

# Marketing Society Excellence Awards 2017

**Brand Revitalisation: Serving Britain's  
shoppers a little better every day.**



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## EXECUTIVE SUMMARY

Sometimes, looking back can be the key to moving forward.

Following a series of well documented missteps over 2014/15, including the biggest loss ever suffered by a UK retailer, Tesco was experiencing a rather sobering reality: customers, colleagues and suppliers were finding it to be undifferentiated and untrustworthy. More Every Little Helps Tesco than Every Little Helps me.

Having undergone a period of introspection and 'brand archaeology', Tesco were able to define the behaviours behind its initial rise to greatness. It needed to get back to putting the customer first; back to being a workplace for colleagues to be proud of; back to being trusted by suppliers; back to *servicing* people, not just running shops.

The arrival of a new CEO, Dave Lewis in 2014, marked the beginning of this change. An ex-marketer, he understood the power of the business agenda and the brand strategy operating as one. Importantly, for Tesco, this would mean putting the customer at the heart of all business decisions, from the inside out.

To communicate this to Britain, Tesco needed to turn its 'Every Little Helps' brand line into a genuinely customer-centric proposition again, and live it, not just say it. In this way, all Tesco activity could be framed through the differentiator of 'helpfulness'.

Today, 'Every Little Helps' is making a big difference as Tesco starts to slowly win trust back from customers, colleagues and suppliers. Further, Tesco's revitalised brand has not only had a positive impact on the business's results; it's also been leading, helping and guiding the business agenda.

Put another way, this isn't just a story of 'brand revitalisation'. It's one of business revitalisation, through the brand.

This paper represents the beginning of a revitalised, more helpful Tesco.

(289 words)

## CONTEXT: THE FALL OF TESCO

Cast your mind back to 1997. Tesco, once the market's lacklustre number two, had become the UK's largest retailer, and one of our most trusted brands.

A decade later, the business and brand were entering a long period of decline, accelerated by two major corporate reputation crises in 2013 and 2014. However, these crises were mere symptoms of a more fundamental problem in the business, indicated by its tumbling share price (Figure 1).

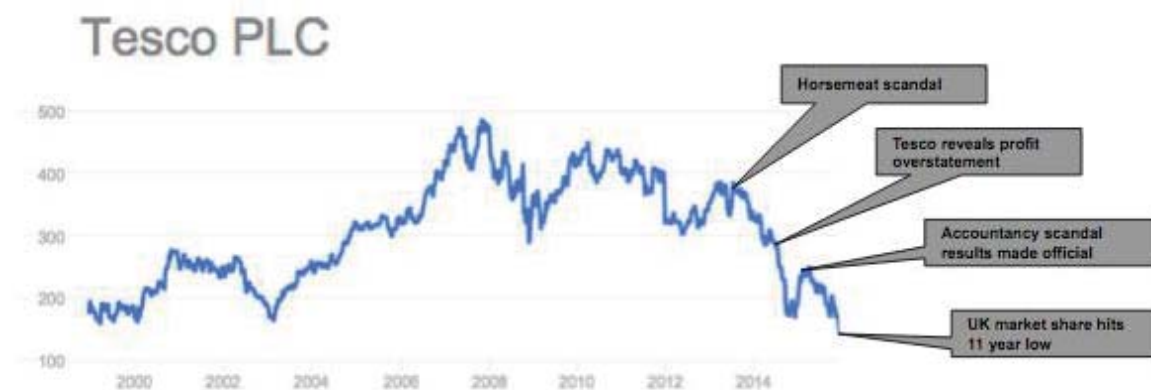


Figure 1: Tesco share price c1999-2015<sup>1</sup>

## CAUGHT IN THE UNDIFFERENTIATED 'MIDDLE'

Over the years, Tesco's customer-first mentality had been jettisoned in favour of expansion. Consequently, prices had crept up, and the business saw a decline in positive customer feedback measures<sup>2</sup>.

The grocery market was also fragmenting as consumers spread their budgets across a broader range of players<sup>3</sup>. This worked in favour of M&S and Waitrose, whose conveniently placed, smaller stores helped them secure enviable premium 'top-up' shops<sup>4</sup>.

Meanwhile, Tesco's value proposition was being attacked from all angles. Whilst Waitrose and M&S brought enhanced quality and service to the sector, Aldi and Lidl were creating a new dynamic, offering a simpler range of quality, fresh food at rock bottom prices.

Tesco had become the least differentiated player in the market. As customers traded up or down (Figure 2), it found itself marooned in an unappealing 'Middle' ground: undefined, yet everywhere.

<sup>1</sup> [Yahoo Finance](#); Tesco PLC share price, 1999-2015

<sup>2</sup> Blue Rubicon research, Dec 2014

<sup>3</sup> Kantar Worldpanel, total grocery market, main and top up shops penetration, 52 w/e 09 Nov 2014 and 08 Nov 2015

<sup>4</sup> Kantar Worldpanel 52w/e Grocery data to wk 28, 2015

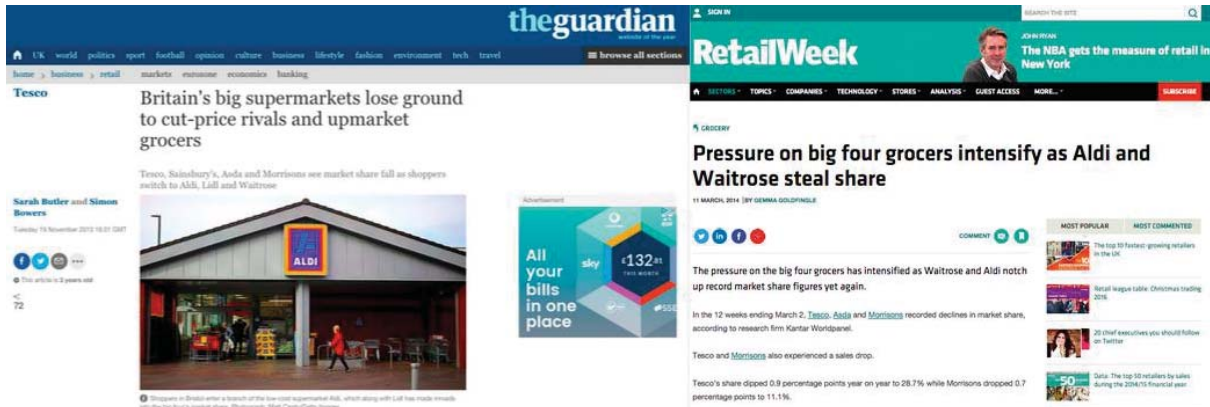
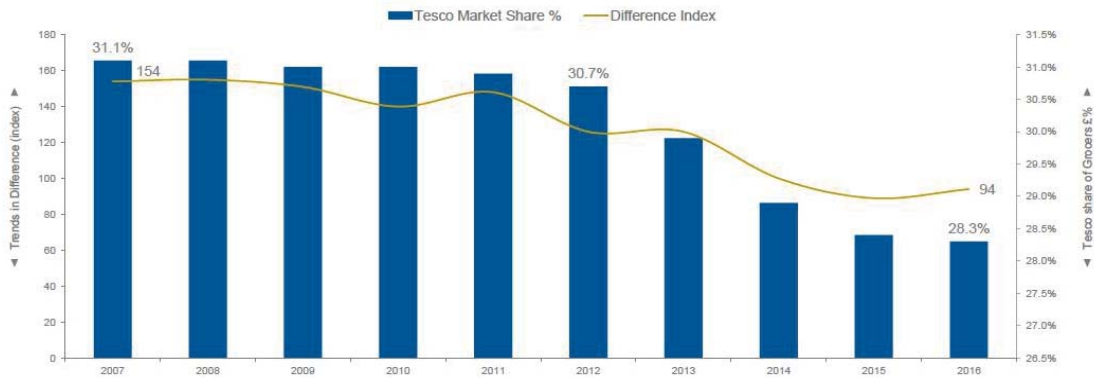


