



Holiday Guide 2019

CPG MANUFACTURERS AND RETAILERS

The holiday season: a time when shoppers are loading their baskets for Thanksgiving, baking up a storm, and stockpiling alcohol for a month of get togethers. To win these all-important shopping trips, it's crucial to have a thorough understanding of your consumer and what drives their holiday purchasing decisions.

Read on for insights such as:



Thanksgiving Basket Affinities



Holiday Shopper Loyalty



Retailer Holiday Promotions



Alcohol Spend by Generation



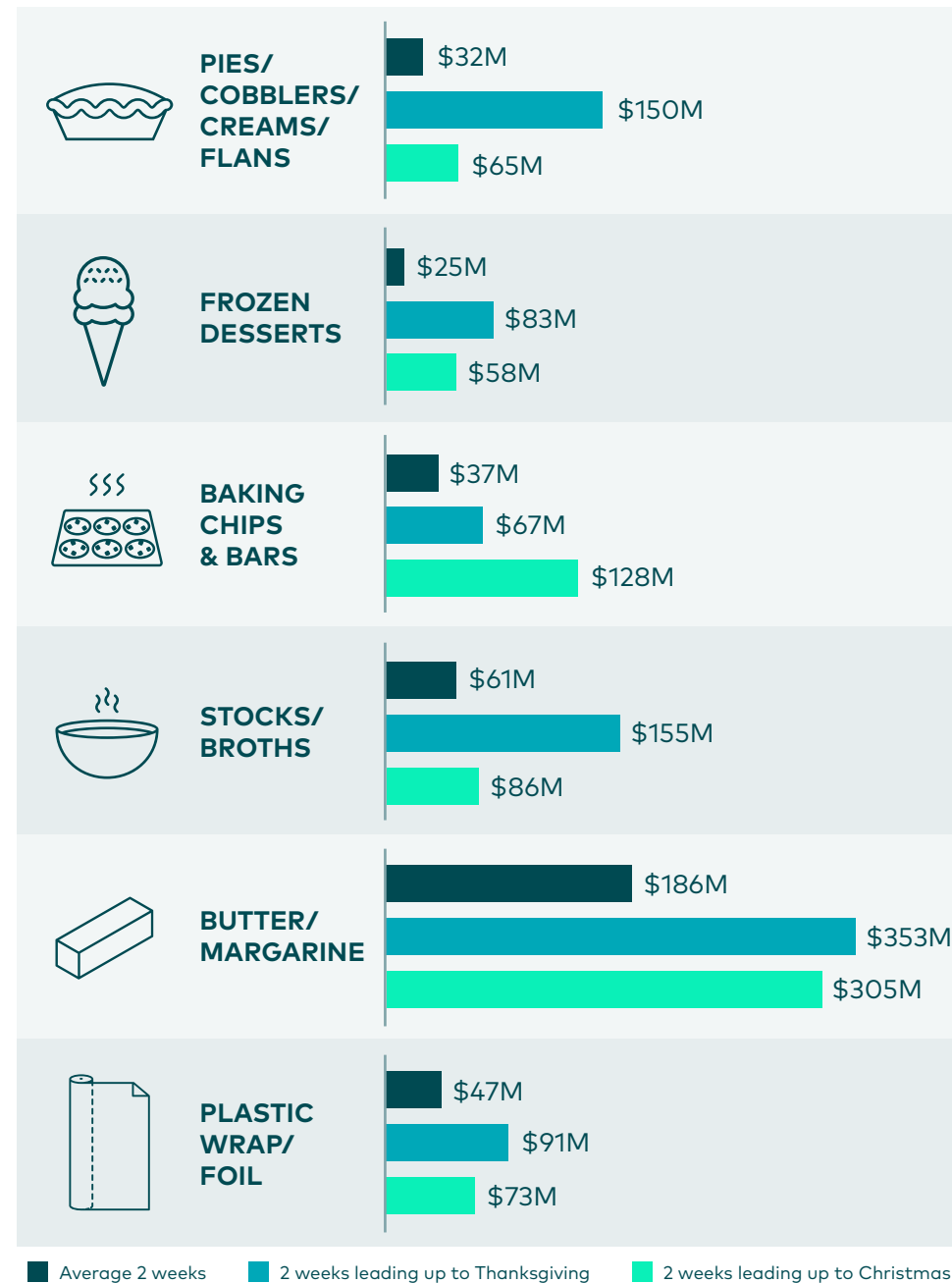
Top Promoted Categories



And more!

Categories That Spike During the Holidays

As expected, Thanksgiving purchases center around traditional meals and desserts (turkey, dressing, pie), leading to more prominent spikes in these categories. But once December rolls around, we see these spikes spread across a variety of categories, and key baking categories rise. Bring on the butter!

