

ALL NEW STUDY

# THE RISK OF PLAYING IT SAFE FOR CPG BRANDS

A strategy-first look at brand sameness, shopper behavior, and pricing power — and how bold CPG brands break the comparison trap.



BRANDON

# A 500-CONSUMER SURVEY REVEALS THE PENALTIES OF “PLAYING IT SAFE”

PRICE SHOPPING, PRIVATE LABEL SWITCHING, AND WEAKER PRICING POWER.

There’s an appealing trap in CPG marketing right now. It looks responsible. Optimized. Sensible. Safe.

And that’s exactly the problem.

For mid-scale CPG brands, “safe” has started to carry a hidden fee. Because the system keeps rewarding the same kind of safe: what’s trackable, comparable, and easy to defend.

## *The Shoppers We Listened To*

Sample Size **500 Respondents**

Primary Age Range **18-28 (18%), 29-39 (34%), 40-49 (23%), 50-59 (18%), 60-99 (8%)**

Gender Split **46% Male | 54% Female**

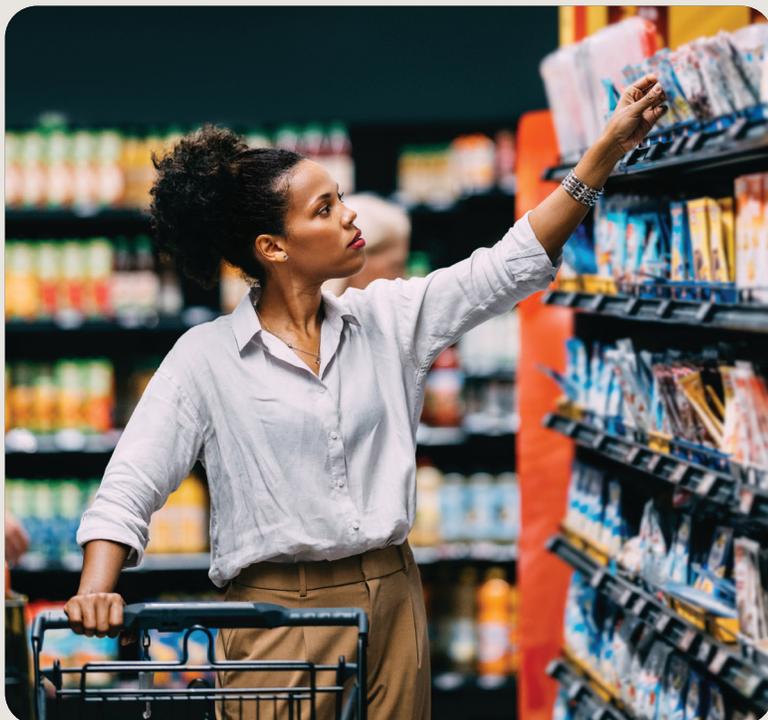


**BUDGETS FLOW TO WHAT CAN BE MEASURED.  
LEADERSHIP APPROVES WHAT CAN BE PROVEN.**

# RETAIL MEDIA REWARDS WHAT'S EASY TO OPTIMIZE.

So marketing gets careful.  
Packaging gets “category-correct.”  
And the kinds of bold moves that  
actually earn attention start to feel...  
irrational.

And when that happens, consumers  
don't reward your restraint. They  
punish it. Because when brands  
feel interchangeable, shoppers stop  
choosing and start calculating.



## THE REAL CRISIS

# MOST BRANDS ARE OPTIONAL

Here's the most uncomfortable finding in the entire study: a lot of brands don't matter nearly as much as we like to believe.

# WHY MOST BRANDS DON'T MATTER

When we asked consumers what percentage of brands they actually care about, **26%** said they care about **10%** or less.

Translation: for over a quarter of shoppers, roughly **90%** of brands could “go away,” and they wouldn't care.

