

Putting the Value Back into SuperValu

SuperValu

Best On-Going Use of TV

June 2021



ENTRY DETAILS

Contact Name

Graham Clarke

Job Title

Client Director

**Agency / Company
Name**

**Starcom +
SuperValu**

Email

Graham.Clarke@starcom.ie

Phone Number

+1645 2965

Category

Best On-Going Use of TV

Entry Title

Putting the Value back
into SuperValu



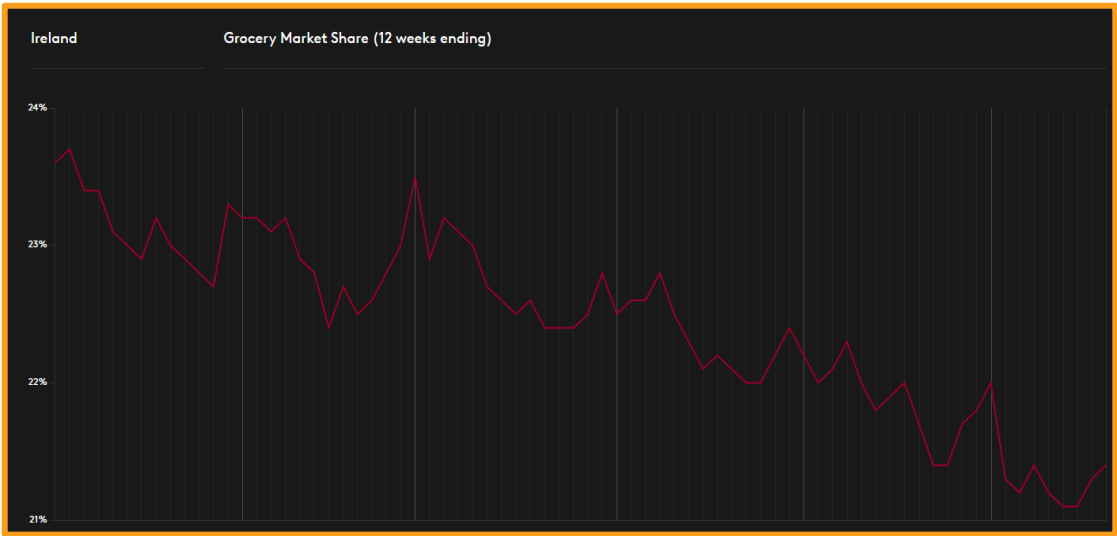
Summary Sentence / Headline

How SuperValu put *Value* at the heart of their brand to change consumer perceptions and take back the #1 retailer spot

BACKGROUND & OBJECTIVES

In 2019 SuperValu found themselves at a crossroads. After years of relentless pressure from the discounters their market share had been eroded to the point where they were now the 3rd largest retailer in Ireland. Over 5 years, from 2014 to 2019, Lidl and Aldi had grown their combined market share of 18.2% to 24.4%. At the heart of this erosion in share was perception of poor value for money in SuperValu. This was particularly acute within Dublin. Both discounters had used their competitive price position, aggressive store footprint, and their advertising spending power to steal market share from Dunnes, Tesco and SuperValu.

2.4% of their growth was taken directly from SuperValu who had recorded 5 consecutive annual declines in market share.



[REDACTED]

BACKGROUND & OBJECTIVES

Our challenge is therefore clear, if we can improve our value perception we can help turn around our declining market share.

To do this we needed to change our approach to TV. We did not have the big budgets of our discounter challengers, so we needed to focus on doing value well. That meant a change in our strategy. Working with SuperValu and TBWA, we developed the Value Story for SuperValu which would be fuelled by a long-term media and creative TV strategy.

Objective 1

Change the value perceptions of SuperValu and grow market share

Objective 2

Win in Dublin

This is a summary of how we created and employed a long term Value strategy to help change perceptions of SuperValu and ultimately regain the #1 spot in the retail category



We knew we could not take a short-term approach to this challenge, and it was not going to be fixed by running heavy TV campaign talking about cheap products. The path to success required a long-term strategic realignment to value.

