

KANTAR WORLDpanel High definition inspiration

GB State of the Nation
Bord Bia – Dublin – September 16 2010

Edward Garner
Communications Director



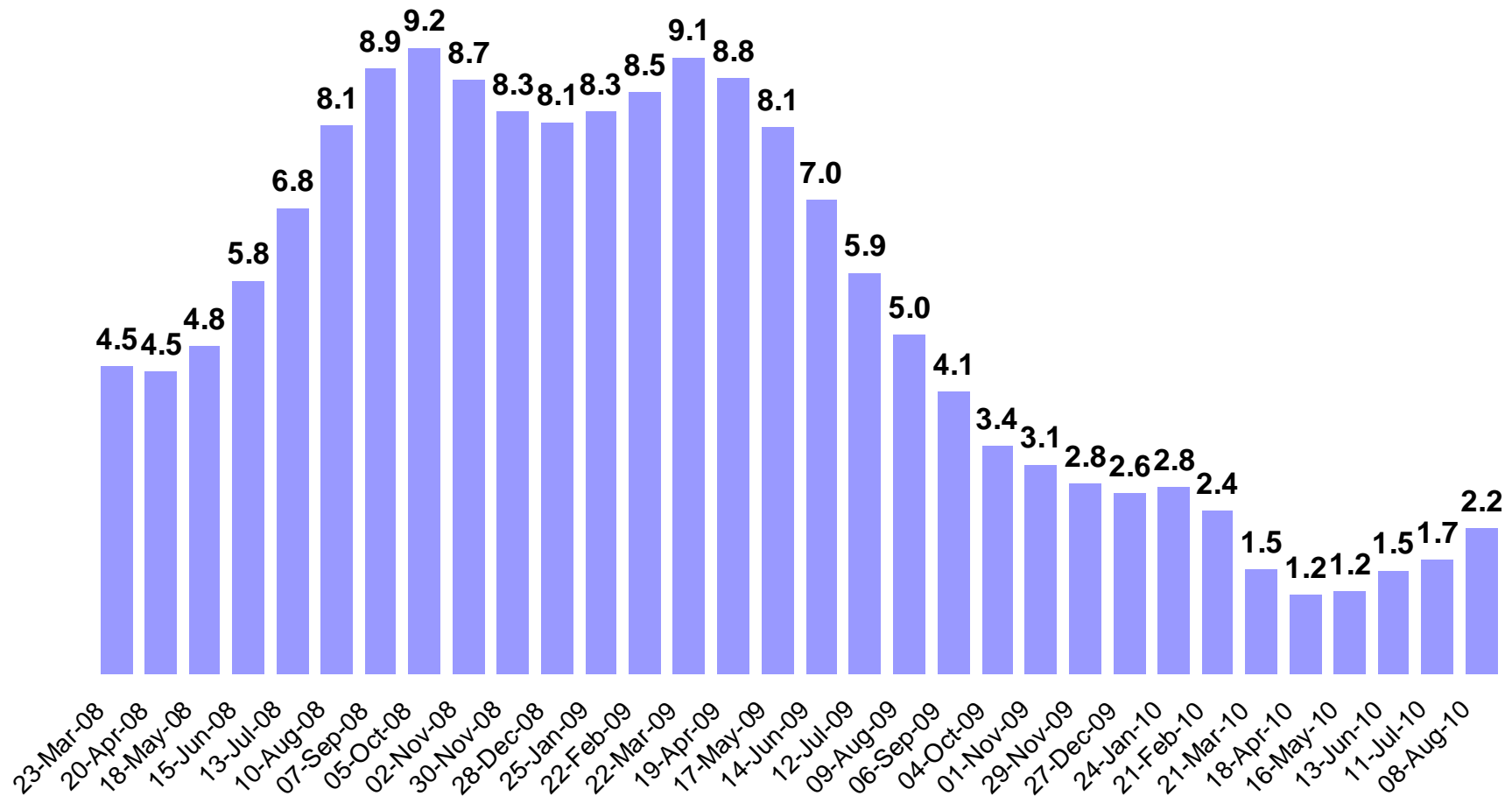
The Agenda

- > – A sense of proportion returns
 - Tesco – Never complacent
 - Asda – Price and/or Quality
 - Sainsbury's – Striking a Balance
 - Morrisons – 'Fresh for less'
 - Waitrose – Ethical extremism
 - Discounters – Threat postponed
 - M&S – Always the Bridesmaid
 - Home Delivery



Grocery Price Inflation – Kantar Worldpanel Calculation

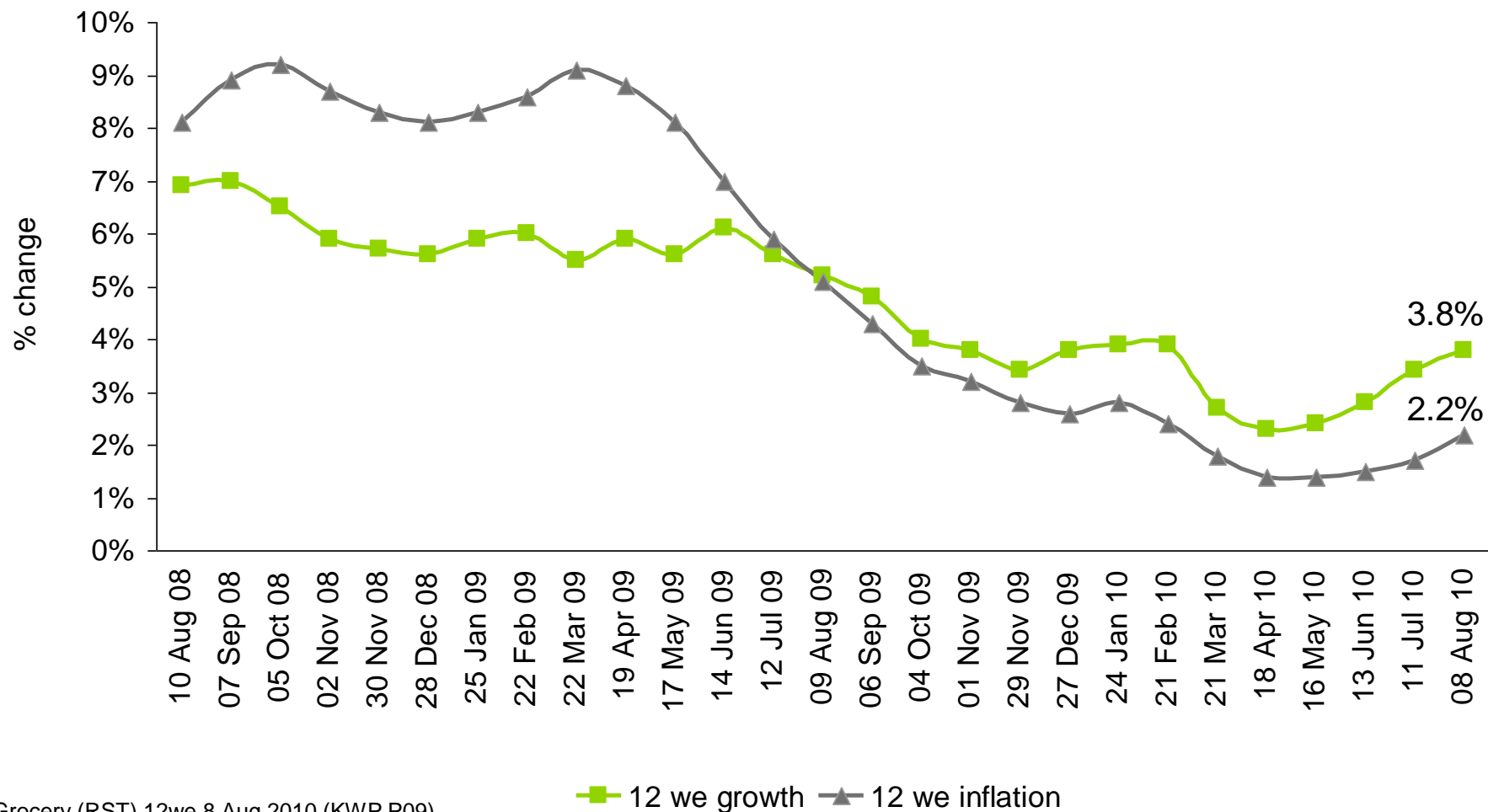
12 w/e periods year-on-year



Based on year-on-year comparisons of price paid for over **75,000** identical products including promotions and in the proportion that British households are purchasing them

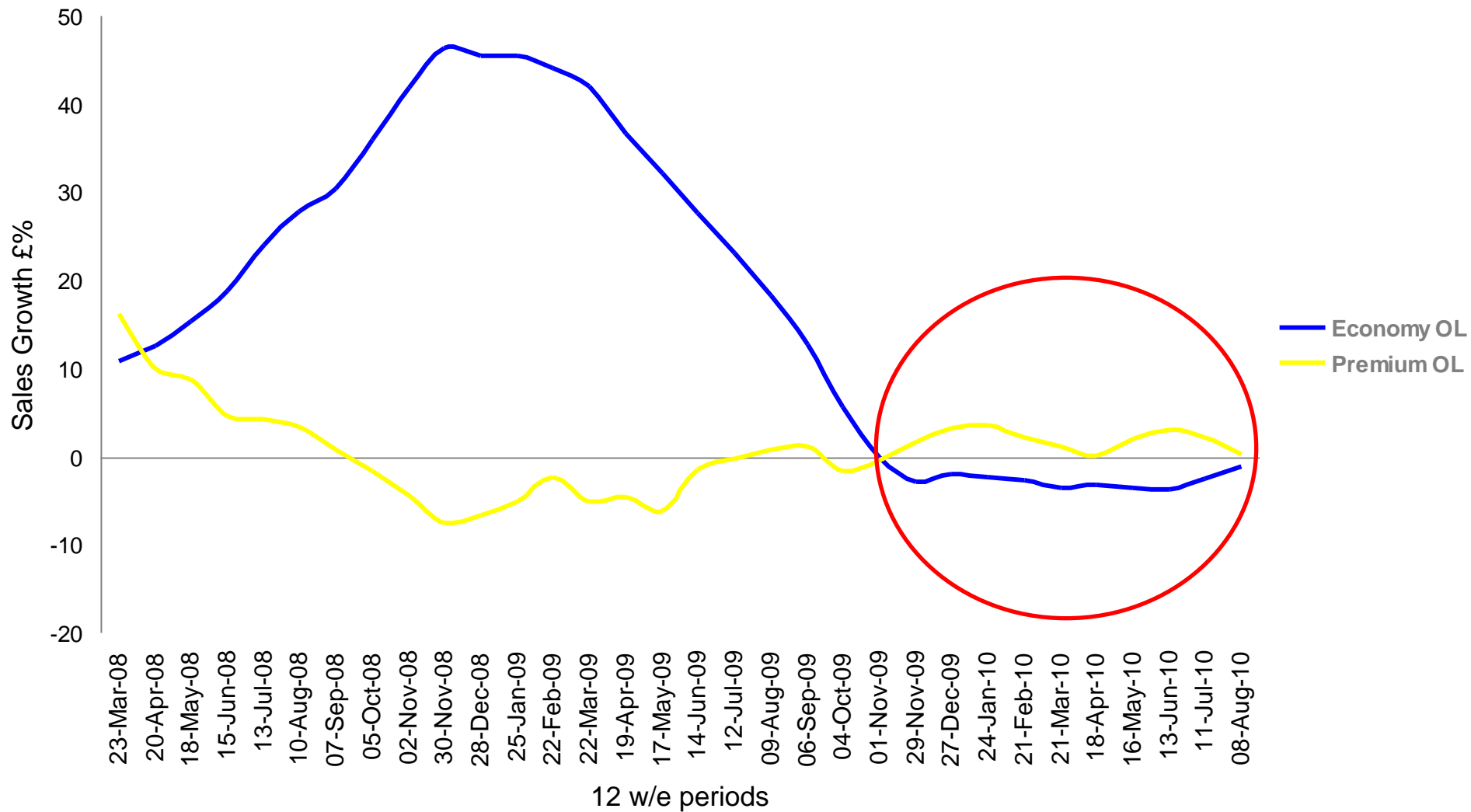
Market Growth & Inflation

Growth continues to increase as inflation rises to 2.2%



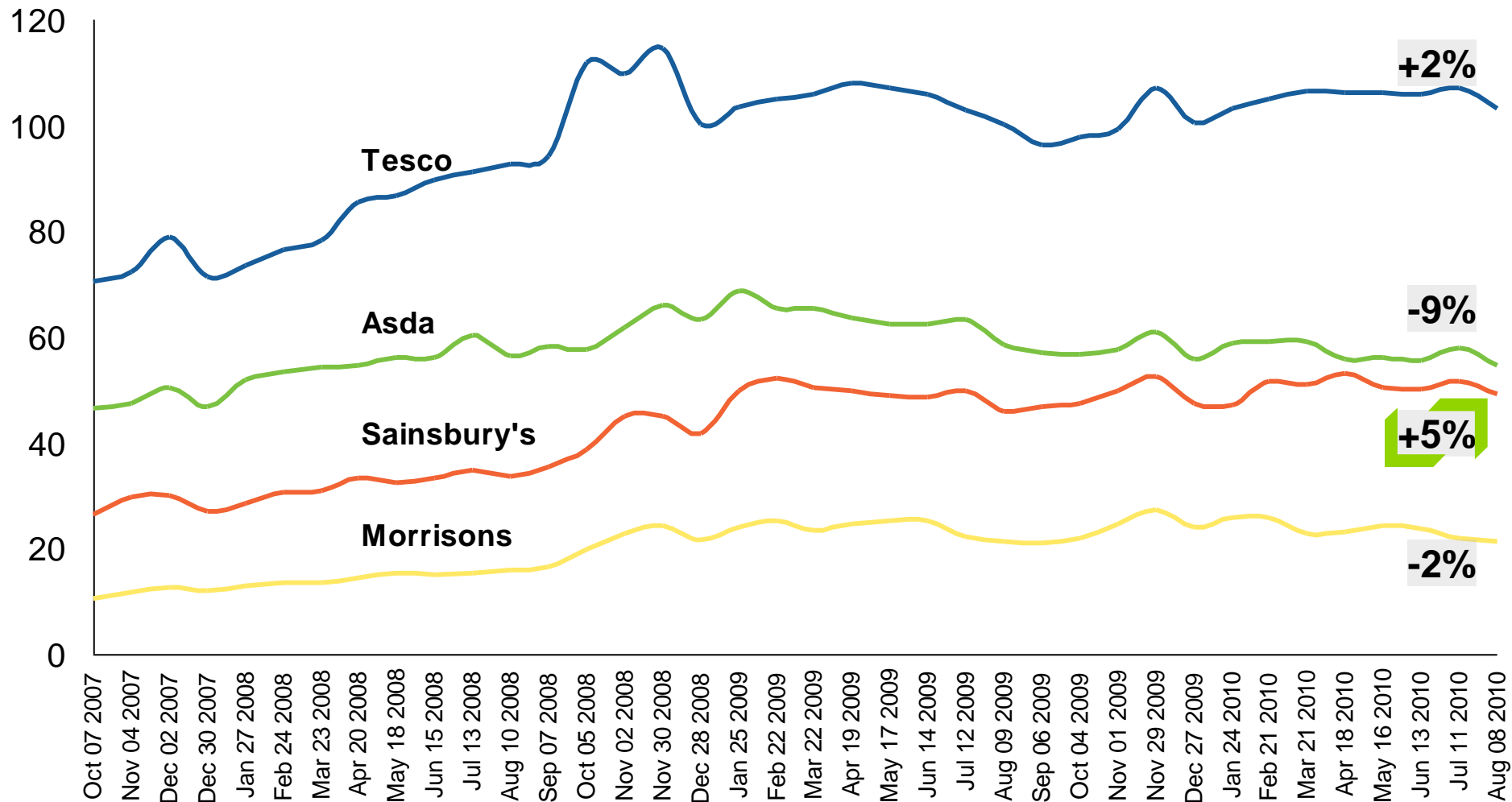
Grocery (RST) 12we 8 Aug 2010 (KWP P09)

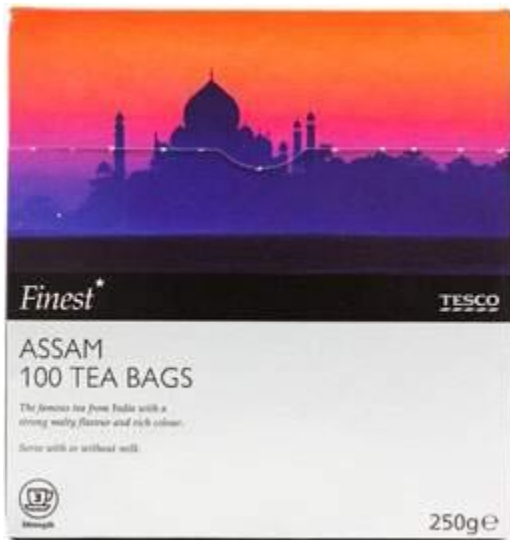
Total Grocers Year-on-Year £% Changes





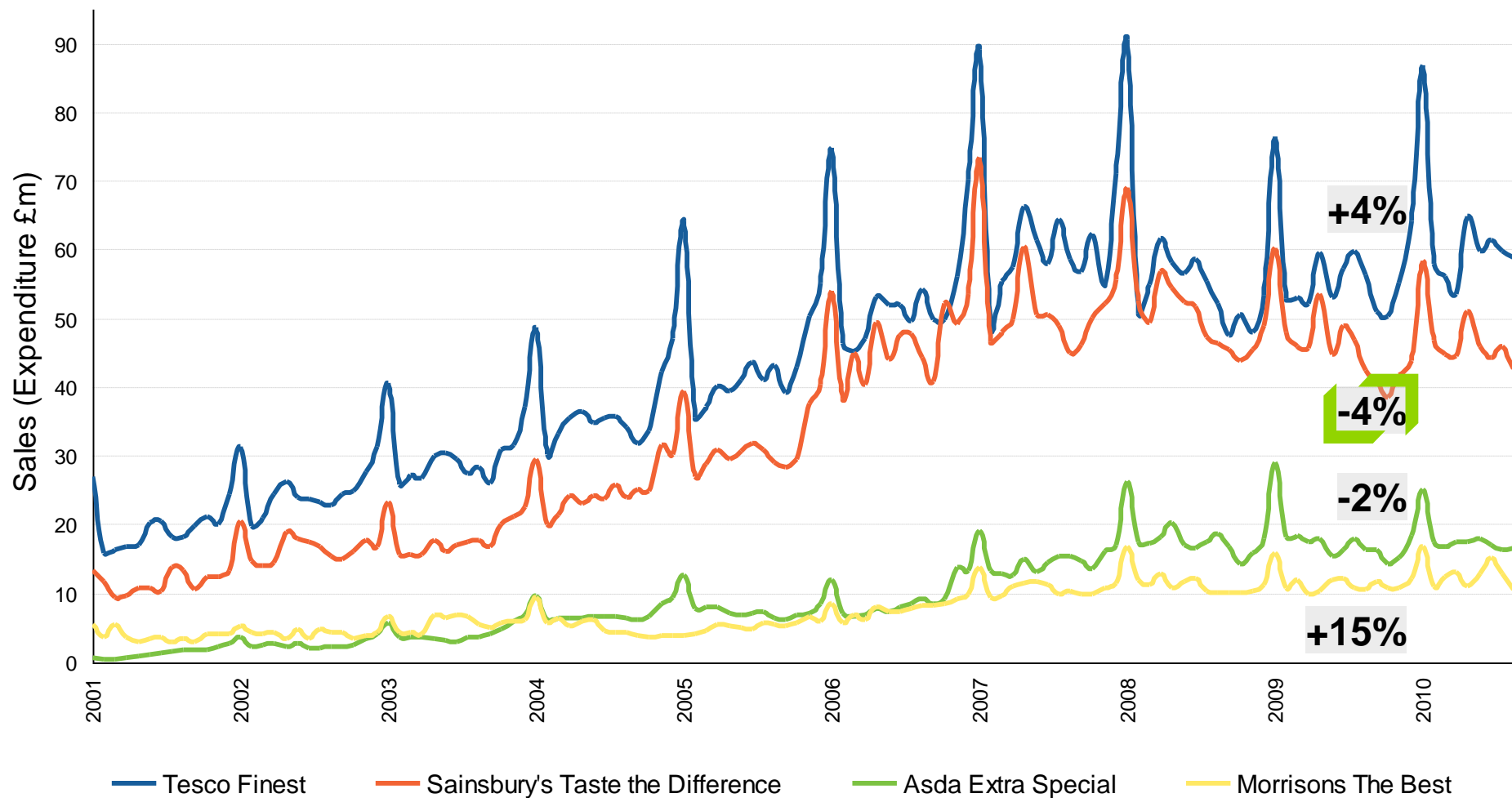
Total Grocery Budget Own Label Trends - 4-weekly £m





Premium Own-Label Sales Trends

Latest 12-wk % Change

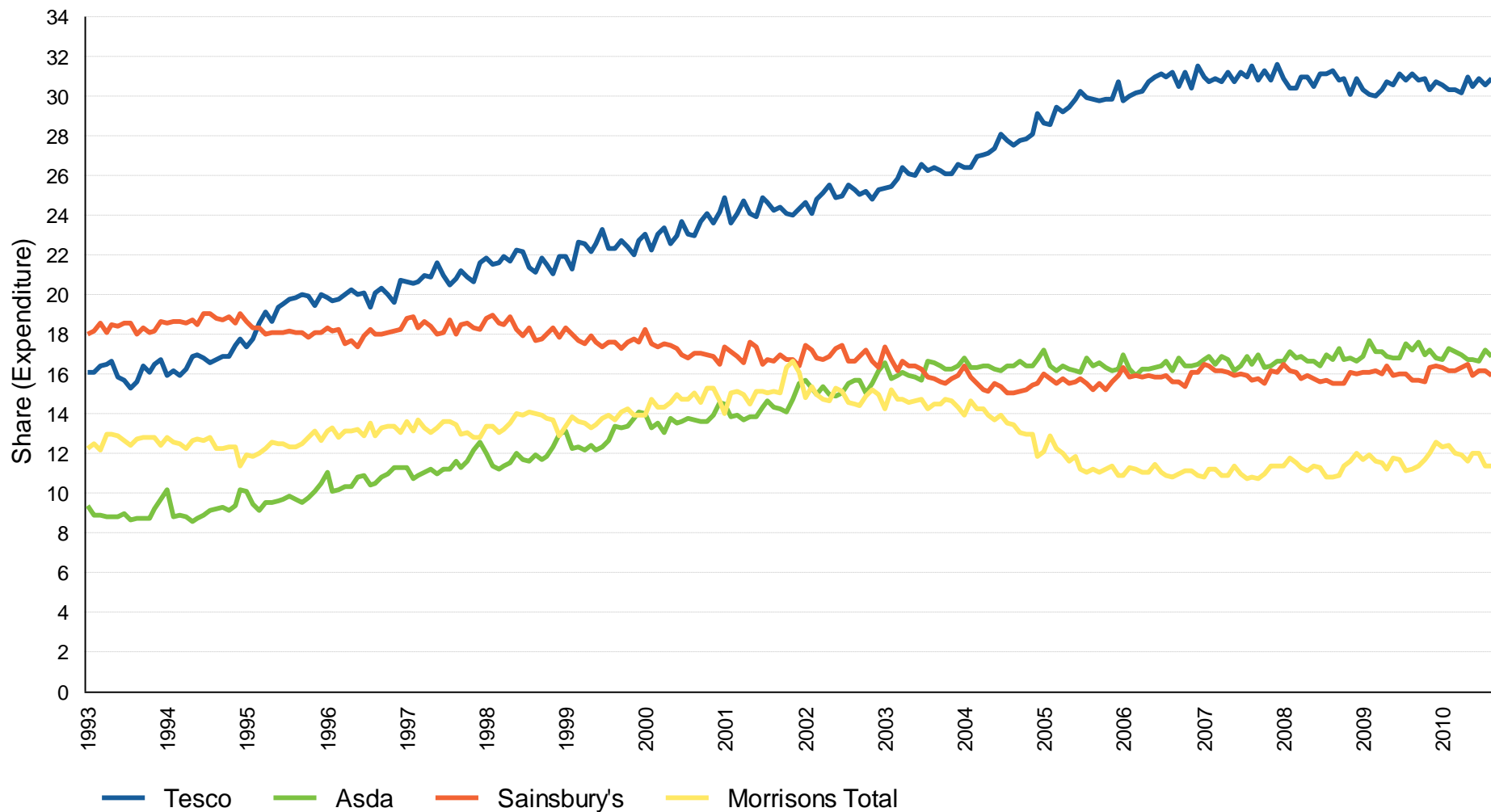


The Agenda

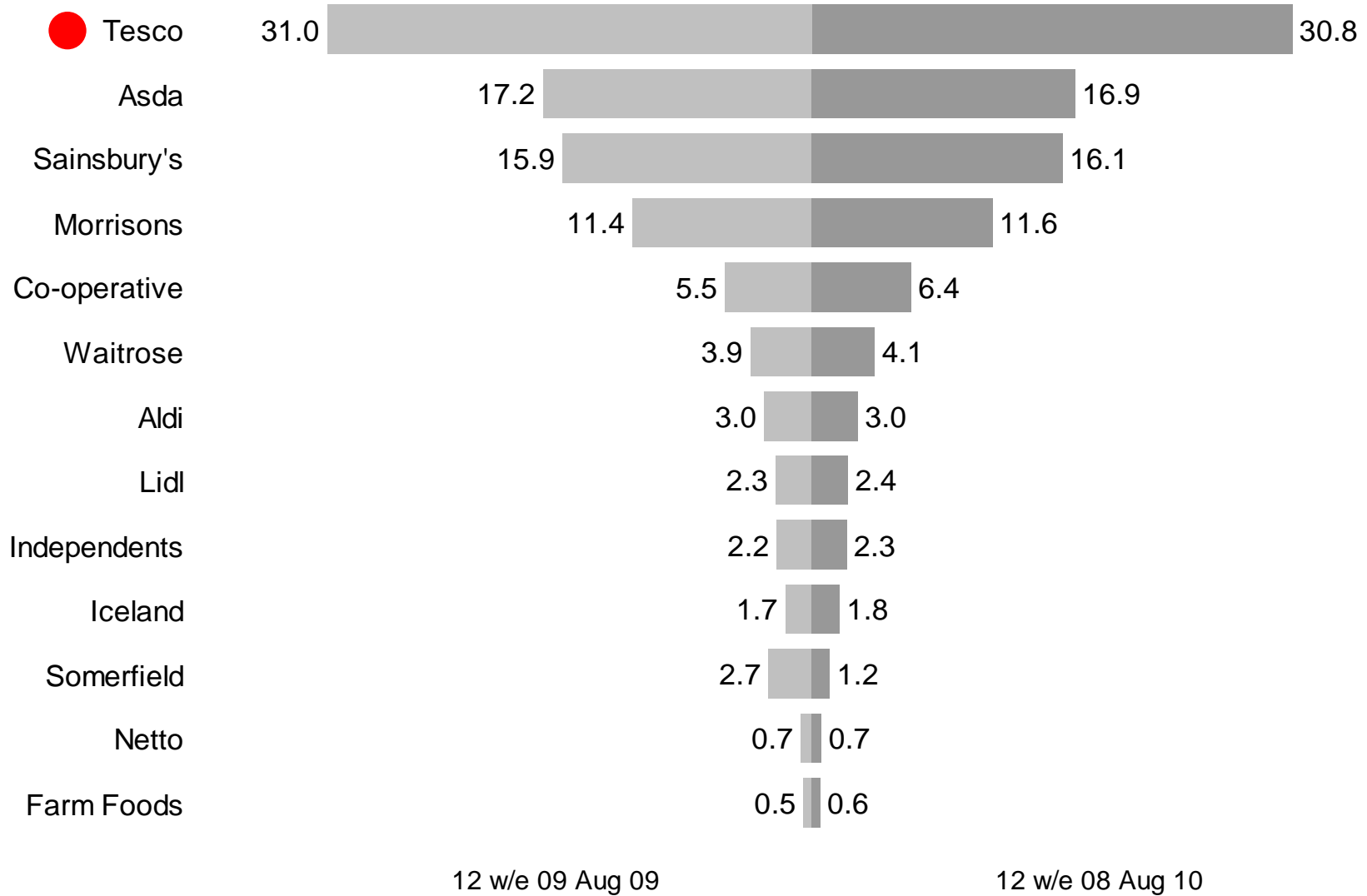
- A sense of proportion returns
- – Tesco – Never complacent
- Asda – Price and/or Quality
- Sainsbury's – Striking a Balance
- Morrisons – 'Fresh for less'
- Waitrose – Ethical extremism
- Discounters – Threat postponed
- M&S – Always the Bridesmaid
- Home Delivery



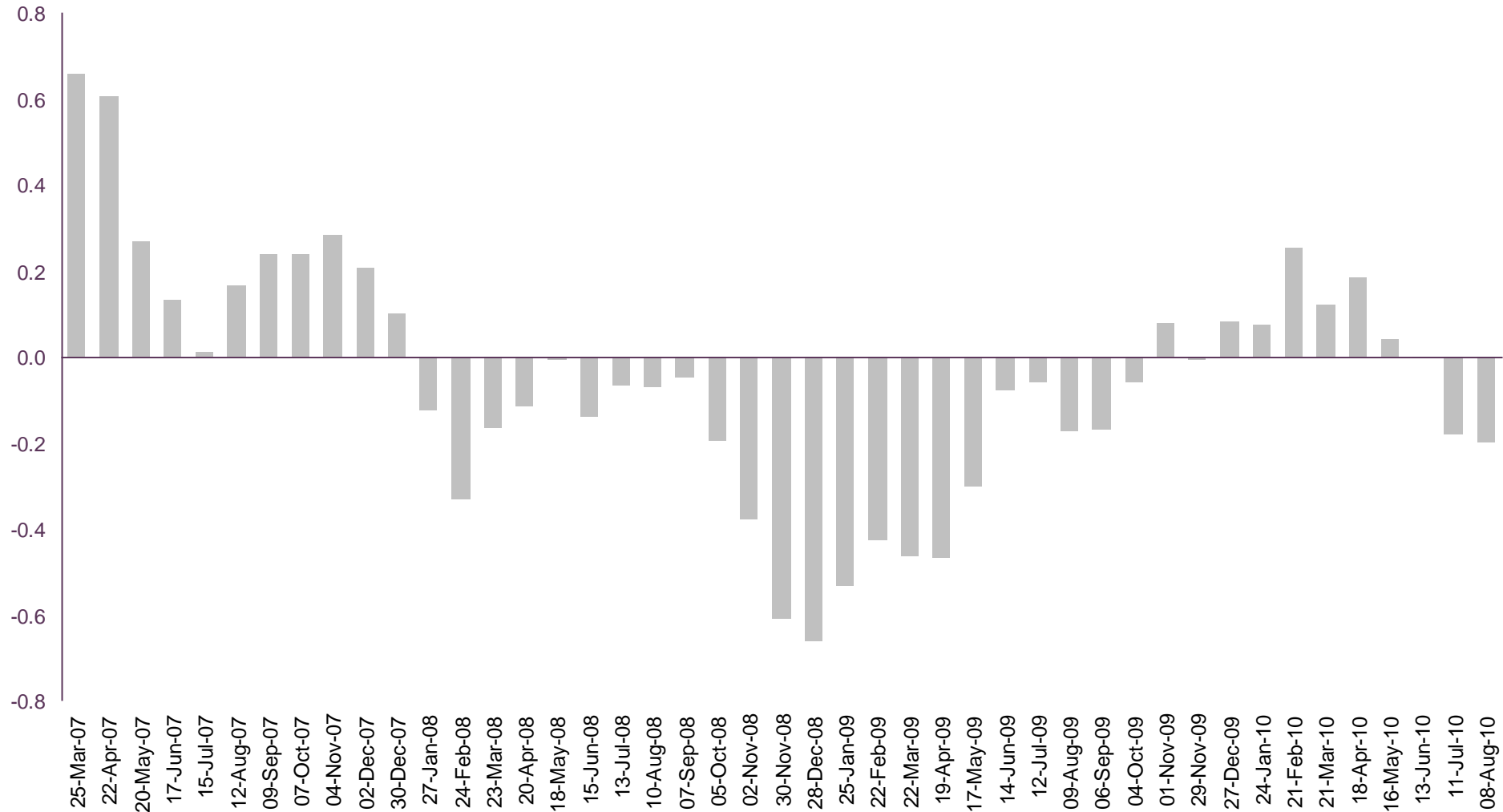
Long-Term Share of Till Roll Grocers



Latest Quarter Till Roll Totals - Share of Total Grocers



Tesco Share Change - 12 week share year-on-year change



Tesco handed second ASA ban after Asda complaint

Tesco has had national TV and press ads banned by the Advertising Standards Authority for the second time in less than a year, following a complaint from rival supermarket Asda.



Tesco: second ad ban within a year

The ads, created by The Red Brick Road, ran in October last year and promoted a price comparison between products in store, based on Clubcard transactions in store on 28 September, compared with its nearest rival, Asda.

The press ad included the copy: "... We include more than half of everything our customers buy"; and the TV ad stated: "Equivalent products compared, covering over half of our customers purchases."

The ASA ruled that both ads were misleading, because Tesco listed more than 31,000 lines on Tesco.com, but only matched around 12,000 of those lines with Asda.

The ASA also noted the reference to "baskets" in the ads was misleading, because Tesco could not match all the items in each basket and, in some cases, had matched only one item.

The ASA stated that the press ad breached CAP Code clauses 'truthfulness' and 'comparisons with identified competitors'. It also ruled that the TV ad breached the same clauses.