Figure 2: Tesco feels the squeeze as customers trade out and up or down<sup>5</sup>

This lack of brand differentiation was eroding Tesco's market share (Figure 3). Recognising this dynamic beyond the headline scandals would be critical in understanding how to move forward.

Tesco market share declines track the fall in brand differentiation

Brand equity propellers 2007 - 2016



KANTAR

Kantar Worldpanel Till Roll shares and Kantar Millward Brown difference index



9

Figure 3: The correlation between Tesco's lack of 'difference' and its falling market share<sup>6</sup>

LOSING THE NATION'S TRUST

Tesco's diminishing trust was largely driven by customers' daily disappointing experience with the brand – increasing prices, empty shelves, absent colleagues.<sup>7</sup>

'Choice' was promoted based on their ever-growing range, but it merely created a dizzying shopping environment, bloated with confusing deals (Figure 4).

<sup>5</sup> [The Guardian](#), Nov 2013, and [Retail Week](#), March 2014

<sup>6</sup> Kantar Worldpanel Till Roll shares and Kantar Millward Brown difference index

<sup>7</sup> Tesco Insights



Figure 4: Tesco's dizzying shopping environment<sup>8</sup>

Then two corporate reputation crises occurred:

In January 2013, Tesco's entire food offering was brought into question when the horsemeat scandal revealed a major breakdown in the traceability of the retail industry's food-supply chain.

And in April 2015, when the results of their 2014 accountancy scandal were made official, Tesco reported their worst results in history, and the biggest loss ever suffered by a UK retailer - a statutory pre-tax loss of £6.4bn for the year<sup>9</sup>

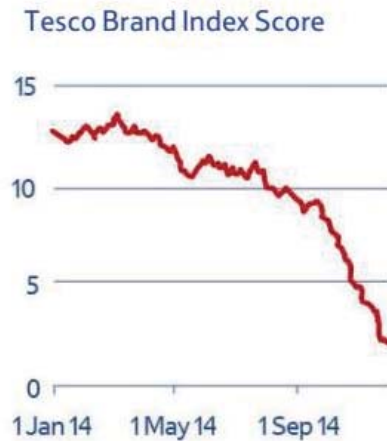
With its corporate struggles shifting from the business pages to the front page (Figure 5), Tesco's BrandIndex score, used as an overall measure for brand health and trust, plummeted to an all time low (Figure 6). From a customer viewpoint, Tesco had gone from being 'on my side' to being too big to care; from 'Every Little Helps' *me*, to 'Every Little Helps' *Tesco*.



Figure 5: Trust in Tesco diminished as their scandals filled the papers

<sup>8</sup> [This is money](#), 'The Tesco 'price war' starts and shoppers end up paying more!' Oct 2011

<sup>9</sup> Tesco PLC, Annual Report, 2015



Source: YouGov

Figure 6: Tesco's Brand Index score shows trust in the business plummeting to an all time low<sup>10</sup>

## CUSTOMERS WERE USING, NOT CHOOSING, TESCO

As Tesco drifted into an undefined middle ground and trust in the brand fell, so too did customer's desire to shop there. They couldn't ignore Tesco completely (it's far too convenient), it was just that when faced with a choice, customers weren't choosing Tesco.

As fewer customers visited and spent less when they did, Tesco's market share fell (Figure 7).

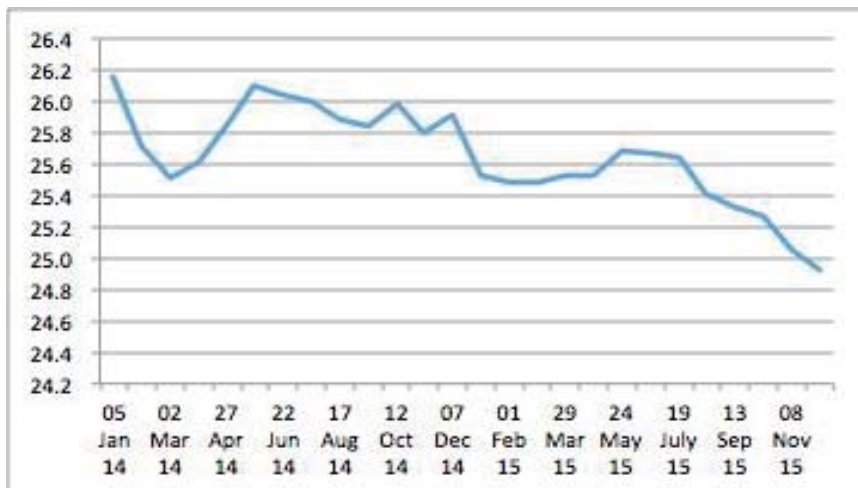


Figure 7: Tesco's falling market share was a result of fewer customers shopping and spending less<sup>11</sup>

<sup>10</sup> YouGov, Tesco BrandIndex Score

<sup>11</sup> Kantar Worldpanel, Tesco Total Grocery Market share growth, 12 w/e 5th Jan 2014 to 8th Nov 2015

## THE START OF CHANGE

Enter the new CEO, Dave Lewis:



When Dave Lewis started at Tesco in September 2014, a prominent figure in the industry described his task to him as “performing open heart surgery... in public”<sup>12</sup>.

Undeterred, Lewis recognised the need for “brand cardiology”<sup>13</sup>, and swiftly established a new marketing and agency team. His mantra: treat brand and corporation as *one*.

Recognising that “you can’t advertise your way out a problem you behaved your way into”<sup>14</sup> the new team set about understanding the behaviours that had characterised the brand at its peak.

At its best, Tesco had been the customer champion - on your side, the only supermarket that addressed everyone’s holistic shopping needs. Between 1993 and 1995 Tesco had launched 114 helpful new initiatives for communications to highlight, such as introducing mother and baby changing facilities, Clubcard, and many more.

