Impact of food retailer branding on expectation generation and liking

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Abstract: Branding can influence sensory evaluation, however, the impact of food retailers from different tiers (premium, everyday and discount) remains undocumented. The aim of this project was to test whether food retailers generated different quality expectations and establish whether these impacted on sensory evaluation. Expected liking of 4 chocolate samples (private brand, premium, everyday and discount food retailer brands) was measured using a survey (n=199) and hedonic ratings (n=152) were obtained in blind and informed conditions. Seventy one of the 152 panelists were required to rate their expected liking prior to the informed hedonic test to assess whether stating expectations could influence subsequent liking. The premium food retailer and private brand generated similarly high quality expectations which resulted in significant disconfirmation although a significant response shift was only observed for the private brand when expectations were measured. In contrast, the everyday and discount food retailers generated lower expectations which aligned well with the sensory experience.

Practical applications: Although established private brands are still perceived as the gold standard; premium food retailers can also generate high expectations and there is a clear hierarchy of expectations between food retailers' tiers. In spite of this, branding had a modest impact on sensory evaluation compared to actual product quality with partial assimilation observed only for the private brand. Food retailers should continue to develop their product quality to carry on improving their brand image. Asking panelists to state their expectations just prior to the informed hedonic testing could result in self-induced suggestion error. It is recommended that expectations and informed liking are captured sufficiently far apart when using the same panelists.

Keywords: Food retailer; sensory; branding; disconfirmation; assimilation; suggestion error

1. Introduction:

The impact of external cues and expectations on sensory evaluation has been an important field of study for over two decades (Deliza and MacFie 1996). It is generally accepted that extrinsic characteristics and quality cues can impact on quality expectations which in turn may impact on evaluations of quality (Fernqvist and Ekelund 2014). Several theoretical frameworks have been developed to model the impact of discrepancy between expectations and the actual sensorial experience on sensory evaluation (Anderson 1973; Deliza and MacFie 1996; Piqueras-Fiszman and Spence 2015); these are: (1) assimilation, in which the consumer resolves the discrepancy between expectation and experience (generally termed disconfirmation) by shifting the sensory rating (generally termed response shift) in the direction of their expectation. The majority of empirical evidence described in the literature appears to fit this model. (2) contrast, in which the discrepancy between expectation and experience results in a magnification of the difference and response shift in the opposite direction of their expectation. (3) Generalized negativity, which proposes that any discrepancy between expectation and experience results in lower hedonic scores regardless of whether the actual experience surpasses or falls short of expectations. Finally (4) the assimilation-contrast model supposes that either assimilation or contrast can occur depending on the magnitude of the disconfirmation. For small differences, assimilation is predicted to occur whilst big differences are expected to result in contrast.

The type of extrinsic cues or information susceptible to generate expectations and impact on hedonic ratings are numerous but the most commonly investigated span health claims, country or region of origin, production method, product description and branding (Fernqvist and Ekelund, 2014; Kim *et al*. 2015; Mueller and Szolnoki 2010; Vraneševic´ and Stancec 2003). Although the underlying mechanisms through which information impacts on hedonic ratings may be similar; the effect is likely to differ with extrinsic cue type. As such, only

studies reporting specifically the effect of branding are considered further in this work. Table 1 presents a summary of studies reporting the effect of branding (full label or brand name) on hedonic rating. Studies which did not report statistical significance for the effect of branding on expectations or hedonic ratings were not included. A series of studies has shown brand to have a strong impact on hedonic ratings, however, this is not a systematic trend (Table 1).

TABLE 1: SUMMARY OF STUDIES REPORTING THE IMPACT OF BRANDING (FULL LABEL OR BRAND NAME) ON LIKING. STUDIES WHICH DID NOT REPORT STATISTICAL SIGNIFICANCE WERE EXCLUDED.