Related Articles

- Tesco swift to fall in with government plans on alcohol pricing
- Tesco price comparison ads banned by ASA

Top Marketing Articles

- Bahlsen takes on McVitie's in Jaffa Cake war
- P&G chief urges brands to 'move people'
- Unilever scraps Chrysalis unit
- Tetley tea folk in comeback
- Stella launches black lager for 'posh' drinkers

Top Marketing Features

- The big sell-in
- From first love to Slim-Fast
- Doing the business
- Electric cars face marketing short circuit
- Brand Health Check: Prudential

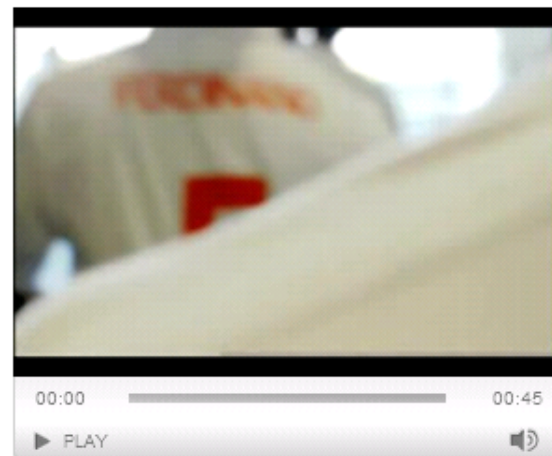
Top Marketing Analysis

- The power of perception
- Turned off

Jobs

- Brand Manager - Top 5, Jarlett de Grouchy
£35000-£40000, Central London
- Digital Marketing Manager - Gaming , Handle Recruitment
£40000-£50000, Central London
- Digital Marketing Manager - Gaming , Handle Recruitment
£40000-£50000, Central London
- TV Media Manager, PFJ
£30000-£35000, Central London

[Search More Marketing Jobs](#)



News by Email

Marketing Daily News : [Preview](#)
Ad Watch Bulletin : [Preview](#)

You need to [register](#) to receive our bulletins. Registration is free and only takes a minute. If you have already registered then [sign in](#) to your account now and selected 'My bulletins' within preferences.

Publishing on a budget



Price check at Tesco

We are in the process of improving this webpage and an exciting new page will be up shortly. In the meantime, our Price Check price comparison tool is still available for you to use, which provides you with Tesco and Asda prices on thousands of comparable products.

Helping you spend less every day.

If you want to see just how low our prices really are, simply search for any product in the Price Check box and see how we stack up!

PRICE CHECK
Simply type in the product you want to check and click 'compare'...
Product: [compare ▶](#)

[Browse by aisle](#)



Heinz Bean Snap Pots 4X200g



Rest of shelf

£1.72 (£2.15/kg)

Quantity

- 1 +

Add



Heinz Baked Beans Tomato Sauce 415G



Rest of shelf [Cheaper alternatives!](#)

£0.64 (£1.55/kg)

Quantity

- 1 +

Add



Heinz Baked Beans Reduced Sugar And Salt 200G



Rest of shelf

£0.43 (£2.15/kg)

Quantity

- 1 +

Add



Heinz Reduced Sugar And Salt Baked Beans 400G



Rest of shelf

£0.64 (£1.60/kg)

Quantity

- 1 +

Add



Heinz Bean Meals Plus Saucy Steak Beans 415G



Rest of shelf

£0.87 (£0.21/100g)

Quantity

- 1 +

Add



Heinz Curry Beans 200G Can

£0.57 (£2.85/kg)

Quantity

- 1 +

Add



Heinz Beanz Snap Pots 4X200g

£1.72 (£2.15/kg)

Quantity

- 1 +

Add



Cheaper Alternatives for Heinz Baked Beans Tomato Sauce 415G



Tesco Baked Beans Tomato Sauce 420G

£0.44 (£1.05/kg)

Quantity

- 1 +

Add

£0.44 (£1.05/kg)



Rest of shelf



Heinz Reduced Sugar And Salt Baked Beans 400G

£0.64 (£1.60/kg)

Quantity

- 1 +

Add



Rest of shelf



Heinz Bean Meals Plus Saucy Steak Beans 415G

£0.87 (£0.21/100g)

Quantity

- 1 +

Add



Rest of shelf



Heinz Curry Beanz 200G Can

£0.57 (£2.85/kg)

Quantity

- 1 +

Add

TESCO

Every little helps

Contact us

TESCO direct



DOUBLE CLUBCARD POINTS*

Groceries & Wine



UP TO 50% OFF SELECTED WINE AND CHAMPAGNE**

Entertainment & Digital



PRE-ORDER NOW SEX AND THE CITY

Finance & Insurance



TESCO Compare

Phones & Broadband



Great New Range!

More Online Stores



triple clubcard points
www.tescodirects.com

BRITAIN'S BIGGEST DISCOUNTER IS NOW OPEN.

100s of discount brand products

100s of new price cuts

[Go to groceries ▶](#)

Offers:



Clubcard:



Health:



Community:



Environment:



Baby:



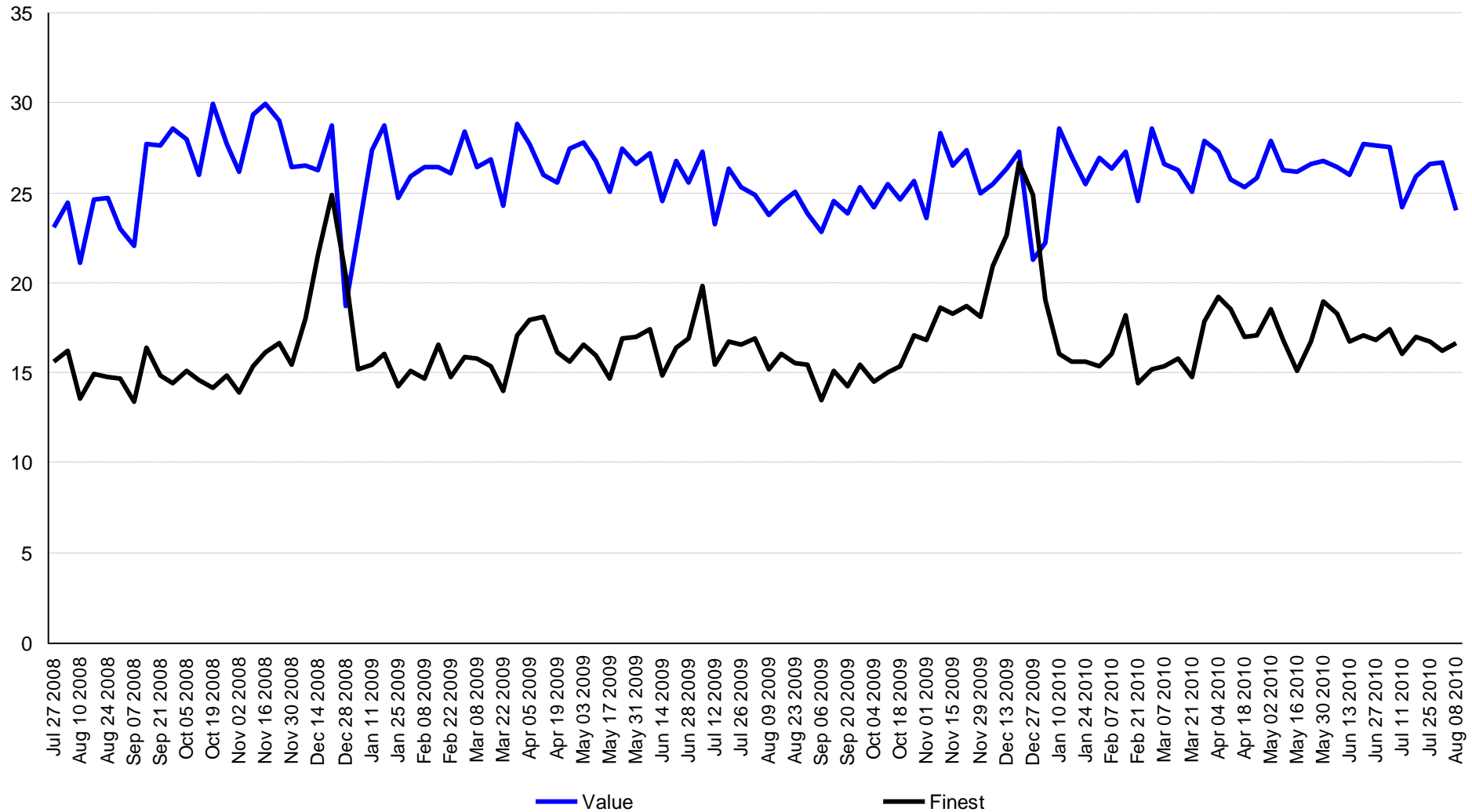
TESCO magazine

Store Locator

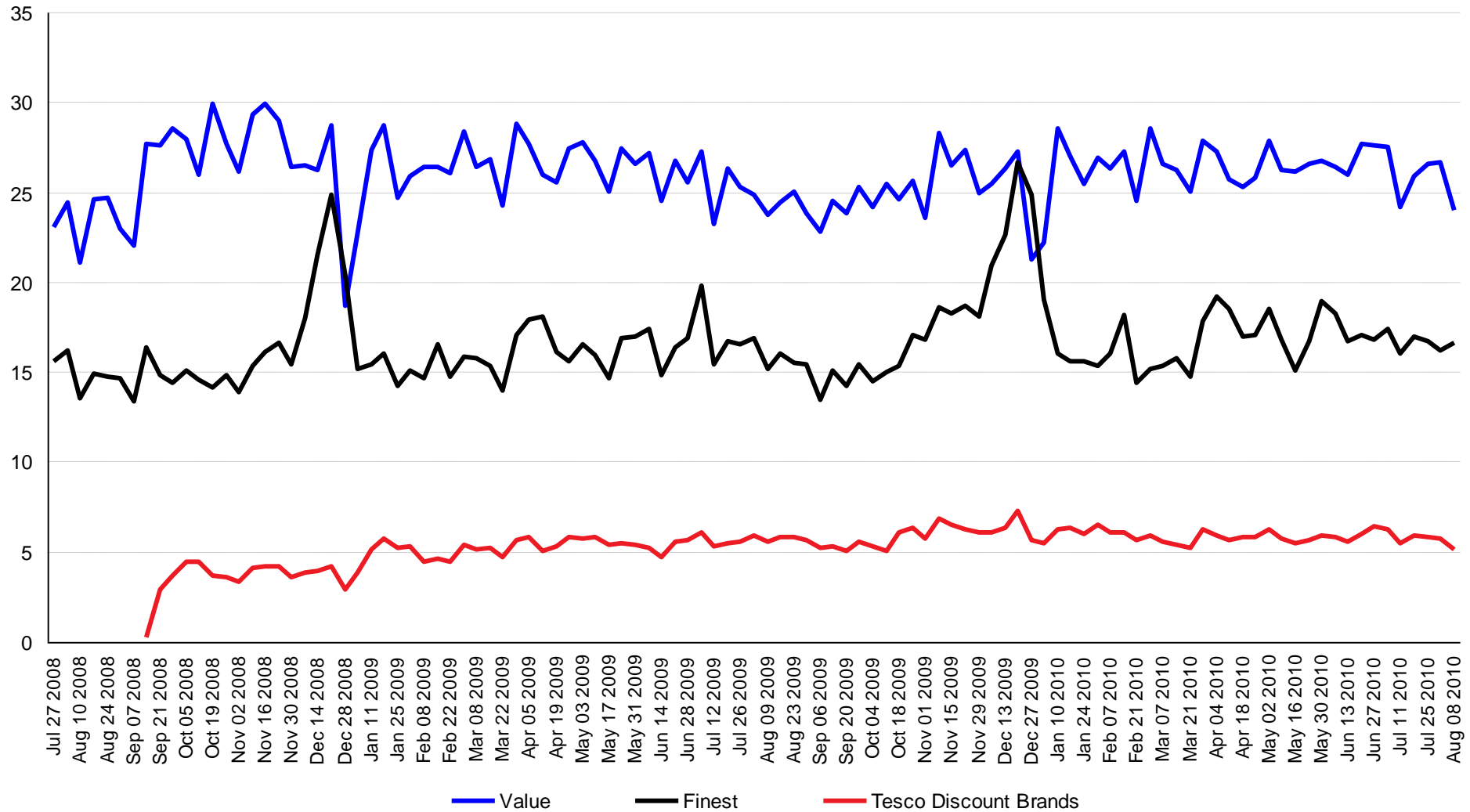
PRICE CHECK



Tesco Private Label Weekly Sales £m



Tesco Private Label Weekly Sales £m

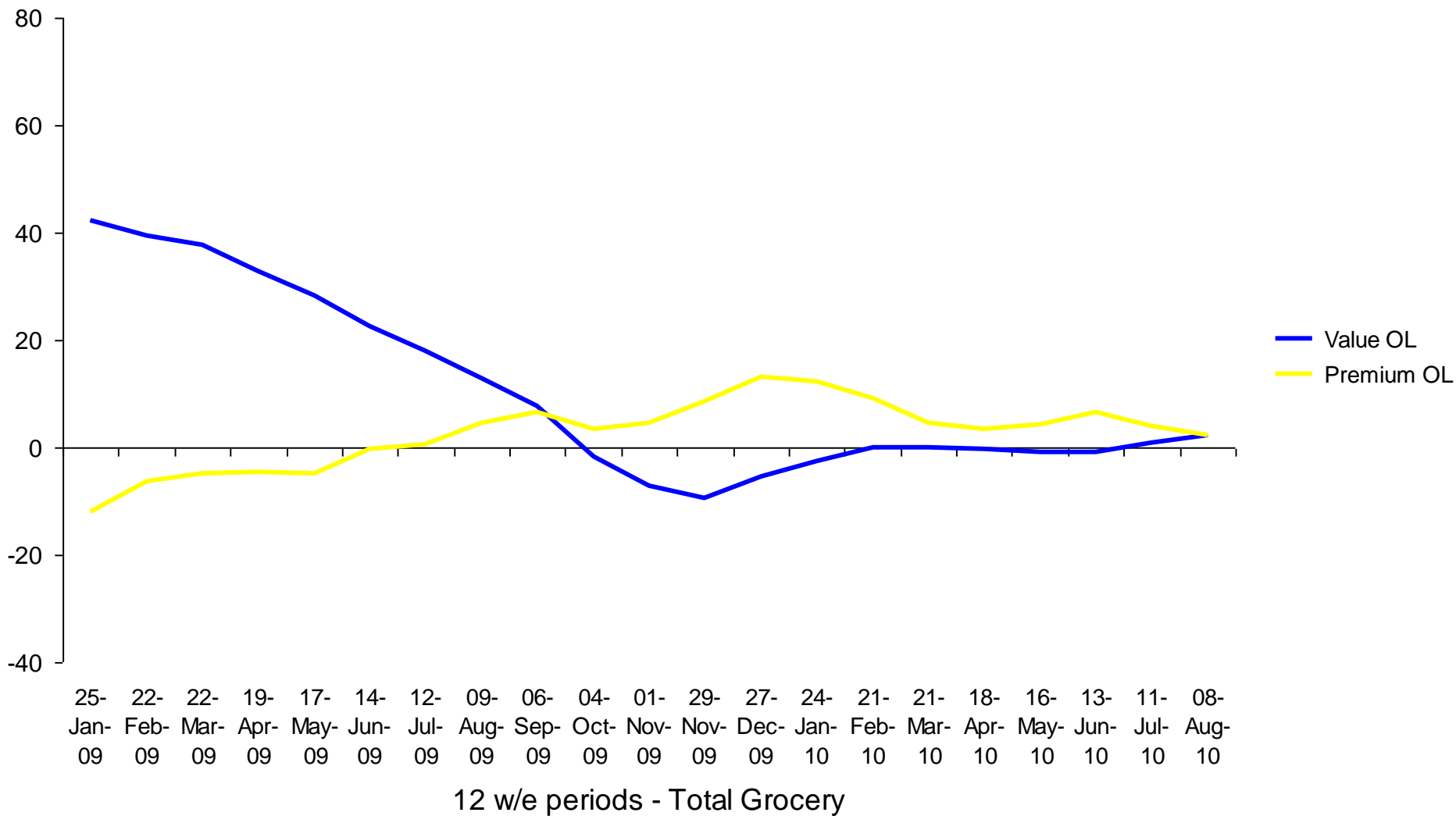


Tesco

Household Income Signatures

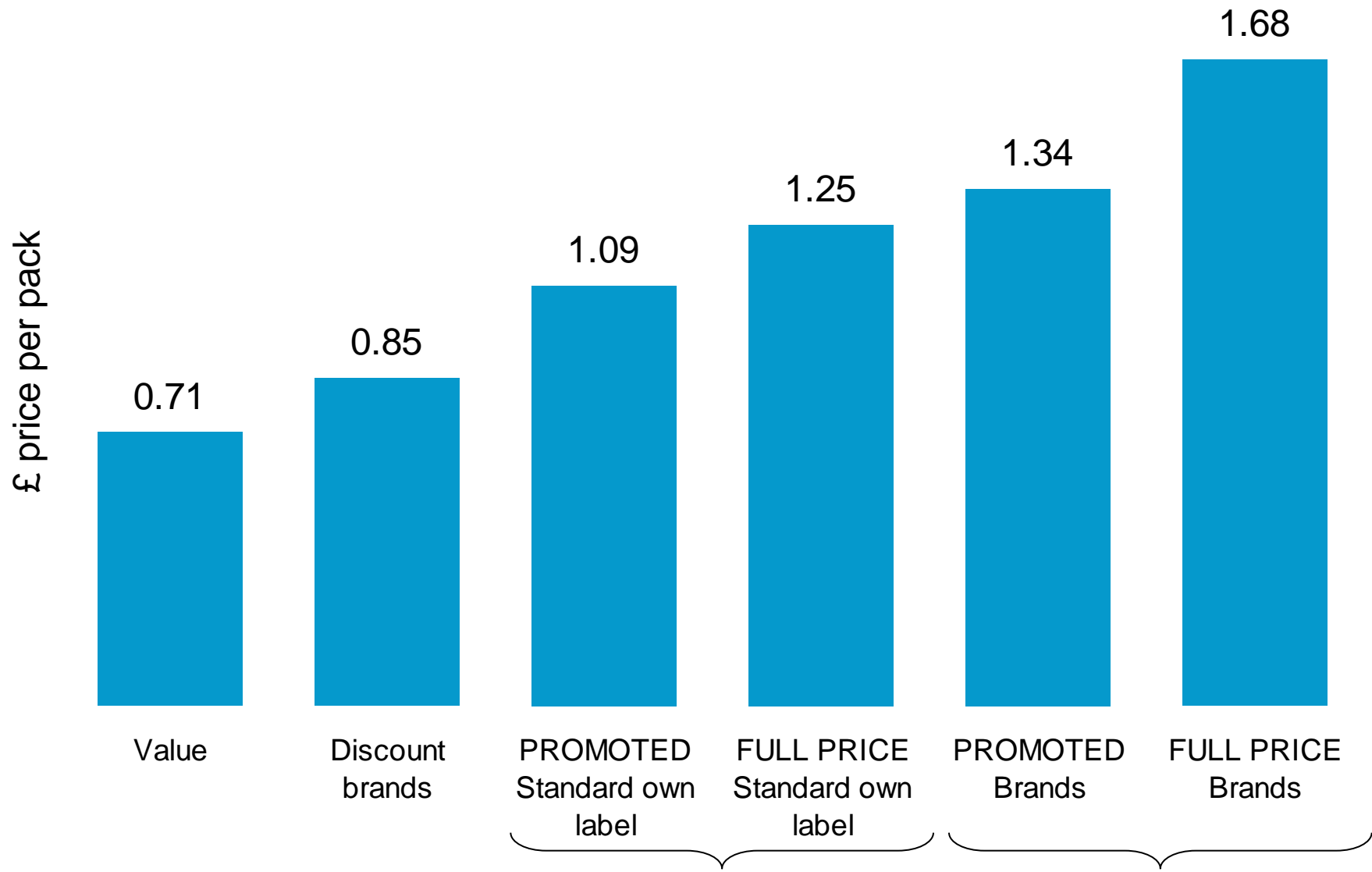


Tesco Year-on-Year £% Changes



Average Price per pack in Tesco

Discount between Value and Promoted Own Label



Grocery Home

My Favourites

Express Shopper

Food & Drink

Health & Beauty

Baby & Toddler

House & Pet

Recipes

Offers & Ide

[Grocery homepage](#) > [Finest Meal £9](#)

Finest^{*}
Meal and Wine
for Two for £9

Finest^{*} Side

+

Finest^{*} Main Course

+

Finest^{*} Dessert

+

Finest^{*} Wine

=

£9

Buy any Side dish, Main course, Dessert and Bottle of Wine from the list below for only £9

<i>Finest</i> [*] Side Dishes		<i>Finest</i> [*] Main Course	
<i>Finest</i> [*] Dessert		<i>Finest</i> [*] Wine	

Last updated: 05/09/2008

Tesco Copyright 2008

Be inspired by over 900 recipes

Every little helps



Wine offers



3 for...

Any 3
SELEC

From £3.99

Valid for deliveries between 18 Nov



HALF PRICE

Better
HARD

£4.00

Valid for deliveries between 18 Nov



HALF PRICE

Better
HARD

£4.00

Valid for deliveries between 18 November 2009 and 24 November 2009



HALF PRICE

Better Than HALF PRICE Was £9.99 Now £4.00
HARDYS CREST CABERNET SHIRAZ 75CL

£4.00

Tesco.com - Tesco.com - Special Offer - Microsoft Internet Explorer provided by...
http://www.tesco.com/superstore/product/promo.aspx?prodId=64456336

ANY 3 FOR £10.00

The items below are only available for deliveries on or before 24 November 2009. To take advantage of this offer, add 3 items (or multiples of 3) to your basket.

	Berberana Carta De Plata Red 75cl Write a note	£5.99 (£5.99/75cl)
<p>How many</p> <p> <input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/> </p> <p><input type="button" value="Add"/></p>		
	Vina Albali Tempranillo 75cl Write a note	£5.99 (£5.99/75cl)

Internet 100%

ing for

product name

Search

ing Basket

livery slot

order to a new address

ou have no items in your basket

Price:

£0.00

the guide price

cludes savings from multi-save offers. Don't worry, they'll be taken off your final bill from your driver.

Don't forget, you can collect Clubcard Points just like you would in-store.

[Homepage](#)[What is Clubcard?](#)[Register](#)[My account](#)[Clubcard rewards](#)[Collecting points](#)[Spend my vouchers](#)[Clubcard clubs](#)

Sign up now to receive emails on great Clubcard offers...



- Great ways to collect points
- The latest ways to spend your vouchers
- Exciting Clubcard news

[Don't miss out, sign up today! >](#)

More ways to spend your vouchers

[Clubcard rewards >](#)

Up to
4x more
value!

[Across Tesco >](#)

How to collect points

[Collect more >](#)

New to Clubcard?

Find out how you can start collecting points today.

[More >](#)

Clubcard on your smartphone

Get the latest Clubcard App for your Smartphone.

[More >](#)

Clubcard news and offers

Helping you get the most out of your Clubcard.

[More >](#)

Points calculator

See how quickly your points could add up.

[More >](#)

Sign up for emails

Keep up to date with great offers and news.

[More >](#)[Site Map](#)[Contact Us](#)[Help & FAQs](#)[Terms & Conditions](#)[Clubcard Charter](#)[Greener Living](#)[Gift Card](#)

The Agenda

- A sense of proportion returns
- Tesco – Never complacent
- > – Asda – Price and/or Quality
- Sainsbury's – Striking a Balance
- Morrisons – 'Fresh for less'
- Waitrose – Ethical extremism
- Discounters – Threat postponed
- M&S – Always the Bridesmaid
- Home Delivery





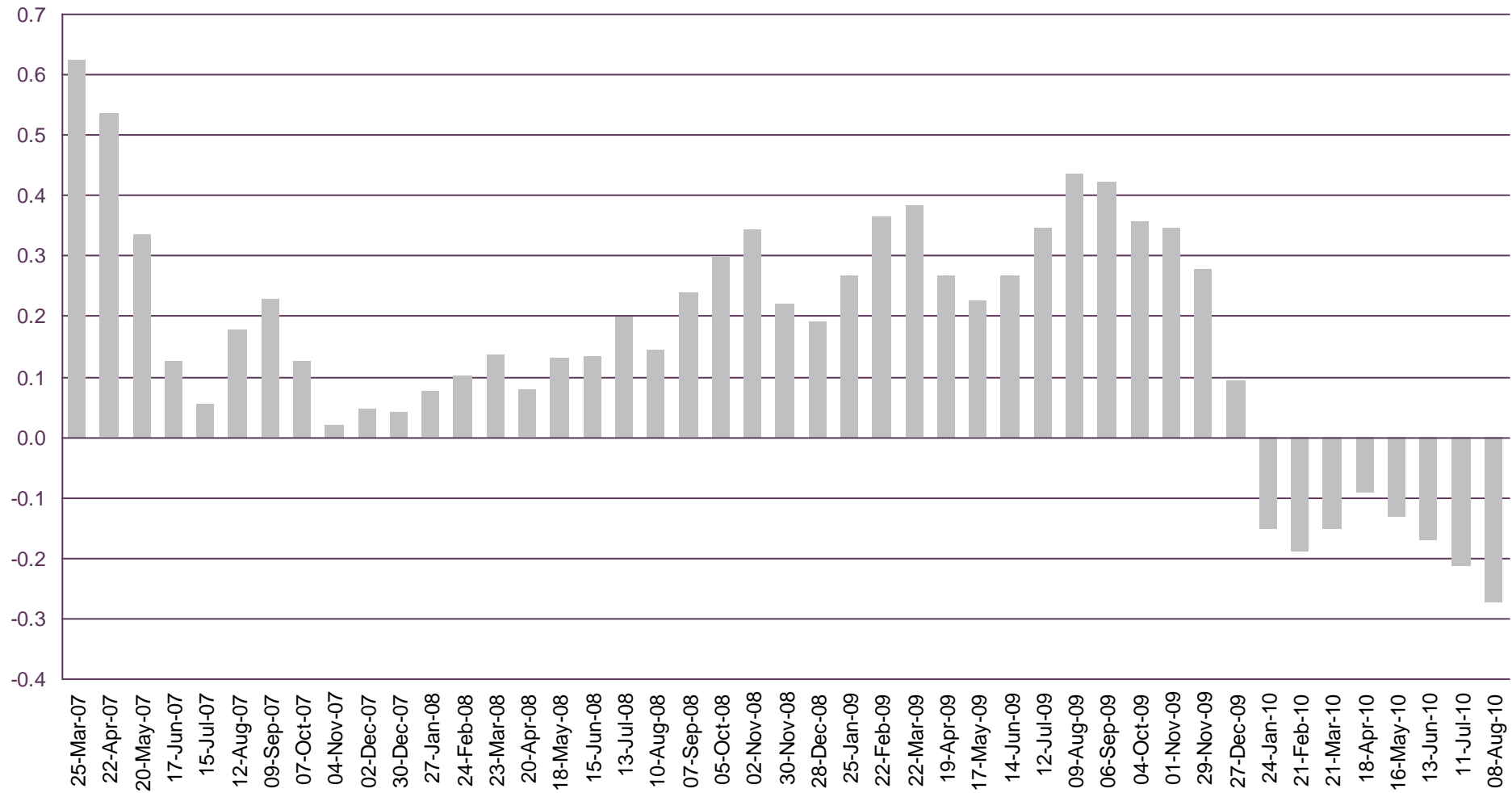
and

versus



or

Asda Share Change - 12 week share year-on-year change



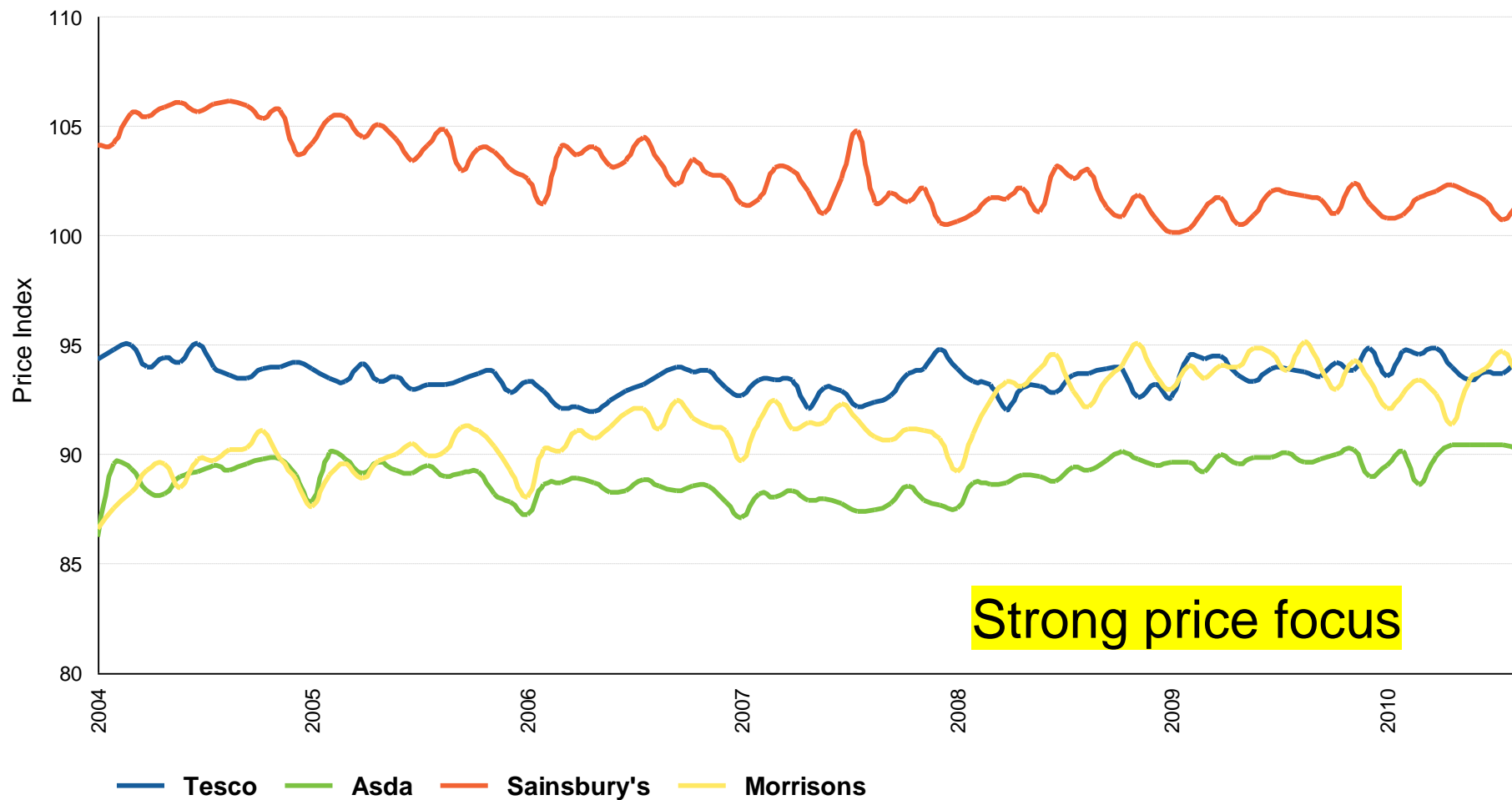


Always **LOW PRICES**



ASDA SAVING YOU MONEY EVERY DAY

Retailer Price Track - Total Grocery





Over 100
soft drinks
£1.

