



NIELSEN TOTAL TILL

4 WEEKS ENDING 5th October 2019

Retailer & Business Insights Team
14th October 2019

WHAT'S NEW IN THE LAST 4 WEEKS?

Sales growths slowed amid weakening demand and the return of changeable weather

- Total Till sales slowed to **+1.7%** and **shoppers spent less** at the Grocery Multiples than they did a year ago **-0.2%** (Scantrack).
- **Volume growth remains subdued** at **-0.6%** (Scantrack) for the full 4 week period and there has been no respite for 5 weeks putting further pressure on large store formats, as shopper spend continues to shift online and towards Discount supermarkets and High Street Value retailers.
- **Food inflation eased** to +1.1% in September from 1.6% in August (BRC Nielsen SPI) which is the lowest inflation rate since April 2018, due to seasonal reductions in fresh foods and with many retailers introducing 'big brand' price cuts to help regain momentum after a challenging summer.
- Better weather at the start of the trading period marked the 'end of Summer' and shoppers celebrated with seasonal food and drink. The inclement weather, however, soon returned and sales for the next 3 weeks at the Grocery Multiples turned negative.

WHAT'S NEW IN THE LAST 4 WEEKS?

Category Trends

- Across the super categories, **Soft drinks (sales +2.7%)** was the best performing category helped by the sunny weather in early September, followed by **Crisps and snacks (+2.3%)**. **Frozen Food** also performed better at **+2.1%**, helped by **+5% increase in Ice-cream** and **+14% for Ice Cubes**.
- In contrast and with a sharpening of pricing activity, the weakest sales were in Meat, Fish and Poultry where sales fell **3.5%**.
- **General Merchandise** sales fell further at **-4.7%** reflecting the underlying weakness in discretionary spend.
- The nations appetite for **Sustainability** continues alongside **Convenience** and **Health**, whilst the **weather entices shoppers to spend more on impulse items**. Highlights this month include: Re-usable Bags +126%, Umbrellas +83%, Fresh Meat Substitutes +37%, Water Bottles +34%, Adult Analgesics +22%, Pre-Mix Alcoholic Drinks +18%, Throatcare +12% and Frozen Pizza +7%.
- Spend on offer continues to increase to 27% this month, as retailers push Big Brand offers.

TESCO IS THE ONLY TOP4 SUPERMARKET IN GROWTH IN THE LAST 4 WEEKS

Retailer trends for the 4 weeks to 5th October 2019

- Against strong comparatives, **ASDA sales fell -1.8% due to a fall in spend per visit (-4.4%)**. This has been a trend over the last 12 months and may reflect a change in pricing and basket mix. Penetration is unchanged but frequency of visit is up suggesting an evolution in the shopping missions to the c. 570 Asda stores.
- Sales also slowed at Sainsbury's (-1.0%) and Morrison's (-1.5%) with both retailers having slightly less visits than last year. However Morrison's benefited from 200k more shoppers compared to this time last year.
- **Tesco** sales increased but only by **+0.9%** with no significant improvement in growth over the 12 weeks.
- **Iceland's** strong growth continues (**+4.2%**) and reflects the growing importance of the larger Food Warehouse format which is delivering new shoppers to Iceland this year and importantly, consistently bigger baskets, helped by a strong media campaign promoting authentic Italian food with vouchers offering a free meal and £5 off £20.
- **M&S (+1.4%) remains in growth** but falling penetration could be a concern. However increased frequency and a higher spend per visit is compensating for this - part of the new strategy to also target `bigger baskets`.

CO-OP MOMENTUM CONTINUES

Retailer trends for the 4 weeks to 5th October 2019

- **Co-op (sales +3.2%)** is attracting more shoppers than last year with 1 in 2 household's now shopping (annual penetration of 51%) which is ahead of M&S at 47% of households.
- At **Waitrose** growths are flat lining (**-0.8%**) and the increase in frequency (*second only to the Co-op*) suggests a different shopper behaviour with a shift towards `top up` shopping at Waitrose.
- **Aldi (sales +10%)** and **Lidl (+11%) continue to gain market share (15.8%)** but growths are lower than last year. This is despite the continuation of new store openings with c.25 new stores opened over the summer.

WHAT'S NEW IN THE LAST 4 WEEKS?

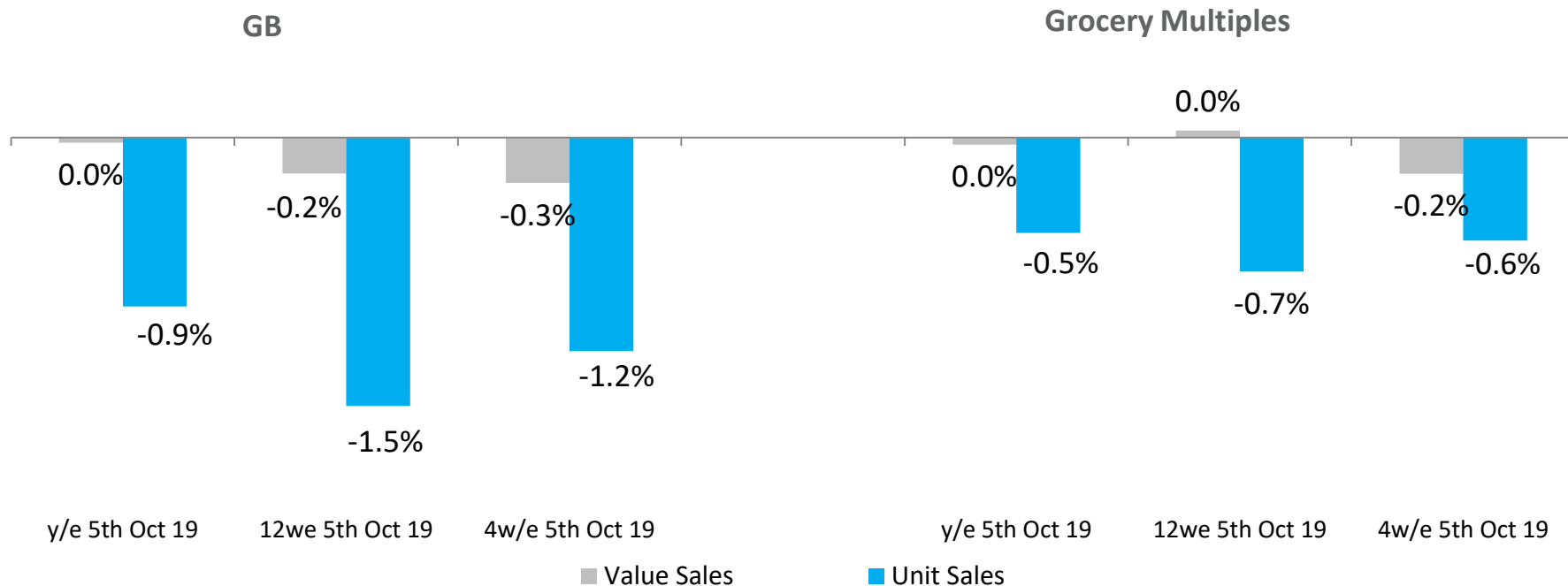
Advertising: TV, Press and Digital

Retailers this month targeted 'bigger basket spends', Big Brand promotions and Family.

- **Tesco** continues to celebrate their 100 years of 'great value' with Big Brand promotions.
- **Morrisons** are also pushing 'Big Brand Low Prices' and bigger baskets with a 5p off £40 fuel deal.
- **Aldi** continue to target bigger baskets with their 'kits for schools' campaign, as well as home furnishings, affordable plant based recipes and merchandise for Halloween.
- **Iceland** are targetting bigger baskets with £5 voucher off £20 and raising their own brand credentials with celebratory chef Gina D'Acampo.
- **Waitrose** continues to focus on personalised offers, Wine and branded deals.
- **Ocado** are also using branded offers, back to university and offering priority Christmas slots for Smart Pass members.
- **M&S** continue to communicate lower prices and are expanding their 'Dine-in' offers.
- **Poundland** timed their offers around various events including back to school, The Great British Bake Off and Halloween, as well as offering 'Big Brands, Small Prices'.

INCLEMENT WEATHER AT THE START OF THE NEW ACADEMIC YEAR HELD BACK SALES

Year on year growths



Source: Nielsen Scantrack Total Store Read

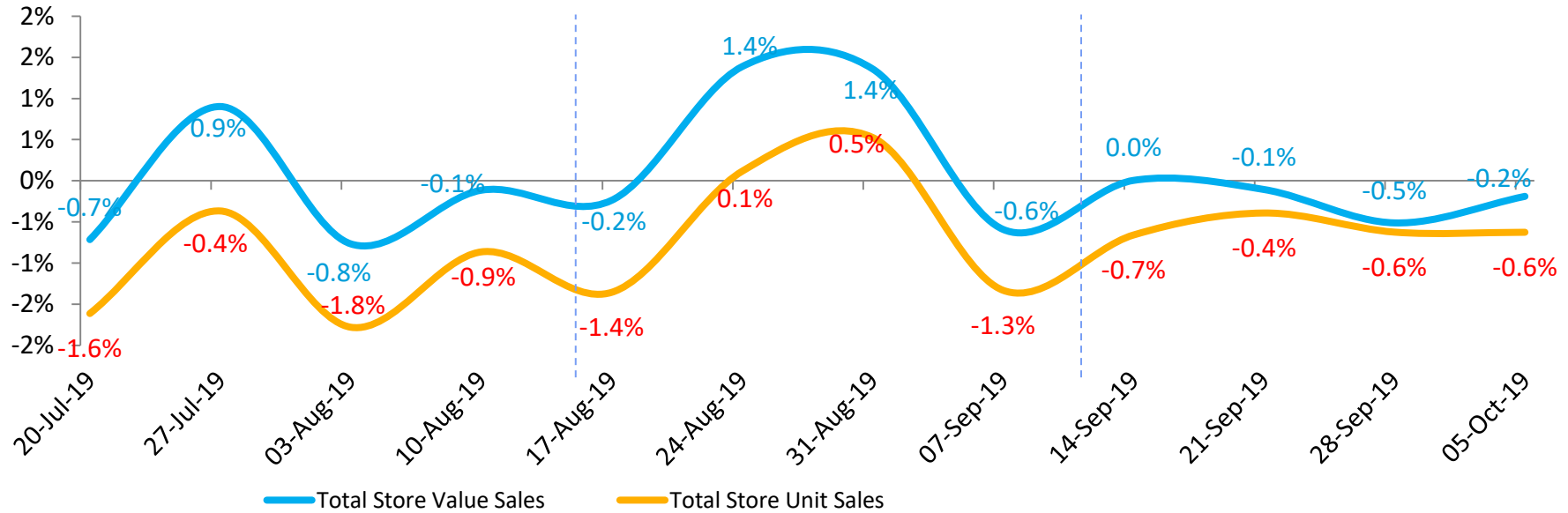
MOMENTUM IN FOOD RETAIL IS SLOW, REFLECTING THE MOOD OF THE NATION, WITH SHOPPERS STRETCHING THEIR BUDGETS BY SHOPPING IN 'VALUE' RETAILERS AND ONLINE

