



Numerator

NEW FRONTIERS

**Beyond the Basket: Win the Turkey, Win a New
Shopper**

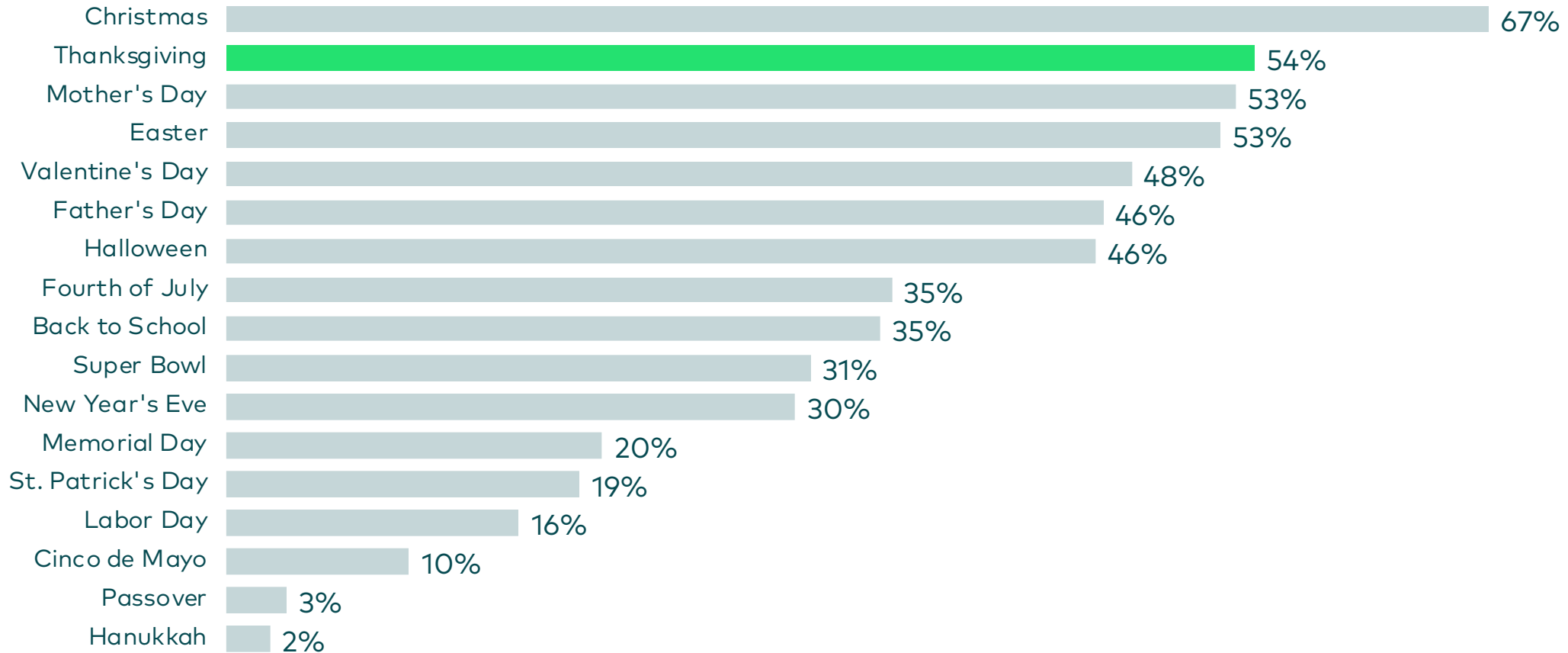
Agenda

Thanksgiving

- When are people shopping?
- What kind of trips are they taking?
- Does the "turkey trip" really matter?
- Which retailers won Thanksgiving last year?
- How'd they do it?

Thanksgiving: a top shopping holiday

In the past year, which of the following events have you shopped for?