ROLL
BACK

£1

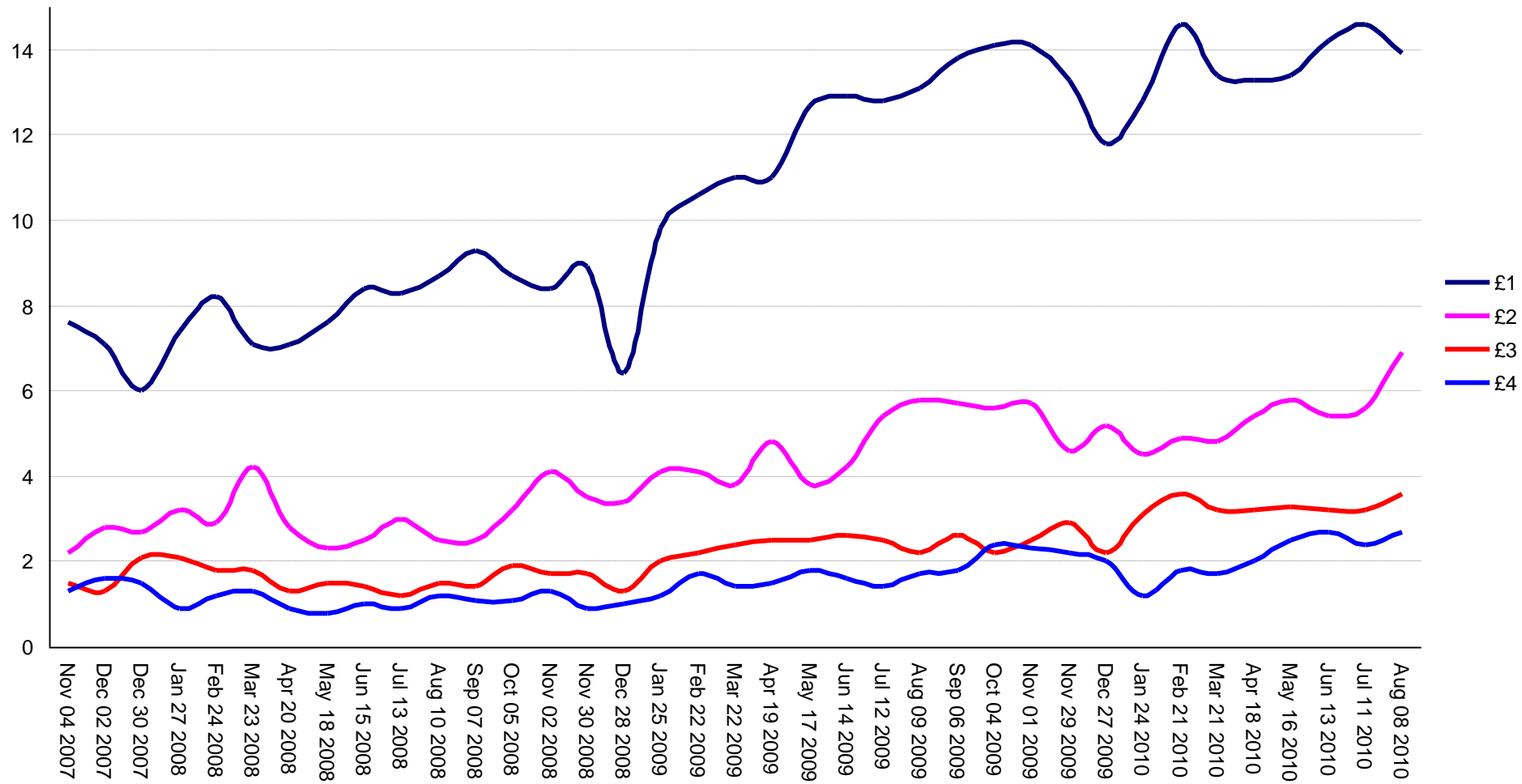
The
Breakfast Event
26th Jan - 15th Feb

any
2 for
£3

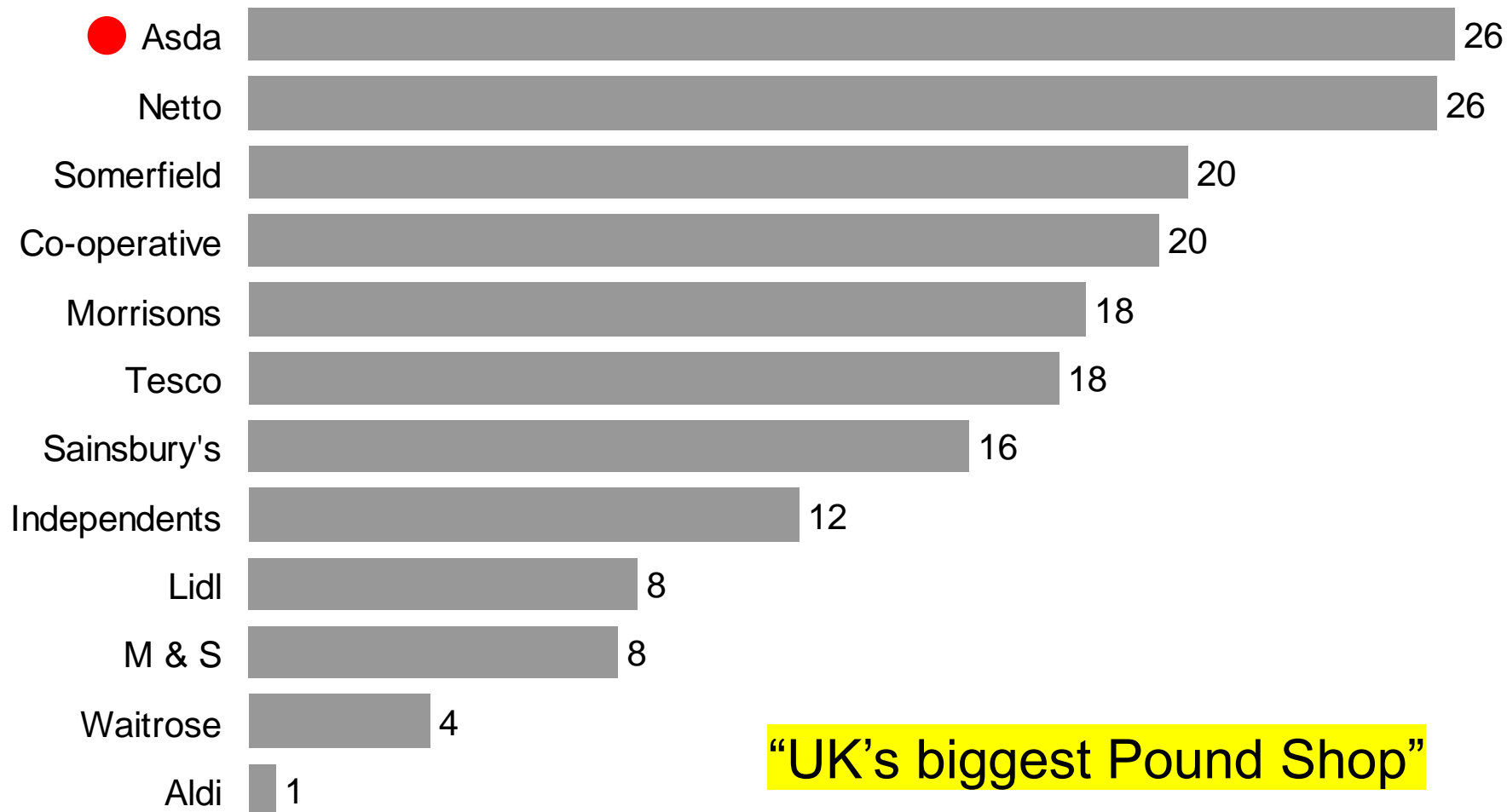


View Offers

Grocery Share at Round Pound Prices - £% - Asda



Grocery Share at Round Pound Prices £1/2/3/4 - £%



“UK’s biggest Pound Shop”

12 w/e Aug 08 2010

Broad Areas indexed on Total Groceries

Total Toiletries	121
-------------------------	------------

Total Healthcare	112
-------------------------	------------

Total Household	111
------------------------	------------

Total Ambient Groceries	102
--------------------------------	------------

Total Alcohol	97
----------------------	-----------

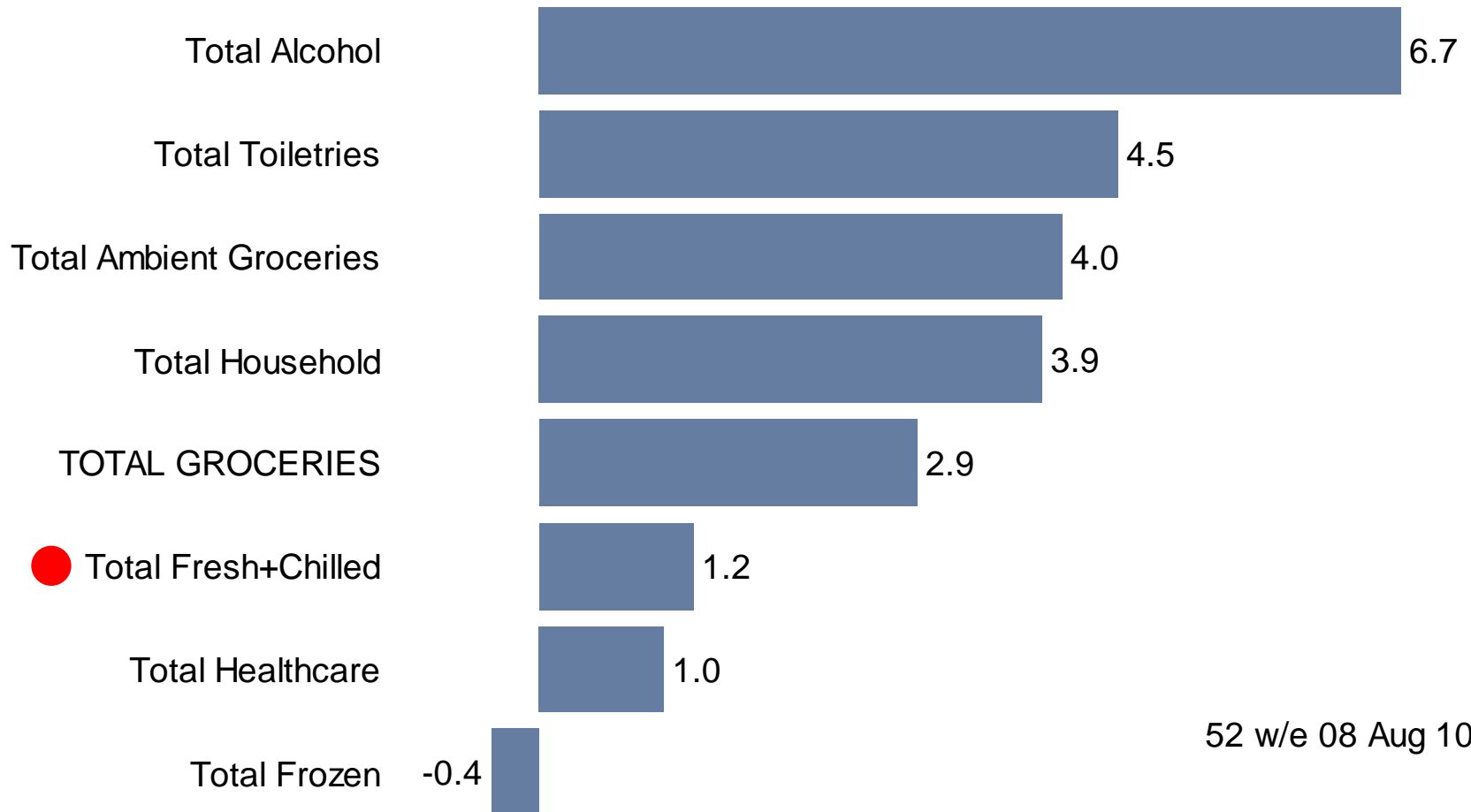
● Total Fresh+Chilled	96
------------------------------	-----------

Total Frozen	94
---------------------	-----------

Weak performance in Fresh

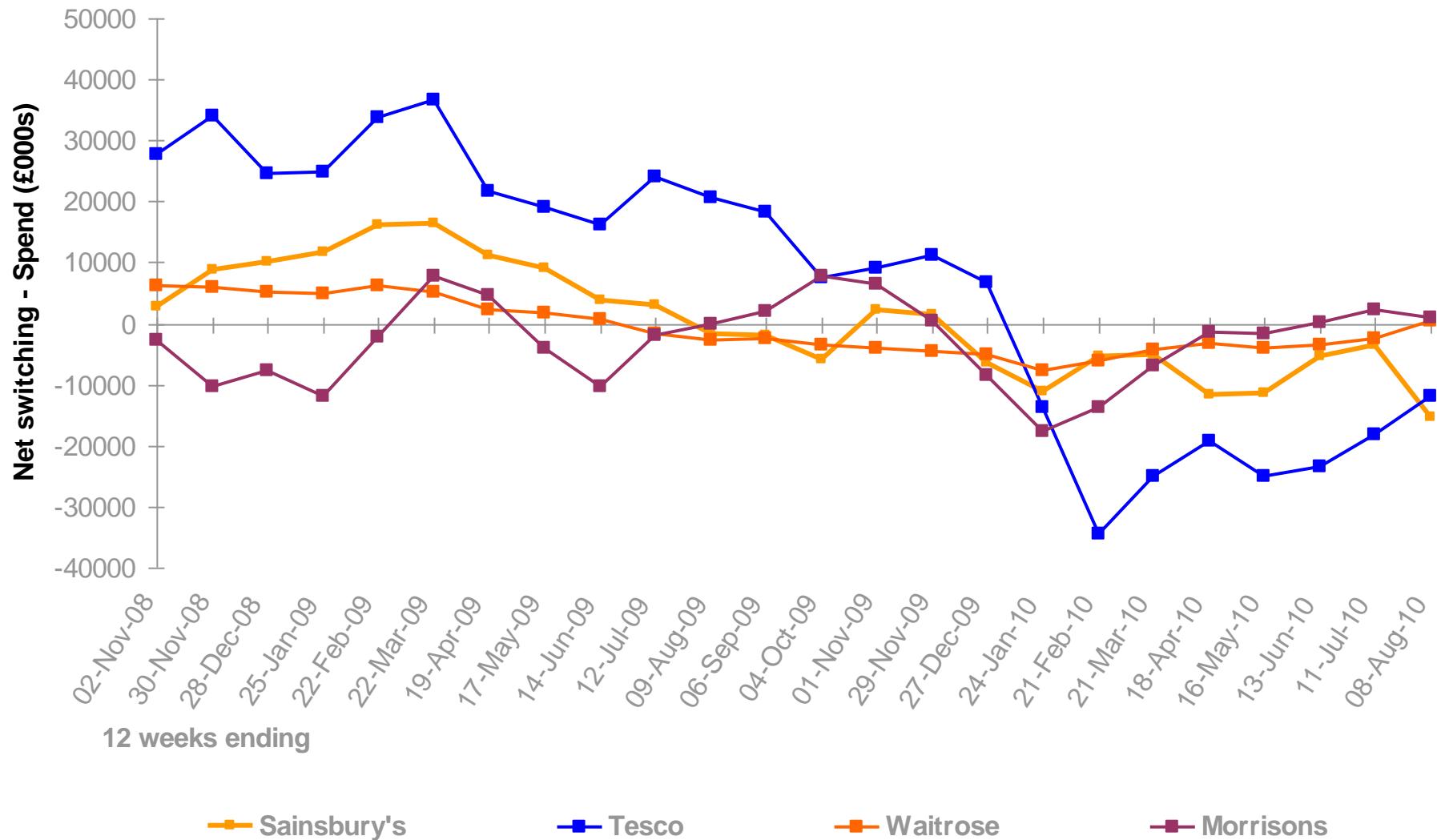
Year-on-Year Expenditure Trends - % change

Asda

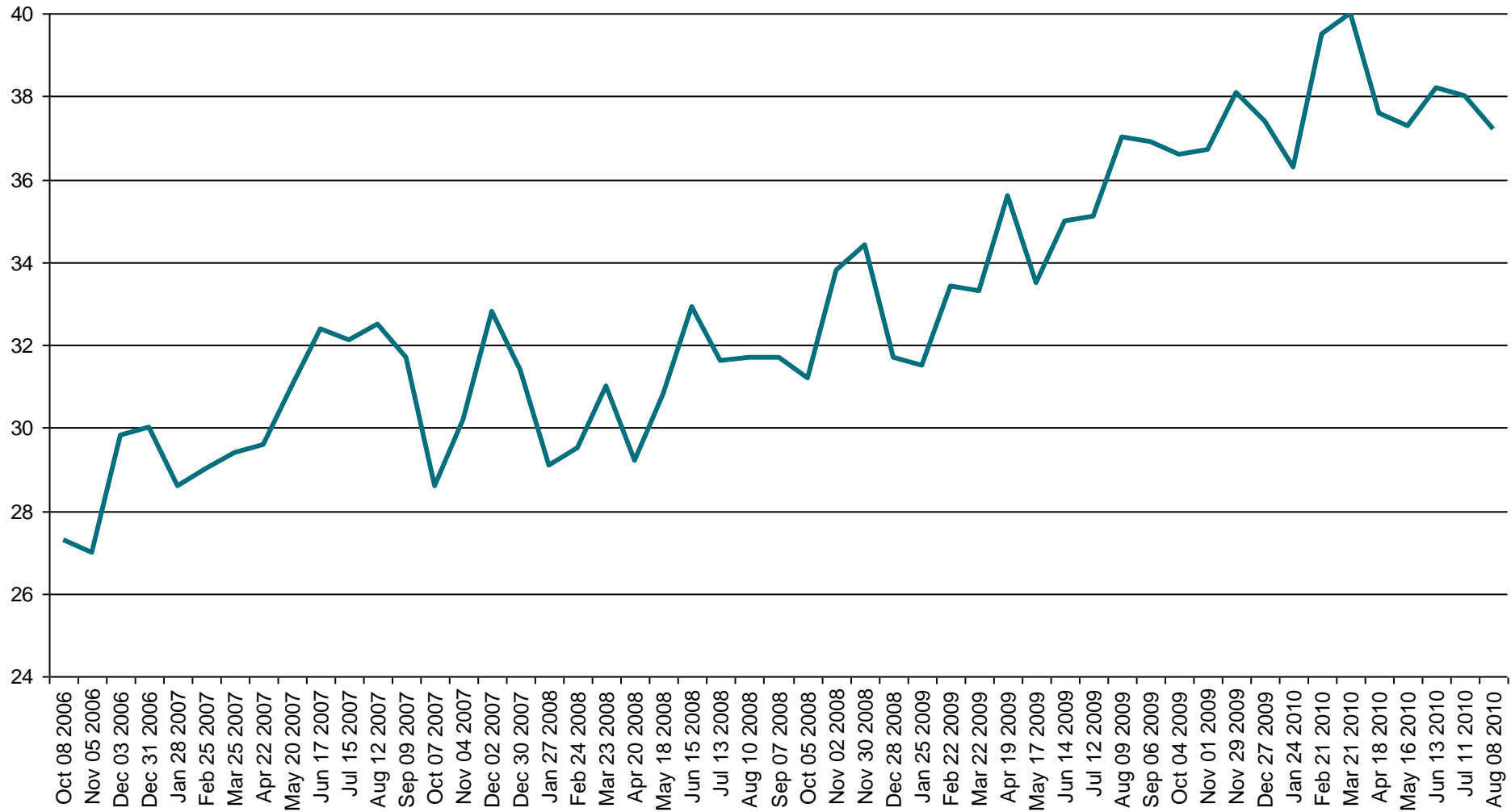


52 w/e 08 Aug 10

Net Switching Volumes to Asda



Total Asda Promotions % Outlet Turnover





Powered by **mySupermarket.co.uk**

COMPARE

ASDA Price Guarantee – your groceries cost less or we give you the difference

Compare your ASDA shop with Tesco, Sainsbury's & Morrisons

ASDA Price Guarantee, powered by the independent grocery comparison site mySupermarket.co.uk offers you the chance to compare the price of your last ASDA shop and see for yourself who's cheapest

Where did you last shop?

My ASDA store

If you recently shopped in ASDA, you can compare the price of your last shop by entering your receipt details.

ENTER RECEIPT



ASDA.com

If you shopped on ASDA.com, please enter your ASDA online login details to compare prices.

LOGIN TO ASDA.com





At Asda we are passionate about food, serious about taste. Extra Special delivers our best tasting food through the quality and provenance of our ingredients and the way the product is made ...

Fruit
& Veg

Meat
& Fish

Dairy, Eggs
& Chilled

Bakery

Tins, Jars
& Packets

Biscuits
& Snacks

Drinks

Frozen

Fresh Fruit & Veg



[> View Offers](#)

Fresh Meat & Fish



[> View Offers](#)

Dairy Eggs & Chilled



[> View Offers](#)

Bakery



[> View Offers](#)

Tins, Jars & Packets



[> View Offers](#)

Biscuits & Snacks



[> View Offers](#)

Drinks



[> View Products](#)

Frozen



[> View Products](#)



Extra Special

28 Day Matured British Sirloin Steak

£17.98

£13.48

per kg

**25% off all our
Extra Special steaks.**

ASDA SAVING
YOU MONEY EVERY DAY

Extra Special

British Filler Steak

£15.98

£17.98

per kg

Extra Special

British Mince Steak

£15.98

£11.24

per kg

Extra Special

British Rump Steak

£12.98

£9.73

per kg

Extra Special

British Frying Steak

£14.98

£8.61

per kg



NEWS

[SunVote](#)

[Forces](#)

[Sun City](#)

[Sun Cashback](#)

[Prepaid Card](#)

[Loans](#)

[Credit Cards](#)

[Jobs](#)

[Cheap fuel](#)

[Lotto results](#)

[Captain Crunch](#)

[Sun Says](#)

[Sun Justice](#)

[Royals](#)

[The Green House](#)

[Scottish News](#)

[Gardening](#)

[Weird](#)

VIDEO

SPORT

[Football](#)

[F1 & Motorsport](#)

[Columnists](#)

[Dream Team](#)

[+ more](#)

SHOWBIZ

[Bizarre](#)

[Bizarre USA](#)

[Film](#)

SunCITY

THE PAGE YOU CAN TRUST - edited by Steve Hawkes

EXCLUSIVE

Asda: Sainsbury & Waitrose grub better than ours



Sony bdps570 3d ready blu-ray/dvd ...

£209.95

Go!



Sony uwabr100 usb wireless network ...

£69.95

Go!



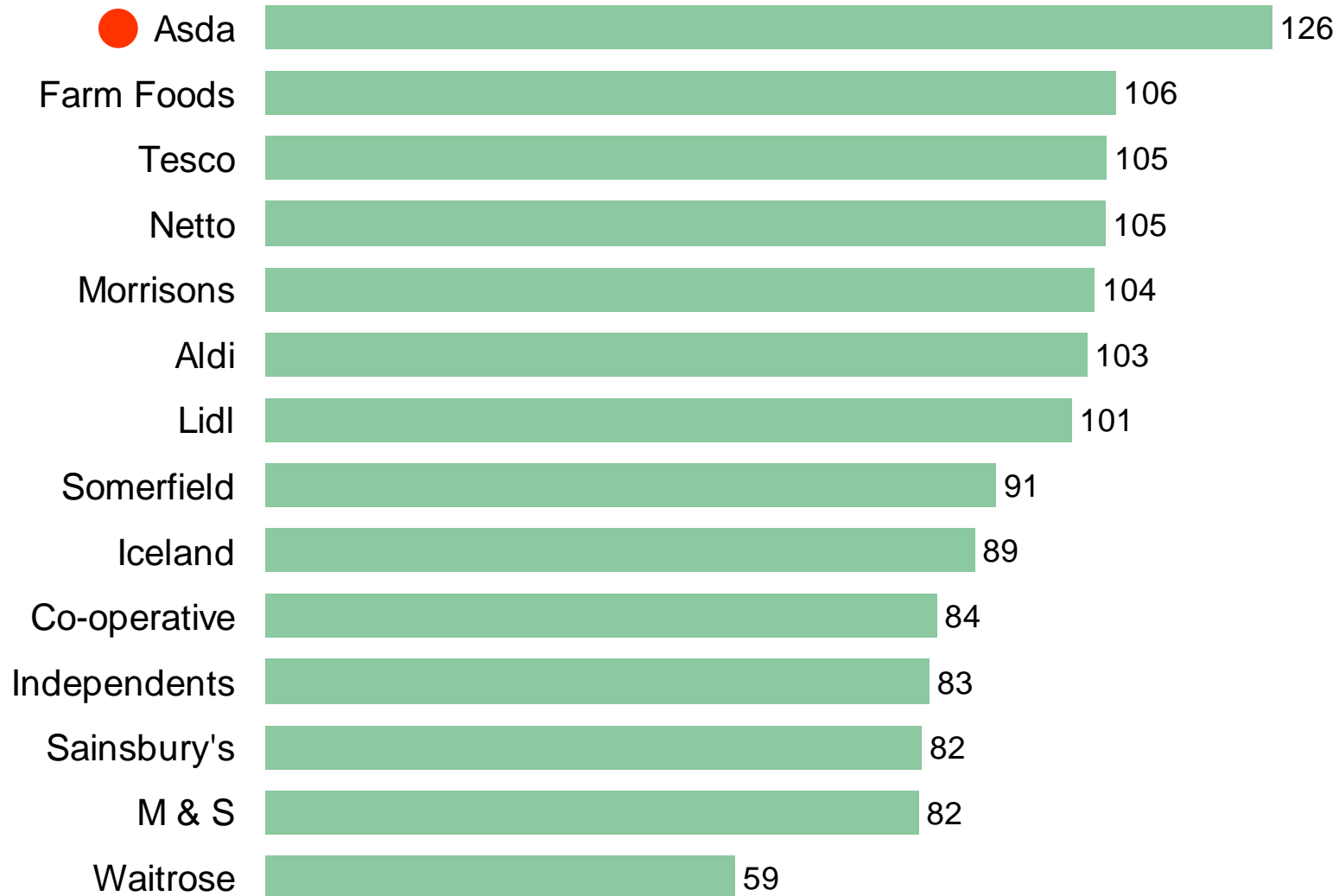
Sony bdps760 networked...

£279.95

Go!

Superfi

I choose my main store because prices are low



On-line Questionnaire - Outlet Share Index 52 w/e Jul 11 2010

The Agenda

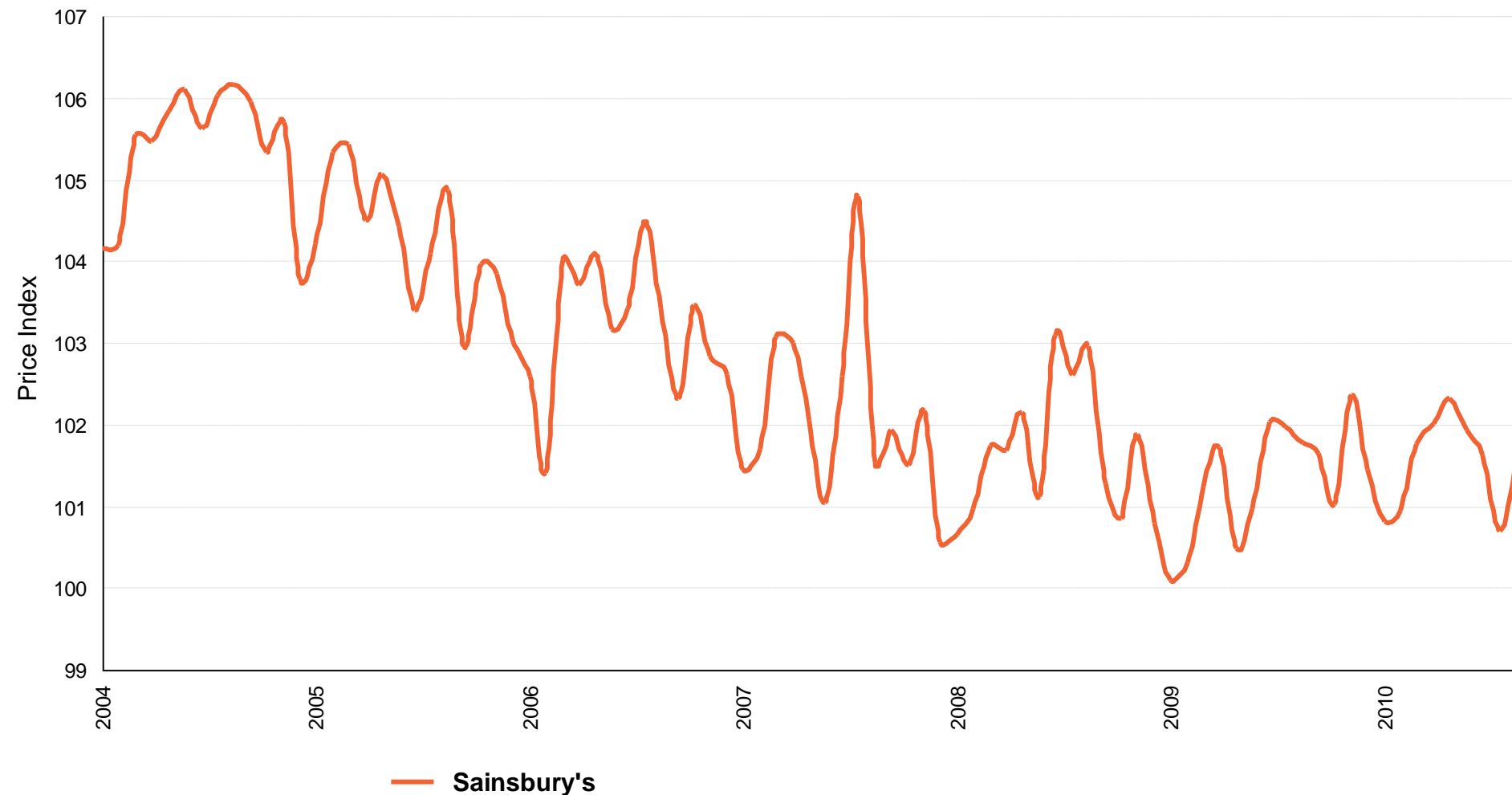
- A sense of proportion returns
- Tesco – Never complacent
- Asda – Price and/or Quality
- > – Sainsbury's – Striking a Balance
- Morrisons – 'Fresh for less'
- Waitrose – Ethical extremism
- Discounters – Threat postponed
- M&S – Always the Bridesmaid
- Home Delivery



