



SHOPPER PANEL SPOTLIGHT

What's really in consumers' mind in their quest for clean label? To help you understand the motivations and opinions behind purchase behavior, FONA put together a shopper panel. The group spans the spectrum from Clean Savvy to Clean Avoider (visit www.fona.com/clean for details about our clean consumer personas). The group gets regular assignments, and we share our learnings with you!



This week, our shopper panel takes on...

PRIVATE LABEL

SITUATION

Our panel was asked to share their shopping habits and thoughts about what motivates them to choose a store's private label product.

- Given this list of purchase drivers, they were asked to rank them in order of importance:
- Affordable Product Options
 - Product Quality
 - Trust in the Retailer
 - Taste
 - Product Features
 - In-Store Sampling
 - Flavor Variety

KEY FINDINGS

AFFORDABLE PRODUCT OPTIONS

70%

indicated that "Affordable Product Options" (Price/Value) was the #1 motivation for purchasing a Private Label product.

PRODUCT QUALITY

60%

chose "Product Quality" as either their first or second reason for purchasing a Private Label product.

RECOGNITION

100%

Only one brand (out of 14 shown) had 100% recognition from all of our shoppers. Target Simply Balanced/Archer Farms came out on top!

Split on "Natural," but not ORGANIC

The group was evenly divided about "natural" private label products, with half saying they do not purchase private label products with natural claims. Organic, however, was moderately more attractive to our shoppers – with a 60% purchase rate for private label.



CLEAN SAVVY

View food as nourishment and carefully consider the food they eat and feed their family.



CLEAN BALANCER

Choose to eat healthy most days but like to indulge time to time.



CLEAN ASPIRATIONAL

Aspire to eat healthy but sometimes fall back into their own way of eating.



CLEAN AVOIDER

Food is pleasure. They're aware they could eat healthier, but they're not overly concerned.

(continues on reverse...)

PRIVATE LABEL continued

WHAT'S IMPORTANT TO YOU?



ANNE E.

"Actually I don't buy private label food-related items that are natural unless they are paper plates, paper towels, etc."



SARAH P.

"I buy certain natural products like salsa but do not fully trust the natural label. It's missing info about how it was grown and what was used on it. I do my best to avoid GMOs also. I feel "natural" is a marketing term that doesn't really tell me anything about the quality.."



ROBIN S.

"I am not motivated by the "natural" label. I am more motivated by price. Private labels are usually cheaper and I can't usually taste a difference. "

Shopping Cart Check

What products & label claims appear in our shoppers' carts this week? How do they track with our shoppers' clean personas? Let's take a peek.

- ✓ **CLEAN AVOIDER.**
Simply Nature Shredded Wheat
- ✓ **CLEAN ASPIRATIONAL.**
O Organics Ranch Dressing
Trader Joes Almond Butter
- ✓ **CLEAN BALANCER.**
Costco Kirkland Brand Pesto
Aldi's Organic Agave
Kirkland Honey
- ✓ **CLEAN SAVVY**
Fresh Thyme Chickpea Sedanini Pasta
Meijer Organic Peanut Butter
Trader Joes Organic Milk
Organics Virgin Coconut Oil



PAT M.

"I do look for private label products. I compare label-to-label and if the ingredients are identical, I will purchase the private label brand."

All this might leave you with a bit of a challenge. We get it, and we can help.

How do you deliver on label claims, nutrition and taste? What claim appeals to your consumer? FONA's subject matter experts can walk through your options in terms of taste solutions and label implications. Clean label spans the spectrum.

Where does your product fit in?

Let's talk. Visit us at:
www.fona.com/chat
or call 630-578-8600



THE TAKEAWAYS

1 Private label for cost

When it comes to purchase drivers for private label, cost is the main motivator for consumers.

2 Natural, nah. Organic, maybe.

Our consumers were split on natural claims in private label products, but organic fared slightly better.



CURIOUS ABOUT SOMETHING SPECIFIC?

Our panel can help inform YOUR decisions. Let us know what you'd like us to find out from our shopper panel.

Email LDemme@fona.com and let's dive in!