TOTAL MARKET (incl. Discounters)	GROCERY MULTIPLES (incl C stores)	ONLINE	DISCOUNTERS (ALDI AND LIDL)	HIGH STREET VALUE RETAILERS	CONVENIENCE STORES
+1.7%	0%	+6.3%	+8.2%	+3.3%	+0.6%
(Total Till)	(Scantrack)	(Homescan*)	(Total Till)	(Homescan*)	(Scantrack)
SHARE OF GROCERY SALES		8%	16%	4%	28%

*FMCG

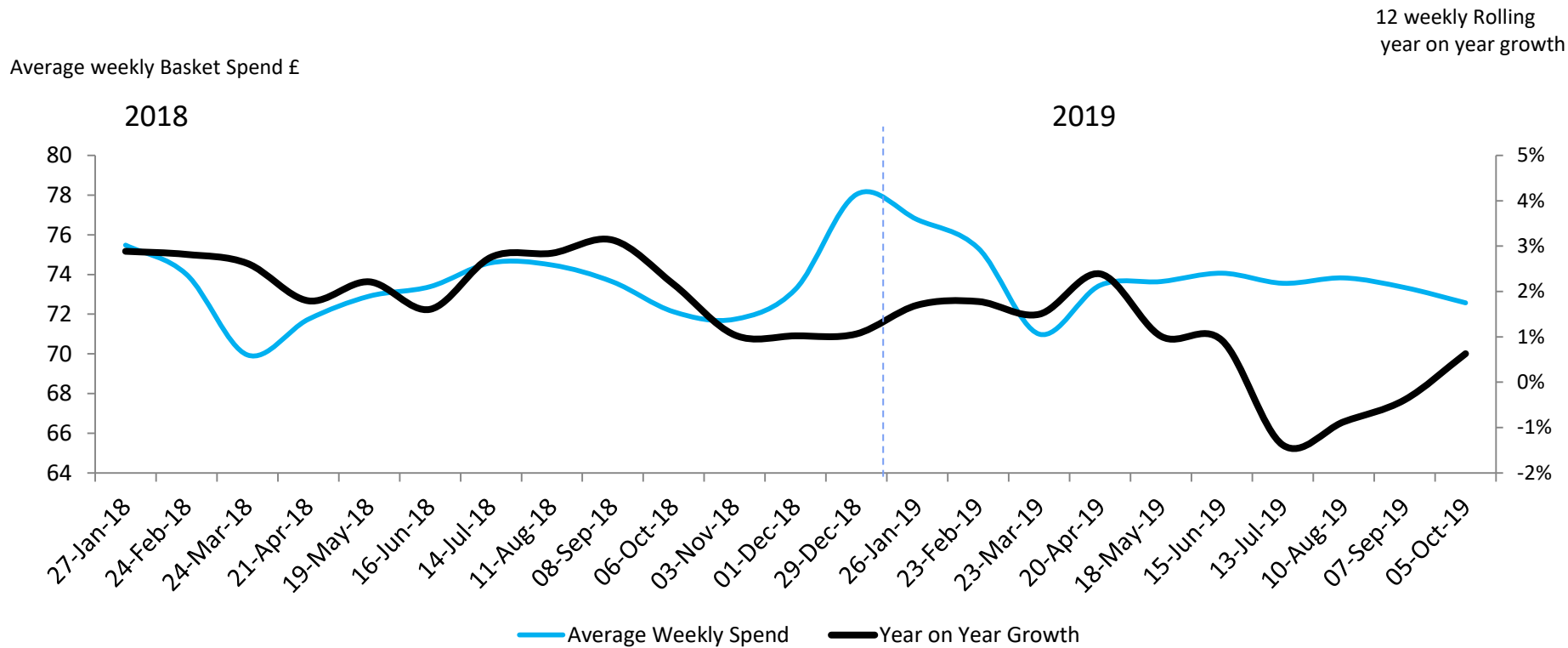
DEMAND IS WEAK AT THE GROCERY MULTIPLES, WITH SHOPPERS BUYING LESS DURING THE LAST 5 WEEKS AND SPEND, ONLY AT PARITY WHEN THE SUN SHONE MID SEPTEMBER

Weekly Year on Year Sales Growth Latest 12 weeks



Source: Nielsen Scantrack Grocery Multiples

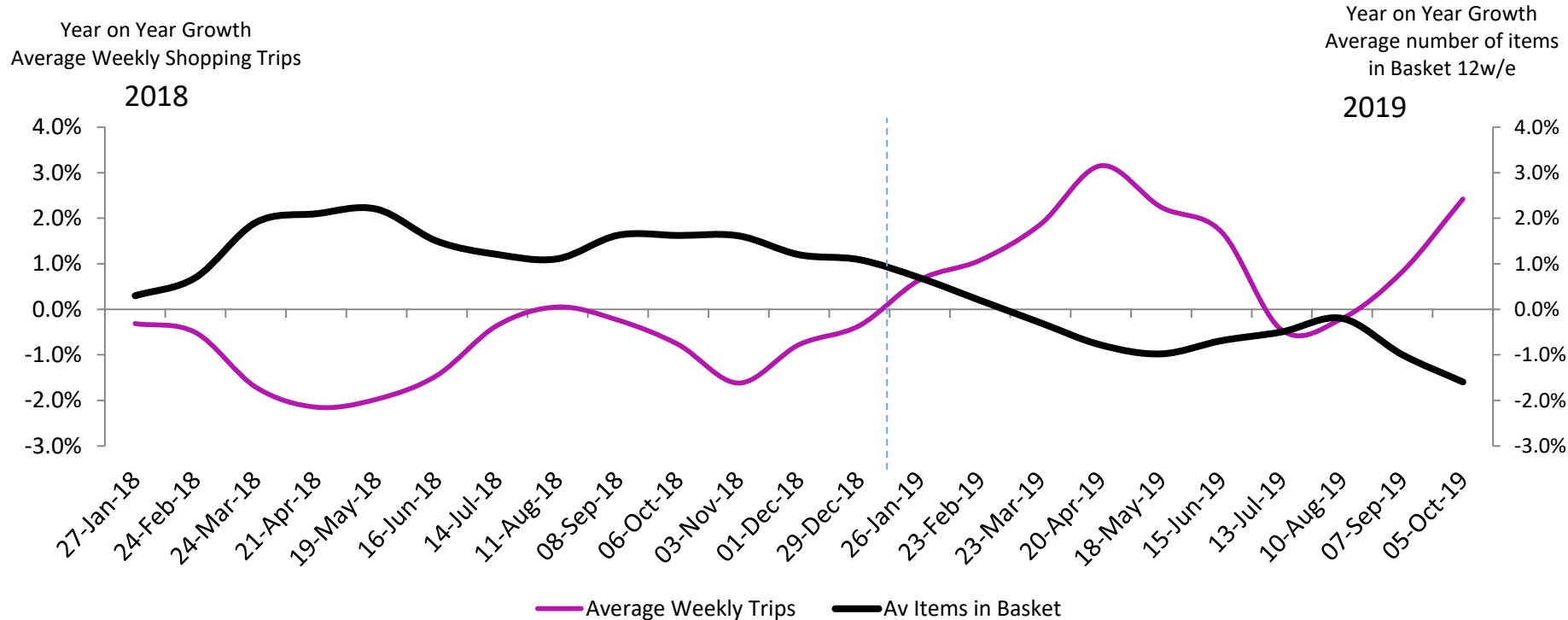
AVERAGE WEEKLY SPEND HAS SLOWED SINCE THE SUMMER AND WITH FOOD INFLATION NOW AT AN 18 MONTH LOW (1.1%*), SHOPPERS WILL NEED INCENTIVISING TO SPEND



Source: Nielsen Homescan Total GB 12 week ending

* Source BRC-Nielsen SPI (food) September 2019

A CHANGE IN BEHAVIOUR IS EMERGING WITH SHOPPERS SHOPPING MORE OFTEN BUT BUYING FEWER ITEMS, WHICH IS A TYPICAL STRATEGY TO HELP STAY WITHIN BUDGET



Source: Nielsen Homescan Total GB 12 week ending

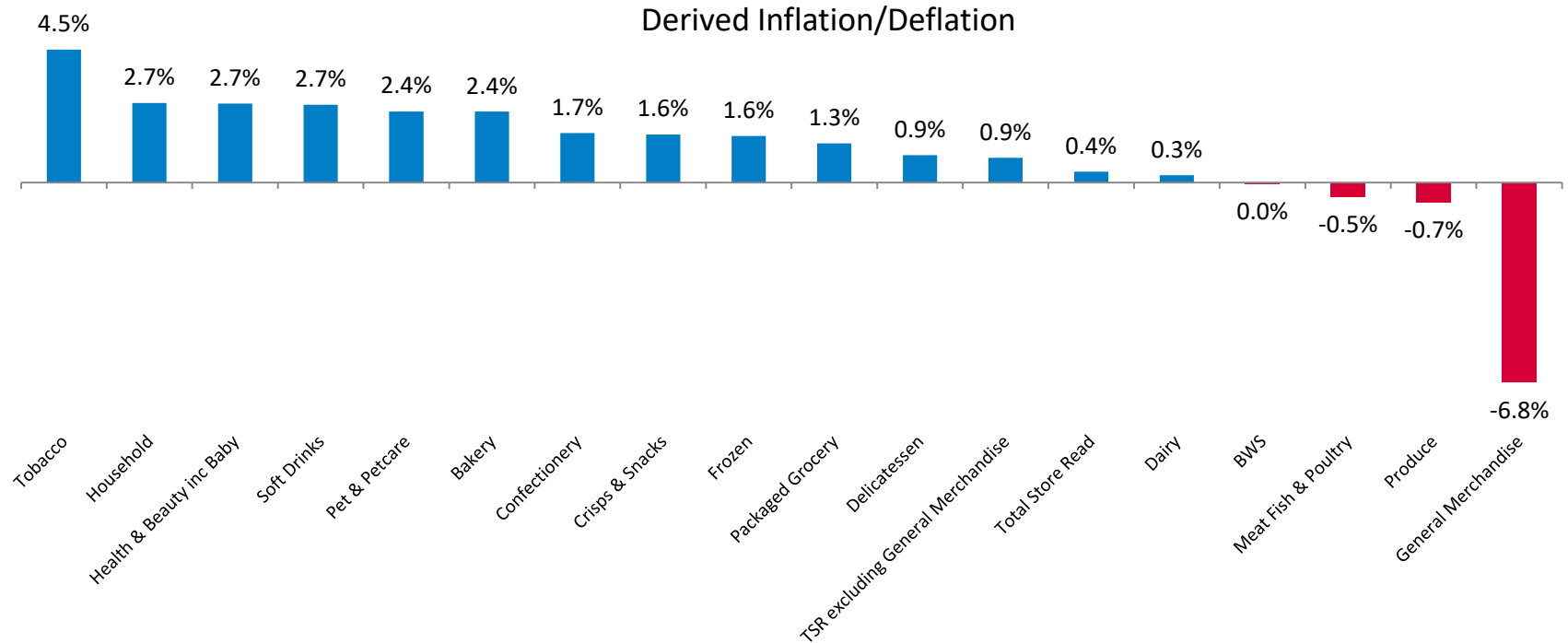
MOST CATEGORIES SAW GROWTH SLOW, WARM WEATHER IN EARLY SEPTEMBER HELPED TO LIFT SALES IN SOFT DRINKS, CRISPS & SNACKS AND ICE-CREAM