That's the invisible tax mid-scale brands pay. If you're not a category leader with built-in familiarity or the insurgent with a sharp, memorable edge, you're competing in the dangerous middle, where shoppers are trading up or down against you.



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# SAMENESS FLIPS SHOPPERS INTO SHORTCUT MODE

We ran this first-party survey of 500 consumers to quantify what mid-scale marketers already feel: when a category starts to blur into sameness, the shopper's brain defaults to simple patterns.

In fact, 83.6% of shoppers said brands in a category sometimes, often, or almost always feel “basically the same.” For a huge chunk of the market, sameness isn't occasional — it's expected.

Once that happens, people don't compare, they price shop.



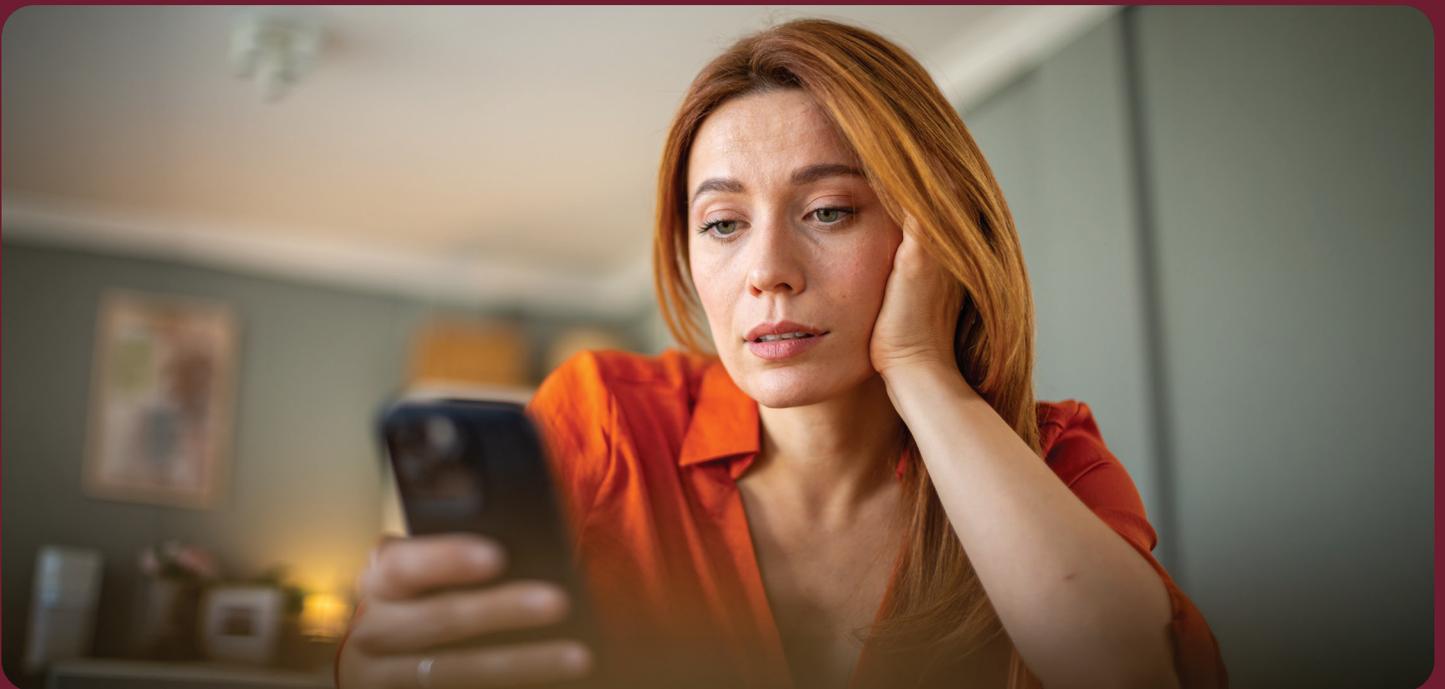
Consumers told us they do this consciously. When brands look and sound similar, 71% say they default to easy decision tools like price.