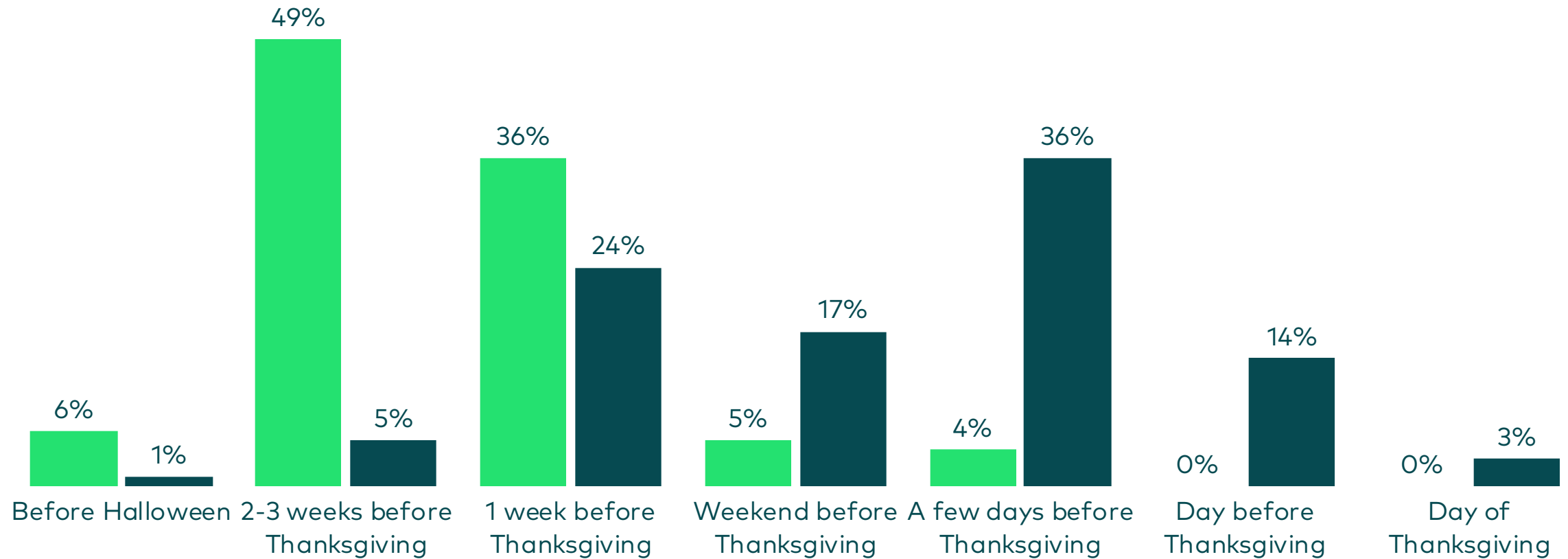


How prepared is your business
for the upcoming Thanksgiving season?

So many opportunities to capture Thanksgiving trips!

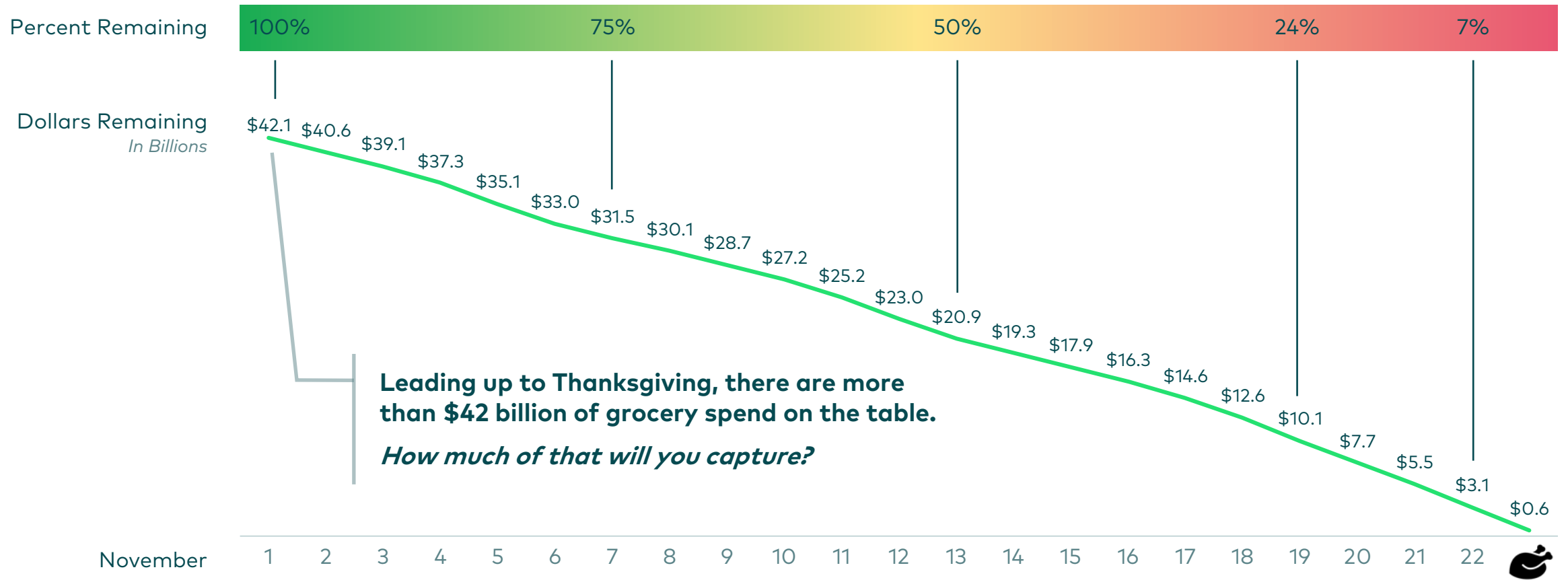
When do you plan to start and finish your Thanksgiving grocery shopping?

