High retailer loyalty

LOW X HIGH

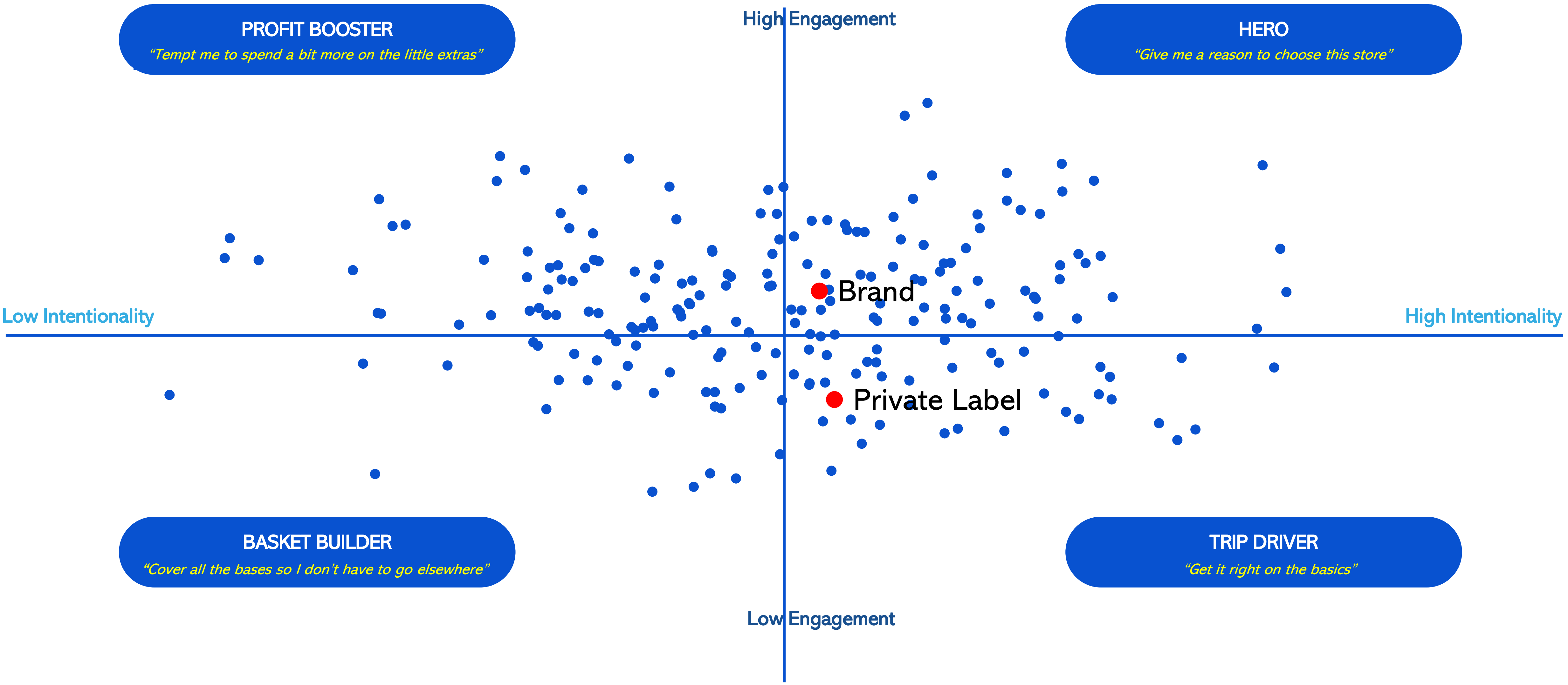
INTENTIONALITY

Drives shoppers to store and is highly planned.

Drives Traffic*
High Planned

*Traffic: "Main reason I go shopping" and "Promotions encourage shopping"

PL drives the trip, but Brand can drive store choice and greater engagement



ROUND 3:
Adapting the strategy to maximise the strength of each

Shopper Intelligence

What we know..

Shopper Intelligence

Branded shopper

- Younger
- Male
- More impulsive
- Influenced by promos
- More engaged
- Willing to trade up
- Buy from display
- Looking for new

Private Label shopper

- Older
- Female
- Heavily planned
- Shop quickly
- More loyal

Brand strategies

Shopper Intelligence

1 **Build excitement**

New products to tempt shoppers, use eye-catching displays to build on impulse opportunity, clear premium strategy in the right categories

2 **Enhance retailer image**

Optimise range to drive repeat visits (doing categories ‘well’), use theatre to create differentiation

Private label strategies

1 Traffic building

Ensure wide offer of products is available, optimise range to meet all shopper needs, talk to shoppers before the store to build on planned behaviour

2 Easy to shop

Create simplification to drive ease of shop and avoid shopper frustration, use merchandising to aid grab and go behaviour

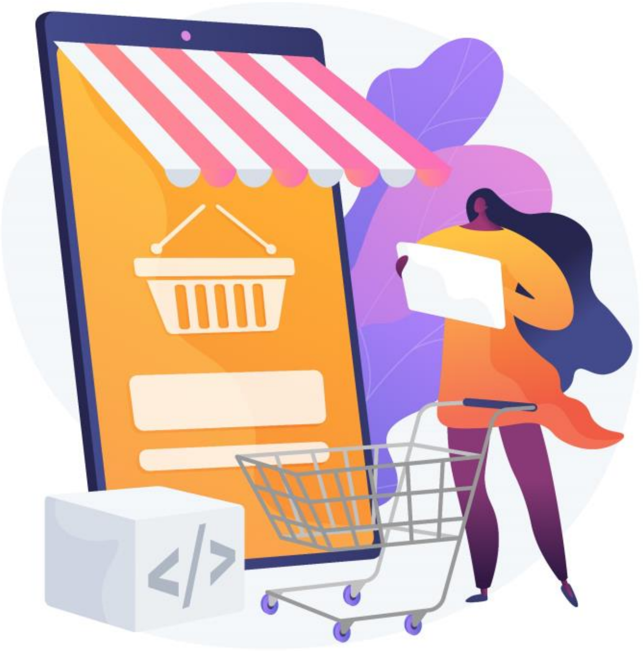
Questions?

