

KANTAR WORLDpanel High definition inspiration

## The Irish Shopper Landscape

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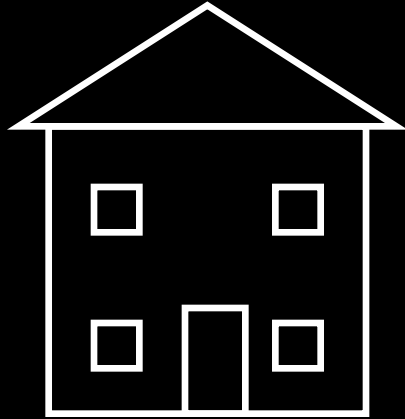
KANTAR WORLDpanel High definition inspiration

-€600

# KANTAR WORLD PANEL

- World leader in understanding Consumer & Shopper Behaviour
- What people buy, how they use it & why
- Expertise base on hard, quantitative evidence
- 40 years experience in 50+ countries
- Our aim is to help our clients to identify & capture growth

2008



Shop 241 Times

**+4%**

Within 6.5 Different Stores

**+7%**

Full Store Trolley Missions

**-9%**

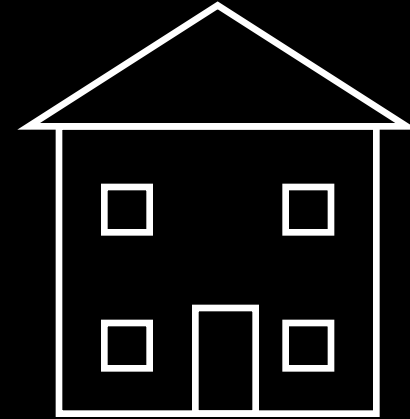
Spend €25.6 Each Time

**-13%**

Adding to €6,172 on Groceries

**-10%**

2010



Shop 250 Times

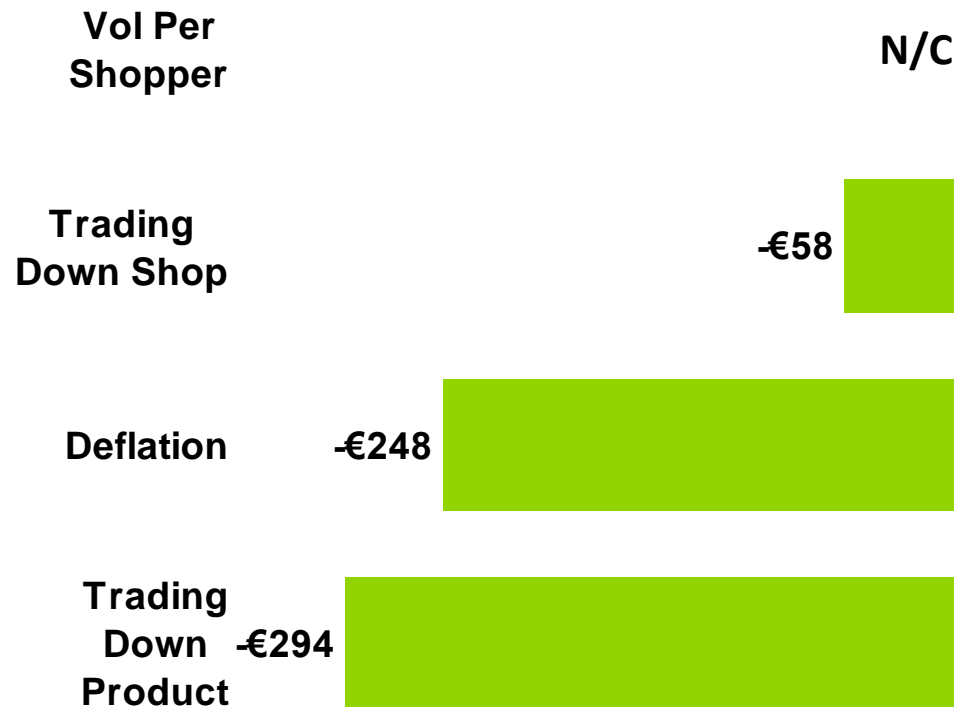
Within 6.9 Different Stores

Top Up Baskets

Spend €22.3 Each Time

Adding to €5,572 on Groceries

# how have shoppers cut back to save this €600?





Dec 09 =  
20% HH's



Discounter  
growth

Peak share of  
9.6% latest  
quarter

Shopper promiscuity has  
put more focus on offers



All stores have  
pushed Own Brand



**The recessionary environment has been tough for suppliers & retailers**

**We have had to fight short-term promiscuity to hold on to our shoppers**

**Longer-term brand building has taken a back seat**



A wide-angle, low-perspective shot of a two-lane asphalt road that stretches straight into the distance. The road is flanked by dry, scrubby vegetation and dirt shoulders. In the far distance, a range of low mountains is visible under a clear blue sky with a few wispy clouds. The word "GROWTH" is superimposed in white, sans-serif capital letters in the center of the image, positioned above the horizon line.

