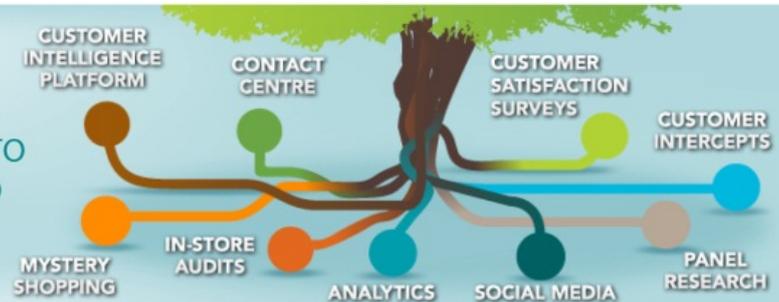


SUPERMARKET PROMOTIONS SURVEY RESULTS

CUSTOMER INTELLIGENCE MAKES SENSE OF WHAT YOUR CUSTOMERS THINK, DO AND SAY, EMPOWERING YOUR BUSINESS TO IMPROVE CUSTOMER'S EXPERIENCES AND INCREASE YOUR BOTTOM LINE



The following results are based on a survey of 4,103 UK consumers carried out exclusively for The Grocer by Market Force between 8th - 12th August 2012.

Supermarkets are driving 'brand match' promotions at the moment. Do you pay any attention to these? Do you believe them?

No, I believe it's just a marketing tactic	47.2%
No, I don't believe they keep the information up to date	8.4%
No, I don't pay any attention as I don't believe the information is correct	9.7%
Yes, I believe them and it makes me purchase the item	9.1%
Yes, I like to see that I am paying the same	25.6%

Do you visit specific supermarkets because of the supermarket 'promise' promotion?

Yes	17.8%
No	82.2%

If yes, which store have you visited in the past month due to the promotion?

Asda	42.1%
Other	3.8%
Sainsbury's	21.9%
Tesco	29.2%
Waitrose	3.0%

What supermarket 'promise' promotion is your favourite?

Asda's price guarantee	24.4%
None of these - I don't believe you really save on them	43.5%
Sainsbury's brand match	15.4%
Tesco's price promise	12.9%
Waitrose price commitment	3.9%

When it comes to a promotion - such as Asda's price guarantee where you have to print a receipt off to take it into the store to get your money back if you've paid more - do you take up the offer? Is it too much hassle?

No I don't - I don't think it's clear what you have to do	9.0%
No I don't - it is too much hassle	76.3%
Yes I always do	3.4%
Yes I do when it's convenient for me	11.3%

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What store do you think has the cheapest prices?

Asda	57.3%
Morrisons	11.5%
Other	16.3%
Sainsbury's	2.3%
Tesco	12.6%
Waitrose	0.2%

Generally speaking, would a promotion encourage you to go to a certain supermarket?

No, I don't have time to look for promotions	7.6%
No, I pick a supermarket because it's in a convenient location	14.9%
No, I shop somewhere because I like the customer experience	7.2%
Sometimes - if my budget is tight one month I will look out for the promotions	39.5%
Yes, I actively seek out the supermarkets with the best deals when doing my shopping	30.8%

What best describes your opinion on the supermarket promotions?

Builds my trust: I can see how the supermarket competes against others	14.5%
Confusing: I'm not sure what benefit I'm really getting	15.6%
Helpful: they help me see how much I'm saving by shopping there	35.4%
Unhelpful: I think it's a marketing tactic, not a real deal	34.5%

If you think the promotions are confusing or unhelpful, why do you think that?

I don't believe you really save	23.6%
I don't feel I've had any benefit from them	9.5%
It's difficult to remember to claim back the saving	10.1%
It's too complicated to check whether they've delivered on the promise	27.5%
The offer is not totally transparent so it's hard to see what the benefit is	23.9%
They do not communicate the savings very well	5.3%

Which of the following promotions is most likely to make you pick up items when doing your supermarket shop?

A percentage off i.e. 20% off	9.7%
An extra xx% free i.e. 30% free	2.2%
Buy one get one free	55.1%
Buy two for £xx	6.1%
None of these, I don't believe you really save on them	5.0%
Reductions on foods/goods near their sell by date	21.9%