PLMA Consumer Research Report

Gen Z Loves Store Brands:

America's youngest consumers speak out on grocery shopping, stores & brands

Prepared exclusively for American retailers by the Private Label Manufacturers Association

I. Overview

They are the next great demographic cohort, destined to be as intensely studied as their generational predecessors, the Millennials. Indeed, they already have been.

Generation Z is described as the most diverse, best-educated, best-behaved, and most stressed-out demographic in the country's history. One thing for sure, they are sizable. Gen Zers comprise 21% of the total population, a figure likely to rise in the years ahead. In the U.S., there are approximately 80 million members of this one-of-a-kind cohort.

When it comes to shopping, experts assert that Gen Zers' behavior is marked by their reputation as digitally astute; health, socially and environmentally conscious; convenience-oriented, value-driven and devoted seekers of authentic and transparent experiences.

Halfway through their collective maturation, they already account for billions in discretionary spending. While most are only beginning to make a living and have limited spending power, even as children Gen Zers exert an inordinate degree of influence on how their families spend money. And they are taking those tendencies to adulthood. For Gen Zers, food is king, the biggest category of their spending. It starts at a young age. Four of five parents say their Gen Z kids were more involved in household purchases than they were at the same age.

The NRF adds, "We're seeing a shift in the way families shop where Gen Z children are more involved with purchasing. The ability to research products online and determine availability or lowest price has given these youngsters a bigger role and experience in the family buying." Parents report their Gen Z children have outsized sway over specific brands and retailers considered for patronage as well as product features that are important to the family. A majority of parents say they're more likely to buy from a store that makes it easy for them to involve their Gen Z children in the process.

That's a lot for marketers to chew on and even though the leading edge of Gen Z is only in their late-20s there are already volumes of advice on how CPG products can most effectively be sold to them. But there are almost no insights on their purchasing habits and attitudes when it comes to store brands, the food and non-food products that carry the retailer's name or private brand, which account for more than one in five grocery items sold in all retail outlets in the U.S.

To rectify that, PLMA commissioned a nationwide, online survey of 934 members of Gen Z. The universe consisted of men and women who self-identified as the primary grocery shopper for their household and were, by virtue of their stated date of birth, considered to be in Gen Z. The survey was conducted in mid-2023. Definitions for Gen Z vary and there is no official one. For our purposes, we involved shoppers born between 1995 and 2005, basically 18-to-28-year-olds. The survey consisted of about 30 questions, many with multiple parts, and was conducted for PLMA by Surveylab, a global leader in customized online research.

Questions homed in on Gen Zers' attitudes towards store brands, such as their awareness of the products and frequency of purchase, whether they experiment with store brands to find products with the best value, and how likely they are to feel hesitant about buying them. Participants were also asked to choose the best words to describe store brands and how the products reflect their personal values and beliefs. Included were several general lifestyle inquiries, such as how enjoyable do you find grocery shopping, how do you feel about your future, and what are your primary sources of information for learning about grocery products.

Survey Demographics

The primary survey universe consisted of 934 respondents: 51% female and 48% male. In age range, 16% were between 18 and 21, 43% between 22 and 25, and 41% between 26 and 28.

Nearly half live with a spouse or partner, 25% live with children, 26% live with parents and 17% live alone. As for the number of people in their household, 44% reported two or fewer and 35% said there were four or more. Some 71% stated they do not have primary caregiver responsibility for any children, 17% have responsibility for one child, 9% for two and 4% for three or more.

Almost one-fifth of the universe had a total household income of less than $25,000 during the prior 12 months while 13% reported household income was $100,000 or more for the period. Inflation changed their grocery shopping habits over the past year in the following ways: 62% said they looked for more sales, 58% cut back on expensive items and reduced impulse buying, 57% prioritized their needs over wants, 41% bought more store brands, 40% spent less money on groceries overall, 38% made fewer trips to the store, 29% bought larger quantities and sizes and 23% switched some of their shopping from a supermarket to a discount store.

Six in ten most often prepared the meals in their household; 39% prepare the household's meals at least five times a week. Two-thirds have made a recipe they saw online at least once during 2023. When it comes to where they learn about food and non-food grocery products, 61% said in the store while shopping, 43% cited social media, 32% word of mouth; 29% television, print or online ads; 22% retail websites or apps, and 19% digital coupons and smartphone apps.