GROWTH



# THE IRISH TIMES September 9<sup>th</sup> 2010

## First annual inflation rise in 2 years



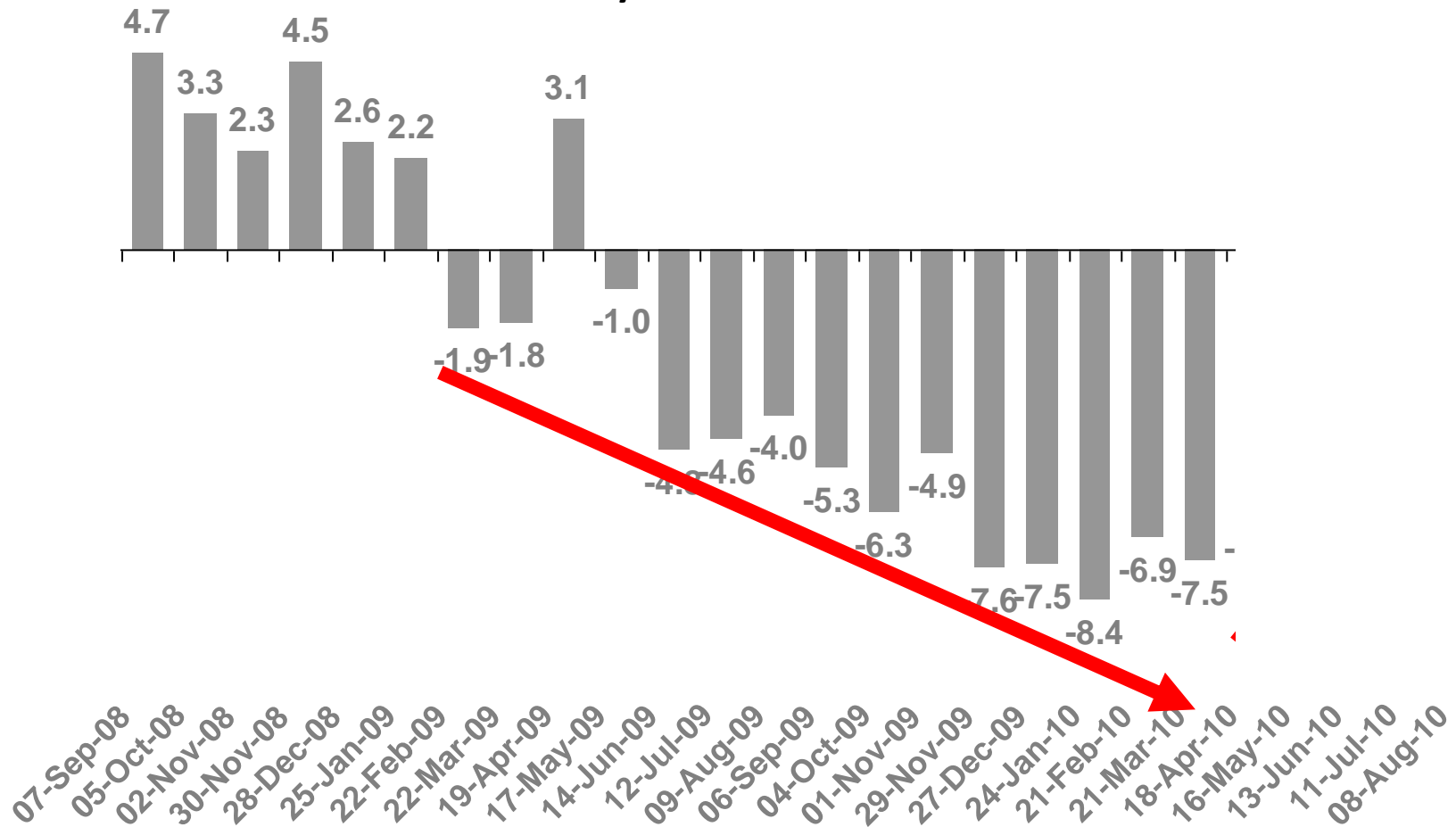
Consumer prices show a slight increase last month