Value

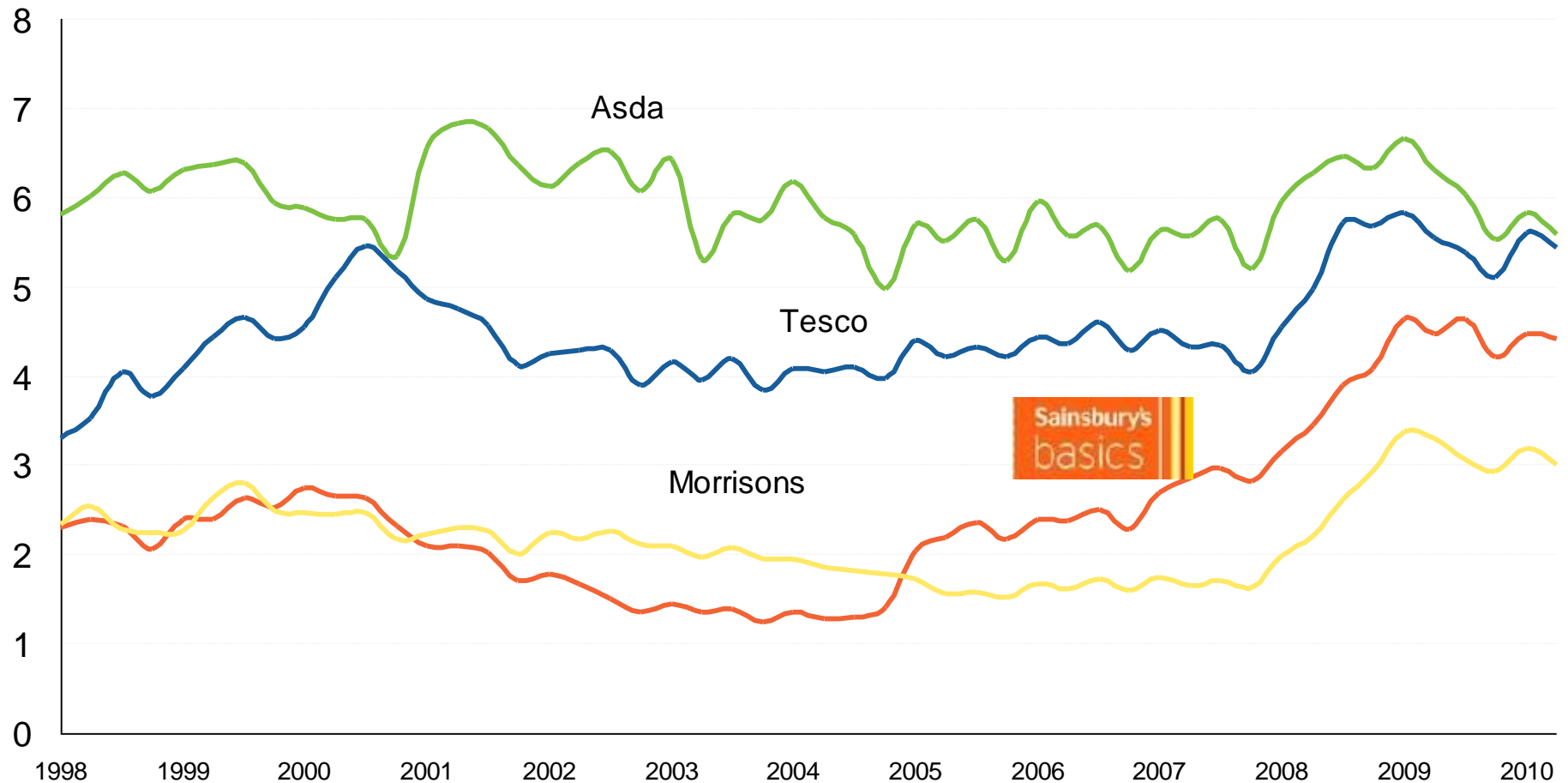
Values

Retailer Price Track - Total Grocery



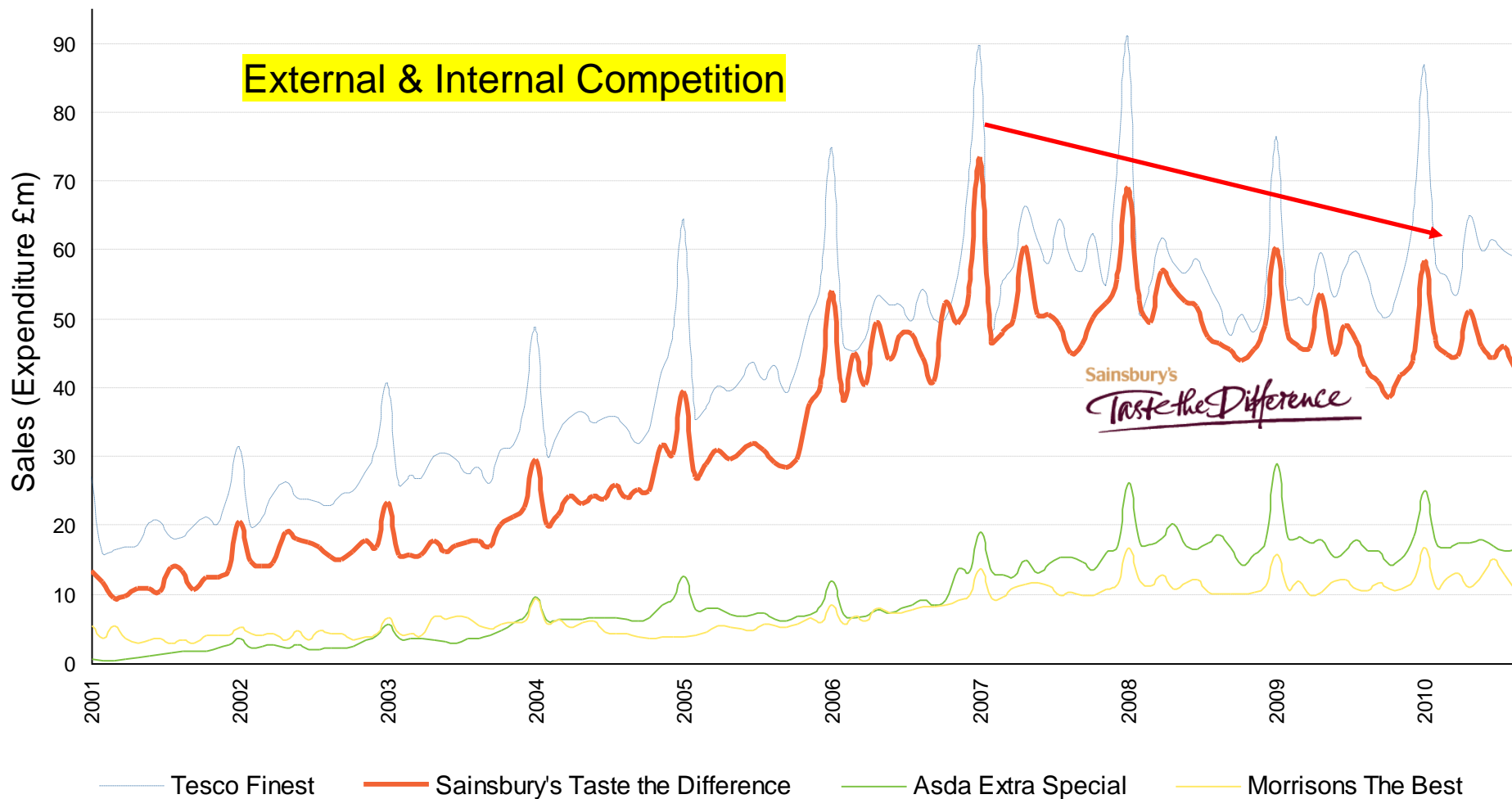
Total Grocery Budget Own-Label Trends

£% within Outlet



Premium Own-Label Sales Trends

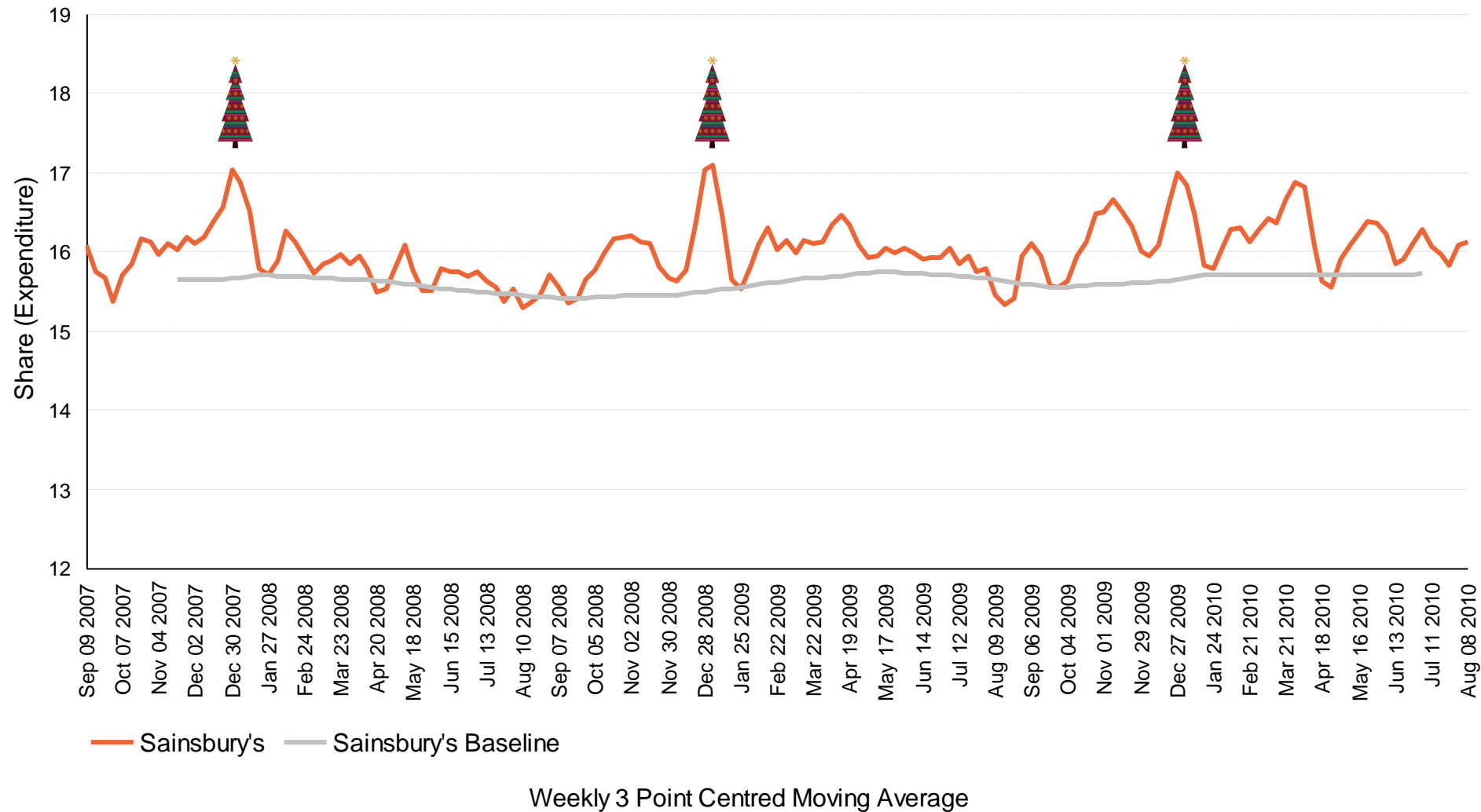
12 wk y-o-y trend **-4%**



Value

Values

Sainsbury's Share of Till Roll Grocers

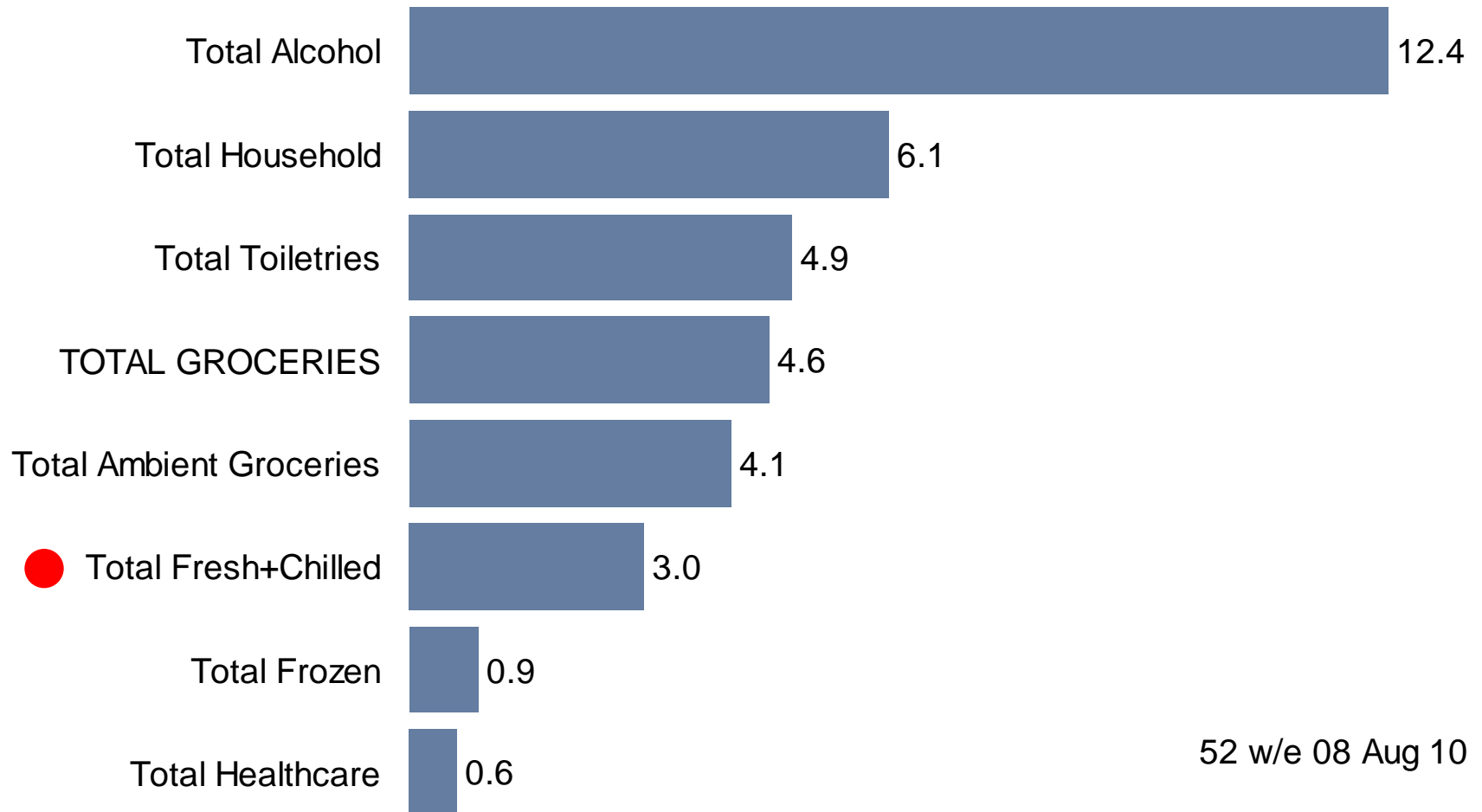


Broad Areas indexed on Total Groceries

Total Healthcare	121
Total Toiletries	117
● Total Fresh+Chilled	108
Total Alcohol	105
Total Household	94
Total Ambient Groceries	92
Total Frozen	72

Year-on-Year Expenditure Trends - % change

Sainsbury's



52 w/e 08 Aug 10

Sainsbury Share Index

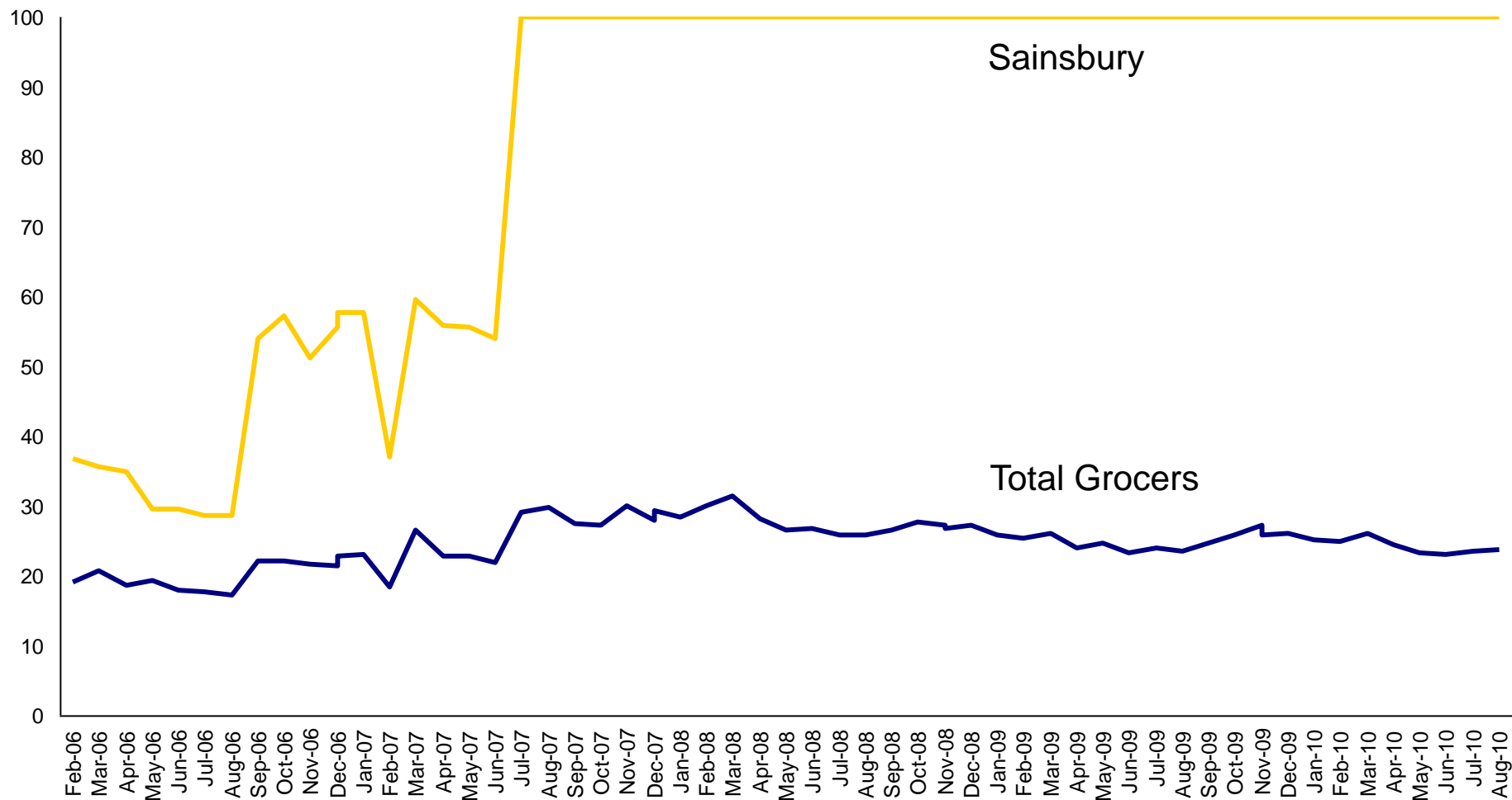
● I actively seek out fair trade products	138
● I am prepared to pay more for organic food	130
The nutritional labeling on food & drink products has an effect on what I buy	119
● I try to buy environmentally friendly products	117
I am more likely to buy a HBA product if it is made of more natural ingredients	116
It is important to me what brand I buy	114
The brand name of the clothes I wear is important to me	113
I regard myself as a connoisseur of food and wine	111
I regularly use different types of media to keep up with the latest fashion trends	110
If usual item is not available than I buy another size rather than change brands	110
I am willing to travel further to shop at the supermarket I prefer	108
● I try to buy local product whenever I can	107
My diet is very important to me	107
I/my partner enjoy cooking to entertain friends and family	107
I am always looking out for health & beauty products with new added benefits	106
My style is influenced by celebrities or people I see in TV or in magazines	106
I restrict how much sugary food I eat	106
I regularly take active exercise	106
I often treat myself/family to a meal out	105
I make a shopping list before I go out and stick to it	105