Some 44% said they are "optimistic/very optimistic" about their future; only 7% are "pessimistic/very pessimistic." Meanwhile, 41% said they find grocery shopping "enjoyable/very enjoyable" while 5% find it "not enjoyable/not at all enjoyable."

II. Analysis of the Survey

The following analysis is based on the survey's findings and was prepared expressly for PLMA by Dr. Sara Williamson, PhD, a well-known consumer researcher; Assistant Professor, Marketing, SUNY Old Westbury, and a long-time faculty member of PLMA's Executive Education Program. Accounting for attention checks and missing data, her analysis examined the responses of 907 participants.

Gen Z is positive about future & shopping
44% of Gen Z are "very optimistic/optimistic" about their future
41% of Gen Z say grocery shopping is "very enjoyable/enjoyable"

A. Introduction

Gen Z is not arriving, they are here!

This population segment has a collective buying power of $853 billion globally and $463 billion in the U.S. alone. In fact, grocery and beauty are among their top five purchase categories. They are a resourceful bunch, reviving thrift culture to a fifty-billion industry and bringing along an established history of store brand loyalty in the fashion segment with apparel brands like H&M and Zara.

According to the Deloitte 2023 Gen Z and Millennial Survey, more than half of Gen Zers reported living paycheck to paycheck and the cost of living as a top societal concern. In fact, 46% are worried about the future and have taken on a second job (often entrepreneurial) to make ends meet. This is not to say that finances and future uncertainty are holding Gen Z back.

They are responding differently to the pressure. Recent research reveals Gen Z overwhelmingly reports no intention to shop less as prices increase, whereas the majority of consumers in other generations say they are planning to scale back. Compared to previous generations, Gen Z is also delaying milestone purchases in exchange for more indulgent luxury and beauty items, presumably influenced by a prevalent social media culture.

While previous research gives insight into the general lifestyle and values of Gen Z, we sought to understand perceptions and behavior as they relate specifically to store brand loyalty. Similar to Millennials at the same age, a significant proportion of Gen Z consumers are driven by their personal values when making lifestyle and career decisions. In fact, due to their values for self-expression, Gen Z is thought to be the most difficult generation to please and the most challenging to manage at work.

Gen Z wants their brands to stand for something, just as they do. Therefore, we expected that this emphasis on personal values and self-expression could pose a unique opportunity for store brands to connect with Gen Z shoppers by continuing to reach beyond a price-oriented value proposition and focus on aligning brand identity with the personal needs and values of Gen Z.

Across the survey results, we discovered a great deal to be excited about for store brands. In this report, we propose that store brands have a huge opportunity for innovation, engagement, and loyalty among these shoppers. Our study confirms that, above all, Gen Z consumers are looking for brand reliability in an otherwise unstable world. Further, they enjoy shopping in the store more than most think.

Store brands can offer Gen Z shoppers the digital, physical, and financial stability they need while providing the engaging and satisfying shopping experience they crave.

B. Gen Z Shopping Habits & Behavior

1. Grocery Shopping & Food Preparation

Gen Z shoppers are generally positive about grocery shopping, with 41% finding it very enjoyable. Contrary to popular belief, they do most of their grocery shopping in the store. Proportionately speaking, survey respondents purchase an average 74% in store and 26% online. This aligns with previous research that suggests Gen Z enjoys brick and mortar shopping as a matter of “retail therapy” and aims to avoid delivery fees.

Gen Z is not just shopping in-store, they are also learning about products there. When asked to choose their top three sources of information about grocery products, the most popular route was in-store shopping (61%), compared to the runners up: social media (43%), word of mouth (32%) and conventional advertising (29%). This reveals the importance of omnichannel promotion strategies that leverage social media and the point of sale.

Awareness & purchase of store brands.

Sixty-two percent of respondents reported that household meal preparation is their responsibility while 24% say they share the effort. Nearly 40% prepare five or more meals per week at home, which is significantly lower than the 66% of Millennials when PLMA surveyed them at the same age a decade ago.