JASON MICHAEL

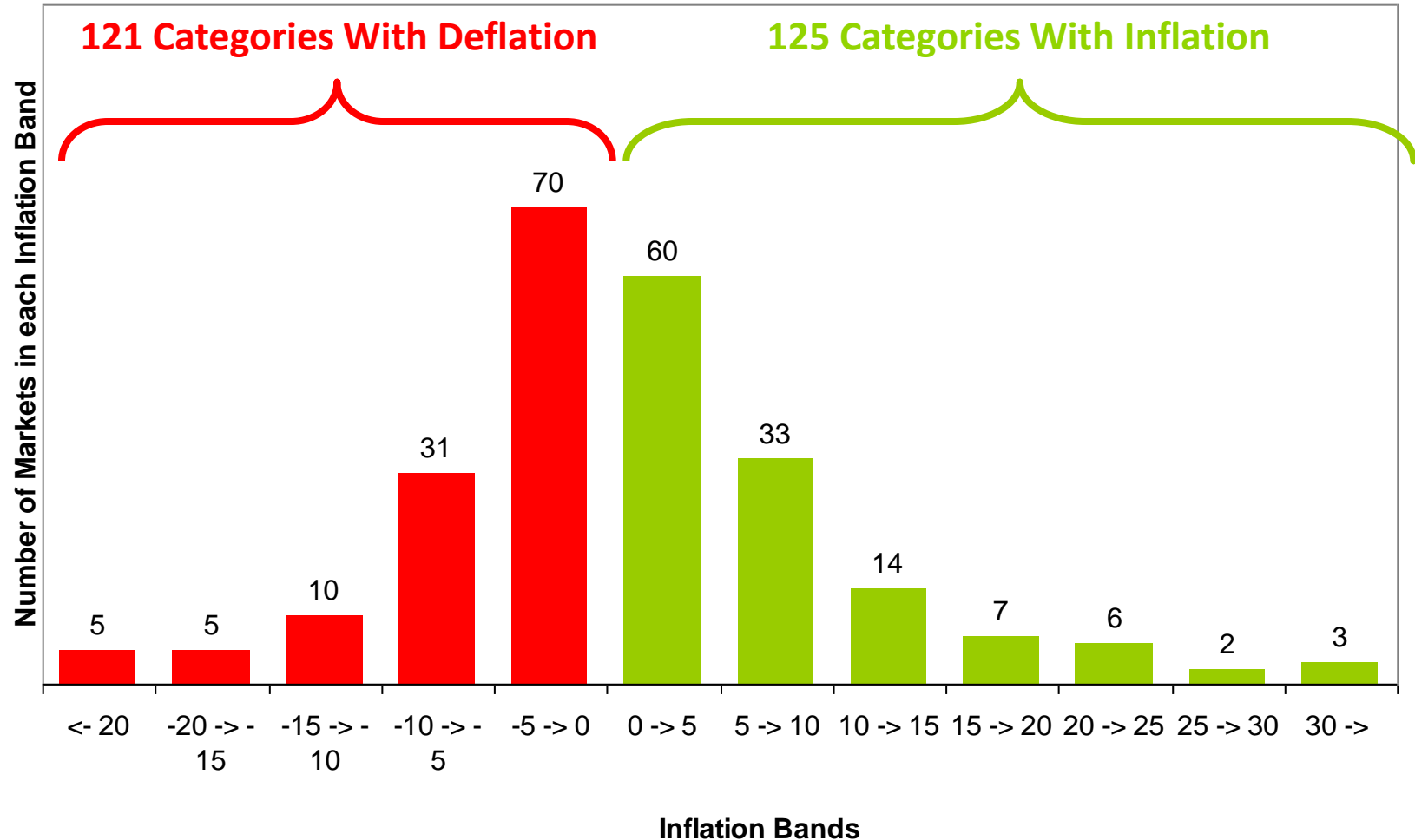
Consumer prices show a slight increase last month but were also up 0.2 per cent on an annual basis, the first such rise in two years, according to Central Statistic Office figures published today.