Share indexed on All Shoppers – 52 w/e Jul 11 2010

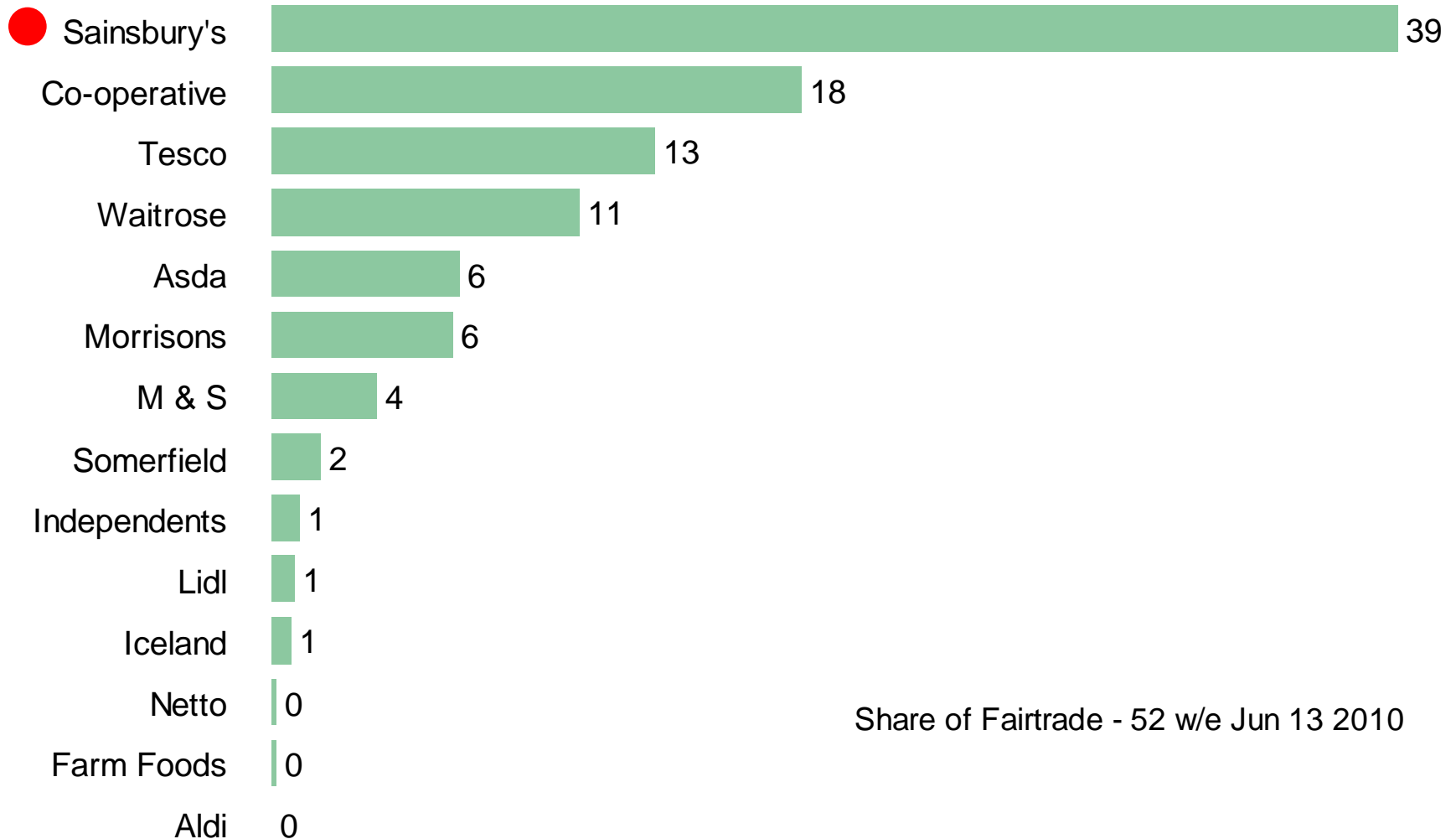
Fairtrade



Fairtrade Prepacked Bananas Market Share



Fairtrade Shares

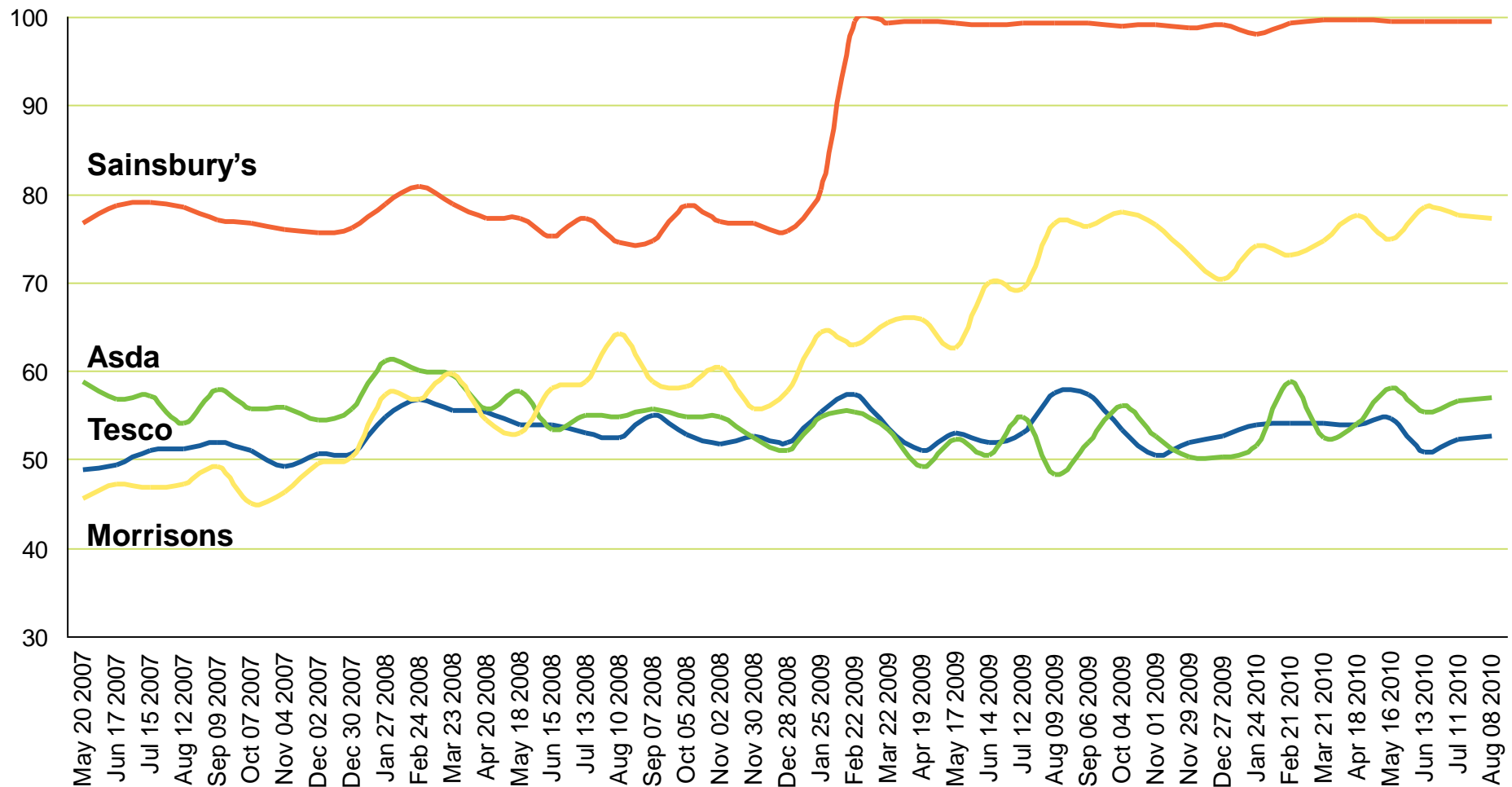


Share of Fairtrade - 52 w/e Jun 13 2010

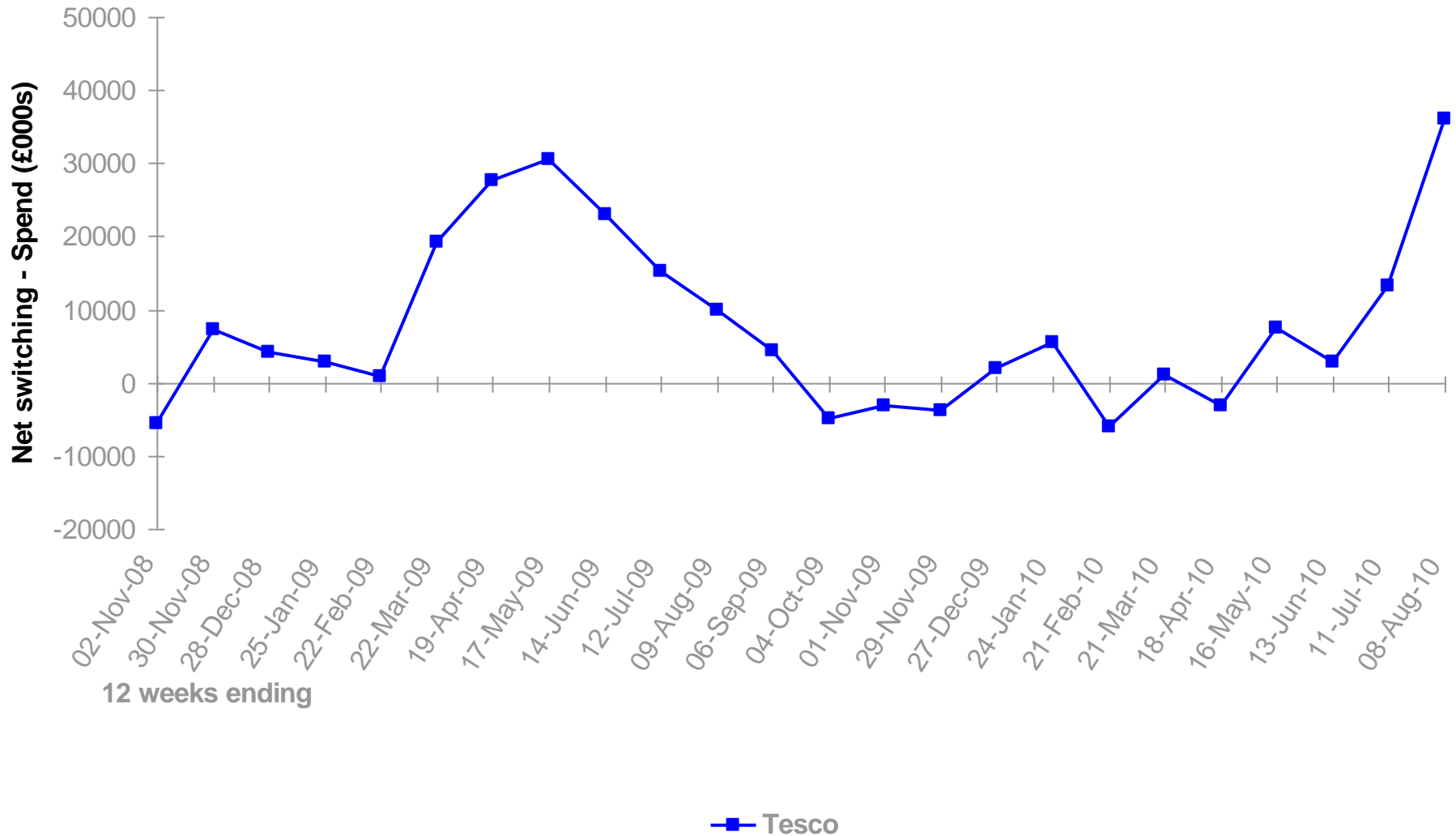
Eggs



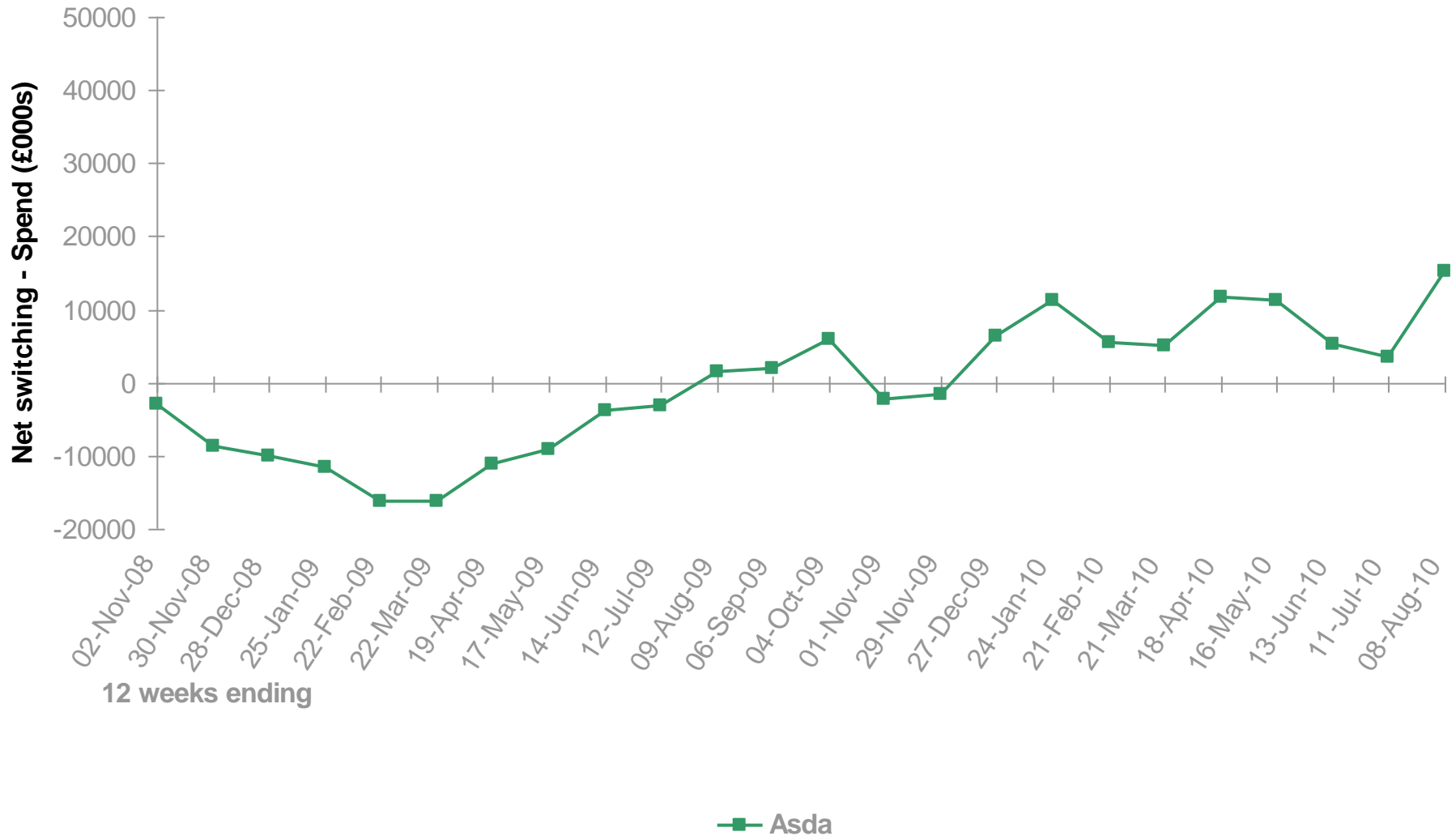
Not-Caged Eggs Market Share



Net Switching Volumes to Sainsbury's



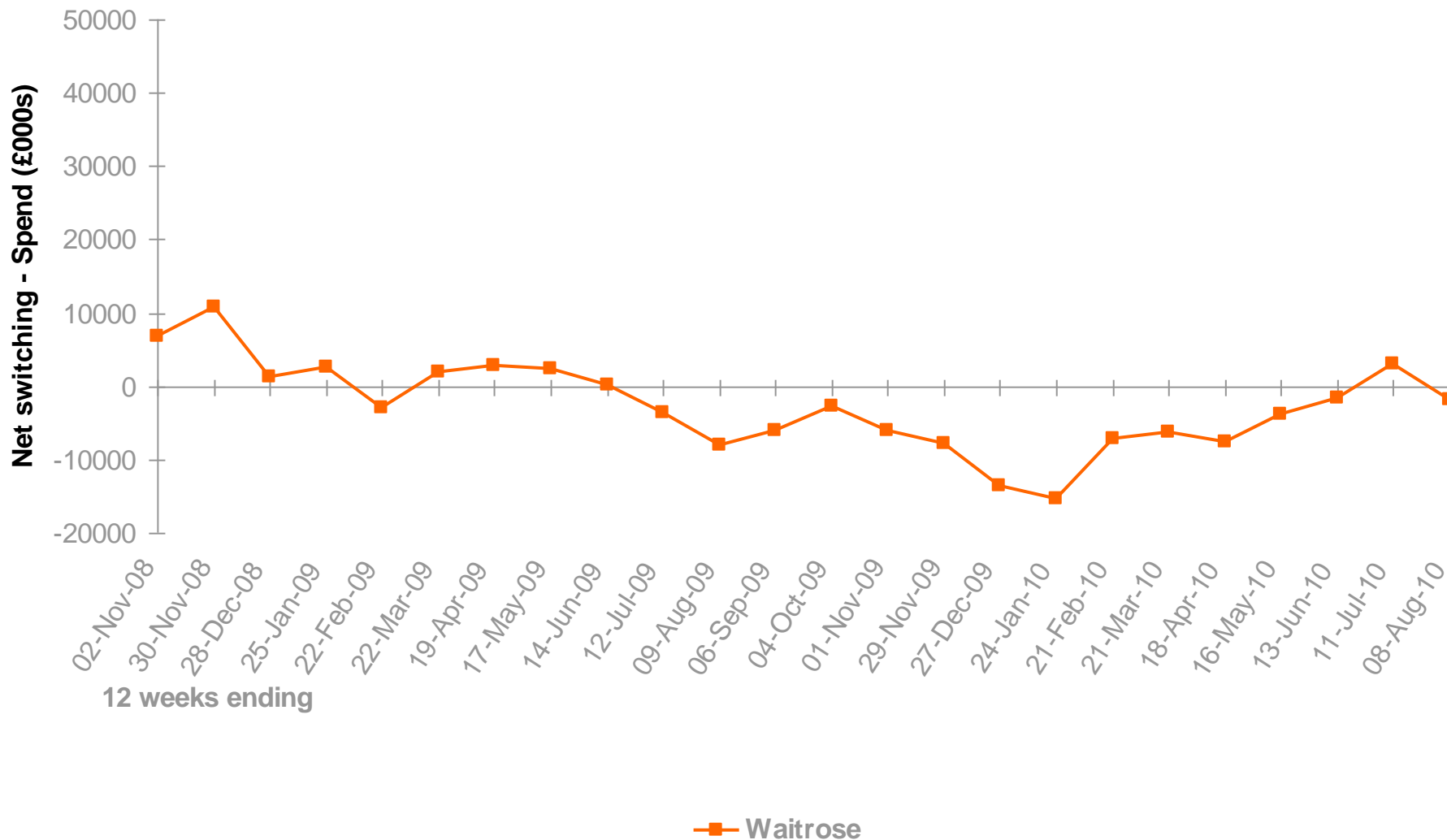
Net Switching Volumes to Sainsbury's



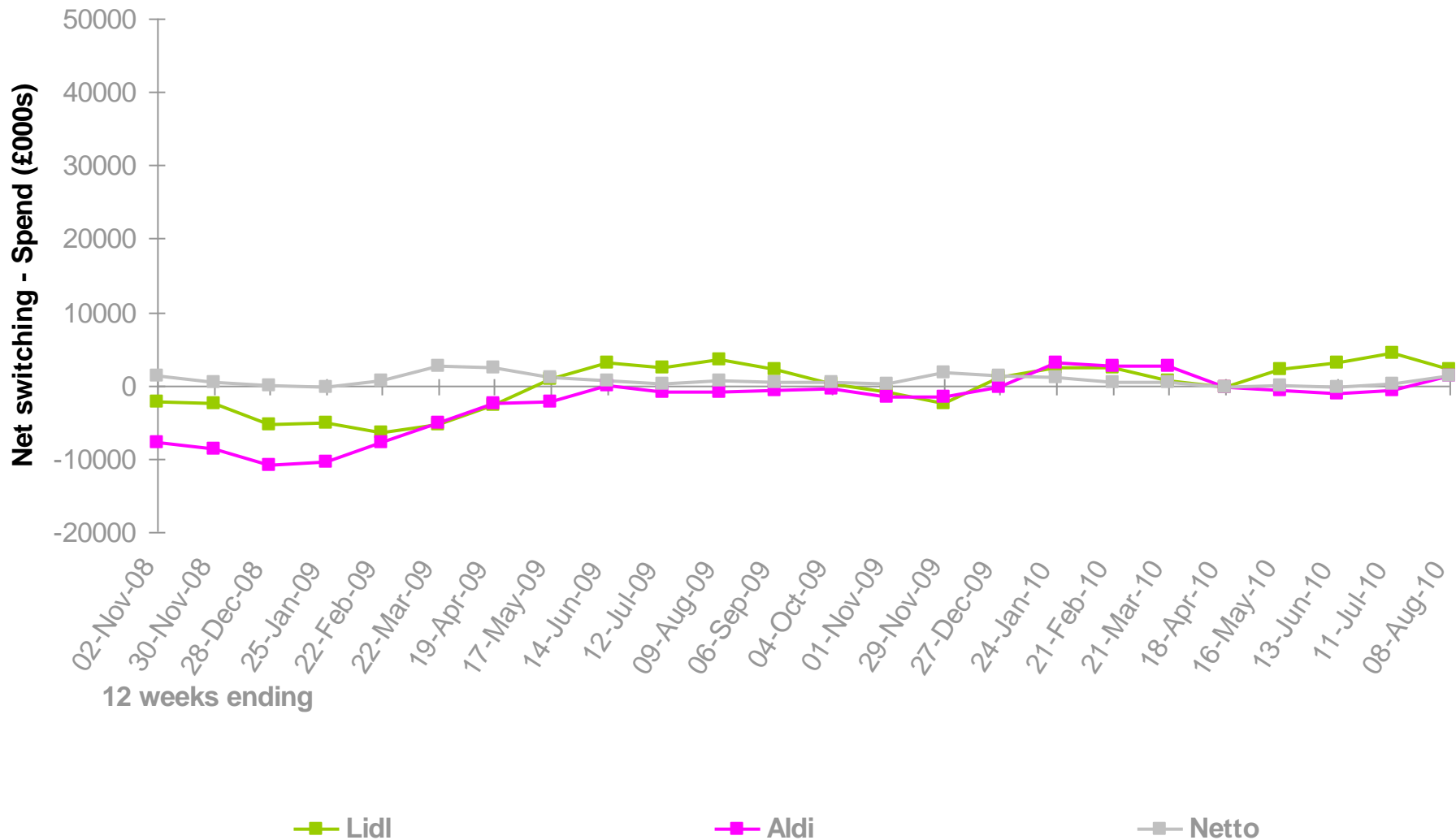
Net Switching Volumes to Sainsbury's



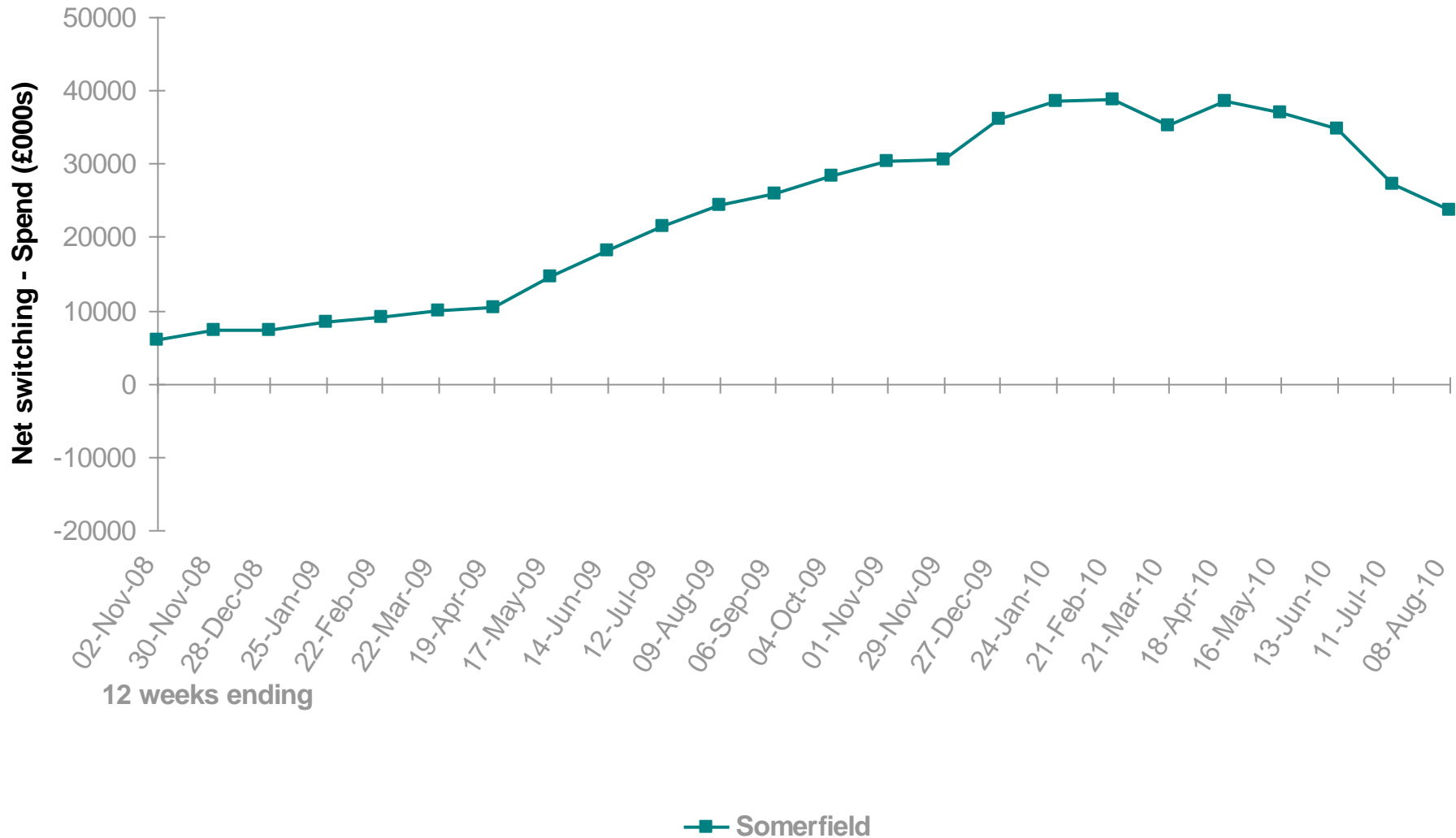
Net Switching Volumes to Sainsbury's



Net Switching Volumes to Sainsbury's



Net Switching Volumes to Sainsbury's



**Switch and
save**
Sainsbury's
own brand



ONLY £4
any 3 for £10

► On selected meat, fish and poultry



ONLY £1

► See more great £1 deals



The Agenda

- A sense of proportion returns
- Tesco – Never complacent
- Asda – Price and/or Quality
- Sainsbury's – Striking a Balance
- > – Morrisons – 'Fresh for less'
- Waitrose – Ethical extremism
- Discounters – Threat postponed
- M&S – Always the Bridesmaid
- Home Delivery



[Offers](#)[Market Street](#)[Food](#)[Drink](#)[Family life](#)[Fresh Food](#)

Market Street

[Fishmonger](#)[Greengrocer](#)[Family Butcher](#)[Ask the butcher](#)[Meet the butcher](#)[Lamb top tips](#)[Best value beef cuts](#)[100% British fresh pork, beef and lamb](#)[Best value pork cuts](#)[The Bakery](#)[The Delicatessen](#)[The Cake Shop](#)[Fresh to go](#)[Oven Baked](#)

Family Butcher

[Add to binder](#)

We're the only supermarket that sells 100% British fresh pork, beef and lamb. We also cut, prepare and package the majority of our fresh meat in-store too. Which means when you pick up a steak or a joint of meat in **your local Morrisons**, it's more than likely to have been cut and packed by one of the fully trained butchers you can see working behind our meat counter. [Find out more about why we only sell 100% British fresh pork, beef and lamb.](#)

[Offers](#)[Market Street](#)[Food](#)[Drink](#)[Family life](#)[Fresh Food](#)

Market Street

[Fishmonger](#)[Greengrocer](#)[Family Butcher](#)[Ask the butcher](#)[Meet the butcher](#)[Lamb top tips](#)[Best value beef cuts](#)[100% British fresh pork, beef and lamb](#)[Best value pork cuts](#)[The Bakery](#)[The Delicatessen](#)[The Cake Shop](#)[Fresh to go](#)[Oven Baked](#)

100% British fresh pork, beef and lamb

[Add to binder](#)

At Morrisons, we're passionate about supporting British farmers. That's why, since March 2008, we only sell 100% British fresh pork, beef and lamb. Our 100% British fresh pork is farm assured under the British Quality Assured Pork Scheme (BQAP), as is our 100% British deli bacon – perfect for our warming [cauliflower cheese with crispy bacon](#).

[Offers](#)[Market Street](#)[Food](#)[Drink](#)[Family life](#)[Fresh Food](#)

Market Street

Fishmonger

[Meet the fishmonger](#)[Buying and cooking fish](#)[Sustainable fishing](#)[Greengrocer](#)[Family Butcher](#)[The Bakery](#)[The Delicatessen](#)[The Cake Shop](#)[Fresh to go](#)[Oven Fresh](#)

Fishmonger

[Add to binder](#)

At Morrisons we're proud of our fresh fish. We offer more than 50 different varieties of fish, and over 1200 fully trained in-store fishmongers to help you choose and prepare your fish, all at great value prices. What's more, we guarantee **our fresh fish is exactly that - fresh, and never frozen**. Have a look at our latest TV ad as Robert Lindsay buys delicious fish every day of the week.

[Offers](#)[Market Street](#)[Food](#)[Drink](#)[Family life](#)[Fresh Food](#)

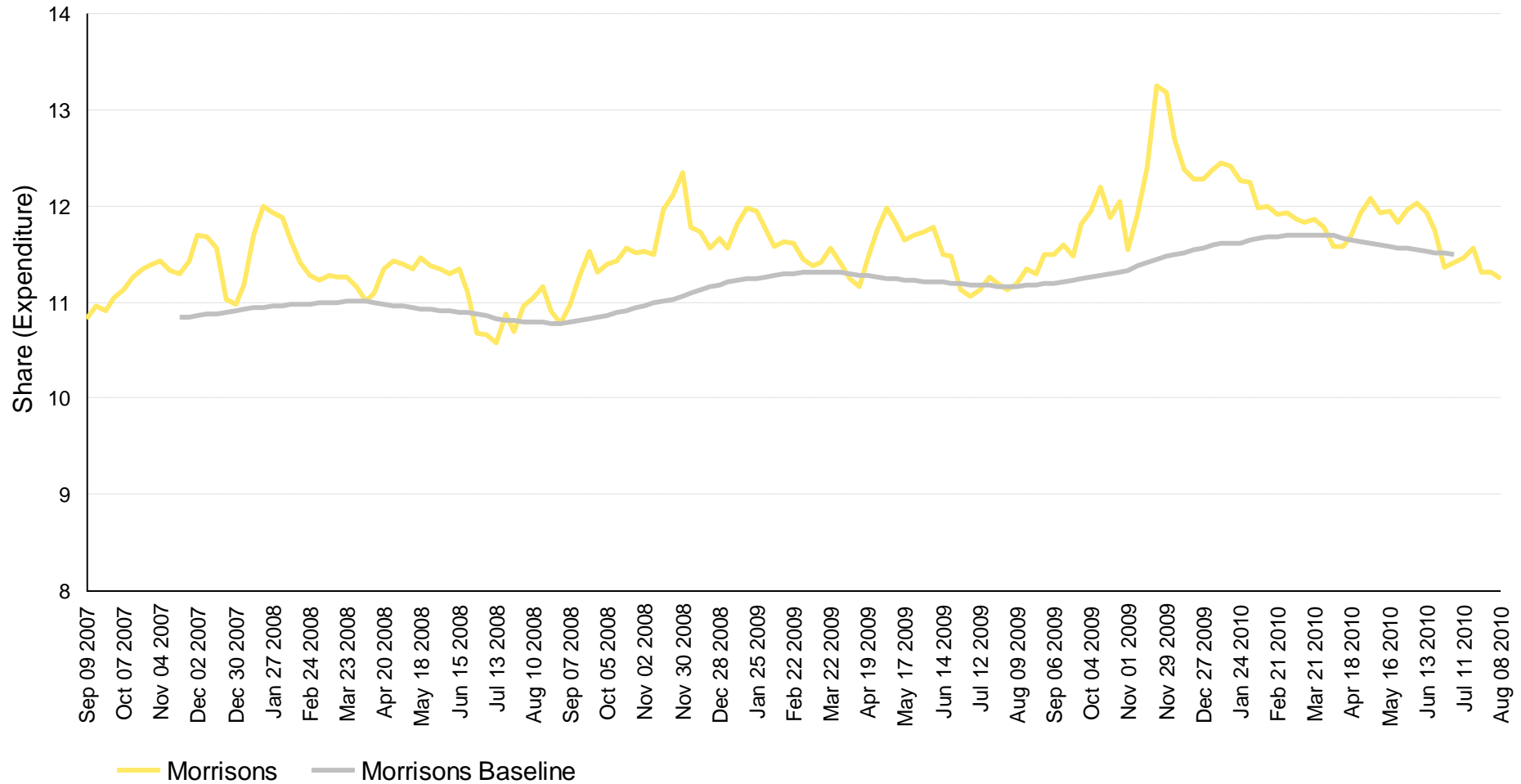
Home

Over 350
products in our
VALUE range

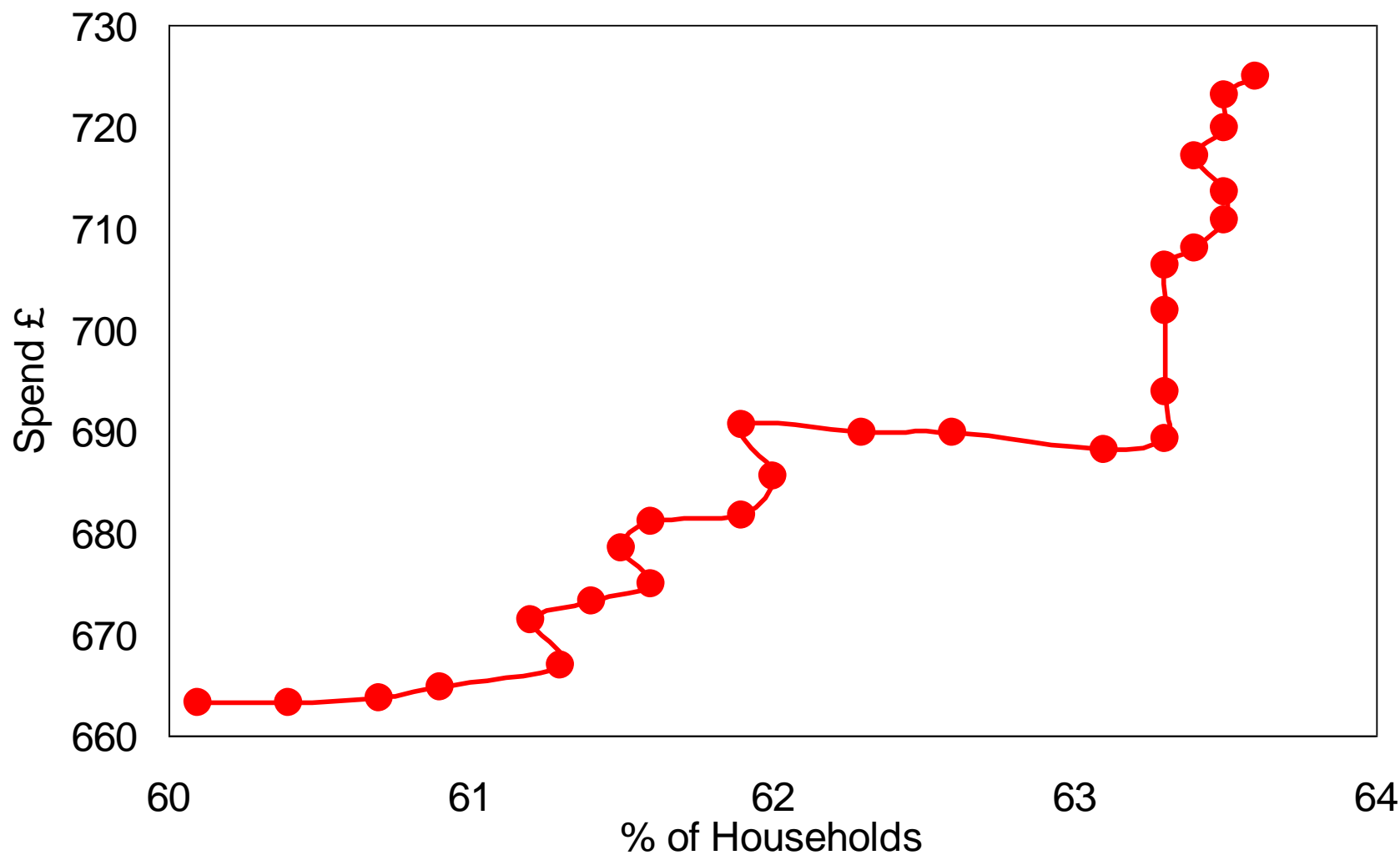
Get value for money with our Value range

Save on over 350 daily essentials from garden peas to man-size tissues at your local Morrisons.

Morrison Share of Till Roll Grocers

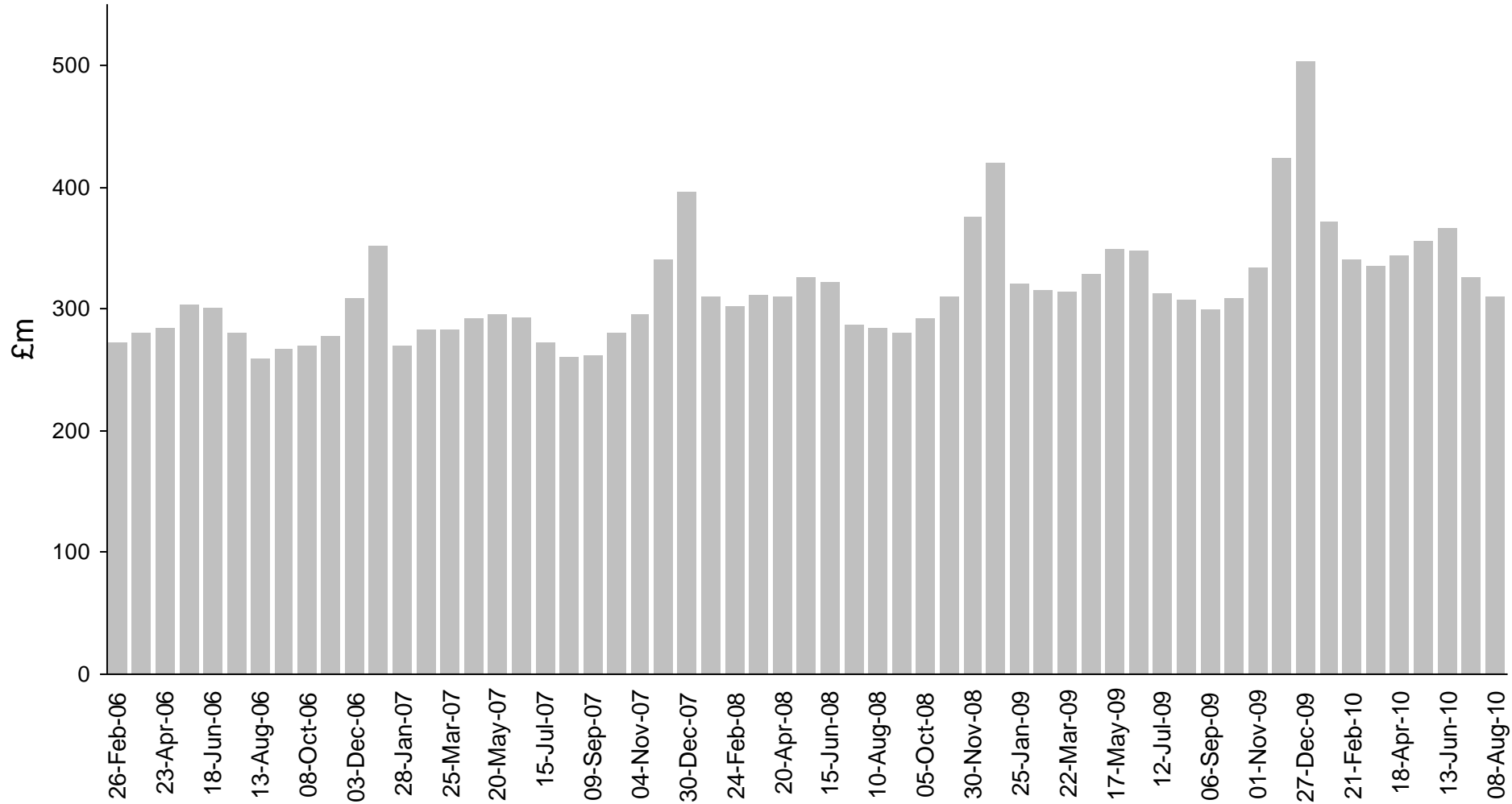


Morrisons - Shoppers vs. Spend

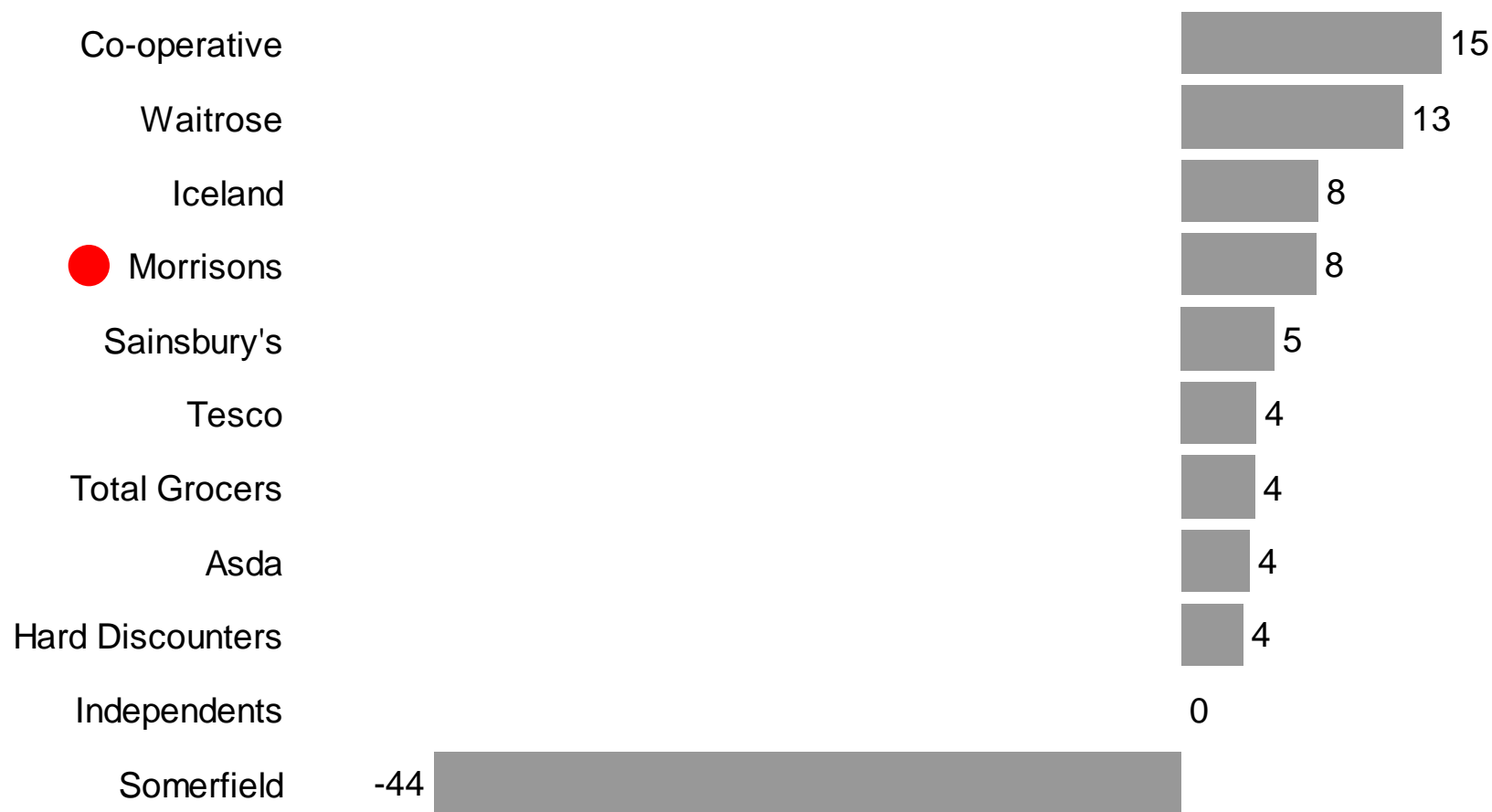


27 x 52 weekly periods ending Aug 08 2010

Shopping Missions - Trolley Full Store Sales

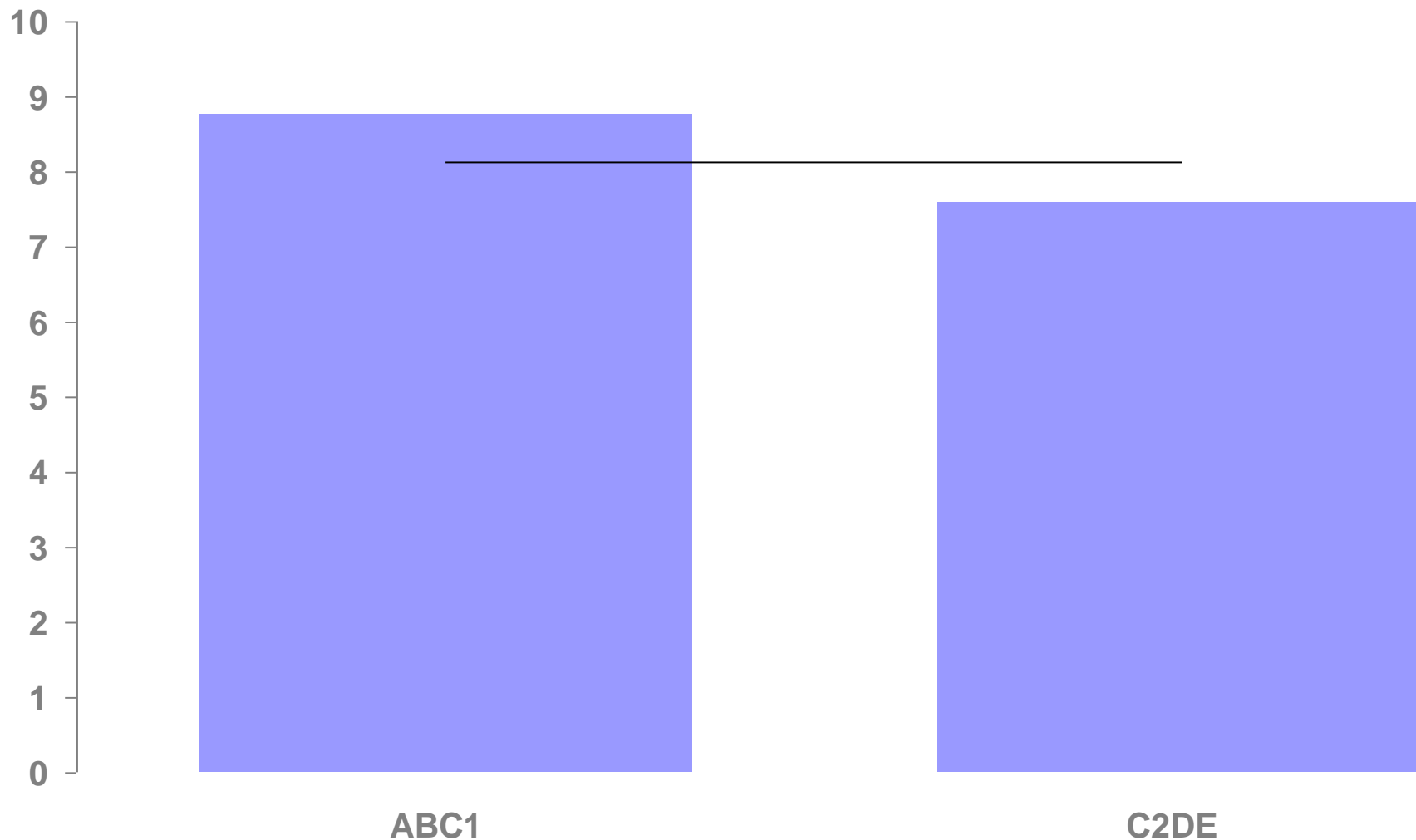


Annual Till Roll Totals Expenditure Trends



52 w/e Aug 08 2010 y/y % Change

Morrisons Turnover Growth 52 w/e Jul 11 2010 - % chg

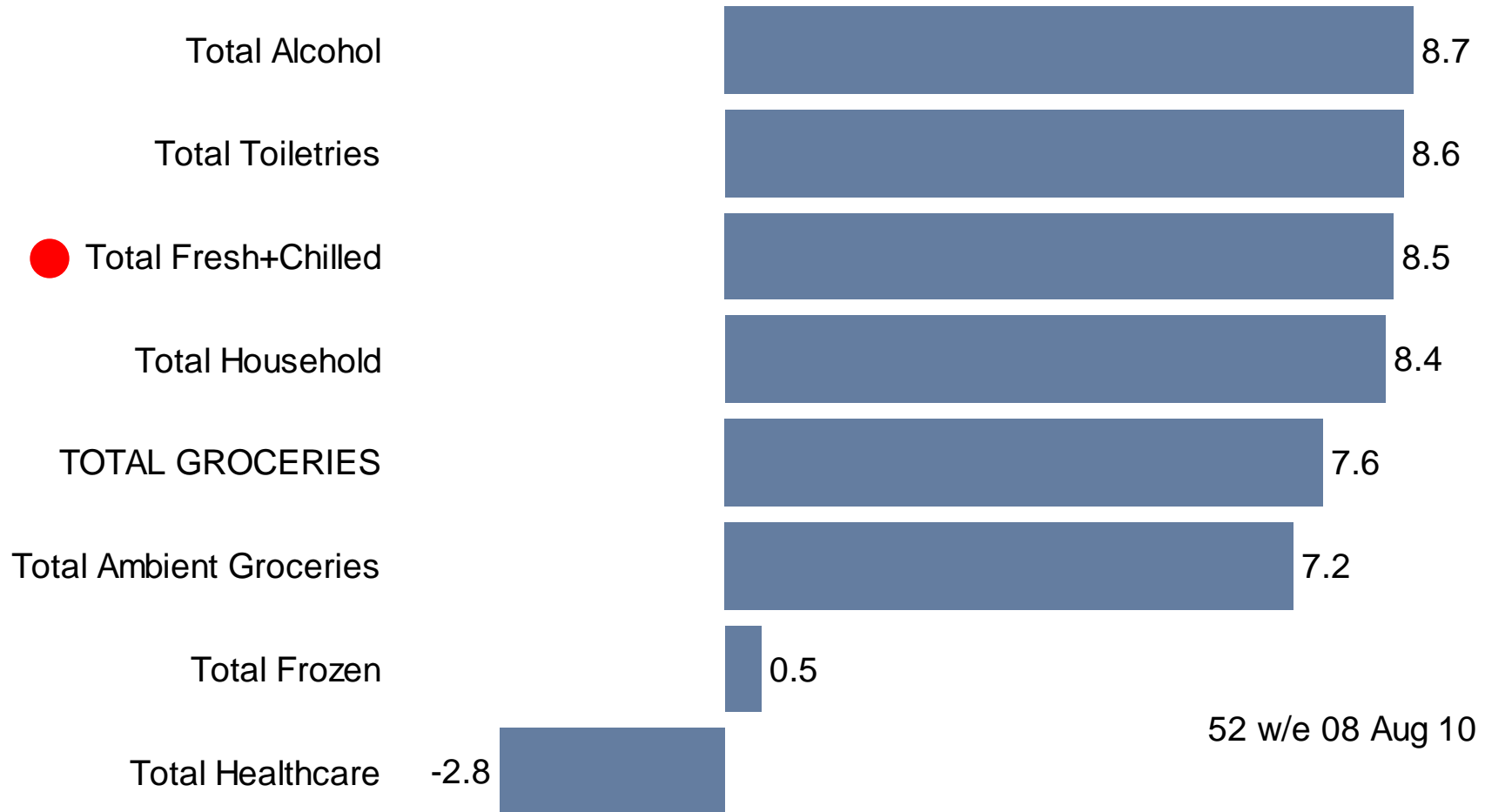


Broad Areas indexed on Total Groceries

● Total Fresh+Chilled	104
Total Ambient Groceries	102
Total Household	100
Total Toiletries	93
Total Alcohol	93
Total Frozen	86
Total Healthcare	80