This is what Tesco needed to get back to. Back to being the customer champion; back to being a workplace for colleagues to be proud of; back to being trusted by suppliers; back to “*servicing people*”, not simply “*running shops*”<sup>15</sup>.

<sup>12</sup> Dave Lewis, Annual Lecture, Marketing Society ‘Inspiring Bolder Marketing Leadership’, Mar 2016

<sup>13</sup> Dave Lewis, Annual Lecture, Marketing Society ‘Inspiring Bolder Marketing Leadership’, Mar 2016

<sup>14</sup> Dave Lewis, Annual Lecture, Marketing Society ‘Inspiring Bolder Marketing Leadership’, Mar 2016

<sup>15</sup> Dave Lewis, Annual Lecture, Marketing Society ‘Inspiring Bolder Marketing Leadership’, Mar 2016

## GETTING TESCO BACK TO ITS BEST: A FIVE-POINT PLAN

### 1. Setting a new brand purpose



Figure 8: Tesco's new brand purpose

The new brand purpose (Figure 8) provided a reset for the whole organisation and was designed to re-engage pride amongst colleagues in putting customers first again. Critically, it was exactly the same narrative Dave Lewis delivered to Tesco's Shareholders: corporation and brand as one.

To ensure it remained true to this purpose, Tesco set the following brand objectives<sup>16</sup>:

1. Get customers to recommend us and come back time and again
2. Get colleagues to recommend us as a great place to work and shop
3. Build trusted partnerships with our suppliers

The plan was to use this purpose to differentiate the brand on the foundations of 'helpfulness', and to do this starting with the colleagues, working outwards (Figure 9).



Figure 9: Tesco's commitment to drive genuine change from the inside, out

<sup>16</sup> Tesco PLC, The Big 6 KPI's



## 2. Fixing the basics

*"Having been a marketer I come with very much a customer lens to any business as that's what I care most about...I will say let's do what's right for the customer and then let's deal with the consequences from that on finance and the cost because it's ultimately worth it."*

Dave Lewis, Tesco CEO

Figure 10: 'Serving Britain's shoppers' drove investment, with customer matters trumping cost concerns<sup>17</sup>

Tesco moved quickly, simplifying a complicated range, investing in price to offer more consistent value, rebuilding supplier relationships, improving customer services, and investing in colleague-first initiatives to build more pride back into the business (Figure 11).



Figure 11: Tesco taking steps to fix some basics within the business

## 3. Reviving 'Every Little Helps'

The 'Every Little Helps' brand line still felt like the right way to bring the brand's 'helpful' differentiator to life. It had already proven itself in driving awareness of key initiatives<sup>18</sup>, and in building a more positive impression of Tesco<sup>19</sup>. It was also memorable and could act as a skewer through any message, from value to community initiatives.

But it had lost its meaning. Years of trade advertising had made it synonymous with price. We needed to turn it into a genuinely customer-centric proposition again. And it needed to be something that Tesco lived, not just said.

## 4. Delivering 'Every Little Helps' with a new, 'Helpful' approach to media

A new media strategy was crafted, designed to mirror Tesco's ambition to affect change from the inside out (Figure 12).

<sup>17</sup> Dave Lewis to [Marketing Week](#), 'Tesco boss says being a marketer gives him an 'edge'', 2016

<sup>18</sup> MRSL interviews with 450 nationally representative supermarket shoppers (i.e. not just existing Tesco shoppers) in November 1994 and March 1995, respectively.

<sup>19</sup> DRSM Qualitative Research, 1996



Figure 12: Mediacom's 5 media principles for Tesco<sup>20</sup>

The strategy encouraged focussing on Tesco's colleagues, stores and owned channels first, with an emphasis on putting customers at the heart of channel choices. This meant driving relevance through localisation and personalisation, together with a true understanding of modern Britain in all its diversity. It also required a radical shift in the media mix from print to digital to better reflect customer behaviour (Figure 13).

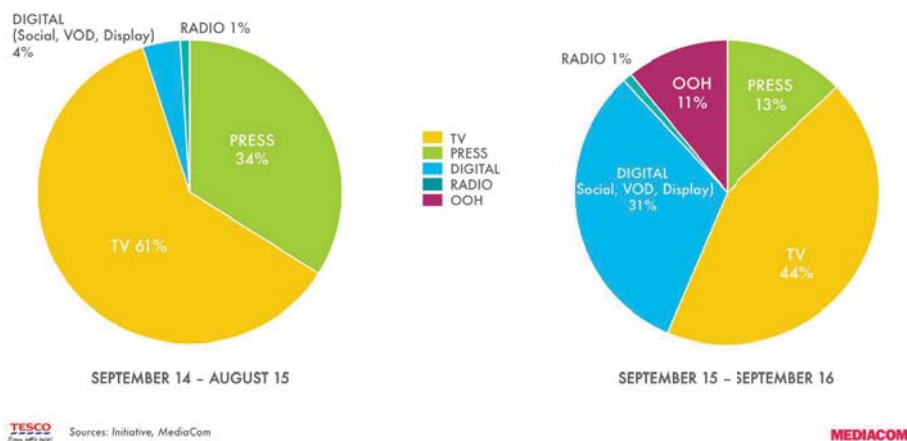


Figure 13: Tesco shifts its investment from print to digital for a more personalised approach<sup>21</sup>

## 5. Delivering 'Every Little Helps' with a new, 'Helpful' communications model

Having lacked differentiation for so long, Tesco now had a clear differentiator in 'helpfulness'. We made this the foundation of a new communications model, which focused on helping customers in four key areas (Figure 14).

<sup>20</sup> Initiative, Mediacom

<sup>21</sup> Initiative, Mediacom



Figure 14: Tesco Communications Model

Each of these areas required a specific job for communications:

### 5a. 'Helpful Shopping'

Having disappointed shoppers for so long, Tesco needed to show customers that they understood and could help them with their day-to-day shopping challenges<sup>22</sup>.

And so the 'Helpful Shoppers' were born (Figure 15). In contrast to previous and competitor campaigns, the star-studded cast helped the brand feel populist - injecting warmth, sincerity and insightful humour back into Tesco.



Figure 15: Tesco's 'Helpful Shoppers'

Whilst it may not have elicited a universally positive response from the creative world, the vehicle has worked harder than any to become category leading, delivering both better memorability and brand attribution than the work of every other UK supermarket (Figure 16).