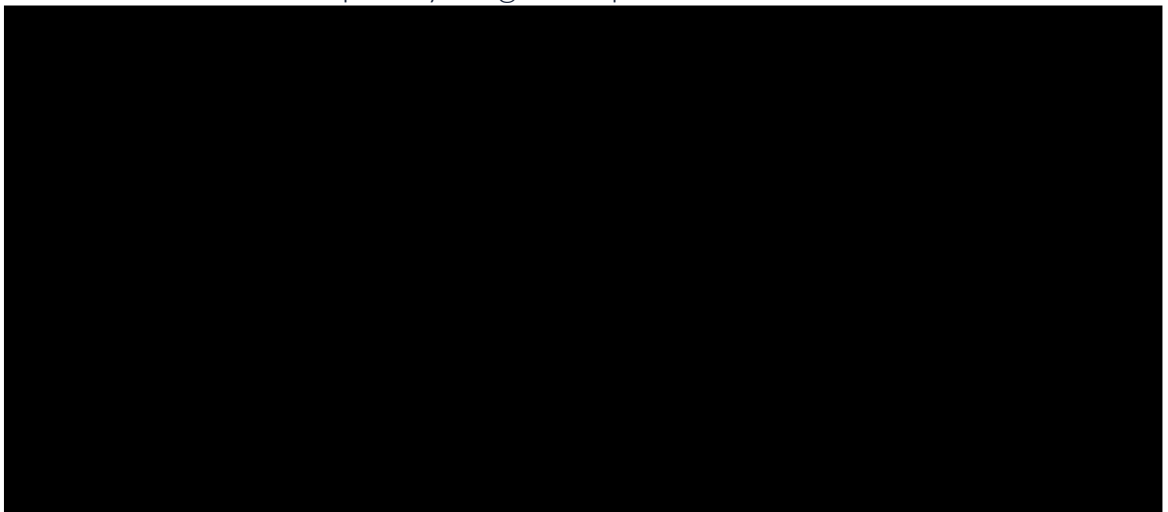
To help us achieve that realignment, it was crucial for us to have a consistent fluid device that would be the foundation to the strategy. This is what we called our Value Anchor. This Value Anchor had to be a single-minded message that would allow us to change the value perceptions of SuperValu, consistently, over a long period of time.

For SuperValu, Starcom & TBWA the Value Anchor of our TV media since 2019 has been Price Cuts. This is a brand creative message which talks about the SuperValu own brand range and communicates the extensive value available when shopping in SuperValu stores.

Our TV planning was upheld by a core insight which we discovered when researching previous SuperValu TV campaigns.

We had to speak about Value constantly, repeating it over and over and over again..

The Value Journey started in September 2019 and its most recent iteration was in January 2021. Each chapter of the journey had different communications objectives, ranging from Awareness to Consideration and Trail. Those objectives informed the effective frequency target we planned to.



And an ideal world we could be always on with heavy weight TV to support that strategy, but SuperValu do not have the spending power to match their competitors in the retail category.

	1	2	3	4	5	6	7	8
1			2016	2017	2018	2019	2020	2021
2	Advertiser	Media Type	Spend	Spend	Spend	Spend	Spend	Spend
3	Aldi Stores Ltd	Tv	4.542.039	5.182.292	5.376.601	5.298.035	5.902.742	1.555.121
4	Dunnes Stores Ltd	Tv	627.220	442.676	1.947.924	1.574.587	2.226.037	0
5	Lidl Ireland Gmbh	Tv	4.185.883	5.610.736	3.574.139	4.239.488	5.062.145	1.469.374
6	Supervalu	Tv	2.441.191	2.985.519	3.842.119	3.444.505	3.756.005	900.536
7	Tesco Ireland	Tv	3.204.932	3.063.040	2.793.837	4.849.535	4.756.029	1.366.430

(Retailer TV spend 2016-2020, Ad Intel)

Reviewing best practice TV planning and working closely with SuperValu so they fully understood our approach, we introduced messaging strategy which would inform our TV planning and buying.

Depending on the message of the campaign, Value Anchor or Price and Item for example, we would plan to an effective frequency target which reflected the importance of the campaign.



This approach steered us away from focusing on share of voice or planning to competitor rating levels which in turn allowed us to utilise our budgets more efficiently and maximise the effectiveness of our TV campaigns throughout the year.

Chapter 1

To kick off the Value Journey we launched our first Price Cuts campaign. The main communications objective of the campaign was to build awareness of the range and get our audience to reappraise SuperValu in an impactful way. To do this, we ran a 6-week TV campaign where we top & tailed the 30" brand ad with an accompanying 10" that drove frequency and allowed us to showcase the breadth of range and the price points.

1. 30" brand ad delivering a 6+50% campaign frequency



2. 10" top & tailed with 40% of all brand ad spots



(30" brand ad, 10" P&I ad, Ad Intel)

Chapter 2

In Chapter two we were still in the infancy stage of introducing Price Cuts to consumers. We retained the Awareness communications objective but had to deliver on frequency as SuperValu wanted customers to understand there were 100s more cheap products in their range. To ensure we maximised the effectiveness of the campaign we made some planning changes

1. Maintained our effective frequency target to 6+ 50%

2. Upweighted the topping & tailing to 60% of spots over three weeks

Chapter 3

Following on from the opening few months of the Covid 19 pandemic, where we focused on safety and reassuring message, we re-introduced our value comms with Chapter 3 of the Value Journey. SuperValu had gained a lot of shoppers through the initial lockdown in March – primarily because people were encouraged to stay local and having a footprint of 223 stores nationally meant more people were shopping with SuperValu than ever before.

1. 40" brand ad planned to 5+50% target
2. 20" Top & Tailing 70% of all 40" spots
3. using the power of TGI Fusion

The specific business challenge was how do we keep these shoppers in SuperValu? Linked to this was how do we communicate the SuperValu value offering to these new shoppers before they return to their old shopping habits and return to one of our competitors. We developed an approach, which we had never done before around getting real shoppers, from the comfort of their own homes, to record themselves trying SuperValu range products and telling us what they thought. The main communications objective was Consideration and Trial, with a need to over perform in Dublin as it was the most competitive battleground.