That's the safety tax: when you don't give people a reason to choose, you give them a reason to trade down.

# THE DIGITAL SHELF IS MAKING IT WORSE

The data points to something structural: the platform itself is compressing brands into sameness. 45% of consumers agree that retailer sites/apps make brands look more similar than they really are.

Because online, shoppers don't "experience" brands. They scan. And what do they scan first?



Price dominates (**62%**). Then ratings (**36%**). Then badges (**28%**). Packaging is further down the list, in stark contrast to their experience at retail.

The digital shelf optimizes for easy comparison and can compress brands into a tile, a star rating, and a promo tag. Which is why building demand beyond retail platforms remains critical.



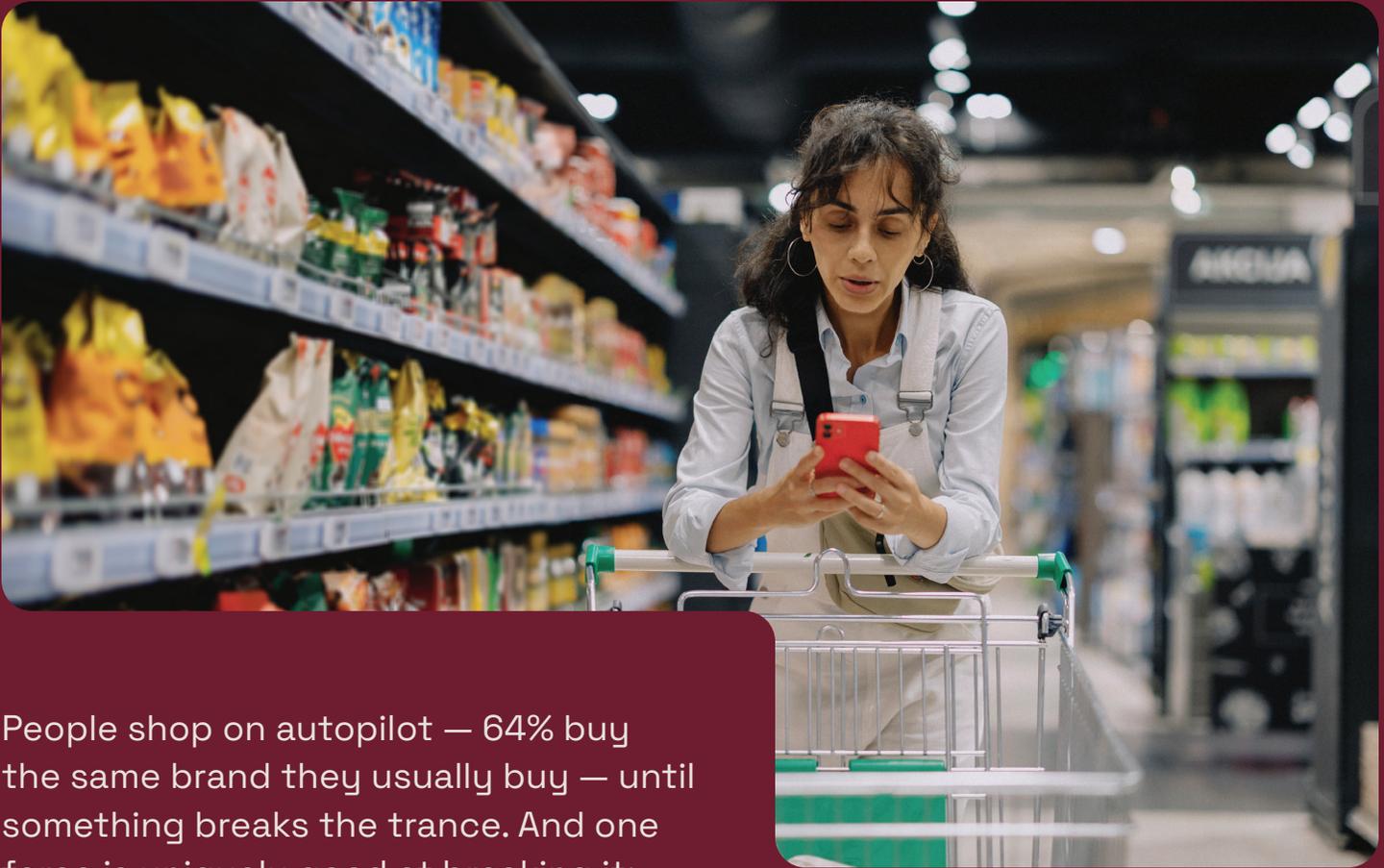
# ADS STILL MATTER (AND THE RETAIL SHELF STILL CLOSES)