# HOW HAS THIS IMPACTED THE GROCERY MARKET?

4 weekly trended YoY Growth

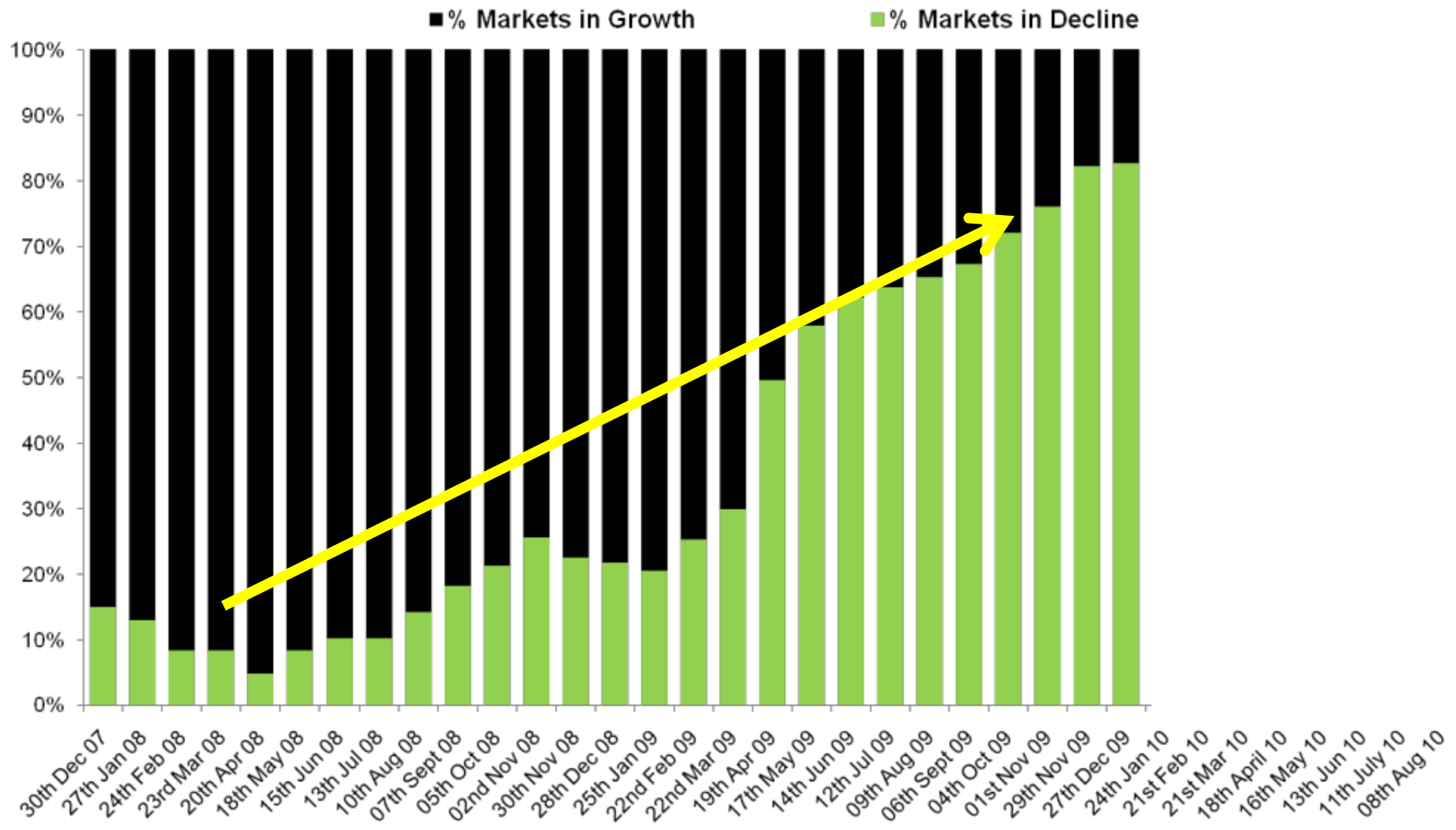


# WE NOW HAVE MORE CATEGORIES WITH PRICES GOING UP



12 w/e 08 Aug 2010

