



Thanksgiving 2020

Comprehensive insights for an unusual Thanksgiving holiday.

December 11, 2020



What's Inside



Retailer Share of Sales	03
Category Insights	04
Spotlight on Turkey	05
Online Shift	06
Advertising & Promotions	07

SOURCES

- Numerator share measurement data
- Early-read consumer data from **Numerator Insights**
- Advertising insights from **Numerator Ad Intel**
- Omnichannel promotions insights from **Numerator Promotions Intel**



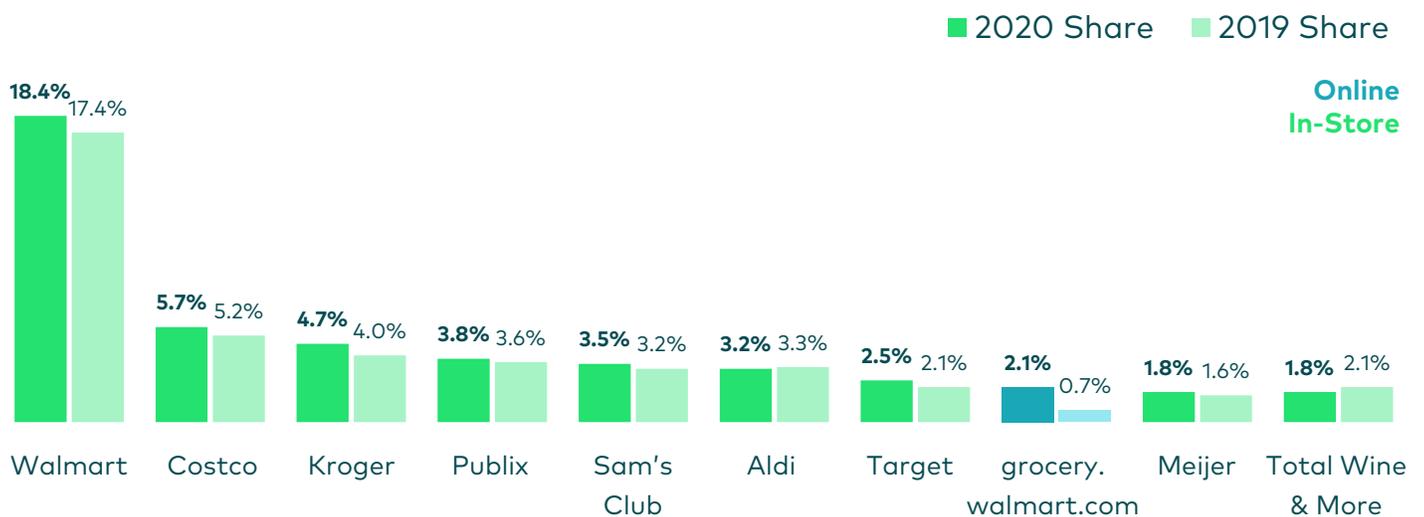
Walmart Wins Thanksgiving



Grocery sales were up across the board in advance of Thanksgiving 2020, but Walmart was the clear winner when it came to share— particularly their order online & pick-up in store option from [grocery.walmart.com](https://www.grocery.walmart.com), which **TRIPLED ITS SHARE VERSUS LAST THANKSGIVING.**

Retailer Share of Grocery Sales

Grocery Share by Banner 2020 vs. 2019



WALMART SPENT SIGNIFICANTLY LESS on advertising for Walmart Grocery in 2020 than they did in 2019. With COVID accelerating the adoption of online grocery, additional ad dollars were unnecessary for driving an increase in share for [grocery.walmart.com](https://www.grocery.walmart.com).

2020 Ad Spend

\$1.9M

2019 Ad Spend

\$3.7M

Small-Scale Celebrations Drive More Sales



Overall **GROCERY SALES WERE UP 13.6%** in the three weeks leading up to Thanksgiving vs. 2019. Increased grocery sales have been a trend throughout COVID, which was likely amplified by more, smaller Thanksgiving celebrations.