<sup>22</sup> Tesco Insights

Looking at ad memorability and brand attribution, our ads lagged the market before The Tesco Shoppers were introduced



The Tesco Shoppers TV, however, has seen both metrics rise, and we are now ahead of the market

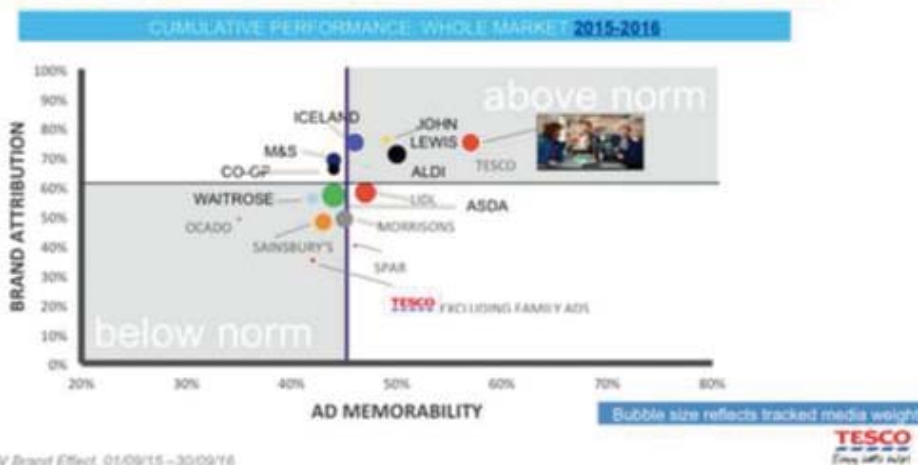


Figure 16: Tesco's ad memorability and brand attribution before and after the introduction of the 'Helpful' Shoppers,<sup>23</sup>

Tesco's Helpful Shoppers vehicle has flexed to communicate a wide range of helpful shopping initiatives, in a highly recognisable way (Figures 17 to 21).

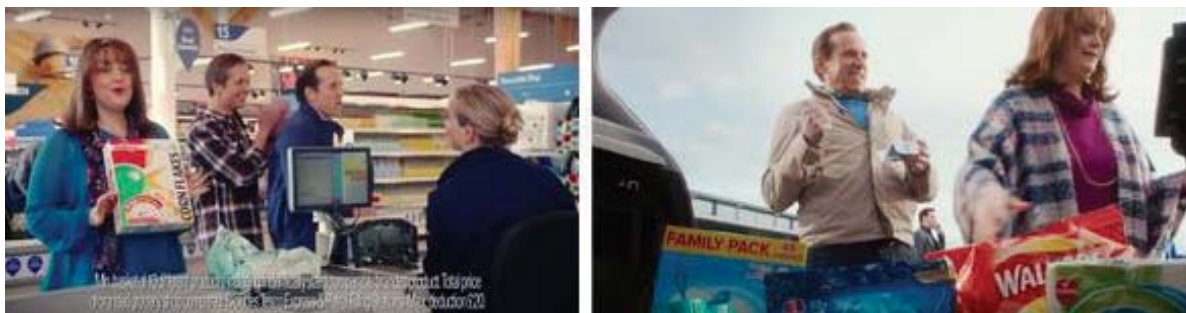


Figure 17: Helping to reassure customers that they're getting the best price, with the Tesco Brand Guarantee.

<sup>23</sup> Nielsen TV Brand Effect, 04/09/14 - 30/09/16



Figure 18: Helping customers to get more from their shopping with Tesco Clubcard.

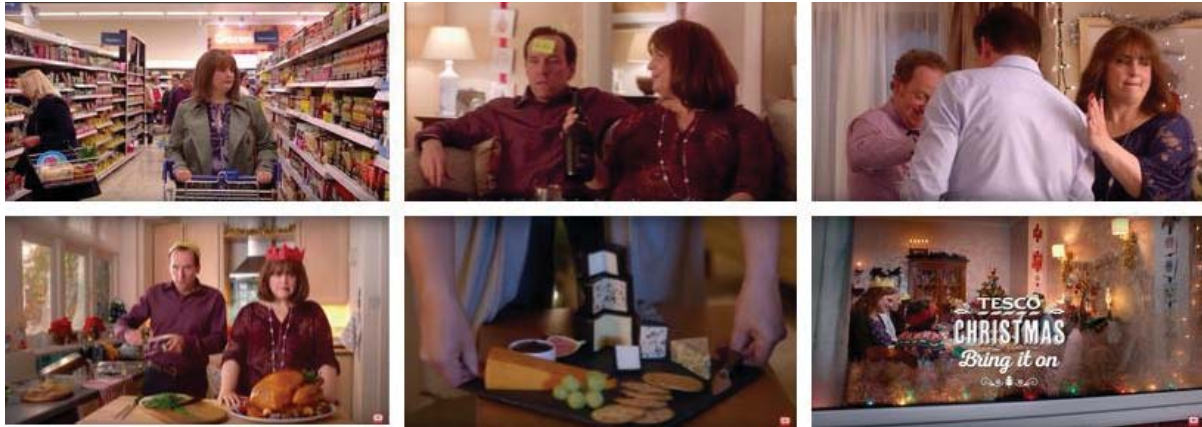


Figure 19: Helping hosts to feel confident they'll give their guests a wonderful Christmas.



Figure 20: Helping customers to save time in-store with a simple 'Scan as you shop' service



Figure 21: Helping customers to stock up for when they get home with Tesco's Same Day Click + Collect Service.

## 5b. 'Helpful Conversion'

By always starting with the customers, Tesco has established a genuinely *helpful* approach to conversion. Using customer insight, we uncover what matters to people in cultural events throughout the year – shifting our trading approach from the hard sell to the helpful sell (Figures 22 to 25). Plus, a focus on branded content has allowed us to deliver hyper-targeted 'helps' to relevant audiences.

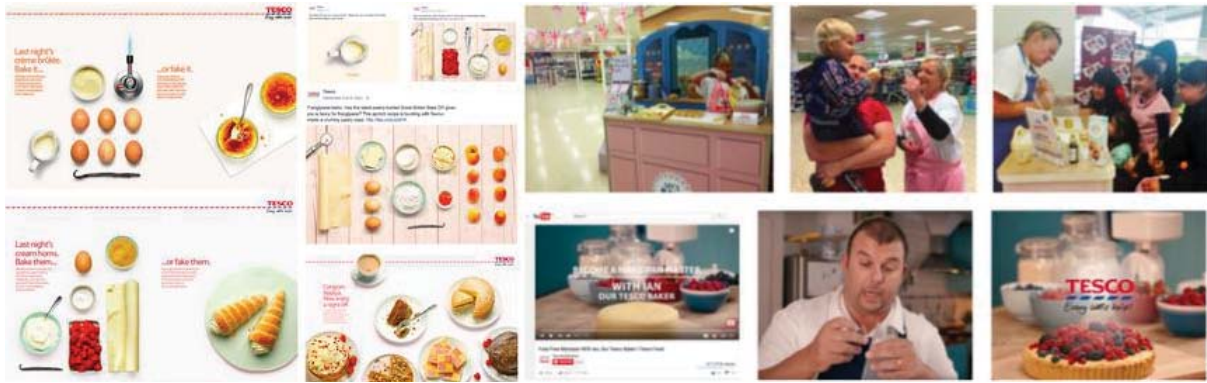


Figure 22: Helping budding bakers whose enthusiasm often outweighed their ability during the Great British Bake Off.



