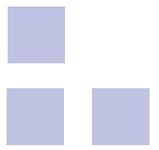




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points of view



CRACKING THE CODES OF VALUE

Casting a semiotic eye on UK retailer value ranges

The quest to offer and find value is centre stage, out-shouting last year's themes of authenticity, provenance, health, naturalness etc. that dominated consumer and marketing chatter. This is playing out in different ways, with Tesco's recent replacement of its iconic blue and white striped value line-up with a more comfortably retro-packaged Everyday Value range, seemingly changing the rules.

We decided to dig deeper, by applying a semiotic eye to the way that the major supermarkets package their "value" ranges. What does this tell us about the rules of the value game and what are the implications for brands?

The first thing that we see when we look at supermarket value ranges from a semiotic perspective, is the absence of the usual trappings of packaging; Value ranges (at least for the big 4 supermarkets and at least before Tesco's value revamp) have tended to be somewhat visually austere. And this is the first conclusion we can draw about one of the key rules of value range packaging - it is all about absence. But far from rendering these ranges marketing-mute, this lack of content actually speaks volumes about what they are saying to consumers - indeed about the very consumer they are constructing or implying through their codes.

The conventional and somewhat hopeful meaning of this absence, is that no money has been spent on anything other than hygienic containment of the product and basic information - stripped down to give the customer best value. However whilst this might be the spirit in which some consumers "read" these packs, they are obviously open to alternative and more complex interpretations, hence our semiotic exploration.

Tesco's move introduces an element of multi-coding into the mix and stretches the "absence" rule - with their Everyday value range apparently saying "value" but also offering some of the visual superfluity of branded packaging which is central to the pleasure of consumption. This seems to ask the question : is it possible that value ranges can meet the need to buy what I "want" rather than just what I "need" and to the identity projection that this frequently entails, yet still clearly say "value"? And what does this tell us about the way that the idea of value might be changing in consumer culture?

To understand the extent to which value ranges are speaking in new and different ways (and potentially to new and different people), let's explore the meaning of value range packaging in more detail, starting with the core code of "absence" - what exactly is "missing"?

Well what is principally absent is "unnecessary adornment" in the form of photography, benefits, serving suggestions, extensive colour palettes...in value ranges we



see a plethora of products with white backgrounds, simple retail master brand colourways, "handwritten" script fonts, line drawings of products... all shouting out that the retailer has grabbed a handy, plain box, chucked the product in and handwritten its name using only the leftover corporate colours that they have in anyway, so that you, dear customer, don't have to pay extra for the "unnecessary" packaging/marketing. This is, or has been, rule number 1 in value range packaging and it has been easy for consumers to interpret - if you want to buy (or if you have to buy) value products just look for the packs with the "design elements" missing (and the converse is true - if you want to avoid these products and what they might say about you, don't buy the plain packs!).



Enter Tesco's new range (and in fact Morrisons revamped M savers range also). In contrast to Sainsbury and Asda who remain loyal to the puritanically stripped down approach, Tesco seems to have responded to the new world by deciding that its value shoppers can have their Everyday Value cake and eat it, without being seen as "too poor to choose". But it remains, recognisably, a value range.

Another rule that Tesco has broken somewhat is "standardisation" - a classic feature of value ranges is often that all products look identical apart from the product name/illustration. All products in the Everyday Value range are less identical than previously, they do not carry exactly the same livery - they are recognisably of the same stable (same design theme) but are different colours & carry different visuals (product shapes). This perhaps provides just enough of a sense of individuality, difference & visual variety for the products to have some of the "unnecessary" adornment required for full participation in pleasurable and meaningful consumption! What's more the visual style and the product shapes have a loosely retro vibe and so connote a bang-on-trend idea of a simpler time of housewifely thrift.



Morrisons conforms to the minimalism codes of white background, no photography, no extraneous marketing language...but inserts individual, playfully naive product cartoon shapes. This again suggests a degree of rule-breaking via "unnecessary" thought, meaning and visual adornment which lifts the products from the more classic "just thrown into a plain box" value range.

However both these ranges can still quite clearly be understood as value ranges - through a recognisable consistency, simplicity and, of course, the dead giveaway language of "Value" and "Saver" ! But what's happening at the other end of the value market?