Grocery Multiples Value Sales Growth	y/e 05OCT19	12w/e 05OCT19	4w/e 06OCT18	4w/e 15JUN19	4w/e 13JUL19	4w/e 10AUG19	4w/e 07SEP19	4w/e 05OCT19
Bakery	1.9%	1.8%	0.9%	2.9%	2.7%	2.5%	1.8%	1.1%
BWS	1.2%	1.8%	3.9%	-1.5%	-6.7%	1.1%	3.3%	1.2%
Confectionery	4.3%	2.2%	2.8%	7.8%	7.9%	4.1%	1.5%	1.4%
Crisps & Snacks	4.4%	2.7%	5.7%	3.9%	0.1%	2.9%	3.0%	2.3%
Dairy	-0.3%	-0.9%	0.9%	0.7%	-0.6%	-1.2%	-1.0%	-0.4%
Delicatessen	-0.6%	0.2%	-0.1%	-1.4%	-3.7%	-0.7%	1.4%	0.0%
Frozen	0.5%	2.2%	1.9%	-1.7%	-4.9%	0.3%	4.3%	2.1%
General Merchandise	-4.0%	-3.8%	-2.9%	-7.7%	-6.3%	-1.0%	-5.3%	-4.7%
Health & Beauty inc Baby	-1.8%	-0.8%	-2.4%	-2.1%	-2.5%	-1.5%	0.0%	-0.9%
Household	-0.1%	-1.1%	0.4%	-0.8%	-1.3%	-1.4%	-0.8%	-1.2%
Meat Fish & Poultry	-3.0%	-2.7%	-1.6%	-4.0%	-3.3%	-2.4%	-2.3%	-3.5%
Packaged Grocery	0.8%	0.7%	0.0%	2.8%	4.0%	2.3%	-0.6%	0.4%
Pet & Petcare	0.8%	0.6%	1.5%	2.0%	1.6%	1.6%	-0.1%	0.2%
Produce	0.3%	1.0%	-0.2%	-2.7%	-2.1%	0.8%	1.8%	0.6%
Soft Drinks	2.0%	0.2%	9.4%	-2.8%	-10.4%	-5.8%	5.1%	2.7%
Tobacco	2.7%	1.8%	4.7%	-1.1%	-1.8%	0.2%	3.2%	2.0%
Total Store Read	0.0%	0.0%	0.7%	-1.3%	-2.5%	-0.2%	0.5%	-0.2%
TSR excluding General Merchandise & Tobacco	0.2%	0.4%	0.9%	-0.6%	-2.2%	-0.1%	1.0%	0.2%

EXCLUDING JANUARY AND EASTER, SHOPPERS ARE BUYING FEWER UNITS AT THE GROCERY MULTIPLES. BWS AND PRODUCE HAD THE BEST GROWTH THIS MONTH

Grocery Multiples Units Sales Growth	y/e 05OCT19	12w/e 05OCT19	4w/e 06OCT18	4w/e 15JUN19	4w/e 13JUL19	4w/e 10AUG19	4w/e 07SEP19	4w/e 05OCT19
Bakery	-0.6%	-0.7%	-0.7%	-0.4%	-0.4%	-0.3%	-0.5%	-1.3%
BWS	-0.4%	1.8%	0.6%	-3.4%	-8.9%	0.3%	3.8%	1.3%
Confectionery	3.0%	-0.3%	0.9%	5.9%	5.5%	0.8%	-1.4%	-0.3%
Crisps & Snacks	1.7%	0.0%	3.2%	0.1%	-3.1%	0.2%	-0.8%	0.6%
Dairy	-0.8%	-1.5%	-1.2%	-0.7%	-1.1%	-2.0%	-1.8%	-0.6%
Delicatessen	-0.9%	-0.7%	-0.9%	-2.6%	-4.5%	-1.5%	0.3%	-0.9%
Frozen	-0.5%	0.8%	1.2%	-3.3%	-6.7%	-1.1%	3.1%	0.5%
General Merchandise	-0.7%	2.0%	-4.7%	-1.7%	0.7%	3.1%	1.0%	2.1%
Health & Beauty inc Baby	-3.1%	-3.9%	-2.2%	-3.5%	-5.1%	-4.5%	-3.5%	-3.6%
Household	-2.4%	-4.1%	-1.7%	-2.1%	-2.9%	-4.0%	-4.5%	-3.9%
Meat Fish & Poultry	-1.6%	-2.1%	1.5%	-3.7%	-2.9%	-1.9%	-1.5%	-3.0%
Packaged Grocery	0.0%	-1.3%	-1.6%	2.9%	3.3%	0.5%	-3.4%	-0.9%
Pet & Petcare	-1.8%	-1.7%	-2.5%	-0.5%	-0.6%	-0.5%	-2.3%	-2.2%
Produce	-0.1%	1.0%	-0.4%	-2.4%	-2.6%	-0.1%	2.0%	1.2%
Soft Drinks	-0.9%	-1.3%	3.5%	-6.1%	-12.0%	-6.1%	3.1%	0.0%
Tobacco	-2.9%	-3.3%	-0.5%	-5.3%	-6.1%	-4.5%	-2.9%	-2.5%
Total Store Read	-0.5%	-0.7%	-0.5%	-1.3%	-2.5%	-1.2%	-0.5%	-0.6%
TSR excluding General Merchandise & Tobacco	-0.5%	-0.9%	-0.3%	-1.2%	-2.6%	-1.3%	-0.6%	-0.7%