Figure 23: Helping parents, under pressure to find their child the perfect Christmas toy, with Tesco's Toy Testers.



Figure 24: Helping Britain's dads hear the appreciation they deserve but don't always receive on Father's Day.



Figure 25: Helping families create their most spooky Halloween ever.

### 5c. 'Helpful Citizenship'

*"If you were to look just at our TV advertising and not to spend time looking at all the other ways we've engaged with customers, particularly over the last 12 to 18 months, then you might miss some of the totality of the marketing mix."*

Dave Lewis, Tesco CEO

Figure 26: Dave Lewis to Marketing Week<sup>24</sup>

With a store in nearly every town, it was vital for Tesco to make a positive difference in the communities it served (Figures 27 to 31).



Figure 27: Helping reduce food waste with Tesco's Community Food Connection.<sup>25</sup>



Figure 28: Helping support the development of open spaces local to stores by turning the Government's 5p carrier bag levy into local grants with Tesco's 'Bags of Help' initiative



Figure 29: Helping over a million children develop a healthier relationship with food with Tesco's 'Eat Happy' Project<sup>26</sup>



Figure 30: Helping support Lesbian, Gay, Bisexual & Transgender colleagues via 'Out at Tesco', an internal network

<sup>24</sup> [Marketing Week](#), Oct 2016, 'Tesco admits TV ads 'could still improve''

<sup>25</sup> [Tesco.com](#), Community Food Connection

<sup>26</sup> [Tesco PLC news release](#), 'The Eat Happy Project reaches one million children', Nov 2015

## Every pint helps

Guaranteed fair pay for farmers

Guaranteed 100% British milk

Guaranteed care for every cow



To find out more, visit [tesco.com/milk](http://tesco.com/milk)



Figure 31: Helping Britain's dairy farmers get a fair price for every pint of milk, with the Fair for Farmers Guarantee

Tesco have also helped customers live more healthily through initiatives like sweet-free checkouts; expanding their *Free From* range, and by turning 'Free fruit for kids' (originally a colleague initiative) into a national scheme.

### 5d. 'Helpful Food':

Food quality represented a critical area of focus for Tesco who had the lowest quality image of the pack (Figure 32).

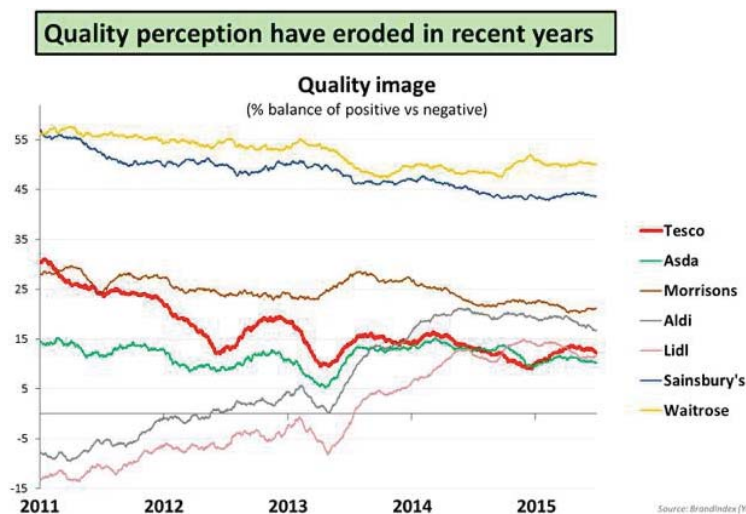


Figure 32: At the end of 2014, Tesco had the lowest quality image of all supermarkets in the UK<sup>27</sup>

The issue was one of brand perception (Figure 33).

<sup>27</sup> Quality Image over time for UK's supermarkets, Brandindex, YouGov, 2015



**Sainsbury's own-label products are rated as tasting better than Tesco's...but Sainsbury's lead vanishes when we remove brand effect**



Figure 33: Tesco beats Sainsbury's in a blind taste test, however, introducing the Tesco brand has a negative effect<sup>28</sup>.

To close this perception gap, Tesco needed to tell its quality food story. Always with our helpfulness brand lens, the challenge was to understand and deliver what made food 'helpful' for shoppers today.

Data told us that customers first rely on friends, family, and peers for recipe inspiration before seeking out celebrity chefs or online experts<sup>29</sup>. And an online community panel revealed that people's much-loved recipes had a personal story attached to them<sup>30</sup>. Food wasn't just fuel, it was about love and relationships.

We needed to show that Tesco not only understood but also enabled this love of food. So this January, and currently live, we launched 'Food Love Stories, brought to you by Tesco' (Figure 34). (At time of writing Tesco have seen a 6,756% increase in sales of Guajarati curry paste after just one story!<sup>31</sup>)



Figure 34: 'Food Love Stories' - an integrated campaign that inspires people with personal stories around the meals we know they love, and helpfully bundles them in stores across the nation.

<sup>28</sup> Tesco Insights: Marketing Sciences, 450+ consumer interviews, 10 product categories (2015)

<sup>29</sup> Lightspeed GMI/ Mintel, Mintel Report, 'Attitudes towards cooking in the home', UK, May 2016

<sup>30</sup> C Space, various panels, 2016

<sup>31</sup> Tesco sales data, w/e 19th Jan, 2016.

## THE RESULTS: 'EVERY LITTLE HELPS' IS ONCE AGAIN MAKING A BIG DIFFERENCE

*"We have made further strong progress in the first half, with positive like-for-like sales growth across all parts of the Group as we re-invest in our customer offer whilst rebuilding profitability in a sustainable way. The entire Tesco team is focused on serving shoppers a little better every day."*

Dave Lewis, Tesco CEO

Figure 35: Dave Lewis in Tesco PLC's news release on the interim results<sup>32</sup>

Every little helps is making a big difference. The brand that was once 'too big to care' is now back on the customer's side, revitalised, driven by a clear sense of purpose. And it's paying off commercially.

The dial has moved on each of our three brand objectives:

### 1. Get customers to recommend us and come back time and again

Tesco is the most improved retailer in the last 2 years in terms of customer recommendations,<sup>33</sup> with a strong, +13 improvement in NPS in 2016/17 versus 2014/15 (Figure 36).



Figure 36: Reflects % of Fans minus % of Critics recommending Tesco to friends or colleagues<sup>34</sup>

Customer's perceptions of Tesco's value and quality have improved dramatically (Figures 37 and 38).