Year-on-Year Expenditure Trends - % change

Morrisons

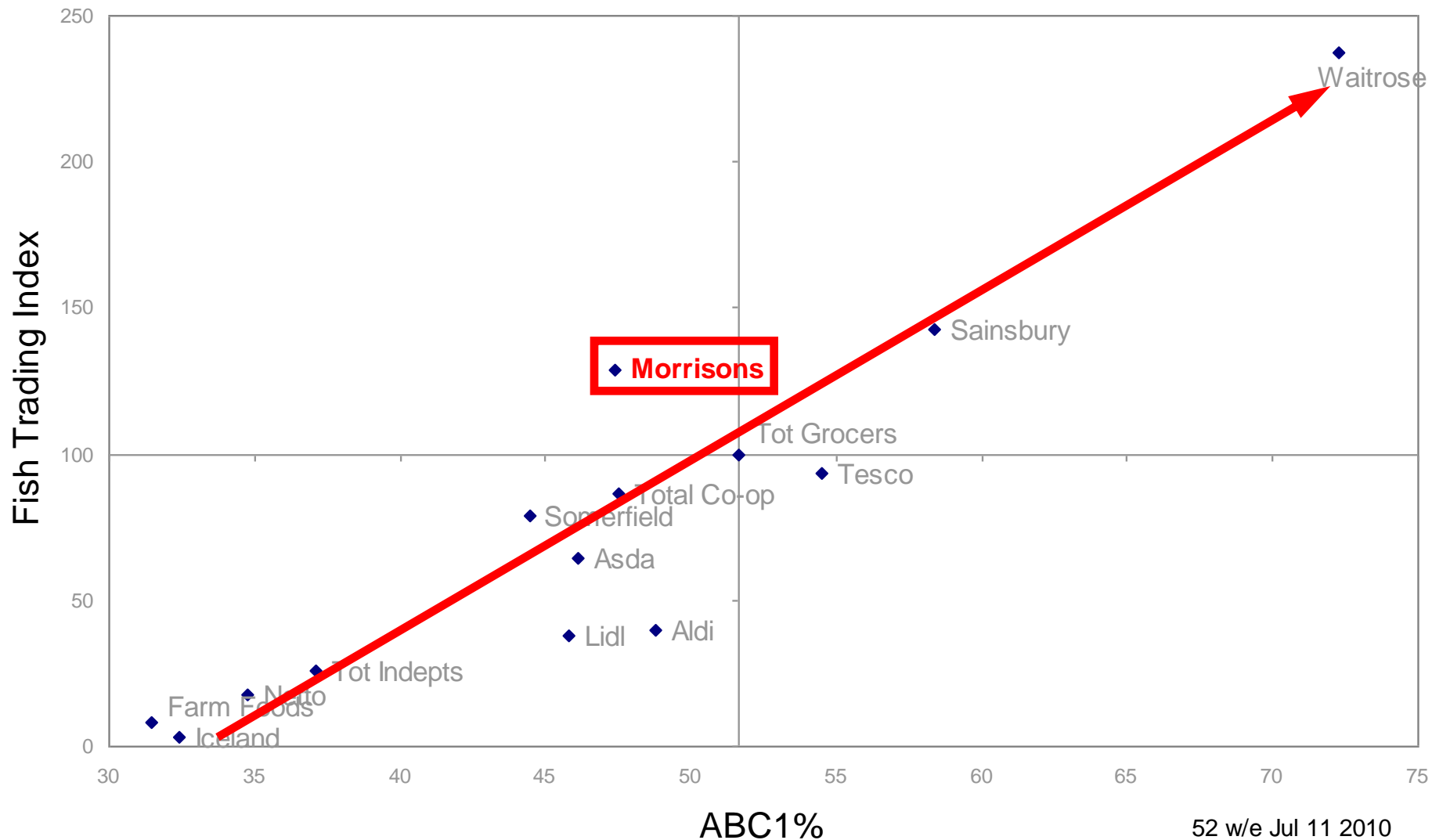


52 w/e 08 Aug 10

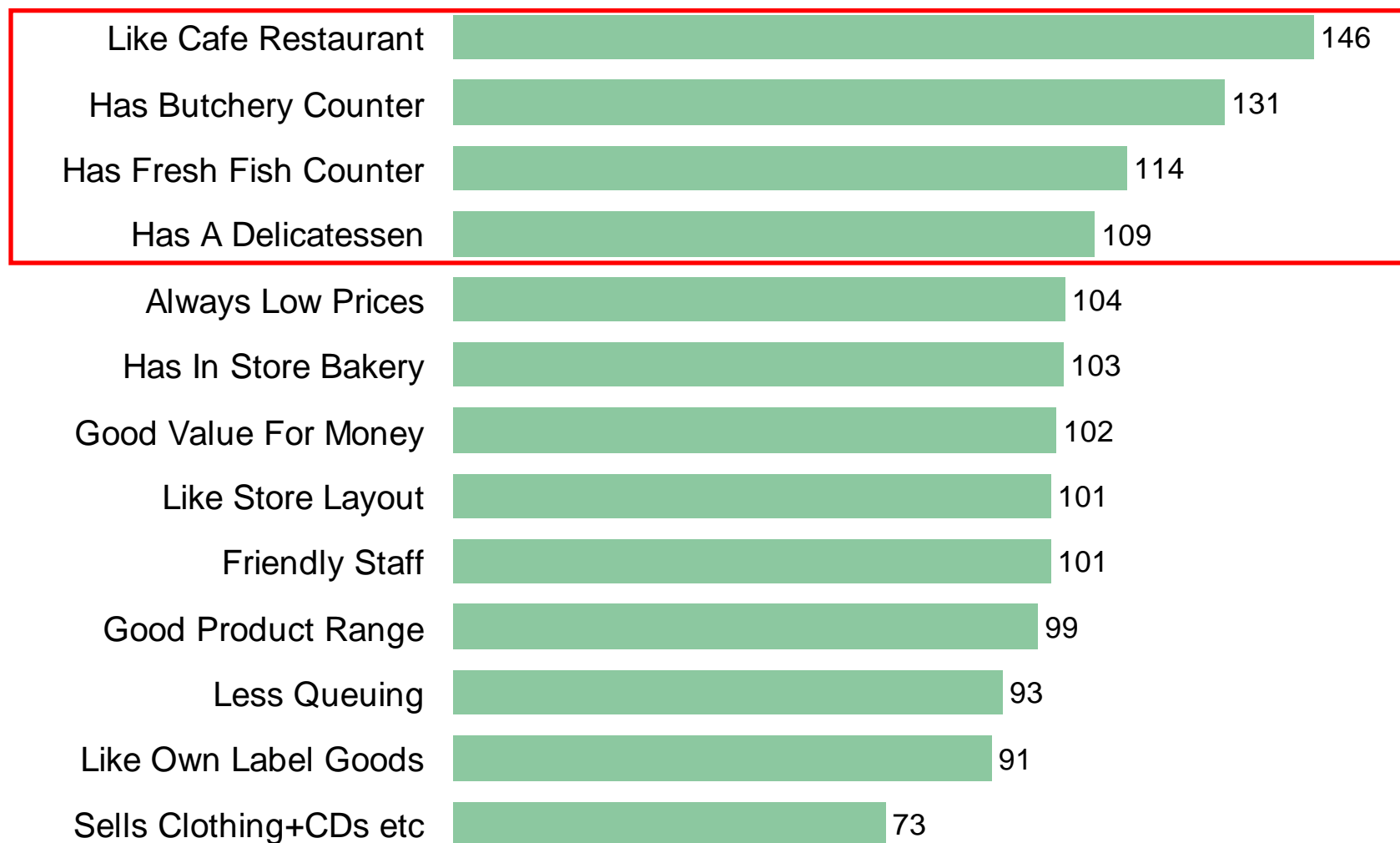
Market Sectors indexed on Total Groceries

● Fresh Fish	128
● Chilled Bakery Products	121
● Fresh Meat	118
Canned Goods	115
Biscuits	109
● Fresh Poultry+Game	109
Hot Beverages	107
● Chilled Convenience	107
Pet Care	106
Savoury Home Cooking	105

The Fish Index



Reasons for Store Choice - Morrisons



On-line Questionnaire - Outlet Share Index 52 w/e Jul 11 2010

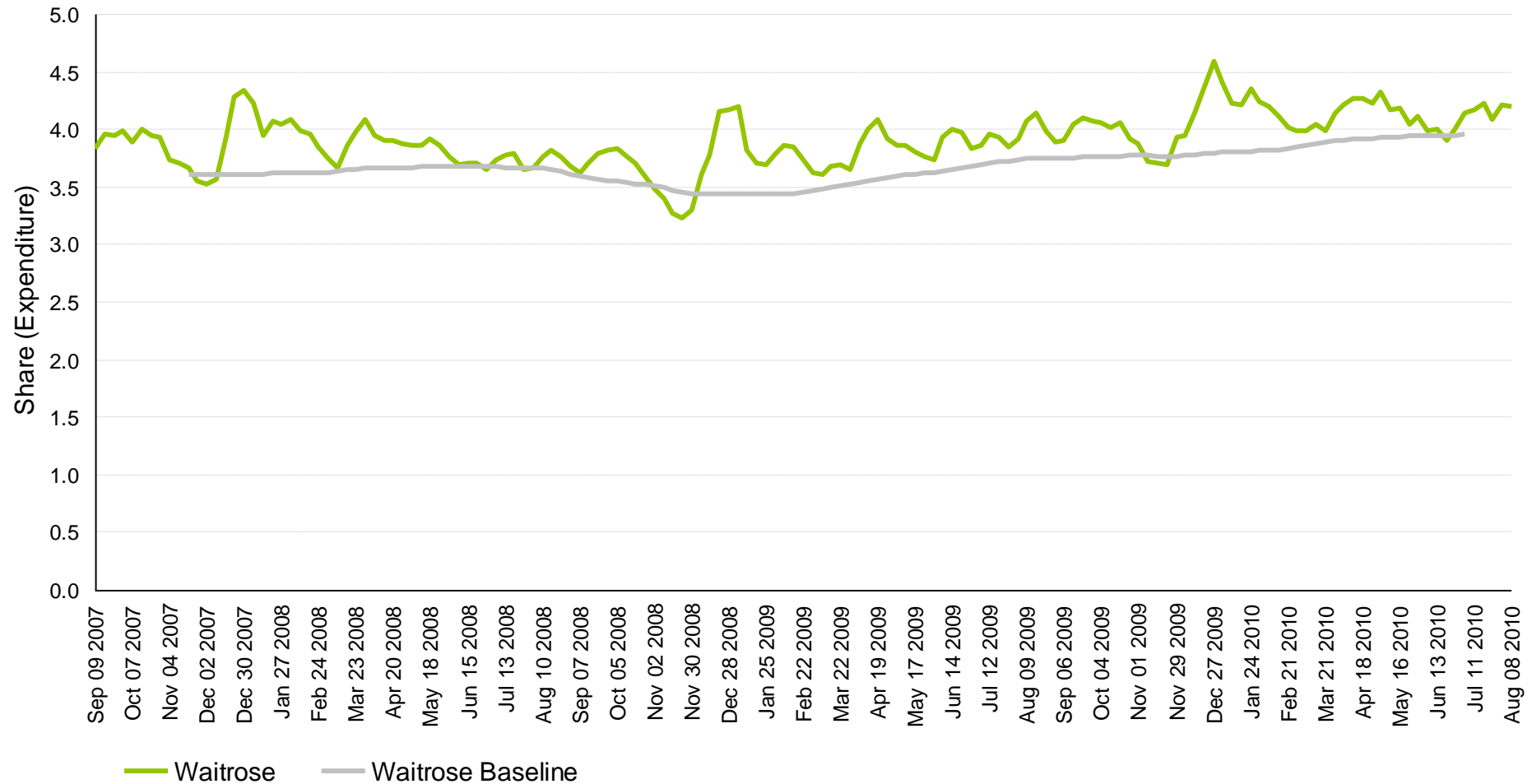
The Agenda

- A sense of proportion returns
- Tesco – Never complacent
- Asda – Price and/or Quality
- Sainsbury's – Striking a Balance
- Morrisons – 'Fresh for less'
- > – Waitrose – Ethical extremism
- Discounters – Threat postponed
- M&S – Always the Bridesmaid
- Home Delivery

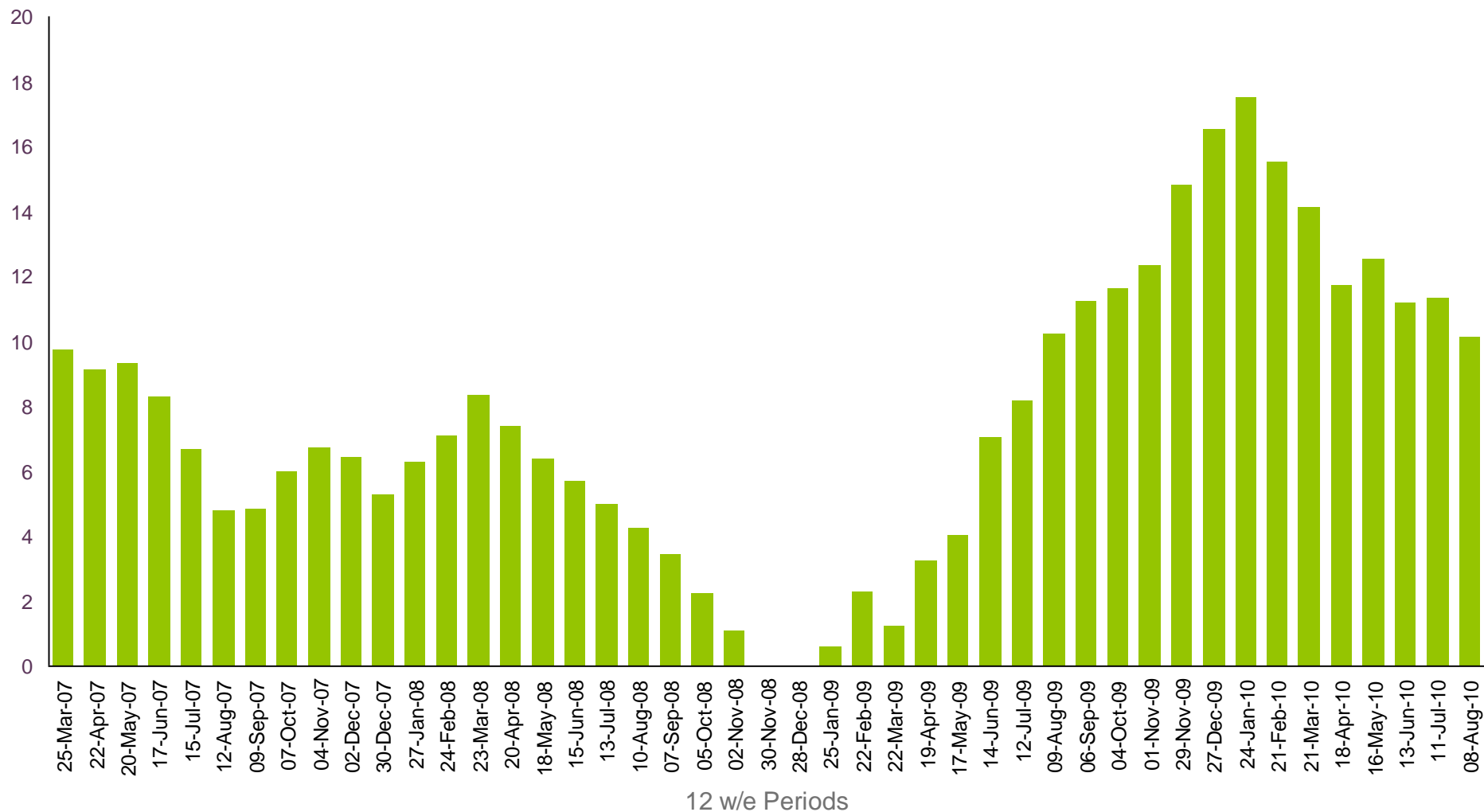


Waitrose Share of Till Roll Grocers

Waitrose



Waitrose Year-on-Year Trends - Till Roll £%



Waitrose Share Index

	I regard myself as a connoisseur of food and wine	212
●	I am prepared to pay more for organic food	181
●	I actively seek out fair trade products	162
	The brand name of the clothes I wear is important to me	158
●	I try to buy environmentally friendly products	140
●	I try to buy local product whenever I can	135
	It is important to me what brand I buy	133
	I/my partner enjoy cooking to entertain friends and family	127
	I am more likely to buy a HBA product if it is made of more natural ingredients	126
	I regularly take active exercise	123
	I stick with a brand I usually buy than try something I am not very sure of	123
	I find the amount of recycling now too confusing	122
	I have a pastime/hobby that is an important part of my life	122
	I am willing to travel further to shop at the supermarket I prefer	120
	I am always looking out for health & beauty products with new added benefits	119
	The way I look is extremely important to me	118
	I try to lead a healthy lifestyle	115
	If usual item is not available than I buy another size rather than change brands	115
	I regularly use different types of media to keep up with the latest fashion trends	114
	I think I will be doing more of my grocery shopping online in the future	113

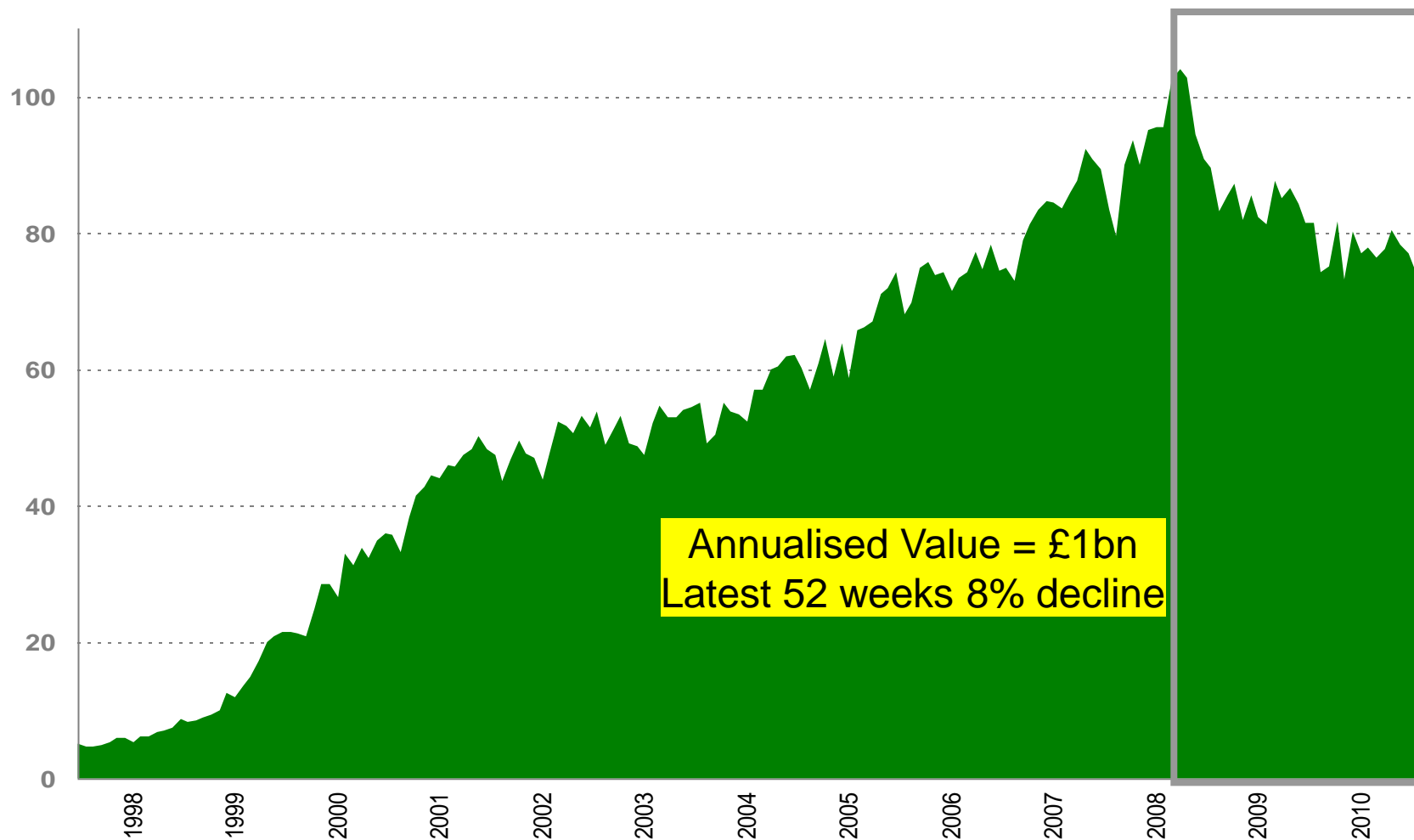
Share indexed on All Shoppers – 52 w/e Feb 21 2010

Organic

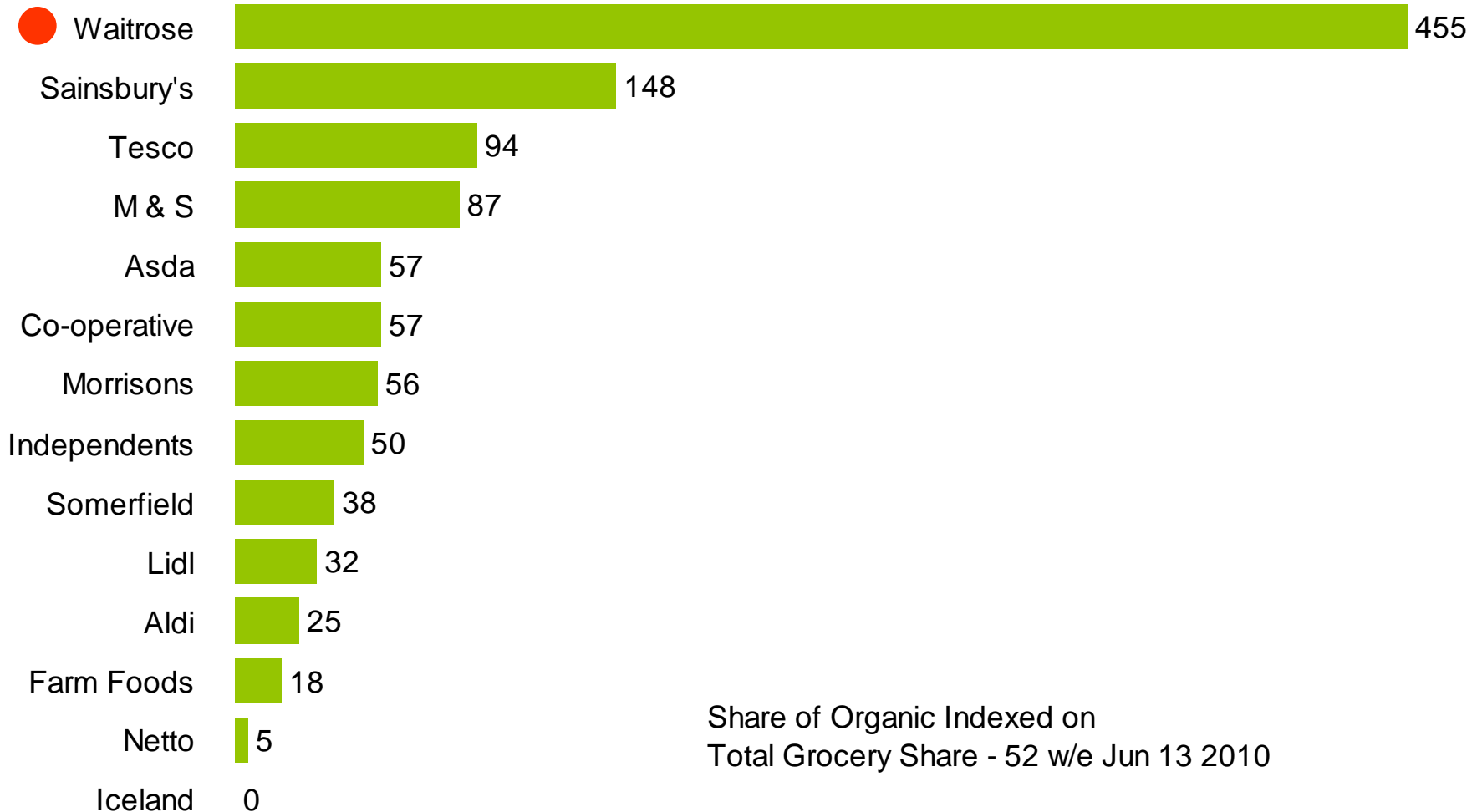


Total Organic Products

£m's

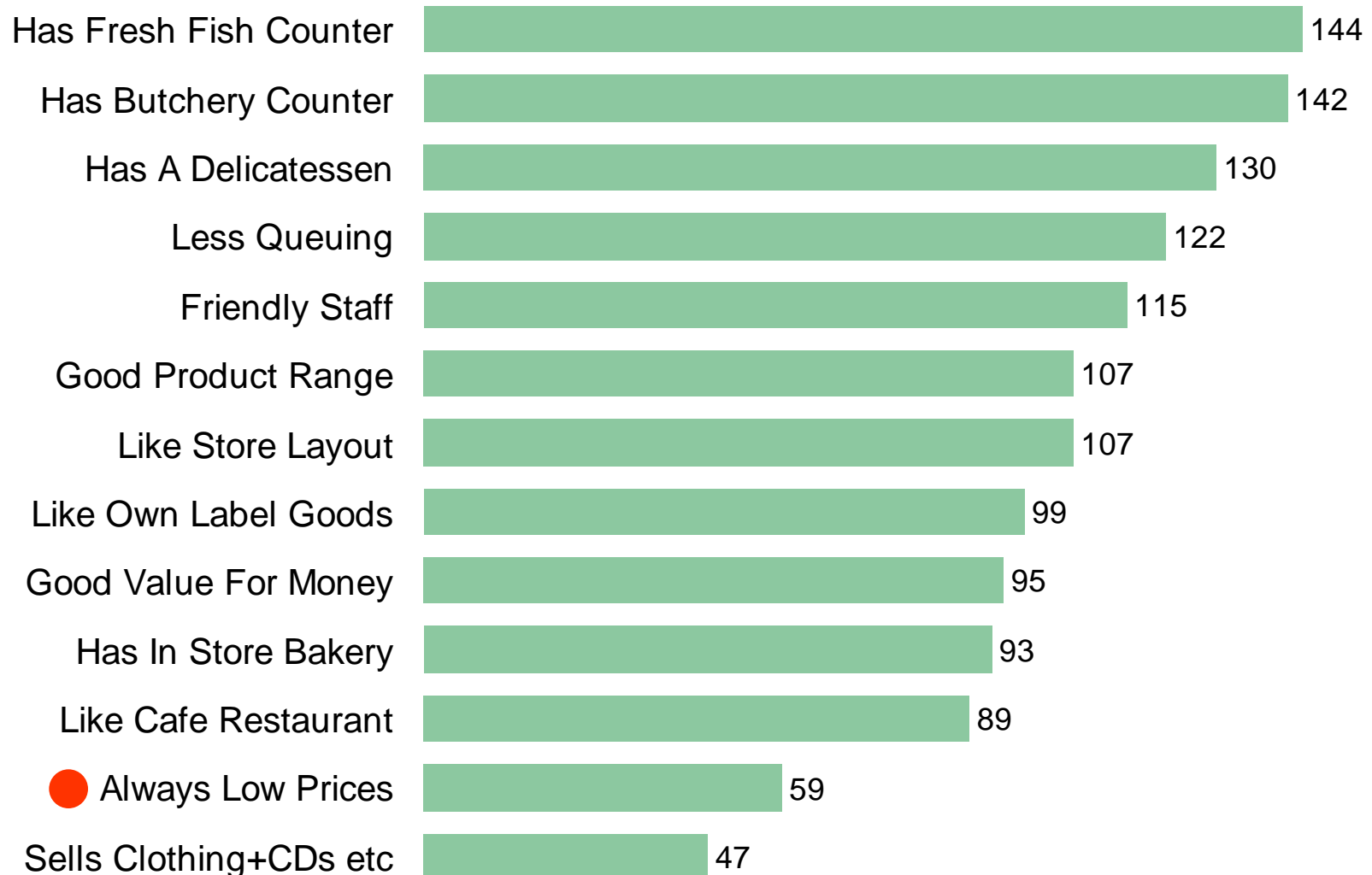


Organic Trading Indices



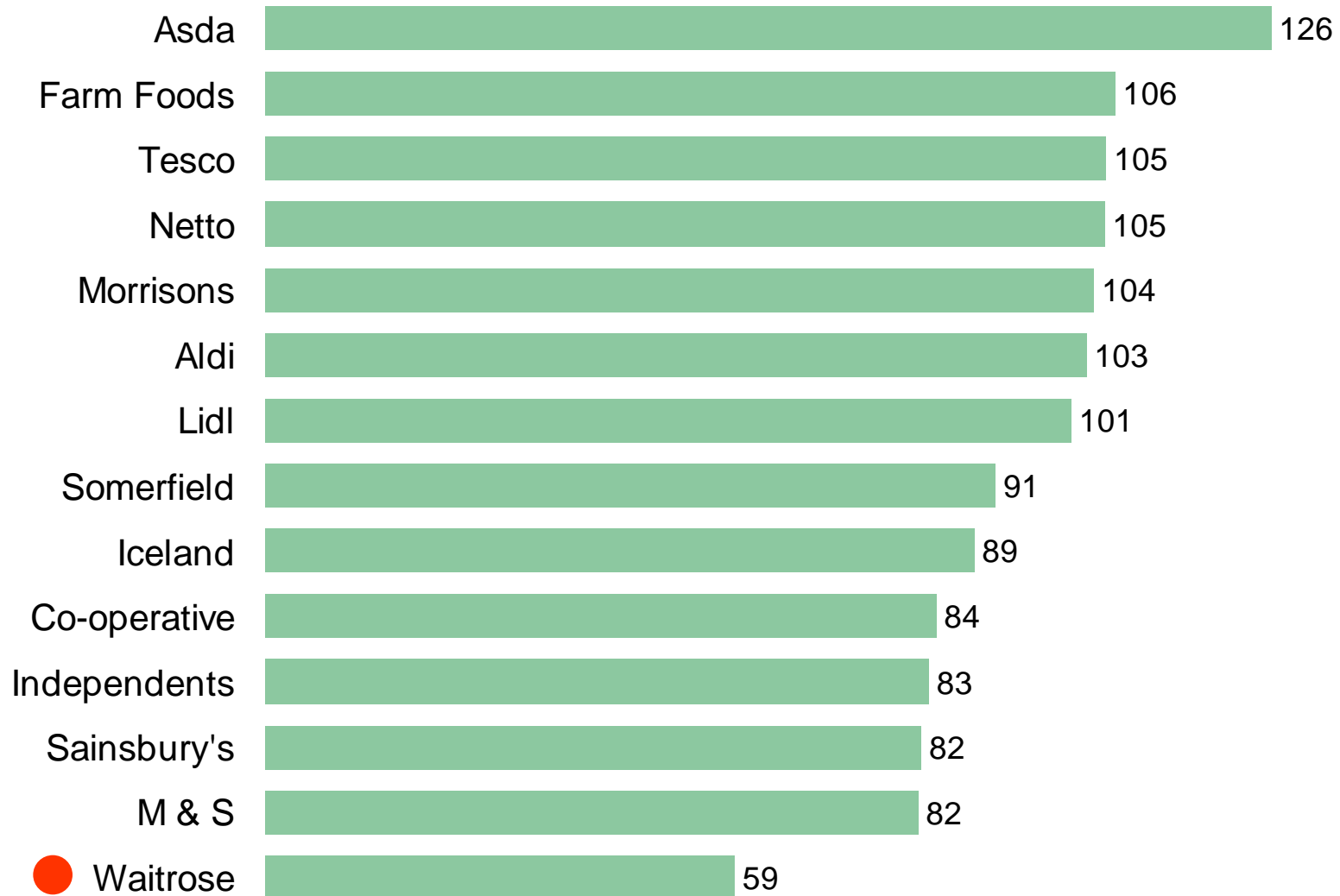
Share of Organic Indexed on
Total Grocery Share - 52 w/e Jun 13 2010

Reasons for Store Choice - Waitrose



On-line Questionnaire - Outlet Share Index 52 w/e Jul 11 2010

Reasons for Store Choice - Low Prices



On-line Questionnaire - Outlet Share Index 52 w/e Jul 11 2010

Broad Area

● Total Fresh+Chilled	126
Total Ambient Groceries	91
Total Household	89
Total Alcohol	85
Total Frozen	58
Total Toiletries	48
Total Healthcare	40

Market Sector

● Fresh Fish	237
Chilled Bakery Products	165
Chilled Drinks	161
Chilled Convenience	139
● Fruit+Veg+Salads	138
Sweet Home Cooking	119
Fresh Meat	116
Hot Beverages	115
Fresh Poultry+Game	115
Frozen Confectionery	108
Packet Breakfast	106
Savoury Home Cooking	105

Market

● Chilled Gravy+Stock	765
● Fresh Stuffing	658
Mixers	524
● Chilled Olives	480
● Chilled Prepared Fish	477
● Chilled Salad Accomps	465
Hand Wash Products	446
Vegetable in Jar	417
● Fresh Soup	382
● Chilled Rice	336
● Chilled Pate+Paste+Spread	279
Ambient Olives	272
Tonic Water	266
Liquid+Grnd Coffee+Beans	257
● Chilled Cooking Sauces	251
● Chilled One Shot Drinks	242
Canned Lemonade	240
● Wet/Smoked Fish	239
● Chilled Vegetarian	231
Ginger Ale	227

Food & drink

Waitrose Deliver

Waitrose Wine Direct

Cooking and recipes

Food

Shop online at Waitrose

Ask our Nutritionist

Celebrities and articles

Food issues and policies

Palm oil

HVOs

GM

Sustainable fishing

World without fish

LEAF

Food Waste

Waste and recycling

Save Our Bacon

Waitrose organic and agricultural policy

Responsible sourcing

Fair trade for British farmers

Podcasts

Save our bacon

Climate Change

Product ranges

Origin of our food

Health and nutrition

Food seasonality

[Home](#) > [Food & drink](#) > [Food](#) > [Food issues and policies](#)[Save article to scrapbook](#)[Print](#)

Food issues and policies

Naturally, customers want to know the food they are eating is safe and healthy. They want to know where it comes from, how it has been produced and what it contains. And so does Waitrose.

Waitrose recently came out top... sustainable fishing

Waitrose recently came out top in the latest Marine Conservation Society (MCS) League Table. The survey examines the main UK supermarkets' commitment to sourcing fish from responsibly managed fisheries.

[SUSTAINABLE FISHING](#)

Calculated against criteria which include the policies that inform supermarkets' buying decisions and the sustainability of fish sold, the MCS League Table placed Waitrose in joint first place with Marks & Spencer. As well as being awarded a distinction for its dedication, Waitrose was commended for not selling any fish from the MCS List of Fish to Avoid and sourcing the greatest number of fish from the MCS Fish to Eat List (26 species).

In 2006, Waitrose became the first UK supermarket to sell only line-caught fresh and smoked cod and haddock in place of trawled net fish. It was also the first retailer to announce its intention to remove beam trawled fish from its assortment. Read more about [our sustainable fishing policy](#) here.

[Listen to our sustainable fish podcast](#) and leave a comment in our forum.