# VALUE GROWTH IS NOW A REALISTIC TARGET



12 w/e 08 Aug 2010

# SOME OF THE CATEGORIES DRIVING A RETURN TO GROWTH



In home  
treats

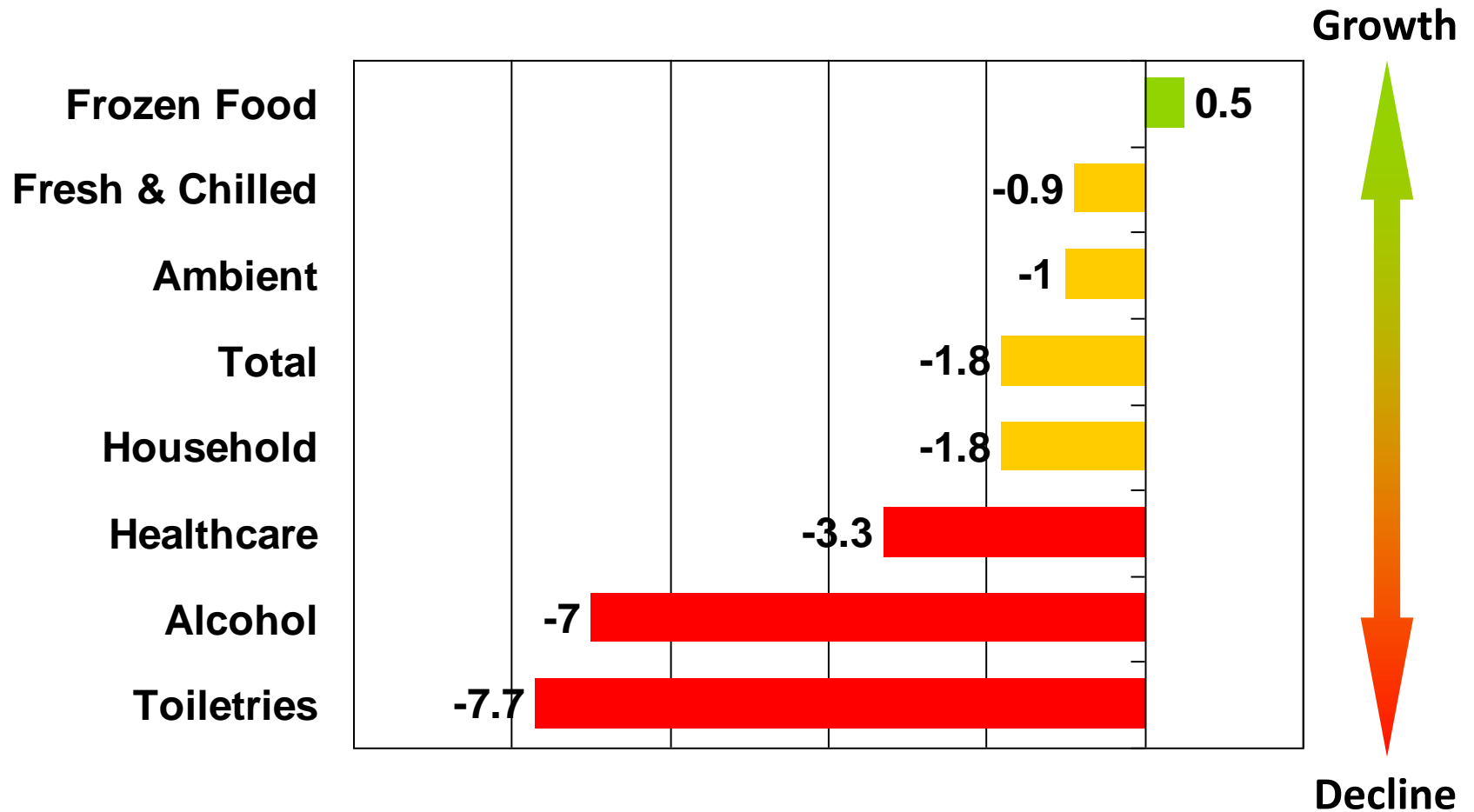
More ethnic  