■ Start ■ Finish



Start early to Capture the Thanksgiving opportunity

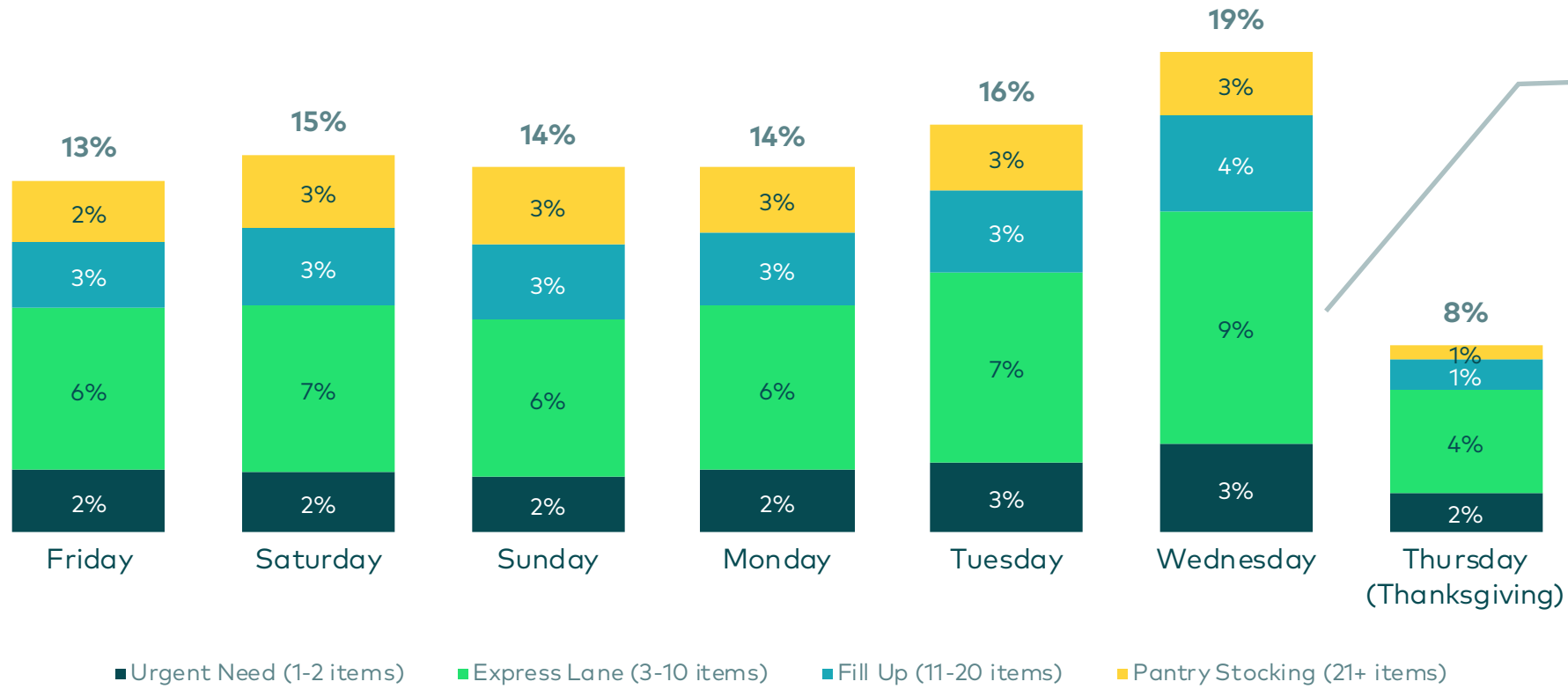
Grocery Spend Remaining, Month of November