DERIVED INFLATION IS LOW, WITH AMBIENT INFLATION AHEAD OF FRESH

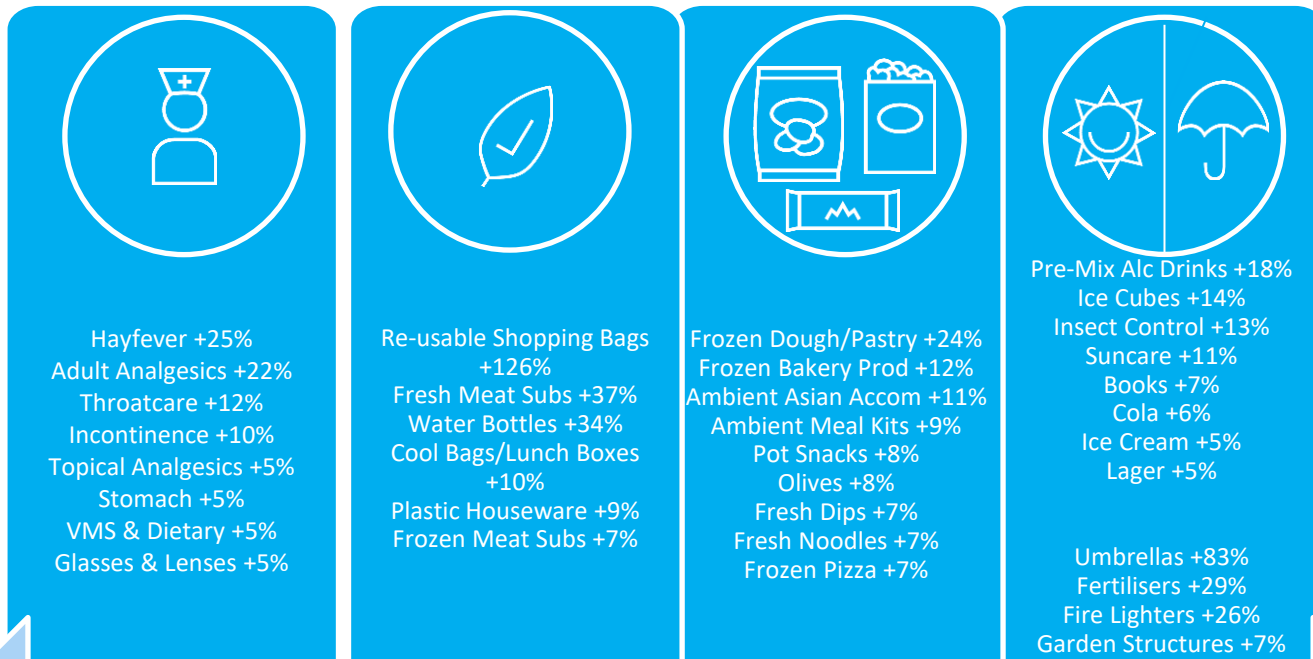


Source: Nielsen Scantrack Grocery Multiples, 4we 05th October 2019

* TSR Excludes General Merchandise & Tobacco

- Derived Inflation: Difference between Value Sales growth and Unit Sales growth

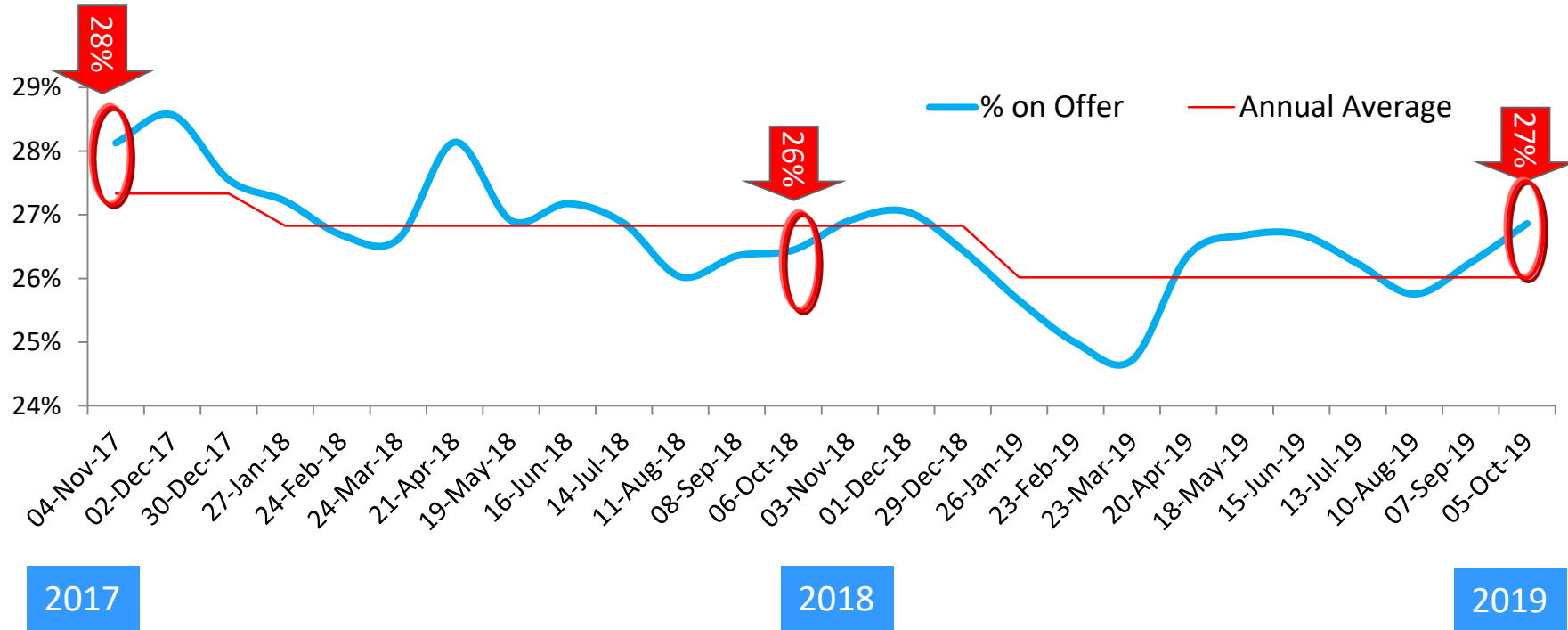
SEPTEMBER IS A WATERSHED PERIOD, MARKING END OF SUMMER AND START OF AUTUMN. MACRO TRENDS OF HEALTH, CONVENIENT OPTIONS AND SUSTAINABILITY ALL CONTINUED



Shoppers celebrated the end of Summer with drinks & ice-cream before reaching for their brollies and preparing their gardens for Autumn.

SPEND ON OFFER EDGED UP AGAIN AS THE INDUSTRY PUSHED OUT OFFERS AND VOUCHERS TO ENCOURAGE RELUCTANT SHOPPERS TO SPEND

% Exp On Offer: Total FMCG



2017

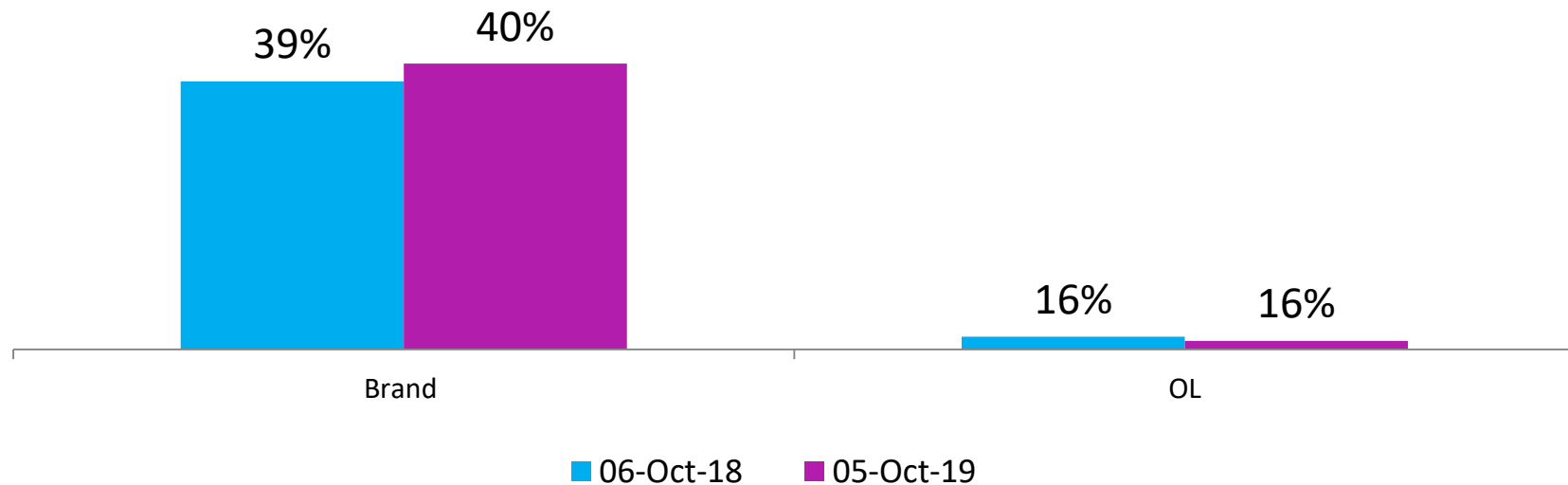
2018

2019

Source: Nielsen Homescan Grocery Multiples
4 weeks ending periods to 05th October 2019

MANUFACTURERS ARE DRIVING THE INCREASE IN OFFER SPEND AS RETAILERS COMPETE WITH HIGH STREET VALUE RETAILERS ON PRICE FOR THE NATION'S ICONIC BRANDS

% Exp On Offer: FMCG



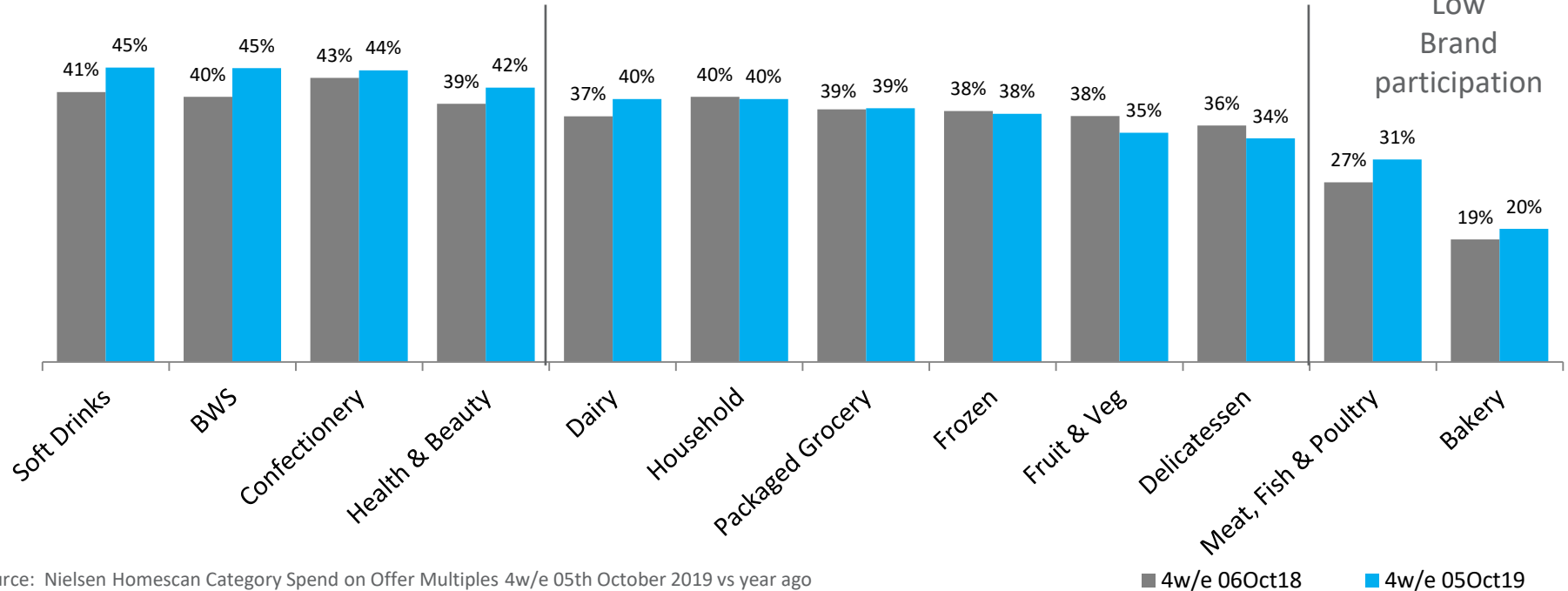
MANUFACTURERS ENCOURAGE SHOPPERS TO BUY MORE VOLUME IN THE IMPULSE CATEGORIES AND TRADE UP IN HEALTH & BEAUTY WITH ITS HIGHER AVERAGE UNIT PRICE

Branded % Spend on Offer

High promotion categories

Medium promotion categories

Low promotion &
Low
Brand
participation



Source: Nielsen Homescan Category Spend on Offer Multiples 4w/e 05th October 2019 vs year ago