occasions

‘Value’  
convenience

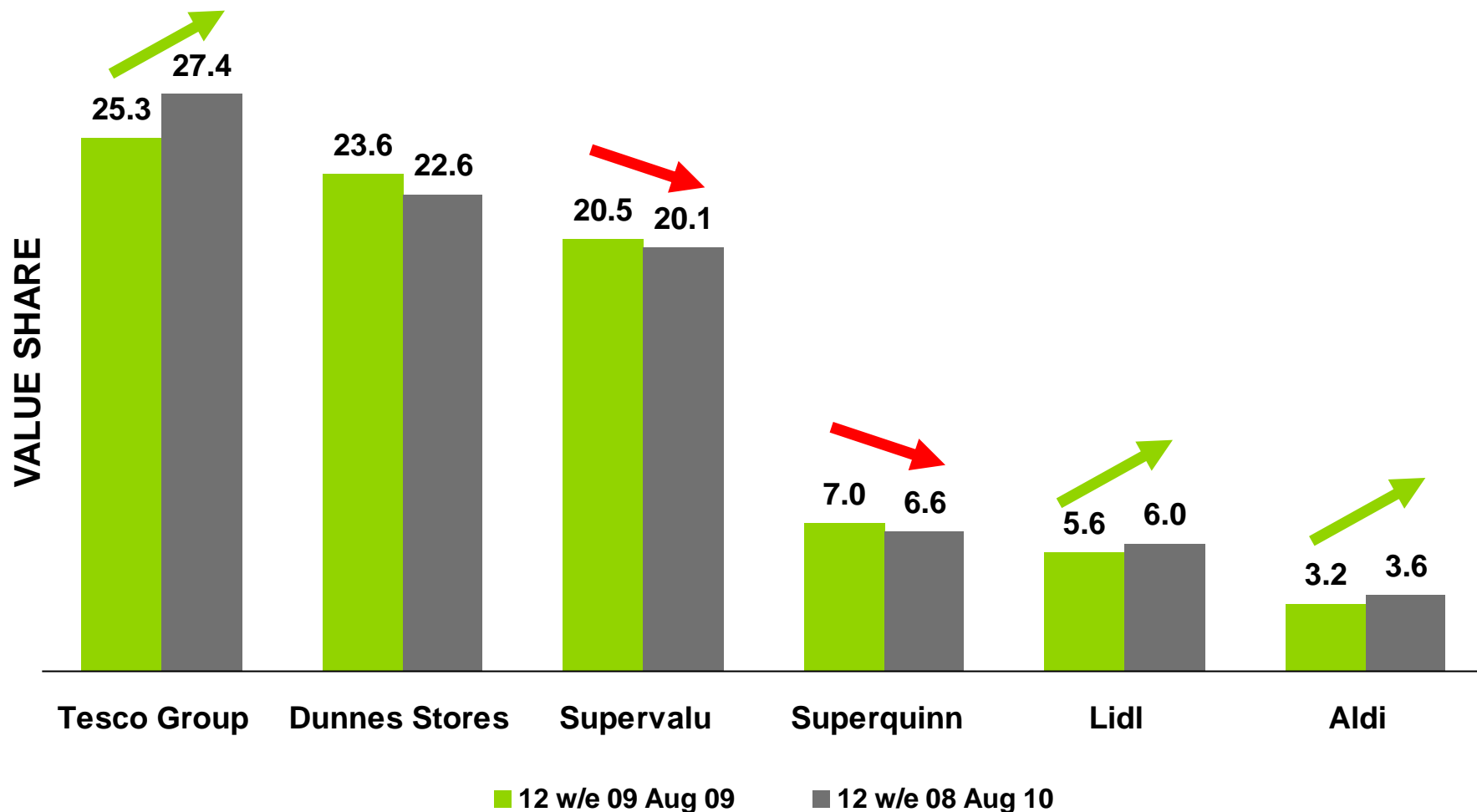
Family  
enjoyment



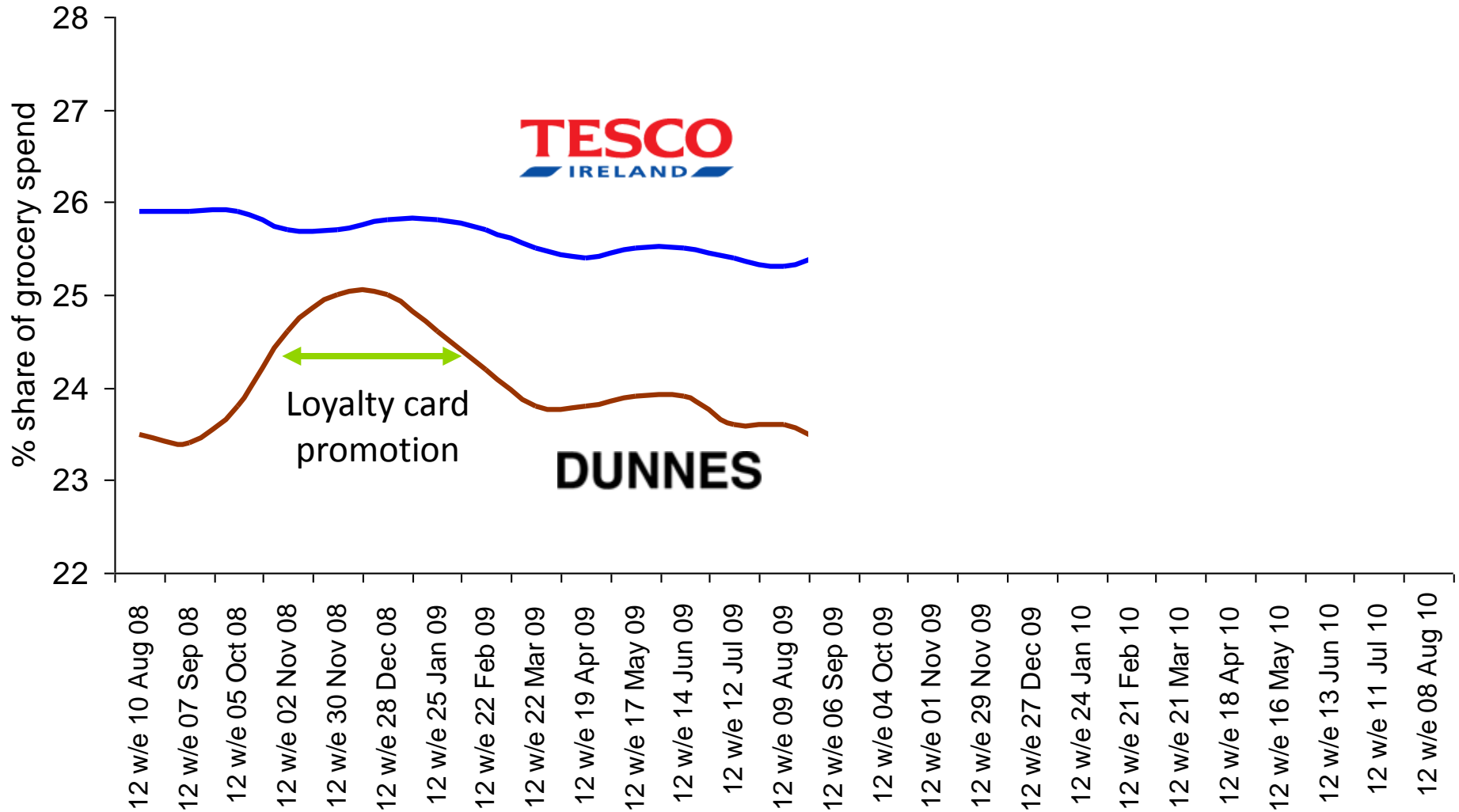
# FROZEN FOOD IS THE FIRST MACRO GROWTH AREA