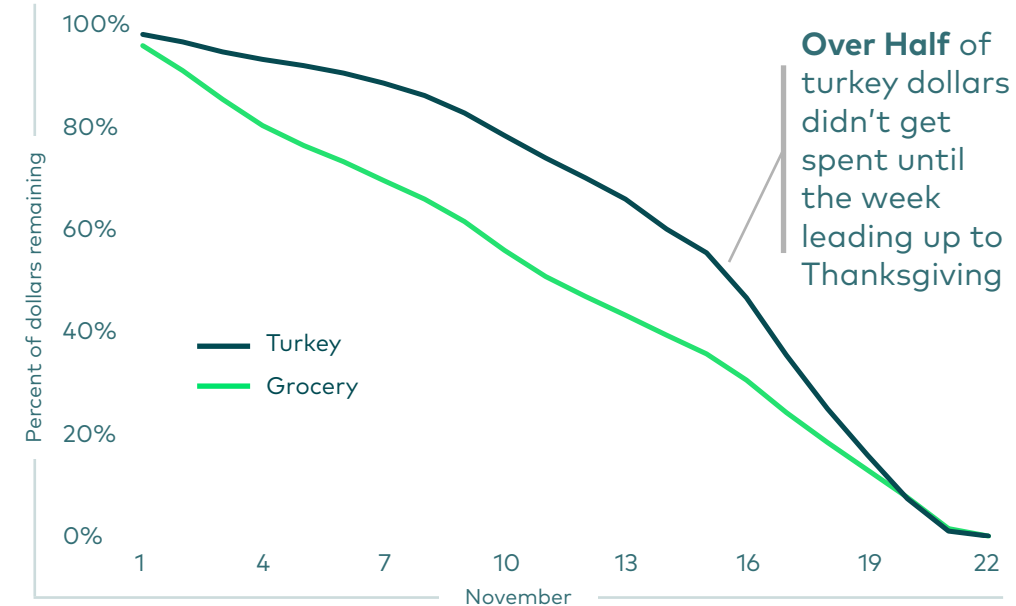


Source: Numerator Insights

Large Amount of Grocery Dollars up for Grabs

Grocery & Turkey Spend Remaining

November 2018



Total grocery spend was **\$40 billion** in November 2018, and total turkey spend was **\$250 million**.

Customers are less loyal when it comes to purchasing some of the top Thanksgiving categories.

"I plan to get my Thanksgiving groceries..."



Top 5 Items purchased outside of shoppers' regular store



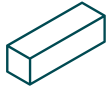


1. Turkey
2. Pies
3. Vegetables
4. Decorations
5. Wine

Source: Numerator Insights & Numerator Survey, n=504



Win the Turkey, Win Thanksgiving

Gobble, gobble! The Thanksgiving turkey is often included in the "final haul" shopping trip, where people purchase everything they need for their Thanksgiving feast. By capturing the turkey purchase, retailers are more likely to get the added bonus of these high-value stock up trips.

	BASKET AFFINITY	% OF TRIPS	IMPACT ON BASKET
 STOCKS/ BROTHS	740	10.2%	+ \$51.93
 PORK	696	10.4%	+ \$43.17
 BUTTER/ MARGARINE	604	17.4%	+\$51.64
 CANNED VEGGIES	602	13.8%	+ \$51.96
 SAUCES	580	18.9%	+ \$48.50