<sup>32</sup> News release, Tesco PLC interim results 2016/17, 5th Oct 2016

<sup>33</sup> Tesco's periodic Customer Spotlight survey, Tesco PLC interim results 2016/17, Oct 2016

<sup>34</sup> Tesco's periodic Customer Spotlight survey, Tesco PLC interim results 2016/17, Oct 2016

## How Tesco has taken on the discounters

YouGov BrandIndex - Tesco Value score July 2015-July 2016

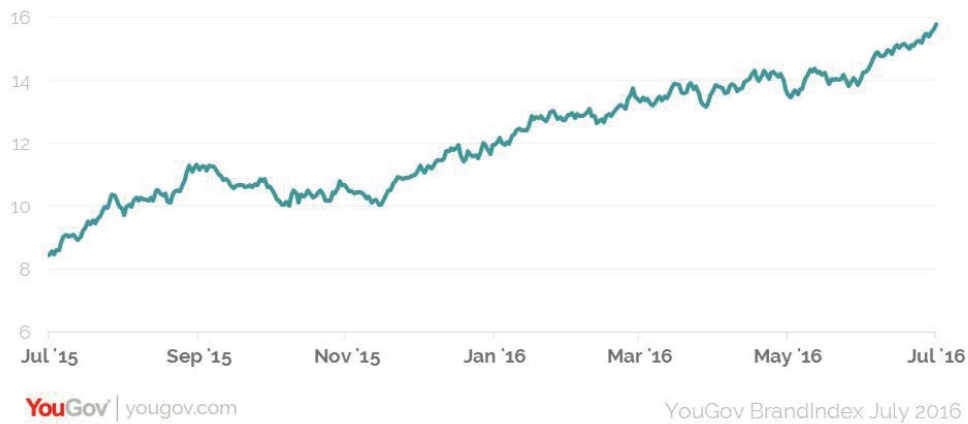


Figure 37: Tesco customer's belief that it offers 'value for money', up +7 points between July 2015 and June 2016<sup>35</sup>

## Consumer perception of Tesco quality has increased

YouGov BrandIndex - Tesco Quality score July 2015-July 2016

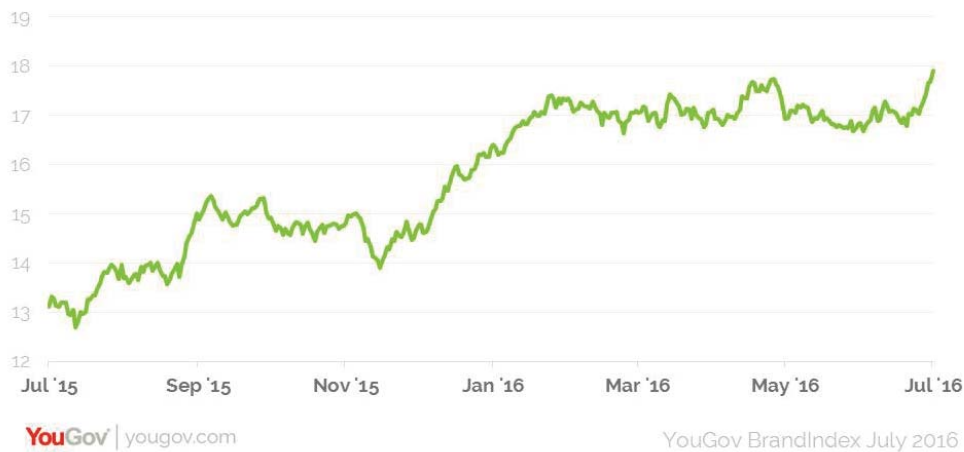


Figure 38: Tesco customer's perceptions of Tesco's quality, up +5 points between July 2015 and June 2016<sup>36</sup>

Tesco has attracted a further 228,000 shoppers through its doors since 2011<sup>37</sup>, and has encouraged them to come back (Figure 39), even switch to Tesco (Figure 40).

<sup>35</sup> YouGov Tesco Brand Index, Value for Money, July 2016

<sup>36</sup> YouGov TescoBrand Index, Quality, July 2016

<sup>37</sup> [Kantar World Panel](#), Tesco wins market share for the first time in 5 years', October 2016

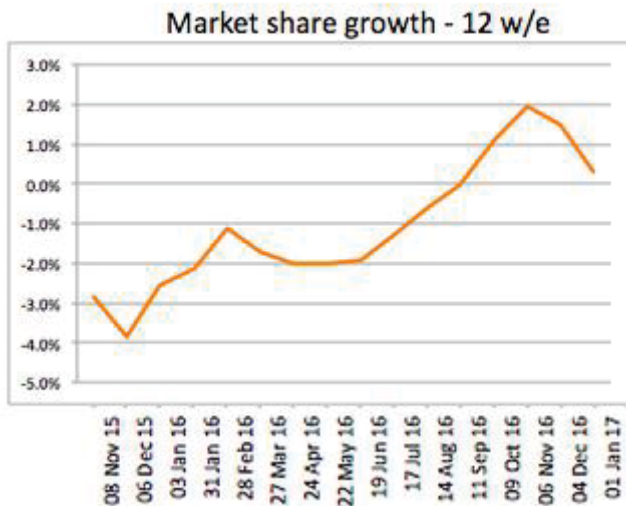
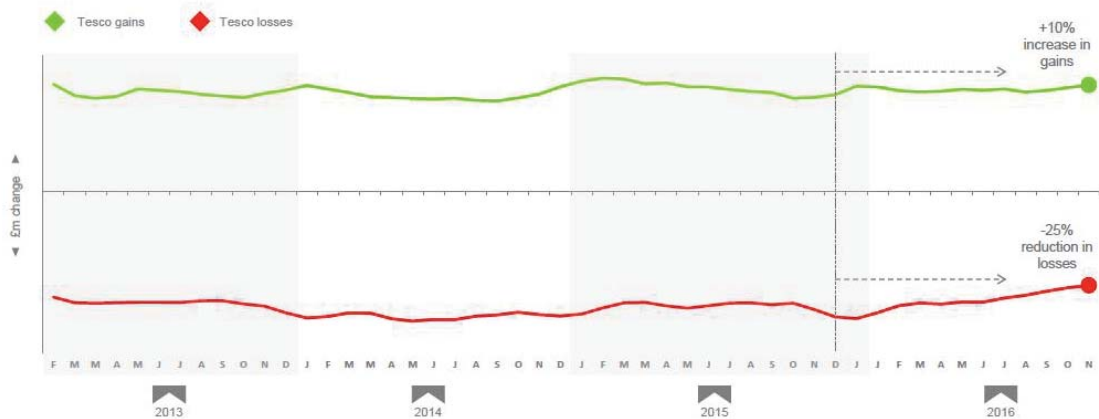


Figure 39: Tesco's rising market share as more customers were shopping and spending more<sup>38</sup>

Switching broken into total gains & total losses



KANTAR

Kantar Worldpanel Till Roll 2016 11. 12 w/e 06 Nov 16

TESCO 21

Figure 40: Tesco has seen less people switching out, with a 25% reduction in losses and +10% people switching in<sup>39</sup>