Wrap up and next time..

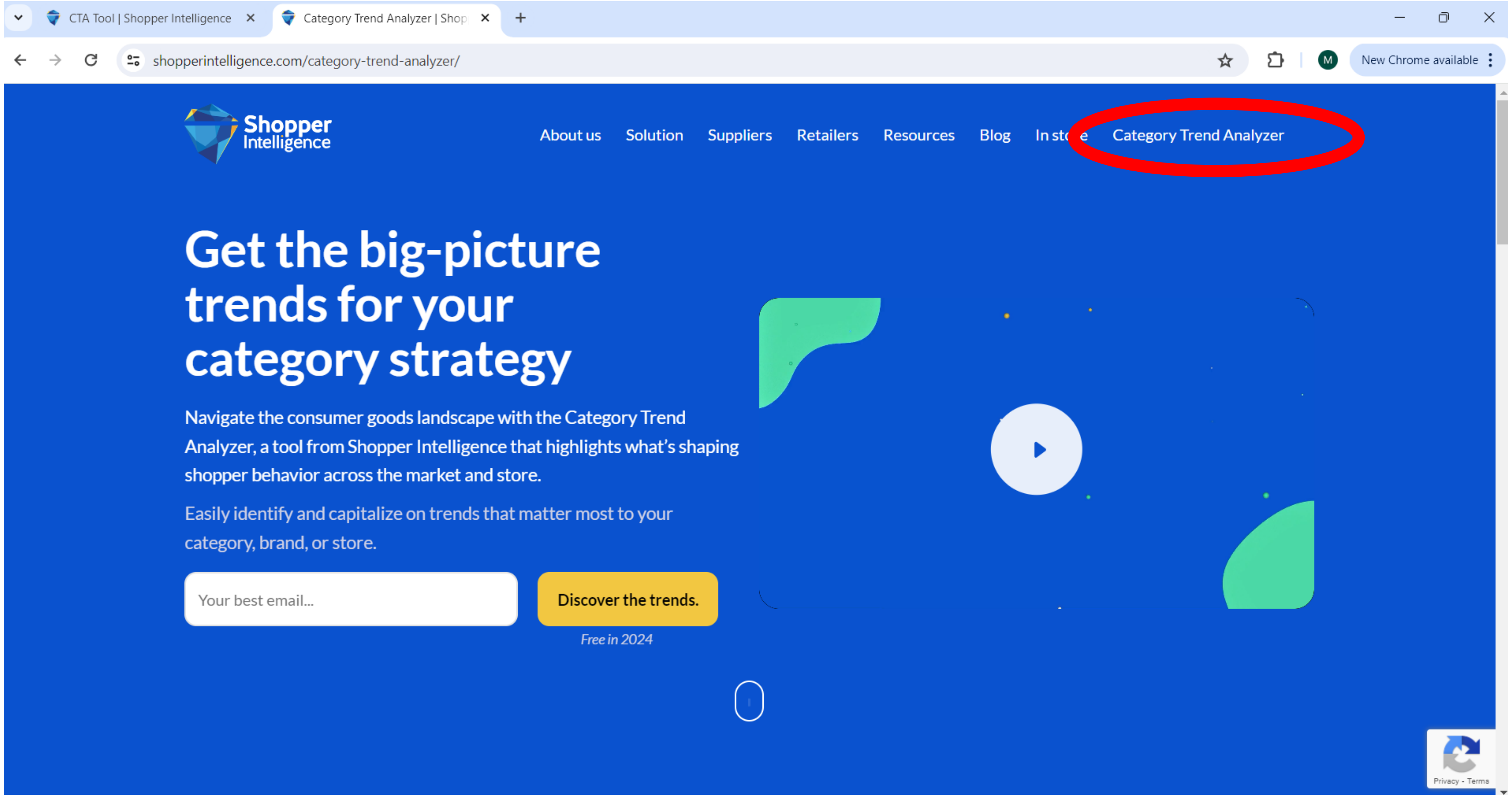
Shopper Intelligence

Next on Shopper Unpacked

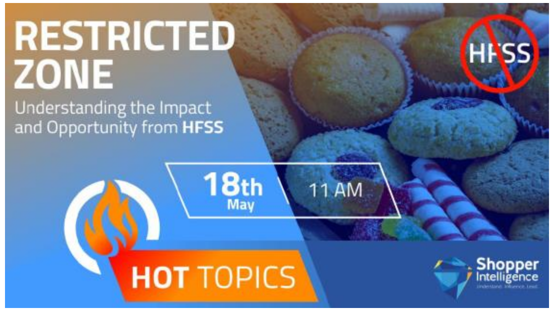
- Shopper Comparison by Channel
- Supermarket, Discounters, Online, Convenience
- Brand new 2024 data
- Provisional date: Wednesday 11th September



The Category Trend Analyser – Link in Chat!



www.shopperintelligence.com/resources/

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