Express Lane's popular the day before Thanksgiving, much more so than a regular Wednesday

Percent of Grocery Trips by Trip Types

Week leading up to Thanksgiving 11/17-11/23 2017



As shoppers grab last-minute items before Turkey Day, Express Lane trips jump by 50% vs. normal Wednesday

PANELIST: TURKEY TESS



Tess got her turkey early, but waited to get most of the fixings until the day before!

FRIDAY	SATURDAY	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
FOOD4LESS. \$14.71	Walmart Neighborhood Market \$31.02	Walmart Neighborhood Market \$6.76			FOOD4LESS. \$2.00	Ralphs \$4.98
STATER BROS. \$39.23				Fresh Veggies	NORTHGATE MARKET \$22.87	
STATER BROS. \$1.49				Gravy	FOOD4LESS. \$26.18	Frozen Veggies
				Coffee, Vodka	COSTCO \$90.40	
					Walmart Neighborhood Market \$18.62	
				Aluminum Foil	DOLLAR TREE \$6.40	
					Walmart Neighborhood Market \$41.34	

Weekend trips are larger, but more people shop day before Thanksgiving

	SATURDAY BEFORE THANKSGIVING	DAY BEFORE THANKSGIVING	THANKSGIVING DAY
HOUSEHOLD PENETRATION	35%	43%	19%
GROCERY ITEM SPEND PER TRIP	\$31	\$25	\$15
GROCERY UNITS PER TRIP	10	8	8

Retailers have opportunity to capture leaking Holiday dollars as shoppers look elsewhere for key items

I plan to get my Thanksgiving groceries...



Top 5 items, elsewhere

Planned purchases outside of shoppers "regular" store

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

Win the Turkey Trip, double your basket size!