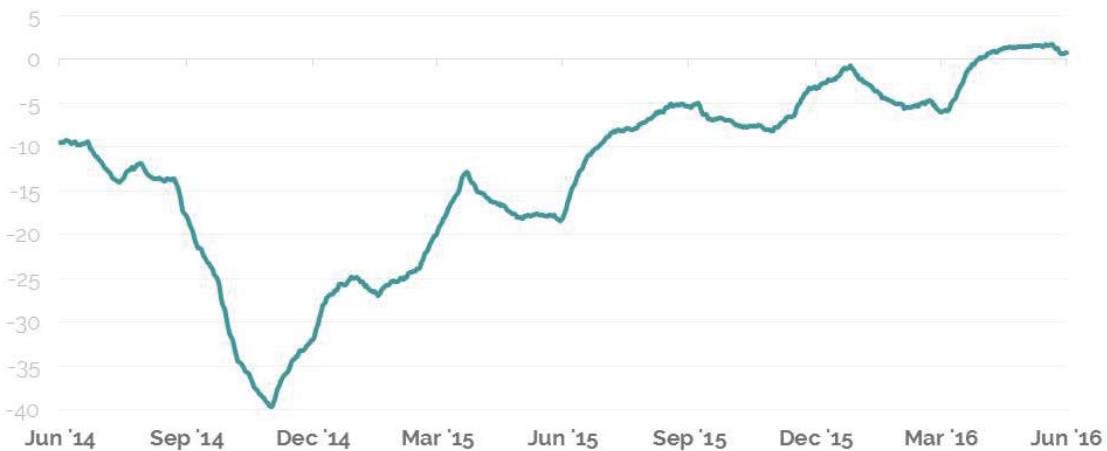
In 2016, Tesco was listed as the most improved brand in the BrandIndex Buzz Rankings as customer conversations surrounding the brand today became more positive (Figure 41).

<sup>38</sup> Kantar Tesco 12 w/e 08th Nov 2015 to 31st Dec 2016, Total Grocery Market share growth

<sup>39</sup> Kantar Worldpanel Till Roll 2016 11 12 w/e 06 Nov 16

## Tesco is BrandIndex Buzz score top improver

YouGov BrandIndex - Tesco : Buzz Score June 14 - June 16



YouGov | yougov.com

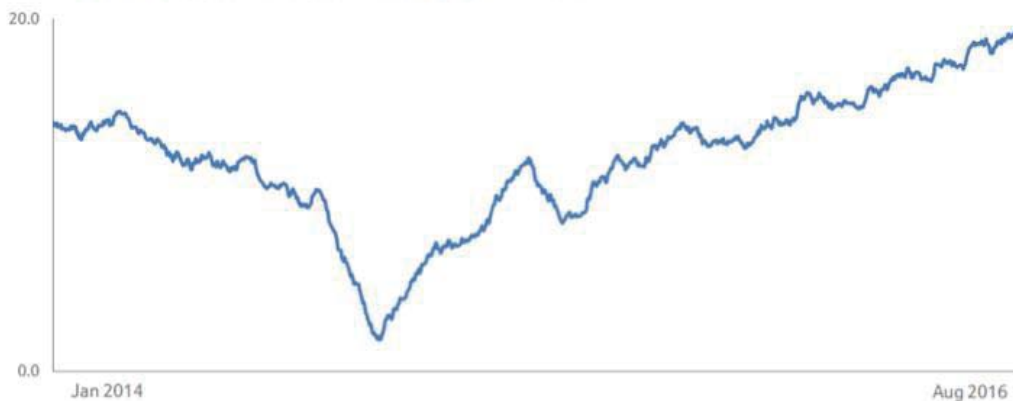
YouGov BrandIndex July 2016

Figure 41: Tesco's Buzz Score has improved by +17 points compared to the same point in 2015.<sup>40</sup>

And Tesco's BrandIndex is already sitting at its highest level in more than four years (Figure 42), reflecting the trust customers have in the revitalised Tesco they see today.

## Rebuilding trust and transparency

BrandIndex Index Score – an overall measure of brand health



Source: YouGov BrandIndex.

9

Figure 42: 'BrandIndex', an external measure of brand health and trust, now at highest level for more than four years<sup>41</sup>

While this is a great result, Tesco are determined that it's only the beginning.

## 2. Get colleagues to recommend us as a great place to work and shop

<sup>40</sup> YouGov Tesco BrandIndex, Buzz score, July 2016

<sup>41</sup> YouGov Tesco BrandIndex, Brand Health, Jan 2014 to Aug 2016

As Tesco's 320,000 colleagues have witnessed the business's improvements, they've become more enthusiastic in recommending Tesco as a place to work and shop (Figure 43).



Figure 43: % increase in Colleagues recommending Tesco<sup>42</sup>

### 3. Build trusted partnerships with our suppliers

There's a still lot more to be done, but Tesco is already seeing great progress in rebuilding trusted partnerships with their suppliers (Figures 44, 45 and 46).

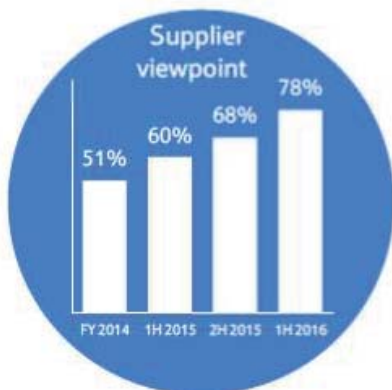


Figure 44: A strong improvement in Tesco's UK supplier satisfaction measures at 78% (up from 51% in 2014/15)<sup>43</sup>

<sup>42</sup> Reflects % of colleagues recommending Tesco as a great place to work as part of What Matters To You? survey undertaken every January and August.

<sup>43</sup> Reflects % of UK suppliers responding positively when asked "Overall how satisfied are you with your experience of working with Tesco?" as part of the Supplier Viewpoint survey undertaken in August 2016



Figure 45: % UK suppliers are responding positively YOY to the statement: *Tesco is simple, transparent and easy to deal with*<sup>44</sup>

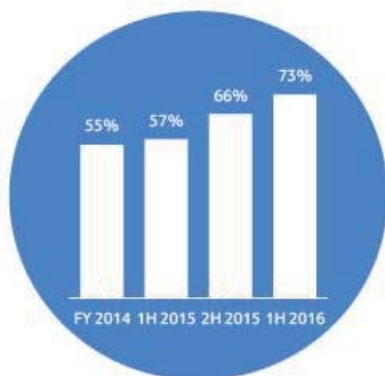


Figure 46: % UK suppliers are responding positively YOY to the statement: *Tesco treats me fairly*<sup>45</sup>

Tesco have even received third-party recognition from the Groceries Code Adjudicator (Figure 47):

*"...most retailers have improved their behaviour in the past year with **the highest performer identified as Tesco** – 65% of those supplying the retailer saying its practices had improved..."*

UK Groceries Code Adjudicator

Figure 47: Recognition from the Groceries Code Adjudicator regarding feedback they received from Tesco suppliers<sup>46</sup>

Treating corporation and brand as one is also paying off commercially:

After 3 years of decline, and having suffered the largest ever annual loss by a UK retailer, strong trading over Christmas 2016 helped Tesco achieve its eighth consecutive quarter of growth<sup>47</sup>

<sup>44</sup> Reflects % of UK suppliers responding positively to this statement as part of the Supplier Viewpoint survey undertaken in August 2016.