↑ Items most likely to be included in a basket with turkey

Thanksgiving Baskets with Turkey are 2.3x Larger

\$41.62



Average Grocery Basket Spend

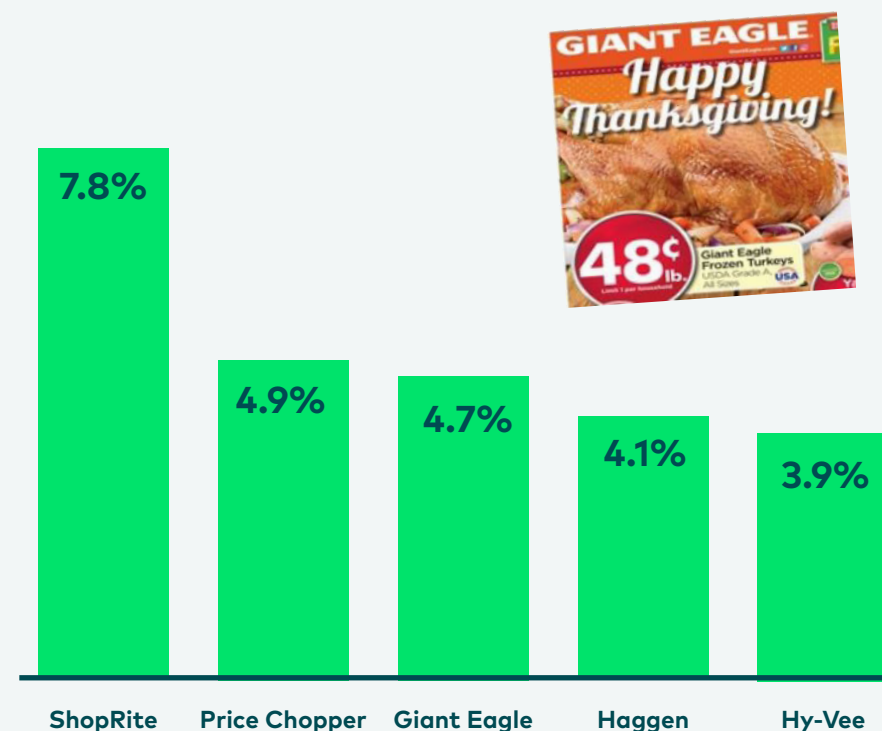
\$93.30



Average Spend with Turkey in Basket

Top 5 Turkey Promoters

by Share of Voice, November 2018



Promotion Commotion

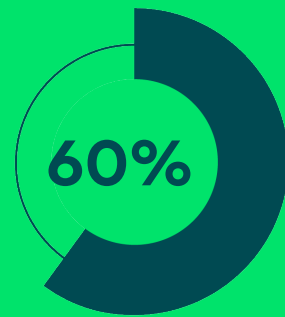
Top promoted categories during the holidays aligned closely with many categories that saw spikes in sales.

Top Promoted Categories, by Share

Print and Digital Circulars



Frozen	10.3%
Beverages	10.1%
Dairy	9.9%
Snacks	8.6%
Meat	6.5%
Baking Needs	4.3%
Canned Foods	3.8%
Store-Prepared Foods	3.7%
Paper Products	3.7%
Fresh Fruit	3.5%



of shoppers surveyed use print circulars to find deals on groceries.

Top Promoted Spirits, by Share

Print and Digital Circulars



Whiskey	27.5%
Vodka	23.8%
Rum	10.1%
Cordial	9.8%
Tequila	9.8%
Scotch	6.2%
Gin	6.1%

52% of shoppers surveyed compare prices at different stores before grocery shopping.

End of Year Holiday Season Wins in Alcohol Sales

Top weeks of Alcohol sales in 2018

Christmas \$1.2 billion

4th of July \$941 million

New Year's \$879 million

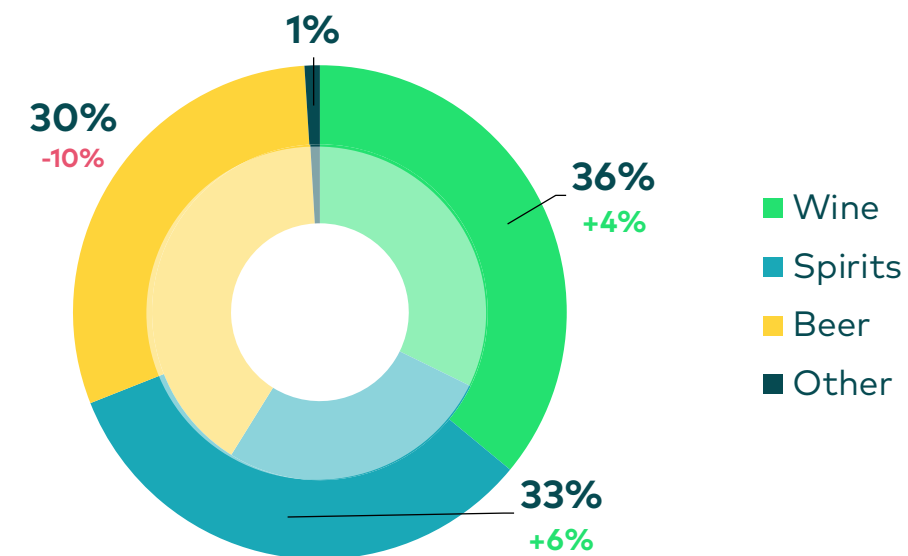
Thanks-giving \$962 million

Memorial Day \$928 million

Pre-Christmas \$855 million

Over \$2.9 billion in alcohol sales occurred in the final 3 weeks of the year.