■ 4w/e 06Oct18

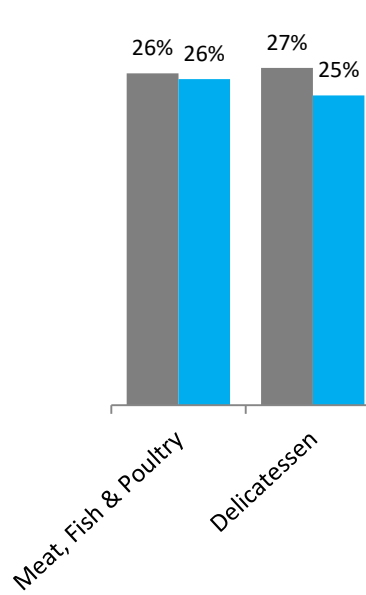
■ 4w/e 05Oct19

Value Sales bought on offer as % Total Value Sales by category

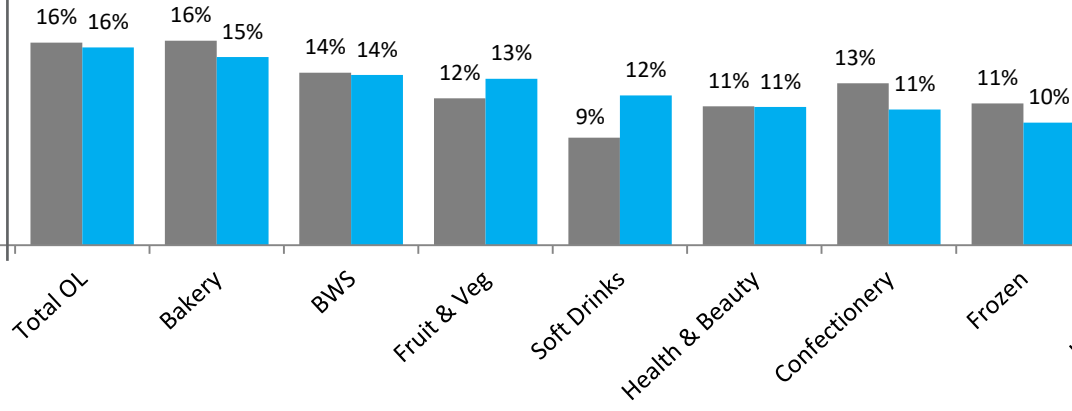
RETAILERS IN CONTRAST ARE PUSHING THE FRESH CATEGORIES, MFP AND DELICATESSEN

Own Label % Spend on Offer

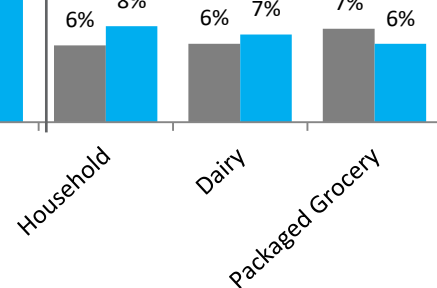
High promotion categories



Medium promotion categories



Low promotion & Low Brand participation



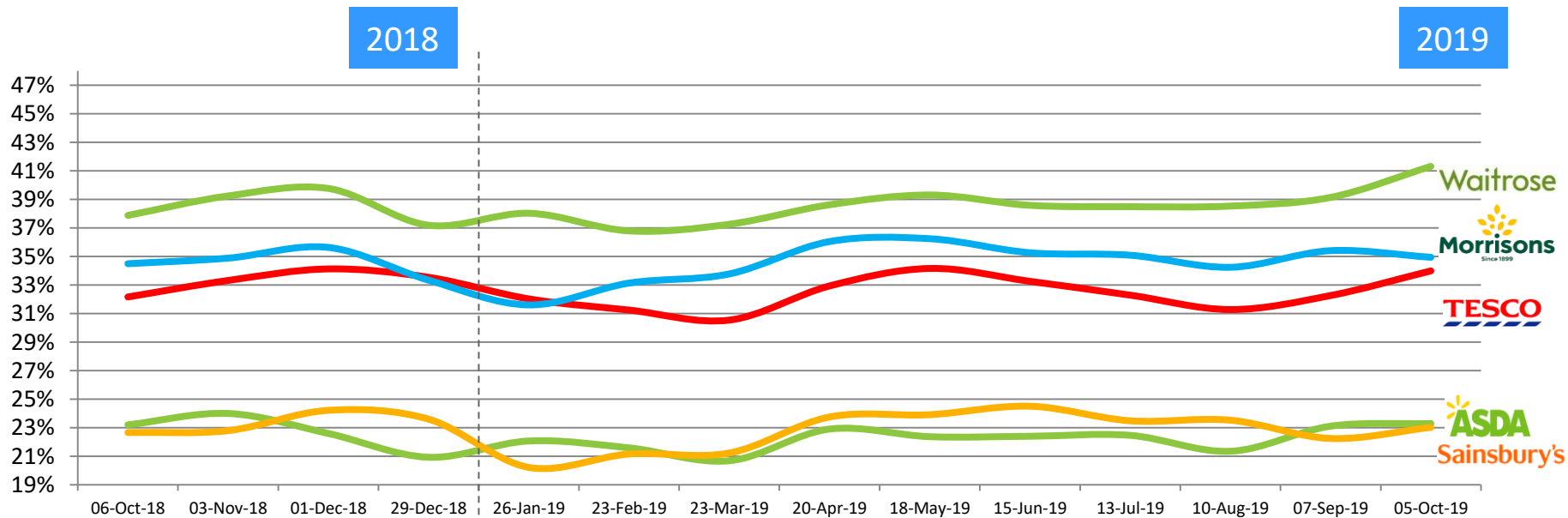
Source: Nielsen Homescan Category Spend on Offer Multiples 4w/e 05th October 2019 vs year ago
Own Label Value Sales bought on offer as % Total Own Label Value Sales by category

■ 4w/e 06Oct18

■ 4w/e 05Oct19

OFFER SPEND INCREASED AT TESCO AND WAITROSE. MORRISONS STILL HAS THE HIGHEST SPEND OF THE TOP 4, BUT THIS CROWN IS BEING CHASED BY TESCO

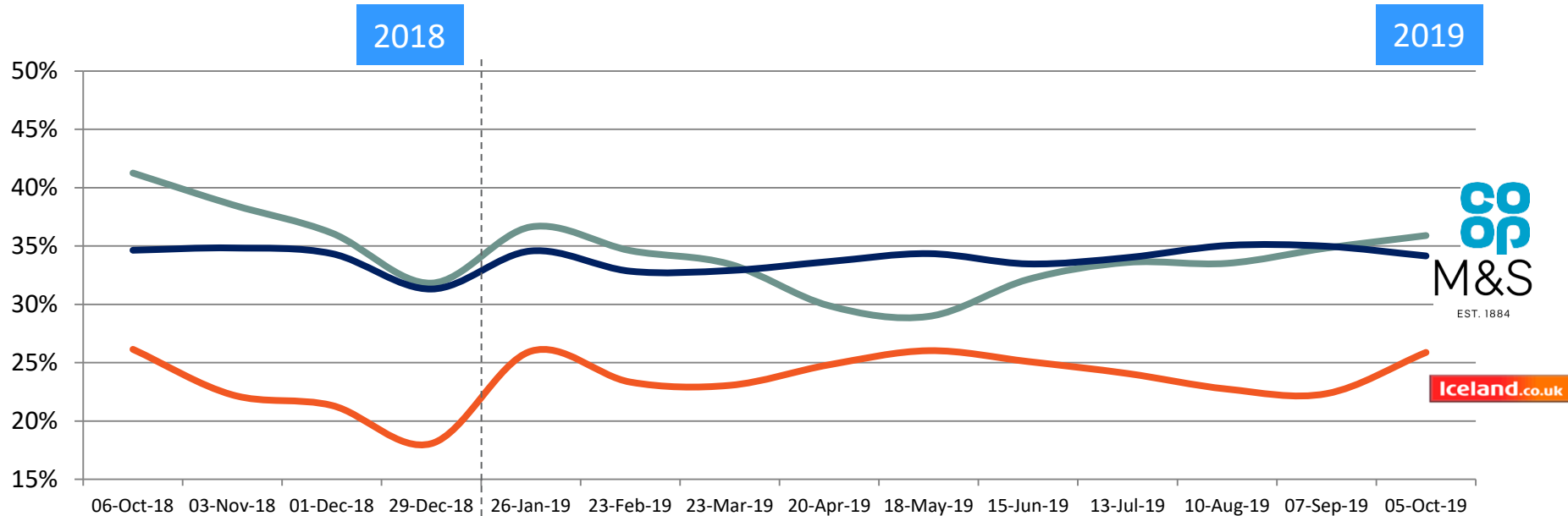
% Exp On Offer: Total FMCG



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CO-OP EDGED M&S ON OFFER SPEND THIS WEEK AND ICELAND TOPPED 26% FOR THE THIRD TIME THIS YEAR

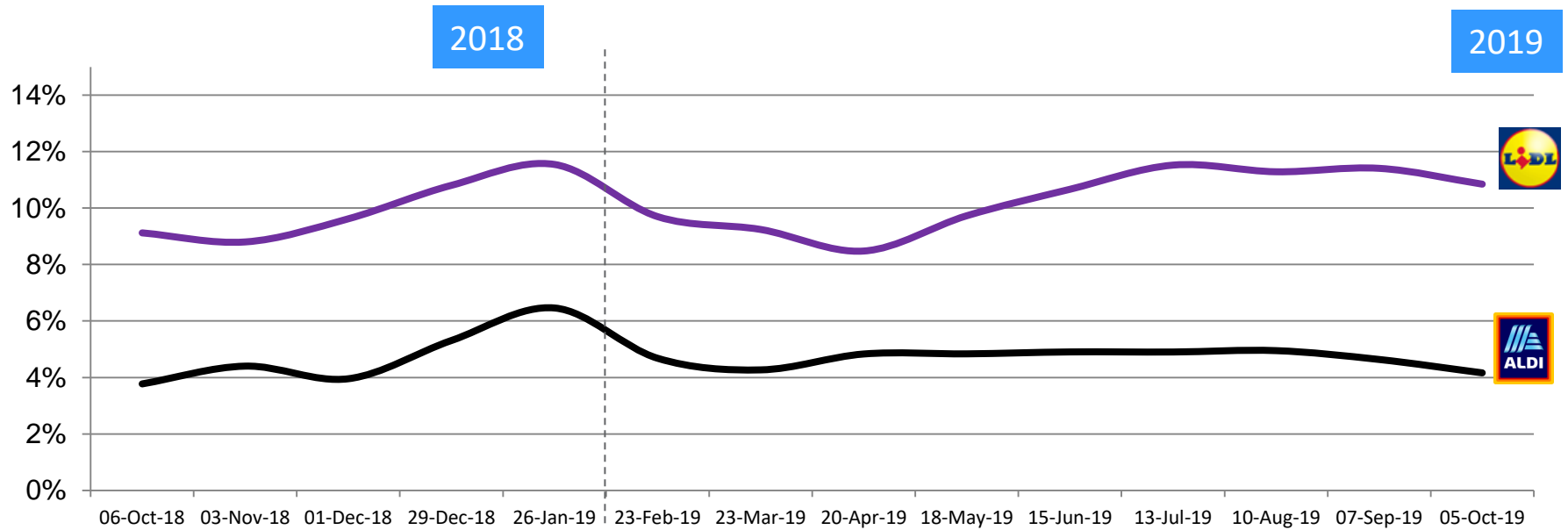
% Exp On Offer: Total FMCG



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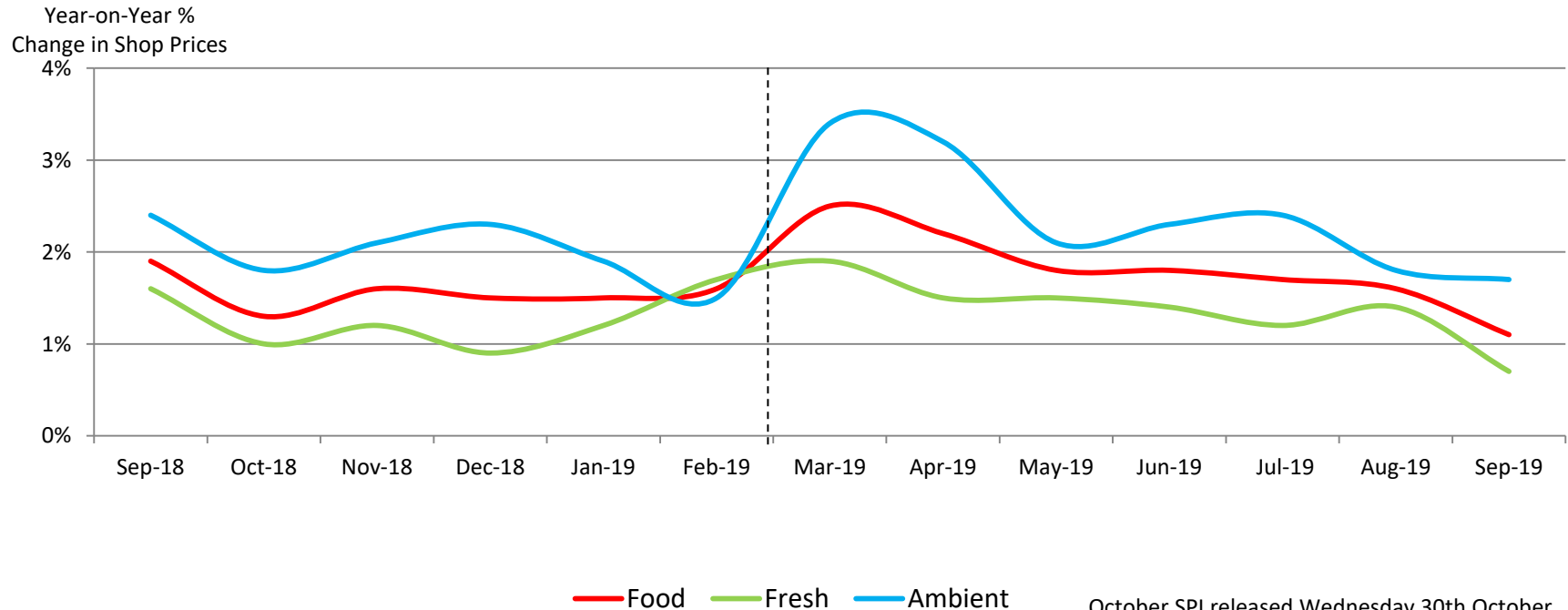
ALDI CONTINUES TO FOCUS ON THEIR LOW PRICE CREDENTIALS WITH THE LOWEST OFFER SPEND IN THE MARKET