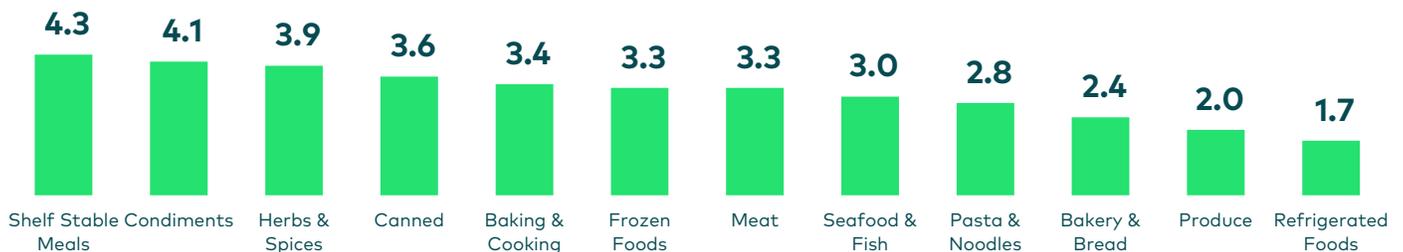
SALES WERE DRIVEN BY LARGER BASKET SIZES AND MORE HOUSEHOLDS SHOPPING.

Basket sizes were up from \$39.88 in 2019 to \$47.44 in 2020. Household penetration was up for nearly all grocery categories with the exception of Deli, which often has limited offerings now due to COVID.

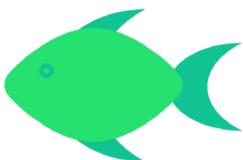


Household Penetration Growth by Category

Percentage point increase



Common Thanksgiving categories, like shelf stable meals (+4.3 percentage points), condiments (+4.1pp), herbs & spices (+3.9pp), canned foods (+3.6pp), baking & cooking (+3.4pp) saw the largest growth in HH penetration leading up to Thanksgiving vs. the comparable period last year. Some of these categories, particularly shelf stable and canned foods, have seen widespread increases since COVID.



CATEGORIES WITH THE LARGEST GROWTH in HH penetration relative to their size were Seafood & Fish (+3.0pp // 17.7%) and Refrigerated Foods (+1.7pp // 15.2%)

Turkey Sales Skyrocket



Turkey sales skyrocketed this year, **UP 29.9% FROM 2019**. Growth was driven by significant HH Penetration increases, up +5.8 percentage points from 24.5% in 2019 to 30.2% in 2020.

Nearly all of this **GROWTH WAS DRIVEN BY FROZEN**. Household penetration more than doubled from 5.2% last year to 11% this year, with dollar sales up an estimated 77%. **BASKETS CONTAINING TURKEY WERE ALSO LARGER** this year, up from \$89.32 last year to \$95.70 this year, following the trend of overall basket sizes increases



TURKEY SHOPPERS WERE YOUNGER THIS YEAR, over-indexing with Millennials & Gen Z. 22% of overall 2020 turkey buyers came from these groups, index 124 vs last year



While turkey sales were up, retailer **PROMOTIONS ON TURKEY WERE DOWN 1.3%** year-over-year, from 1198 total promoted products in 2019 to 1182 in 2020. ShopRite had the highest share (**3.1%**) of retailers running turkey promotions, followed closely by Albertsons (**3.0%**).