	References	Sample	Information provided	Number of participants	Expectation measured?	Disconfirmation / Confirmation	Response shift?
Expectations recorded simultaneously or just before to the informed condition	(Torres-Moreno et al., 2012)	Dark chocolates (6)	Brand	109	Just before the informed condition	Disconfirmation observed in 4 samples out of 6	Response shift (assimilation) observed in 1 sample
	(Stolzenbach et al., 2013)	Apple juices (4)	Full label	≈ 45 per sample	Just before the informed condition	Disconfirmation observed in 2 samples out of 4	Response shift (assimilation) observed in 2 samples
	(Varela et al., 2010)	Orange flavoured powdered drinks (10)	Full label	108	Just before the informed condition	Disconfirmation observed in 6 samples out of 10	Response shift (assimilation) observed in 4 samples
	(Lange et al., 2002)	Champagnes (5)	Full label	66	Just before the informed condition	Disconfirmation observed in 5 samples out of 5	Response shift (assimilation) observed in 4 samples
	(Di Monaco et al., 2004)	Pastas (11)	Brand	45	Measured but did not state at which stage	Disconfirmation observed in 7 samples out of 11	Response shift (assimilation) observed in 3 samples
	(Arcia et al., 2012)	Low fat cheeses (6)	Full label	73	1 month before the informed condition	Disconfirmation observed in 4 samples out of 6	Response shift (assimilation) observed in 3 samples
recorded or	(Carrillo, Varela, & Fiszman, 2012)	Biscuits (10)	Full label	30 for blind, 30 for expected and 30 informed	With different groups	/	No response shift observed

	(Allison, Gualtieri, & Craig-Petsinger, 2004)	Breakfast cereals (3) and cheese crackers (3)	Brand	100 for blind, 100 for informed	No	/	No response shift observed
	(Di Monaco, Cavella, Iaccarino, Mincione, & Masi, 2003)	Tomato purees (6)	Brand	30 for blind, 30 for informed	With different groups	/	Response shift observed in 4 samples
	(Vidal, Barreiro, Gomez, Ares, & Gimenez, 2013)	Vanilla milk desserts (6)	Full label	50 for blind and 50 for informed	No	/	Response shift observed in 2 samples

When expectations were measured, disconfirmation was observed for some or all of the samples. This suggests that branding may generate expectations which do not align well with the sensorial experience. A response shift, always in the form of assimilation, was observed for some of the samples of all the studies in which expectations had been recorded to test for disconfirmation. In contrast, a response shift was only observed in 2 out of the 4 studies in which expectations had not been recorded. One explanation may be that the experience matched the expectation reasonably well, however this is difficult to assess in the absence of recorded expectations. On the other hand, one may wonder to which extent requiring panelists to articulate their expectation of quality and commit it to the paper / computer does not influence their subsequent informed hedonic rating with panelists more likely to rate the product in line with their stated expectation (assimilation).

When introduced, own label store brands (OLSBs) were typically perceived as low quality, low priced substitutes for manufacturer or national brands (Cotes-Torres *et al*. 2015; Li *et al.* 2015). However, these perceptions are now changing as retailers move to position OLSBs as viable alternatives, making significant investments in their image and reputation (Rubio *et al.* 2014) as well as product quality development, sometimes matching that of private brands (Di Monaco *et al.* 2004; Torres-Moreno *et al.* 2012) although not systematically (Olsen *et al.*

2011). As a result of this there is now little doubt that OLSBs are growing in popularity and acceptance. This is confirmed by recent industry and market data (Addy 2013; IGD Retail Analysis 2017; Kantar 2014; Mintel 2014). This being the case, few studies have explored the differences that may exist in consumer perceptions of OLSBs across differentially positioned retailers in the food marketplace, even though the quality image of store brands has been shown to differ between individual food retailers (Guerrero *et al.* 2000) . Despite this, little is known about the relationship between consumer expectations of different food retailers OLSBs product quality and resulting sensory evaluation. In the absence of this understanding, the objectives of this project were to:

- Assess whether differences in food retailers brand image generate different expectations in terms of product quality. To test this, expected liking for chocolate from 3 major UK food retailers selected to represent the premium, daily and discount categories were measured against a private brand benchmark.

- Assess whether expectations generated by food retailers' own brands align well with their product organoleptic quality tested in blind conditions to test for disconfirmation.

- Test whether observed disconfirmation induced by food retailers' branding resulted in response shifts by comparing products hedonic ratings in blind and informed conditions.

- Test whether measuring expectations prior to acquiring hedonic ratings in the informed condition significantly impacted on response shift. To achieve this, participants were randomly allocated to a condition where expectations were not measured or a condition where expectations were measured just prior to the informed hedonic testing.