% Exp On Offer: Total FMCG



• Source: Nielsen Homescan Grocery Multiples, 4 weeks ending periods to 05th October 2019

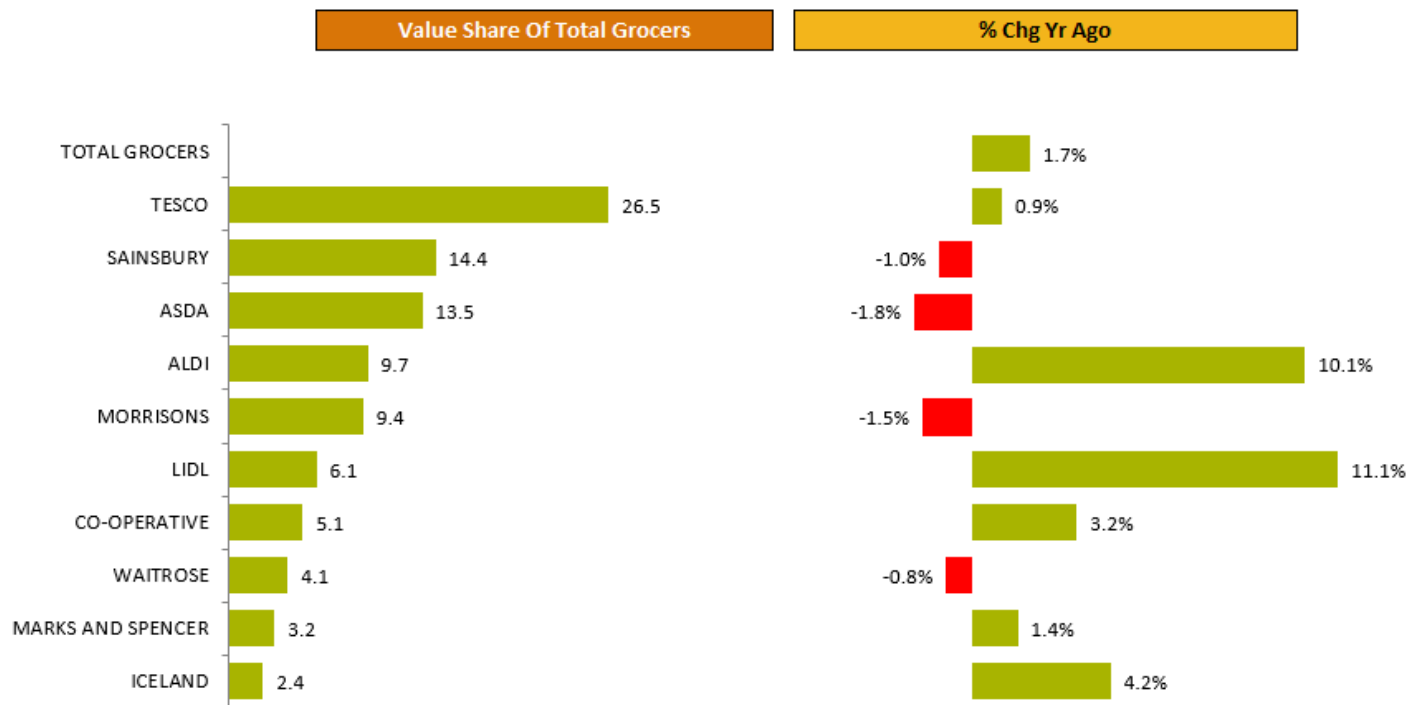
FOOD INFLATION EASED TO A 17TH MONTH LOW IN SEPTEMBER, EXPLAINED BY FRESH. REFLECTING LOWER DOMESTIC PRICES FOR VEGETABLES AND LOWER GLOBAL MEAT PRICES



Source: BRC-Nielsen SPI

AFTER A WARM AND SUNNY START TO SEPTEMBER, AUTUMNAL WEATHER TOOK HOLD, SALES AT THE TOP 4 WEAKENED AND SHOPPERS SPENT ELSEWHERE

4 Weeks 05 OCT 2019



Source: Nielsen Homescan Total Till 4 weeks ending 05th October 2019

TESCO LED THE TOP 4 BUT SHARE CONTINUES TO DILUTE AS TESCO ARE NOT ATTRACTING ENOUGH NEW SHOPPERS TO OFFSET DECLINING SHOPPER SPEND

FMCG share of Trade (Grocers)



4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	4 Weeks % Change in Value
27.2	27.0	1.1

Penetration

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change in Number of Shoppers
64.7	65.1	1.5

Average Spend per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£109.00	£108.60	-0.3

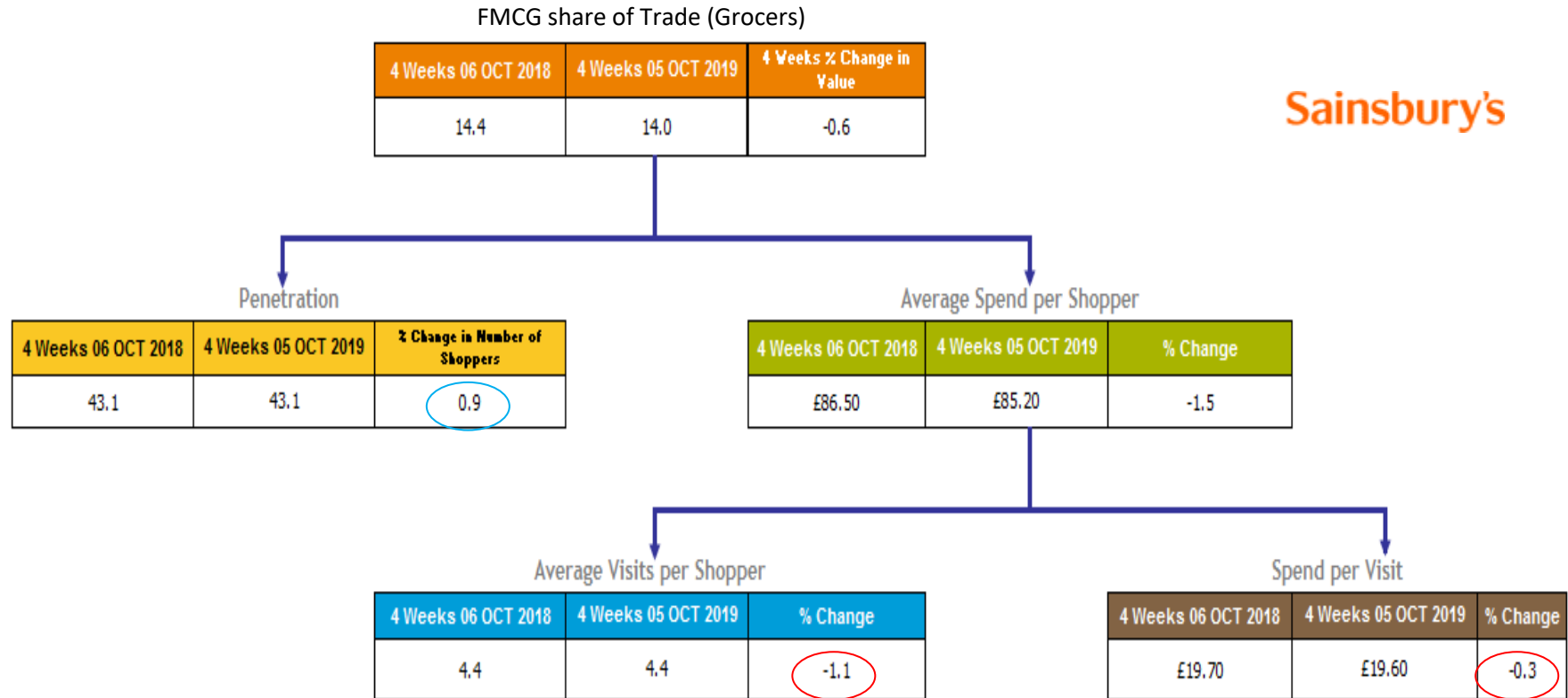
Average Visits per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
5.0	5.0	-0.6

Spend per Visit

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£21.60	£21.70	0.2

SAINSBURY'S ALSO NEED TO ATTRACT NEW SHOPPERS AND ARREST THE DECLINE IN SHOPPER FREQUENCY AND AVERAGE BASKET SPEND



ASDA ATTRACTED MORE VISITS BUT WILL NEED TO ADDRESS THE DECLINE IN AVERAGE BASKET SIZE WHICH IS A CONCERN GIVEN THEIR AVERAGE STORE SIZE

FMCG share of Trade (Grocers)

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	4 Weeks % Change in Value
13.1	12.7	-1.4



Penetration

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change in Number of Shoppers
43.3	42.9	0.0

Average Spend per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£78.30	£77.20	-1.4

Average Visits per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
3.5	3.6	3.2

Spend per Visit

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£22.60	£21.60	-4.4

OF THE TOP 4, MORRISONS ATTRACTED THE HIGHEST GROWTH IN NEW SHOPPERS BUT THIS WAS OFFSET BY A DECINE IN VISITS AND AVERAGE BASKET SPEND

FMCG share of Trade (Grocers)

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	4 Weeks % Change in Value
9.9	9.5	-1.3



Penetration

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change in Number of Shoppers
33.9	34.3	2.1

Average Spend per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£75.50	£72.90	-3.4

Average Visits per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
3.5	3.5	-1.7