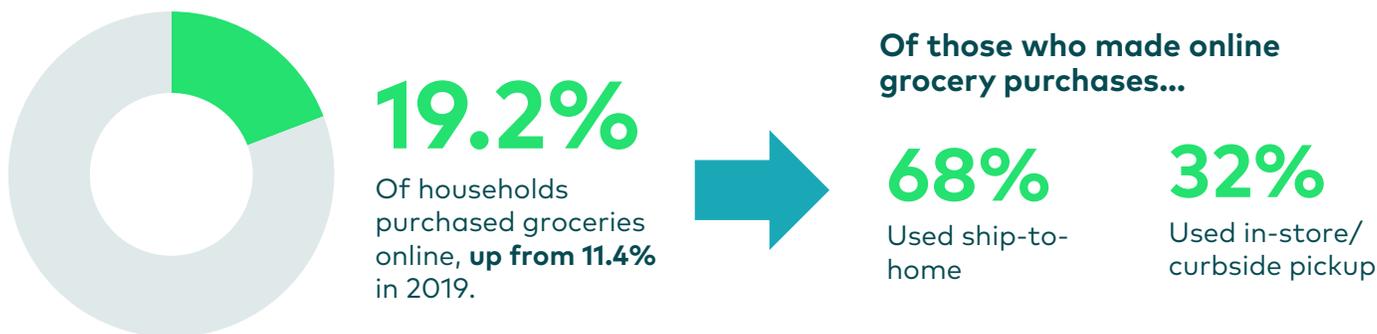
Top 10 Turkey Promoters by Share of Voice



Thanksgiving Shifts Online



Grocery sales online more than doubled versus Thanksgiving 2019. Nearly **1 IN 5 HOUSEHOLDS PURCHASED GROCERIES ONLINE** in the weeks leading up to Thanksgiving, up from roughly 1 in 10 last year.



Online baskets– particularly pickup orders– were much larger than the average in-store basket.

Average grocery basket sizes



Timing also differed slightly based on shopping method, with online orders for pickup primarily completed by the Saturday before Thanksgiving. Online orders for delivery saw a boost two days before Thanksgiving, while in-store shopping spiked the day before as individuals made last minute purchases.

Daily grocery sales by shopping method

% of sales by day



Promotions & Advertising



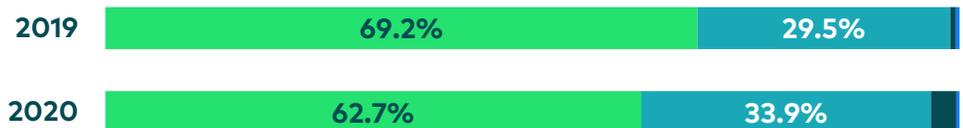
In the weeks leading up to Thanksgiving 2020 **GROCERY PROMOTIONS SAW A 7.7% DECREASE** from 2019. Top promoted categories aligned closely with those that saw a spike in sales and— mirroring shoppers' shift to online—retailers shifted towards web promotions this year.

Top Categories by Share of Grocery Promotions

Frozen	Dairy	Snacks	Beverages	Baking Needs
10.6%	10.3%	9.3%	8.0%	5.8%
Meat	Canned Foods	Condiments	Fresh Veggies	Beer
4.7%	4.1%	3.5%	3.4%	3.4%



Grocery Promotions by Media Type



■ Circular ■ Web Promotion ■ Bonus Pages ■ Email Promotion

In the 3 weeks prior to Thanksgiving 2020 **TOTAL AD SPEND BY GROCERY RETAILERS WAS DOWN 11%** versus year prior, from \$50.5M in 2019 to \$45.2M in 2020. While spend was down, occurrences were up 13%, indicating investment in lower cost advertising types in 2020.

2020 Ad Media Breakdown

Media	Ad Count	Index
Mobile	537	30
Online	4999	110
Print	445	72
Radio	78601	117
TV	26733	109

Top Advertisers, Grocery Retailers



Numerator Promo Insights; 11/8/20 – 11/28/20, Grocery Department (Does not include non-food grocery)
 Numerator Ad Intel; 11/06/20 – 11/26/20 vs. 11/08/19 – 11/28/19, All media types



Want an in-depth analysis of holiday consumer behavior and the promotions & advertising that influence it for your own brand or category?

Drop us a line today.

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