There may be three explanations for this. One, compared to the 2014 Millennial Survey, a greater proportion of Gen Z reported sharing responsibilities for grocery shopping and meal preparation. This aligns with the changing culture around household structure and responsibilities. Second, the term “meal preparation” may mean something different to Gen Z, as a majority prefer ready to eat or value-added meals that require very little or no preparation. For example, when asked about favorite meals to prepare at home, a majority said pizza.

Third, retailers are all too familiar with the challenges of food delivery apps that have increased restaurant access for mealtime. Whatever the reason may be, the conclusion is that retailers should consider strategies to educate Gen Z in the store when it comes to meal prep solutions, given their enthusiasm for value-added and frozen foods and their propensity for learning about new products at point of sale.

2. Perceptions of Store Brands

Store brand awareness and purchase frequency are strong among Gen Z. Sixty-seven percent are highly aware of store brands at their favorite grocery stores and 64% frequently or always purchase store brands during a regular grocery trip. This is a substantial increase compared to PLMA's Millennial survey of same-age shoppers in 2014 and substantially higher than the general population, according to a report from CivicScience, a Pittsburgh-based opinion research firm. And, importantly, 51% of Gen Z shoppers frequently or always choose retailers due to their store brand offering.

Store brand loyalty might be a direct result of a generally positive perception of store brands. The majority of Gen Zers feel positively about choosing store brands, and 39% say they feel extremely positive. Respondents were shown a series of words to describe store brands and asked to indicate the extent to which each word was a good descriptor.

The store brand descriptors with the strongest positive response were "valuable," "reliable," and "trustworthy." Across all variables, the perception that store brands are "reliable" is the most significant predictor of store brand purchase frequency.

This result is substantially different from PLMA's 2014 Millennial Survey of same-age shoppers, where only 24% reported that brand trust was a main reason to buy store brands. While our results suggest Gen Z thinks the word "cheap" is an accurate descriptor of store brands, the word may not carry a negative connotation in their minds given the strong evidence of the positively associated words. Only 15% described store brands as "risky," which is highly correlated with respondents who reported being very hesitant or uncertain when choosing store brands (16% of the sample).

While Gen Z is likely to choose store brands and hold a positive feel toward the products, only 27% report they are highly likely to forgive store brands when a "mistake" of some kind occurs, although this proportion increases among those with greater brand engagement and loyalty.

3. Store Brand Purchase Drivers

Fully 56% of Gen Z are highly likely to experiment with store brands to find products with the best value. When asked to choose one reason to choose store brands aside from price, the most popular reasons were previous experience with the brand (28%) and expected quality (25%), followed by ingredients (15%) and sustainability (9%). Product uniqueness (5%), packaging design (3%), and brand reflects personal values (4%) were not the first choice among most Gen Z shoppers, but our survey suggests these factors do matter to a particular segment of store brand loyalists.

While “brand reflects my personal beliefs and values” is not a primary driver of store brand choice, 42% percent of Gen Zers report that store brand image or reputation is extremely important to their purchase decisions, and 30% believe it is extremely important for a store brand to reflect their personal beliefs and values. This suggests that some Gen Zers are looking for more connection when it comes to store brand identity, in particular.

4. Gen Z's Propensity for Brand Loyalty & Engagement

Previous research suggests that Gen Z shoppers are a bit variable when it comes to brand loyalty, and our results provide some insight on this topic. Only 32% strongly agree that they are more brand loyal than other people. Forty-seven percent strongly agree that they look for alternatives when their preferred brand increases its price. However, 55% are highly likely to recommend brands to family and friends when they are satisfied.

As previously mentioned, 43% use social media as a primary tool for learning about grocery products. However, only 18% are highly likely to engage with brands on social media. This speaks to an important consideration for social media marketing, as clicks, likes and shares are part of the conventional measures for whether a campaign is successful or not. Gen Z is looking but not clicking, which means that view numbers and length might be more effective to monitor.

Only 22% strongly agreed that they personally express themselves with general brand choice or find it important that the brand aligns with personal values. Notably, consumers who aim to personally connect and express themselves with brands are also more likely to pay a bit more for brands that provide this opportunity.