Spend per Visit

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£21.40	£21.10	-1.8

WHILST M&S STRATEGY TO TARGET 'BIGGER BASKET' SPEND MAY BE RESONATING FEWER SHOPPERS THIS MONTH WILL BE A CONCERN

FMCG share of Trade (Grocers)

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	4 Weeks % Change in Value
3.4	3.4	1.4

M&S
EST. 1884

Penetration

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change in Number of Shoppers
21.3	19.4	-8.0

Average Spend per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£41.50	£45.80	10.2

Average Visits per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
4.0	4.1	3.3

Spend per Visit

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£10.40	£11.10	6.7

WAITROSE FREQUENCY THIS MONTH WAS 'SECOND ONLY TO CO-OP' AND WITH GROWTH FLAT LINING MAY SUGGEST A DIFFERENT SHOPPING BEHAVIOUR TOWARDS 'TOP-UP' IS EMERGING

FMCG share of Trade (Grocers)

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	4 Weeks % Change in Value
4.4	4.2	-0.7

Waitrose

Penetration

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change in Number of Shoppers
13.2	12.7	-2.8

Average Spend per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£85.60	£87.40	2.2

Average Visits per Shopper

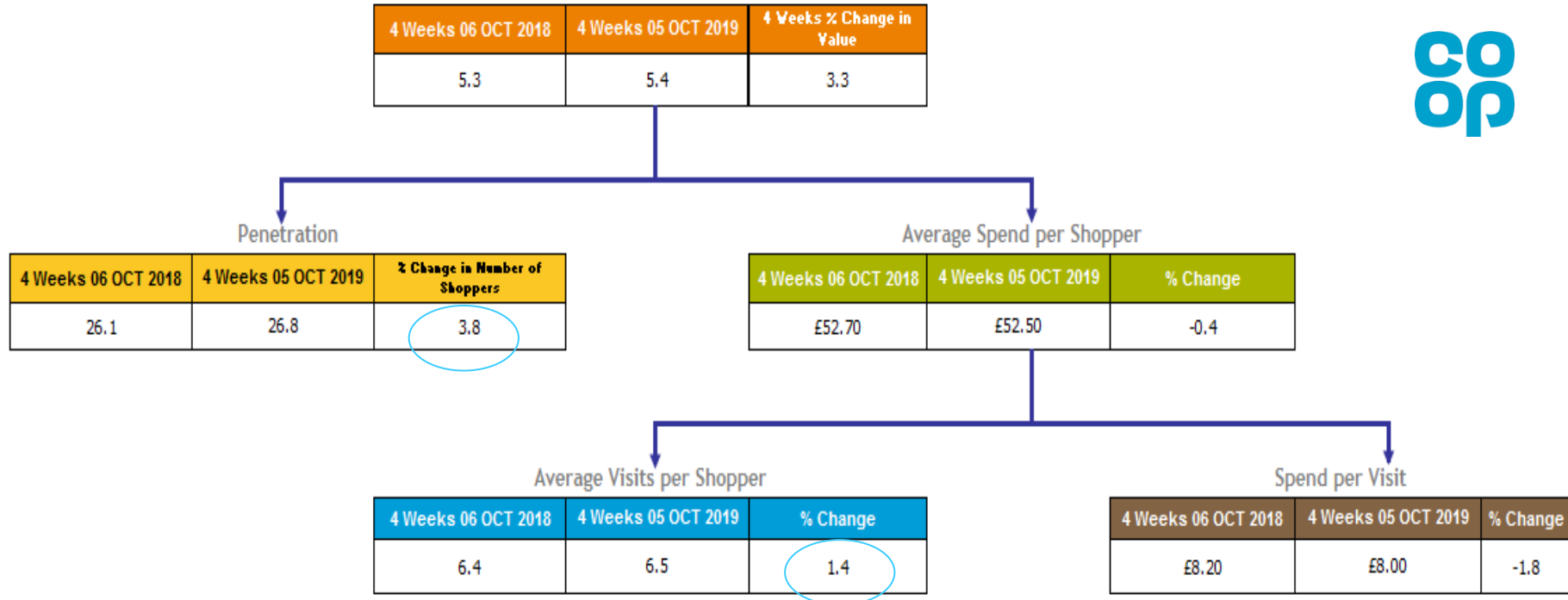
4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
5.0	5.4	7.4

Spend per Visit

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£17.10	£16.30	-5.0

THE BETTER WEATHER MID SEPTEMBER WILL HAVE BENEFITED CO-OP AND IS REFLECTED IN NEW SHOPPES AND MORE SHOPPING TRIPS

FMCG share of Trade (Grocers)



ICELAND'S FOOD WAREHOUSE, WIDER RANGE AND £5 VOUCHER OFF £20 SPEND IS ATTRACTING 'NEW SHOPPERS' AND IMPORTANTLY BIGGER BASKET SPENDS

Iceland

FMCG share of Trade (Grocers)

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	4 Weeks % Change in Value
2.5	2.6	4.2

Penetration

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change in Number of Shoppers
20.7	21.8	6.4

Average Spend per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£31.40	£30.80	-2.0

Average Visits per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
2.4	2.2	-9.6

Spend per Visit

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£13.20	£14.30	8.4

ALDI CONTINUES TO ATTRACT MORE SHOPPERS AND VISITS BUT TOPLINE GROWTH HAS SLOWED AND AVERAGE BASKET SPEND MAY BE REACHING A CEILING

FMCG share of Trade (Grocers)

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	4 Weeks % Change in Value
9.7	10.3	8.5



Penetration

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change in Number of Shoppers
38.4	40.5	6.6

Average Spend per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£65.50	£66.60	1.7

Average Visits per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
3.1	3.1	2.6

Spend per Visit

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£21.40	£21.20	-0.7

LIDL IS THE ONLY RETAILER TO HOLD/IMPROVE ALL METRICS IN SEPTEMBER AND WILL NEED TO MAINTAIN THIS MOMENTUM AS THEY ENTER THE GOLDEN QUARTER

FMCG share of Trade (Grocers)

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	4 Weeks % Change in Value
5.8	6.1	7.4



Penetration

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change in Number of Shoppers
30.1	32.0	7.1

Average Spend per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£49.90	£50.00	0.3

Average Visits per Shopper

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
3.0	3.0	0.0

Spend per Visit

4 Weeks 06 OCT 2018	4 Weeks 05 OCT 2019	% Change
£16.70	£16.70	0.3

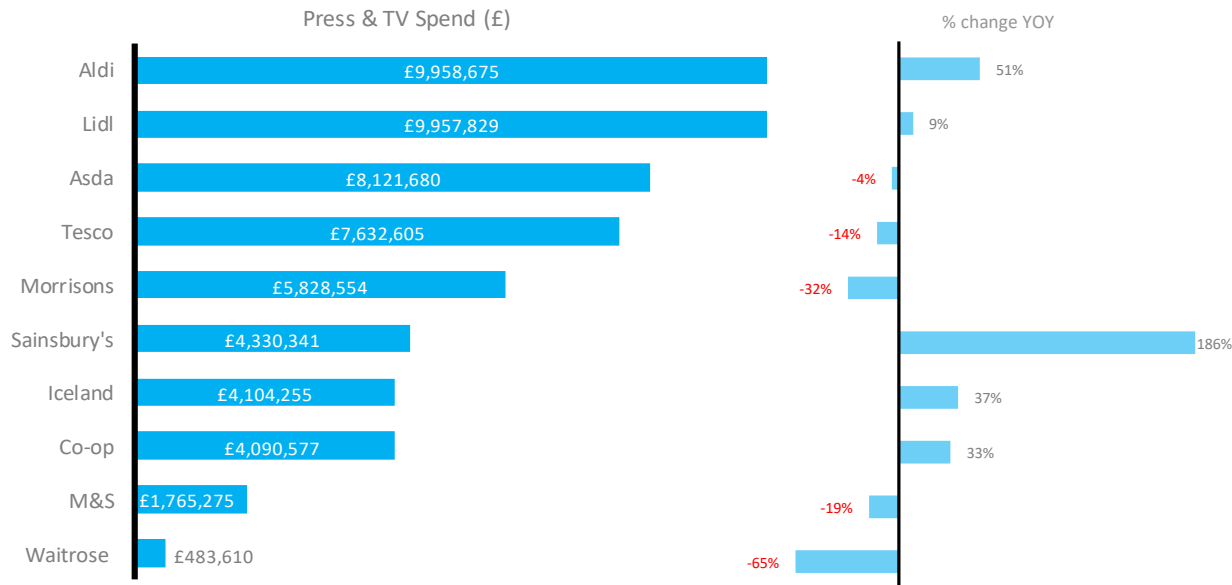
RETAILER ADVERTISING Q3 REVIEW

SPEND UP AS SAINSBURY'S CONTINUED ITS 150TH YEAR CELEBRATIONS

Supermarket FMCG TV and press spend increased by 6.7% year-on-year to £56m

July – September
2018
£52.7m

July – September
2019
£56.3m
+6.7%



Aldi (+51% year-on-year) was the top spender as it continued its swap and save campaign, highlighted its involvement with Team GB ahead of Japan 2020 and launched its 'Kit for Schools' programme. However Lidl (+9%) almost equalled Aldi's TV and press food & FMCG spend in the quarter as it continued its 'Big on' campaign. Spend was down at ASDA, Tesco and Morrisons but Sainsbury's increased its spend by £2.8m. As part of its 150th year celebrations, Sainsbury's promoted 'Price Lockdowns' on selected products for at least 8 weeks. Iceland (Gino D'Acampo range, 7 Day Deals, £5 off £20 spend voucher) and the Co-op (local causes, compostable bags) also recorded big increases in spend.

RETAILER MESSAGES LAST 4 WEEKS

NEWS BULLETIN: 100 YEAR'S OF GREAT VALUE, WITH BIG BRAND PRICE CUTS, 'PRICES THAT TAKE YOU BACK ..'



ENCOURAGING SHOPPERS TO TRADE UP WITH FUEL DEAL 5P OFF FUEL FOR £40 SPEND, 'BIG BRANDS LOW PRICES'





TARGETTED LARGER BASKET SPENDS WITH THEIR 'KIT FOR SCHOOLS' CAMPAIGN.

ALDI'S KIT FOR SCHOOLS
Get together | Get collecting | Get active

Win £20,000

for your primary school!

With Aldi's Kit for Schools, every time you spend £30 in store, you get a sticker for your primary school's Kit for Schools poster. Every completed poster will receive an Aldi Sports Kit and a chance to win your school one of twenty £20,000 prizes. Now term's started, you can really get stuck in so carry on collecting.