Top Alcohol Categories for Christmas and New Year's (outer) vs. Full Year (inner)



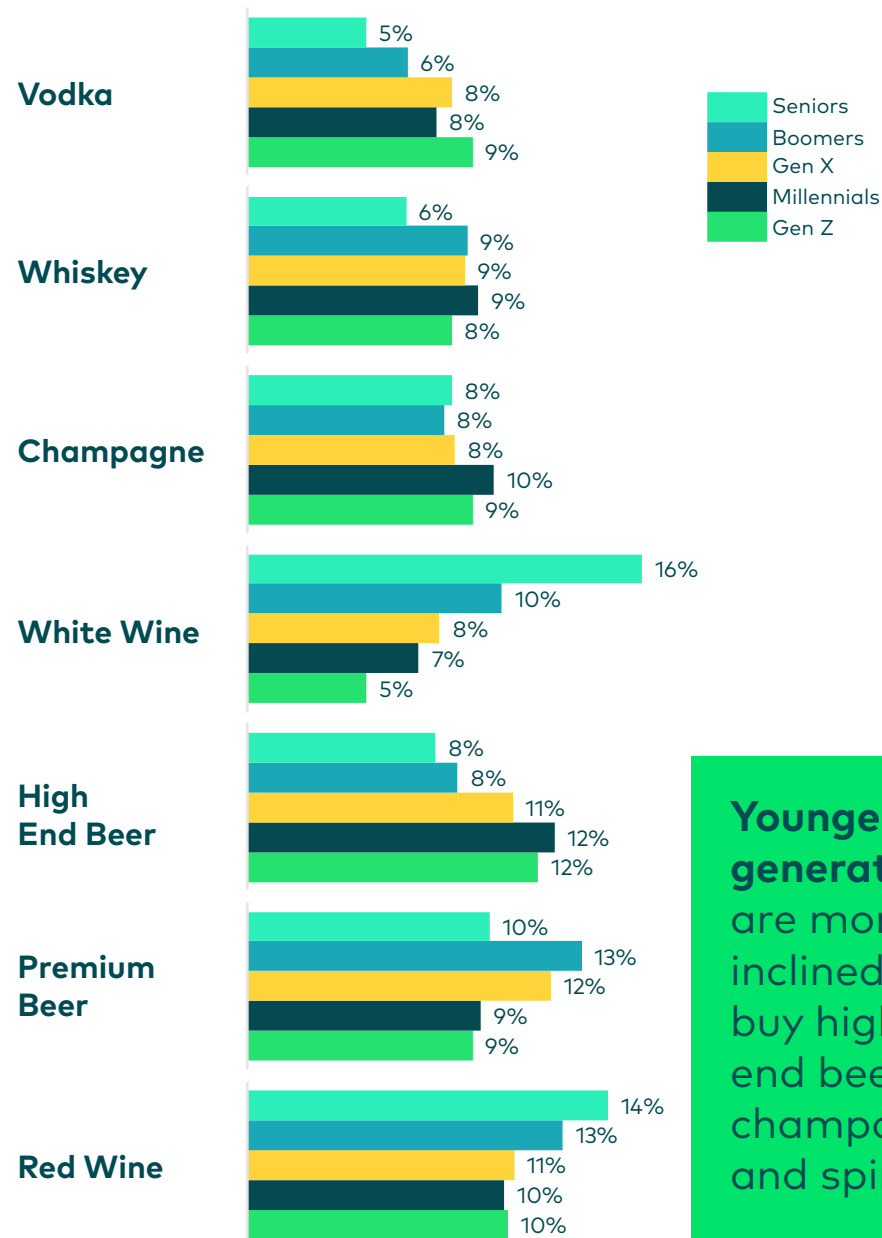
Wine and spirits outperformed beer in the weeks leading up to Christmas and New Year's



Holiday Alcohol Purchases by Generation

As Millennial and Gen Z buying power grows, the alcohol industry will likely begin seeing a shift in holiday alcohol sales by category. (Farewell, white wine in December.)

Christmas and New Year's Alcohol Spend by Generation



Younger generations are more inclined to buy high end beers, champagne and spirits.

Source: Numerator Insights; Total alcohol spend by category (12/21/2018-12/31/2018)

Items Purchased with Alcohol (Stereotypes Confirmed)

Alcohol Category	Category	Basket Affinity
CHAMPAGNE	Pita, Bagel & Cracker Chips	552
	Fresh Raspberries	487
	Spreads & Processed Cheese	462
PREMIUM BEER	Tomato & Veggie Juice	390
	Dill Pickles	376
	Classic Dips	375
WHISKEY	Ginger Ale	210
	Limes	193
	Salsa	157

Source: Numerator Insights; Top alcohol categories & grocery (12/11/2018-12/31/2018)





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This guide is just a taste of what you can learn with the power of Numerator insights. Let's dive deep into your category or brand to help answer questions like:

When do shoppers of my category start planning for the holidays?

What's influencing my shoppers' decisions?

How do peoples' attitudes or media consumption habits translate to holiday spending?

What do trip circuits look like for specific banners or items?

How do pricing and discounts for my product compare to my category overall? To my top competitors?

Do shoppers plan to look for my items online or in-store? Which retailers?

How can I capitalize on leaked trips for holiday staples?

What are the top items from my category in holiday baskets?

Give us a jingle to see how you can
win the holiday season!