How Gen Z learns about grocery products.	
In-store shopping	61%
Social media	43%
Word-of-mouth	32%
Advertising via TV, print, online	29%
Retail websites or apps	22%
Smart phone apps	19%
Digital coupons	19%
Print coupons or sales papers	16%
Email	9%
Blog or information websites	7%
Text announcements	2%

Source: PLMA

C. Four 'Brand Loyalty' Segments

Looking across these survey results related to store brand and general brand loyalty, four distinct segments of Generation Z shoppers emerge. Two of the segments, which account for 45% of the total, are highly loyal to store brands, which is very optimistic considering the 80/20 rule (80% of your business comes from 20% of your customers).

1. Expressive Loyalists: Store Brands' Biggest Fans (23% of all respondents)

- 95% are highly aware of store brands at their favorite grocery stores
- 82% frequently or always purchase store brands during a regular grocery trip
- 77% frequently or always choose retailers due to their store brand offering
- 75% believe the words trustworthy, credible, and quality are strong descriptors for store brands.

Expressive loyalists are store brands' biggest fans. These Gen Zers, which represent 23% of all survey respondents, exhibit exceptionally strong store brand loyalty, purchase frequency, and positive perceptions of store brand products. Eighty-two percent of this segment purchases store brands frequently or always during a regular grocery visit, and 77% frequently or always choose a retailer due to its store brand offerings.

Brand loyalty among Expressive Loyalists is driven by a desire to express their identity, beliefs and values through brand choices. Fifty-seven percent strongly agree they are willing to pay more for brands that align with their personal values and 73% feel it is very important for store brands, in particular, to align with their beliefs. The good news? Store brands make these Gen Zers happy, as 82% report they feel very positively about themselves when choosing a store brand product (compared to 26% of the others).

Expressive Loyalists simply enjoy grocery shopping more. In fact, 78% report that grocery shopping is extremely enjoyable, compared to 29% of the others. Worth noting is that, compared to others, more Expressive Loyalists would describe store brands as "fun" and 91% are very likely to experiment with store brands to find products with the best value.

Source: PLMA

This provides an opportunity for interactive online and in-store product positioning, as Expressive Loyalists purchase an average 70% of their groceries in store and 30% online. Expressive Loyalists are the more digitally inclined of the Gen Z segments when it comes to grocery product promotion, and they are the more likely to learn about grocery products via email and smartphone than the others.

There is a great entree for establishing a strong brand relationship with this segment in the immediate future. Some 64% strongly agree they would look for alternative brands if their preferred brand raised its prices. While this may seem like an indicator of brand disloyalty, it could provide an open door for store brands to establish long term relationships in the wake of inflation pricing, especially considering how likely this group is to experiment as two-thirds strongly identify as more brand loyal than others they know and nine of ten experiments with store brands to find products with the best value.

It would be smart for retailers to leverage this segment’s desire to personally connect with brands they choose, as they wish to express their personal identity and share a common bond with others who choose the same brands. Not only are they the most likely to be influenced by friends and family when it comes to choosing grocery products, 84% strongly agree that they recommend brands to family and friends when they are satisfied.

A larger proportion of this segment is solely responsible for meal preparation (74%) and they tend to manage a slightly larger household, as 49% of the Expressive Loyalists report living with a spouse or partner and 35% live with children.

2. Functional Loyalists: The Stereotypical Value Shoppers (24% of all respondents)

- 85% are highly aware of store brands at their favorite grocery stores
- 90% frequently or always purchase store brands during a regular grocery trip
- 63% frequently or always choose retailers due to their store brand offering
- 71% believe the word “cheap” is a strong descriptor for store brands

Functional Loyalists are the stereotypical value shoppers that have historically contributed to store brand success. These Gen Zers, which make up 24% of the total sample, exhibit significantly strong store brand purchase frequency. In fact, 90% report buying store brands frequently or always during a regular grocery trip. This segment is motivated by value. Store brand loyalty among these shoppers is driven by the sense that store brands are less expensive,

but also low risk, reliable, and credible. Aside from price, this segment chooses store brands based on their previous experiences with the brand and the quality they have come to expect from the products.

Compared to the 78% of Expressive Loyalists who find grocery shopping extremely enjoyable, only 33% of Functional Loyalists feel the same. While these shoppers may not enjoy the task as much, they are significantly more confident when choosing store brands; only 4% report strong uncertainty or hesitancy when choosing store brands, compared to 32% of Expressive Loyalists. These Gen Zers are significantly less concerned with store brand reputation or alignment with personal values (12% and 3%, respectively; see Summary tables) and only 26% derive strongly positive feelings from choosing store brands.