# RETAILER WINNERS & LOSERS



# Tesco have really hit the accelerator pedal since late 2009



# WHAT'S DRIVING TESCO GROWTH?



€2.5M €6.3M €2.6M



**ASDA**

Sainsbury's



**DUNNES STORES**



**SuperValu**  
Real Food, Real People

**This is Lassie**



**This lassie is  
less loyal...**

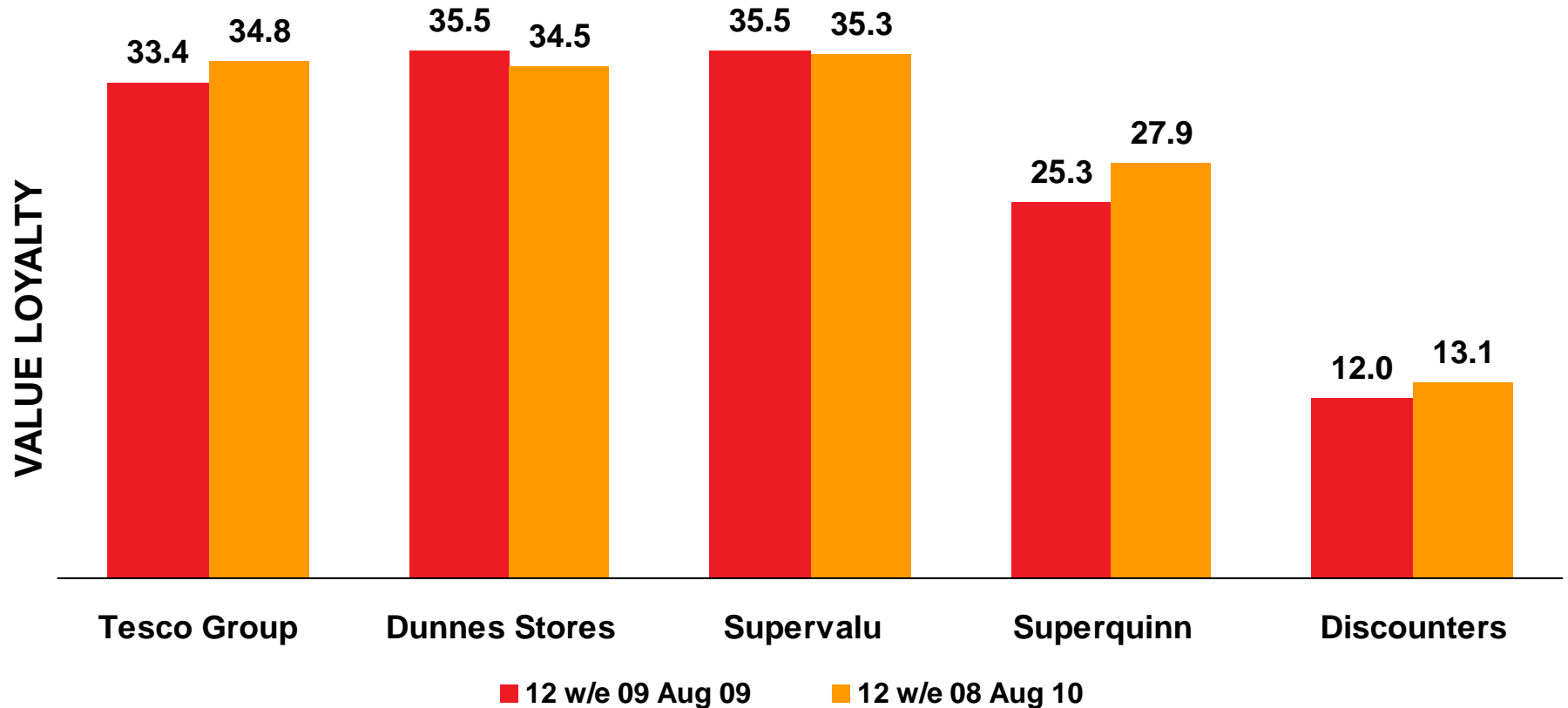


**Loyalty is a  
key driver of  
performance**

**Lassie is loyal**



## THREE OF THE MAIN 5 RETAILERS INCREASE LOYALTY



Metro , 15<sup>th</sup> July 2010

**Tesco to create  
750 jobs with  
€113 million  
investment across  
7 new stores**



Winning regionally is also strategically important

# DUNNES STORES

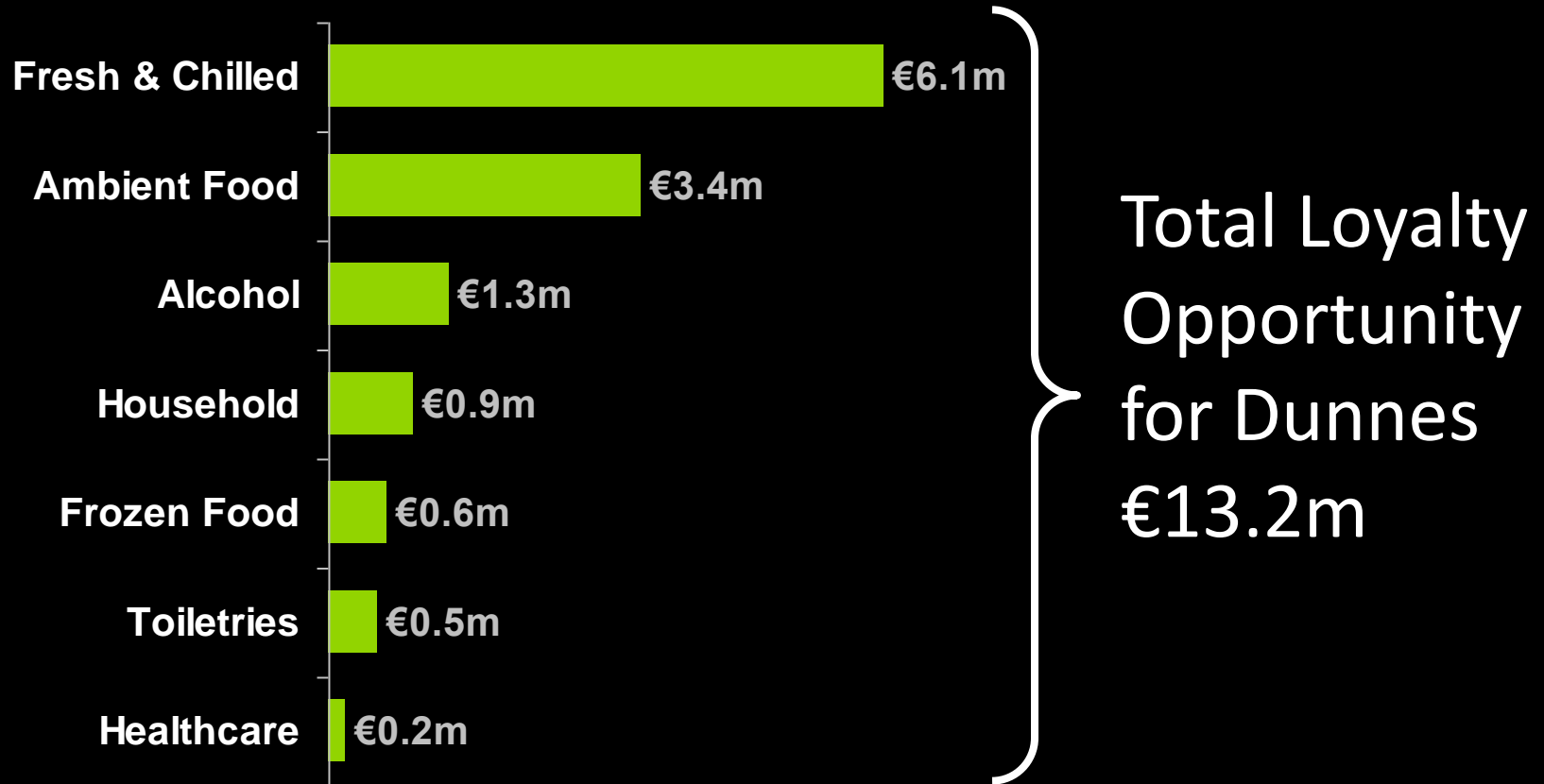
*Better Value!*

Increasing 12 w/e loyalty by 1% back  
to 35.5%...

+€13.2m