\$40.97

AVERAGE BASKET SIZE
for any Grocery purchase
during 2017 Thanksgiving season

\$96.36

AVERAGE BASKET SIZE
when Turkey is in the basket
during 2017 Thanksgiving season

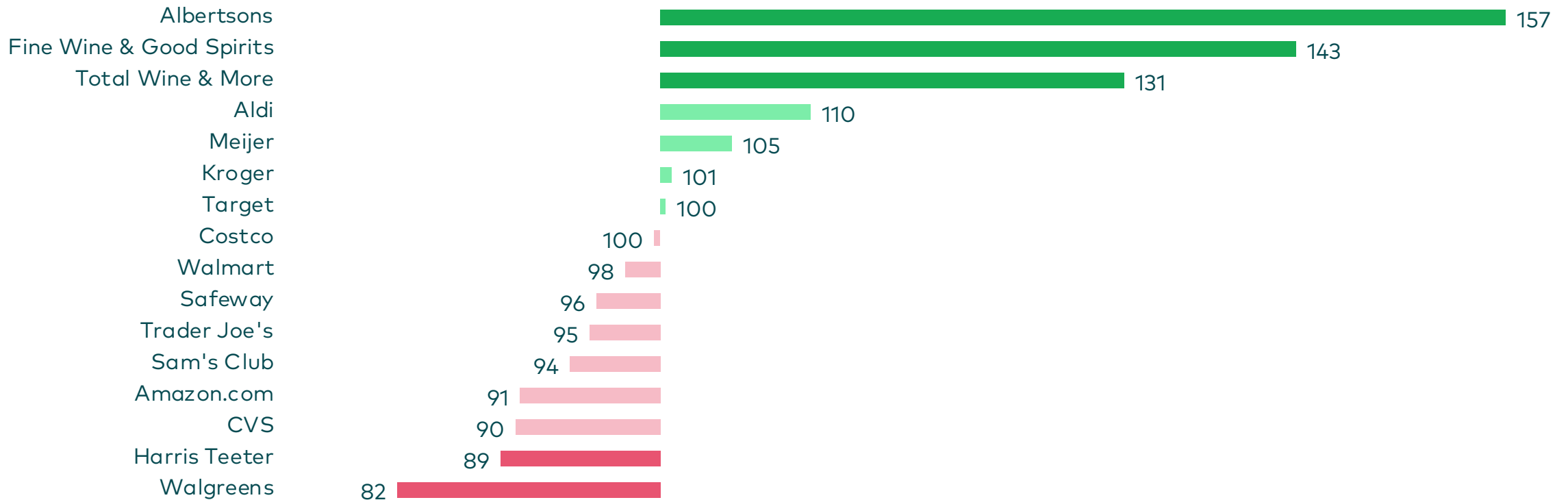
...and there are over 17 million Turkey Trips to be had!

Wow! Which retailers are winning those Thanksgiving grocery trips?

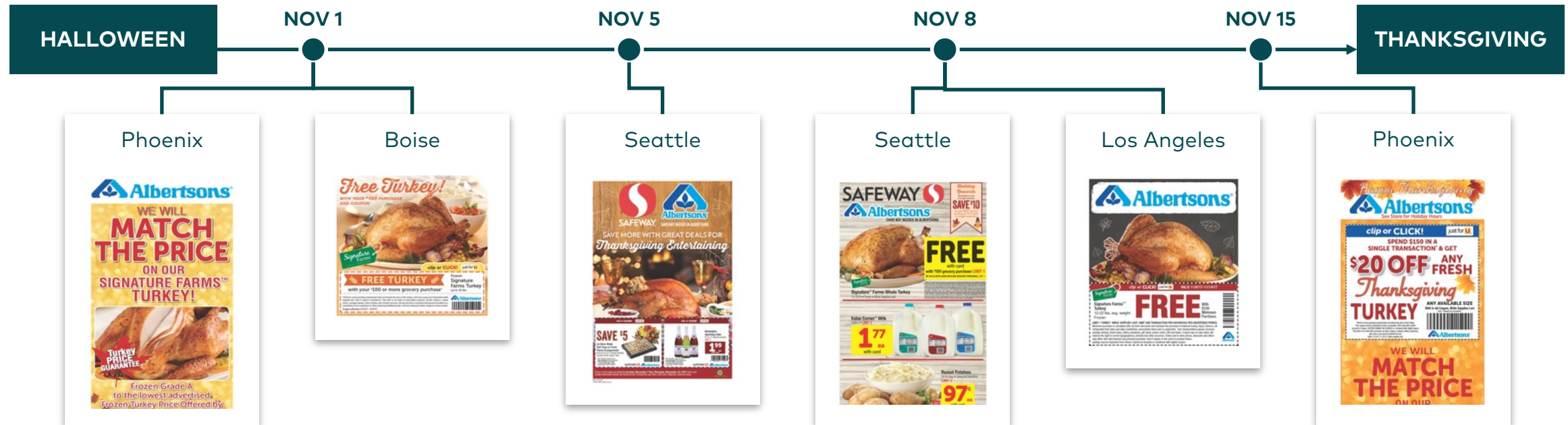
Albertsons won grocery trips, while Fine Wine and Total Wine were go-to for those leaking wine trips!

Thanksgiving 2017 Winners & Losers, by Share of Wallet

Grocery Sector SOW 3 weeks leading up to Thanksgiving indexed vs. Rest of Year



Albertsons... How'd they do it?



- **Free turkey promotion** with any \$100-\$150 grocery purchase, beginning November 1st.
- **One week earlier than competitors**, Albertsons mentioned Thanksgiving on circular front covers.
- **Turkey price matching guarantee** on circular front covers. Going out of its way to name its nearby competitors as well.
- **Deal transitions week before Thanksgiving** to a lower price-per-pound offer with \$50 purchase.