2. Materials and Methods:

2.2. Samples:

Milk chocolate was selected as the focus of this study as it is a staple product which is versatile in its image and cuts across the category range from basic to luxury. It is also a popular product which does not require preparation. Three major UK food retailers representing the discount, everyday and premium categories were selected to be compared and benchmarked against a leading private brand. The chocolate samples were purchased from the local stores. Where appropriate (blind testing), the branding engraved in the chocolate was carefully removed using a vegetable peeler so as to present a uniform and smooth finish.

2.3. Studies:

There were 3 parts to this project (Figure 1): one in which only consumer expectations were captured using an online survey and which did not involve any sensory testing (n=199), one in which both expectations and sensory testing were measured (n=71) and one in which only the sensory testing was recorded (n=81).

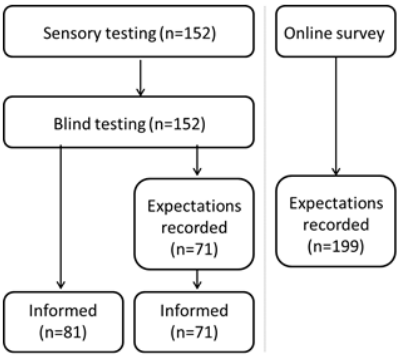


FIG. 1. EXPERIMENTAL PLAN FOR THE SURVEY (N=199) AND SENSORY TESTING (N=152)

197 2.4. Expectations:

198 The expectation generated by retailer branding was assessed by asking participants to rank in
199 order of expected preference milk chocolates from the private brand as well as the 3 food
200 retailers. One hundred and ninety nine participants filled the online survey and 71 completed
201 the identical paper version during the sensory sessions in which expectations were recorded
202 (Figure 1). Simultaneously, self-reported frequency of shopping at the main UK retailers
203 (Aldi, Asda, Co-op, Lidl, Marks and Spencer, Morrison's, Netto, Sainsbury's, Spar, Tesco
204 and Waitrose) was recorded with options as follows: never, every 3 months or less, every 1 to
205 3 months, every 2 to 4 weeks and weekly or more. For the purpose of this study, Marks and
206 Spencer and Waitrose were considered "premium" food retailers; Asda, Co-op, Morrison's,
207 Sainsbury's, Spar and Tesco were considered as "everyday" and Aldi, Lidle and Netto
208 "discount". Generic demographic information was also captured (age, gender and whether the
209 participants were studying or working in the field of food and nutrition).

210 2.5. Sensory testing:

211 Two studies were carried out (Figure 1). In the first study, expected liking of chocolates from
212 different retailers were recorded just prior to carrying out the informed sensory testing whilst
213 in the second study, expectations were not recorded. For both studies, the same 4 chocolates
214 were tested twice, in blind condition (samples presented with a 3 digit code as identifier) and
215 informed condition (samples identified by the food retailer name or brand, the actual labels
216 were not presented). For both sets of testing, the 4 chocolates were presented simultaneously
217 in a randomized order; participants were asked to rank them in order of preference then rate
218 them for liking on a 9 point hedonic scale (dislike extremely to like extremely). Presenting
219 samples simultaneously has been shown to yield similar results to monadic testing and found
220 to be possibly more sensitive (Colyar *et al.* 2009). These findings were later confirmed in a

study specifically comparing the hedonic scores of 4 to 5 products presented monadically or simultaneously (rank-rating) and in which overall liking scores were found not to depend on presentation protocol (Gutierrez-Salomon *et al.* 2014). Samples were presented at room temperature with water and cracker for palate cleansing in individual booths lighted with Northern lights. All the sensory testing occurred in a single session.

2.6. Participants:

Participants for the online survey (n=199) were recruited by word of mouth and using social media. Participants on the sensory studies (n=152) were recruited by word of mouth, flyers in and around the University and using a sensory consumer database set up for this purpose. Participants were randomly allocated to the study in which expectations were measured (n=71) or not (n=81). The participants consisted of 99 females and 52 males. Sixty of them (39.5%) studied or worked in the field of food and nutrition (food manufacturing, food retailing, catering and food services, dietetics, nutrition and health). The participants' average age was 33.8 years of age (standard deviation 16.9 years, range: 17 – 79 years).