Despite low shopping enjoyment, there is still a great opportunity to position store brands with this group, as 77% are highly likely to experiment with store brands to find the best value. Note that this segment tends to purchase a bit more in the store as opposed to online and 70% report in-store shopping is a primary way they learn about grocery products. Brick and mortar store brand positioning is important for this pragmatic and value-driven segment.

Functional Loyalists are similar in likelihood to learn about grocery products via social media, however, they do not identify personally with brands or express themselves through brand choices. They exhibit very low likelihood of brand engagement and an average likelihood of telling others about brands they like. Promotion via social media would be most effective when focused on price value, reliability, and function. Importantly, this segment may not exhibit conventional impressions such as likes and shares, therefore, reach will be difficult to measure.

An important consideration is that a slightly, but notably greater proportion of this segment makes less than $25,000 per year (23% compared to 19% of total), which is below the U.S. poverty line. While analysis shows no statistical difference in income across the store brand segments, one might presume that consumers with limited disposable income would exhibit a more functional approach at brand loyalty (as opposed to the values-driven perspectives among Expressive Loyalists).

3. Optimistic Moderates: The Average Young Shopper (31% of all respondents)

- 57% are highly aware of store brands at their favorite grocery stores
- 53% frequently or always purchase store brands during a regular grocery trip
- 42% frequently or always choose retailers due to their store brand offering
- 55% believe the word “reliable” is a strong descriptor for store brands

Optimistic Moderates represent 31% of Gen Zers and are a mixed bag of shoppers with moderate to positive perspectives on store brands. A greater proportion of this segment reports that expected quality would be the reason to choose a store brand. Worth noting is that, compared to the other segments, a greater proportion of Optimistic Moderates learn about grocery products via social media whereas a lesser proportion learn via word-of-mouth. They exhibit below average likelihood to forgive store brands for an unsatisfactory product experience but an above average desire for store brands to align with personal beliefs or values.

Some 57% are solely responsible for meal preparation compared to 78% of Expressive Loyalists, possibly because a significantly higher proportion of this segment (35%) lives with parents compared to the more loyal segments. Upon analysis, living with parents does not significantly affect store brand purchase frequency or a likelihood to experiment with products, but it does reduce Optimistic Moderates' likelihood to choose a retailer due to its store brand products.

This may suggest that as shoppers become independent and start their own households, they are open to choosing different retailers than their parents and store brands can drive that choice. Marketers should consider raising store brand and retail awareness via social media for this segment.

4. Discerning Reluctants: The Less Engaged Shopper (22% of all respondents)

Relative to the other segments, these Gen Z consumers are the least aware of and loyal to store brands. That said, half of them frequently choose retailers due to their store brand offering, which is a significantly greater proportion than the Optimistic Moderates.

This suggests that the "right" store brand item can motivate the Discerning Reluctants toward retail loyalty. If marketers want to increase store brand awareness with this group, 62% report that in-store shopping is a primary route of learning and worth noting is that social media is less effective. Word of mouth is a bit more popular with these shoppers compared to others. Discerning Reluctants are the least likely to tell friends and family when they are satisfied with a brand and, generally speaking, exhibit very low brand loyalty.

This segment also reports the least enjoyment with grocery shopping and, relative to the others, they cook less at home with more of the responsibility being shared. Notably, they do not exhibit a different household structure or income relative to the other respondents.

The presence of Discerning Reluctants should not be interpreted as a Gen Z issue so much as the normal reality that marketers cannot reach all consumers all the time. Beware of over-investing in the least engaged customers at the expense of not investing enough with Expressive and Functional Loyalists who steer the ship.

5. Assessing the Segments

An interesting observation when comparing Functional Loyalists to Expressive Loyalists is the clicks and bricks differential. Store brand managers have long been concerned that Gen Z is not shopping in the store enough to learn about products. What we see is that the majority of purchases are still in-store across all segments. However, being an Expressive Loyalist is predictive of shopping more online whereas the Functional Loyalists are shopping a bit more in store.