There's a lot of belief in CPG that consumers are cold, rational, and relentlessly value-driven.

That story justifies safe work:

“Why take risks? People only care about price.”

**OUR DATA SUGGESTS SOMETHING MORE HUMAN.**



People shop on autopilot — 64% buy the same brand they usually buy — until something breaks the trance. And one force is uniquely good at breaking it: **advertising that’s memorable enough to plant preference before the shopper ever reaches the shelf.**

In our study, the **#1 influence** is still the shelf (**45%**). But advertising is right there: **42%** say a good brand commercial is one of their biggest influences.

And it’s not just influence — it’s discovery. When asked where they first hear and remember a brand, **46%** said at-shelf... but **44%** said a good commercial.

In other words, despite all the modern digital media options, a lot of what we used to rely on to build brands holds true: **the ad builds the bias; the shelf closes the deal.**

# PACKAGING DETERMINES VALUE AT RETAIL

Here's the data point that should wake up any CMO who isn't prioritizing good packaging:

## KEY MOVES

78% of consumers say they've bought a brand because the packaging felt bold or different. Not "noticed." Bought.

And when we asked why, the top reason was: **it felt premium or higher quality.** Other reasons were: **visually distinctive, honest/straightforward, and modern/newer.**

In most cases, at retail, packaging is a consumer's primary value signal.



## WHEN DIFFERENCE PAYS



# PREMIUM PERMISSION IS BIGGER THAN “10% MORE”

The most expensive myth in mid-scale CPG is that shoppers won't pay more.

### THE TRUTH

They will... if the difference feels meaningful.

Yes, 25% said they'd pay 10% more for a meaningfully different brand. But it doesn't stop there: 14% would pay 15% more, and 22% would pay 20%+.

Think of the retail shelf as your first date with the consumer. Lead with charm, back it with value.

# THE TAKEAWAY

This is a fight for preference in a system built for comparison.

Mid-scale CPG brands are being optimized into sameness, and sameness triggers shortcuts: deals, ratings, the biggest name, private label. So yes: **safe is risky**. Because safe makes you forgettable.

And forgettable brands don't set prices. They accept them.



# BRANDON ISN'T JUST IN THE CPG GAME. WE'RE IN THE STAND- OUT BUSINESS.

We build brands that escape the comparison trap.

Strategy that challenges categories. Creative that demands attention.  
And data that proves distinctiveness pays.

Because forgettable brands compete on price. Unforgettable brands set it.

Ready to stop blending in?

**LET'S TALK STRATEGY**

Hit the Inbox

Brandon.Agency | 843.916.2000

**FRICIONLAB**

RESOLVE TENSION. CREATE DEMAND.

**Where Buyer Resistance Becomes Brand Demand**

This report was authored by **FrictionLab**, Brandon's dedicated strategy and research team. Friction is the silent killer of growth—it's the invisible drag that burns through marketing dollars. While others rely on syndicated data, FrictionLab uses first-party research and behavioral science to uncover why shoppers hesitate. We find what's holding your buyers back and turn those insights into strategies that unlock unstoppable growth.

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