2.7. Data analysis:

A hierarchical cluster analysis (Ward's linkage, Eucledian distance) was performed on shopping habits to assess whether consumers with different retailer shopping habits had different expectations in terms of expected preference of milk chocolates from different retailers. Within each cluster, the food retailers in which participants were deemed to predominantly shop at were identified as those for which the mode corresponded to "weekly or more" and "every 2 to 4 weeks". The ranking data was analyzed using a Friedman test followed post-hoc by an LSRD test. Within each study (with / without recording individual expectations), the sensory results were analyzed using a repeated measures ANOVA (factor: chocolate brand) where appropriate a Greenhouse-Geisser correction was applied and post-

hoc, a Bonferroni test was carried out. Disconfirmation was estimated by comparing the expected and blind liking (expected-blind) and response shift was estimated by comparing the informed and blind hedonic ratings (blind-informed) as described elsewhere (Arcia *et al.* 2012; Di Monaco *et al.* 2004; Stolzenbach *et al.* 2013; Torres-Moreno *et al.* 2012). Two tailed one sample t-tests were performed to test whether the disconfirmation and response shifts were significantly different from 0. All significance levels were set at α=0.05 and all statistical tests were performed using SPSS v23 (IBM, Chicago, USA).

2.8. Ethics:

The study received approval from the faculty research ethics committee. Participants were informed of their right to withdraw at any point and written informed consent was obtained prior to starting.

3. Results:

3.2. Expectations:

The expected liking (ranking) obtained from the online survey (n=199) and sensory study (n=71) were pooled together as there were no difference in overall ranking between the electronic and paper versions of the questionnaire. The incomplete answers were removed which yielded a dataset of 266 valid answers. Table 2 presents the preference ranking order for the 4 retailers by consumer cluster.

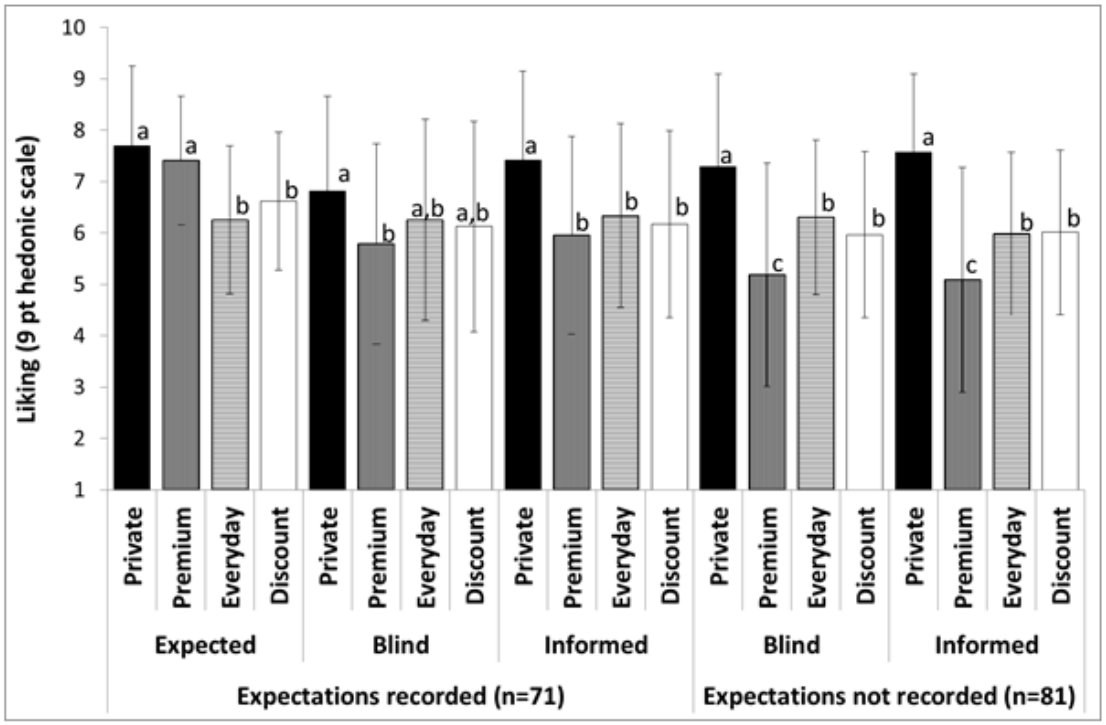
TABLE 2: RANKING ORDER FOR EXPECTATIONS OF MILK CHOCOLATES FROM THE PRIVATE, PREMIUM, EVERYDAY AND DISCOUNT BRANDS, OVERALL AND BY CLUSTER BASED ON SELF-REPORTED SHOPPING FREQUENCY. LETTERS AS SUPERSCRIPT INDICATE SIGNIFICANT DIFFERENT RANKS.* AND ** REPRESENT RESPECTIVELY: SHOPS THERE 'WEEKLY OR MORE' AND 'EVERY 2 TO 4 WEEKS'.