What's the takeaway for store brands' best two segments? Expressive Loyalists exhibit digital leaning and significant store brand engagement as a matter of shopping enjoyment and fun, whereas the Functional loyalists are store-leaning and personally disengaged from the brands (despite very strong awareness of them). Given the segments are similar in size, it may be advantageous to take a differentiated approach at targeting customers with new store brand offerings.

Still, potential lies with the Optimistic Moderates. They exhibit a strong awareness and a generally positive outlook on store brands. They just need time and experience to build a brand relationship as they grow into independence from living with parents to building their own life. Brand messaging related to independence and making one's own choices could be effective here.

Source: PLMA

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E. Summary for defining measures: Total sample & segment.

	Total Sample	Expressive Loyalists	Functional Loyalists	Optimistic Moderates	Discerning Reluctants
Responses to Key Questions by Segment	**907**	**211**	**213**	**283**	**200**
% of Total Respondents	100%	23%	24%	31%	22%
Enjoyment of Grocery Shopping *(% "High")*	41%	78%	33%	37%	16%
Proportion of Monthly Grocery Bought Online *(average %)*	26%	31%	21%	27%	27%
Proportion of Monthly Grocery Bought In-store *(average %)*	74%	70%	79%	73%	74%
Store Brand Purchase Frequency *(% Always + Frequently)*	64%	82%	90%	53%	32%
Chooses Retailer due to Store Brand *(% Always + Frequently)*	51%	77%	63%	42%	51%
Percent who think the word describes store brands "very much" or "precisely"					
Trustworthy	48%	78%	47%	48%	20%
Authentic	35%	64%	24%	34%	16%
Innovative	27%	58%	18%	26%	6%
Credible	42%	67%	45%	43%	13%
Risky	15%	20%	8%	14%	19%
Cheap	58%	61%	71%	55%	47%
Reliable	52%	75%	56%	57%	18%
Fun	26%	55%	16%	28%	11%
Quality	45%	75%	41%	50%	14%
Valuable	53%	75%	59%	51%	24%
Variety	50%	74%	51%	51%	26%

Source: PLMA

Aside from price, what is the main reason you choose a store brand?	Total Sample	Expressive Loyalists	Functional Loyalists	Optimistic Moderates	Discerning Reluctants
Previous Experience With the Brand	28%	24%	34%	25%	31%
Expected Quality	25%	24%	20%	31%	22%
Ingredients	15%	14%	13%	17%	15%
Sustainability	9%	12%	7%	9%	9%
Product Uniqueness	5%	9%	4%	4%	4%
Packaging Design	3%	3%	3%	3%	5%
Brand Reflects Personal Values	4%	8%	1%	3%	5%
Store Brand Resonance					
% "High"					
Aware of store brands at favorite grocery	67%	95%	85%	57%	35%
Experiments with Store Brands to Find Best Value	56%	91%	77%	46%	12%
Feels Hesitant or Uncertain About Choosing Store Brands	16%	32%	4%	14%	14%
Feels Good About Self When Choosing a Store Brand	39%	82%	26%	40%	6%
Importance of Store Brand Image or Reputation	42%	83%	12%	55%	14%
Importance for Store Brand to Reflect Personal Beliefs and Values	30%	73%	3%	37%	4%
Likelihood to Forgive a Store Brand	27%	62%	24%	15%	9%

Source: PLMA

Brand Resonance	Total Sample	Expressive Loyalists	Functional Loyalists	Optimistic Moderates	Discerning Reluctants
% "High"					
Looks for alternative brands if a preferred brand increases prices.	47%	64%	56%	48%	16%
Engages with favorite brands on social media through views, likes, or shares.	18%	46%	6%	15%	4%
Pays more for brands that align with personal beliefs and values.	22%	57%	5%	19%	5%
Recommends satisfactory brands to friends and family members.	55%	84%	50%	54%	32%
Believes that brand choices reflect them as a person.	23%	63%	5%	20%	5%
Places importance on expressing individuality with product and brand choices.	22%	61%	6%	17%	3%
Shares a common bond with the individuals who choose the same brands.	21%	59%	6%	16%	5%
Compared to others, finds themselves more loyal to favored brands.	32%	67%	20%	32%	10%

Source: PLMA

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For more information on the survey, including complete data tabulations for all of the questions, please contact Tom Prendergast, Director of Research Services, at tprendergast@plma.com.