Food & drink

Waitrose Deliver

Waitrose Wine Direct

Cooking and recipes

Food

Shop online at Waitrose

Ask our Nutritionist

Celebrities and articles

Food issues and policies

Product ranges

Origin of our food

Foundation

Foundation Blog

Fairtrade

Sourcing British food

Farming

Health and nutrition

Food seasonality

Organics

Drink

[Home](#) > [Food & drink](#) > [Food](#) > [Origin of our food](#)

[Save article to scrapbook](#)

[Print](#)

Origin of our food

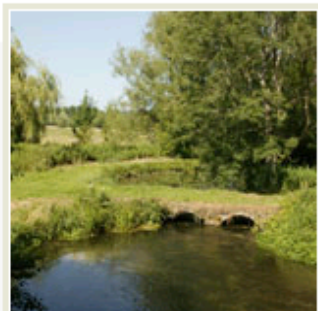
In ensuring fresh, quality and safe products we put provenance, traceability and responsible sourcing first and foremost.



Traceability is key...

...which is why Waitrose knows every farm and farmer who supplies every pack of our British pork, bacon and sausages. We know the parentage and history of the Aberdeen Angus and Hereford animals supplying its beef; and we know the origin of every own-label free range egg and pint of milk – claims that few supermarkets can make.

[Read about Waitrose meat](#)



Committed to supplying food of the highest quality...

...we have owned our own farm for over 70 years – the 4,000-acre Leckford Estate supplies mushrooms, free range eggs, flour, honey, apples and Select Farm milk to Waitrose shops.

[Read about our Leckford farm](#)



Where possible Waitrose buys British...

...which is why our strawberries between June and September come from British fields and why 89% of eight food staples, which include beef, chicken, apples and potatoes, are sourced from Britain.

Waitrose Deliver
Waitrose Wine Direct
Cooking and recipes

▼ Food

Shop online at Waitrose
Ask our Nutritionist
Celebrities and articles
Food issues and policies

▼ Product ranges

Meat
Poultry

▼ Fish

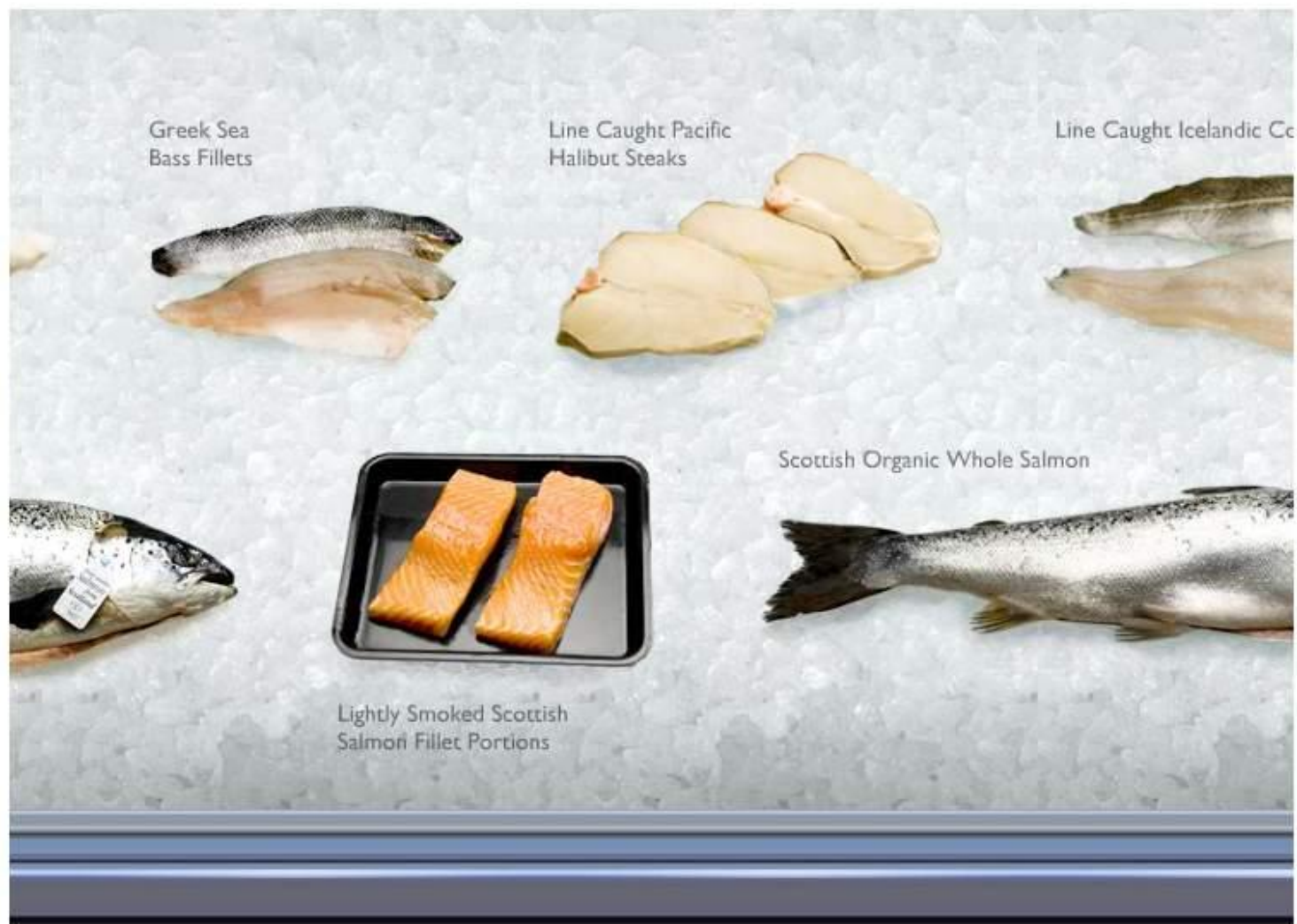
Select Farm salmon

► Interactive Fish

10 reasons to eat more fish
Your questions
Meet a specialist
Serving fish with wine
Balancing the scales
Garnish & Go

Dairy
Fruit and vegetables
Ingredients
essential Waitrose
Ready prepared
Healthier choices
Frozen food
Chocolate

Fish of the Day



Food & drink

[Waitrose Deliver](#)

[Waitrose Wine Direct](#)

[Cooking and recipes](#)

Food

[Shop online at Waitrose](#)

[Ask our Nutritionist](#)

[Celebrities and articles](#)

[Food issues and policies](#)

[Product ranges](#)

[Origin of our food](#)

[Health and nutrition](#)

[Food seasonality](#)

Organics

[Organic podcast](#)

[Waitrose organics worldwide](#)

[Organic producers](#)

[Organic questions and answers](#)

[Drink](#)

[Home](#) > [Food & drink](#) > [Food](#) > [Organics](#)

[Save article to scrapbook](#)

[Print](#)

Waitrose Organic

We stock over 1600 organic products - one of the largest and broadest ranges in the UK and many of them are Fairtrade too. By buying Waitrose organic you can be assured that the products not only taste fantastic but have been responsibly sourced.



The Waitrose Organic Commitment

At Waitrose our commitment goes much further than simply buying from producers and selling on to our customers. It is a whole philosophy and we have established several unique initiatives to reflect this. We support organic research and development and sponsor organic excellence awards. This shows true commitment, which we hope will encourage more and more farmers and customers to understand that, at Waitrose, organic food is much more than just a passing trend.

[Find out more about organic products at Waitrose.](#)

Links

[Sugarloaf pineapple](#)

[Organic recipes](#)

[A whole world of organics](#)

[Talking organics](#)



For more information on organic food

[The Department for Environment, Food and Rural Affairs](#)

Waitrose

[Entire site](#)[Recipes only](#)[SEARCH](#)[SHOP ONLINE](#)[ENTERTAINING](#)[FOOD & DRINK](#)[INSPIRATION](#)[SUM](#)

essential Waitrose®

Introducing the new essential range
from Waitrose with the quality you
would expect at prices you wouldn't

[Discover the essential range ▶](#)[▶ Play](#)

DO YOU PASS THE POSH TEST?

Answer yes to three or more of these and you are considered posh...

	YES	NO		YES	NO
1 Do you go to the opera/ballet ?	<input type="checkbox"/>	<input type="checkbox"/>	7 Do you shop at Waitrose?	<input type="checkbox"/>	<input type="checkbox"/>
2 Do you have a cleaner?	<input type="checkbox"/>	<input type="checkbox"/>	8 Do you say 'supper' instead of dinner?	<input type="checkbox"/>	<input type="checkbox"/>
3 Do you wear clothing brands such as Hackett and Barbour ?	<input type="checkbox"/>	<input type="checkbox"/>	9 Do you greet people with a kiss on both cheeks?	<input type="checkbox"/>	<input type="checkbox"/>
4 Do you have an interest in horses/sailing?	<input type="checkbox"/>	<input type="checkbox"/>	10 Do you have an Aga?	<input type="checkbox"/>	<input type="checkbox"/>
5 Do you spend over £10 on a bottle of wine ?	<input type="checkbox"/>	<input type="checkbox"/>	11 Do you drink Earl Grey/specialist teas?	<input type="checkbox"/>	<input type="checkbox"/>
6 Do you still tell people what school you went to even though you are in your 30s?	<input type="checkbox"/>	<input type="checkbox"/>	12 Do you know what Prosecco is?	<input type="checkbox"/>	<input type="checkbox"/>
			13 Do you eat hummus?	<input type="checkbox"/>	<input type="checkbox"/>

Source: Opinium Research

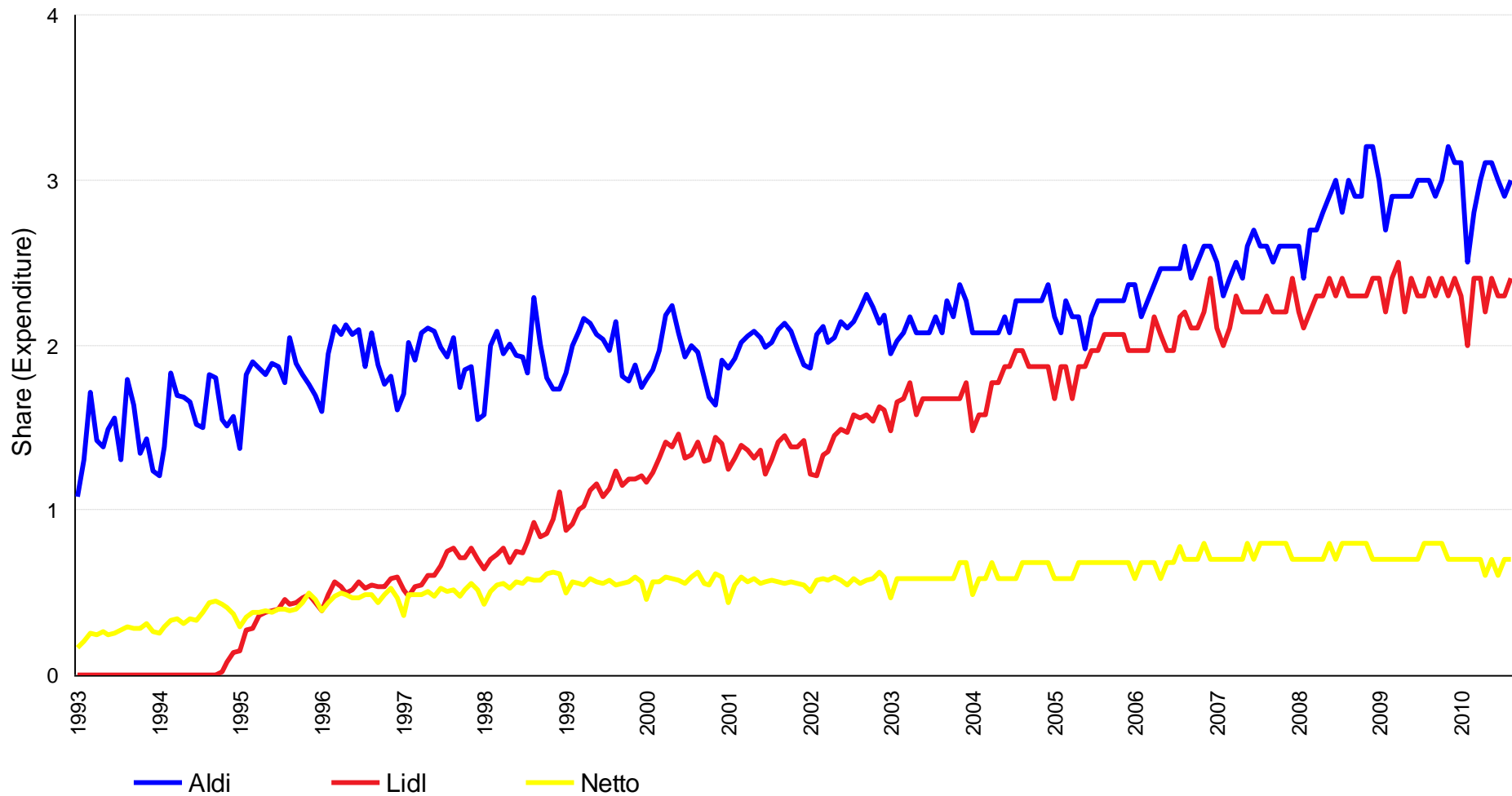
The Agenda

- A sense of proportion returns
- Tesco – Never complacent
- Asda – Price and/or Quality
- Sainsbury's – Striking a Balance
- Morrisons – 'Fresh for less'
- Waitrose – Ethical extremism
- > – Discounters – Threat postponed
- M&S – Always the Bridesmaid
- Home Delivery

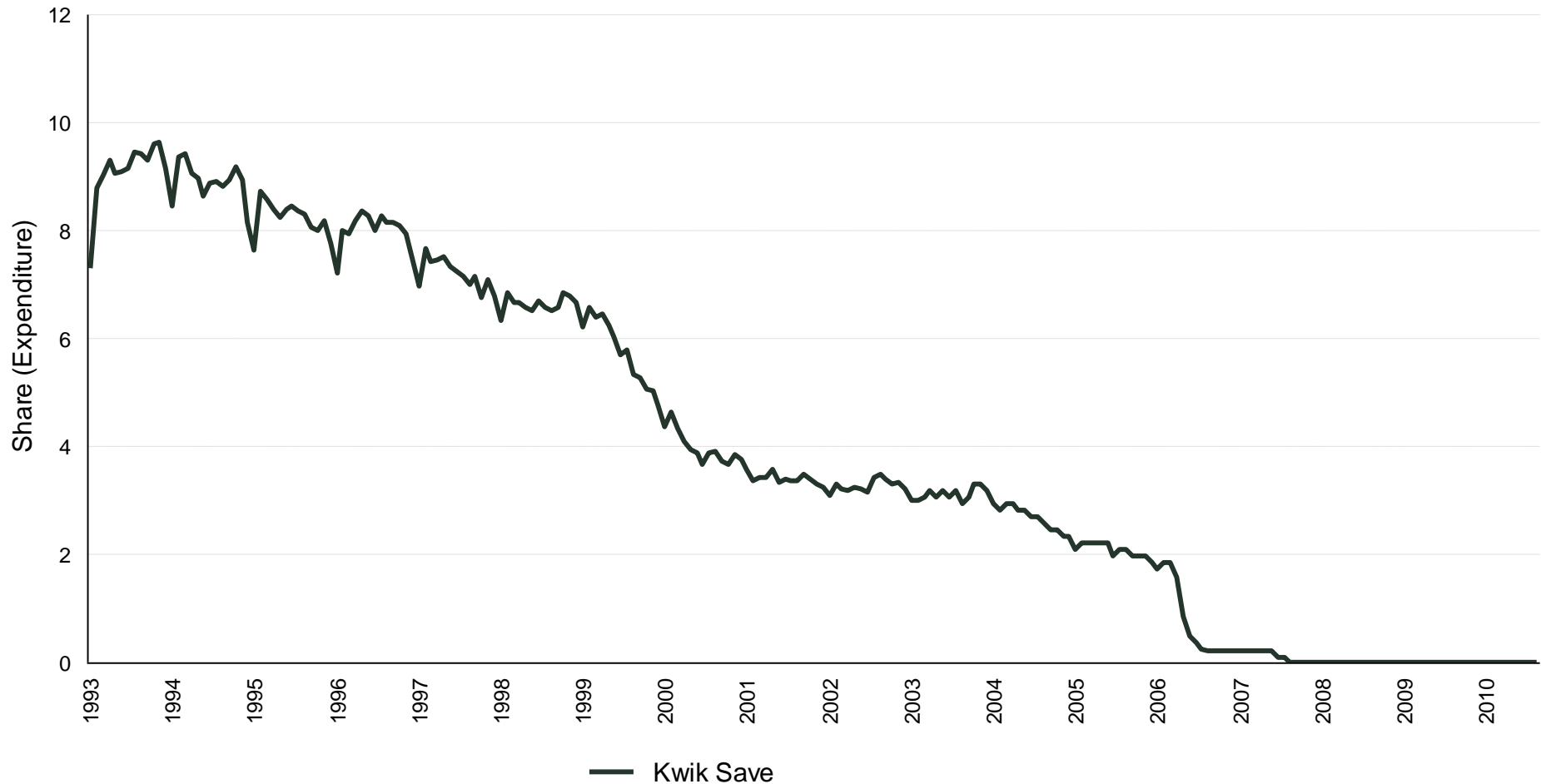




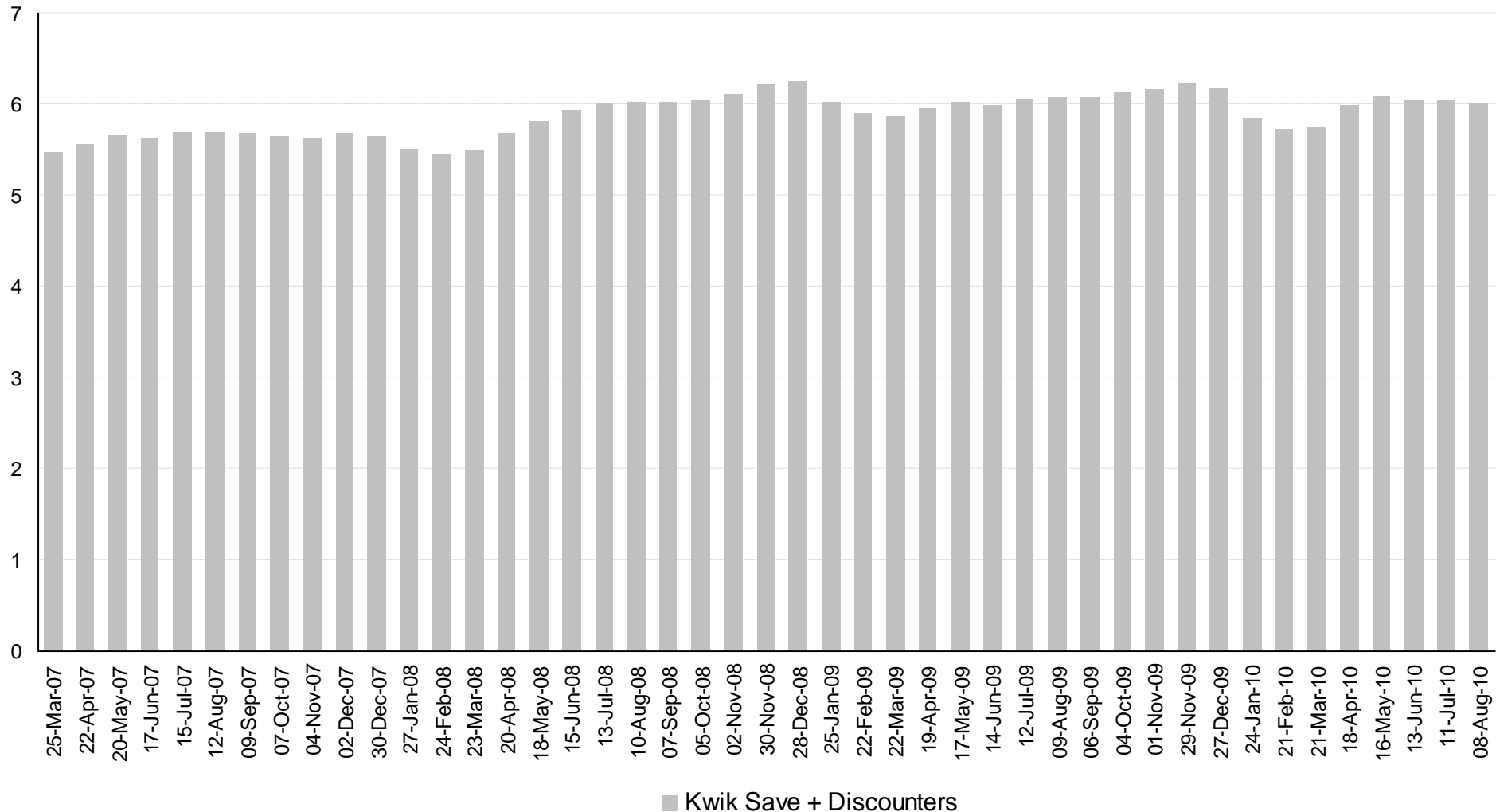
Long-Term Share of Till Roll Grocers



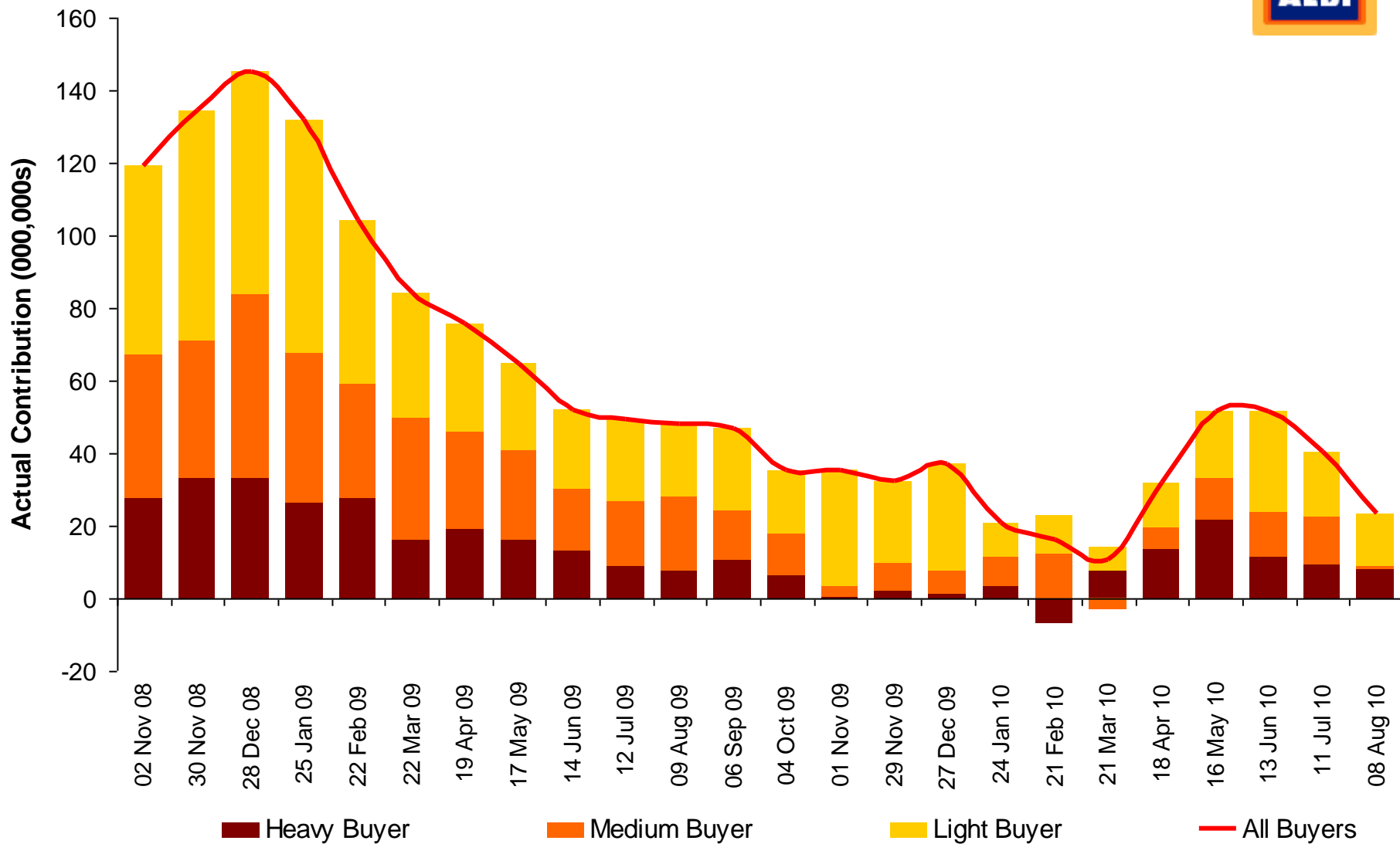
Kwik Save Share of Till Roll Grocers



Kwik Save + Discounters Combined Market Share £%



Aldi

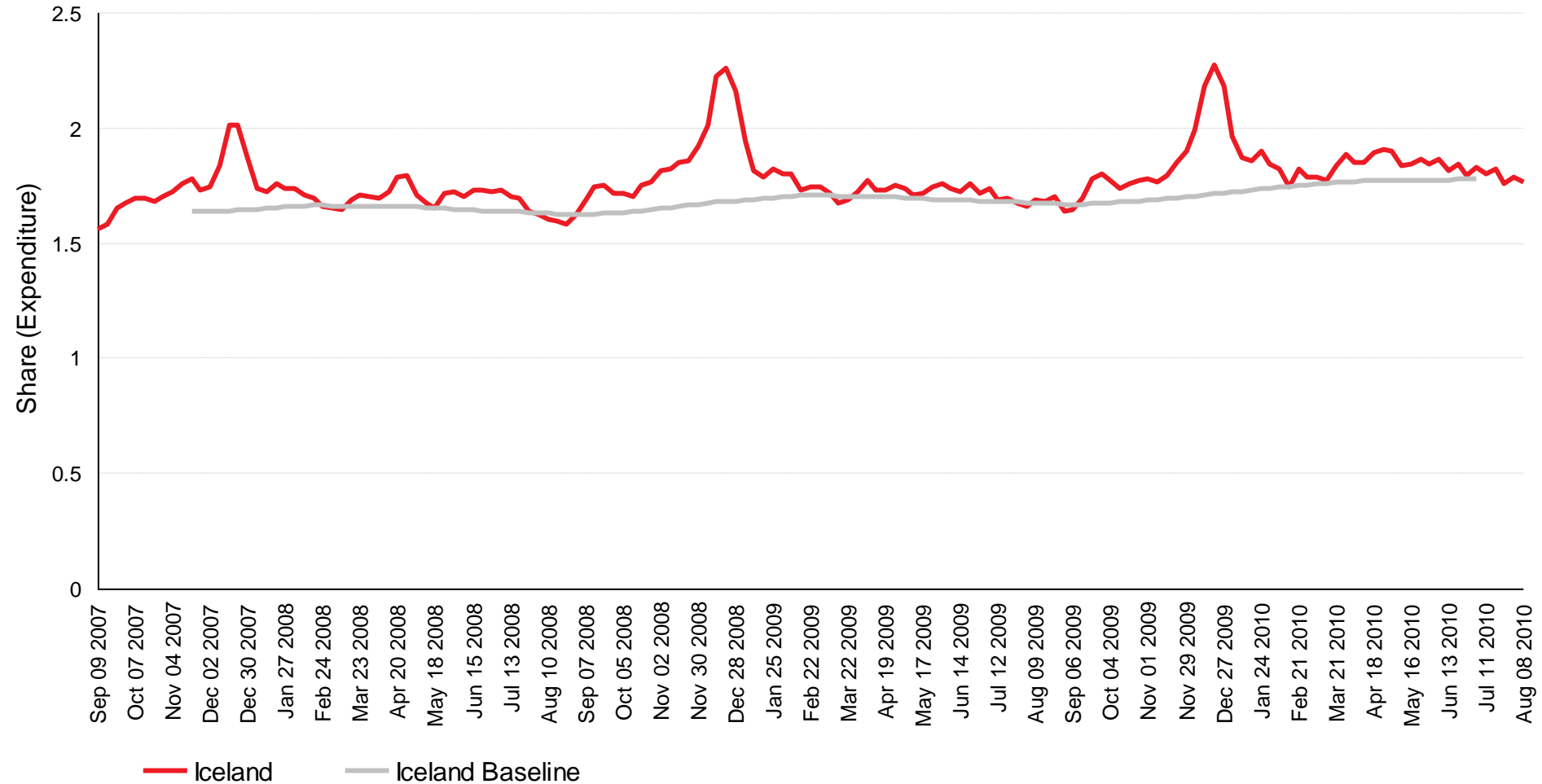


WOOLWORTHS

ALL STOCK
REDUCED!



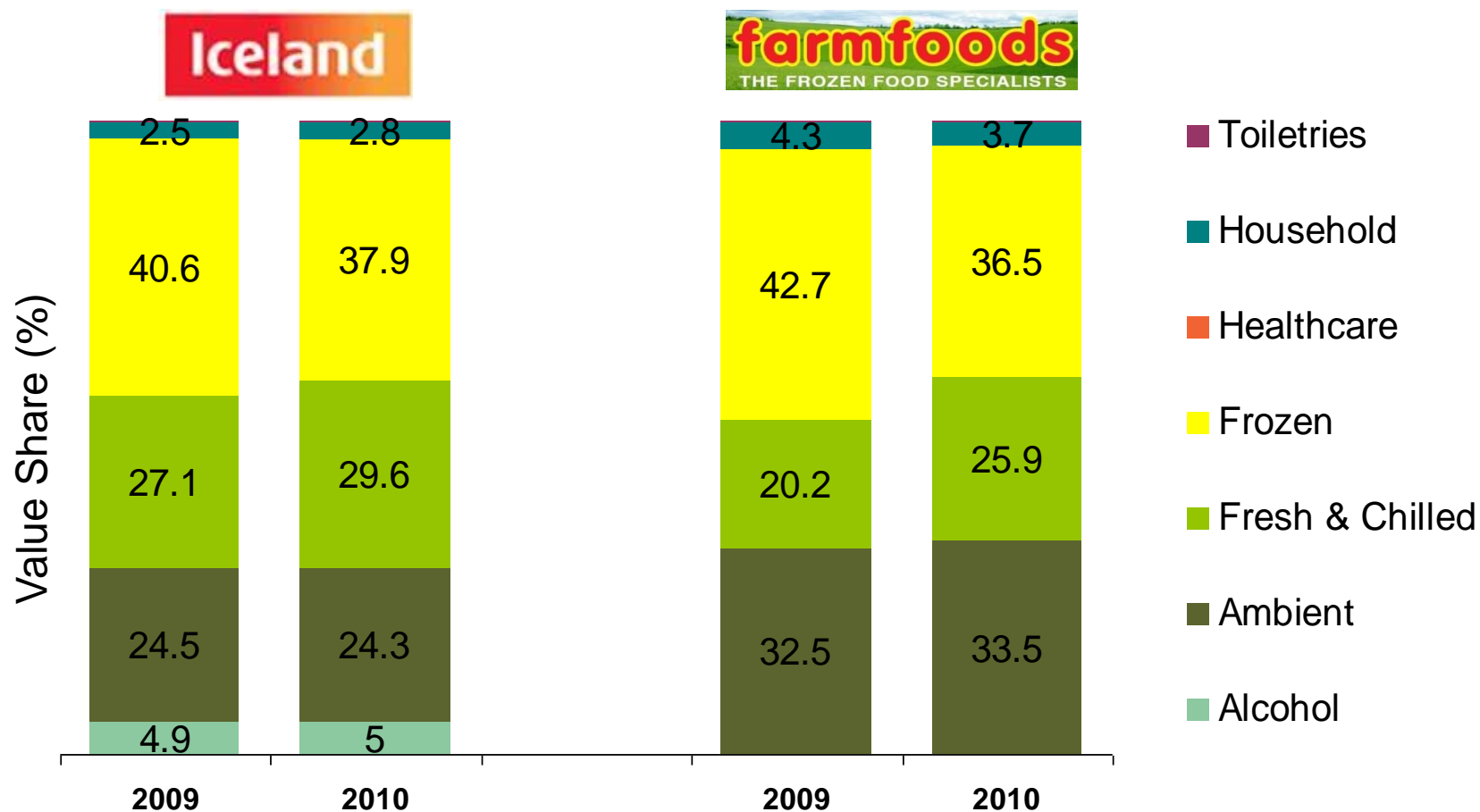
Iceland Share of Till Roll Grocers



ICELAND AND FARM FOODS – SHARE BY SECTOR

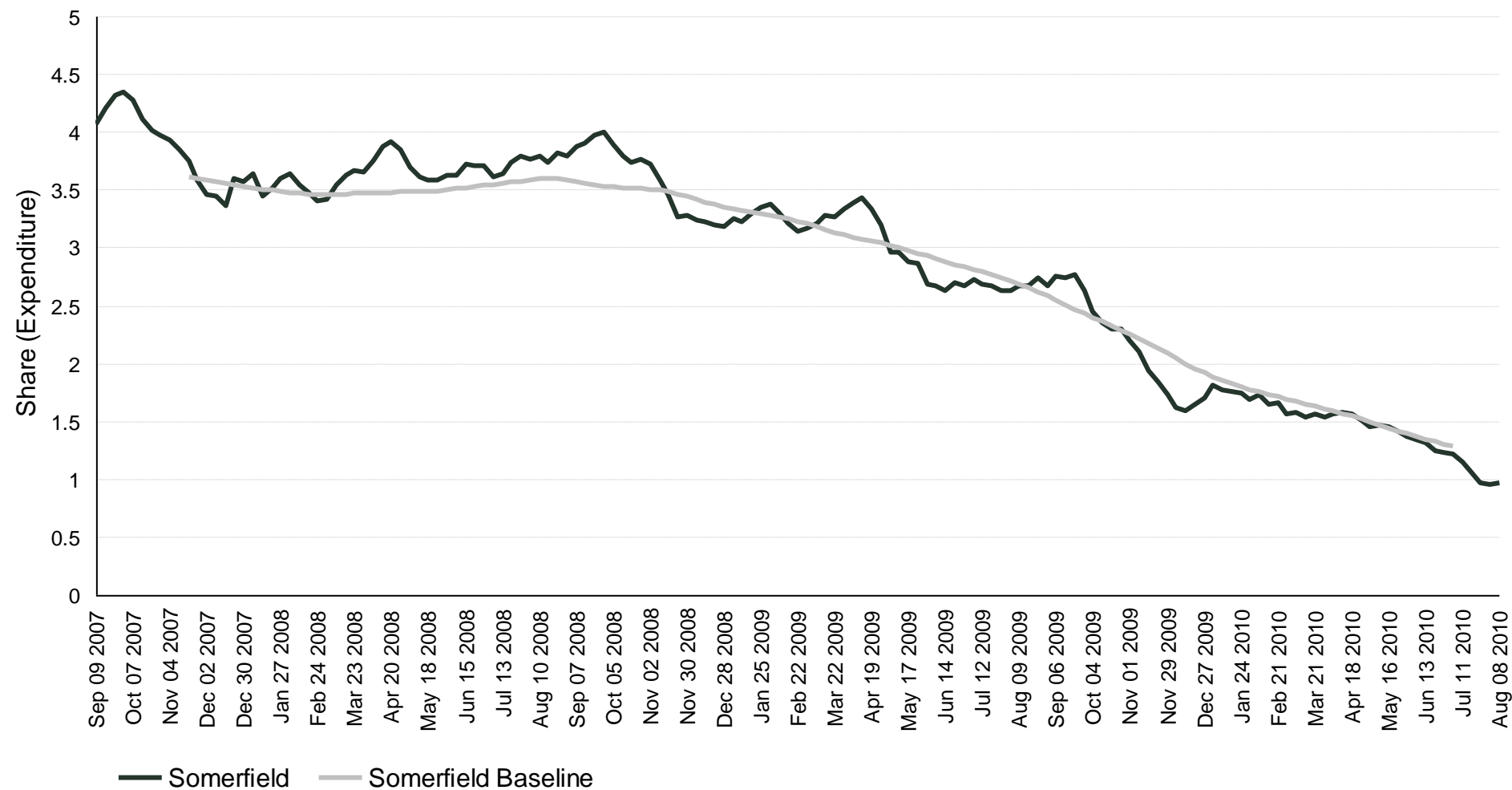
Fresh & Chilled gaining share from Frozen