Cl. N.	Consumers	Av. Age (sd)	Gender (F%, M%, U%)	Working in food or nutrition (No%, Yes%, U%)	Rank 1st for expected preference	Rank 2nd for expected preference	Rank 3rd for expected preference	Rank 4th for expected preference
All (n=266)	/	32.1 (15.1)	68.8%, 30.5%, 0.8%	68.4%, 27.8%, 3.8%	Private[a]	Premium[b]	Discount[c]	Everyday[c]
Cl. 1 (n=81)	Predominantly shopping at Sainsbury's* and Tesco*	33.7[a] (17.3)	61.7%, 37.0%, 1.2%	74.1%, 21.0%, 4.9%	Private[a]	Premium[b]	Everyday[c]	Discount[c]
Cl. 2 (n=66)	Predominantly shopping at Aldi*	30.9[a,b] (14.1)	83.3%, 16.7%, 0.0%	59.1%, 37.9%, 3.0%	Private[a]	Premium[b]	Discount[b]	Everyday[c]
Cl. 3 (n=50)	Predominantly shopping at Morrison's* and Asda*	32.1[a,b] (15.3)	70.0%, 30.0%, 0.0%	68.0%, 30.0%, 2.0%	Private[a]	Premium[b]	Discount[c]	Everyday[c]
Cl. 4 (n=34)	Predominantly shopping at Aldi**, Sainsbury's* and Tesco**	39.1[a] (17.4)	58.8%, 38.2%, 2.9%	61.8%, 29.4%, 8.8%	Private[a]	Premium[b]	Discount[b]	Everyday[c]
Cl. 5 (n=35)	Predominantly shopping at Sainsbury's*	24.6[b] (7.8)	65.7%, 34.3%, 0.0%	80.0%, 20.0%, 0.0%	Private[a]	Premium[b]	Everyday[b]	Discount[c]

Overall and for all 5 clusters, the private label was the chocolate which consumers expected to like the best and significantly more than the second best liked sample which was the premium food retailer across all clusters. The everyday and discount brands were respectively in third and fourth position and were not significantly different from one another, however, this pattern was broken for the two clusters (clusters 2 and 4) which reported shopping predominantly at a discount retailer (Aldi) and which expected the discount chocolate quality not to differ significantly from the premium food retailer's but expected it to perform significantly better than the everyday brand chocolate (Table 2). No specific trend was observed with respect to age or gender.

283 3.3. Sensory studies:

284 Figure 2 presents the expected and actual liking scores (in blind and informed conditions) for
285 study 1 (when expectations where recorded between the blind and informed conditions) and
286 study 2 when expectations were not recorded.



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288 FIG. 2. EXPECTED AND ACTUAL (BLIND AND INFORMED) LIKING SCORES FOR
289 CHOCOLATES WHEN EXPECTATIONS WERE RECORDED BETWEEN THE BLIND
290 AND INFORMED CONDITIONS AND WHEN EXPECTATIONS WERE NOT
291 RECORDED. ERROR BARS REPRESENT +/- 1 STANDARD DEVIATION. LETTERS
292 INDICATE SIGNIFICANTLY DIFFERENT RATINGS WITHIN THE CONDITION.

293

294 Expectations:

295 The expected liking ratings of the private and premium food retailer brands were not
296 significantly different from one another (p=1.000) but both were expected to be significantly

297 better than the everyday ($p<0.001$ for both private and premium) and discount ($p<0.001$ and
298 $p=0.004$ for private and premium respectively) food retailer brands (Figure 2). Expected
299 liking for the everyday and discount food retailer brands were not significantly different from
300 one another ($p=0.561$).