# Where is this likely to come from?

## Size of loyalty opportunity by trading area



Value of +1% loyalty to Dunnes by area

So  
WHAT?

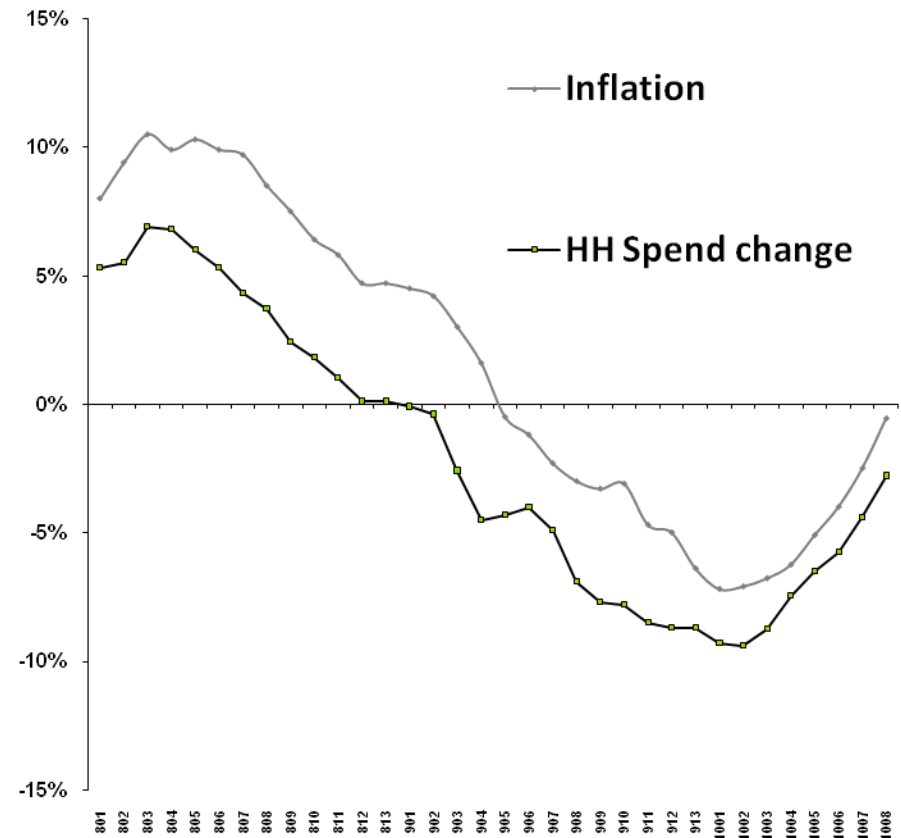


# Value erosion has halted with signs now of a slow road to recovery




The agenda will now turn to the building blocks within store to fuel this momentum

# Back to black in Ireland as we progress through 2010



# Shopper loyalty now increasing for the larger multiples as shopping around stagnates



*Building blocks  
will naturally  
differ by retailer*

**How can your  
brands generate  
loyalty within the  
category, as a  
building block for  
the store overall**

# **Basket size** now growing again in 2010 as shoppers favour bigger baskets



More focus on planned, versus spontaneous grocery shopping. More favourable environment for larger pack sizes.

**+€600**