<sup>45</sup> Reflects % of UK suppliers responding positively to above statement as part of the Supplier Viewpoint survey undertaken in August 2016.

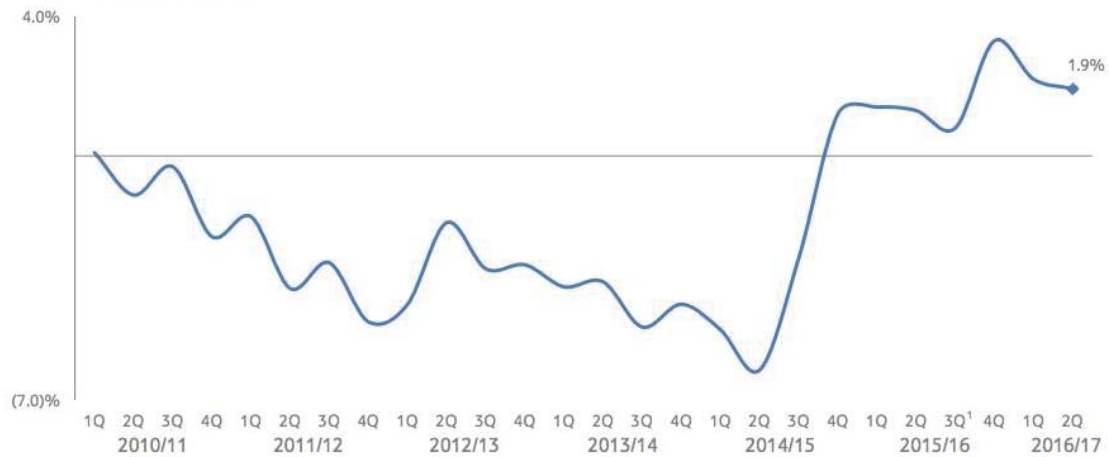
<sup>46</sup> Tesco PLC interim results 2016/17, 5th Oct 2016

<sup>47</sup> [International Business Times](#), 'Tesco racks up eighth consecutive quarter of growth as fresh food lifts Christmas sales', Jan 2017

UK like-for-like volume and transactions are up (Figures 48 and 49) and total revenue is up 1.4%<sup>48</sup>

## UK volume-based recovery

UK like-for-like volume



1. 3Q 2015/16 adjusted for the impact of non-repeated coupons in the prior year.

4

Figure 48: UK like-for-like volume is up 1.9%<sup>49</sup>

## UK transaction growth

Year-on-year change in UK transactions by quarter %

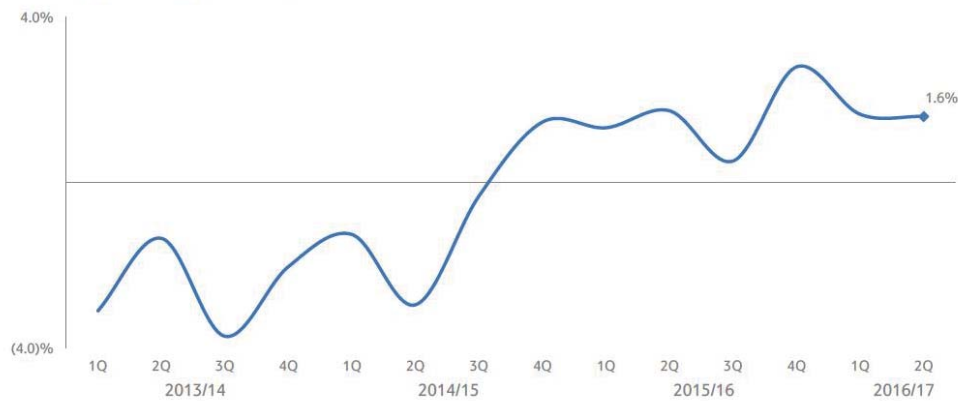


Figure 49: Transaction growth is up 1.6%<sup>50</sup>

And market share is up for the first time in five years (Figure 50):

<sup>48</sup> Tesco PLC interim results 2016/17, 5th Oct 2016

<sup>49</sup> Tesco PLC interim results 2016/17, 5th Oct 2016

<sup>50</sup> Tesco PLC interim results 2016/17, 5th Oct 2016



## KANTAR WORLD PANEL MARKET SHARE - TOTAL TILL ROLL

Includes all expenditure through main store tills and excludes petrol & instore concessions

Total Till Roll - GB Consumer Spend					
	12 Weeks to 11 October 2015		12 Weeks to 09 October 2016		% Change
	£millions	% **	£millions	% **	%
Total Grocers	24,538	100.0%	24,727	100.0%	0.8%
Total Multiples	24,031	97.9%	24,258	98.1%	0.9%
Tesco	6,886	28.1%	6,975	28.2%	1.3%
Sainsbury's	3,960	16.1%	3,946	16.0%	-0.4%
Asda	4,076	16.6%	3,864	15.6%	-5.2%
Morrisons	2,638	10.8%	2,560	10.4%	-3.0%
Co-op	1,567	6.4%	1,615	6.5%	3.1%
Aldi	1,379	5.6%	1,536	6.2%	11.4%
Waitrose	1,281	5.2%	1,326	5.4%	3.5%
Lidl	1,059	4.3%	1,148	4.6%	8.4%
Iceland	483	2.0%	517	2.1%	6.9%
Other Multiples	701	2.9%	773	3.1%	10.2%
Symbols & Independents	507	2.1%	469	1.9%	-7.4%

\*\* = Percentage Share of Total Grocers

**Figure 50: Tesco wins market share for first time in five years, whilst the others in the Big 4, see a loss<sup>51</sup>**

Marketing has been just one of many different factors driving these results. However, with brand purpose having influenced so many key business decisions, and econometrics revealing a combined short and long term ROI of ██████ for all of Tesco's marketing activity<sup>52</sup>, we're confident that marketing has absolutely played a role in helping to turnaround this cornerstone British business.

## CONCLUSION

By putting customers at the heart, Tesco's brand hasn't just positively impacted sales; it's become a guiding and galvanising force propelling the whole business forward. Consequently, this isn't just a story of brand revitalisation. It's a story of business revitalisation, through the brand.

Words: 1998

<sup>51</sup> [Retail Times](#), 'Tesco wins market share for first time in five years, latest Kantar Worldpanel data shows', October 2016

<sup>52</sup> Tesco econometrics data, Group M, profit based ROI, 2016: **ROI for judges' eyes only - not for publication**