301 Blind conditions:

302 In both Blind conditions (expectations recorded and expectations not recorded), the private
303 brand chocolate was significantly better liked ($p=0.011$ and $p=<0.001$ respectively) than the
304 premium food retailer chocolate which was the least liked. The everyday and discount food
305 retailer chocolates were not significantly different from another ($p=1.000$ and $p=0.799$) but
306 were significantly less liked than the premium food retailer chocolate and were significantly
307 better liked than the discount food retailer chocolate when expectations were not recorded.

308 Informed conditions:

309 The private brand chocolate was significantly better liked than the other 3 food retailers' own
310 brand chocolates whether expectations were recorded ($p\leq0.001$ for all 3: premium, everyday
311 and discount) or not ($p<0.001$ for all 3). The premium food retailer chocolate was
312 significantly less liked than the other 3 chocolates when expectations were not recorded
313 ($p<0.001$ private brand; $p=0.017$ everyday and $p=0.035$ discount) but was not found to
314 significantly differ from the everyday ($p=1.000$) and discount ($p=1.000$) chocolates when
315 expectations were recorded.

316 The disconfirmation and response shifts observed in the 2 studies are presented in Table 3.

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TABLE 3: DISCONFIRMATION AND RESPONSE SHIFT FOR THE 4 BRANDS WITH AND WITHOUT RECORDING EXPECTATIONS.

	Expectations recorded (n=71)		**Expectations NOT recorded (n=81)**
	Disconfirmation (E-B)	*Response Shift (I-B)*	*Response Shift (I-B)*
Private	0.87 (p=0.001) ***Sig disconfirmation***	0.59 (p=0.009) ***Sig Response Shift Assimilation***	0.28 (p=0.086)
Premium	1.62 (p<0.001) ***Sig disconfirmation***	0.17 (p=0.485)	-0.10 (p=0.675)
Everyday	0.00 (p=1.00) ***Confirmation***	0.08 (p=0.712)	-0.31 (p=0.084)
Discount	0.49 (p=0.067) ***Confirmation***	0.04 (p=0.881)	0.049 (p=0.764)

A significant disconfirmation (Table 3) was observed for the private and premium brands which both generated higher hedonic expectations than the actual experience. However, these disconfirmations only translated into a significant response shift (assimilation) for the private brand chocolate. In contrast to the private and premium brands, the expectations of the everyday and discount food retailer chocolates were well aligned with the actual hedonic experience in blind conditions and no significant disconfirmation was observed. When expectations were not recorded prior to the informed testing, a slight increase in the informed condition hedonic rating compared to the blind testing condition was also noted for the private brand chocolate however this did not quite reach statistical significance (p=0.086).

4. Discussion

A hierarchy in expected quality of food retailers' own brands was observed, in particular the premium food retailer product was expected to perform as well or better than the everyday and discount food retailer products; this hierarchy of food retailers' own brands is a feature which was also noted among Catalan consumers (Guerrero *et al.* 2000). The consumers' shopping habits appeared to modulate expectations; in particular, for consumers who predominantly shop at discount supermarkets the discount brand performed as well as the premium food retailer brand. However, it is not possible to establish causality between

expectations and shopping habits from this data set, nor is it possible to speculate on the relative influence of effective retailer communication strategies and consumer product knowledge in this study. It is clear from market data and industry analyst reports that discount supermarkets are undertaking significant effort to position themselves and their products as viable alternatives to both private and supermarkets own brands (premium and everyday). Discount supermarket brand adverts and marketing communications over the previous few years have emphasized a clear value proposition around equivalent product quality at a significantly lower price (see LIDL and ALDI advertising campaigns). These have clearly paid off with consumers expecting the same quality (or better) from the discount food retailer than the everyday food retailer. Although the communication strategies of the retailers cannot be ignored (IPA 2016; Times100 2016), other factors are in play in shifting consumer perceptions of discount supermarket brands and their product quality, such as stories circulated within the media and consumers sharing positives experiences about discount brands (Beresford and Hirst 2016). The same can be said for the communication efforts and approaches of the brands, particularly within the premium positioning. By all means literature exists that explores the role that brand communications and advertising play in the positioning of luxury food retail brands and products, as well as the interplay between culture and communications (Tresidder 2010). Therefore to establish the link between the retailers positioning and communication strategies and the perceptions of OLSBs further studies ought to identify the ways in which the media and stores communications impacts upon expectation and sensory experience.