Grocery Sector Value Share

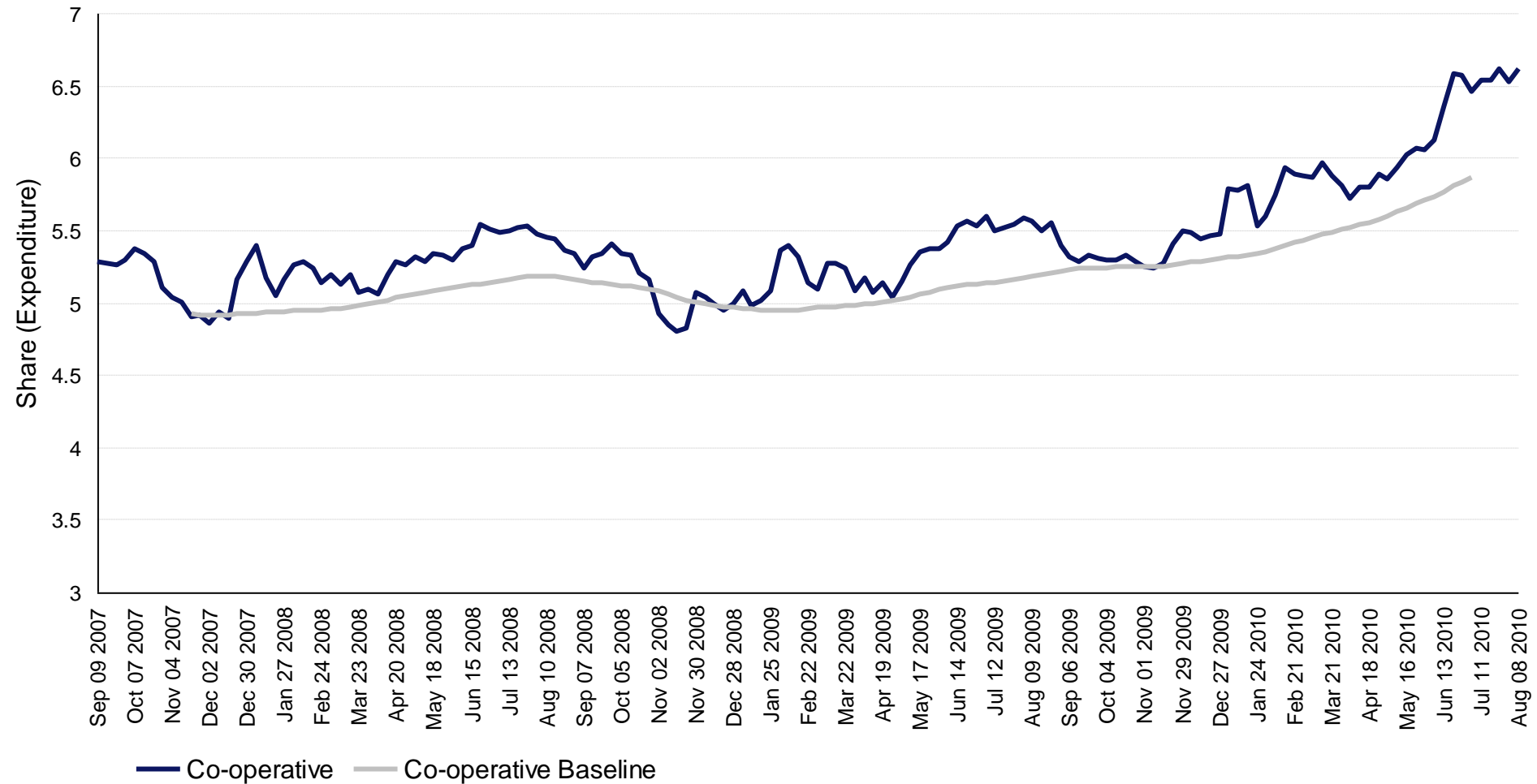


Kantar Worldpanel Total Grocery – 12 w/e to 08 Aug 2010 vs 09 Aug 2009

Somerfield Share of Till Roll Grocers



Co-operative Share of Till Roll Grocers

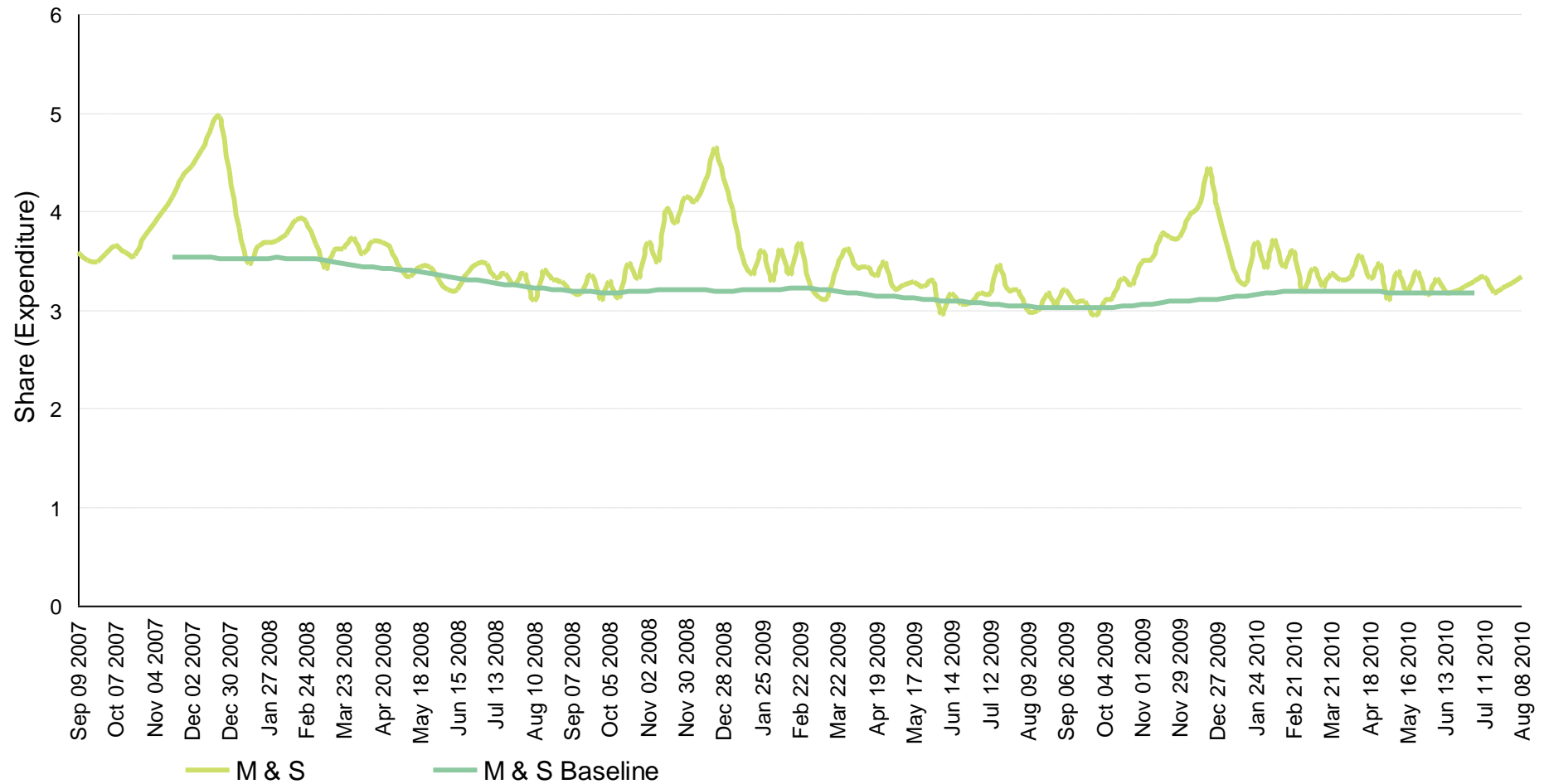


The Agenda

- A sense of proportion returns
- Tesco – Never complacent
- Asda – Price and/or Quality
- Sainsbury's – Striking a Balance
- Morrisons – 'Fresh for less'
- Waitrose – Ethical extremism
- Discounters – Threat postponed
- > – M&S – Always the Bridesmaid
- Home Delivery



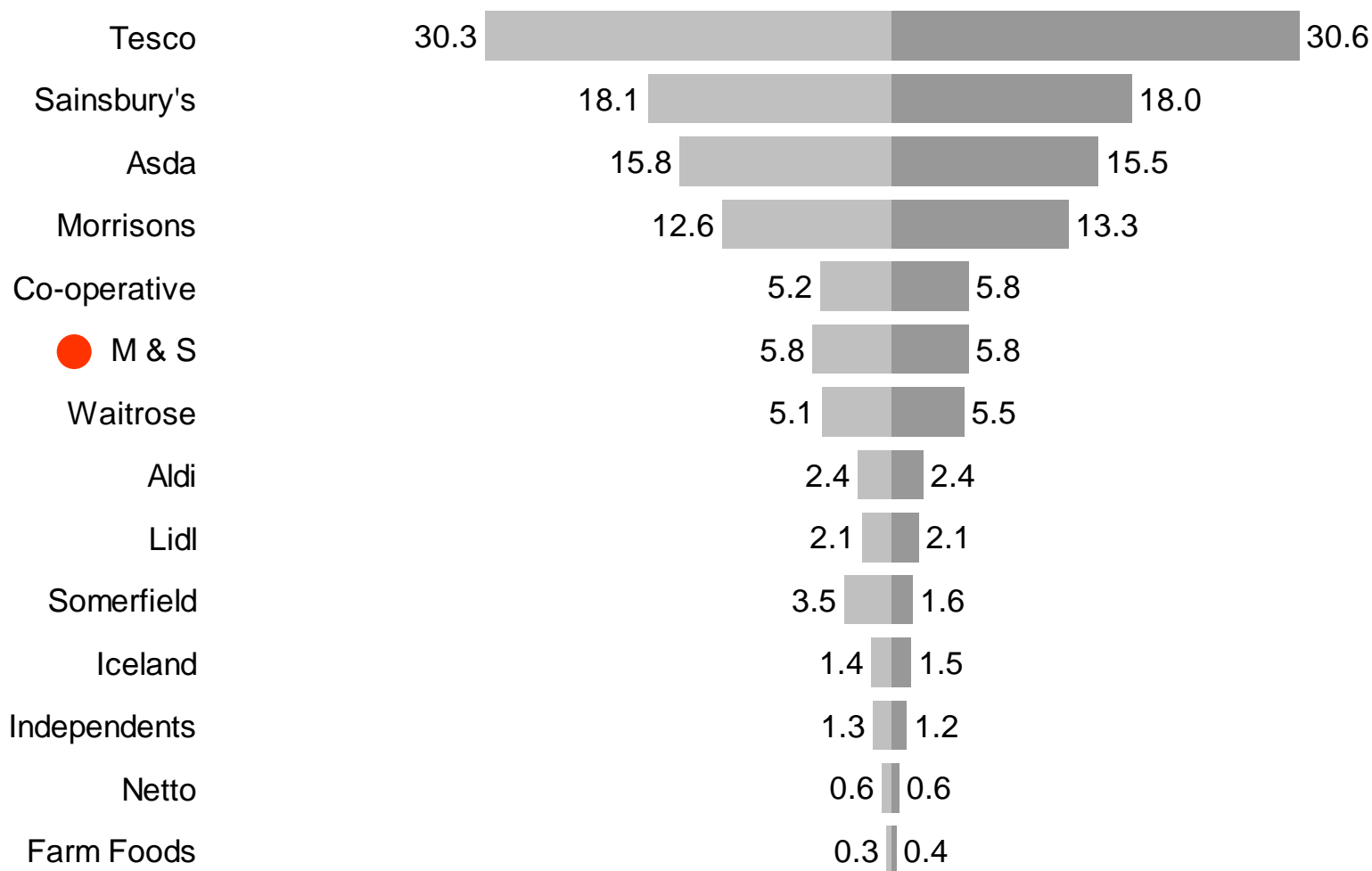
M&S Share of Retailer ShareTrack Grocers



Weekly 3 Point Centred Moving Average

Share of Total Grocers -

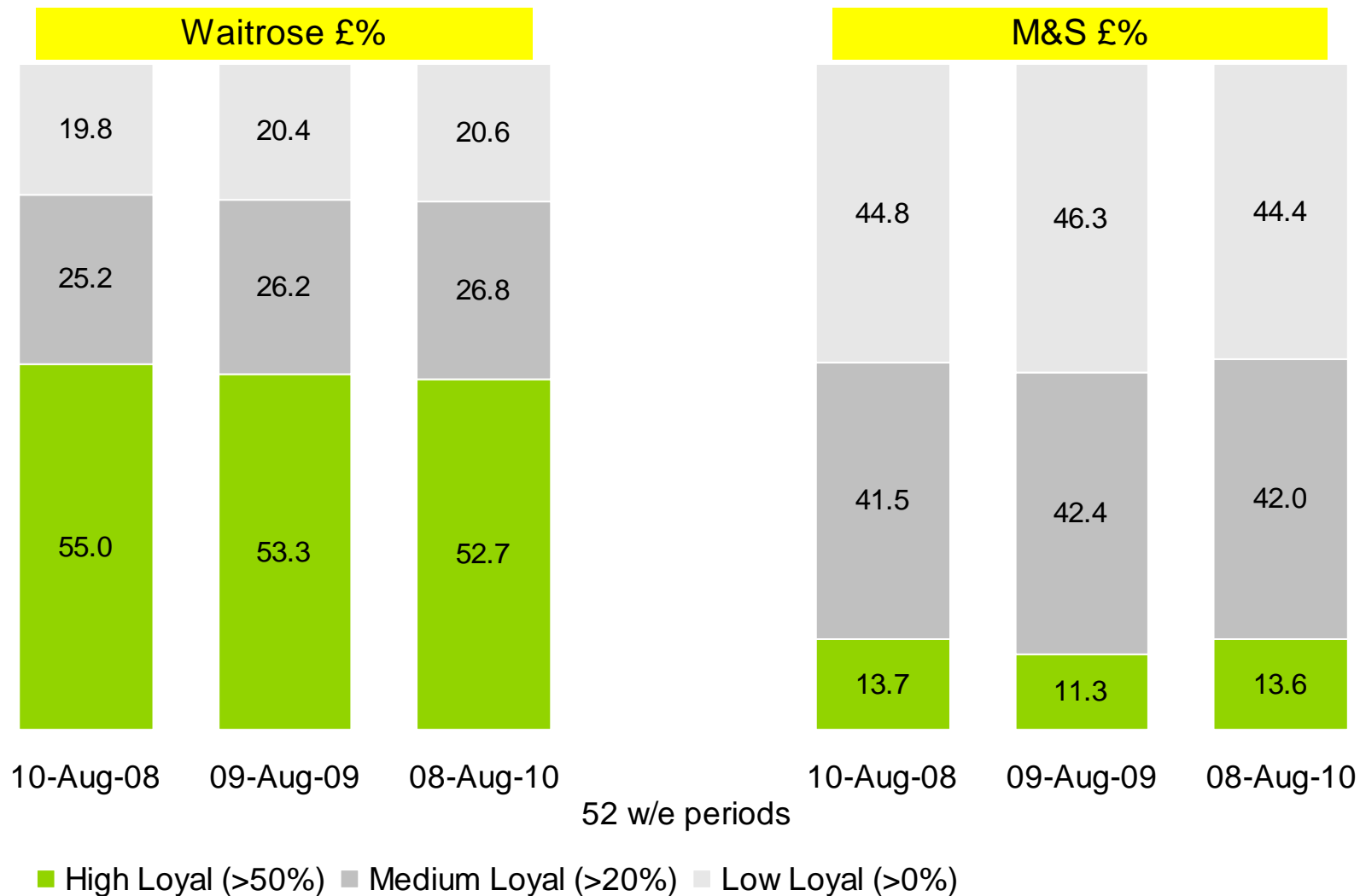
Fresh+Chilled



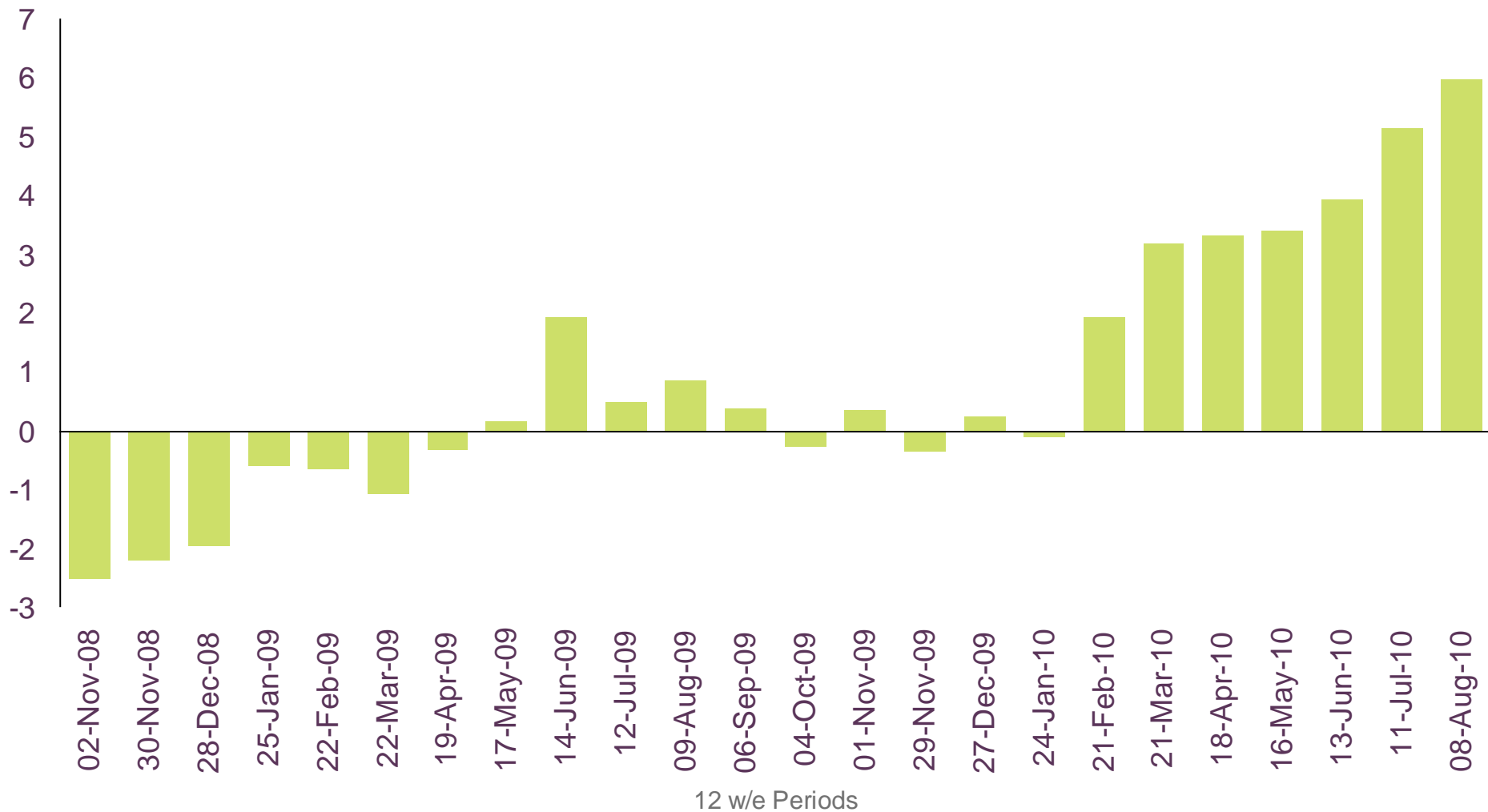
52 w/e 09 Aug 09

52 w/e 08 Aug 10

Trended Loyalty Breakdown



M&S Year-on-Year Growth Trends - RST £%



The Agenda

- A sense of proportion returns
- Tesco – Never complacent
- Asda – Price and/or Quality
- Sainsbury's – Striking a Balance
- Morrisons – 'Fresh for less'
- Waitrose – Ethical extremism
- Discounters – Threat postponed
- M&S – Always the Bridesmaid
- > – Home Delivery



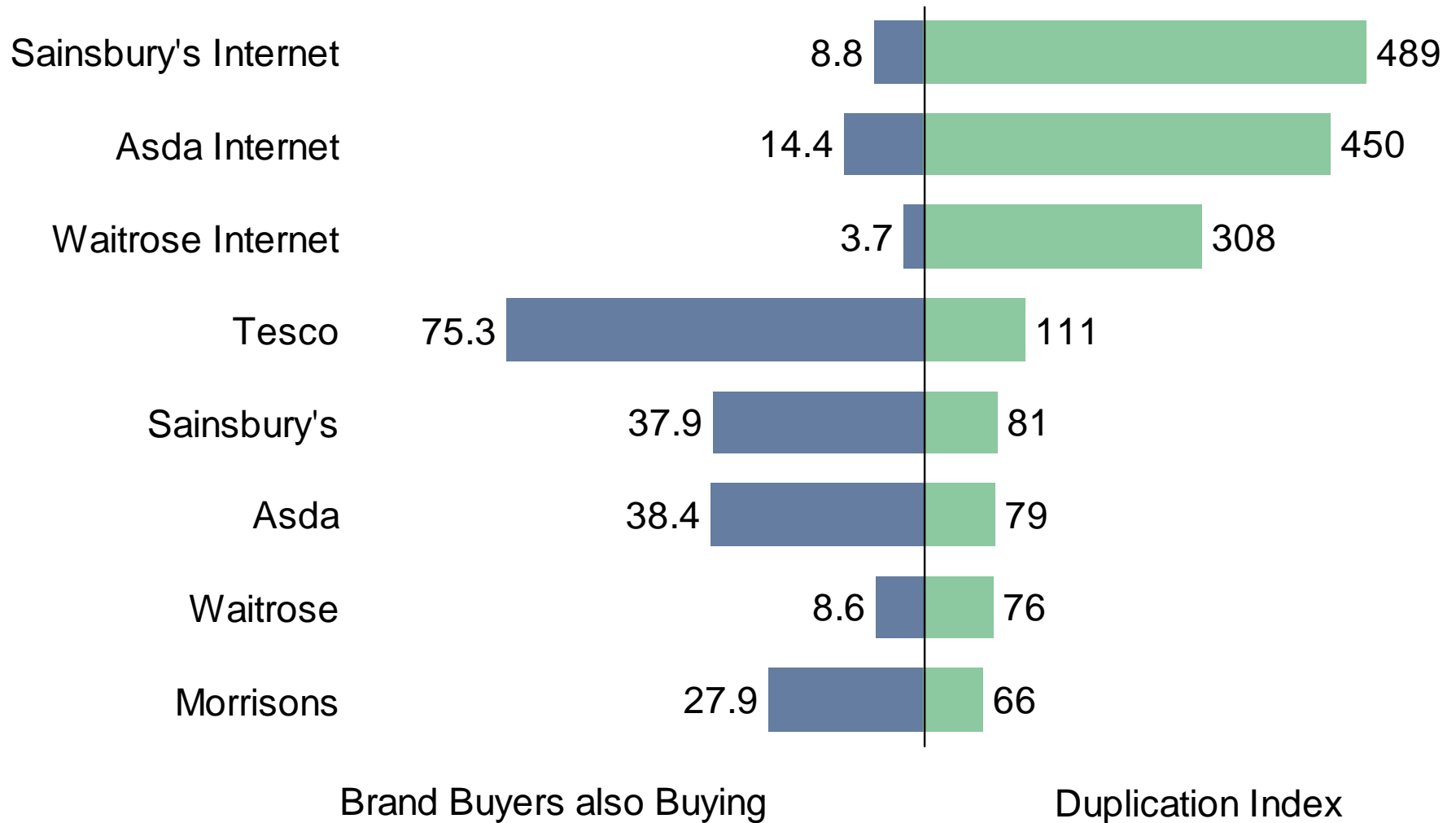
Total Internet Lifestage Signatures



Grocery Internet Household Income Signatures



Till Roll - Duplication by Tesco Internet Buyers

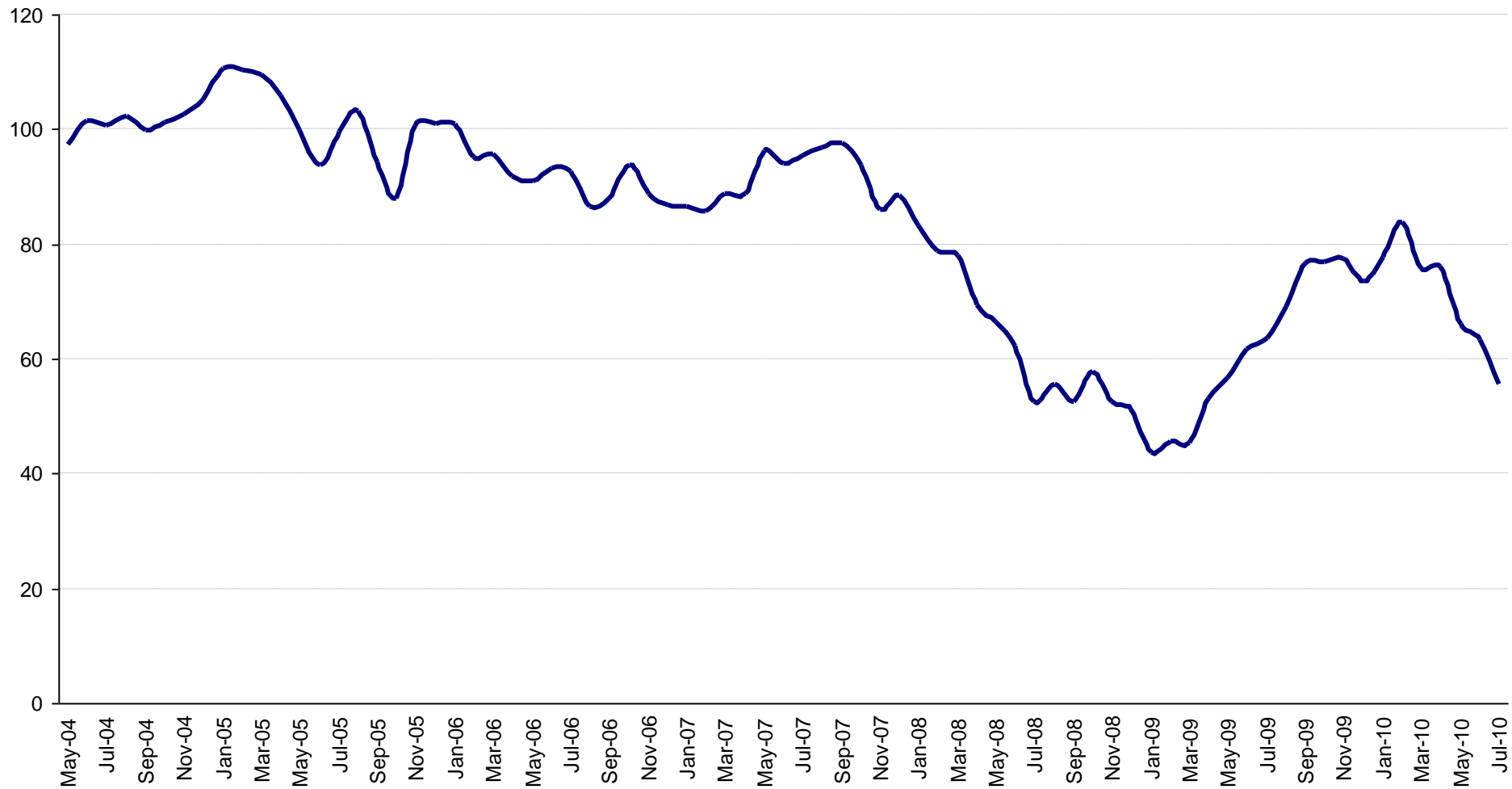


12 w/e Aug 08 2010

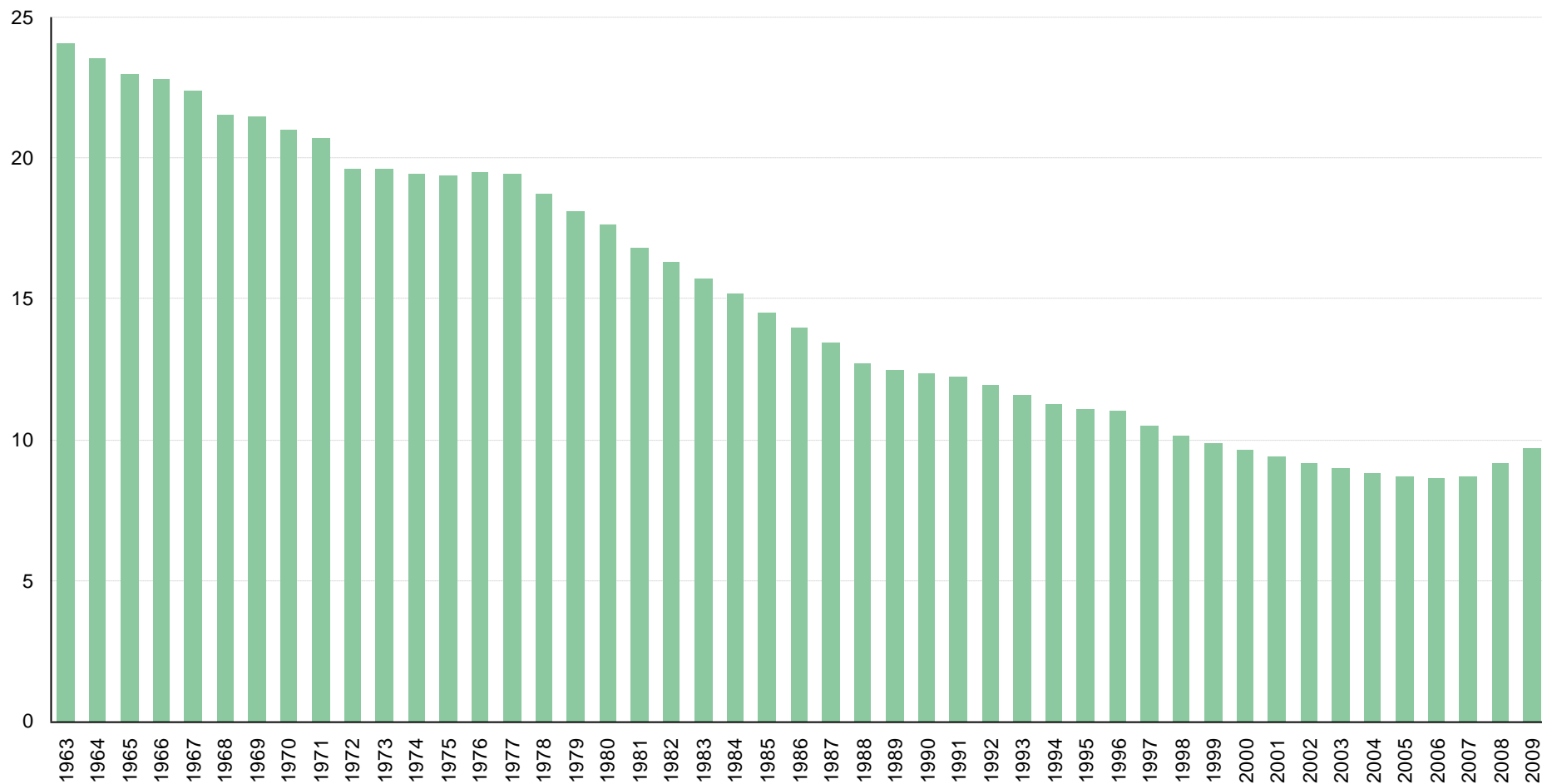
What does this tell us about the future?



Nationwide Consumer Confidence Index



Food and Drink as a Proportion of UK Household Expenditure %



Source: ONS Series ABQI / ABZV

KANTAR WORLD PANEL

edward.garner@kantarworldpanel.com
twitter edgarner