

STRATEGY CASE STUDY / BRAND & RETAIL

You Decide What's Worth It.

*Rebuilding consideration for Australia's most
distrusted supermarket without asking shoppers to
trust it again.*

CLIENT

Woolworths Group

DISCIPLINE

Brand strategy

AUTHOR

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LOCATION

Melbourne, VIC

Academic project, 2026 / Independent analysis, not affiliated with or endorsed by Woolworths Group.

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01 / THE COMMERCIAL PROBLEM

239

PLACES LOST / TRUST RANKING

In two years, Woolworths fell 239 places in Roy Morgan's trust ranking to become Australia's most distrusted brand. FY25 underlying net profit dropped 19.1%. Early FY26 sales growth was 2.1%, versus Coles at 4.9%.

Sources: Roy Morgan 2025. Woolworths Group FY25 Full Year Results, August 2025.

The commercial question: how do you earn back the weekly shop from a customer who has publicly told their social feed they're done with you?

02 / THE SINGLE-MINDED PROPOSITION

THE ORGANISING THOUGHT

You decide what's worth it.

NOT A TAGLINE

An organising thought for any execution. It does not ask for trust. It returns judgment to the shopper.

WHY IT WORKS

The barrier is identity, not price. Lapsed shoppers built their self-image around comparing, checking, deciding. The proposition honours that instinct instead of fighting it.

WHAT IT UNLOCKS

Woolworths stops defending its profits and starts equipping a decision. The shopper walks in on their own terms.

03 / HOW THE PROPOSITION WAS BUILT

Three moves from problem to idea.

Price cuts alone would not fix this. The brand needed to solve an identity problem: lapsed shoppers had turned leaving Woolworths into proof that they were smart. Any invitation back had to honour that identity, not challenge it.

THE BARRIER

Identity, not price.

Shopping at Aldi means I'm a smart shopper who puts my family first. Going back to Woolworths means I fell for it again. Leaving was not a reaction, it was a signal of who they are.

THE DRIVER

The instinct to compare is still alive.

The same shoppers who built identity on doing the homework never stopped wanting to judge for themselves. That instinct is frozen at one comparison made at peak anger. It can be reactivated.

THE PRODUCT TRUTH

Tools Aldi structurally cannot match.

Over 800 products held at Lower Shelf Prices through 2026, verifiable against CHOICE's quarterly government-funded reports. Best Unit Price filter. Over 20,000 own-brand lines versus Aldi's 1,800.

04 / WHAT I GOT WRONG

My first answer was wrong.

INITIAL HYPOTHESIS / ABANDONED

That the barrier was a loss of emotional connection to Woolworths as a local Aussie brand, and the fix was to lean harder into local sourcing and community support.

WHY IT FAILED UNDER REAL DATA

When I went to what people were actually posting on Reddit and TikTok, the anger was not about national identity. It was about prices and profits, named specifically. A "support local" message would have landed as more PR spin from a brand that had just lost 239 places in trust rankings.

The strongest strategic move I made on this project was deleting the first answer. Observing what people said, not what I expected them to say.

05 / EVIDENCE

Grounded in first-hand observation.

REDDIT / r/woolworths / 2025

First-hand consumer voice

A shopper documenting their switch: \$200 to \$300 per week at Woolworths, a first Aldi shop, and an active call to others to boycott. Anger is specific to price and profit, not identity or nationalism.

reddit.com/r/woolworths

ROY MORGAN / January 2025

The trust collapse, quantified

Woolworths fell 239 places in the trust ranking in two years, moving from one of the most trusted Australian brands to the most distrusted.

roymorgan.com

TIKTOK / Ella Victoria / 2024

How the comparison spreads

An item by item Aldi vs Woolworths grocery haul. Format matters: price comparison is now entertainment content, which makes the switching narrative self-reinforcing across the feed.

tiktok.com/@ella_victoriaaaa

CHOICE / quarterly, from 2024

The cultural check-for-yourself moment

Government funded price comparison surveys across 104 stores. 86% of Australians report worry over grocery costs. The cultural default is now verify, not trust.

choice.com.au

06 / WHAT SUCCESS LOOKS LIKE

A shift in one sentence.

BEFORE

“Woolworths is trying to trick me.”

AFTER

“I compared, and for what my family actually needs this week, it made sense to include Woolworths.”

Thank you for reading.

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