The private brand chocolate performed better than the food retailer brand chocolates in blind conditions. Although, these results cannot be generalized to all product categories and ranges, it is worth noting that the pervasive notion that own label brands are of lower quality (Cotes-Torres *et al.* 2015; Li *et al.* 2015) appears to be borne out in this particular instance.

366 Observing significant response shifts for some rather than all of the samples presenting
367 significant disconfirmation has been reported before (Table 1). The reasons evoked, albeit
368 briefly revolved around the impact of product image (Lange *et al.* 2002) and brand popularity
369 (Varela *et al.* 2010). The fact that partial assimilation was observed in the expectation
370 measured condition for the private brand and not for the premium food retailer brand
371 indicates that assimilation is not only driven by the initial level of expectation. Indeed, it may
372 be partially driven by the magnitude of the difference between expectation and experience. In
373 this case, the disconfirmation was less pronounced for the private brand chocolate than the
374 premium food retailer chocolate; it is possible that large disconfirmation cannot be
375 assimilated and although contrast was not observed; our findings may be interpreted in the
376 context of the assimilation - contrast model (Anderson 1973). However, the response shift (or
377 absence of) may also be partially driven by other factors acting as moderating variables such
378 as shopping habits (unfortunately, this could not be tested due to small sample size in each
379 segment of shoppers) or brand image. In general, expected liking may be a poor proxy to
380 measure wholesomely brand image; in particular, the role of emotions have been highlighted
381 before (Li *et al.* 2015) and interactions with brand impact investigated (Schouteten *et al.*
382 2017). It is conceivable that the combination of branding and evocative sensory experience
383 generates distinct emotions for different brands of the same category of product. In particular,
384 incongruency between personal values and brand image has been shown to cancel out the
385 positive impact of brand familiarity (Paasovaara *et al.* 2012). Having discussed these
386 elements and although caution must be exercised not to over interpret these preliminary
387 results, there remains the possibility that the significant response shift observed for the
388 private brand when expectations were measured may be an artefact of the methodology used
389 and a direct consequence of asking panelists to rate their expected liking prior to the informed
390 testing. In contrast, the response shift observed in the condition where expectations were not

391 measured did not reach statistical difference. Participants may be unconsciously inclined to
392 rate their sensory experience in line with the expected liking rating they have just supplied in
393 a "self-induced suggestion bias" (a self-induced version of mutual suggestion error
394 (Meilgaard *et al.* 2006). In the absence of further evidence, a similar approach to that adopted
395 by Arcia *et al.* (2012) in which a period of several weeks was enforced between the
396 expectations and informed condition measurements may be advisable.

397 A wider range of product category (staple, luxury) should be considered in order to
398 generalize the findings as the impact of brands varies with product category, in particular,
399 opting for food retailers' own labels can be perceived as riskier when private brands are well
400 established (Li *et al.* 2015) as was the case in this study. Although there is some indication
401 that recording participants' expected liking prior to the informed hedonic testing may
402 influence the result of the latter; this would need to be investigated more systematically, in
403 particular using food items which present different degrees of disconfirmation.

404 ## 5. Conclusions

405 Food retailers from different tiers clearly generated different expectations from consumers
406 with respect to the quality of their products. While private brands are still expected to lead in
407 terms of product quality this study shows significant differences amongst consumer
408 expectations of OLSBs. Expectations for the premium food retailer were high and almost
409 matched those of the established, gold standard private brand whilst the everyday and
410 discount food retailers lagged behind. Despite this, the impact of branding on liking was only
411 modest with assimilation observed just for the private brand sample and only when
412 participants were required to record their expectations prior to the informed testing. Overall,
413 it is clear that consumer perception of OLSBs products are shifting, especially for food
414 retailers vying for the more affluent market, and in future could pose significant challenges to

private label food brands. What is more, as perceptions of OLSBs continue to align, it is paramount that food retailers increase their efforts to improve the perceived quality of their products and relative positioning of their brands. In this respect, alongside a focus on product development, food retailers need to continue communicating strong messages around product quality and value; especially if they wish to develop their brand images to match that of private labels.

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