Programme Grid

30 min	RTE1 Mon 27-01-20 (Top Up Shoppers)	RTE2 Mon 27-01-20 (Top Up Shoppers)	Virgin Media One Mon 27-01-20 (Top Up Shoppers)	Virgin Media Two Mon 27-01-20 (Top Up Shoppers)	Virgin Media Three Mon 27-01-20 (Top Up Shoppers)	Channel 4 R2 Mon 27-01-20 (Top Up Shoppers)	TG4 Mon 27-01-20 (Top Up Shoppers)	Sky One Mon 27-01-20 (Top Up Shoppers)
14:30:00	Discovery Service TV Index: 154,433	Discovery Service TV Index: 154,433	Discovery Service TV Index: 154,433	Discovery Service TV Index: 154,433	Discovery Service TV Index: 154,433	Discovery Service TV Index: 154,433	Discovery Service TV Index: 154,433	Discovery Service TV Index: 154,433
15:00:00	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875
16:00:00	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875
17:00:00	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875
18:00:00	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875
19:00:00	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875
20:00:00	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875
21:00:00	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875
22:00:00	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875
23:00:00	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875
24:00:00	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875	Today (with Paula and TV Index: 158,875

Chapter 4

The back to school period is always a highly competitive and loud time of year for the retail category. It is essential to cut through and communicate the value you can offer consumers in what is a typically expensive time of year. Having completed the first three chapters of our Value Journey we were in a strong position to re-introduce our Value Anchor messaging. We had built up enough awareness of the new creative platform so that we no longer needed to top & tail brand with P&I. This allowed us to focus on one piece of copy and hero it.

Our comms objective was to maintain momentum and drive action. Our TV planning/buying was targeted to



1. Plan to a single copy length of 30"
2. Effective campaign frequency of 5+ 50%
3. Dublin specific programming strategy

Chapter 5

SuperValu had one of its strongest years in 2020, benefitting from the local appeal and their pace of reaction to the Covid pandemic. Behind all this was an agile strategic messaging approach which shifted depending on the consumer mindset

We had built trust with consumers who now felt we supported them and their local communities, but also, we had achieved what we set out to in Sept 2019, consumers now believed we offered them value for money.

As we entered 2021, and Chapter 5 of the Value Journey, the communications objective was to display SuperValu's confidence in their value. We were now challenging people to try the range and become a believer too.

1. 5+ 50% effective frequency target

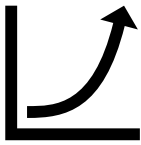
2. Dublin specific programming strategy



THE RESULTS

Although the journey is not complete, the results to date speak for themselves. At the end of 2019 SuperValu had seen instant results following Chapter 1 of the Value Journey

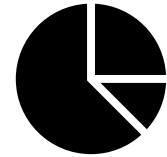
2019 RESULTS



Total sales and volume



National NPS for Value for Money

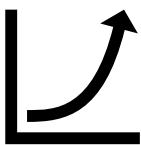


Market share grew by 0.4%

Dublin NPS for Value for Money

In 2020, where we had Chapters 2, 3, and 4 the results from our campaigns were even stronger. Partly due to COVID and supermarkets being a destination for shoppers across the period of restrictions. However, we have recorded strong growth in categories directly related to our Value Anchor campaigns;

2020 RESULTS



Total sales



Dublin NPS for Value for Money

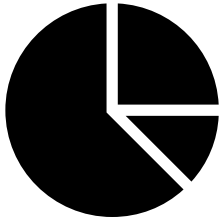


Market share grew by a further 0.4%

Dublin market share at

And finally, following our latest chapter (to date!) of the Value Journey we have continued to drive real business results for SuperValu.

2021 RESULTS



A FURTHER growth in market share

Since the conception of the *Value Journey* SuperValu's market share has grown from 21.4% to **22.5%**

In this same period, SuperValu are the retailer with the greatest growth (1.3%)



(Sept 2019 – April 2021 SuperValu Market share, Kantar)

The majority of the *Value Journey* took place during a time where consumers were under more pressure than ever. The combined unemployment of the non-working population and PUP claimants reached 20.2% during the pandemic. Consumers flocked to SuperValu because they knew, as a result of our long term Value strategy, that SuperValu would deliver them value for money.

CLIENT INVOLVEMENT



“TV was the main channel for us communicating the SuperValu ‘Low Prices’ message. We used the channel over a period of 18 months to build that association between Low Prices and SuperValu. We used real shoppers and our actual retailers in our communications – so the communication was real and authentic. This added to the shoppers ability to really resonate with the communication and which led onto the campaign being such a success and driving significant ROI in our campaign.

AV played a significant role in the success of the campaign, and the ability to adapt and tailor our messages across the full AV spectrum was a credit to Starcom. This campaign and strategic work can be directly attributed to SuperValu gaining the No. 1 position in the Irish retail market.”

Owen Lynch, SuperValu Brand Manager

Thank You

THE  **TAMIs**
Ireland's TV
PLANNING
Awards

SuperValu

STARBUCKS
COFFEE