Find out more at aldi.co.uk/kitforschools
#AldiKit4Schools

TEAM GB
GET SET eat & fresh
ALDI

Enter via participating primary schools only. Stickers acquired from each £30 Aldi purchase. 6th Nov. Promotion open 01/09/19-03/10/19. Collect 300 stickers to complete the poster provided and claim a Sports Kit and be entered into the Prize Draw. 20 prizes of £20,000 each for schools available to be won. Standard conditions apply. Maximum of 1 cash prize per school. Send completed posters by 30/10/19 to Aldi. For full T&Cs see getseteatandfresh.co.uk/kitforschools

Iceland TARGETTED LARGER BASKETS, BY TEMPTING SHOPPERS TO TRY THEIR NEW & IMPROVED RANGE AND AUTHENTIC ITALIAN CUISINE WITH GINO D'ACAMPO ENDORSED MEAL VOUCHER AND £5 OFF £20 WITH HEAVY USE PRESS ADS AND COVER WRAPS

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DAILY EXPRESS
YOUR FAVOURITE DAILY NEWSPAPER IS INSIDE

FANTASTICO!
"Enjoy my new range of real Italian food. All made in Italy."

Iceland the food WAREHOUSE

GINO D'ACAMPO

Available in store and at Iceland.co.uk

"Enjoy a **FREE MEAL** on me this weekend... Buon Appetito!"

Iceland the food WAREHOUSE

Discover 550 NEW & improved products

- NEW Perfect **pie and mash** for a perfect Autumn night **£1**
- NEW Check out our **massive range** of chips **£1.50**
- NEW Have a big night in with our **Chinese takeaway meals** **£1.99**
- NEW Spice up your life with our **Indian takeaway meals** **£1.99**

GINO D'ACAMPO

Available in store and at Iceland.co.uk



MADE IN ITALY

"The kitchen was my classroom"

GINO D'ACAMPO

Available in store and at Iceland.co.uk

DAILY Mirror THE REALITY CHECKER
FOOTIE STARS SHINE STRAIGHT

YOUR PAPER IS INSIDE

£5 OFF When you spend £20

Discover 550 NEW & improved products in store and at Iceland.co.uk

Iceland the food WAREHOUSE

DAILY EXPRESS
YOUR FAVOURITE DAILY NEWSPAPER IS INSIDE

£5 OFF When you spend £20

Discover 550 NEW & improved products in store and at Iceland.co.uk

Iceland the food WAREHOUSE

£5 OFF when you spend £20 in store

Discover 550 NEW & improved products

Iceland the food WAREHOUSE

£5 OFF when you spend £20

Discover 550 NEW & improved products in store and at Iceland.co.uk

Iceland the food WAREHOUSE

DAILY Star YOUR SUPER PAPER IS INSIDE

£5 OFF When you spend £20

Discover 550 NEW & improved products in store and at Iceland.co.uk

Iceland the food WAREHOUSE

£5 OFF when you spend £20 in store

HURRY! OFFER ENDS TOMORROW NIGHT!

Iceland the food WAREHOUSE

£5 OFF £20

DIGITAL MESSAGES

WAITROSE PUSH AUTUMN SALE ON KEY BRANDS, WINE OFFERS AND CELEBRATING ORGANIC SEPTEMBER

Don't miss out on these great savings
Stock up on all the things you love for less.
on selected lines only

THE SALE SALE SALE SALE SALE SALE
AUTUMN SALE

SAVE 1/3 Make room in the fridge
Juices, yogurts, cheese and more...everything a busy family needs to keep them on the go.
[Save now](#)

SAVE 1/3 Store cupboard standbys
From cooking sauces to humble tins of baked beans, we've a host of long life goods for speedy support.
[Save now](#)

SAVE 1/3 Freeze for ease
A full freezer always saves you time, time and effort, especially with simple midweek meals. And if you haven't tried our ice cream yet, you're in luck.
[Save now](#)

SAVE 1/3 Sipping pretty
Relax and enjoy a refreshing moment. With great offers across our range of tea, coffee and soft drinks, you'll have plenty of options.
[Save now](#)

SAVE 1/3 Treat your body
Keeping you top to toe from head to toe, we have great offers on all your beauty and body care favourites.
[Save now](#)

SAVE 1/3 Household heroes
Everything you need at your finger tips to keep your home, clothes and bathroom squeaky clean.
[Save now](#)

WAITROSE & PARTNERS

CELLAR | WINE | CHAMPAGNE & SPARKLING | CASES OF WINE | OFFERS

SAVE UP TO 25% ON AWARD-WINNING WINES
Each of these excellent bottles has been acclaimed as a top wine competition.

[Show now](#)

Save 1/3
Taittinger Brut Reserve NV
~~Was £100.00~~ Now £72.00

Save 1/3
Brooks Cavill DOCG
~~Was £18.00~~ Now £10.25

Save 1/3
Chateau LaLonde d'Auvin Medoc
~~Was £18.00~~ Now £10.25

ORGANIC MONTH

Go organic
Celebrate organic month with our extensive range of delicious organic wines from around the world.

[Show now](#)

Two Chicks free range liquid egg white
20% Off

Magnum Mini classic, dark & mint 6 pack ice cream
Save 1/3

innocent super smoothie energy
Save 1/3

Alpro Chilled Almond Unsweetened
Add 2 for £2

OCADO PUSH MAGAZINE, INNOVATION AND HEALTHY OPTIONS, AUTUMN CLEANING AND BRANDED OFFERS, 'BACK TO UNI' AND EARLY PRIORITY XMAS SLOTS FOR SMARTPASS SHOPPERS WHILST M&S EXPAND THEIR 'DINE-IN' THEME, OFFER HEALTHY RECIPES WITH CELEBRATORY CHEF, WINE DEALS, SUPPORT MACMILLAN CANCER AND LOWER PRICES ON STAPLES

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TOP OFFERS
This month's best deals.

- MEGA VALUE! **BETTER THAN HALF PRICE** Finish
- SAVE 1/3** McCain **HOMe CHUMPS**
- BUY 1 ADD 1 FREE** Doritos
- BUY ANY 2 ADD 1 FREE** Indie Bay Pretzels
- Order by 8th Oct**
- New to Ocado**

It's a wonderful **ocadolife**

Good news, the latest batch of OcadoLife is here. We're celebrating wholesome baking and speedy delivery with special recipes. Plus, meet our special feature on sleep, skincare and more.

Add your favourite

Come all ye flavour

We know, we know, it's a bit early to mention the festive season but here on 29th September, it's an early start for you to ensure your Christmas delivery slot is good time, there's a few bits and bobs to remember.

So start shopping early! All that delicious food and drink that Christmas will bring, and take note of the delivery slot!

Shop your favourite

Ready for glem ahead?

BACK TO UNI

HALF PRICE Kettle

HALF PRICE anti-snore pillow

SAVE 25%

SQUEAKY clean SAVINGS

- NEW £11.50 WAS £15** Finish
- BETTER THAN HALF PRICE** Mylex
- HALF PRICE** Sponges
- SAVE 1/3** Sponges
- NEW £9 WAS £12** Sponges

Order by 8th Oct

THURSDAY 31ST OCT
THRILLING HALLOWEEN

M&M'S
CLAWS
Fruit Kibbles

Prepare to scare

M&S
EST. 1884

FOOD TO ORDER
DINNER FOR 8
£5 PER HEAD

DINE IN
with friends

This isn't just any Dine in... this is an M&S Dine in with Friends. Entertain 7 guests and yourself for just £5 a head. Also including 15% off selected wines with code **FRIENDS15**

WHAT A DIFFERENCE A CAKE MAKES

Throughout September, when you buy one of our Macmillan products in the Foodhall, we'll donate 10% to fund Macmillan professionals who help those living with cancer. Stop in store in time for this year's Coffee Morning on 27 September.

TELL ME MORE

COOK WITH M&S **AND Chris Baker**

COOK

EASY AUBERGINE PARMIGIANA RECIPE

Thanks to our talented chefs and recipe ideas from chef Chris Baker, it's so easy to make even the simplest of recipes. This week featuring our Cook With M&S Macmillan Recipe.

SEE THE RECIPE

NEW LOWER PRICE

£1 90p
Cherry Tomatoes Punnet 335g

SAME GREAT QUALITY, NEW LOWER PRICE

We've already dropped the prices of everyday staples across our Foodhall, from super soft bread to our RSPCA Assured milk, and now we're lowering even more prices on our M&S Select Farms fresh produce, like peppers, carrots and easy peelers.

Save 25%
Thursday

BUY 6 BOTTLES OF WINE, SAVE 25%

Valid in stores between Thursday 29 September and Monday 30 September

Don't miss out and stock up for party season with this limited offer on our award-winning wine and champagne.

Offer also available online when you buy two or more selected cases.

SHOP ONLINE NOW

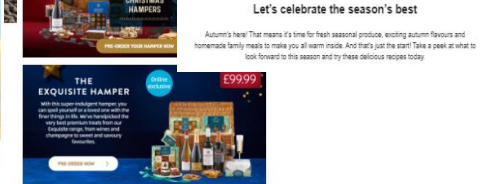
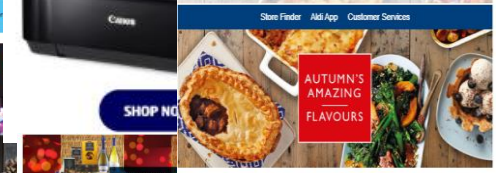
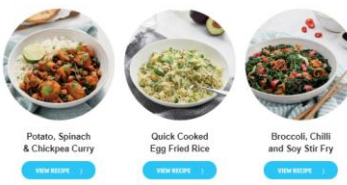
ALDI PUSH FIRST TASTE OF AUTUMN LAST CHANCE FOR GARDEN SHOP AND MAKE YOUR HOME AMAZING, PRINTERS AND AFFORDABLE PLANT BASED RECIPES NICELY TIMED FOR UNI, HALLOWEEN AND XMAS HAMPERS



Save £10 on Garden Shop when you spend £50 or more online! Voucher code **GARDEN10**



How to eat well at uni From healthy takeaways to scrumptious slow cooker meals that will help you make friends fast, we've got a whole range of tasty and quick, cheap and cheerful, back to university recipes to inspire your dorm-life meals.



POUNDLAND THEMED THEIR MERCHANDISE AROUND TIMELY OFFERS INCLUDING 'BACK TO SCHOOL', PEP & CO, BIG BRANDS SMALL PRICES, BAKE-OFF AND HALLOWEEN



NIELSEN OUTLOOK FOR THE GOLDEN QUARTER

- With a market slowdown in recent weeks, there is now a pressing need for all retailers to increase advertising and promotions, to get shoppers back into shopping mode after the half term holidays at the end of the month and `ready` for Christmas.
- Shoppers are becoming more discerning, the nations appetite for sustainability continues and shoppers are becoming more aware. Re-cyclable packing is no longer enough and shoppers also want to know brands are socially responsible and superior * in terms of function and performance.
- Price cuts are likely to be more popular as will promotions that offer extra savings for shoppers.
- Overall, consumer demand across retailing as a whole is weaker than a year ago and the underlying lack of momentum in food retail, particularly at the top4 supermarkets, is still a concern against the Brexit backdrop.

*Nielsen Global Sustainability Report