Those of us lucky enough to shop for groceries at Waitrose and M&S will know that these retailers seem to manage a balancing act of having a "value" range whilst not appearing to be "cheap". How do they do it and what does it tell us? Well first of all they have the customers who can afford to buy value without any "risk" to their identity and secondly they seem to have elastic brands which can stretch "down" whilst retaining a high quality perception. But there is more to it - let's look at how their pack designs work to create value ranges that are not only value ranges !

Waitrose' "essentials" range, first of all, conforms to many of the value codes we see operating in mainstream retailers. However Waitrose dresses its minimalist white essentials pack in nostalgic retro product drawings - ostensibly naive and simple (always communicating an absence of adornment) but at the same time connoting an idea of a time of both thrift and child-like security - this packaging evokes the design style (and thus world and values) of illustrated story books, the



covers of the Famous Five, Swallows & Amazons...

Then there is that word "essentials" - nothing as vulgar as basics, not value, no saving overtly stated. Rather the implication is that this is for the essentials that you need rather than want, and that you buy every day (and so do not need any "selling" codes). Another level of meaning suggests "stock & provisions" rather than "products and brands" - again playing positively to the Waitrose shopper self identity.



The M&S packaging interprets the value range rules in another way, by using simple product photography or the fresh produce itself, tied together with a "torn from a note pad and handwritten" label. Again the overt absence of "design" here is full of meaning. It says what all other value ranges say, that is "we haven't wasted money on a fancy design", but says plenty more besides. The use of the word "Simply" both underlines the "no unnecessarily spent money" idea and also alludes to the idea of daily essentials that Waitrose talks about. Most tellingly however, in place of the Waitrose retro book cover illustration, we see the casual "notepad" motif, oozing from which is semiotic leakage: it is hard not to place this shopping list in a number of contexts - a well stocked and well appointed middle-class kitchen or a shopping basket carried from store to store collecting provisions...

So as well as just saying "we are cheaper", all these ranges play in different ways with cultural narratives of need vs want, conspicuous consumption & cultural capital, puritanical rejection of adornment, the aesthetics of the Protestant work ethic, social class and ideas of thrift, nostalgia for a simple time when economic hardship was a shared everyday experience and was triumphed over with a shopping list and keen eye for a bargain...there is so much more going on here than value !

We can sum up the different retailers' value range packaging meanings as follows :
 Tesco = modest, de-stigmatised pleasure (with a hint of retro thrift);
 Morrisons = cartoonish, playful but no-nonsense simplicity;
 Asda = classic standardised, industrial value;
 Sainsbury = classic standardised, stripped down value;
 Waitrose = lashings of traditional, honest value and quality;
 M&S = wicker-shopping-basket provision-buying housewifery.

Time will tell which is the best approach to adopt and many other factors will affect customers' choices, but Tesco's move to de-stigmatise value product purchases not only seems well calculated to draw cash strapped bargain hunters who want a little more for their money than a plain box, from their competitors who are making no such changes, but also gently subverts the accepted codes of value packaging.

And what of the implication for brands? Well first and foremost, the introduction of more visually (and thus socially) acceptable value ranges can only mean more private label competition for them. It is interesting that grocery brands tend to have "premium" ranges but rarely value ranges -compare this with non-fmcg categories where there is more quality ranging and transparency within brands - e.g. cars, technology. Whilst the commercial complexities and risks of brands overtly offering "cheaper" ranges make that route somewhat difficult, brands should at least be aware of the way that even retailer value ranges are now offering some aspects of the "consumption experience" that brands offer to their consumers, but at half the price. And that should be cause for concern.

What this analysis has also demonstrated is that value is somewhat more complex than at first glance - even at this, the most apparently straightforward end of the value world. Far from being just about communicating a good price - value ranges, whether they intend to or not, are "talking about" related values of simplicity & housewifely thrift but also less obviously associated ideas of playfulness, quality, nostalgia & retro cool. And perhaps this is one of the more significant take-outs for brands: These emerging territories all provide hints at creative platforms for brands to have conversations with consumers about value, that don't lead inevitably back to price.