The way to a shopper's heart is through the deal!

83%

of shoppers actively look at store circulars
for the best deals on food and drink for Thanksgiving

What we're seeing

Shoppers are looking outside their normal grocer for key items

Smaller Express Lane trips spike the day before Thanksgiving

Winning the Turkey trip can double your basket size

Why it matters to you

There are tons of opportunities to capture those Thanksgiving baskets

You can capitalize on leaked trips for Turkey, Pies, and other Thanksgiving staples

Circular promotions can be used to drive business during Thanksgiving

How you can take action

Reach out to your Numerator Consultant to find out things like:

What are the top items from your category in Thanksgiving baskets?

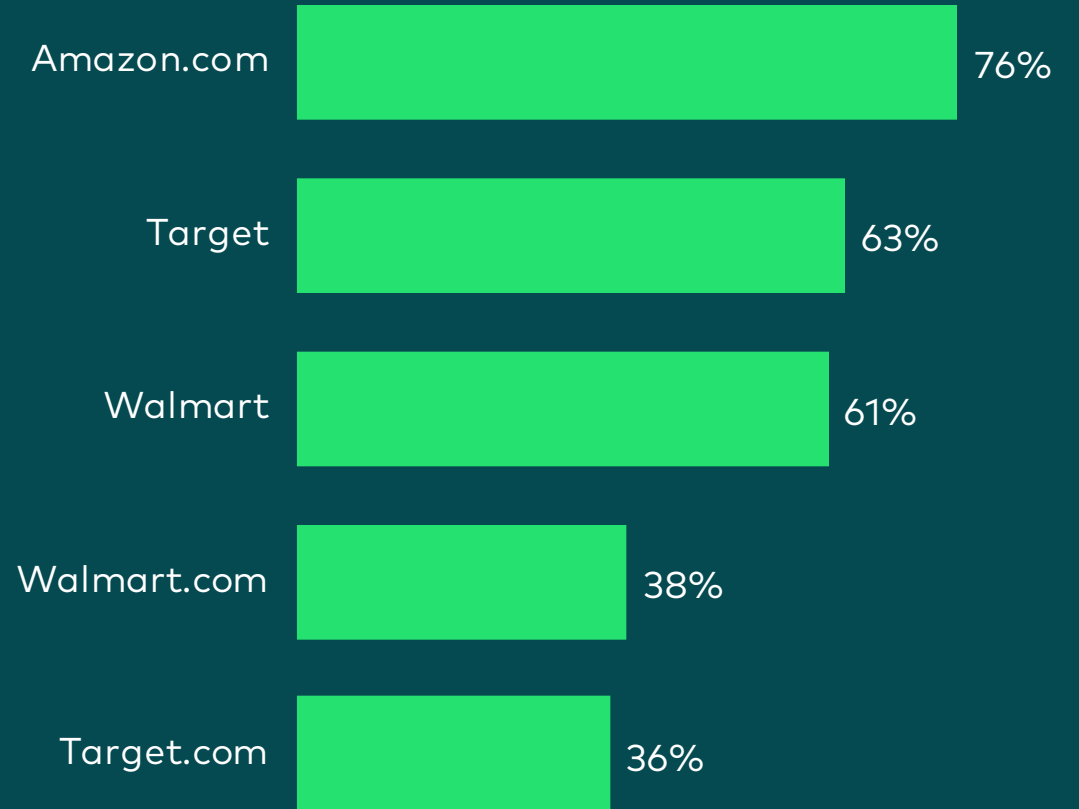
How can I capture those leaking shoppers?

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

Sneak peak: keep an eye out for our upcoming New Frontiers around Holiday Shopping!

- When do people start and finish their holiday gift shopping?
- How important are Black Friday and Cyber Monday?
- What are people planning to buy this year?
- How much gift shopping has moved online?
- What's happening with Toys?
- How can retailers make shoppers' lives easier?

Where do you plan to shop for Toys?





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Check out numerator.com/resources/e-books for more of the latest insights